

# Biblioscope 8 - User Manual

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Research Information Manager



# Bibioscape User Manual

## Research Information Manager

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*by CG Information*

*Bibioscape is designed to help researchers collect and manage bibliographic data, take notes while doing research, and generate citations and bibliographies for publication. Bibioscape Professional can compile your notes into a final draft with a table of contents and an index. Bibioscape Librarian can be used to manage a small library. You can use Bibioscape to manage all your research information.*

# Biblioscape 8 - User Manual

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## Foreword

Bibioscape is an information manager for researchers, scholarly writers, students, and librarians. It is used to organize literature references, research notes, automatically generate citations and bibliographies, search and capture bibliographic data on the Internet, compile notes into a final draft with a table of contents, and to post bibliographic databases live on the web.



# Introducing Biblioscape

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



# 1 Introducing Biblioscape

Biblioscape is designed with one goal in mind, and that is to help researchers manage different kinds of research-related information more efficiently. After 7 major releases, Biblioscape has evolved from a traditional bibliographic software into a research information manager. Biblioscape will help researchers organize all kinds of research related information in a single place, and link them together to build a knowledge base. It consists of several modules addressing different aspects of a researcher's needs. This book will explain all the main tools that are in Biblioscape and give practical advice on how to get the most out of the program. It also offers tips on how to setup your database for both individual use and group use.

Biblioscape was built to handle a very large number of records of different types. This is reflected in the way Biblioscape separates the various tasks into individual modules. Before we go into detail, let's first examine the basic concepts of Biblioscape. Then we can move on to an overview of all the main features.

## 1.1 What is Biblioscape?

Biblioscape is a software package that helps an individual or a group of users collect, manage, and publish research information. When it was first released in 1998, Biblioscape could only manage references. Over the years, more modules have been added to manage other types of information. These include notes, tasks, idea charts, libraries, categories, and compositions. The Biblioscape team has been looking closely at how researchers work digitally and the problems they face when processing large numbers of research literature. The latest release of Biblioscape is the result of this research. Biblioscape is not so much a single, monolithic application, but instead is a suite of application modules that combine to provide an ideal workflow for researchers.

### 1.1.1 Keeping things integrated

One of the early goals of the Biblioscape team was to provide an integrated tool for researchers. In the early days, references were managed by a bibliographic software, and ideas and notes were stored in a Personal Information Manager (PIM), while the actual writing of a paper, a thesis, or a book was done in a word processor. Information had to be copied and pasted between these applications. Searches had to be done in more than one application to ensure nothing is missed. Correction in your references or notes databases would not be reflected in your final writings unless you manually make the changes.

Biblioscape aims to provide researchers with the tools they most need and eliminate the call for complicated workarounds. You will find that for the most part, Biblioscape has managed to do this. It allows you to annotate a reference while reading the full text, and use your annotations later in

a draft. When you write, all the references you collected are right on the screen. You can just drag and drop references to the place you wish to cite. There is no need to worry about the formatting of references; Biblioscape will handle that automatically when you are done writing. Biblioscape tries to provide an integrated environment for researchers, so all the information collected and produced for your research is stored in one database. This will make the most efficient workflow possible.

### 1.1.2 Modular design

Biblioscape was first created as a reference manager. More features were added later to handle tasks related to user reference collections. Biblioscape is composed of individual, self-contained modules built around a core that contains a powerful reference importing and formatting engine. Each module offers a unique set of functions. Biblioscape has seven modules: References, Notes, Categories, Tasks, Charts, Composition, and Library. This modular approach makes it easier in the future to add new features and to maintain them. For example, if at some point it is decided that Biblioscape needs a publication submission manager, a new self-contained module may be added.

- The References module is used to capture and manage bibliographic references. Bibliographic records from different sources can be imported into a Biblioscape database with the right import filter. References are stored in folders, organized using collections, and tagged by categories. Biblioscape will convert your temporary citations into formatted citations and bibliographies according to your selection from 2,000 plus pre-made styles.
- The Notes module is designed to collect any free text information in your research. Notes can be annotations of a published work, ideas, comments, background information about a journal article, a topic, an author, etc. Notes are organized in a tree structure. A note can be linked to other notes, references, tasks, etc.
- The Categories module has two main functions. The Categories pane is displayed on the right in other modules. Users can easily tag references and notes by dragging and dropping selected records into a categories list or tree. For advanced users, categories can be used to represent topics and relationships between topics. Therefore, you can use it to build a knowledge map and integrate with the rest of your database.
- The Tasks module is a simple To Do list manager that is integrated with the References and Notes modules. It is designed to manage tasks related to your research, so you won't need a separate program for it. Tight integration with other modules of Biblioscape make it an ideal tool to manage research related tasks.
- The Charts module can be used to draw flow charts, organization charts, etc. You can draw a chart to express ideas and procedures in your research, and link objects in your chart to

records from other modules in Bibioscape.

- The Composition module is designed to help users write theses or books in a natural way. Instead of having your whole writing project saved in a single word document, you can assemble notes of annotations, ideas, comments, etc. into an outline. The writing structure can be easily re-arranged with drag and drop. Upon completion, Bibioscape will automatically generate a final draft with a Table of Contents, formatted citations and a bibliography, a suggested reading list, a glossary, and an index.
- The Library module is for managing a small research library. It could be a researcher's personal library, a department library, even a small corporate library. It includes 7 sub-modules to handle different tasks in library automation. These are: Catalog, Serials, Circulation, Interlibrary Loan, Borrowers, Lenders, and Suppliers.

Bibioscape also includes a web server application, BiblioWeb. With just one click, your bibliographic database can be published on the Web. Web users can be assigned Read or Write privileges to browse, search, even add and delete bibliographic records using a Web browser. This is the easiest way for a research group to share a common bibliographic database on the Web.

### **1.1.3 Bibioscape performance**

Bibioscape is built on top of a high performance database engine. As long as your computer is not older than 10 years, you will have all that's needed to get started with the program. As your database grows in size, you will find that Fast Search performance doesn't degrade much. For individual users, it is rare to see a database collection of more than 10,000 records. Bibioscape is designed to handle databases much bigger than that. We have tested a database with hundreds of thousands of records with good results. What sets Bibioscape apart from other bibliographic software is the support of group use. The included BiblioRemote database server can be used to support a group of users from different locations to access a shared database. For the references table, it takes about 1 MB of disk space to store 100 references. So if you have a collection of 10,000 references, it will take 100 MB. If lots of your records have full text or attached PDF files, the database size will increase accordingly.

### **1.1.4 Who Bibioscape is designed for**

Bibioscape is designed for anyone who needs to collect references, annotate published works, write research papers, theses, and books. Graduate students will benefit the most from using Bibioscape. As they have just started their research career without much legacy data, putting all their research related data in a single Bibioscape database will save lots of time and effort in a

future career. College professors and corporate scientists will also benefit from using Biblioscape. They usually have a large amount of data scattered in many places. Having a combined database for all their research will increase productivity in many areas. Multi-user support in Biblioscape makes it possible for many researchers to share a common database. This will promote cooperation, discussion, and discovery among group members.

### 1.1.5 **Bibilioscape Workflow**

Workflow is a new buzz word that is appearing everywhere. It depicts a sequence of operations used to accomplish a work, and in Biblioscape, it is defined as how an information object like a reference or note is captured, organized, edited, annotated, linked, used, and finally published in your writings.

#### [What is a workflow?](#)

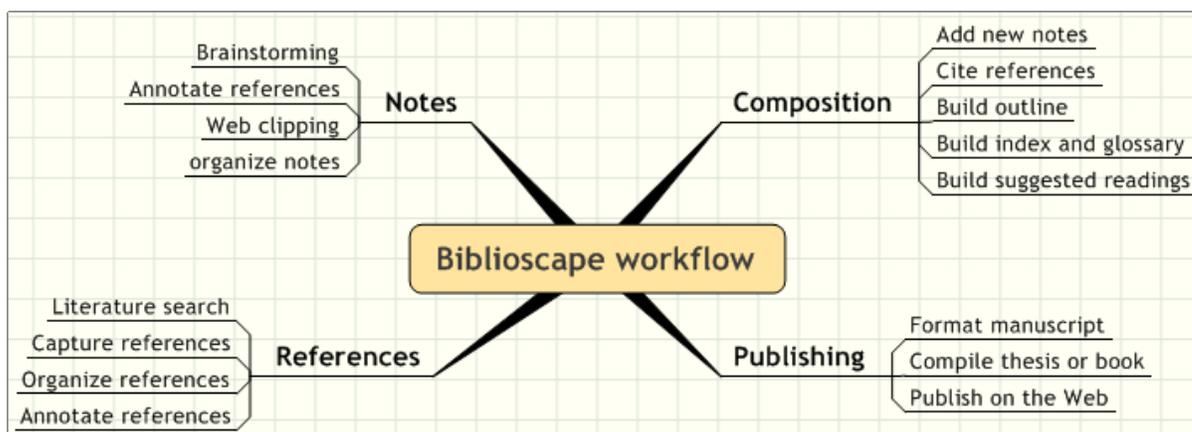
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Here is the definition of workflow from wikipedia: A workflow is a depiction of a sequence of operations, declared as work of a person, work of a simple or complex mechanism, work of a group of persons, work of an organization of staff, or machines. In the manufacturing industry, the term "production workflow" is used, and in document intensive industries such as insurance and health care, there is a document workflow. Overall, people who understand their business inside and out will try to define and describe each step in "workflow" as it applies to them.

#### [A workflow for Biblioscape users](#)

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For a researcher, the process of searching literature, capturing references to your database, annotating your references, brainstorming for ideas, outlining your notes, and finally publishing your writing can be a very complex process as well. In the case of a graduate student writing a thesis, or a researcher writing a book, it may take a couple of years, so the term workflow can also be applied to managing your references and notes. As with every workflow, a Biblioscape user's workflow contains several steps.



*Bibioscape workflow*

1. Collect: References are collected mainly by Internet search. Bibioscape allows users to search 2,700 plus university and public libraries, as well as commercial citation databases, while the search results are directly captured in your database. Users can also search in a web browser and use EndNote Direct Export to capture references directly into your database, and when surfing the web, users can capture web clippings directly into a notes folder.
2. Manage: The first step in managing is to put new records into the right folder. As your collection grows, you can tag records with categories, link records to other records, and define a link relationship. Notes can be reused in a new virtual folder and have different parent-child relationships and ordering. It is also possible to save any search to the folder tree as a search folder.
3. Publish: You can use your favorite word processor to write your papers, and insert Bibioscape temporary citations whenever you need to cite a reference. Before submitting to a publisher, Bibioscape can be used to generate the final draft with formatted citations and a bibliography, and BiblioWeb makes publishing your database on the web easy, so your reference collection can be shared with others.

## 1.2 The evolution of Bibioscape

Bibioscape was first released at the beginning of 1998. For the first 3 major releases, Bibioscape was designed just as a bibliographic tool to generate citations and a bibliography. There were about 10 other bibliographic software products on the market doing nearly the same thing. Most of them were first released in the early 80's DOS era. Bibioscape introduced two new features to bibliographic software - web access and organizing references by folders. Starting from version 4, several new modules were added. The most significant addition is the notes module. Up until version 4, Bibioscape used Borland Database Engine (BDE) to store and access the data.

Biblioscape 5 uses a new database engine. Unlike BDE, the new database engine won't let you use different databases as the back-end, but group use on the Local Area Network (LAN) or even over the Internet becomes much easier to set up. Biblioscape 6 changes are mostly in the formatting engine: It brought Biblioscape to the same level as the leading bibliographic software EndNote in the formatting area, so users from the soft sciences fields are now much better served. Biblioscape 7 improvements concentrate on the area of usability. The changes are in all levels from database structure to the user interface. The Categories module is introduced as the new way to organize and classify records from all other modules. In Biblioscape 8, getting references into your database has become very easy with Online Search. Reference full text in PDF or HTML can be viewed inside Biblioscape. Notes visioning support was added. The improved composition module will let you re-use notes easily to write a thesis or book.

