

Citation style editing with zotero

WORKSHOP HANDOUT

OBJECTIVES

- 📌 Be able to find online a style by its name
- 📌 Check if a style meets my needs
- 📌 Understand basic structure of a Zotero Style with the visual Editor
- 📌 Edit basic elements and properties with the visual Editor
- 📌 Check if my customized style is suitable and correct



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PROCESS FOR AN IDEAL CITATION STYLE

1. Search a style by its name
2. Look for a similar style
3. Edit the style
4. Install the style in Zotero
5. Check/test if your style fits your needs with your own references
6. Check style's compliance with CSL



SEARCH A STYLE BY ITS NAME

Zotero proposes almost 10'000 ready-made styles. **Therefore, there are some possibilities that the style you are looking for already exists.**

In order to find a specific style, go on <https://www.zotero.org/styles/> and perform a search with the citation style name.

Zotero Style Repository

Here you can find [Citation Style Language](#) 1.0.1 citation styles for use with [Zotero](#)

Style Search **Format:** author-date

cell metabolism **Fields:** biology medicine

Show only unique styles

1 style found:

- [Cell Metabolism](#) (2016-12-14 02:01:51)

You can also look by discipline by clicking on topics on the right.

Format: author author-date label note numeric

Fields: anthropology astronomy biology botany chemistry communications
engineering generic-base geography geology history humanities law
linguistics literature math medicine philosophy physics political_science
psychology science social_science sociology theology zoology

If the style already exists, you will only need to install it in Zotero and check if it indeed fits your needs (go to chapters 4 and 5)

LOOK FOR A SIMILAR STYLE WITH CITATION STYLES EDITOR

Chapter based on Github:

<https://github.com/citation-style-language/csl-editor/wiki/User-guide-for-the-CSL-Editor>

The CSL Online Editor is available here: <https://editor.citationstyles.org/about/>

The homepage of the CSL Editor prompts a user to (1) Find a style, (2) Edit the style, (3) Use the style. Users may find a style if they know its name (Search by name) or if they know the general format of that style (Search by example).

The screenshot shows the CSL Editor homepage with the title "Find and edit CSL citation styles". Below the title is a search bar with the placeholder text "Search for the name of a style, the title of a Journal, or search by example." A yellow banner below the search bar contains the text: "Note: This set of tools is still in public beta. Please report any bugs or feedback using the form at the top right of the screen." The main content is divided into three columns:

- 1. Find a style**
 - Search by name**: "If you're looking for a style like APA, Harvard, etc... just use the search box at the top of the page to search for a style name, or journal title."
 - Search by example**: "If you don't know the name of the style, but know what the final citation should look like, you can use our search by example tool to find styles that most closely match."
- 2. Edit the style**
 - Text: "If you can't find a style that quite suits your needs, find one that's a pretty close match and click the 'Edit style' button to open that style in the visual editor."
 - Example: "American Journal of Medical Genetics" with an inline citation "[McInnis and Nelson, 2011]" and a bibliography entry "McInnis, MD, Nelson, L.P. 2011. Shaping the Body & Formation in Early America. University of Virginia Pr". Buttons for "Install" and "Edit" are shown.
- 3. Use the style**
 - Text: "Once you've found a style that's suitable for you to use, simply click the 'Install' button on the search results, or 'Save' a style you've edited, to use it in your reference manager."

Searching by example requires a user to adapt the details provided in a citation example to the style formatting they want to use.

The screenshot shows the "Search by example" process in three steps:

- 1. Using the details below...**
 - Fields: Type (book), Title (Shaping the Body Politic: Art and Political Formation in Early America), Author (Maurie Dee McInnis, Louis P. Nelson), Issued (2011), Number-of-pages (313), Publisher (University of Virginia Press), ISBN (0813931029), and Abstract (Traditional narratives imply that art in early America was severely limited in scope. By contrast, these essays collectively argue that visual arts played a critical role in shaping an early American understanding of the body politic. American artists in the late colonial and early national periods enlisted the arts to explore and exploit their visions of the relationship of the American colonies to the mother country and, later, to give material shape to the ideals of modern republican nationho...).
- 2. Type a citation in the style you require**
 - Fields: INLINE CITATION (McInnis & Nelson, 2011) and BIBLIOGRAPHY (McInnis, M. D., & Nelson, L. P. (2011). Shaping the Body Politic: Art and Political Formation in Early America. University of Virginia Press.). A "Search" button is present.
- 3. And we'll show you the closest matches.**
 - Text: "Click search to find similar styles"

Edit the example for the in-text citation and/or the bibliographic entry in order to fit your needs.

