Visual CSL Editor: A guide to modifying and creating citation styles in Mendeley and Zotero

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Visual CSL Editor
A guide to modifying and creating citation styles in Mendeley and Zotero

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About this guide

When I encountered inline citations and reference lists for the first time, I was an undergraduate, and it was before the era of digital reference managers. Needless to say, my fellow students and I added references in our academic work manually, which was a tedious and frustrating process. I eagerly adopted digital reference managers when they became more prolific amongst researchers since they made the insertion, editing and management of references more efficient and quicker. They can also be used to create a new citation style, which can be useful in case a referencing style does not exist in the visual citation style language (CSL) format. While using digital reference managers, I discovered that they have certain limitations. For example, the appearance/structure of citations that reference managers produce often does not match the appearance that is required by official referencing styles (e.g., the APA style, seventh edition). Some of the issues can be corrected by changing settings in the reference manager; however, other issues require that you access and modify the citation style on which the reference manager bases the appearance of citations it generates. I embarked on informal research to understand how to modify and create a citation style; therefore, I am a self-taught citation style editor. In this light, I declare that I received no formal training in citation style editing. I documented what I learnt in this guide, which should be regarded as a draft version. By implication, the instructional texts of this guide might not provide the correct method and sequence of actions to edit a citation. Nonetheless, the methods set out in this guide produce citations that match the citation structure required by formal referencing styles. If the self-taught aspect of this guide is offset against your interest in learning the basics of citation editing, you will find the guide invaluable. That said, this guide is used at your own risk. Therefore, I cannot be held accountable if problems arise. However, I would appreciate feedback to help me improve the guide.

Table of Contents

1. INTRODUCTION

This guide is intended to demonstrate to researchers, in a series of tutorials, how to modify a citation style in Visual CSL Editor. Visual CSL Editor allows you to control the structure in which references are displayed in a document using the Mendeley or Zotero citation plug-in. In the first tutorials, you will be instructed to create, store and retrieve files. Create a folder on your desktop (or any location on your device that you prefer) for these files and name the folder *my_visualcsl*.

1.1.   Visual CSL Editor

Our first task involves opening Visual CSL Editor. To do so, follow the next steps:

- Open the browser and insert https://editor.citationstyles.org/ in the address bar to open Visual CSL editor.
- Click on VISUAL EDITOR.

CSL Visual Editor comprises three important windows, as shown in figure 1.
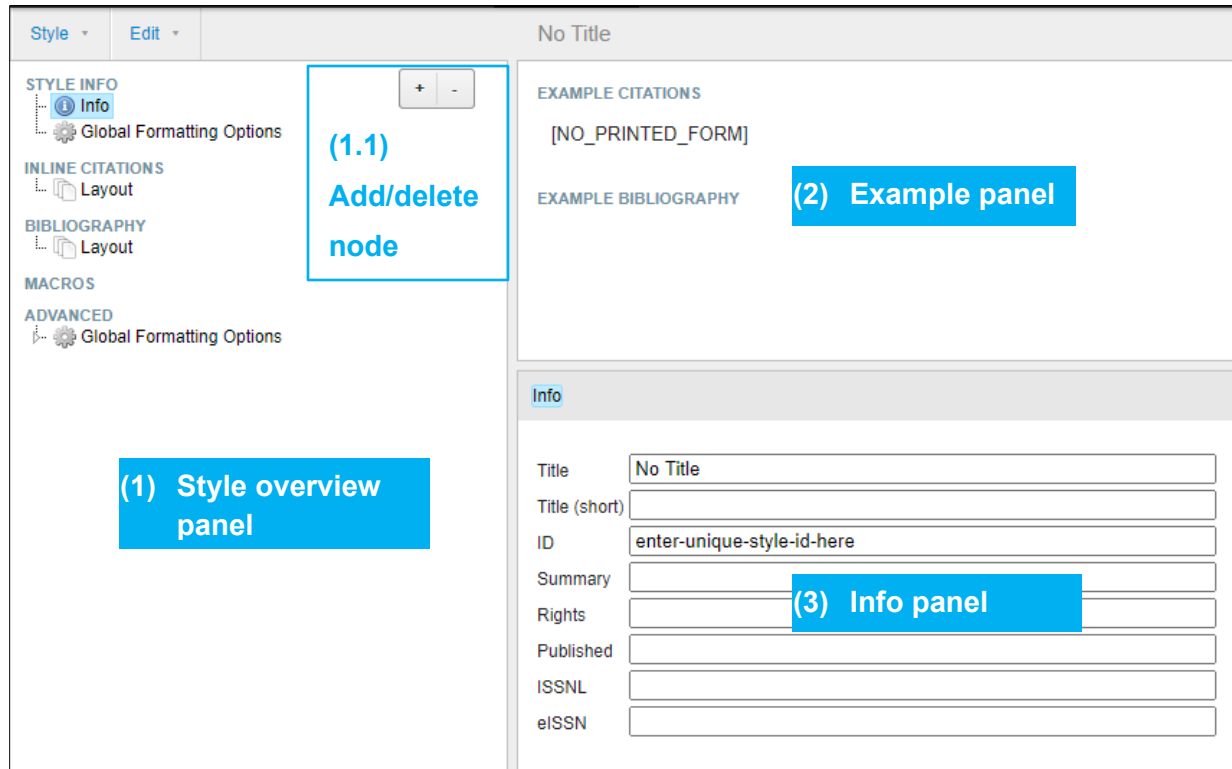
figure 1

(1) **Style overview panel:** This panel includes a variety of elements that contain logic of style.

   (1.1) **Add/delete node:** This node enables the insertion and removal of elements.

(2) **Example panel:** This panel displays a live preview of the selected style.

(3) **Info panel:** This panel shows detailed settings of the object selected on the style overview panel.

1.2.   Storing a citation style

In this section, I demonstrate how to store a citation style. This demonstration is based on the Springer - Lecture Notes in Computer Science (LNCS) referencing style. Apply the following steps to invoke the Springer - LNCS referencing style:

- In Visual CSL Editor, click on ABOUT.
- In the SEARCH box, search for "Springer - Lecture Notes in Computer Science".

Two results will be displayed for Springer - LNCS, namely, a version that sorts references in a bibliography in alphabetical order and a version that sorts references in a bibliography sequentially by order of citation (that is to say, reference 5 cannot be cited before reference 2, for example). We will work with the Springer version that sequences references by order of citation. Apply the following steps:

- Click on the EDIT button.
- On the info panel, replace the title with "Springer - LNCS (Your Name)", for example, "Springer - LNCS (Emil)".

Apply the following steps to store the file as your own:

- In the top left corner of Visual CSL Editor, click on STYLE.
- Select SAVE STYLE in the dropdown menu.
- Click on DOWNLOAD STYLE.

The file will be stored as "Springer-LNCS.csl" in the download folder of your device. Navigate to the download folder and copy the file. Paste the file into *my_visualcsl*.

1.3.   Retrieving a citation style in Visual CSL Editor

In this section, I demonstrate how to retrieve a stored citation style in Visual CSL Editor. Apply the following steps to retrieve Springer-LNCS.csl:

- In the top left window of Visual CSL Editor, click on STYLE.
- Select LOAD STYLE in the dropdown menu.
- Navigate to *my_visualcsl* on your device.
- Select Springer-LNCS.csl.
- Click on OPEN.

1.4.   Importing a citation style into Mendeley

In this section, I demonstrate how to import a citation style into Mendeley. In this demonstration, I import Springer-LNCS.csl into Mendeley. Apply the following steps:

- Launch Mendeley.
- On the menu bar, click on VIEW.
- Then select CITATION STYLE.
- Then select MORE STYLES.
- Minimise Mendeley, then navigate to the *my_visualcsl* folder*.*
- Drag Springer-LNCS.csl into Mendeley and drop it on the CITATION STYLES dialog box.

figure 2 shows the desired result.

Citation Styles

| Installed | Get More Styles | Abbreviations | About |

Q Search my citation styles

Modern Language Association 8th edition	Update Available
National Library of Medicine	
Nature	Update Available
Springer - LNCS (Emil)	Selected
Springer - Lecture Notes in Computer Science	
Taylor & Francis - Harvard X	
Vancouver	
WHO Regional Office for Europe - Harvard - Emil Arthur	

Include URLs and Date Accessed in Bibliographies: For All Document Types ▼

Citation and Bibliography Language: Default ▼

Done

figure 2

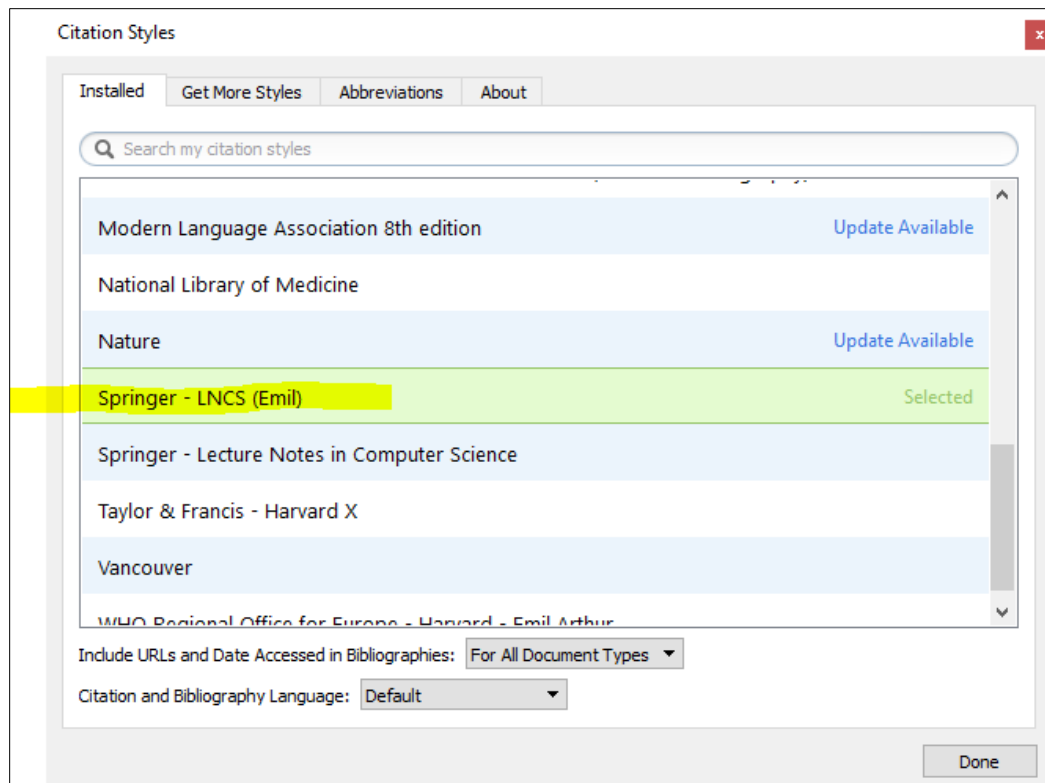## 1.5.   Importing a citation style into Zotero

In this section, I demonstrate how to import a citation style into Zotero. Apply the following steps to import Springer-LNCS.csl into Zotero:

