Standard Operating Procedure

Number: **022**

Name: **External contents**

Title: Procedure to display citations to external contents on the EU Pollinator Hub

Category: Data life cycle management

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1 Document history

1.1 Current Release

1.1.1 Drafted

Submitted on 2023-06-05 by Michael Rubinigg, quality manager.

1.1.2 Reviewed

Reviewed on 2023-06-30 by Noa Simòn Delso, general manager.

1.1.3 Approved

Approved on 2023-06-30 by Michael Rubinigg, quality manager.

1.2 Change history

n.a.

2 Abbreviations

API	Application Programming Interface
CSL	Citation Style Language
DOI	Digital Object Identifier
EU	European Union
EUPH	EU Pollinator Hub
HTML	Hypertext Markup Language
JSON	JavaScript Object Notation
n.a.	not available
RIS	Research Information Systems
SOP	Standard Operating Procedure
URL	Uniform Resource Locator
XML	Extensible Markup Language

3 Introduction

Managing citations of external contents referenced by the European Pollinator Hub (EUPH) is an important prerequisite for ensuring the quality of the information provided by the EUPH. External contents bibliographies included in datasets as well as on the EUPH.

Citations of external contents only describe external content and do not provide a direct link. For this reason they have a higher stability over time, in particular if they are used as citations in scientific works (publications or datasets), as they are supposed to ensure traceability. For storage, transfer and editing of citations, different standards exist, and different software applications are used to manage citations.

Currently, common standardised tag formats used by editors of scientific journals to transfer citations are BibTeX [1] and RIS (an acronym for Research Information Systems) but many other formats are currently used, among which the Citation Style Language (CSL, https://citationstyles.org/), an open XML-based standard to describe citations and bibliographic information.

Zotero (https://www.zotero.org) is a widely used, free and open-source reference management software. It is able to handle most bibliographic formats, provides open access to most of its source code under the GNU Affero General Public License (version 3) as well as local translations, offers an API that allows read-only access to online Zotero libraries [2], and is compatible with CSL, an open XML-based language to describe the formatting of citations and bibliographies. In order to ensure interoperability, citations on the EUPH will therefore be stored in a way that allows the management of citation formats using Zotero. Citations on the EUPH will be displayed using an internal format described in the current SOP.

3.1 Definitions

Citation is defined as a standardised description of external content.

External content is defined as a resource that is not physically present on the EUPH.

Link is defined as a digital reference, embedded in the text of a hypertext markup language (HTML) document, pointing to external content, that a reader can immediately access.

Reference list is defined as a bibliographic index of external references in a document.

3.2 Citations

4 Validity

4.1 Area

The of validity of this document is limited to the management of citations of external contents referenced by the European Pollinator Hub (EUPH).

4.2 Time

The period of validity of this SOP begins on 2023-06-30 and ends with its revocation.

4.3 Related Documents

Document type	Number	Name
SOP	001	SOP instructions
SOP	004	Organisation chart
WI	008	Link directory

4.4 Related Tasks

Persons who have been assigned one of the following tasks, as defined in SOP-004, assume a responsibility within this SOP:

- Content management

5 Procedure

5.1 Responsibilities

- The person responsible for content management, as defined by SOP-004. Is responsible for all processes described in this SOP.
- The task of carrying out certain parts of this process can be transferred to another person.

5.2 Citations on the EUPH

5.2.1 Citations in documents created by EUPH software

5.2.1.1 General rules

- Each citation in the text appears on the line, in square brackets inside the punctation.
- If more than one citation is inserted in the text, citations are separated by a comma, appearing on the line, in square brackets inside the punctation.

5.2.1.2 Numeric citations in text

- For citations appearing as number, integer numbers are used starting at 1.

5.2.1.3 Author-Year snippets citation in text

- For citations appearing as author-year snippets, the following information is displayed, where blank spaces are given as underscore (_), words to be printed as such are **bold**, field types (in italics) and their description (appearing after a colon) are placed within square brackets.

  {[*author*: last name]_[**et_al.**]_[*issued*: year][letter **a** through **z**]}

- The names of one creator must be listed. If there is more than on name listed, or if names in addition to the first author's name are not provided, the primary author's name followed by ***et al.***, written in *italics*, is used.
- If more than one reference from the same first author in the same year exists in the reference list, the letters following the publication date is displayed.
- If no author names are available, editor names may be used instead of author names.
- If no creator names are available, **Anonymous** is displayed where author names are displayed.