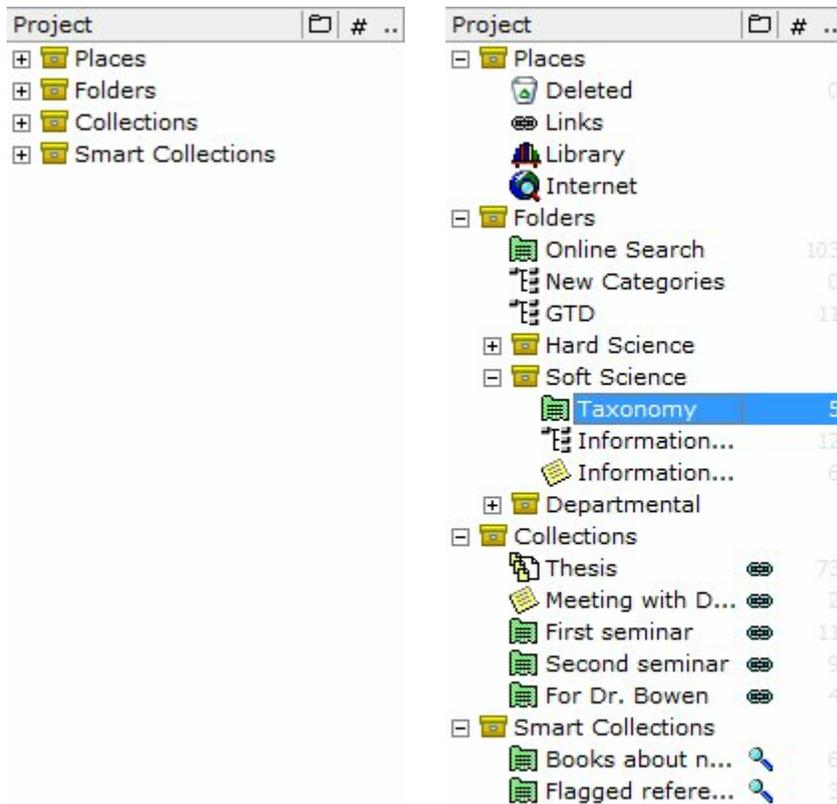
### 1.2.1 What's new in Biblioscape 8

Built on top of the milestone version 7 release, some interesting features have been added to make adding new references very easy. I will briefly describe the major changes under the following sections:

#### Projects

---

- The folder panel is now called "Projects". Under the projects panel, users can add folders as well as collections. A record (reference, note, etc.) can reside only under one folder, but can be included in many collections. Both folders and collections are designed to represent a research project you need to work on.
- Inside the projects panel, you can go to all the following modules: references, notes, tasks, charts, categories, composition, library, deleted, links, and Internet.
- After clicking on a folder or collection, Biblioscape will display the number of records under that folder or collection so you can easily see how many records are under each folder and collection.

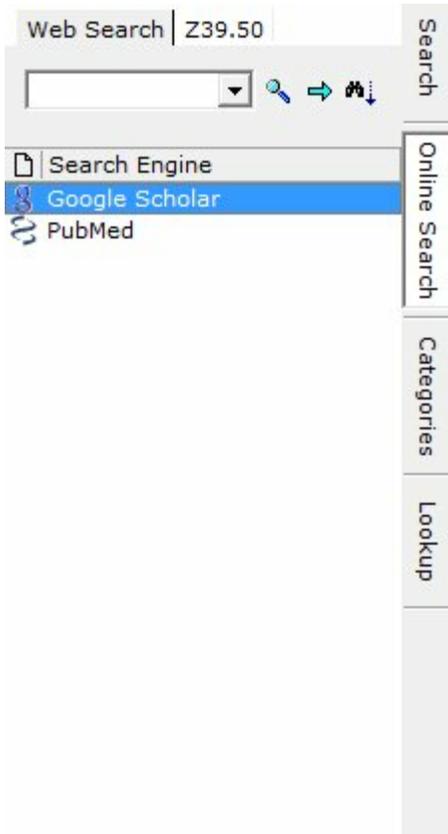
*Projects closed**Projects opened*

## References

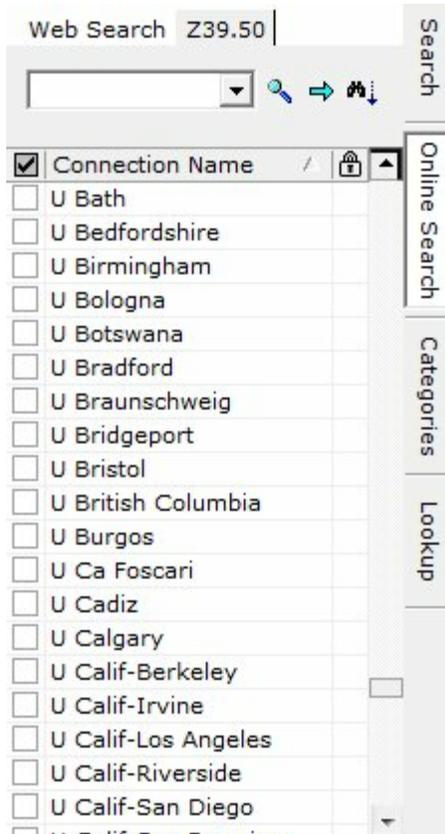
- The Online Search tab has been added, and searching and capturing references has become very simple. Under the "Web Search" tab, two popular search engines are included: Google Scholar and PubMed Medline. Under the "Z39.50" tab, more than 2,000 sites are included, most of which are university library catalogs. For both "Web Search" and "Z39.50" search, users only need to enter a search string; the hits will be captured automatically into the "Online Search" folder. Users can then drag and drop them into other folders.
- When users browse to a reference, Biblioscape will automatically look for the full text of the selected reference using major search engines.
- When users browse a reference, Biblioscape will automatically look for related references of the selected reference using major search engines.
- If the full text of the selected reference is available, it will be displayed inside Biblioscape whether the file is in PDF or HTML format.
- The following fields have been added to the reference table: Original\_pub, Custom\_date,

Custom\_number.

- Users can now organize references under a folder or collection in a parent-child relationship. For example, you can put all book chapter references under the book reference.



*Web Search includes major search engines for citation databases*



*Z39.50 Search includes 2,000 plus university and public library catalogs*

Year	Authors	Title
2008	Salamanca, J.; Nevado, M.; Martin...	Undifferentiated carcinoma of the jejunum with extens...
2008	Yeh, C. J.; Chuang, W. Y.; Chou, H...	Multiple extragenital adenomatoid tumors in the meso...
2009	Gulec, S. A.; Pennington, K.; Hall, ...	Preoperative Y-90 microsphere selective internal radia...
2008	Strillacci, A.; Griffoni, C.; Sansone,...	MiR-101 downregulation is involved in cyclooxygenase...
1996	Krengel, U.; Dijkstra, B. W.	Three-dimensional Structure of Endo-1, 4- $\beta$ -xyl...
1997	Harris, G. W.; Pickersgill, R. W.; C...	Structural Basis of the Properties of an Industrially Rel...

Created: 1/11/2009 Trial User    Ref Type: Journal Article  
 Modified: 1/11/2009 Trial User    ID: Folder: 244 in: Online Search

6 / 9    78.7%    Find

Figure 5. Sketch of the interactions in the active site of

Figure 6. Relative activity of *A. niger* xylanases I (continuous line) and II (broken line; 48% sequence identity) at various pH values (substrate, 1% (w/v) oat spelt xylan (Serva); incubation temperature, 40°C; incubation time, ten minutes; buffer, phosphate/acetate, 50 mM each; Gist-Brocades, unpublished results, with permission).

8.50 x 11.00 in

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A PDF file in the Attachment field will be displayed inside Biblioscape.

Year	Authors	Title
1994	AUMEIER, S. E.; LEE, J. C.; CRIBLE...	Cross-section parameterization using irradiation time ...
	Ebraheem, KAK; Webb, G. A.	Calculation of some Boron Nuclear Screening Constants
2002	Music, D.; Kreissig, U.; Chirita, V.; ...	Elastic modulus of amorphous boron suboxide thin film...
2000	Cioslowski, J.; Schimeczek, M.; Liu...	A set of standard enthalpies of formation for benchma...
2005	Bothe, K.; Sinton, R.; Schmidt, J.	Fundamental boron-oxygen-related carrier lifetime lim...
2002	Malac, M.; Egerton, R. F.	Calibration Specimens for Determining Energy-Disper...

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J. Chem. Phys. / Volume 113 / Issue 21 / ARTICLES / Theoretical Methods and Algorithms

**A set of standard enthalpies of formation for benchmarking, calibration, and parametrization of electronic structure methods**

J. Chem. Phys. 113, 9377 (2000); DOI:10.1063/1.1321306

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 What's New in the Abstra  
 You are not logged in to t

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A web page in the URL field is displayed inside Biblioscape. Biblioscape searches the Web for the full text automatically and displays it in the URL or PDF tab.

Year	Authors	Title
1997	Bajpai, P.	Microbial xylanolytic enzyme system: properties and a...
1993	Zygmunt, L. C.; Paisley, S. D.	Enzymatic method for determination of (1-->3)(1-->4)...
1992	Luthy, R.; Bowie, J. U.; Eisenberg, D.	Assessment of protein models with three-dimensional ...
1993	Thomson, J. A.	Molecular biology of xylan degradation
1992	Godzik, A.; Kolinski, A.; Skolnick, J.	Topology fingerprint approach to the inverse protein f...
1992	Chothia, C.	Proteins. One thousand families for the molecular biol...

Created: 4/15/2007 ChenPaul Ref Type: Journal Article  
 Modified: 1/11/2009 Trial User ID: Folder: 10 in: Xylanase homology

← →

[Recognition of errors in three-dimensional structures of proteins](#)  
 MJ Sippl - Proteins: Struct. Funct. Genet, 1993 - doi.wiley.com  
 ABSTRACT A major problem in the determination of the three-dimensional structure of proteins concerns the quality of the structural models obtained from the interpretation of experimental data. New developments in X-ray ...  
[Cited by 663](#) - [Related articles](#) - [Web Search](#) - [Import into BibTeX](#) - [BL Direct](#) - [All 3 versions](#)

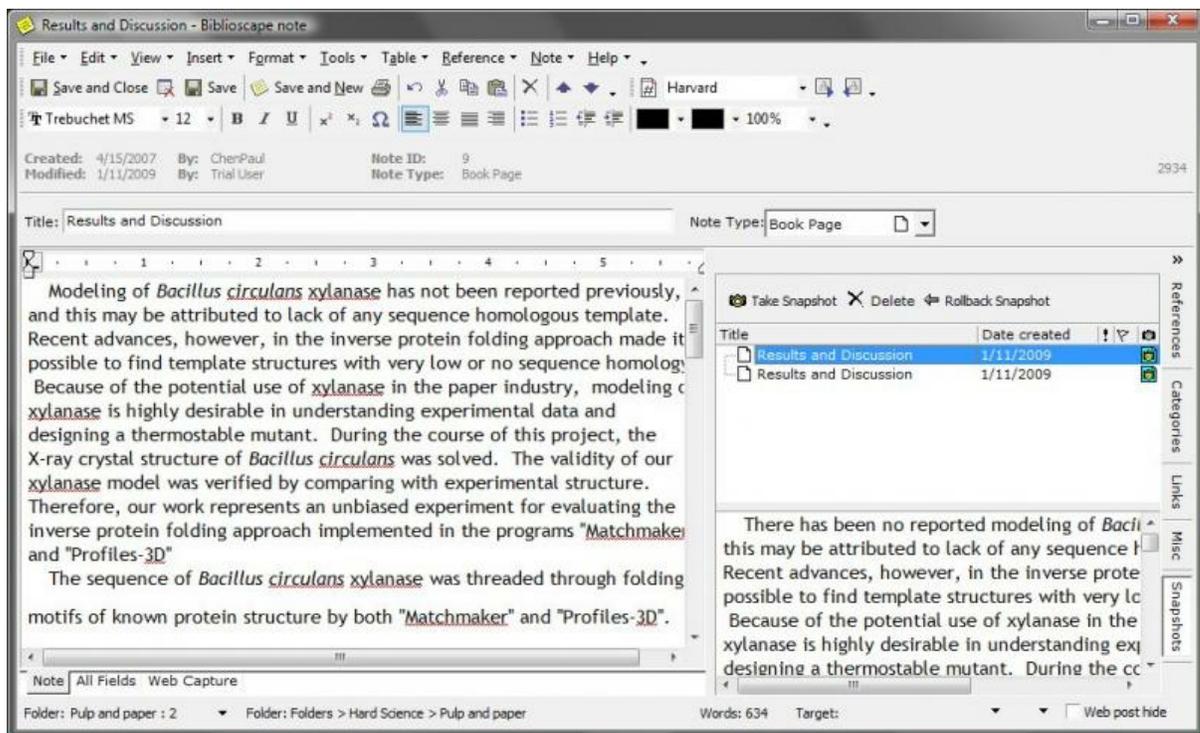
[A method to identify protein sequences that fold into a known three-dimensional structure](#)  
 JU Bowie, R Luthy, D Eisenberg - Science, 1991 - sciencemag.org  
 The inverse protein folding problem, the problem of finding which amino acid

Live Preview | Read Only | Formatted | Links | URL\* | PDF | RichText | Related

*Biblioscope automatically searches the Web to find the most relevant citations for the currently selected reference.*

## Notes

- Notes versioning support has been added. You can select a note and create a snapshot, then compare snapshots side by side. You can easily revert back to a snapshot.
- Notes under a collection can have an independent parent child relationship as well as independent ordering. For example, note A can be the parent of note B in a folder, but when both notes are included in a collection, note B can be made the parent of note A.