- Launch Zotero.
- On the menu bar, click on EDIT.
- Then click on PREFERENCES.
- Click on the PLUS button.
- Navigate to *my_visualcsl* and import Springer-LNCS.csl.
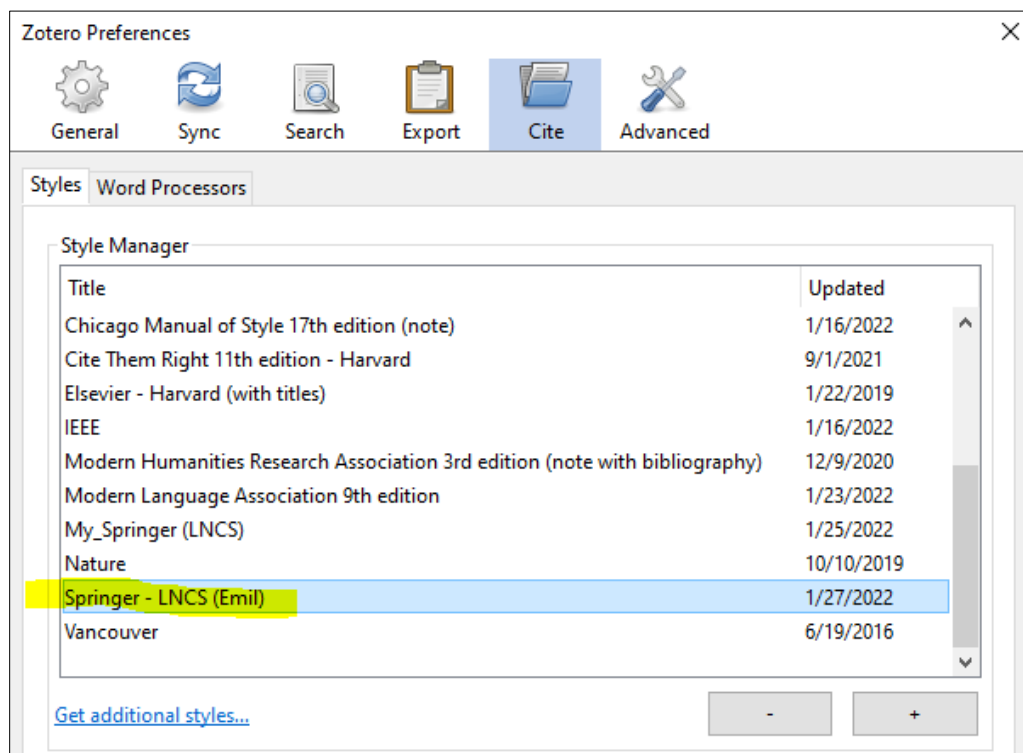
figure 3 shows the desired result.

figure 3

2. EDITING EXISTING CSL ELEMENTS

In this section, I demonstrate how to edit an existing CSL style. I use the Springer - LNCS referencing style. I intentionally selected Springer - LNCS because its version that is presently stored in Mendeley does not meet the official referencing style standard of Springer - LNCS. This guide predominantly focuses on correcting the Springer - LNCS style. In this section, I specifically demonstrate how to edit the journal article reference type. The box below compares a journal article reference that Springer - LNCS requires with a reference that Visual CSL Editor renders.

The journal article reference required by Springer - LNCS is as follows:

Author, F.: Article title. Journal 2(5), 99–110 (2016).

Dale, S.: Gamification: Making work fun, or making fun of work? Business Information Review 31(2), 82–90 (2014).

The journal article reference generated by Visual CSL Editor is as follows:

Dale, S.: Gamification: Making work fun, or making fun of work? Bus. Inf. Rev. 31, 82–90 (2014). https://doi.org/10.1177/0266382114538350.

Note the following differences when comparing the required Springer version with the Visual CSL Editor version:

- In Visual CSL Editor, the journal title is abbreviated.
- In Visual CSL Editor, the issue number is omitted.
- In Visual CSL Editor, the DOI is displayed.

2.1.   Citation example on the example panel

For the purpose of this demonstration, only a journal article reference should be displayed as a citation example on the example panel. Apply the following steps to have a journal article reference displayed as the only citation example:

- In the top right corner of Visual CSL Editor, click on the EXAMPLE CITATIONS dropdown menu.
- Select CITATION 1.
- Remove the checkmark from the CHAPTER checkbox.
- Add a checkmark to the ARTICLE-JOURNAL checkbox.
- Remove the checkmarks from the other checkboxes in CITATION 1, CITATION 2 and CITATION 3.

2.2. Abbreviated form

In a Springer - LNCS journal reference, the journal name must be displayed in full and expanded form; presently, it is displayed in abbreviated form. Apply the following steps to have the journal name displayed in full:

- On the example panel, select the journal name "Comp. Polit. Stud.".
- On the info panel below, select LONG from the FORM dropdown menu (see figure 4).

figure 4

2.3.   Prefix and suffix

In a Springer - LNCS journal reference, a full stop must **not** appear after the journal name (see figure 5). Only a character space must appear after the journal name.
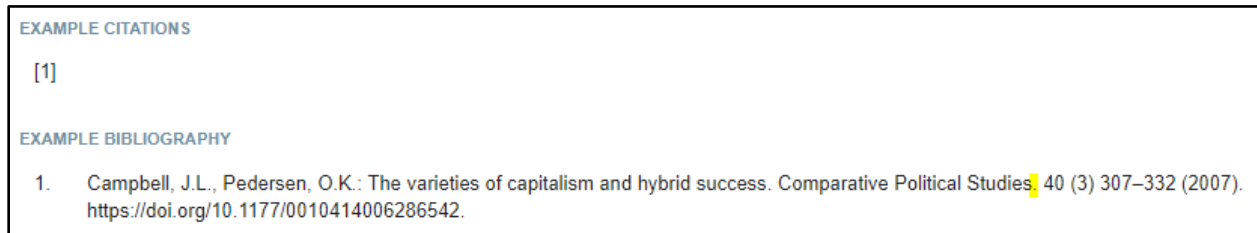

EXAMPLE CITATIONS

[1]

EXAMPLE BIBLIOGRAPHY

1.   Campbell, J.L., Pedersen, O.K.: The varieties of capitalism and hybrid success. Comparative Political Studies. 40 (3) 307–332 (2007). https://doi.org/10.1177/0010414006286542.

figure 5

Apply the following steps to remove the full stop:

- Select "Comparative Political Studies" on the example panel.
- In the info panel, remove the full stop from the SUFFIX input box.

2.4.   Adding a style element

The issue number of a journal must appear after the volume number. Apply the following step to add the issue number:

- On the example panel, select "40".

Notice that the VOLUME variable is also selected on the style overview panel; also notice that VOLUME is grouped with the TITLE, CONTAINER-TITLE, PAGE and DATE variables. Before we add the issue number, note that a comma must **not** follow after the volume number. Apply the following step to remove the comma:

- On the info panel, remove the comma from the SUFFIX input box.

Apply the following steps to add the issue number to the group:

- Select GROUP on the style overview panel, then click on the ADD NODE plus icon (see the option highlighted in yellow in figure 6 for an indication of where to click).
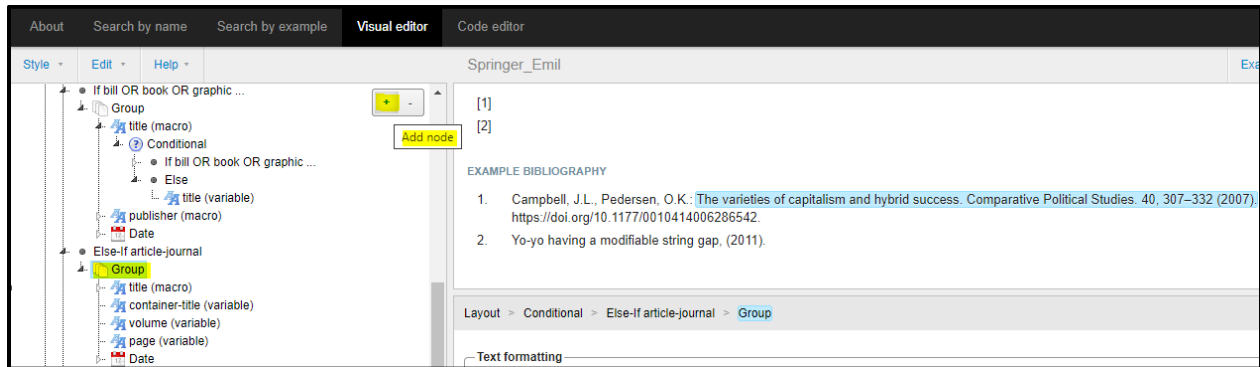

figure 6

- The issue number is contained in a TEXT variable; therefore, select the TEXT element, as shown in figure 7.
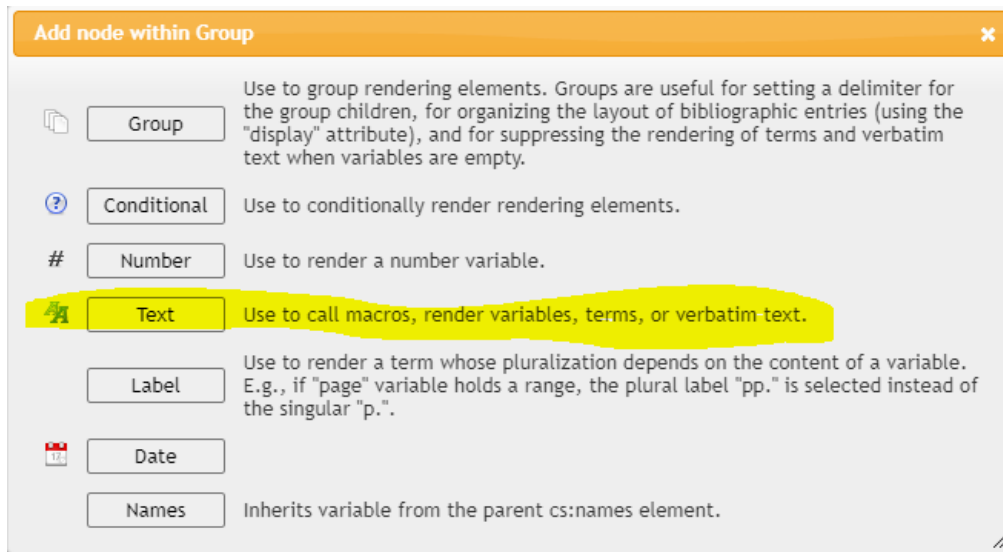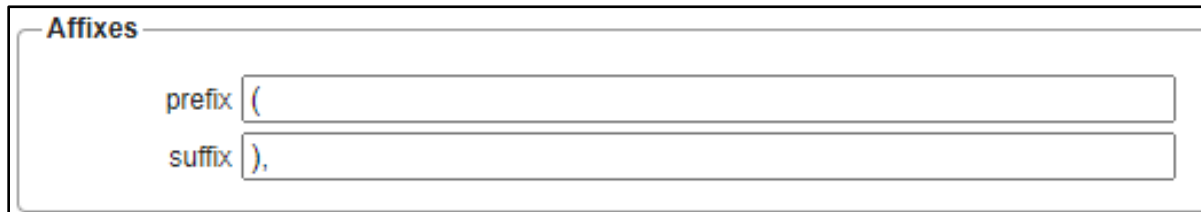

figure 7

- The new TEXT variable is added below the DATE variable; drag and drop it to place it below the VOLUME variable.
- In the info panel, select VARIABLE in the TYPE dropdown menu.
- In the VARIABLE dropdown menu, select ISSUE.

The issue number must be displayed between round brackets, that is, an opening round bracket and a closing round bracket. Also, a comma must follow the closing bracket. Apply the following steps to add brackets and a comma:
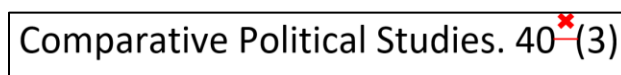
- In the AFFIXES section, insert an opening round bracket in the PREFIX input box.
- Add a closing round bracket, followed by a comma, to the SUFFIX input box (see figure 8).

figure 8

However, the result obtained is not desired. There should not be a character space between the volume number and the issue number (see figure 9). This character space appears because the group delimiter is a character space. A group delimiter denotes an item that separates the elements of a group; an item can be a character, a punctuation mark or an empty character space. In the context of the present example on the example panel, character spaces separate the paper title, the journal title, the volume number, the issue number, the page numbers and the year. In the next section, we will remove the character space as a group delimiter.

figure 9

2.5. Group delimiter

Apply the following steps to remove the character space as a group delimiter:

- On the style overview panel, click on GROUP (below ELSE-IF ARTICLE JOURNAL).
- On the info panel, click inside the DELIMITER input box and press CTRL + A on the keyboard to select everything (including open space) in the input box.
- Press the backspace key on the keyboard to remove the character space.