Be aware that there are several different types of example references, including: Book (with 1 author), Book (with 2 authors), Book (with editors), Book (translated), Journal Article (with 1 author), Journal Article (with 2 authors), Journal Article (many authors), Book Chapter, Report, Patent, Newspaper Article, etc. You can currently only search based on one reference type at a time. We recommend you to search by the document type you use the most.

Once you are done with the formatting process, click on *Search* button. The editor will give you several results, sorted by how close of match the style is to the formatted example citation.

3. Click "Search", and we'll show you the closest matches.

Displaying 30 results:

| | | |
|---|---|---|
| American Society of Civil Engineers | | |
| INLINE CITATION | (Campbell and Pedersen 2007) | Perfect match! |
| BIBLIOGRAPHY | Campbell, J. L., and Pedersen, O. K. (2007). "The varieties of capitalism and hybrid success." <i>Comparative Political Studies</i> , 40(3), 307–332. | 88% match |
| <input type="button" value="Install"/> | <input type="button" value="Edit"/> | <input type="button" value="View style"/> |

| | | |
|---|---|---|
| Acta Palaeontologica Polonica | | |
| INLINE CITATION | (Campbell and Pedersen 2007) | Perfect match! |
| BIBLIOGRAPHY | Campbell, J.L. and Pedersen, O.K. 2007. The varieties of capitalism and hybrid success. <i>Comparative Political Studies</i> 40 (3): 307–332. | 87% match |
| <input type="button" value="Install"/> | <input type="button" value="Edit"/> | <input type="button" value="View style"/> |

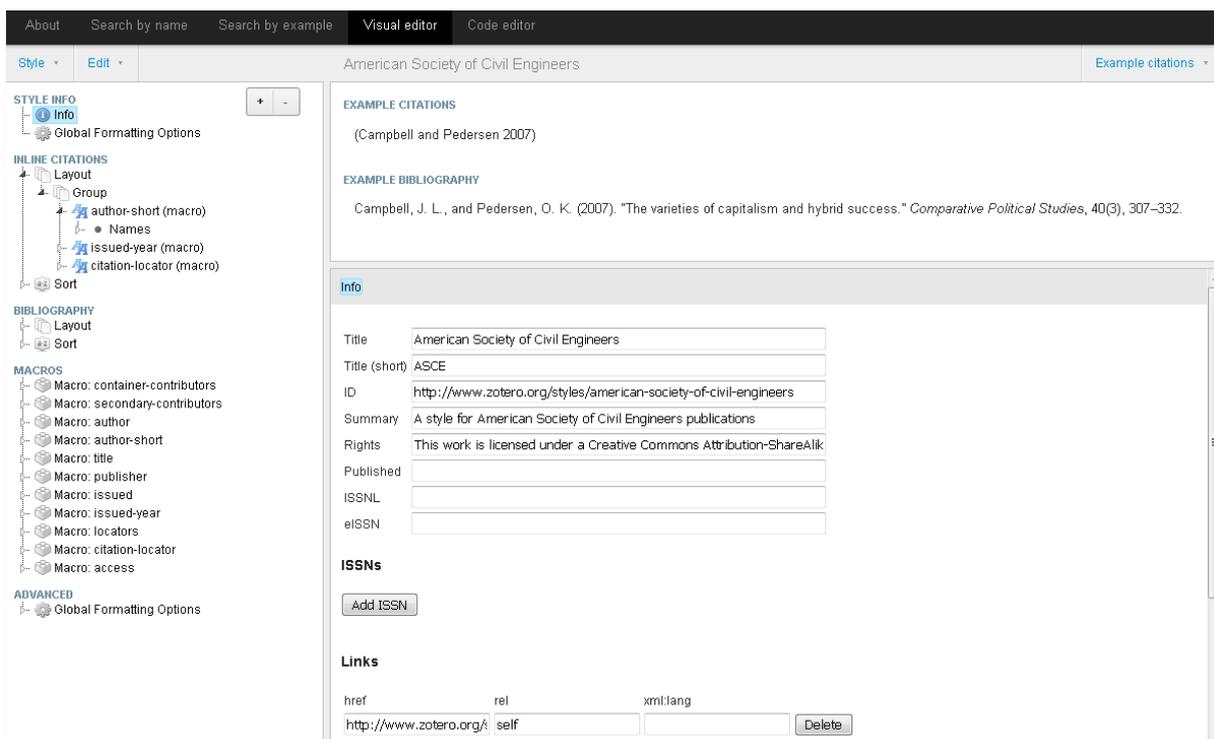
EDIT A SELECTED STYLE

Ideally, choose one of the closest matches in order to limit the edit process and click on the *Edit* button.