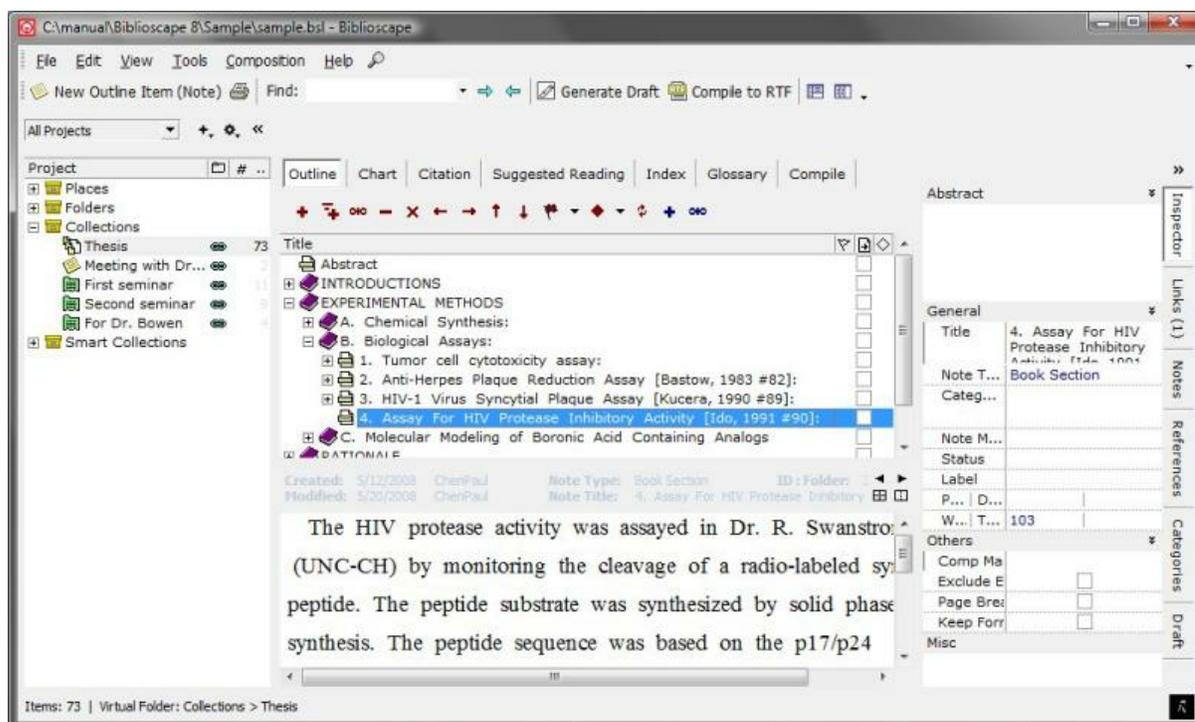
*You can compare different versions of a note after taking snapshots.*

## Categories

When linking to a categories folder, if the link type is "Metadata", all the categories under that folder will be linked. This can be used to add metadata for a record.

## Composition

The composition module is designed to help users write long research papers, theses, or books. The compiled final draft will include formatted citations and a bibliography, a Table of Contents, a formatted suggested reading list, a glossary, and an index. The composition module is only available in the Professional and Librarian editions.



*The Composition module makes writing theses and books a much easier job.*

## 1.2.2 What's new in Biblioscape 7

Biblioscape 7 is the most important upgrade since the version 4 release. All modules are now organized under a single folder tree. A new categories module has been introduced to better organize items. User can now open multiple records at the same time. Cross module search has been added and search words are highlighted in the results display.

### General:

- The application has 3 panes: folder, records list, and tabs. The tabs pane is new and it is mainly used for querying the records. Both the folders pane and the tabs pane can be hidden or minimized.
- You can now manually change the ordering of records in a tree structure. This applies to the folders, notes, tasks, charts, and categories modules.
- Cross module search is now possible. You can enter a search string to search against all the records from references, notes, tasks, charts, categories modules and the links.
- Highlighted search is supported for full text search (not advanced search). All the search words are highlighted in different colors in the hits record preview.
- Individual records are now displayed in a separate window, so you can have both the

records list and individual records displayed side by side. You can also switch between them easily.

- Any record from any module can be linked to any other record from any module.
- All the records from different modules can be flagged in 8 colors.
- The color categories feature is added to all modules.

#### Folders:

---

- The meaning of folders has changed. There are two types of folders: physical folders and virtual folders. Virtual folders include link folders and search folders. The relationship between a physical folder and the records under it has become one to many. A record can only be under one physical folder. The many to many relationship between folders and records in earlier releases are now handled by link folders.
- In earlier releases, only references were organized by folders. Now all the records from references, notes, tasks, charts, and categories modules are organized by folders, very much as how Outlook folders work.
- You can now convert any search to a search folder. The search folder can be organized in the same way as a regular folder in the folder tree. A search folder can only retrieve records from the same module.

#### References:

---

- Notes are displayed in the reference record window. The user can now add or edit notes without leaving the reference window.
- Linked records are displayed in the preview pane.
- The folder field can be used as the subject header in a subject bibliography.
- Bugs were fixed in reference format and import engines.

#### Notes:

---

- Notes records are now organized by folders. The user can manually re-order each note in a notes tree.
- References are displayed in the note record window. The user can search, link, and cite references without leaving the note record window.
- An organization chart view is added to display the notes list.

- The note editor formatting features are improved.

#### Tasks:

---

- Tasks records are converted from a table structure to a tree structure, allowing you to have sub-tasks.
- The task orders can be manually changed.

#### Charts:

---

- You can now easily link folders, references, notes, tasks, charts, and categories records to individual chart objects, so a chart can be used to model your data.
- Preview is supported for the comment text when an chart object is selected.

#### Categories:

---

- This new module is added for tagging records from other modules.
- The categories module can be used as the centerpiece for information management. Topic maps like features are supported for knowledge organization and management.

### 1.2.3 What's new in Biblioscape 6

Bibilioscape 6 doesn't have many changes in the user interface. But underneath, major improvements were made in the core of the reference module. All major styles are now supported, including those used in soft science fields with footnotes or endnotes. Regular expressions can now be used in an import filter. This makes it possible for Biblioscape to handle any kinds of tagged file with ease. Here are the main improvements in Biblioscape 6.

#### Styles and formatting

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- Documents with large graphics and OLE objects can now be handled for formatting.
- Temporary citations can now be added to a footnote or endnote when using styles that support notes style bibliography.
- In style editor, options were added to handle formatting and sorting anonymous works.
- In style editor, end page can be formatted as 2-digits number.
- In style editor, a check box was added to remove periods in journal names.

- In style editor, ambiguous citations can now be handled in 4 different ways.
- In style editor, subsequent works by the same author can now be handled in both citations and bibliography.
- In style editor, multiple citations can now be sorted 5 different ways, so it is no longer necessary to do the sorting in temporary citations.
- In style editor, Title field can now be formatted in 3 ways: as is, headline, or sentence.
- In style editor, repeated citations in footnotes or endnotes handling is now supported.
- In style editor, the references section layout can now be specified using indentation and spacing properties.
- In style editor, the authors list cutoff is now handled in a better way.
- In style editor, the "cited pages" field is added for formatting. Cited pages is not stored in the database, but added by authors inside temporary citations in footnotes or endnotes.
- Two fields, "Favorite" and "Category", were added to the style table. Styles can be sorted or grouped by these two fields.
- All major styles are now supported, including Chicago, MLA, APA, Turabian, ACS, CBE, Harvard, Vancouver, etc. Styles for citing inside footnotes or endnotes starts with "\*" in their names.

### Import filters

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- Regular expression can now be used in import filter to match tags in import file. Regular expression string should be added inside RE(...)RE.
- Two fields "Favorite" and "Category" were added to import filter table. Import filters can be sorted or grouped by these two fields.

### Others

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- Subject bibliography support is added under "File | Print Bibliographies". Any field can be selected as the subject and any output style can be used to generate the formatted list. Both subject and the number of counts can be used to sort references in ascending or descending order.
- Regular expression is also added to the "Edit | Find" and "Edit | Replace" window. When the box "Regular Expression" is checked, the text in the "Find" box is treated as a regular expression pattern.

- There is better support for international users. Now switching to another language is as easy as going to the "Tools | Options" window and changing two settings on the "Format Manuscript" tab. All major languages are supported including all European languages, Chinese, Japanese, Korean, Arabic, Hebrew, etc.
- An "Import from Clipboard" button is added to the import window, so users can copy records from a Web page, and go to the Biblioscape import Window to click this button without going through save a file and importing that file.

### 1.2.4 What's new in Biblioscape 5

The changes in Biblioscape 5 are mostly in the database backend. Earlier versions of Biblioscape depended on Borland's Database Engine (BDE) for all database related operations. BDE is fast and allows users to use several popular databases like Paradox, Access, and InterBase for data storage, but there are several problems with BDE. First, Borland will no longer develop BDE. Second, BDE is used by lots of other applications like WordPerfect Office. This can cause database stability problems for some users because of version and setting conflicts. We have replaced BDE with a new database engine that is fast, reliable, and extremely easy to setup for a multi-user environment.

Biblioscape 5 can be used by a single user with a database on the local drive, by a group of users with a database on the file server, or even by users from different countries accessing the database through the Internet. For remote access, Biblioscape comes with the BiblioRemote server which lets users open a remote database and use it the same way as if it is on their own machine. Biblioscape also allows remote access using a web browser interface through the BiblioWeb server. BiblioWeb is completely redone to provide more features and a cleaner interface.

### 1.2.5 What's new in Biblioscape 4

Biblioscape 4.0 is a major upgrade. Several new modules are added including BiblioWord, Notes, Tasks, Charts, and Library. This has changed Biblioscape from a traditional bibliographic software into a new type of software which we call a Research Information Manager.

#### Database

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- 19 data fields are added for the reference table. This has made Biblioscape more flexible when more reference types needs to be added.
- The Keywords field is changed from a string field to a memo field. That means the 255 characters per record limit is removed.
- Field Date\_freeform was added for storing incomplete dates like "Jan. 1993", "Winter 2000".

### Interface

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- User interface has been improved to have the look and feel of a Microsoft Outlook model. An outlook bar was added for easy access to different modules.
- Menu systems and tool bars are now fully customizable, just like the way Microsoft Office applications do it.
- All major data grids are customizable. Users can choose to display any fields by drag and drop. Data can be grouped by any field at multi-levels. All these changes can be saved and recalled.

### References

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- 8 new reference types are added as default. These are: Bill, Case, Film or Broadcast, Hearing, Manuscript, Music Score, Serial, and Statute.
- Reference editor has been re-written. For fields Authors, Journal, and Keywords, the nearest match will be shown as user type during data entry. This will help maintain data consistency as well as save time.
- A new search tool called Dynamic Folder lets user organize saved queries in a tree structure. Clicking a blue folder will open all references satisfying the search criteria.
- If you need to move the content of one data field to another, use the new Move Field utility.

### BiblioWord

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- This is a new module in version 4.0.
- It is a full featured word processor integrated with References module. Users can just drag and drop references from the right of the Window to insert temporary citations.
- Supports graphics, tables, OLE, live spelling check, thesaurus, etc.

### Internet

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- The Resources editor is improved for organizing Web based bibliographic resources.
- Users can capture a Web page into Biblioscape database as a note or reference.

### Notes

---

- This is a new module in version 4.0.

- Manage all your free form information such as ideas, notes, author information, tips, comments, etc. Notes are organized in a tree structure.
- Link a note to other types of information in your database, like references, tasks, Web sites, local files, library catalog, etc.
- Find your note with indexed search and advanced search. You can also display notes in a table where they can be sorted and grouped.

### Tasks

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- This is a new module in version 4.0.
- Manage tasks related to your research.
- Tasks can be sorted, grouped, and linked to other modules in Biblioscape.

### Charts

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- This is a new module in version 4.0.
- Charts is best used to present your ideas. Each chart object can be linked to references, notes, tasks, library, so it is the best tool for building your knowledge map.
- Chart editor includes all the handy tools and is very easy to learn.

### Library

---

- This is a new module in version 4.0.
- This module is designed for managing a small library. It includes 7 sub-modules: Catalog, Serials, Circulation, Interlibrary Loan, Borrowers, Lenders, Suppliers.
- Catalog items can be created from records in the References module with one click.

### BiblioWeb

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- Interface design has been improved; some small icons are removed to give a uncluttered view.
- The limit on the number of folders displayed is removed.
- Rich text documents can be downloaded and viewed in a browser if Word is available.
- New license option: concurrent user license.
- The file "web\_post\_hide.txt" under "\\Global" directory can be used to control which data

fields to hide when posted to the Web.

## 1.3 Installation and removal

This chapter deals with issues about installation, removal, group installation, upgrade, database conversion, transferring settings, etc.

### 1.3.1 Installing Biblioscape

Biblioscape is designed to be installed by any user. Whether or not you have an administrator account on your computer (normally, Windows programs can only be installed if the user has administrator rights), you can install Biblioscape. As a result, there is no shortcut created automatically and Biblioscape is not added to the Windows programs list, although it is very easy to do so manually after installation.