Notice that, on the example panel, a character space no longer separates the volume and issue numbers. However, a character space must separate the journal title and the volume number. Apply the following steps to insert a character space between these two elements:

- On the style overview panel, select the CONTAINER-TITLE variable in the BIBLIOGRAPHY section.
- On the info panel, click inside the SUFFIX input box and press the spacebar key on the keyboard to create one character space.
- Repeat the previous two steps to create a character space between the issue number and the page numbers and between the page numbers and the year.

figure 10 shows the desired result.
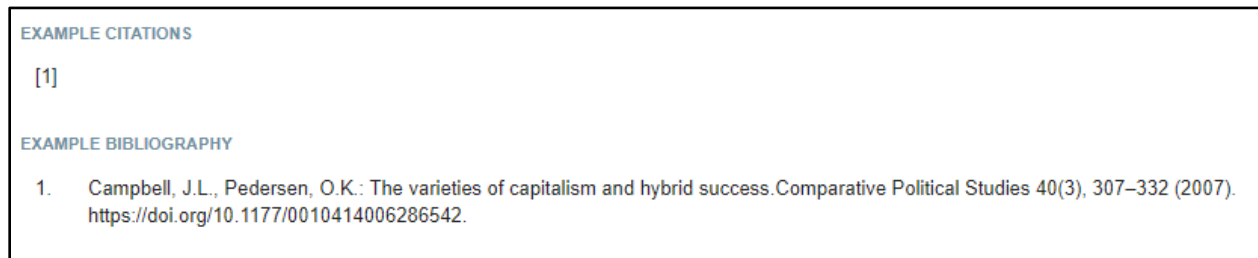
figure 10

Springer - LNCS does not require that the DOI of a journal article be provided. Apply the following step to remove it:

- Click on the DOI on the example panel to select it (note that DOI (VARIABLE) is also selected on the style overview panel).
- On the style overview panel, click on DELETE NODE.

3. CREATING A NEW CSL

In this section, I demonstrate how to create a new CSL. This new CSL is based on the Springer - LNCS referencing style.

3.1.   Setting the stage

The first step is to create a blank CSL. Apply the following steps to create a new CSL:

- In the top left corner of Visual CSL Editor, click on the STYLE dropdown menu and select NEW STYLE (see figure 11).
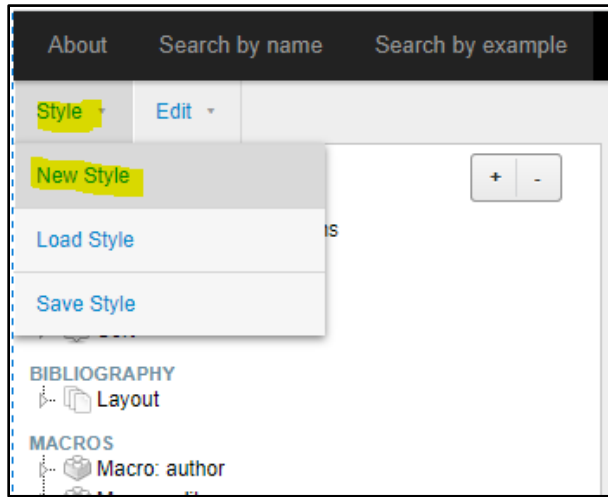
figure 11

- On the info panel, replace the title with "Springer - LNCS (Your Name)", for example, "Springer - LNCS (Emil)".

Visual CSL Editor will store your Springer-LNCS.csl file in the download folder. Move the file from the download folder to the *my_visualcsl* folder; overwrite the older Springer-LNCS.csl file.

3.2.   Journal article

In this section, I demonstrate how to build a reference type for journal articles. This demonstration is based on the Springer - LNCS referencing style. Apply the following steps so that only the ARTICLE-JOURNAL example citation is displayed on the example panel:

- In the upper right corner of the example panel, click on the EXAMPLE CITATIONS dropdown menu.

- Select CITATION 1.

- Apply a tick to the ARTICLE-JOURNAL checkbox.

- Remove ticks elsewhere.

figure 12 shows the desired result.

figure 12

Below is an example of the journal article reference type that Springer - LNCS requires:

Author, F.: Article title. Journal 2(5), 99–110 (2016).

figure 13 shows the desired end result.

EXAMPLE CITATIONS

[1]

EXAMPLE BIBLIOGRAPHY

1.   Campbell, J.L., Pedersen, O.K.: The varieties of capitalism and hybrid success.Comparative Political Studies 40(3), 307–332 (2007).

figure 13

In the next section, I will discuss the first item in the journal article reference type, namely, the citation number.

3.2.1. Citation number

In this section, I demonstrate the format that must be used for displaying inline citation numbers and citation numbers in the bibliography of a journal article. An example of the format of citation numbers that Springer - LNCS requires is provided below.

Inline citation numbers:

[1, 2]

Citation numbers in the bibliography:

1.

2.

Inline citation numbers

Apply the following steps for an inline citation number:

- On the style overview panel, in the INLINE CITATIONS section, click on LAYOUT.
- Click on ADD NODE and add a TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select CITATION-NUMBER in the VARIABLE dropdown menu.

An opening square bracket must be displayed before the citation number; a closing square bracket must be displayed after the citation number. If multiple references are cited in a given place in the text, a comma (followed by a character space) must separate the references. Before you add brackets, a comma and a character space, make sure that CHAPTER is displayed with ARTICLE-JOURNAL as a citation 1 example on the example panel. This way, you can observe how multiple references will render in the text. Apply the next steps to add the book reference type as a citation 1 example:

- Click on EXAMPLE CITATIONS in the upper right corner of Visual CSL Editor.
- Select CITATION 1 in the dropdown list.
- Add a checkmark to the CHAPTER checkbox.

Apply the next steps to add a comma, a character space and square brackets:

- On the style overview panel, inside the INLINE CITATIONS section, select LAYOUT.
- On the info panel, click inside the DELIMITER input box; add a comma and then press the spacebar key on the keyboard to add a character space.
- Add an opening square bracket to the PREFIX input box.
- Add a closing square bracket to the SUFFIX input box.

Citation numbers in the bibliography

Apply the following steps for a citation number in the bibliography:

- On the style overview panel, in the BIBLIOGRAPHY section, click on LAYOUT.
- Click on ADD NODE and add a TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select CITATION-NUMBER in the VARIABLE dropdown menu.

A full stop must appear after the citation number. Apply the following steps to add a full stop:

- In the info panel, click inside the SUFFIX input box and add a full stop.

Presently, the first-line indent of the reference type is not aligned with the second-line indent. figure 14 illustrates the misalignment between the first-line indent and the second-line indent if we were to add components to the referencing style.
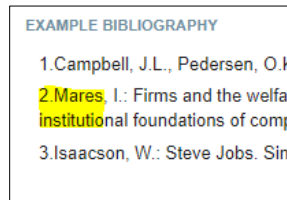
figure 14

The Springer - LNCS referencing style requires that the first-line indent be aligned with the second-line indent. Apply the following steps to ensure that the first-line indent is aligned with the second-line indent:

- Select BIBLIOGRAPHY in the style overview panel.
- On the info panel, select FLUSH from the SECOND-FIELD-ALIGN dropdown menu.

figure 15 illustrates that the first-line indent will be aligned with the second-line indent once the above steps have been followed.
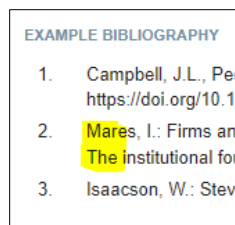
figure 15

3.2.2. Author details

In this section, I demonstrate how to insert the author item of an entry. The author format that Springer - LNCS requires is illustrated below. The first citation provided in the example has one author, and the second citation has two authors.

Inline citations:

[1]

[2]

Citations in bibliography:

1. Author, A.:

2. Author, J.J., Author, B:

In Springer - LNCS, citation numbers, instead of the (Author, year) format of other referencing styles (such as the APA style, sixth edition), are used for inline citations. In a bibliography, the last name and initial(s) of an author are separated with a comma, for example (emphasis added with yellow background colour):

Author, A

A full stop is placed after an initial, for example:

Author, J.J.

A comma separates multiple authors, for example:

Author, J.J., Author, B.

A colon is placed after the author details, for example:

Author, A.:

The treatment of last names, separators and initials in author items is the same regardless of the reference type (journal, conference paper, chapter, etc). Therefore, it is appropriate to capture their treatment in a macro, which contains several automatic instructions that are applied to its associating/linked elements in the bibliography of a document. For example, if you indicate by means of the macro that a comma must separate an author-last-name item and an author-initial item (Author, A), a comma will be inserted between all author-last-name items and author-initial items, regardless of the reference type. figure 16 illustrates (in sequential order) the journal article

reference type, the chapter reference type and the book reference type; the treatment of the last names and initials of authors was captured in a macro and subsequently applied to the different reference types.

EXAMPLE CITATIONS

[1]
[2]
[3]

EXAMPLE BIBLIOGRAPHY

1. Campbell, J.L., Pedersen, O.K.:
2. Mares, I.:
3. Isaacson, W.:
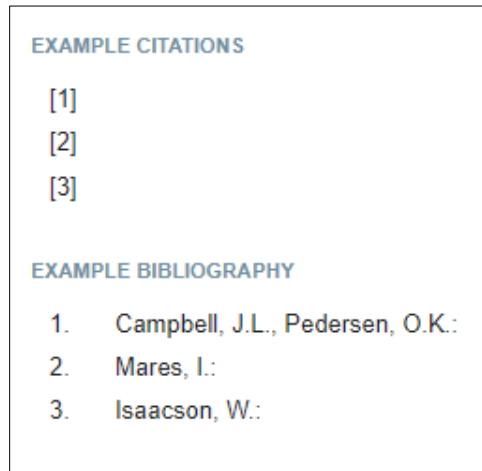
figure 16

The main objective of this section is to compile a journal article reference type; nevertheless, the treatment of last names, separators and initials in author items is the same for all reference types. Therefore, for a brief while, chapter and book citation examples should be displayed on the example panel. This will allow you to see if the treatment of author items is the same for the different reference types on the example panel. Therefore, activate the chapter reference type to be displayed as a citation 2 example and the book reference type to be displayed as a citation 3 example in Visual CSL Editor. Remove CHAPTER as a citation 1 example.

Apply the following steps to create a macro:

- On the style overview panel, click on MACROS.
- Click on ADD NODE.
- Assign the name "author(s)" to the macro.

The macro must be invoked in the BIBLIOGRAPHY section on the style overview panel. This way, as you add items to the macro, the items are instantly generated and displayed on the example panel. Apply the following steps to invoke the macro in the BIBLIOGRAPHY section:

- On the style overview panel, select LAYOUT below BIBLIOGRAPHY.

- Click on ADD NODE.

- Add the TEXT element.

- On the info panel, select MACRO from the TYPE dropdown menu.

- Select AUTHOR(S) in the MACRO dropdown list.