The Visual Editor is composed of three panes: the left window shows the tree structure of the CSL code; the top window shows example citations formatted according to the selected style; the bottom window shows some descriptive information about the selected CSL style.

The *Info* part shows you several basic information about the style. You can for instance give it a customized title in anticipation of its installation in Zotero.



On the top-right of the window, you can add or remove document types by clicking on *Example Citations* -> *Edit Citation 1/2/3*. We recommend you to work on one type of document at a time, otherwise you could be lost in details.



Parts of the tree structure

| | |
|-------------------------|--|
| STYLE INFO | General information and settings |
| INLINE CITATIONS | Inline or footnotes citations settings |
| BIBLIOGRAPHY | Bibliography settings |
| MACROS | Creation and settings for your macros |
| ADVANCED | Advanced settings for macros, inline citations and bibliography. |

Basic elements of a style structure

Editing the style means that you will need to manage hierarchy between general settings (for any element of the bibliography and document type) and specific settings.

You will need to think in advance where in the hierarchy you want to put an instruction → **does it need to include all the elements of a group or just a part of it?**

| | |
|--|---|
|  Macro: | Reusable formatting rules, instructions or patterns. Generally composed of elements listed below. |
| ● Locale | Personal settings about language |
| ● Terms | Personal settings about localized strings: each term must carry a name attribute |
|  Group | Group of rendering elements. The purpose of groups is to organize your elements and/or select options for all the group members (e.g. delimiter, prefix or suffix between elements) |

Elements/instructions that will compose your groups or macros.

| | |
|---|--|
|  Conditional | Display information according to a specific condition → <i>IF</i> |
| # number | Variable about number |
|  Text | Text according to a value, variable or a term |
| (variable) | The variables refer to fields of information in a Zotero reference. They can reflect different contexts or conditions. e.g. document title, publisher, edition, DOI, ISBN, chapter number, page number, etc. |
|  Date | Date of publication |
| ● Names | Usually author's names |
| ● Label | Terms used to announce pages, volumes, etc. |

The first step of your editing process is defining general settings. Go on *Global Formatting Options* in the left column. **This part proposes several global options that will be applied anywhere in your style**, e.g. *et-al-min* which defines how many authors are needed to put the *et.al.* option or *et-al-use-first* which defines how many authors are displayed when the option *et-al-min* is activated.

Still in *Global Formatting Options*, under the *class* option, you can also choose if you want an in-text or a footnote citation style.

You can create or delete an element wherever you are in the tree structure by clicking on the  buttons.

Create or edit your macros

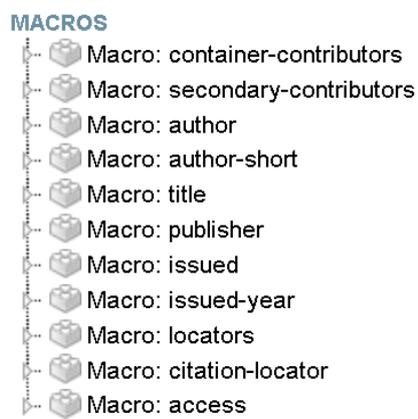
The second step is creating or editing your macros, which means several automatic instructions or patterns that will be applied to items of your bibliography. You can create and edit as many macros as you need. The purpose here is to call your macro anytime you need it instead of creating settings for every situations.

For instance, if you want the authors written in a specific way, you will just need to create a macro *Author* with all your predetermined settings. Then, you will be able to call your macro anytime you need to display to authors of the document.

Once your macro is created (or if you want to edit an already existing one), add some instructions according to your needs. For instance, if you want to display authors names, add a *Names* instruction and then a *Name* element. You can even choose several style options. Be aware that the *Complete First Name* or *Initials* option is present in your *Global Formatting Options* under *name-form* option (*long, short or count*).

A macro is composed of several elements put together such as conditional options, variables (title, page, etc.) a date, names, etc.

See below an example of a list of customized macro that will be applied into the hierarchical tree.