5.3 Reference lists on the EUPH

5.3.1 General rules

5.3.1.1 Style

- References are stored as plain text in CSL JSON format as described in WI-007.

5.3.1.2 Reference numbers

- Reference numbers are set flush left and form a column of their own, hanging out beyond the
- body of the reference.
- Reference numbers are on the line, enclosed in square brackets.

5.3.1.3 General format description

- In the following format description spaces are given as underscore (_), words to be printed as such are **bold**, field types (in italics) and their description (appearing after a colon) are placed within square brackets, elements belonging together are enclosed by curved brackets and alternative variants are separated by |.

```
{[author: last name]_[author: given first name abbreviated to the first
letter]{[author: given middle name abbreviated to the first letter]}{,_|_}}
{{[issued: year][letter a through z]}_}}
{[title]._}
{([language])_}
{[genre]._}
{{In:_|}[container-title: to be displayed in italics]._}
{Vol._[volume],_}
{([issue])_}
{Ed._[editor: last name]_[editor: given first name abbreviated to the first
letter]{[editor: given middle name abbreviated to the first letter]}{,_|_}}
{[edition]._ed._}
{[publisher]._}
{{p._[page: lower range]}|{pp._[page: lower range]-[page: upper range]}._}
{{<a          href='[URL]'>doi:_[DOI]</a>}|{[[accessed:          YYYY-MM-DD]]_<a
href='[URL]'>[URL: domain].[URL: top level domain]</a>}}
```

5.3.1.4 List of creator names

- The general format for creator names (persons or institutions) stored in *creator type* are written as follows:
  - In the case of physical persons, the last name of each creator is displayed first, followed by the given first and middle names of the creators, abbreviated to the initial without dots.
  - Creator names are separated by a comma.
  - The names of all creators must be listed, up to six names. If there are more than six names listed, or if names in addition to the primary author's name are not provided, the primary author's name followed by ***et al.***, written in *italics*, is used.

- If no author names are available, editor names may be used instead of author names.
- If no creator names are available, **Anonymous** is displayed where author names are displayed.

5.3.1.5 Publication dates

- Publication dates stored in field type *issued* are formatted in the following order: year, month, day (YYYY-MM-DD).
- For any reference extending over a period of more than one day (*e.g.* conferences), redundant information is displayed only once, and the start and end date of non-redundant information is separated by a forward slash (*e.g.* 2014-07-12/17).
- If the same first author has more publications in the same year or the same period, a letter a through z follows the publication date.

5.3.1.6 Publication title

- Publication titles (stored in field type *container-title*) are displayed in *italics*.

5.3.1.7 Page information

- Page information is stored in field type *page*.
- If one page or the total number of pages is cited, information is preceded by **p.** written in italics (including dot).
- If more than one pages are cited, information is preceded by **pp.** written in italics (including dot) and the lower and the upper range are separated by a hyphen without space between hyphen and page number.

5.3.1.8 Digital Object Identifier

- If there is a Digital Object Identifier (stored in field type *DOI*) included with the print reference, it is included at the end of the reference, preceded by **doi:** (including colon).
- If a reference contains both a DOI and an URL for the DOI, the DOI is embedded in a hyperlink in an HTML document, pointing to the URL and targeting a new window or tab in the browser.
- If a reference contains both a DOI and an URL which does not point to the DOI, the URL is not displayed.

5.3.1.9 Uniform Resource Locator

- If there is a Uniform Resource Locator (URL, stored in field type *URL*) included with the print reference, it is included at the end of the reference and is preceded by the access date.
- Only domain and top-level domain of the URL are displayed as embedded hyperlink, pointing to the URL and targeting a new window or tab in the browser.

- Access dates (stored in field type *accessed*) are enclosed in square brackets and are formatted in the following order: year, month, day (YYYY-MM-DD).

5.3.1.10 End of a reference

- All references, except those ending with URL and DOI, end with a period.
- All references end with a link to a full list of all available bibliographic information of the reference.