#### Installation

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1. Create a new folder on your hard drive. We call this the "installation folder". If you have Windows Vista, do not create this folder under "C:\Program Files\". We recommend you create the installation folder at "C:\Biblioscape 8\".
2. After downloading the Biblioscape installation file "bsp8.exe" from the web, double-click the executable to run it. You will be prompted about the installation. Click the OK button.
3. The WinZip self-extractor window will appear. Click the "Browse..." button and select the folder you created in step one. Click the UnZip button. Biblioscape will be uncompressed to the folder you selected. After unzipping, Biblioscape will start automatically if you leave the option checked.

Please read the license agreement in the Biblioscape installation folder. If you have a previous version of Biblioscape on your computer, please install the new version to a different folder. There is no need to uninstall the previous version. The installation of Biblioscape itself takes about 30 megabytes.

#### Windows Vista

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Windows Vista is more restrictive than Windows XP for security reasons. Even if you have an administrator account, you cannot install Biblioscape under the "C:\Program Files\Biblioscape 8\" folder because Vista won't let Biblioscape write files in sub-folders of "C:\Program Files\Biblioscape 8\". You must put the installation folder in a place over which you have full control, for example, "C:\Biblioscape 8\" or "C:\manual\biblioscape 8\". If you want others to be able to run it, you have to put the installation folder in the Public folder. If you don't have administrator privileges, users with standard accounts can still install Biblioscape by putting the installation folder in the folder with your login name, or the public folder.

## Windows XP

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Windows XP does not allow users with a limited account to write to most folders. If you have an administrator account, you can install Biblioscape in any folder you want. If you want others with limited accounts to run it, you have to put the installation folder in a place where every user has write privileges, for example: "C:\Shared Documents\Biblioscape 8\". If you only have a limited account, you can install Biblioscape under the "Shared Documents" folder if you want others to run it. You can also put the installation folder under "My Documents".

## Windows 95, 98, Millennium, NT, 2000

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Any Windows account can install Biblioscape. Your account can be an administrator, a standard user, or a restricted user. The installation folder can be in any place. For example: "c:\program files\Biblioscape 8\", "c:\Biblioscape 8\", "c:\my downloads\", or "My Documents".

## System Requirements

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Biblioscape runs only under Windows 95, 98, Millennium, NT 4, 2000, XP, and Vista. It also runs under 64 bit Vista and XP. Users have run it under WINE on Linux with success. It does not run under Windows 3.1, or other operating systems (Macintosh, UNIX), but once published on the web using BiblioWeb, users can access a Biblioscape database with any computer (PC, Macintosh, and UNIX workstations...) through a web browser. Web access includes searching the Biblioscape database, retrieving references in any desired format, modifying existing records, and even adding new records and formatting documents. BiblioWeb requires Biblioscape Professional or Librarian editions, but all features of Biblioscape are available for the first 100 runs in the trial edition.

## Creating a shortcut

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Since Biblioscape is not installed by an installer, there is no shortcut created. You can use Windows Explorer to run Biblioscape by double clicking the file "Biblioscape.exe" under the Biblioscape installation folder. To create a shortcut, drag "Biblioscape.exe" to your desktop using the right mouse button. Release the right mouse button and select "Create Shortcut". Once you've done this, you can run Biblioscape by double clicking the desktop shortcut icon.

Windows XP: It is also possible to add Biblioscape to the Windows Start menu manually, as would normally be done by an installer. To do this, simply use the Windows Explorer to create shortcuts to Biblioscape, BiblioSidekick, Rebuild and any other applications you want in the start menu. Then paste these shortcuts into the "Start Menu" folder under your computer or user name. The applications will now appear in the Windows start menu.

## Don't have Internet connection

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If your computer does not have an Internet connection, you will need to download the installation

file to a USB drive using a computer with Internet access. Then you can copy it from the USB drive to your computer to install it.

#### [Install the add-in for Microsoft Word](#)

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If you have Microsoft Word 6, 7, 97, 2000, 2003, or 2007 on your computer, you can install the Biblioscape Add-in template file into Word. Biblioscape-related menus will be added to the Word menu system, and you can format a paper without leaving Word. To install the Add-in, first locate the "Startup" folder where Word is installed. Then copy the file "bib\_word.dot" from the Biblioscape "Tools" folder into the Word "Startup" folder. The next time you start Word, the template will install itself and add Biblioscape-related menus into Word.

#### [Install the add-in for Corel WordPerfect](#)

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Several WordPerfect macros are installed in the "...\Biblioscape 7\Tools\" folder. To run these macros, please go to the menu command "Tools | Macros | Play..." in WordPerfect. Go to the "Tools" sub-folder under Biblioscape installation and run the macros. The macros under the Biblioscape Tools folder require saving your WordPerfect document as a RTF file. RTF is a Microsoft standard. It is not very well implemented in WordPerfect. If you have complicated formatting in your WordPerfect document, going through RTF may lose some formatting. With Biblioscape, it is also possible to format your WordPerfect document natively without going through RTF. Please read the section Integration with Corel WordPerfect for more information.

### **1.3.2 Removing Biblioscape**

Since Biblioscape is not installed by a Windows installer, removing it is very simple. Just delete the Biblioscape installation folder; the job is done. If you have created a desktop shortcut, select the shortcut and press the Delete key to remove it as well.

### **1.3.3 Running Biblioscape from a USB drive**

You can run Biblioscape from a USB drive. This feature is very convenient for users who need to take the application with them to the library, attend a conference, etc. When you run Biblioscape from a USB drive on a public computer, it changes to the trial edition. Since the trial edition is fully functional for 100 runs, this won't be a problem -- it is unlikely that you will use the same public computer to run Biblioscape more than 100 times.

1. Copy the Biblioscape installation folder and all its sub-folders from your hard drive to the USB drive.
2. On the USB drive, create a folder named "usb" under the Biblioscape root folder.

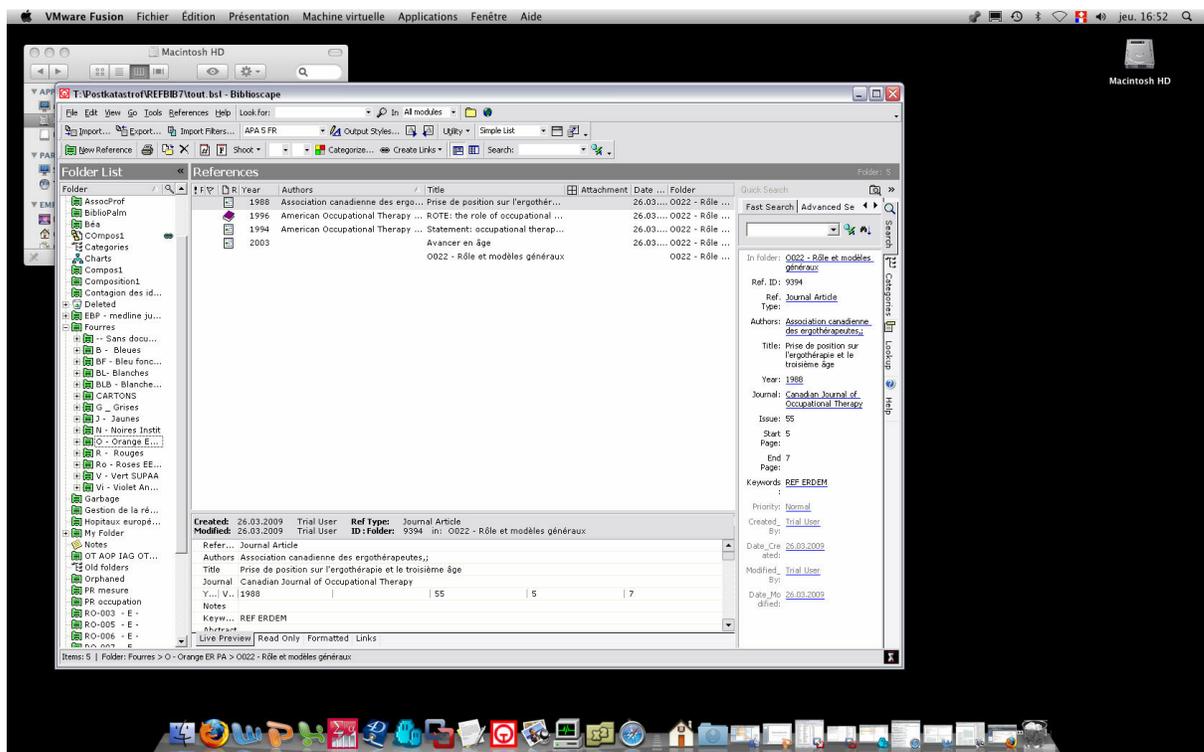
3. Copy all the files in your database folder to the "usb" folder created in the last step.
4. Take the USB drive to another computer. Double click "Biblioscape.exe" on the USB drive to run it. The database in the "usb" folder will be opened automatically. At startup, if Biblioscape detects a "usb" folder under the root folder, Biblioscape will open the database in the "usb" folder automatically.

### 1.3.4 Running Biblioscape under another OS

Biblioscape is designed to run under Microsoft Windows only. In recent years, Windows can be run virtually under other operating systems like Max OS X and Linux. Biblioscape can be installed if you have virtual Windows running. The installation follows the same steps as installing Biblioscape under real Windows.

#### Max OS X

Popular virtual Windows programs under Mac OS X include Parallel and Virtual PC. The following is a screenshot of Biblioscape running on Mac under VMware 2.0.



#### Linux

Users have reported running Biblioscape successfully under Linux WINE.

### 1.3.5 Major upgrades and minor upgrades

Major upgrades include major changes in program design and database structure. They are released about every two years. Minor upgrades include mainly bug fixes and minor improvements.

Immediately after a major upgrade, you may see minor upgrades on a weekly basis. After a major upgrade is stabilized, you will see minor upgrades released on a monthly basis. Here are the differences between major upgrades and minor upgrades.

- Major upgrades are not free. Minor upgrades are always free of charge.
- Major upgrades need to be installed on a different folder from the previous installation. Minor upgrades are installed on the same folder and replace previously installed files.
- After installing a major upgrade, you will have a trial period with all features unlocked. Installing minor upgrades have no effect on your trial counter.

#### [Install a major upgrade](#)

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A major upgrade is downloaded as a self extracting zip file. You can download the latest Biblioscape release at <http://www.biblioscape.com/download.htm>. Double click the downloaded file to install it. You should not install it over a previous installation. You don't have to remove the previous version, just be sure to install a major upgrade to a new folder.

#### [Install a minor upgrade](#)

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A minor upgrade is downloaded as a zip file. You can download the latest Biblioscape 8 minor upgrade at [http://www.biblioscape.com/download/bsp8\\_patch.zip](http://www.biblioscape.com/download/bsp8_patch.zip). The release history can be found at <http://support.biblioscape.com>. Unzip it to your Biblioscape root folder. For example, if you have installed Biblioscape 8 before under the folder "C:\Biblioscape 8\", you should unzip minor upgrade 8.02 to the Biblioscape 8 root folder "C:\Biblioscape 8\". When prompted to replace existing files, click Yes to replace them.

### **1.3.6 Moving installation from one computer to another**

If you have bought a new computer and want to install Biblioscape but also want to keep all the customized settings, import filters, styles, etc., you can simply copy your Biblioscape installation folder from the old PC to the new one. Run Biblioscape on the new PC and email [support@biblioscape.com](mailto:support@biblioscape.com) for a new registration key. You will receive up to 3 keys per purchase. You will find that all the option settings, customized styles and import filters are copied to the new PC. The only thing that is not copied is menu and toolbar customization. Those settings are saved under your PC's registry.

If your database folder is not under a Biblioscape installation folder, you must copy your database folder to the new PC as well. On the new PC, run Biblioscape and go to "File | Database | Open Database". Select the "\*.bsl" file under the copied database folder to open it.

## 1.4 Biblioscape features

After several major releases, Biblioscape has evolved from a traditional bibliographic software into a Research Information Manager. Biblioscape helps researchers organize all kinds of information in a single database, and link them together to build a knowledge base. It consists of 7 modules that address different aspects of a researcher's needs.

### Core modules

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- The References module is for storing, managing, and searching for bibliographic references. Bibliographic records from different sources can be imported into a Biblioscape database with the appropriate import filter. References are organized into folders. Several searching tools are provided to query the database.
- BiblioRemote is a database server that is included in all editions of Biblioscape. It allows users to open a Biblioscape database in remote locations. It provides an ideal solution for a group of users to share a common Biblioscape database. Group members can be in the same building or in different parts of the world.

### Basic modules

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- The Notes module is designed to collect any free text information that does not fit into the reference database. A note can be your ideas, comments, background information about an author, etc. Notes are organized in a tree structure. A note can be linked to other notes, references, tasks, etc.
- The Categories module is for users with a large database. It can be used as a tagging system to classify your information including references, notes, tasks, etc. It can also be used to build a knowledge base with concepts organized in a tree structure and linked to references, notes, web page, files, etc.