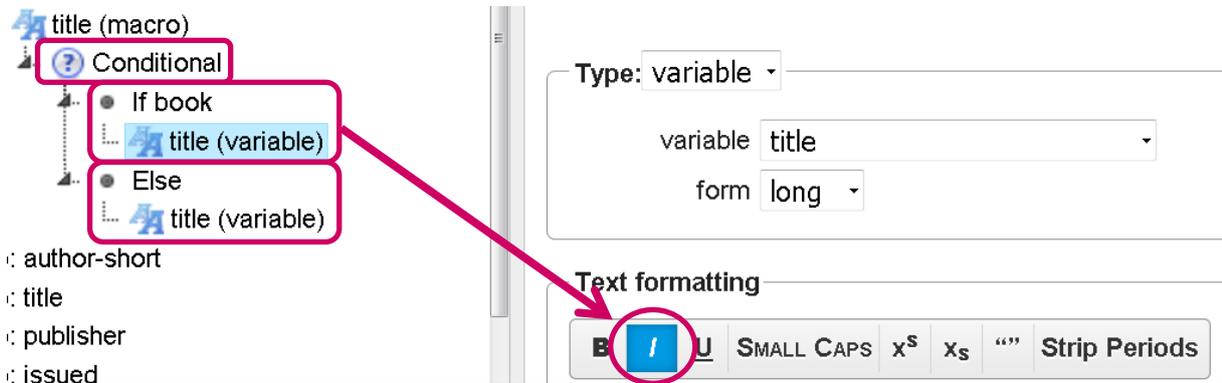


Create or edit a conditional option

Conditional are options that will be applied only if a specific condition is met. For instance, if you want that only publishers of books are in italic, you will need to create a conditional option for this purpose.

In concrete terms, a conditional option is made of a condition *IF* where you choose the criteria. For instance *IF the document type is a book OR a report then...*, *IF the variable DOI is present then...* you will then have to put the result of your condition according to your needs.

On this example concerning the macro *Title*, the author put a conditional option *IF the document type is a book* then the variable *Title* is applied in italic. Otherwise, the variable *Title* is applied in non-italic.

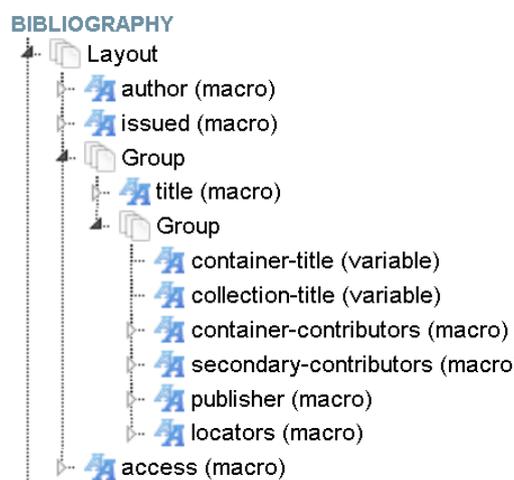


The conditional options will be useful in order to customize the bibliography according to each type of documents.

Compose or edit your hierarchical tree

Once you created your macros with conditional options, variables, numbers, text, names, etc. you will have to create a hierarchical tree for the *Inline citations* and *Bibliography* parts.

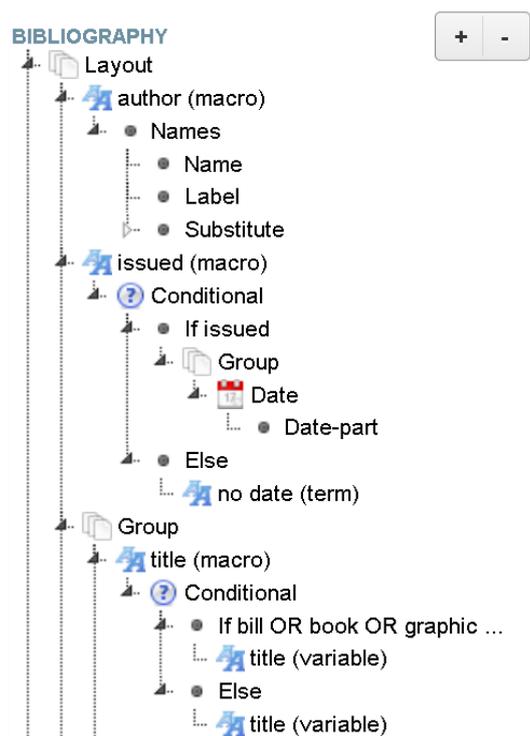
The macros, settings or criteria are put in a specific order that will reflect the order of entries in your citations or in your bibliography.



According to that hierarchical tree and the macros listed, the bibliography is written in this specific way:

Author, *Issued* (with the variable *Date ed.*), *Container title*, *Collection title*, *Container contributors*, *Secondary contributors*, *Publishers*, *Locators* and several other information in the *access* macro

If you look closer into any macro, you can see all the conditional options, variables and other elements that have been predetermined.