5.3.2 Specific rules publication types

Table 1. List and sequence of elements of CSL creator types and CSL field types to be provided for different elements of CSL item types in a reference list.

		item type														
		book	**chapter**	**software**	**paper-conference**	**dataset**	**entry-dictionary**	**document**	**entry-encyclopedia**	**article-journal**	**report**	**standard**	**legislation**	**thesis**	**webpage**	**rest**
creator type	**author**	X	X		X	X	X	X	X	X	X	X	X	X	X	X
	issued	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	title	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	language	X	X		X	X	X	X	X	X	X	X	X	X	X	X
	genre					X					X	X		X	X	
	container-title		X		X		X		X	X					X	
	volume	X	X		X		X		X	X						
	issue									X						
creator type	**editor**		X				X		X							
field type	**edition**	X	X				X		X							
	publisher	X	X	X	X	X	X	X	X		X	X		X		
	page		X		X		X		X	X	X		X			
	DOI				X	X				X		X				
	accessed	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
	URL	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X

5.3.2.1 Books

- Information on item type *book* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year of publication (field type *issued*) as described in section .
    - Title of the book (field type *title*) followed by a dot.
    - If the language is not English full language name based on field *language* enclosed in round brackets.
    - **Vol.** followed by volume (field type *volume*) followed by a comma.
    - Number of edition (field type *edition*) followed by a dot, followed by ***ed.*** written in italics (including dot).
    - Name of the publisher (field type *publisher*) followed by a dot.

    - URL (field type *URL*) preceded by the accessed date (field *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[1] Author-One AB, Author-Two C-D 2023 Book title. (Spanish) Vol. 1, 3. ed. Publisher name. p. 123. [2023-02-02] domain.tld

5.3.2.2 Book section

- Information on item type *chapter* (Table 1) is provided in the following sequence (if available):
    - creator type
        - List of authors as described in section 5.3.1.4.
    - field type
        - Year of publication (field type *issued*) as described in section .
        - Title of the chapter (field type *title*) followed by a dot.
        - If the language is not English full language name based on field type *language* enclosed in round brackets.
        - **In:** followed by book title (field type *container-title*) written in *italics* followed by a dot.
        - **Vol.** followed by volume (field type *volume*) followed by a comma.
    - creator type
        - **Ed.** followed by the list of editors as described in section 5.3.1.4 followed by a comma.
    - field type
        - Number of edition (field type *edition*) followed by ***ed.*** written in italics (including dot).
        - Name of the publisher (field type *publisher*) followed by a dot.
        - Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
        - URL (field *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[2] Author-One AB, Author-Two C-D 2023 Chapter title. (Spanish) In: *Book title*. Vol. 1, Ed. Editor-One AB, Editor-Two C-D, 3. ed. Publisher name. p. 123. [2023-02-02] domain.tld

5.3.2.3 Software application

- Information on item type *software* (Table 1) is provided in the following sequence (if available):
    - field type
        - Name of the software application (field type *title*) written in *italics* followed by a dot.

- Year of release (field type *issued*) as described in section .
- Name of the producer (field type *publisher*) followed by a dot.
- URL (field *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.

- Example:

[3] Software application 2023 Producer name. [2023-02-02] domain.tld

5.3.2.4 Conference paper

- Information on item type *paper-conference* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year, month of conference (field type *issued*) as described in section .
    - Title of the conference paper (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - **In:** followed by the title of the conference proceedings (field type *container-title*) written in *italics* followed by a dot.
    - **Vol.** followed by volume (field type *volume*) followed by a comma.
  - creator type
    - **Ed.** followed by the list of editors as described in section 5.3.1.4 followed by a comma.
  - field type
    - Name of the publisher (field type *publisher*) followed by a dot.
    - Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
    - DOI (field type *DOI*) as described in section 5.3.1.8
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[4] Author-One AB, Author-Two C-D 2023 Jan. Conference paper title. (Spanish) In: *Conference proceedings*. Vol. 1, Ed. Editor-One AB, Editor-Two C-D, Publisher name. p. 123. doi: 10.12345/euph

[5] Author-One AB, Author-Two C-D 2023 Jan. Conference paper title. (Spanish) In: *Conference proceedings*. Vol. 1, Ed. Editor-One AB, Editor-Two C-D, Publisher name. p. 123. [2023-02-02] domain.tld