### Advanced modules

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- The Tasks module is a simple To Do list manager that is integrated with the References and Notes modules. It is designed to manage tasks related to your research, so you won't need a separate program for it. Tight integration with other modules of Biblioscape make it an ideal tool to manage research related tasks.
- The Charts module can be used to draw flow charts, organization charts, etc. A chart object can be linked to the References, Notes, Tasks, and Library modules. You can draw a chart to express ideas and procedures in your research, and use SQL to connect objects in your chart to other modules in Biblioscape.

- The Composition module is for book and thesis writing. For a large writing project, you can use the composition module to assemble your notes into a book outline, inset references as citations or suggested reading, and add records in the categories module as index term or glossary term. You can then compile a final draft with a table of contents, an index, formatted citations and a bibliography, a suggested reading list, and a glossary, all automatically generated.

#### Web modules

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- The Internet module can be used to search online bibliographic databases via a web browser. With a single click, your web search results can be captured into a Bibioscape database. Besides capturing bibliographic records, you can also use the Internet module to capture web pages.
- Bibioscape also includes a web server application, BiblioWeb. With just one click, your bibliographic database can be published on the Web. Web users can be assigned Read or Write privileges to browse, search, and even to add and delete bibliographic records using a Web browser. This is the easiest way for a research group to share a common bibliographic database on the Web.

#### Library modules

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- The Library module is for managing a small research library. It could be a researcher's personal library, a department library, or even a small corporate library. It includes 7 sub-modules to handle different tasks in library automation. These are: Catalog, Serials, Circulation, Interlibrary Loan, Borrowers, Lenders, and Suppliers.

### 1.4.1 References module

#### Enter references

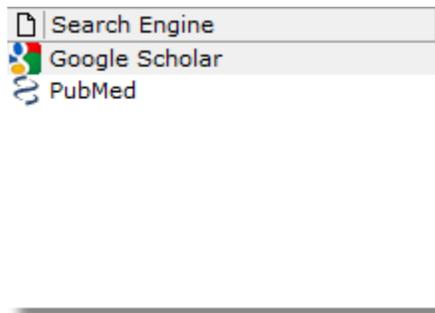
---

- Users can add a new reference based on an existing one. Bibioscape also supports Auto-Complete for repeated text like author names, keywords, and journal names.
- Reference Quick Add: Add a new reference to your database with minimum typing. Just enter the first author's last name, the year it was published, and a couple of keywords in the title. Then, Bibioscape will add the rest for you and display the paper's full text inside Bibioscape if it can be found on the Web.

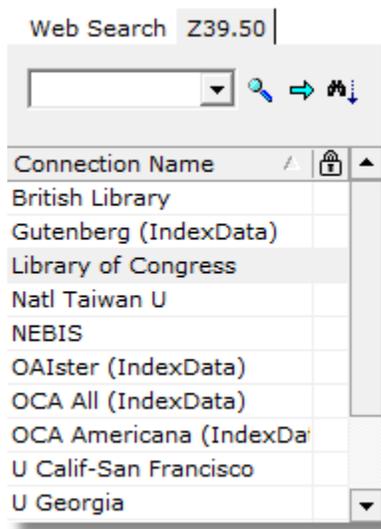
tropsha 2008 combinatorial



- Online Search - Web Search: Search and capture references in one step against major search engines like Google Scholar and PubMed. PubMed contains over 15 million citations. It is estimated that Google Scholar indexes over 500 million documents. These freely available citation databases rival any commercial citation database.



- Online Search - Z39.50: Search your university library catalog and capture the search results in one step. Biblioscape includes 2,000 plus Z39.50 connection files for university, college, and public library catalogs. It also allows you to search subscription based commercial databases if you have an account and a password. If a Z39.50 based database is not included, you have easily add it to Biblioscape if you know the parameters.



- Direct Export: Biblioscape supports EndNote Direct Export. Many citation database web sites allows you export search hits directly into EndNote or Reference Manager. You can choose to export the hits directly into Biblioscape instead of EndNote. In Biblioscape, go to "Tools | Options". On the "Import / Export" tab, click the button "Associate with Biblioscape".

**Export Citations**

<< [Back to Results](#)

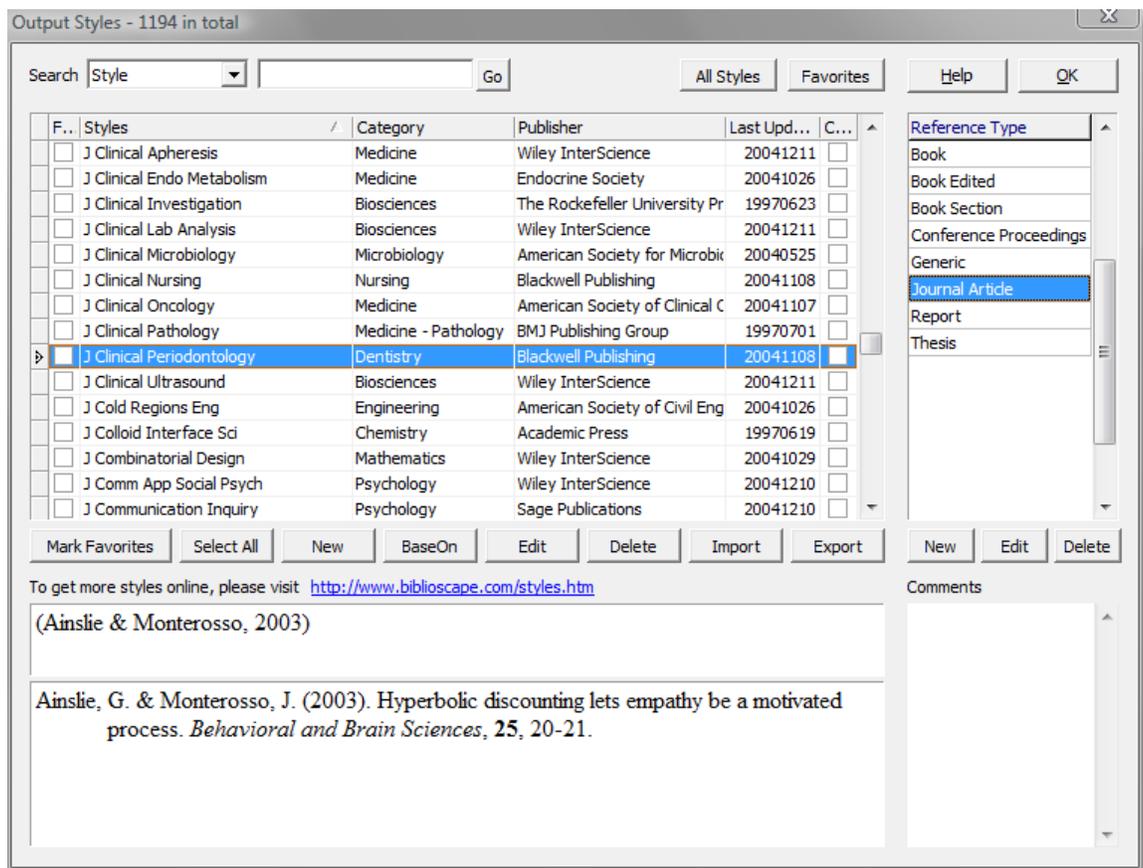
- [Export directly to ProCite, EndNote or Reference Manager.](#)
- [Export directly to RefWorks.](#)

## Import references

- Biblioscape allows you to import references from many bibliographic software including EndNote, Reference Manager, ProCite, etc.
- A Biblioscape import filter can be created to import references in any tagged format. Regular express is supported in the import filter. This makes Biblioscape import filter very flexible. There are more than 200 pre-made import filters for many commercial and academic bibliographic databases.
- Biblioscape can even import formatted references. You can save the bibliography from a paper or book as a plain text file; Biblioscape will search the Internet to find the best match of each reference in your bibliography list and import it into your database.
- You can also import references from a delimited file, spreadsheet file, or database file using a step by step wizard.

## Format manuscript

- Biblioscape includes 1,000 plus pre-defined styles for all major academic journals.

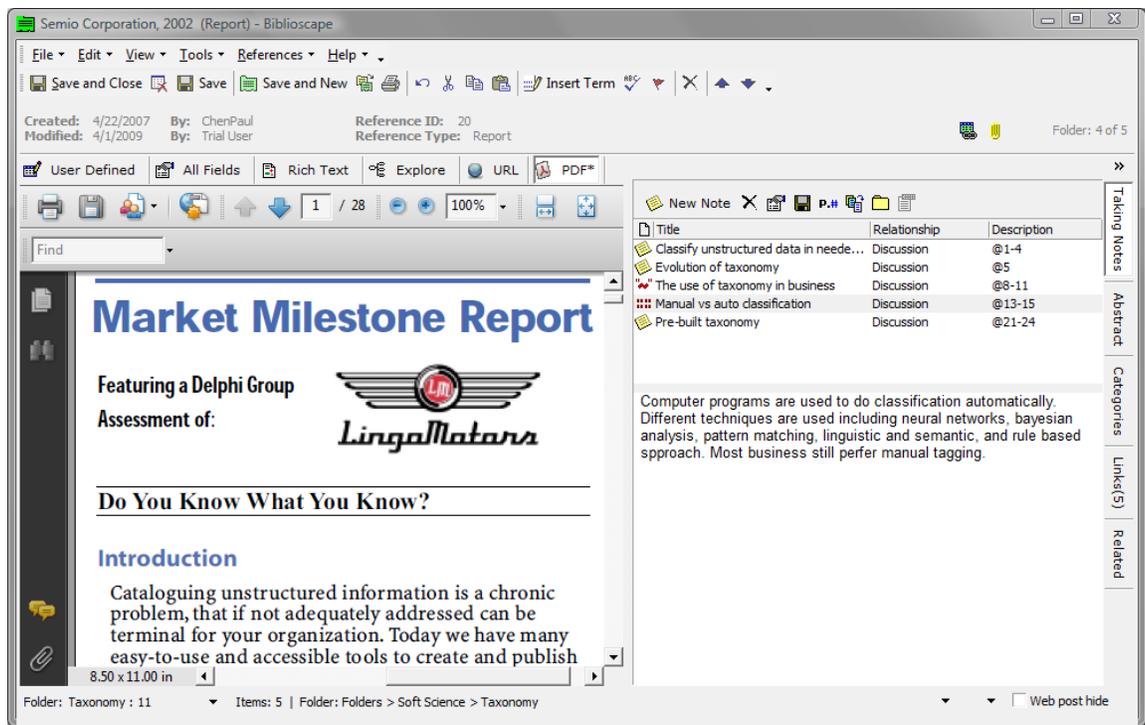


- New styles can be created by users with an easy to use style editor.
- Bibloscope can generate formatted citations for footnotes as well as an end of the book bibliography.

## 1.4.2 Notes module

### Create notes

- Notes can be added inside reference editor. If the full text of a reference is available as PDF or HTML, you can display the full text on the left panel and take notes on the right panel.



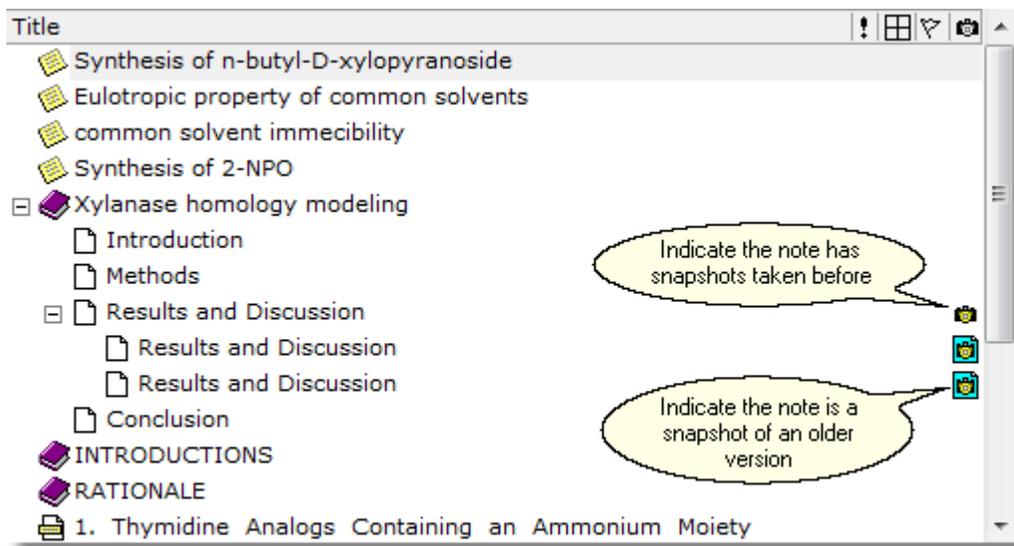
- You can enter notes continuously in a brainstorm session. Just type what's on your mind and press the Enter key to add a note.