DOWNLOAD AND INSTALL YOUR CUSTOMIZED STYLE INTO ZOTERO

Once you have edited your style, you need to save it: *Style* → *Save Style* → *Download Style*

Be sure that you gave your style a personal name in order to identify it from the other in Zotero.



Once you downloaded the style, in Zotero go to *Preferences...* → *Cite* → *Styles*, click the "+" button and select the downloaded style.

CHECK/TEST IF YOUR STYLE FITS YOUR NEEDS WITH YOUR OWN REFERENCES

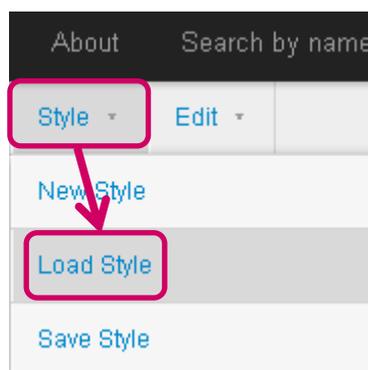
Once you installed your style, check on Zotero with your own documents if it really fits your needs.

In Zotero go on *Edit > Preference > Cite > Style Editor*



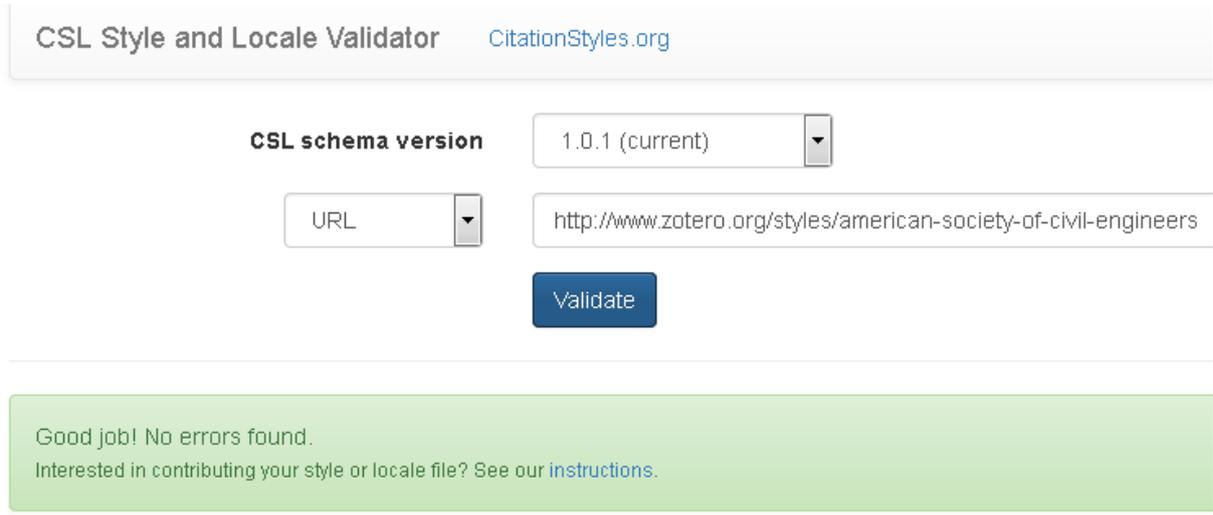
Be sure to choose several type of documents in order to evaluate the quality of each of them. If you notice any problem go back on the CSL online editor and click on *Style* → *Load Style* and choose your customized style you previously installed into Zotero.

Be aware that editing a style is an empirical and iterative process. It means that you will probably need to edit several times your style to ensure that your style will fits any situation and document types. Therefore, you will probably have to re-upload your style into the Visual Editor in order to improve it.



CHECK STYLE'S COMPLIANCE WITH CSL

Style's compliance with CSL standards is usually guaranteed if you used the CSL online editor. The only reason you would check the compliance is if you coded yourself the style in CSL. In that case, you will need to go to validator.citationstyles.org/



CSL Style and Locale Validator CitationStyles.org

CSL schema version 1.0.1 (current)

URL <http://www.zotero.org/styles/american-society-of-civil-engineers>

Validate

Good job! No errors found.
Interested in contributing your style or locale file? See our [instructions](#).

FURTHER INFORMATION

- CSL Editor's user guide

<https://github.com/citation-style-language/csl-editor/wiki/User-guide-for-the-CSL-Editor>

- Zotero > Style editing – step-by-step

https://www.zotero.org/support/dev/citation_styles/style_editing_step-by-step

- Citation Style Language - Documentation

docs.citationstyles.org/en/stable/index.html