5.3.2.5 Dataset

- Information on item type *dataset* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year, month of publication (field type *issued*) as described in section .
    - Title of the dataset (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - Type of the dataset (field type *genre*) followed by a dot.
    - Name of the publisher (field type *publisher*) followed by a dot.
    - DOI (field type *DOI*) as described in section 5.3.1.8
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[6] Author-One AB, Author-Two C-D 2023 Feb. Dataset title. (Spanish) Publisher name. doi: 10.12345/euph

[7] Author-One AB, Author-Two C-D 2023 Feb. Dataset title. (Spanish) Publisher name. [2023-02-02] domain.tld

5.3.2.6 Dictionary entry

- Information on item type *entry-dictionary* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year of publication (field type *issued*) as described in section .
    - Title of the dictionary entry (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.

- **In:** followed by dictionary title (field type *container-title*) written in *italics* followed by a dot.
- **Vol.** followed by volume (field type *volume*) followed by a comma.

- creator type
  - **Ed.** followed by the list of editors as described in section 5.3.1.4 followed by a comma.
- field type
  - Number of edition (field type *edition*) followed by ***ed.*** written in italics (including dot).
  - Name of the publisher (field type *publisher*) followed by a dot.
  - Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
  - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.

- Example:

[8] Author-One AB, Author-Two C-D 2023 Entry title. (Spanish) In: *Dictionary title*. Vol. 1, Ed. Editor-One AB, Editor-Two C-D, 3. ed. Publisher name. p. 123. [2023-02-02] domain.tld

5.3.2.7 Document

- Information on item type *document* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year, month of publication (field type *issued*) as described in section .
    - Title of the document (field type *title*) followed by a dot.
    - Name of the publisher (field type *publisher*) followed by a dot.
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[9] Author-One AB, Author-Two C-D 2023 Mar. Document title. (Spanish) Publisher name. [2023-02-02] domain.tld

5.3.2.8 Encyclopedia article

- Information on item type *entry-encyclopedia* (Table 1) is provided in the following sequence (if available):
  - creator type

    - List of authors as described in section 5.3.1.4.
- field type
    - Year, month of publication (field type *issued*) as described in section .
    - Title of the article (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - **In:** followed by encyclopedia title (field type *container-title*) written in *italics* followed by a dot.
    - **Vol.** followed by volume (field type *volume*) followed by a comma.
- creator type
    - **Ed.** followed by the list of editors as described in section 5.3.1.4 followed by a comma.
- field type
    - Number of edition (field type *edition*) followed by ***ed.*** written in italics (including dot).
    - Name of the publisher (field type *publisher*) followed by a dot.
    - Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[10] Author-One AB, Author-Two C-D 2023 Apr. Article title. (Spanish) In: *Encyclopedia title*. Vol. 1, Ed. Editor-One AB, Editor-Two C-D, 3. ed. Publisher name. p. 123. [2023-02-02] domain.tld

5.3.2.9 Journal Articles

- Information on item type *article-journal* (Table 1) is provided in the following sequence (if available):
    - creator type
        - List of authors as described in section 5.3.1.4.
    - field type
        - Year of publication (field type *issued*) as described in section .
        - Title of the article (field type *title*) followed by a dot.
        - If the language is not English full language name based on field type *language* enclosed in round brackets.
        - Journal title (field type *container-title*) written in *italics* .
        - Volume (field type *volume*).

- Issue (field type *issue*) enclosed in round brackets.
- Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
- DOI (field type *DOI*) as described in section 5.3.1.8
- URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.

- Example:

[11] Author-One AB, Author-Two C-D 2023 Article title. (Spanish) *Journal title* 1 (2) pp. 123-234. doi: 10.12345/euph

[12] Author-One AB, Author-Two C-D 2023 Article title. (Spanish) *Journal title* 1 (2) pp. 123-234. [2023-02-02] domain.tld

5.3.2.10 Report

- Information on item type *report* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year, month of publication (field type *issued*) as described in section .
    - Title of the report (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - Type of the report (field type *genre*) followed by a dot.
    - Name of the institution (field type *publisher*) followed by a dot.
    - Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[13] Author-One AB, Author-Two C-D 2023 May. Report title. (Spanish) Report type. Institution name. pp. 123-234. [2023-02-02] domain.tld