Type each idea here and press the Enter key     Click the Quick Add button

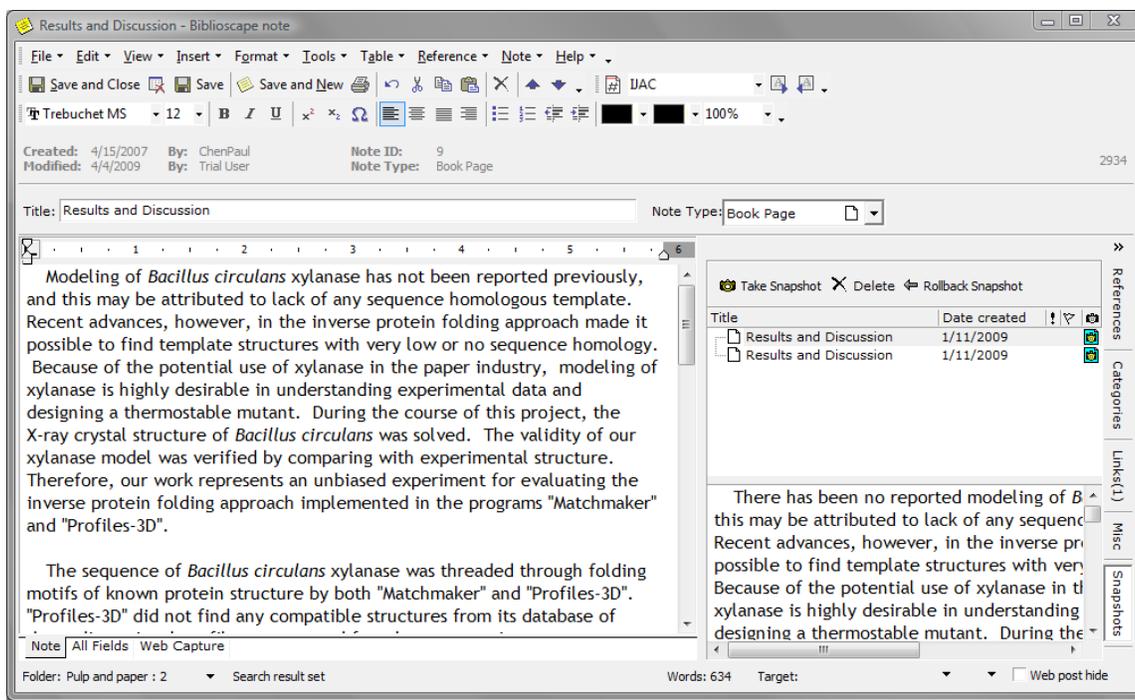
- Notes can also be captured from the Web using Bibloscope built-in Web browser.
- You can import notes from many file formats including delimited files, spreadsheets, databases, etc. through a wizard interface.

### Note versioning

- You can take a snapshot of a note. Snapshots are saved as child notes with a special icon.



- Original note and snapshots can be displayed side by side for comparison. You can easily roll back to an older version.



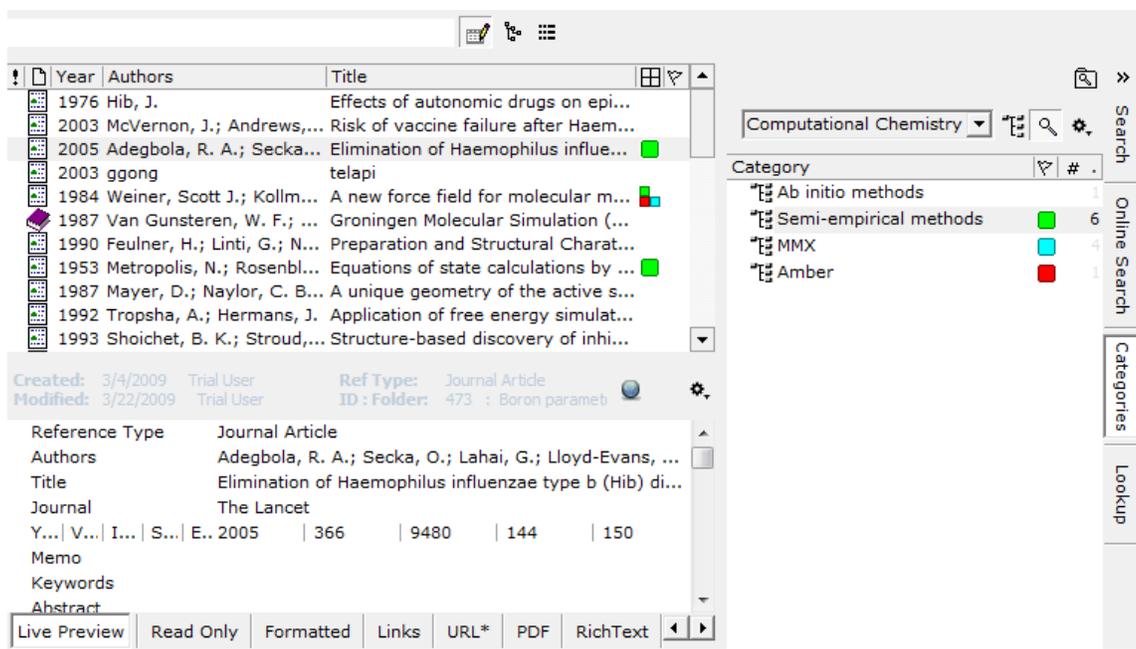
### Use notes in writing

- You can shoot your notes into a MS Word or WordPerfect document. All linked references of your note will be included as well.
- Any note can be included in a composition project. You can just drag and drop your notes into the outline of your composition project.

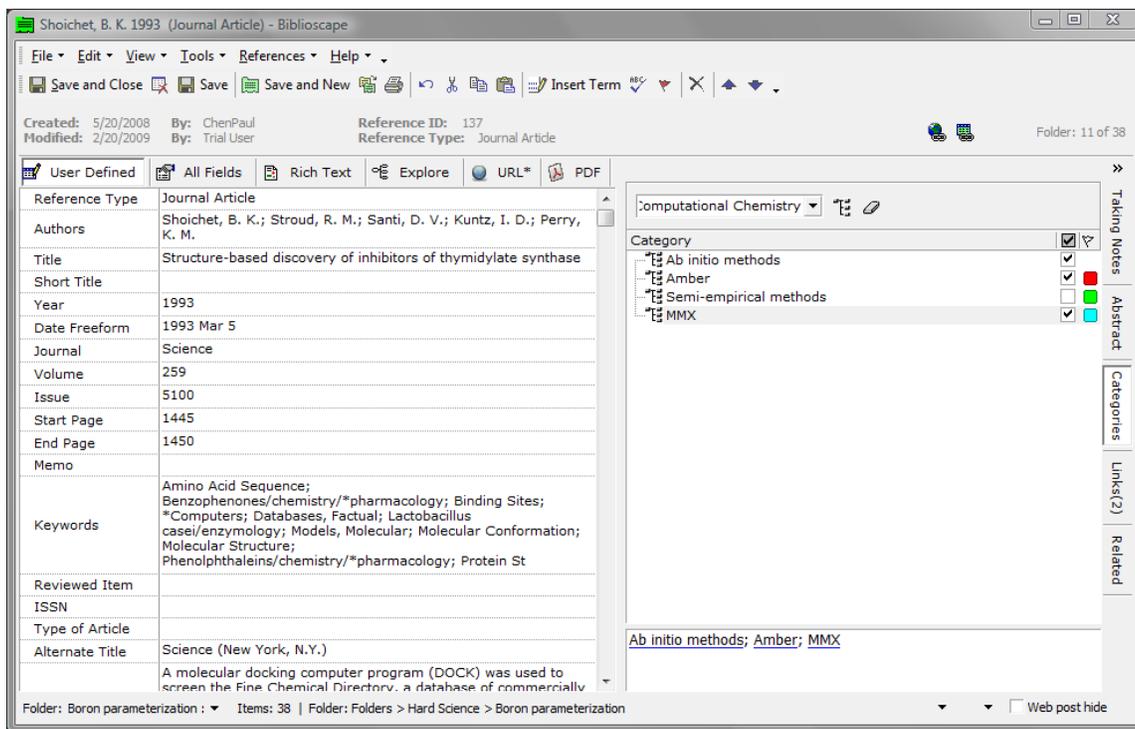
### 1.4.3 Categories module

#### Use categories to tag records

- References, notes, tasks, and charts can be easily tagged by dragging and dropping it into a categories tree.

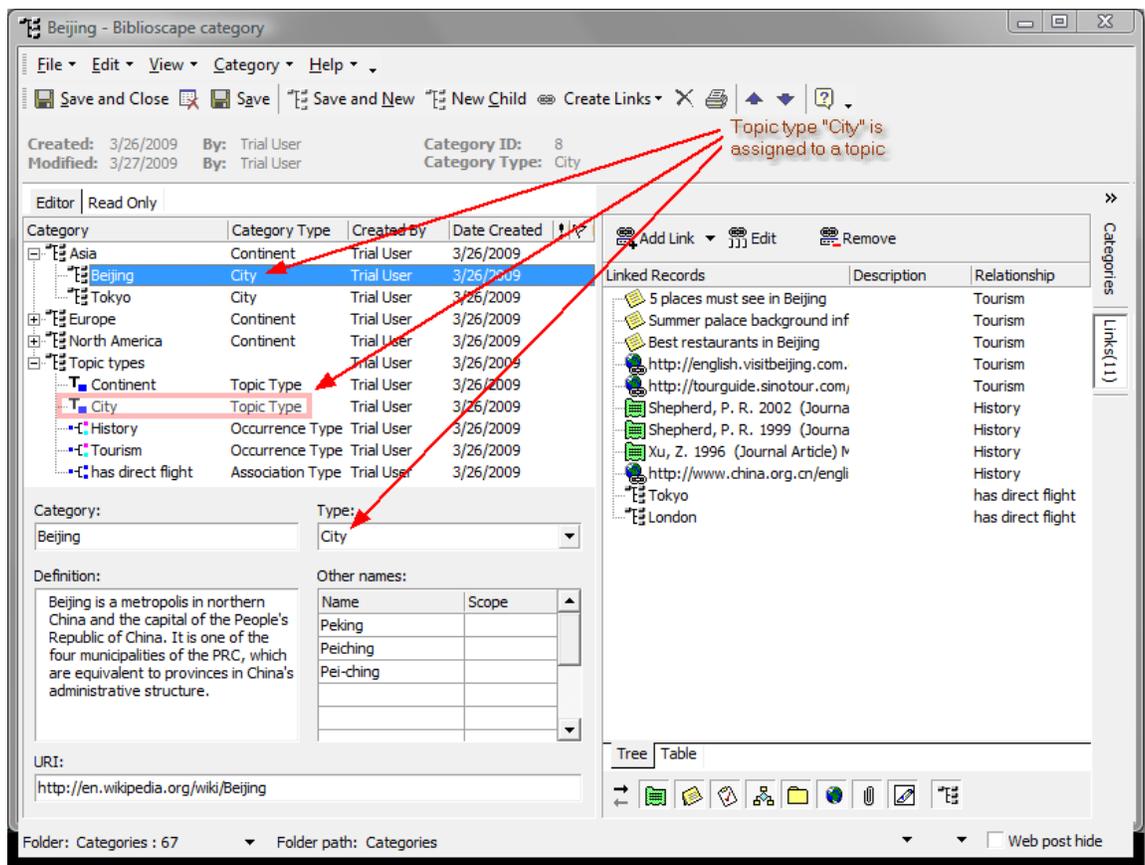


- By changing the color of a category, the colored category column of all the records tagged by this category will change accordingly.
- When opening an individual record, you can tag the record easily by checking the box before each category in the categories tab.



### User categories to build topic maps

- The categories module can be used to build topic maps. Topic maps is a flexible way to represent knowledge and organize information.



## 1.4.4 Other modules

### Tasks module

- Create tasks from references and notes module by drag and drop.

The screenshot displays the Biblioscape 8 interface. On the left, a sidebar shows a project tree with folders like 'Places', 'Folders', 'Online Search', 'New Categories', 'GTD', 'Hard Science', 'Lab tasks', 'Parameteriz...', 'Pulp and pa...', 'Nucleoside ...', 'Xylanase ho...', 'Nucleosides...', 'Boron para...', 'Abbreviations', 'Computatio...', 'Charts', 'Soft Science', 'Departmental', 'Collections', and 'Smart Collections'. The main window shows a table of references with columns for Project, Year, Authors, and Title. A red arrow points from a callout box to the 'Lab tasks' folder in the sidebar. The callout box contains the text: "Drag and drop selected references or notes into a tasks folder to create a new task". Below the table, a detailed view of a selected reference is shown, including fields for Reference Type, Authors, Title, Journal, Y..., V..., I..., S..., E., Memo, Keywords, and Abstract. The 'Publishing' section at the bottom includes options like Live Preview, Read Only, Formatted, Links (1), URL\*, PDF, RichText, and Related.