The desired result is shown in figure 17.
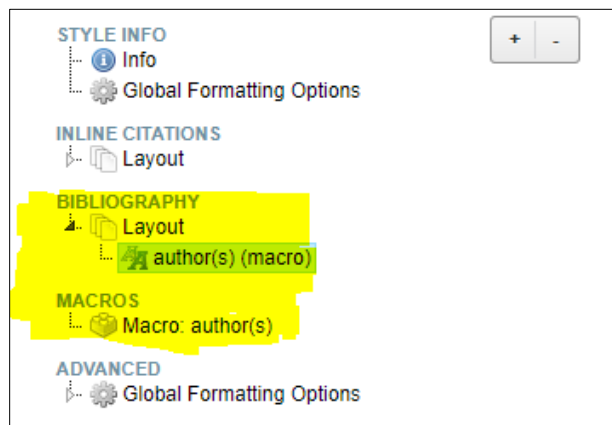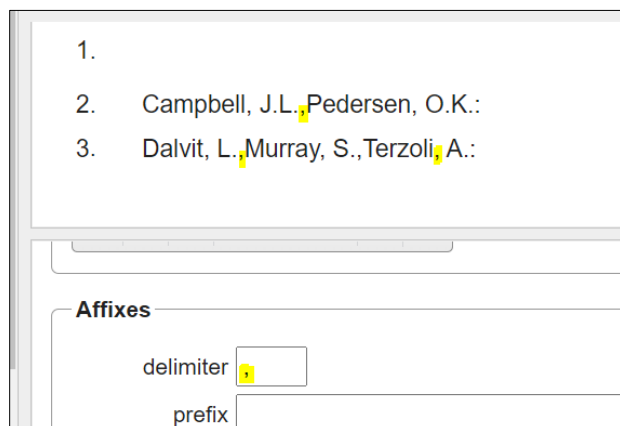
figure 17

Items can now be added to the macro. As items are added, they will be generated and displayed in the example panel. Apply the following steps to add items to the macro:

- On the style overview panel, select MACRO: AUTHOR(S).

- Click on ADD NODE, then add the NAMES parent element. This element sends automatic instructions to all author last names and their associating elements (e.g., separators) in the bibliography.

- On the info panel, in the NAMES section, click on ENABLE and then on PLUS.

- Select AUTHOR in the dropdown menu.

- On the style overview panel, click on the NAMES style.

- Click on ADD NODE.

- Add the NAME child element. This element enables the formatting of individual names, for example, determining which punctuation marks (i.e., full stops or commas) separate names and initials.

- In the info panel, add a comma to the DELIMITER input box. This action delimits the last names and initials of authors (for an example, see figure 18).
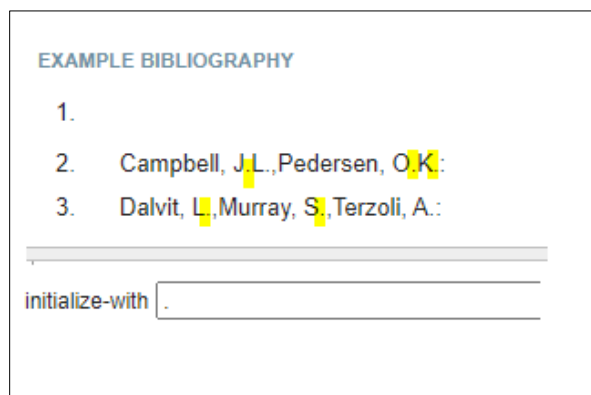
figure 18

- In the info panel, enable the INITIALIZE-WITH input box and add. This action enables the separation of an author's initials with a full stop (for an example, see figure 19).

figure 19

- On the info panel, select ALL from the NAME-AS-SORT-ORDER dropdown menu. This action enables the surnames (last names) of all authors in an entry to precede their initials. The other option, FIRST, allows only the first author's surname to precede his/her initials; the remaining authors' initials precede their surnames.
- Insert a comma in the SORT-SEPARATOR input box. This action separates an author's surname and initial(s) with a comma (for an example, see figure 20).
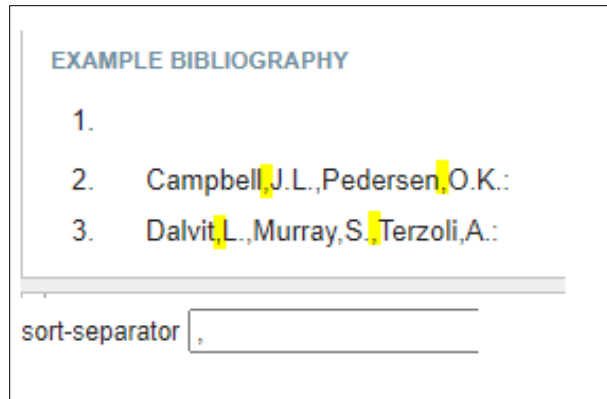
figure 20

The NAMES parent style must be separated from the title of the document with a colon. There must be one character space after the colon. Apply the following steps to add the colon and one character space:

- Click on the NAMES parent style on the style overview panel.
- On the info panel, insert a colon in the SUFFIX input box, then press the spacebar key on the keyboard to add a character space.

The desired result is shown in figure 21.
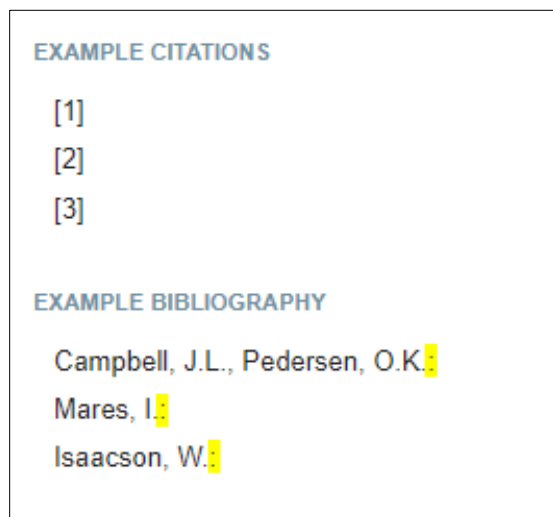
figure 21

Store the CSL file.

3.2.3. Submission title

In this section, I demonstrate how to insert a journal article title, a chapter title, a book title and a conference paper title. Regardless of the reference type, the title of an entry must be displayed after the author details and must be followed by a full stop. See an example in the box below (emphasis added with blue font colour).

1. Author, A.: Paper title.
2. Author, J.J., Author, B: Book title.
3. Author, B.: Chapter title.

Apply the following steps to add a title and a full stop:

- On the style overview panel, select LAYOUT below BIBLIOGRAPHY.
- Click on ADD NODE.
- Add a TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select TITLE in the VARIABLE dropdown menu.
- Add a full stop to the SUFFIX input box, then press the spacebar key on the keyboard to create a character space.

The desired result is shown in figure 22. The example panel shows a journal article title for citation 1, a book chapter title for citation 2 and a conference paper title for citation 3. These titles are contained in the TITLE variable. This exercise is a good illustration of a variable. Variables are storage containers for data. The data stored in a variable can later be referenced. In CSL, the titles "The varieties of capitalism and hybrid success" and "Steve Jobs" are data that were stored in the variable called TITLE. Data – for example, "Steve Jobs" – rendered in Visual CSL Editor or on Microsoft Word are an example of title data that a researcher would enter into the TITLE field in Mendeley or Zotero. Data entered into the TITLE field in Mendeley or Zotero are stored in the TITLE variable of Visual CSL Editor.

figure 22

3.2.4. Journal title

In this section, I demonstrate how to add the title of a journal. The journal title must appear after the title of the article. Data associated with the journal title are captured in the CONTAINER-TITLE variable. In the case of the chapter reference type, the book title is also captured in the CONTAINER-TITLE variable. figure 23 shows the result that will be generated if the CONTAINER-TITLE variable is added to the present CSL.

figure 23

As mentioned earlier, in the case of the journal article reference type, the journal title must follow the article title. By contrast, in the case of the chapter reference type, the word "In" (followed by the details of the editor(s)) must be displayed after the chapter title. Therefore, the result in figure 24 is wrong. figure 24 illustrates the desired result.

figure 24

To display only a specific item or set of items associated with a reference type, CSL editors rely on the conditional element. The conditional element enables CSL editors to display only certain items based on specific conditions. In the next exercise, I deploy the conditional element to ensure

that the journal title (contained in the CONTAINER-TITLE variable) appears after the article title *if* the reference type is a journal article. Apply the following steps:

- On the style overview panel, in the BIBLIOGRAPHY section, select LAYOUT.
- Click on ADD NODE and add the CONDITIONAL element.
- Click on ADD NODE and add the IF element.
- Replace ARTICLE in the third dropdown menu with ARTICLE-JOURNAL.
- Click on ADD NODE.
- Add the TEXT element.
- Select VARIABLE in the TYPE dropdown menu.
- Select CONTAINER-TITLE in the VARIABLE dropdown menu.

There must be one character space after the CONTAINER-TITLE variable. Apply the next step to add one character space:

- Click inside the SUFFIX input box, then press the spacebar key on the keyboard to create a character space.

figure 25 illustrates the desired result. In citation 2 (chapter reference type), the book title (also contained in the CONTAINER-TITLE) is **not** displayed because it is not included in the conditional element for journal articles.
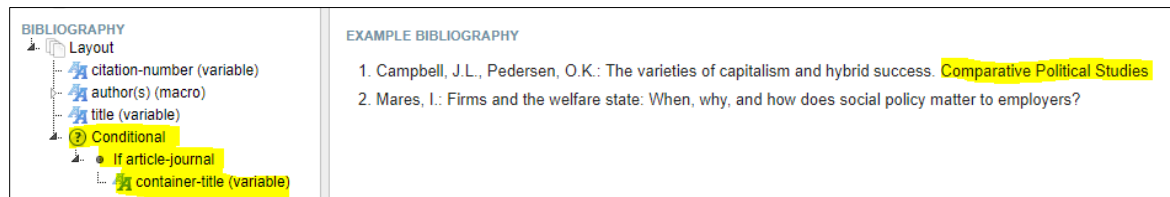
figure 25

For the next sequence of demonstrations, the citation 2 and 3 examples on the example panel need not be displayed – deactivate them.

3.2.5. Volume number, issue number, page numbers and year

In this section, I demonstrate how to add the volume number, issue number, page numbers and year of publication of a journal article. The volume number, issue number, page numbers and year must appear in this order after the journal title. An example (emphasis added with green font colour) is provided below.

Author, F.: Article title. Journal 2(5), 99–110 (2016).

The order in which these items are displayed is unique to journal articles. Therefore, these items must be added to the conditional element associated with journal articles. Apply the following steps to add the volume number of a journal article:

- Click on IF ARTICLE-JOURNAL in the style overview panel.
- Click on ADD NODE.
- Add a TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select VOLUME from the VARIABLE dropdown menu.

Next, apply the following steps to add the issue number:

- Click on IF ARTICLE-JOURNAL in the style overview panel.
- Click on ADD NODE.
- Add a TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select ISSUE in the VARIABLE dropdown menu.

There must be an opening round bracket before the issue number and a closing round bracket after the issue number. There must be a comma after the closing round bracket and a character space after the comma. Apply the following to display these items:

- Click in the PREFIX input box and add an opening round bracket.
- Click in the SUFFIX input box and add a closing round bracket, followed by a comma, and then press the spacebar key on the keyboard to create a character space.

Apply the following steps to add page numbers:

- Click on IF ARTICLE-JOURNAL in the style overview panel.
- Click on ADD NODE.
- Add a TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select PAGE from the VARIABLE dropdown menu.
- Click inside the SUFFIX input box and press the spacebar key on the keyboard to add a character space.

Apply the following steps to add the year of publication:

- Click on ARTICLE-JOURNAL in the style overview panel.
- Click on ADD NODE.
- Add the DATE element.
- Select YEAR in the DATE-PARTS dropdown menu.
- Click inside the PREFIX input box and add an opening round bracket.
- Click inside the SUFFIX input box and add a closing round bracket, followed by a full stop.

figure 26 shows the desired result.