5.3.2.11 Standard

- Information on item type *standard* (Table 1) is provided in the following sequence (if available):
  - creator type

- List of authors as described in section 5.3.1.4.
- field type
  - Year, month of publication (field type *issued*) as described in section .
  - Title of the standard (field type *title*) followed by a dot.
  - If the language is not English full language name based on field type *language* enclosed in round brackets.
  - Type of the standard (field type *genre*) followed by a dot.
  - Name of the publisher (field type *publisher*) followed by a dot.
  - DOI (field type *DOI*) as described in section 5.3.1.8.
  - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[14] Maintenance agency 2023 Jun. Standard title. (Spanish) Publisher name. doi: 10.12345/euph

[15] Maintenance agency 2023 Jun. Standard title. (Spanish) Publisher name. [2023-02-02] domain.tld

5.3.2.12 Statute

- Information on item type *legislation* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year, month enacted (field type *issued*) as described in section .
    - Name of the act (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - Range of pages (field type *page*) separated by a hyphen followed by a dot as described in section 5.3.1.6.
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[16] Legislator 2023 Jul. Act name. (Spanish) pp. 123-234. [2023-02-02] domain.tld

5.3.2.13 Thesis

- Information on item type *thesis* (Table 1) is provided in the following sequence (if available):

- creator type
  - Author as described in section 5.3.1.4.
- field type
  - Year, month published (field type *issued*) as described in section .
  - Title of the thesis (field type *title*) followed by a dot.
  - If the language is not English full language name based on field type *language* enclosed in round brackets.
  - Type of the thesis (field type *genre*) followed by a dot.
  - Name of the university (field type *publisher*) followed by a dot.
  - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[17] Author-One AB 2023 Aug. Thesis title. (Spanish) PhD thesis. University name. [2023-02-02] domain.tld

5.3.2.14 Webpage

- Information on item type *website* (Table 1) is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year, month published (field type *issued*) as described in section .
    - Title of the webpage (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - Type of the website (field type *genre*) followed by a dot.
    - Website title (field type *container-title*) written in *italics* followed by a dot.
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[18] Author-One AB, Author-Two C-D 2023 Sep. Webpage title. (Spanish) Website type. *Website title*. [2023-02-02] domain.tld

5.3.2.15 Rest

- Information on all other elements of item type, referred to as *rest* in Table 1 is provided in the following sequence (if available):
  - creator type
    - List of authors as described in section 5.3.1.4.
  - field type
    - Year published (field type *issued*) as described in section .
    - Title of the publication (field type *title*) followed by a dot.
    - If the language is not English full language name based on field type *language* enclosed in round brackets.
    - Type of the item (field type *item type*) followed by a dot.
    - URL (field type *URL*) preceded by the accessed date (field type *accessed*) of the reference as described in section 5.3.1.8.
- Example:

[19] Author-One AB 2023 Publication title. (Spanish) Video recording. [2023-02-02] domain.tld

5.4 Citations in datasets

5.4.1 Data

5.4.1.1 Recommendations

- If citations of external references are included in the data of a dataset, it is recommended to provide the following information:
  - The DOI of the external reference, OR
  - The type of the format, AND
  - The citation in the specified format type, stored as plain text.
- Creation and processing of citations is described in section 5.5.

5.4.2 Metadata

5.4.2.1 Recommendations

- If external references are included in the metadata of a dataset, it is recommended to provide the following information:
  - The DOI of the external reference, OR
  - The type of the format, AND
  - The citation in the specified format type, stored as plain text.
- Creation and processing of citations is described in section 5.5.

5.5 Creating and processing citations

5.5.1 Creating and processing citations on the EUPH

5.5.1.1 Citation creation module

- Citations are created as described in WI-007.

5.5.2 Creating and processing citations by external applications

5.5.2.1 Creating citations by external application

- Citations are created and processed as described in WI-007.

6 References

[1] L. Lamport, The LaTeX companions. Bind 4 : LaTeX : a document preparation system, user's guide and reference manual (Bookmarked), Addison-Wesley, 2001.

[2] Zotero, "Zotero," Corporation for Digital Scholarship, [Online]. Available: https://www.zotero.org. [Accessed 23 05 2023].

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7 Annexes

There are no annexes in the current document.