Project	#	Year	Authors	Title
		1988	Bourbonnais, R.; Paice, M. G.	Veratryl alcohol oxidases from the ligni...
		1997	Bajpai, P.	Microbial xylanolytic enzyme system: ...
	173	1993	Zygmunt, L. C.; Paisley, S....	Enzymatic method for determination of...
		1992	Luthy, R.; Bowie, J. U.; Eis...	Assessment of protein models with thr...
	12	1993	Thomson, J. A.	Molecular biology of xylan degradation
		1992	Godzik, A.; Kolinski, A.; Sk...	Topology fingerprint approach to the in...
			Chothia, C.	Proteins. One thousand families for the...
			Bowie, J. U.; Luthy, R.; Eis...	A method to identify protein sequences...
			Eisenberg, D.; Bowie, J. U....	Three-dimensional profiles for analysin...
		1993	Blundell, T. L.; Johnson, M....	Catching a common fold
	162	1995	Johnson, M. S.	Cornering and catching the common pr...
	91	1993	Bajorath, J.; Stenkamp, R....	Knowledge-based model building of pr...
	38	1993	Godzik, A.; Kolinski, A.; Sk...	De novo and inverse folding prediction...
	22			
	4			
	2			

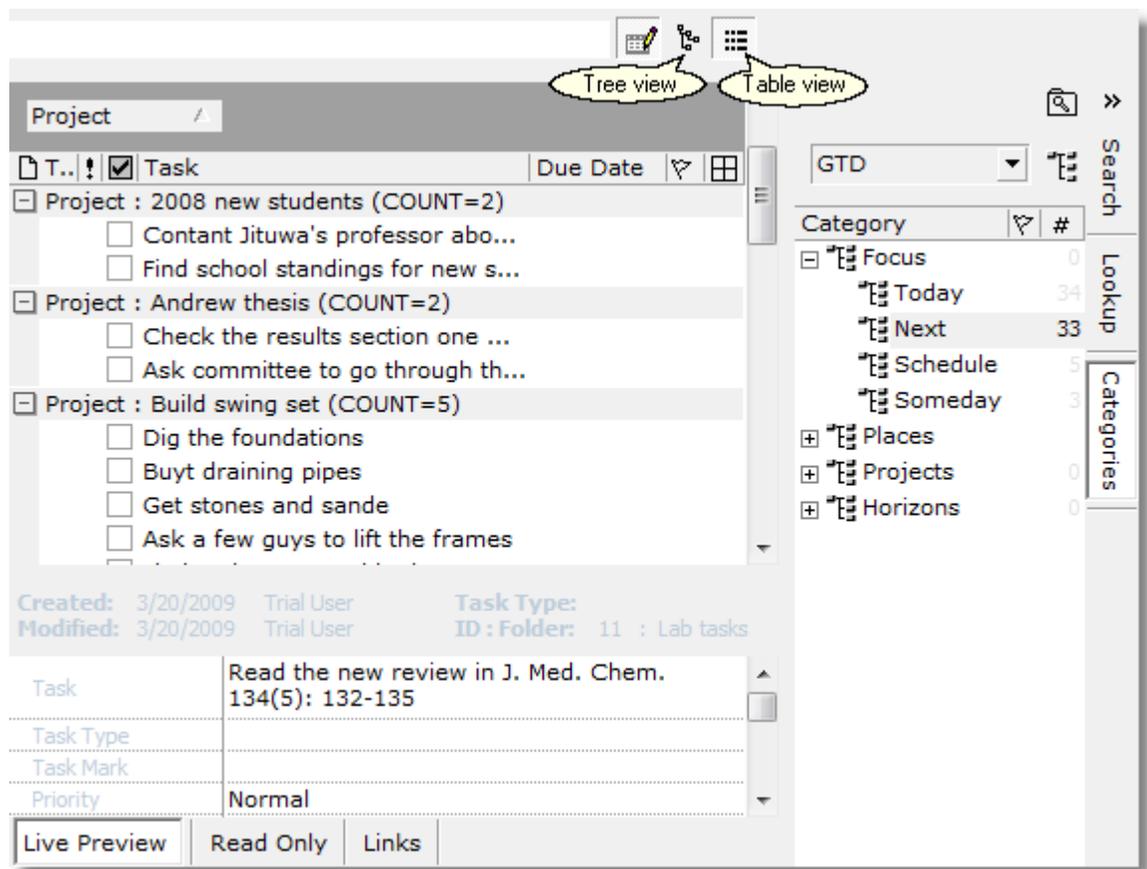
Created: 4/15/2007 ChenPaul Ref Type: Journal Article  
 Modified: 1/8/2009 Trial User ID: Folder: 8 : Xylanase homology

Reference Type: Journal Article  
 Authors: Godzik, A.; Kolinski, A.; Skolnick, J.  
 Title: Topology fingerprint approach to the inverse protein folding problem  
 Journal: J Mol Biol  
 Y... | V... | I... | S... | E.. 1992 | 227 | 1 | 227 | 238  
 Memo  
 Keywords: Algorithms; Azurin/chemistry; Bacterial Outer Membrane  
 Abstract: We describe the most general solution to date of the problem of

**Publishing**  
 Live Preview | Read Only | Formatted | Links (1) | URL\* | PDF | RichText | Related

Items: 162 | Folder: Folders > Hard Science > Xylanase homology

- Apply Getting Things Done (GTD) principles in your tasks management.



### Charts module

- Create flow charts, organization charts to represent ideas and procedures in your research.
- Link an individual object in your chart to references, notes, etc.

### Library module

- Transfer any records from your references module into a library catalog.
- Use built-in sub-modules to manage a small research library.
- Manage library collection data into 56 data fields, organized into several groups including Bibliographic, Holding, Request, Order, Serial, and General.
- Manage serials and related activities including tracking, routing, etc.
- Search, sort, and group circulation data. Display circulation activities by borrower, status, subject, etc.
- Check out books for library patrons, add notes, and easily change due dates.

- Check in books returned by borrowers. Automatically reminds librarian about Hold statuses.
- Renew books for borrowers or add a note. Find renewed items by ID or title.
- Put a hold on a checked out book. Show a reminder when that book is returned.
- Manage Interlibrary loan requests, track loan status, log shipping, etc.
- Manage borrower's information (address, phone, fax, email, etc.)
- Manage lender's information (contact's name, phone, fax, email, notes, etc.)
- Manage supplier's information (address, phone, fax, email, notes, etc.)

### 1.4.5 BiblioWeb and BiblioRemote

#### BiblioWeb

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- Publish databases on the Web with BiblioWeb server. No other web server is required. Runs on any version Windows.
- Search references with Fast Search to return hits in seconds even as the size of your database increases.
- Advanced search limits searches to certain fields. Build complex queries with up to 3 conditions.
- Users with a Write account can add new references to the database using a web browser.
- Users can edit or delete their own references over the web.
- Import references over the Web with the right import filter so you don't need to enter references one by one.
- Hyperlinks Search results are displayed with hyperlinks. Clicking on the hyperlink will trigger a new search for related items.
- Marked references can be displayed in any of the output styles that exist in Biblioscape.
- Marked references can be exported in several formats to be easily imported into other programs.
- Users can even format a paper over the Internet. Temporary citations in a document will be converted to formatted citations and bibliographies.
- Includes a user forum application, so you can host a web based forum without extra cost.
- Allows research group members to share a common task list related to research work.

- If you have Biblioscape Librarian edition, all its catalog data is searchable on the Web.

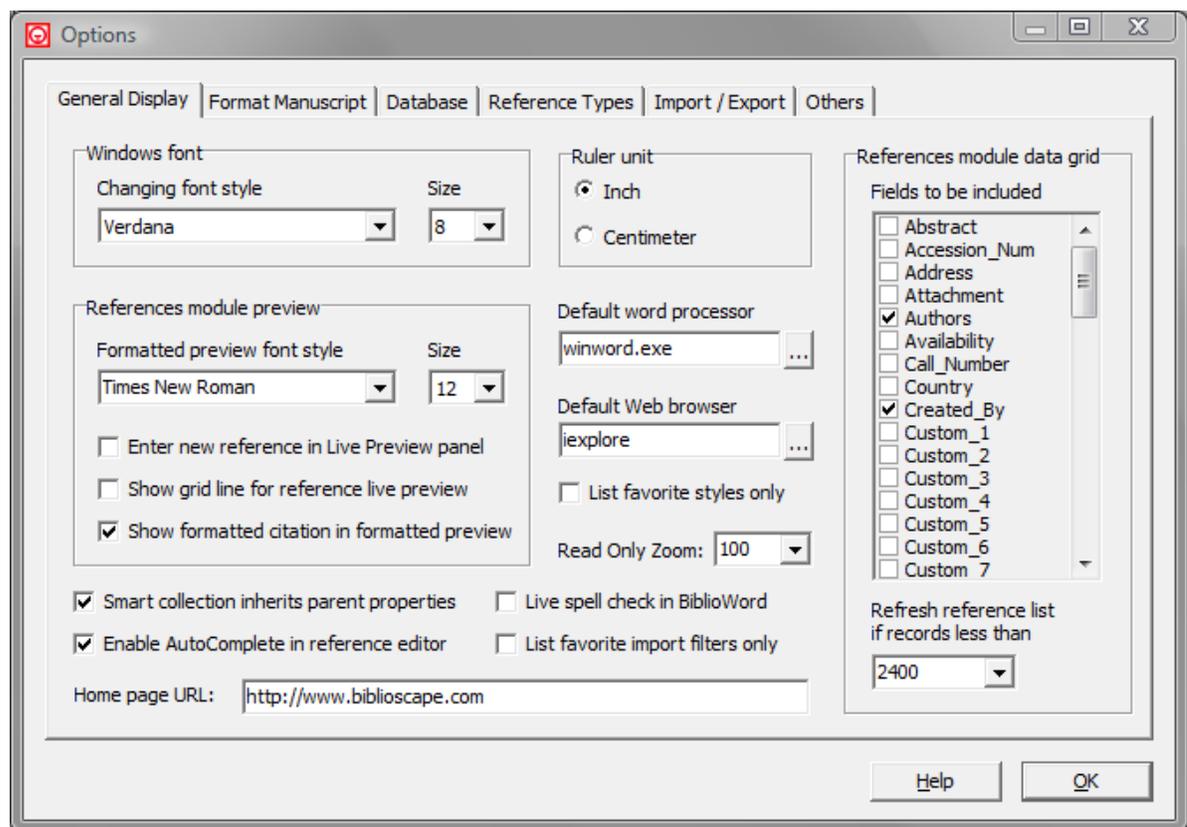
### BiblioRemote

- BiblioRemote server allows a group of users to open the same database in Biblioscape. Users can open the database from the same Local Area Network (LAN) or the Internet.
- Minimum setup is required. The administrator can send end users a configuration file that can be opened to access the remote database.
- Each individual user can be assigned different privileges to access Biblioscape database.

## 1.4.6 Biblioscape options

The Biblioscape Options window lets you change settings for the display, formatting manuscripts, the database, reference types, import and export, and others. To access the Options window, please go to the menu command "Tools | Options".

### General Display



**Window font:** Biblioscape is set to use the font "Verdana" with size 8 by default. You can change this by going to the "Windows Font" section and selecting the font name and size. The text used by

Biblioscape will be changed accordingly. All record editor windows opened subsequently will use the new font settings.

**References module preview:** Changes the font and size used in the Formatted Preview pane of the References module.

**Enter new reference in Live Preview panel:** If checked, when the New Reference command is clicked, the reference editor window will not be displayed. Instead, the user can add new records in the reference list window.

**Show grid line for reference live preview:** If checked, grid lines will be displayed in the reference live preview.

**Show formatted citation in formatted preview:** In the References module formatted preview pane, the formatted bibliography is always shown. If the box is checked, the formatted citation part will be shown as well. For most styles, the formatted citations will display an author-year or a number. For footnote styles like those starting with "\*" in the style name, you may want to have this box checked, so formatted citations in footnotes can be shown in the preview pane.

**Live spell check in rich text editor:** If checked, a squiggly line will be displayed under misspelled words in rich text editors, such as notes in the Notes module and the document field in the References module.

**Enable AutoComplete in reference editor:** In Biblioscape's reference editor, for certain fields -- "Authors", "Journal", and "Keywords" -- the program will look up and display the closest match while you type. If the suggested match is what you want to type, you can just press Ctrl+K to auto complete the word or phrase. Some people may find this feature annoying, so AutoComplete can be turned off by unchecking this box.

**Home page URL:** When you use Biblioscape's integrated browser, the URL entered here will be the first page opened.

**Ruler unit:** The ruler unit used in the rich text editors. The default is set to Inch for US users.

**Default word processor:** When a RTF file needs to be opened outside Biblioscape, the word processor entered here will be used.