EXAMPLE CITATIONS

[1]

EXAMPLE BIBLIOGRAPHY

1. Campbell, J.L., Pedersen, O.K.: The varieties of capitalism and hybrid success. Comparative Political Studies 40(3), 307–332 (2007).
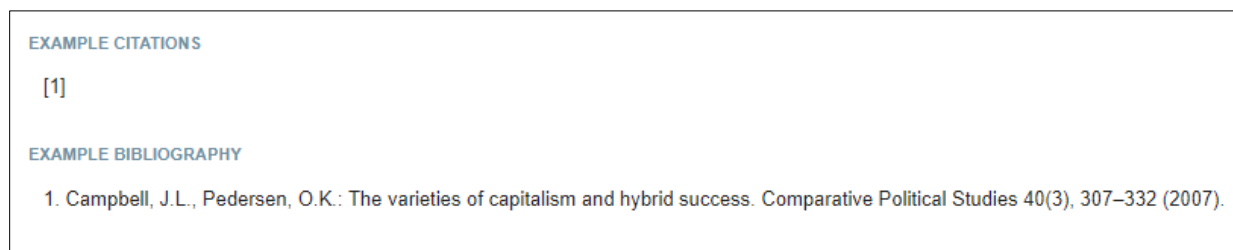
figure 26

Store the CSL file.

3.3.   Book and chapter

In this section, I demonstrate how to build referencing styles for the book and chapter reference types. This demonstration is based on the Springer - LNCS referencing style. Examples of the book and chapter reference types that Springer - LNCS requires are provided below.

Book

Author, F., Author, S., Author, T.: Book title. 2nd edn. Publisher, Location (1999).

Chapter

Author, A.: Chapter title. In: Author, K.R., Author, T.F. (eds.) Book title, pp. 1 – 2. Publisher, Location (2022).

Author, A.: Chapter title. In: Author, K.R. (ed.) Book title, pp. 1 – 2. Publisher, Location (2022).

---

figure 27 illustrates the desired end result.

EXAMPLE BIBLIOGRAPHY

1. Borges, J.L.: Selected non-fictions. 3rd edn. Viking, New York, NY (1999).
2. Mares, I.: Firms and the welfare state: When, why, and how does social policy matter to employers? In: Hall, P.A., Soskice, D. (eds.) Varieties of capitalism. The institutional foundations of comparative advantage, pp.184–213. Oxford University Press, New York (2001).

figure 27

Before we proceed, have BOOK (SELECTED NON-FICTION)[1] displayed as a citation 1 example and CHAPTER displayed as a citation 2 example on the example panel. Remove ARTICLE-JOURNAL as a citation 1 example.

3.3.1. Author and submission title

On the example panel, the book and chapter reference types already show AUTHOR(S) and TITLE because they are standard items across all reference types. Items that are specific

---

[1] Make sure that BOOK (SELECTED NON-FICTION) is selected as a citation 1 example, and not BOOK (STEVE JOBS) or BOOK (BEYOND VARIETIES OF CAPITALISM: CONFLICT, CONTRACTION, AND COMPLEMENTARITIES IN THE EUROPEAN ECONOMY). I specifically want to work with BOOK (SELECTED NON-FICTION) because it displays an edition number.

attributes of a reference type are captured in the conditional elements. For example, items that are unique to the journal reference type are captured in IF ARTICLE-JOURNAL (see figure 28).
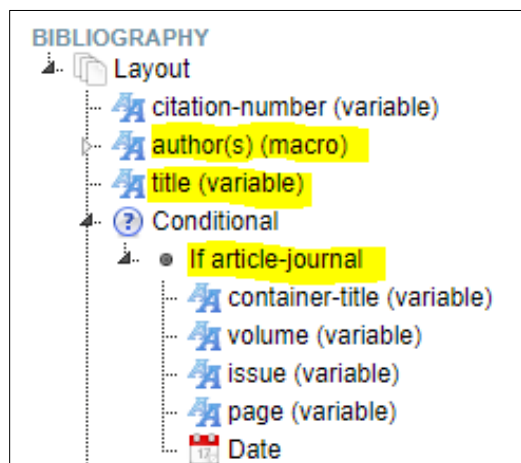
figure 28

3.3.2. Parent conditional element: book and chapter

In this demonstration, the book and chapter reference types share a conditional element. This conditional element captures items that appear in both reference types. For example, publisher, location and year appear in both reference types. This "parent" conditional element houses two "child" conditional elements, one for the book reference type and one for the chapter reference type. These conditional elements accommodate items that are unique to a specific reference type. For example, the edition number of a publication only appears in the book reference type.

Apply the following steps to create a parent conditional element for the book and chapter reference types:

- On the style overview panel, select LAYOUT in the BIBLIOGRAPHY section.
- Click on ADD NODE.
- Add the CONDITIONAL element.
- Click on ADD NODE.
- Add the IF element.
- On the info panel, replace ARTICLE with BOOK.
- Click on the PLUS button.

- Replace ARTICLE with CHAPTER.

Publisher, location and year are the last three items that appear in both the book and chapter reference types. Apply the following steps to add the publisher item:

- On the style overview panel, select IF BOOK OR CHAPTER.
- Click on ADD NODE.
- Add the TEXT element.
- Select PUBLISHER from the VARIABLE dropdown menu.

There must be a comma after the publisher and one character space after the comma. Apply the following steps to add a comma and a character space:

- Click inside the SUFFIX input box and add a comma; then press the spacebar key on your keyboard to create one character space.

The place of publication (i.e., the name of the city where the publisher is located) must appear after the name of the publisher. Apply the following steps to add the place of publication:

- On the style overview panel, select IF BOOK OR CHAPTER.
- Click on ADD NODE.
- Add the TEXT element.
- Select PUBLISHER-PLACE in the VARIABLE dropdown menu.

The place of publication must be followed by one character space. Apply the following step to add a character space:

- Click inside the SUFFIX input box, then press the spacebar key on your keyboard to create one character space.

The date of publication must follow the place of publication. Apply the following steps to add the date:

- On the style overview panel, select IF BOOK OR CHAPTER.

- Click on ADD NODE.
- Add the DATE element.

There must be an opening round bracket before the date. There must be a closing round bracket, followed by a full stop, after the date. Apply the following steps to add brackets and a full stop:

- Add an opening round bracket to the PREFIX input box.
- Click inside the SUFFIX input box and add a closing round bracket, followed by a full stop.

figure 29 shows the desired result.

EXAMPLE BIBLIOGRAPHY

1. Borges, J.L.: Selected non-fictions. Viking, New York, NY (1999).
2. Mares, I.: Firms and the welfare state: When, why, and how does social policy matter to employers? Oxford University Press, New York (2001).
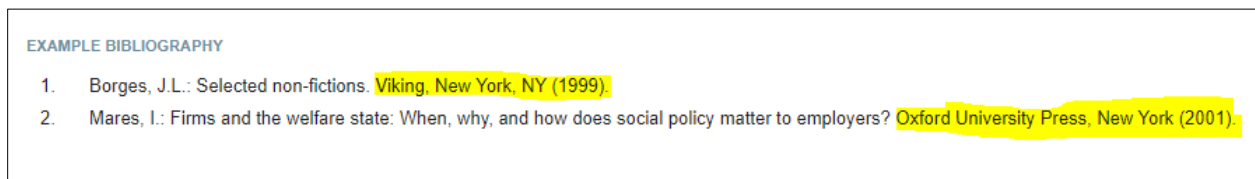
figure 29

3.3.3. Conditional child element: book

In this section, I demonstrate how to create and format the conditional element for the book reference type. As I mentioned in the previous section, this is a conditional child element, which means that it will be positioned within the IF BOOK OR CHAPTER element. All items added to this conditional element will only affect the book reference type. Apply the following steps to create the book conditional element:

- On the style overview panel, select IF BOOK OR CHAPTER.
- Click on ADD NODE.
- Add the CONDITIONAL element.
- Click on ADD NODE.
- Add the IF element.
- On the info panel, replace ARTICLE in the input box with BOOK.

This conditional element will house the edition number. The edition number must appear before the name of the publisher. Therefore, drag and drop the conditional element (the one linked to IF BOOK) to position it before the PUBLISHER variable. figure 30 illustrates the desired result.
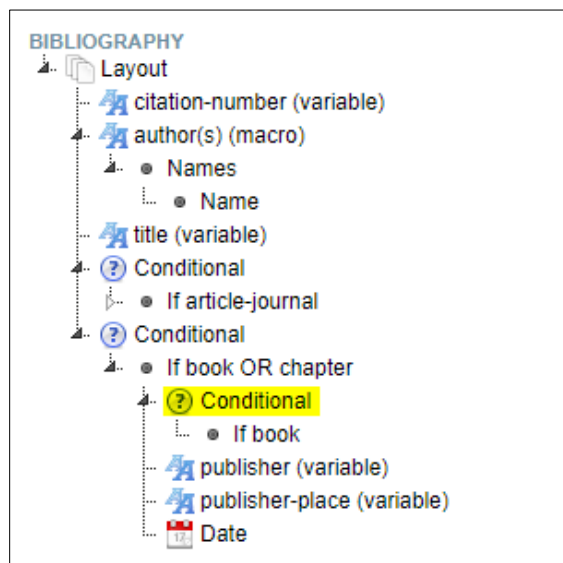
figure 30

3.3.4. Book: edition number

In this section, I demonstrate how to insert the edition number of a book. Apply the following steps:

- On the style overview panel, select IF BOOK.
- Click on ADD NODE.
- Add the NUMBER element.
- On the info panel, click on the ENABLE button.
- Select EDITION in the VARIABLE dropdown menu.

There must be a character space after the edition number. Apply the following step to add a character space:

- Click inside the SUFFIX input box and press the spacebar key on the keyboard to add a character space.

The edition number must be displayed as an ordinal number. Apply the following step to activate the ordinal format:

- Select ORDINAL in the FORM dropdown menu.

The term "edn" (an abbreviation for "edition") must appear after the edition number. Terms are captured under TYPE, which falls under TEXT. Apply the following steps to add the abbreviation for "edition":

- Select IF BOOK on the style overview panel.
- Add the TEXT element.
- Select TERM in the TYPE dropdown menu.
- Select EDITION from the dropdown menu.
- Select SHORT in the FORM dropdown menu.

The abbreviation "ed", which currently appears in the example panel, is insufficient (see figure 31). I assume that Springer - LNCS prefers "edn" to "ed" because the latter can be assumed to represent a single editor. Indeed, the short form of the term "editor" is "ed".
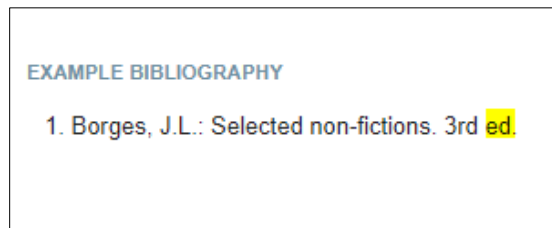
figure 31

If a term (in this case, "edn") is not available, create it using the value option of the text element. But first, "ed" must be deleted; apply the following steps to delete "ed":

- Select EDITION (TERM) on the style overview panel.
- Click on DELETE NODE.

Apply the following steps to add "edn":

- Select IF BOOK on the style overview panel.

- Click on ADD NODE.

- Add the TEXT element.

- On the info panel, click in the VALUE input box and type "edn", followed by a full stop, and then press the spacebar key on the keyboard to create one character space.

figure 23 illustrates the desired result.

EXAMPLE BIBLIOGRAPHY

1. Borges, J.L.: Selected non-fictions. 3rd edn. Viking, New York, NY (1999).
2. Mares, I.: Firms and the welfare state: When, why, and how does social policy matter to employers? Oxford University Press, New York (2001).

figure 32

3.3.5. Conditional child element: chapter

In this section, I demonstrate how to create and format the conditional element for the chapter reference type. This is a conditional child element, which means it will be positioned within the IF BOOK OR CHAPTER parent element. All items added to this conditional element will only affect the chapter reference type. Apply the following steps to create the chapter conditional element:

- In the style overview panel, click on CONDITIONAL below IF BOOK OR CHAPTER.

