22 References in Plain Text Writing

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References in Plain Text Writing (Markdown)

Three additional files are required to insert references in Markdown files:

- a file for information about the text format (.yaml),
- a file for bibliographical information (. bib), and
- a file for display format of the bibliographical information (.bib).

Out of these three files only the one containing text format information has to be created manually. Zotero will create the .bib file and the .csl file can be downloaded from the Zotero Style Repository.

Text Format File (.yaml)

The .yaml file controls both the styling of the text and the output format. The file can be given any name. Because the file is responsible for the formatting of the text in this tutorial the file is called format.yaml. The following listing shows an example that uses both a .bib file and a .csl file.

```yaml
# input and output
input-files:
  - my-text.md  # there can be more files
  # - second_part.md
  # - thrid_part.md
output-file: output.pdf

# basic settings
from: markdown
to: pdf
# lualatex is better for special characters
pdf-engine: lualatex # or xelatex, pdflatex

# activate citeproc - responsible for loading the bibliography
```

```yaml
15   citeproc: true
16
17   table-of-contents: true
18
19   # variables und metadata
20   variables:
21     lang: en # for Switzerland: de-CH
22     lof: true
23     lot: true
24     number-sections: true
25     header-includes:
26       - \setcounter{secnumdepth}{3}
27       - \setcounter{tocdepth}{3}
28
29   metadata:
30     title: "Title of the Documnt"
31     author: "Authors Name"
32     date: "Today"
33     bibliography: bibliography.bib
34     csl: chicago-notes-bibliography-access-dates.csl
35     link-citations: true
```

The follwoing list provides explanations for the entries in the configuration file:

- `input-files` A list of the files to be included in the final output. As shown in the example the different files are listed one below the other.
- `output-file` This key sets the path to the output file.
- `from` This is the key of the file format of the `input-files`.
- `to` This is the key of the file format of the `output-file`.
- `pdf-engine` sets the pdf-engine responsible for the conversion from Markdown to PDF. `lualatex` is chosen for its ability to handle Swiss umlaute.
- `citeproc` is the software responsible to handle the bibliographic information. The value `true` activates the software.
- `table-of-contents` If `true` there will be a table of contents.
- `variables` bundles the details for the display of the output file.
- `lang` is the variable to store the language settings. For Swiss German documents it has to be set to `de-CH`. This observes the Swiss German typographical conventions.
- `lof` creates a list of figures.
- `lot` creates a list of tables.
- `number-sections` numbers the sections according to their hierarchical position.
- `header-includes` This key allows the inclusion of LaTeX commands.
- `- \setcounter{secnumdepth}{3}` This numbers sections down to the third level.
- `- \setcounter{tocdepth}{3}` This excludes sections below the third level from the table of contents.
- `metadata` bundles the metadata of the file.

- title The title for the front matter.
- author The author's name. Multiple authors can be provided as a list (analogue to the input files).
- date The Date.
- bibliography Stores the path to the bibliography (.bib) file.
- csl Stores the path to the .csl file.

For additional configurations check the Pandoc User Guide.

Bibliographic Information

Zotero will create the file bibliography.bib automatically. Nevertheless, there is an example entry from the file bibliography.bib below.

```
1  @book{healy2020,
2    title = {The {{Plain Person}}'s {{Guide}} to {{Plain Text Social Science}}},
3    author = {Healy, Kieran},
4    year = 2020,
5    }
```

This entry represents a book, hence the @book key. The citation key can be found immediately after the curly bracket. Zotero assigns this key arbitrarily. However, it is possible to set a citation key at will. The details are explained in **?@sec-zotero_entry**.

Citation Style

The .csl (Citation Style Language) file defines the citation style. The .csl format is a variant of the xml language. Even if it is possible to write a csl definition from scratch it is far easier to download a style from the Zotero Style Repository.

Setting references in Markdown

To transfer references from the .bib file into the Markdown text, use the citation key ([@citation_key]). If you want to include page numbers in your reference, add them to the citation key ([@citation_key, 25]). If you need to include multiple authors in one reference, you can combine multiple citation keys ([@citation_key_1, 25; @citation_key_2, 33]).

There is no need to know memorise the citation keys as Zotero displays them as the first item in the metadata.

Creating a PDF containing references

If there exists a `.yaml` file, the pdf can be created with the

```
1  pandoc -d format.yaml
```

command. The command must be executed from the same directory in wich he `format.yaml` file is located.