Citation style editing with Zotero

LIBRARY WORKSHOP
OBJECTIVES

- Where can I find Zotero styles?
- How to check if a style meets my needs?
- How to edit a Zotero style?
- How to check if my customized style is suitable and correct?

You won’t get a customized style ready for use by the end of this workshop
USE / CREATE A SUITABLE 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
CONTENT VS STYLE

Vancouver

Chicago
“Schwarzschild published a solution for the field equations [1] that was later understood to describe a black hole [2,3]”


Author-date system

“Schwarzschild published a solution for the field equations (Schwarzschild 1916) that was later understood to describe a black hole (Finkelstein 1958; Kruskal 1960)”


• Schwarzschild, Karl. 1916. « On the gravitational field of a mass point according to Einstein’s theory ». *Physics* 1: 189-96.
EXAMPLE

You want to publish a paper in a journal called *Anthropology and Humanism* with its imposed style:

- In-text citation
  (Rutten and Soetaert 2013)

- In the bibliography
1. **Search a style by its name**

Zotero Style Repository

Here you can find Citation Style Language 1.0.1 citation styles for use with Zotero and other CSL 1.0.1-compatible software. For more information on using CSL styles with Zotero, see the Zotero wiki.

<table>
<thead>
<tr>
<th>Style Search</th>
<th>Format: author</th>
<th>author-date</th>
<th>label</th>
<th>note</th>
<th>numeric</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fields: anthropology</td>
<td>astronomy</td>
<td>biology</td>
<td>botany</td>
<td>chemistry</td>
</tr>
<tr>
<td></td>
<td>engineering</td>
<td>generic-base</td>
<td>geography</td>
<td>geology</td>
<td>history</td>
</tr>
<tr>
<td></td>
<td>linguistics</td>
<td>literature</td>
<td>math</td>
<td>medicine</td>
<td>philosophy</td>
</tr>
<tr>
<td></td>
<td>psychology</td>
<td>science</td>
<td>social science</td>
<td>sociology</td>
<td>theology</td>
</tr>
</tbody>
</table>

9372 styles found:

- 3D Printing in Medicine (2016-03-13 00:40:33)
- 3D Research (2015-04-21 12:08:45)
- 3D-Printed Materials and Systems (2015-04-21 12:08:45)
- 4OR (2014-04-18 01:40:36)
- AAPS Bulletin (2014-05-28 01:50:45)

[www.zotero.org/styles](http://www.zotero.org/styles)

If the style exists, you only need to install it in Zotero and check if it fits your needs (steps 4-5)
2. **Look for a similar style**

If a style perfectly matches your needs, just install it and check its characteristics with your references (steps 4-5). Otherwise, chose the closest one.
3. Edit a selected style

editor.citationstyles.org/visualEditor/

Customize the style until it meets your needs
CSL format → specific format for citation styles

```xml
<macro name="author-short">
    <choose>
        <if type="patent" variable="number" match="all">
            <text macro="patent-number"/>
        </if>
        <else>
            <names variable="author">
                <name form="short" and="symbol" delimiter="", " initialize-with="."/>
            </names>
        </else>
    </choose>
    <text variable="publisher"/>
    <text variable="title" form="short" font-style="italic"/>
</if>
<else-if type="legal_case">
    <text variable="title" font-style="italic"/>
</else-if>
<else-if type="book graphic motion_picture song" match="any">
    <text variable="title" form="short" font-style="italic"/>
</else-if>
<else-if type="bill legislation" match="any">
    <text variable="title" form="short"/>
</else-if>
<else-if variable="reviewed-author">
    <choose>
        <if variable="reviewed-title" match="none">
```
# Zotero Style Structure

<table>
<thead>
<tr>
<th>style</th>
<th>Global settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>info</td>
<td>Style description (metadata)</td>
</tr>
<tr>
<td>citation</td>
<td>In-text citation style</td>
</tr>
<tr>
<td>bibliography</td>
<td>Bibliographic entries style</td>
</tr>
<tr>
<td>macro</td>
<td>Style common edit rules</td>
</tr>
<tr>
<td>locale</td>
<td>Personal settings about language</td>
</tr>
<tr>
<td>terms</td>
<td>Personal settings about localized strings: each term must carry a name attribute</td>
</tr>
</tbody>
</table>
ZOTERO STYLE STRUCTURE

<?xml version="1.0" encoding="utf-8"?>
<info>
<title>Urban Geography</title>
<id>http://www.zotero.org/styles/urban-geography</id>
<link href="http://www.zotero.org/styles/urban-geography" rel="self"/>
<link href="http://www.zotero.org/styles/decision-sciences" rel="template"/>
<link href="https://www.tandfonline.com/action/authorSubmission?journalCode=rurb20&amp;page"/>
<author>
  <name>Patrick O'Brien, PhD</name>
  <email>obrienpat86@gmail.com</email>
</author>
<category citation-format="author-date"/>
<category field="geography"/>
<issn>0272-3638</issn>
<eissn>1938-2847</eissn>
<summary>Style for Urban Geography as per the style revision of 15 March 2017.</summary>
<updated>2019-04-12T05:42:37+00:00</updated>
<license href="http://creativecommons.org/licenses/by-sa/3.0/">This work is licensed under</license>
</info>

<macro name="author">
  <names variable="author">
    <name and="symbol" delimiter-precedes-last="always" initialize="false" name-as-sort-order label form="short" prefix="" suffix="" text-case="capitalize-first"/>
    <substitute>
      <names variable="editor"/>
      <text variable="container-title"/>
      <text variable="collection-title"/>
    </substitute>
  </names>
</macro>

<macro name="author-short">
HOW TO EDIT A STYLE?

- Notepad
- Zotero editor
- CSL Visual Editor

https://editor.citationstyles.org/visualEditor/
### Elements of a Style in the CSL Visual Editor

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>Group of rendering elements</td>
</tr>
<tr>
<td>Conditional</td>
<td>Display informations according to a specific condition → If</td>
</tr>
<tr>
<td>Number</td>
<td>Variable about number</td>
</tr>
<tr>
<td>Text</td>
<td>Text, macro, variable, etc.</td>
</tr>
<tr>
<td>Label</td>
<td>Different variables according to a context or a condition</td>
</tr>
<tr>
<td>Date</td>
<td>Date of publication</td>
</tr>
<tr>
<td>Names</td>
<td>Usually author’s names</td>
</tr>
</tbody>
</table>
EXAMPLE

You want to publish a paper in a journal called *Anthropology and Humanism* with its imposed style:

- In-text citation
  (Rutten and Soetaert 2013)

- In the bibliography
4. **Download and Install Your New Style in Zotero**

- Go to [editor.citationstyles.org/visualEditor/](editor.citationstyles.org/visualEditor/)

**Style installation instructions**

- Go to "Preferences...", "Cite", "Styles", click the "+" button and select the downloaded style.

See also the official Zotero documentation.
5. Check/test your style

Edit > Preference > Cite > Style Editor

Check if your style perfectly fits your references. If not, go back to step no3
6. **Check style’s compliance with CSL**

Does your style comply with CSL Standards?

validator.citationstyles.org/
FURTHER INFORMATION

- CSL Editor’s user guide
  

- Zotero > Style editing – step-by-step
  

- Citation Style Language - Documentation
  
ANY QUESTION LEFT?

If you have questions or need help:

Uni Mail: Dimitri.Donze@unige.ch
Uni-Arve: Vincent.huber@unige.ch