- Click on ADD NODE.

- Add the ELSE IF element.

- On the info panel, replace ARTICLE with CHAPTER in the dropdown menu.

In the next section, we add items to the ELSE-IF CHAPTER conditional element.

3.3.6. Chapter: "In", editor(s) and book title

The "In", editor, book title and page number items must appear before the publisher item.

In

The term "In" must appear before the editor item; the term "eds" or "ed" must appear after the editor item. Apply the following steps to add the word "In":

- On the style overview panel, select ELSE-IF CHAPTER.
- Click on ADD NODE.
- ADD a TEXT element.
- On the info panel, select TERM from the TYPE dropdown menu.
- In the TERM dropdown menu, select "in".

The term "In" must be in sentence case. Moreover, there must be a colon after "In" and a character space after the colon. Apply the following steps to apply sentence case, to insert a colon and to insert a character space:

- On the info panel, select SENTENCE case in the TEXT-CASE dropdown menu.
- Click inside the SUFFIX input box and add a colon; then press the spacebar key on the keyboard to add a character space.

Editor(s)

The structure of the editor item must be as follows (emphasis added with blue font colour):

In: Author, J.B., Author T.H. (eds.)
In: Author, J.B. (ed.)

As in the case of the author item, the structure of the editor item must be captured in a macro. The macro will automate the structure of the editor item wherever it appears. The editor item also appears in the conference proceedings reference type. Apply the following steps to create a macro:

- In the style overview panel, click on MACROS.
- Click on ADD NODE.
- Name the macro "editor(s)".

To observe how the example panel render the items as they are added to the macro, you must invoke the macro on the bibliography panel. Apply the following steps to invoke the "editor(s)" macro on the bibliography panel:

- On the style overview panel, select ELSE-IF CHAPTER.
- Click on ADD NODE.
- Add the TEXT element.
- On the info panel, select MACRO from the TYPE dropdown menu.
- Select EDITOR(S) from the MACRO dropdown menu.

Apply the following steps to create the structure of the editor item:

- On the style overview panel, click on MACRO: EDITORS.
- Click on ADD NODE.
- Add the NAMES element.
- On the info panel, in the NAMES section, click on ENABLE; select EDITOR in the variable dropdown menu.

The last editor's name must be followed by a character space. Apply the following step to add a character space:

- Select the NAMES element on the style overview panel.
- On the info panel, click inside the SUFFIX input box and press the spacebar key on the keyboard to add a character space.

In the case of multiple editors, a comma must separate the editors' names. A full stop must separate the initials of an editor or editors. Apply the next steps to add a comma and a full stop:

- On the style overview panel, select NAMES.
- Click on ADD NODE.
- Add the NAME element.
- In the info panel, add a comma to the DELIMITER input box.

- On the info panel, click on ENABLE; add a full stop in the INITIALIZE-WITH input box.
- Select ALL in the NAME-AS-SORT-ORDER dropdown menu.

The editors' names must be followed by "(eds.)" (or "(ed.)" in the case of one editor). You therefore need to add a label element, which will enable you to add an associating term to a macro, variable or style element. Apply the following steps:

- In the style overview panel, click on the NAMES element (below EDITORS (MACRO)).
- Click on ADD NODE.
- Add the LABEL element.

Notice on the example panel that the term "editors" automatically appears after the editor name item. The term is displayed in plural because the example citation contains two editors, namely, Hall and Soskice. In the case of a single editor, the term "editor" would have been displayed because CONTEXTUAL is selected in the PLURAL dropdown menu in the INFO panel. CONTEXTUAL sets the pluralisation of the term to match that of the variable content. For example, in the case of Hall being the only editor, the example panel will render "editor" and not "editors". Regardless of its singular or plural form, the term must be abbreviated Apply the following step:

- In the info panel, select SHORT in the FORM dropdown menu to display "eds."

The term "eds." must be enclosed in round brackets. Also, one character space must precede the opening round bracket. Apply the next steps to add brackets and character space.

- On the info panel, click inside the PREFIX input box, press the spacebar key on the keyboard to create one character space, and add an opening round bracket.
- Click inside the SUFFIX input box, add a closing round bracket, and then press the spacebar key on the keyboard to create one character space.

Book title

The book title (captured in the CONTAINER-TITLE variable) must appear after "(eds.)" or "(ed.)". Apply the following steps to add the book title:

- On the style overview panel, select ELSE-IF CHAPTER.
- Click on ADD NODE.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select CONTAINER-TITLE in the VARIABLE dropdown menu.

There must be a comma, followed by one character space, after the book title. Apply the following steps to add a comma and a character space:

- On the info panel, click inside the SUFFIX input box.
- Add a comma and then press the spacebar key on the keyboard to create one character space.

See figure 33 for the desired result.

EXAMPLE BIBLIOGRAPHY

1. Borges, J.L.: Selected non-fictions. 3rd edn. Viking, New York, NY (1999).
2. Mares, I.: Firms and the welfare state: When, why, and how does social policy matter to employers? In: Hall, P.A., Soskice, D. (eds.) Varieties of capitalism. The institutional foundations of comparative advantage, Oxford University Press, New York (2001).

figure 33

Store your CSL file.

3.4.   Conference paper

In this section, I demonstrate how to build a referencing style for the conference paper reference type. This demonstration is based on the Springer - LNCS referencing style. An example of the structure of the conference paper referencing style is provided below.
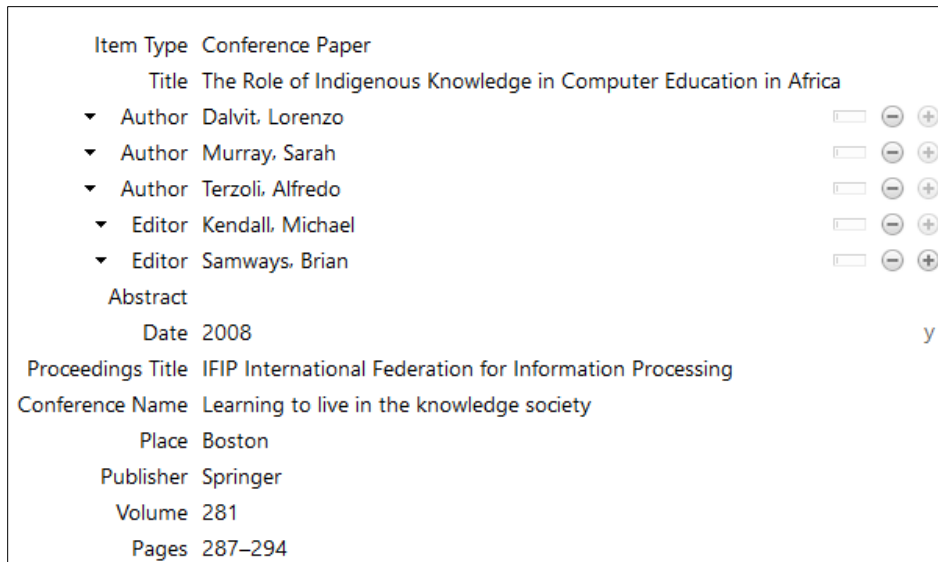
Author, F., Author, S.: Title of a proceedings paper. In: Editor, F., Editor, S. (eds.) CONFERENCE 2016, Lecture Notes in Computer Science, vol. 9999, pp. 1–13. Springer, Heidelberg (2016).

A conference paper is not a default citation example on the example panel. Therefore, you must first activate an example citation for conference proceedings. To have PAPER-CONFERENCE displayed as an example citation, metadata on conference proceedings (in JavaScript Object Notation (JSON)) must be imported into Visual CSL Editor. Mendeley cannot export files in JSON, but Zotero can.

3.4.1. Zotero: the JSON file

In this section, I demonstrate how to export a JSON file from Zotero. Apply the following steps:

- Launch Zotero.
- Click on the NEW ITEM ⊕▾ icon and select CONFERENCE PAPER in the dropdown menu.
- On the info panel, fill in the conference document information; it must match the display of data in figure 34:

Item Type	Conference Paper	
Title	The Role of Indigenous Knowledge in Computer Education in Africa	
Author	Dalvit, Lorenzo	⊖ ⊕
Author	Murray, Sarah	⊖ ⊕
Author	Terzoli, Alfredo	⊖ ⊕
Editor	Kendall, Michael	⊖ ⊕
Editor	Samways, Brian	⊖ ⊕
Abstract		
Date	2008	y
Proceedings Title	IFIP International Federation for Information Processing	
Conference Name	Learning to live in the knowledge society	
Place	Boston	
Publisher	Springer	
Volume	281	
Pages	287–294	

figure 34

Notice that I typed the proceedings title in sentence case; the proceedings title must, in fact, be in title case. I intentionally made this error for demonstration purposes. Later in this presentation I will demonstrate how the text case can be corrected in Visual CSL Editor.

Export the metadata as follows:

- Select the conference proceedings (i.e., the Dalvit et al file) in the centre column and right-click it.
- Select EXPORT ITEM in the dropdown menu.
- Select CSL JSON in the dropdown menu and click on OK.
- Save the file as "conference_metadata".

Remember the location where you save this file because you are going to import the file into Visual CSL Editor shortly. Return to Visual CSL Editor in the browser. The objective is to have conference metadata displayed as a citation 3 example. Apply the following steps to add conference metadata as a citation 3 example:

- Click on EXAMPLE CITATION in the upper right corner of the example panel – select CITATION 3.
- Click on ADVANCED to display the ADD NEW REFERENCE section.

You will notice an input box; the metadata of *conference_metadata.json* must be added to the input box in order for PAPER-CONFERENCE to be displayed as an example citation. To add the metadata to the input box, you must copy the metadata inside *conference_metadata.json* and paste it into the input box. Apply the next steps to add the metadata:

- Navigate directly to the location on your device where you stored your JSON file.
- Right-click the file and click on OPEN WITH.
- Open the file in Notepad or any other text editor.
- Select and copy all the text; return to Visual CSL Editor and paste the text into the input box.
- Click on ADD NEW REFERENCE.

You will notice that PAPER-CONFERENCE has been added as a citation example (see figure 35 below).

figure 35

BOOK is now displayed as a citation 1 example, CHAPTER is displayed as a citation 2 example and PAPER-CONFERENCE is displayed as a citation 3 example (see figure 36).

figure 36

3.4.2. Author details and submission title

On the example panel, the conference reference type already shows AUTHOR(S) and TITLE because they are standard items across all reference types. Items that are specific attributes of a reference type are captured in the conditional elements. For example, items that are unique to the book reference type are captured in IF BOOK (see figure 37).
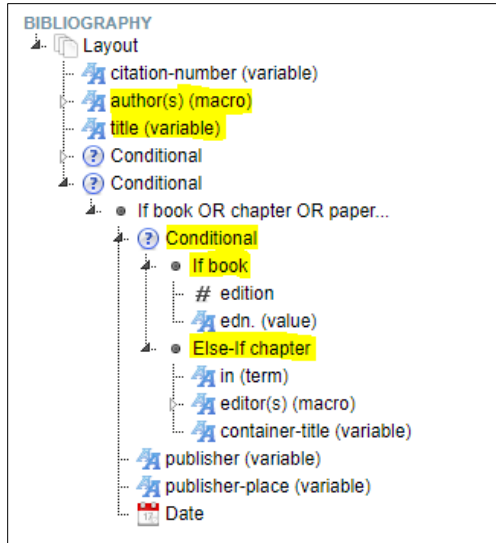
figure 37

3.4.3. Parent conditional element: book, chapter and conference

In this section, I demonstrate how to create and configure a conditional element that is shared by the book, chapter and conference reference types. This conditional element captures the items that appear in all three reference types. For example, the publisher, location and year items appear in all three reference types. This "parent" conditional element currently houses two conditional child elements, namely, the book and chapter items. These conditional elements accommodate items that are unique to a specific reference type (e.g., the edition item is only relevant with respect to the book reference type). In the exercise below, I demonstrate how to add the conference reference type to the parent conditional element. Apply the following steps:

- On the style overview panel, select IF BOOK OR CHAPTER.
- On the info panel, click on PLUS.
- Replace ARTICLE with PAPER-CONFERENCE in the dropdown menu.

On the example panel, the publisher, location and year items will be added to citation 3.

3.4.4. Child conditional element: editor(s), conference name, proceedings title, volume number and page number(s)

In the conference reference type, the editor, conference name, proceedings title, volume number and page number items must appear before the publisher item.

"In" and editor(s)

Before we add the items listed above, the term "In" and the editor item must be displayed in both the chapter reference type and the conference reference type. Consequently, "In" must be captured in a parent conditional element that is focused on chapter and conference reference types. In the exercise below, I demonstrate how to convert ELSE IF CHAPTER to ELSE IF CHAPTER OR PAPER-CONFERENCE. Apply the following steps:

- In the style overview panel, click on ELSE-IF CHAPTER.
- In the info panel, click on PLUS.
- Replace ARTICLE with PAPER-CONFERENCE in the dropdown menu.

Conference name

The conference name must appear after "(eds.)". In Visual CSL Editor, the conference name item is contained in the EVENT variable. Apply the following steps to add the EVENT variable:

- On the style overview panel, select ELSE-IF CHAPTER OR IF PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select EVENT from the VARIABLE dropdown menu.
- Apply drag and drop to place the EVENT variable below the EDITOR(s) macro.

The desired result shows in figure 38.
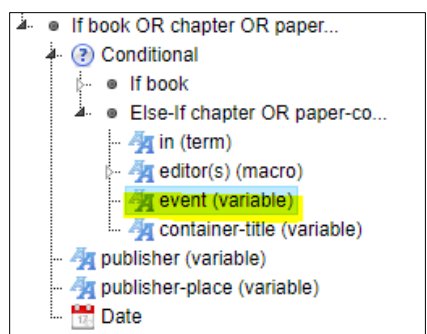
figure 38

The conference name must appear in title case. Also, there must be a comma (followed by a character space) after the conference name. Apply the following steps:

- On the info panel, select TITLE from the TEXT-CASE dropdown menu.
- Click inside the SUFFIX input box and add a comma; then press the spacebar key on the keyboard to create a character space.

Proceedings title

The proceedings title must appear after the conference name. The CONTAINER-TITLE variable houses the proceedings title. Although the CONTAINER-TITLE variable houses both the proceedings and book titles, the CONTAINER-TITLE variable for each respective reference type must be removed from ELSE IF CHAPTER OR PAPER-CONFERENCE and displayed in the respective conditional elements (i.e., ELSE IF PAPER-CONFERENCE or ELSE IF CHAPTER). This is because the text case of the CONTAINER-TITLE variable for the chapter reference type must be sentence case and the text case of the CONTAINER-TITLE variable for the conference reference type must be uppercase.

Apply the following steps to remove CONTAINER-TITLE temporarily:

- In the style overview panel, click on CONTAINER-TITLE (below ELSE IF CHAPTER OR PAPER-CONFERENCE).
- Click on DELETE NODE.

Apply the following steps to create a new conditional element for the chapter reference type:

- Select ELSE IF CHAPTER OR PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the CONDITIONAL element.
- Click on ADD NODE.
- Add the IF element.
- On the info panel, replace ARTICLE with CHAPTER.

Apply the following steps to reinsert CONTAINER-TITLE into IF CHAPTER:

- In the style overview panel, click on IF CHAPTER.
- Click on ADD NODE.
- Add the TEXT element.
- Select VARIABLE in the TYPE dropdown menu.
- Select CONTAINER-TITLE in the VARIABLE dropdown menu.

There must be a comma, followed by one character space, after the book title. Apply the following steps to add a comma and a character space:

- On the info panel, click inside the SUFFIX input box.
- Add a comma and then press the spacebar key on the keyboard to create one character space.

Apply the following steps to create a conditional element for the conference reference type:

- In the style overview panel, click on ELSE-IF CHAPTER or PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the CONDITIONAL element.
- Click on ADD NODE.
- Add the IF element.
- On the info panel, replace ARTICLE with PAPER-CONFERENCE in the dropdown menu.

Apply the following steps to reinsert CONTAINER-TITLE into IF PAPER-CONFERENCE:

- On the style overview panel, select IF PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the TEXT element.
- Select VARIABLE in the TYPE dropdown menu.
- Select CONTAINER-TITLE in the VARIABLE dropdown menu.
- Select UPPERCASE in the TEXT-CASE dropdown menu.

There must be a comma, followed by a character space, after the proceedings title. Apply the next steps to add a comma and a character space:

- Add a comma to the SUFFIX input box and then press the spacebar key on the keyboard to add a character space.

Volume number

The term "vol." (an abbreviation for "volume") must appear after the proceedings title. The volume number must appear after "vol". Apply the following steps:

- On the style overview panel, select IF PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the TEXT element.
- On the info panel, select TERM from the TYPE dropdown menu.
- Select VOLUME in the TERM dropdown menu.

The term "volume" must be abbreviated. Also, there must be one character space after the term. Apply the following steps to abbreviate "volume" and to add a character space:

- On the style overview panel, select VOLUME (TERM).
- Select SHORT from the FORM dropdown menu.
- Click inside the SUFFIX input box and press the spacebar key to add one character space.

Apply the following steps to add the volume number:

- On the style overview panel, select IF PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select VOLUME in the TERM dropdown menu.

There must be a comma, followed by a character space, after the volume number. Apply the following steps to add a comma and a character space:

- Click inside the SUFFIX input box and type a comma; then press the spacebar key on the keyboard to add one character space.

Page number(s)

The term "p." or "pp.", depending on whether a researcher references one or multiple pages, must appear after the volume number. The page number(s) must be displayed after "p." or "pp.". Apply the following steps to add the term and page numbers:

- On the style overview panel, select IF PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the LABEL element.
- On the info panel, select CONTEXTUAL from the PLURAL dropdown menu.
- Select PAGE in the VARIABLE dropdown menu.
- Select SHORT in the FORM dropdown menu.
- On the style preview panel, select IF PAPER-CONFERENCE.
- Add the TEXT element.
- Select VARIABLE in the TYPE dropdown menu.
- Select PAGE in the VARIABLE dropdown menu.

Notice that "pp." displays on the example panel. The term is displayed in plural because the example citation references a page range, namely, "pp. 287–294". In the case of a single page, the term "p." would have been displayed because CONTEXTUAL is selected in the PLURAL

dropdown menu in the INFO panel. CONTEXTUAL sets the pluralisation of the term to match that of the variable content. For example, in the case of a single page number, "p." and not "pp." renders in the example panel.

There must be one character space after "p." or "pp.". Apply the following step to add a character space:

- Click inside the SUFFIX input box and press the spacebar key to add one character space.

Apply the following steps to add the page numbers:

- On the style overview panel, select IF PAPER-CONFERENCE.
- Click on ADD NODE.
- Add the TEXT element.
- On the info panel, select VARIABLE in the TYPE dropdown menu.
- Select PAGE in the TERM dropdown menu.

There must be a full stop, followed by one character space, after the page numbers. Apply the following steps to add a full stop and a character space:

- Click inside the SUFFIX input box and type a full stop; then press the spacebar key on the keyboard to add one character space.

figure 39 illustrates the desired result.

EXAMPLE BIBLIOGRAPHY

1. Borges, J.L.: Selected non-fictions. 3rd edn. Viking, New York, NY (1999).
2. Mares, I.: Firms and the welfare state: When, why, and how does social policy matter to employers? In: Hall, P.A., Soskice, D. (eds.) Varieties of capitalism. The institutional foundations of comparative advantage. Oxford University Press, New York (2001).
3. Dalvit, L., Murray, S., Terzoli, A.: The Role of Indigenous Knowledge in Computer Education in Africa. In: Kendall, M., Samways, B. (eds.) IFIP INTERNATIONAL FEDERATION FOR INFORMATION PROCESSING, Learning to Live in the Knowledge Society, vol. 281, pp. 287–294. Springer, Boston (2008).

figure 39

3.4.5. Mendeley and Zotero: rendering of a conference proceedings entry

In Microsoft Word, Mendeley renders an incomplete reference in the bibliography, as shown in the example below.

> Dalvit, L., Murray, S., Terzoli, A.: The Role of Indigenous Knowledge in Computer Education in Africa. In: Kendall, M., Samways, B. (eds.) LEARNING TO LIVE IN THE KNOWLEDGE SOCIETY, vol. 281, pp. 287–294. Springer, Boston (2008).

The conference name is missing from the reference. This omission occurs because Mendeley's DETAILS panel does not contain a field for a conference name. Zotero's DETAILS panel does have such a field. This is an important distinction because Visual CSL Editor links its EVENT variable to the CONFERENCE TITLE field in Zotero. Visual CSL Editor cannot do the same in Mendeley because Mendeley does not have an EVENT or similar field to which it can link its EVENT variable. Therefore, Zotero renders a complete reference in Microsoft Word – an example is provided below.

> Dalvit, L., Murray, S., Terzoli, A.: The Role of Indigenous Knowledge in Computer Education in Africa. In: Kendall, M., Samways, B. (eds.) IFIP INTERNATIONAL FEDERATION FOR INFORMATION PROCESSING, Learning to Live in the Knowledge Society, vol. 281, pp. 287–294. Springer, Boston (2008).

3.5. Webpage

In this section, I demonstrate how to build a referencing style for the webpage reference type. This demonstration is based on the Springer - LNCS referencing style. An example of the structure of the webpage reference type is provided below.

> Webpage title, URL, last accessed 2022/01/21.

figure 40 displays the desired end result.
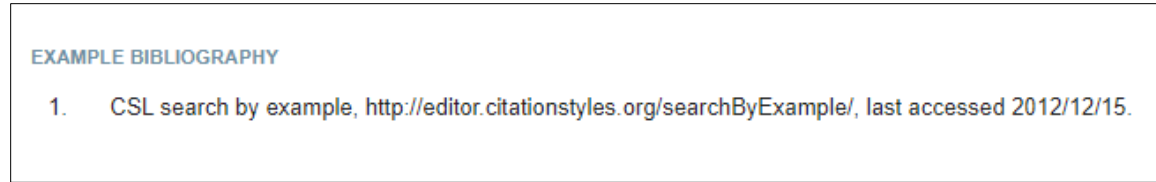
figure 40

In contrast to the other reference types where the author item appears after the citation number, the title of a webpage appears after the citation number in the webpage reference type. The URL is provided after the title of the webpage. The term "last accessed" appears after the URL. The date on which the webpage was last accessed is indicated after "last accessed". These items must be captured in a conditional element.

For this exercise, have a webpage displayed as the only citation example in the example panel. The webpage title will already appear because it is captured in the TITLE variable (see figure 41).
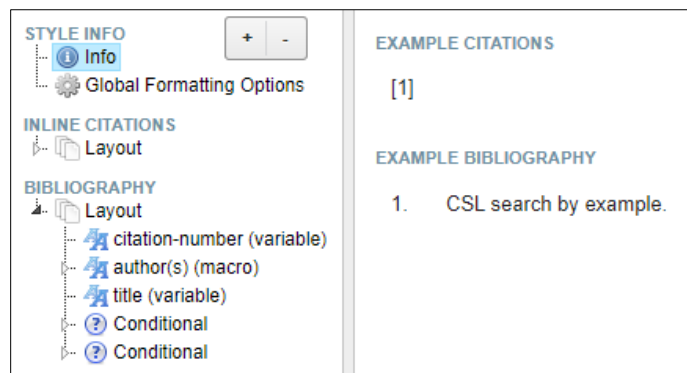
figure 41

3.5.1. Conditional element: webpage

Apply the following steps to create a conditional element for the webpage reference type:

- On the style overview panel, select LAYOUT in the BIBLIOGRAPHY section.
- Click on ADD NODE.
- Add the CONDITIONAL element.
- Click on ADD NODE again.
- Add the IF element.

- Replace ARTICLE with WEBPAGE

3.5.2. URL

Apply the following steps to add the URL:

- On the style overview panel, select IF WEBPAGE.
- Click on ADD NODE.
- Add the TEXT element.
- Select VARIABLE in the TYPE dropdown menu.
- Select the URL from the VARIABLE dropdown menu.

There must be a comma, followed by a character space, after the URL. Apply the following steps to add a comma and a character space:

- Click inside the SUFFIX box and add a comma; then press the spacebar key on the keyboard to add a character space.

3.5.3. The term "last accessed"

Apply the following steps to add "last accessed":

- On the style overview panel, select IF WEBPAGE.
- Click on ADD NODE.
- Add the TEXT element.
- Select TERM from the TYPE dropdown menu.
- Select ACCESSED from the TERM dropdown menu.

The term "last", followed by a character space, must appear before "accessed". There must be a character space after "accessed". Apply the following steps to add "last" and a character space:

- Click inside the PREFIX input box, type "last" and press the spacebar key on the spacebar to add a character space.

- Click inside the SUFFIX input box and press the spacebar key on the keyboard to add a character space after "accessed".

3.5.4. Date (last accessed)

Apply the following steps to add the date on which the user last visited the webpage:

- On the style overview panel, select IF WEBPAGE.
- Click on ADD NODE.
- Add the DATE element.
- On the info panel, select ACCESSED in the VARIABLE dropdown menu.

The date must be displayed in the following format: year/month/day (e.g., 2022/01/21). A forward slash must separate the year, the month and the day. There must be a full stop after the date. Apply the following steps:

- In the style overview panel, click on DATE.
- Add a forward slash to the DELIMITER input box.
- Add a full stop to the SUFFIX input box.

Year

Apply the following steps to add the year to the date element:

- On the style overview panel, select DATE.
- Click on ADD NODE.
- Add the DATE-PART element.
- On the style overview panel, select YEAR from the TYPE dropdown menu.

Month

Apply the following steps to add the month to the date element:

- In the style overview panel, click on DATE.
- Click on ADD NODE.
- Add the DATE-PART element.
- On the style overview panel, select MONTH from the TYPE dropdown menu.

A leading zero must appear before the first non-zero digit in DATE-PART, for example, 2022/01/22 instead of 2022/1/22. Apply the following step to have a leading zero displayed in DATE-PART:

- On the info panel, select NUMERIC-LEADING-ZERO from the FORM dropdown menu.

Day

Apply the following steps to add the day to the date element:

- In the style overview panel, click on DATE.
- Click on ADD NODE.
- Add the DATE-PART element.
- On the style overview panel, select DAY in the TYPE dropdown menu.

A leading zero must appear before the first non-zero digit in DATE-PART for example, 2022/11/02 instead of 2022/11/2. Apply the following steps to have the a leading zero displayed in DATE-PART:

- On the info panel, select NUMERIC-LEADING-ZERO from the FORM drop-down menu.

Store the CSL file.

3.6.   Harvard: conference proceedings published in a book

If you have progressed this far, you can now also edit or create other referencing styles such as Harvard. However, Mendeley and Visual CSL Editor are incompatible with Harvard insofar as they

render incomplete citations for conference proceedings published in a book. The Harvard style for conference proceedings published in a book is as follows:

> Author, Y.T. Year. Paper Title. In: O.P. Author and K.J. Author, eds. *Conference Name, Proceedings Title*. Presented at the *Event Name, Event Dates, Event Location*. Place of Publication: Publisher, Page numbers.

In an instance of Taylor & Francis – Harvard X as the chosen citation style, Mendeley renders this type of citation in a bibliography as follows:

> Dalvit, L., Murray, S., and Terzoli, A., 2008. The Role of Indigenous Knowledge in Computer Education in Africa. *In*: M. Kendall and B. Samways, eds. *IFIP – The International Federation for Information Processing*. Boston, MA: Springer, 287–294.

The following elements are missing from this example:

✓ The conference name (which must be displayed after the title of the proceedings) is missing. As mentioned earlier, Mendeley does not have a field dedicated to the name of a conference.

✓ The conference date(s) and the conference location (which must appear after the conference name) are missing. Mendeley does **not** have fields dedicated to the date(s) and the location of a conference.

Zotero can render these missing elements for the following reasons:

✓ As mentioned earlier, Zotero has a field for the name of a conference that corresponds with the EVENT variable in Visual CSL Editor.

✓ Although Zotero, as in the case of Mendeley, does not have fields dedicated to the date(s) and the location of a conference, these items can be inserted in the EXTRA field. The EXTRA field accommodates data that do not have their own unique fields. The EXTRA field corresponds with the NOTE variable in Visual CSL Editor.

3.6.1. The EXTRA field

In this section, I demonstrate the EXTRA field in Zotero. Apply the following steps:

- Launch Zotero.
- Select the Dalvit et al conference proceedings.
- On the info panel, click inside the EXTRA input box and add the following: "7-10 September 2008, Milano".

3.6.2. The JSON file

To observe if and how data in the EXTRA field are displayed on the example panel in Visual CSL Editor, you have to export metadata from Zotero to Visual CSL Editor in a JSON file. Export the metadata as follows:

- Select the conference proceedings (i.e., the Dalvit et al file) in the centre column and right-click it.
- Select EXPORT ITEM in the dropdown menu.
- Select CSL JSON from the dropdown menu and click on OK.
- Save the file as "conference_metadata" (overwrite the old file).

Remember the location where you save this file because you are going to import the file into Visual CSL Editor shortly.

3.6.3. Invoking Harvard in Visual CSL Editor

Before you import the JSON file, apply the following steps in Visual CSL Editor to open the Taylor & Francis – Harvard X style:

- Click on ABOUT in the upper left corner.
- Type and search for Taylor & Francis – Harvard X in the SEARCH input box.
- Click on EDIT.

3.6.4. Conference metadata as a citation example

In this section, I demonstrate how to have the conference metadata displayed as a citation example. Deactivate all three citation examples on the example panel and then apply the following steps to add the conference metadata as a citation example:

- Click on EXAMPLE CITATION in the upper right corner of the example panel – select CITATION 1.
- Click on RESET ALL CITATIONS TO DEFAULT to remove the PAPER-CONFERENCE citation example.
- Click on ADVANCED.

You will notice an input box; the metadata of *conference_metadata.json* must be added to the input box in order for PAPER-CONFERENCE to be displayed as an example citation. To add the metadata to the input box, you must copy the metadata inside *conference_metadata.json* and paste it into the input box. Apply the next steps to add the metadata:

- Navigate directly to the location on your device where you stored your JSON file.
- Right-click the file and click on OPEN WITH.
- Open the file with Notepad or any other text editor.
- Select and copy all the text; return to Visual CSL Editor and paste the text into the input box.
- Click on ADD NEW REFERENCE to activate PAPER-CONFERENCE.

This new PAPER-CONFERENCE citation example contains the updated metadata captured in the JSON file. Only PAPER-CONFERENCE must be displayed as a citation example on the example panel.

3.6.5. Event

On the example panel, notice that there is a comma after the event variable (the conference name, i.e., after "Learning to live in the knowledge society) – see figure 42.

EXAMPLE BIBLIOGRAPHY

Dalvit, L., Murray, S., and Terzoli, A., 2008. The Role of Indigenous Knowledge in Computer Education in Africa. *In*: M. Kendall and B. Samways, eds. *IFIP International Federation for Information Processing*. Presented at the Learning to live in the knowledge society, Boston: Springer, 287–294.

figure 42

A comma must indeed appear after the event variable (i.e., the conference date and the conference location). However, the comma that is presently displayed is a group delimiter. In this instance, a group delimiter is problematic because it **always** appears after the last item of the group. Therefore, if the conference date and location are added to the group, a comma will appear after the conference location too. A full stop, and not a comma, must appear after the conference location. In the next series of steps, I demonstrate how to remove the group delimiter. Apply the following steps:

- In the style overview panel, click on GROUP (a sub-item of ELSE-IF CHAPTER OR PAPER-CONFERENCE) (see figure 43).

BIBLIOGRAPHY
Layout
  author (macro)
  Group
  locators (macro)
    Conditional
      If article-journal OR artic...
      Else-If article-newspaper
      Else-If bill OR book OR gra...
        Group
          event (macro)
            Conditional
              If event
                presented at (term)
                event (variable)
        publisher (macro)
      Else-If broadcast
      Else-If chapter OR paper-co...
        Group
          event (macro)
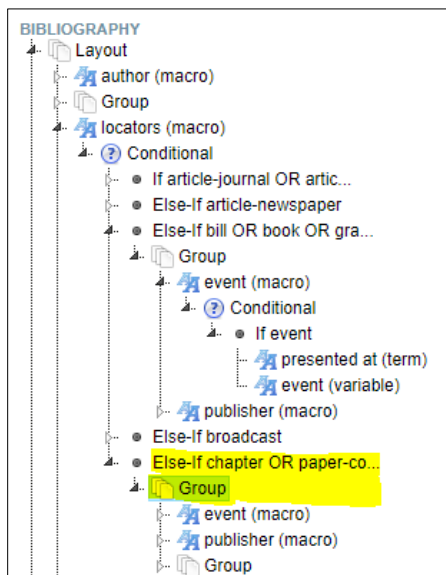   publisher (macro)
          Group

figure 43

- On the info panel, click inside the DELIMITER input box and delete the character space and the comma.

Apply the following steps to reinsert the comma, which must appear after the conference name:

- In the example panel, click on "Learning to live in the knowledge society".
- On the info panel, select TITLE from the TEXT-CASE dropdown menu.
- On the info panel, click inside the SUFFIX input box.
- Type a comma and then press the spacebar key on the keyboard to add a character space.

Earlier, we removed the group delimiter (the comma) between the publisher location and the page numbers. Apply the following steps to reinsert the comma:

- In the example panel, click on "Springer" (i.e., PUBLISHER-PLACE (VARIABLE)).
- On the info panel, click inside the SUFFIX input box.
- Type a comma and press the spacebar key on the keyboard to add a character space.

3.6.6. The conference date and location

The conference date and location must appear after the conference name (event variable). Apply the following steps to add the conference date and location:

- In the example panel, click on "Learning to Live in the Knowledge Society".
- In the style overview panel, click on IF EVENT.
- In the style overview panel, click on ADD NODE.
- Add the TEXT element.
- On the info panel, select VARIABLE from the TYPE dropdown menu.
- Select NOTE from the VARIABLE dropdown menu.

A full stop, followed by a character space, must appear after the conference location. Apply the following steps to add a full stop:

- On the info panel, click in the SUFFIX input box.

- Add a full stop and then press the spacebar key on the keyboard to add a character space.

figure 44 illustrates the desired result.

EXAMPLE BIBLIOGRAPHY

Dalvit, L., Murray, S., and Terzoli, A., 2008. The Role of Indigenous Knowledge in Computer Education in Africa. *In*: M. Kendall and B. Samways, eds. *IFIP International Federation for Information Processing*. Presented at the Learning to Live in the Knowledge Society, 7-10 September 2008, Milano. Boston: Springer, 287–294.

figure 44

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