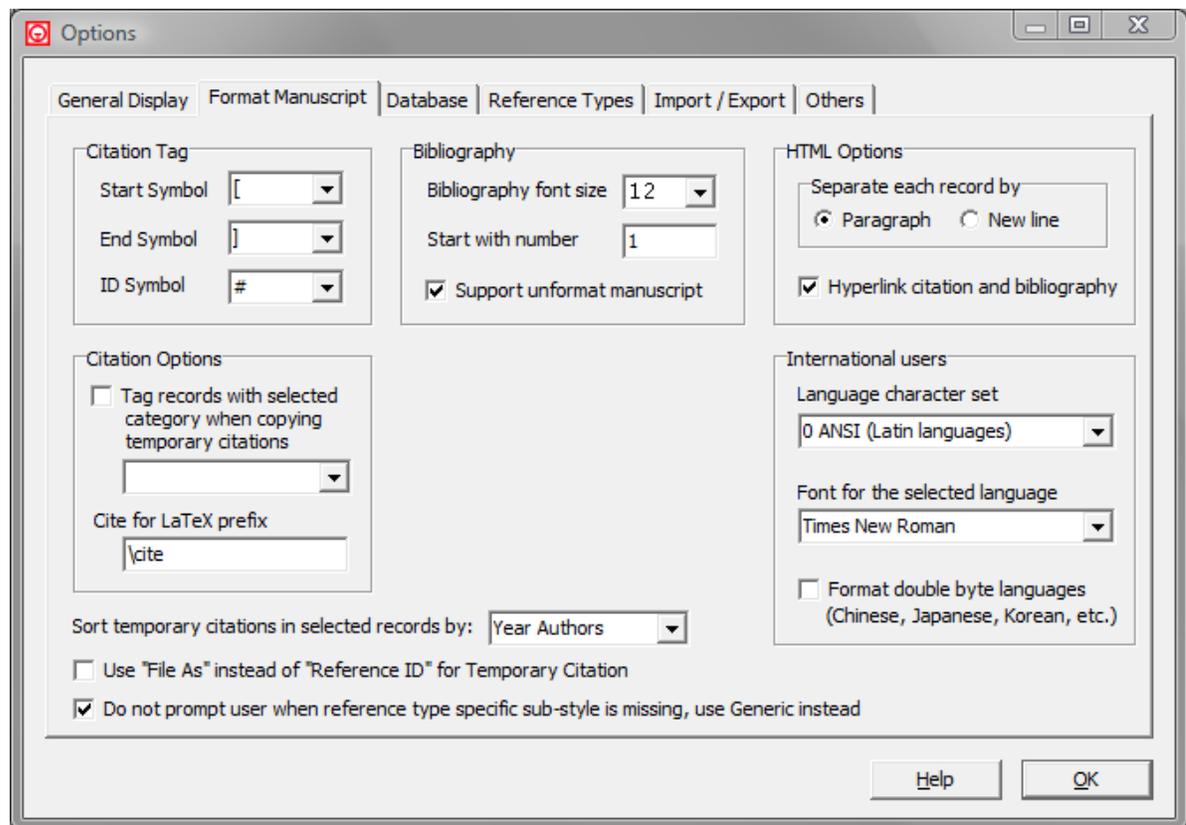
**Default Web browser:** When clicking a URL in Biblioscape, the web browser entered here will be used.

**List favorite styles only:** If checked, only output styles that are marked "Favorite" will be displayed in the styles pick list in the main toolbar and the Format Manuscript window.

**List favorite import filters only:** If checked, only import filters that are marked "Favorite" will be displayed in the import filters pick list in the Import References window.

**References module data grid:** In order to boost performance, Bibloscape only retrieves a partial list of available fields in the reference table. If the data fields you want to display in the reference list are not available by default, you can add them by checking the box before their names in the Fields to be included list. When you close a reference editor, the changes made are reflected only after the list is refreshed. To boost performance, the list is not refreshed if the number of references in the list is more than the number you set here under Refresh reference list. The default number is 2400.

### Format Manuscript



**Citation tag:** This section specifies symbols used in temporary citations. Normally, you don't need to change them unless you have "[...#...]" text inside your document. This text will cause Bibloscape to misinterpret temporary citations unless you change the citation tag here.

**Start Symbol:** The start symbol is used to enclose temporary citations.

**End Symbol:** The end symbol is used to enclose temporary citations.

**ID Symbol:** The ID symbol is used before a Reference ID inside a temporary citation.

**Citation options:** When you insert a temporary citation into a manuscript, you may want to tag the reference at the same time so you can easily see which references are cited in a given manuscript. To do this, please have the box "Tag records with selected category when copying temporary citations" checked. Before opening "Tools | Options", create a new category name for your manuscript. Now go to "Tools | Options", click on the "Format Manuscript" tab and select the category you have just created in the combo box under "Tag records with selected category when copying temporary citations". References will be stamped with the selected category when you insert them as temporary citations or copy them as temporary citations. For LaTeX users, Biblioscape can generate temporary citations for LaTeX. Go to the menu command "Tools | Customize". Click the "Commands" tab, and select "Edit" as the category. Drag and drop the command "Cite for LaTeX" to the toolbar or menu system. On the Options window, enter the text to appear before the LaTeX temporary citation. The default is "\cite" as Cite for LaTeX prefix, so when you click the command "Cite for LaTeX", the temporary citation in the Clipboard will be, for example, "\cite{MCCLEARY:1986:ID78}". You can then paste it to your LaTeX editor. You can export references as LaTeX reference files by going to "File | Export". On the "Tagged" tab, select "BibTeX -- LaTeX" as the export type.

**Sort temporary citations in selected records by:** When you select select references and copy or insert them as temporary citations, Biblioscape will sort them according to the setting selected here. The options are: Authors Title, Authors Year Title, Years Authors, No Sorting.

**Use "File As" instead of "Reference ID" for Temporary Citations:** By default, Biblioscape uses the Reference ID to identify each reference during formatting. Since the Reference ID number is only unique in the database in which it resides, the same reference may have a different Reference ID in a different database. You can use text to uniquely identify each reference if you keep more than one database. If this box is checked, Biblioscape will use the text in the field "File As" in temporary citations when you click the menu command "Edit | Temporary Citation".

**Do not prompt user when reference type specific sub-style is missing, use Generic instead:** In most Biblioscape output styles, not all reference types are included. During formatting, if Biblioscape finds a reference type that is not included in the output style you picked, Biblioscape can prompt you or continue to use the generic one without prompting, depending on

this checkbox setting.

**Bibliography:** This section controls the appearance of formatted bibliographies in a formatted document.

**Bibliography Font Size:** This is the font size used in the reference section of a formatted document. If you format your manuscript chapter by chapter and want to start with a different number for each chapter, you can enter the number in the Start with number box.

**Support unformat manuscript:** Biblioscape can convert formatted documents back to their original state with temporary citations. This is achieved by using hidden text. Some simple word processors like Windows WordPad don't support hidden text. If you use such a word processor, uncheck this box so hidden text won't be used. If this box is unchecked, you won't be able to convert a formatted document back to its unformatted state with temporary citations. If so, you should always work on the unformatted document and format the manuscript only when it's ready to be submitted. Normally you don't need to uncheck this box, because almost all word processors support hidden text.

**HTML options:** This section controls how Biblioscape formats references in HTML format.

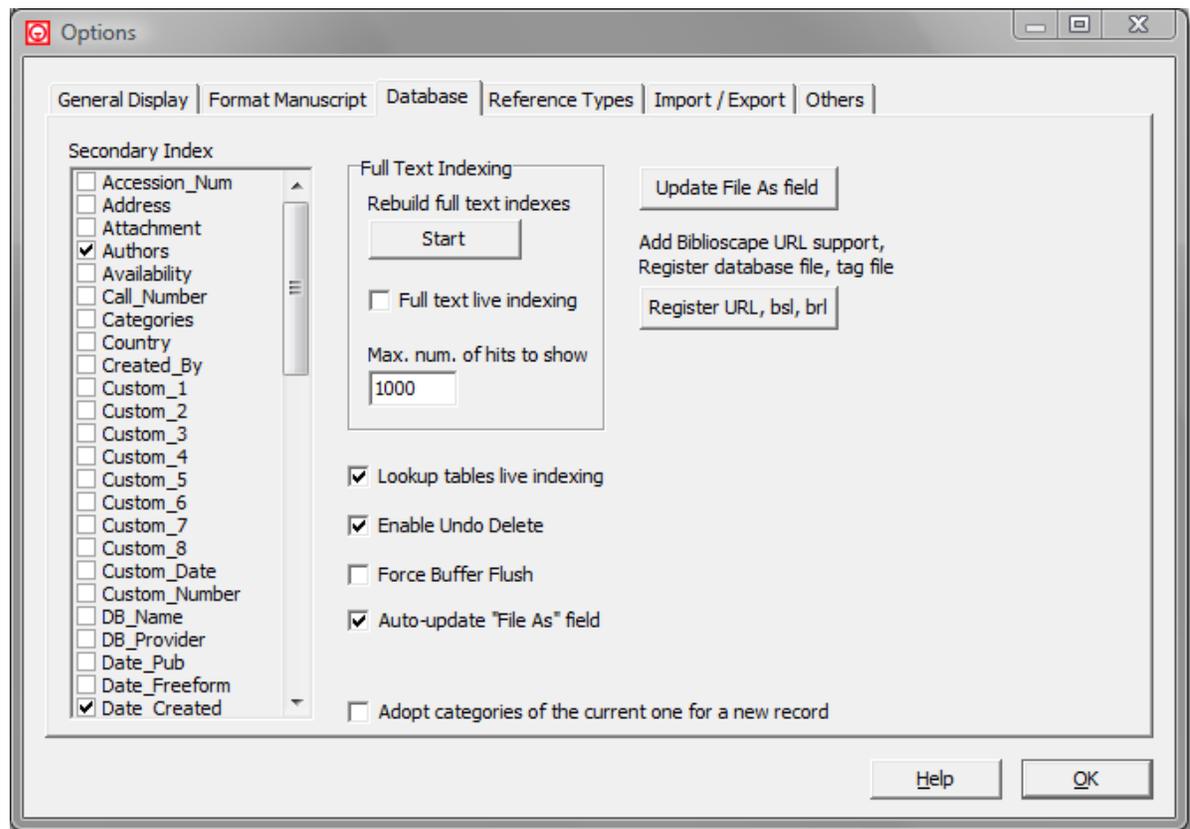
**Separate each record by:** Specify whether to separate each reference in the References section by a paragraph or by a new line. Separating by paragraph will cause a blank line to be displayed between each reference.

**Hyperlink citation and bibliography:** Check this box to let Biblioscape create a hyperlink between a citation and its corresponding reference, allowing the reader to jump to the reference in the bibliography section by clicking on the in-text citation.

**International users:** If you use Biblioscape to format manuscripts not written in a western European language, you need to change the Language character set from "0 ANSI (Latin languages)" to another character set. All major languages are supported, including Chinese (traditional or simplified), Japanese, Russian, Arab, Hebrew, Eastern European, Korean, etc. The bibliography generated by Biblioscape uses Times New Roman as the default font. You can change the Font for the selected language using the combo box. You especially need to change this after the language character set is changed because the current font may not support the language character set you selected. If "0 ANSI (Latin languages)" or "1 Default " is selected as "Language character set", the formatted citation will adopt whatever font is used by the preceding text. If another character set is selected, Biblioscape will use the "Font for the selected language" instead of the font of preceding the text for the formatted citation. When formatting documents in east

Asian languages, the author's name format shouldn't be changed. You should keep the box "Format double byte languages (Chinese, Japanese, Korean, etc.)" checked. You have to remember to uncheck it when formatting documents in European languages. Otherwise, the author name format will always stay the same.

## Database



**Secondary Index:** Secondary indexes are used to sort references in the correct order in the "Retrieve All" mode. If you customize the data grid to include other fields, you can add extra secondary indexes for a field by checking the box before the field name. If you don't use "Retrieve All" often, or don't want to sort references under the "Retrieve All" mode, you can remove secondary indexes by checking off the box before the field name so you can save some disk space.

**Full Text Indexing:** Biblioscape can index each word of a record in References, Notes module, etc. so that you can find what you want quickly even when your database grows large. Rebuild full text indexes: Sometimes, the full text indexes need to be rebuilt. If you get error messages like index buffer corruption, you need to rebuild the full text indexes. Click the button "Start" to rebuild it. Full text live indexing: By default, Biblioscape will update the full text index while you add, delete, or edit a record. In certain circumstances, you may want to disable live indexing. For example, if you are going to import several thousands of records into the Biblioscape References

module, you can boost the import speed by temporarily disabling live indexing. Max num. of hits to show: When you search references or notes by using indexed search, you can limit the number of records to display. For example, if more than 1000 records meet your search condition, you may want to refine the search instead of displaying them all.

**Lookup tables live indexing:** Biblioscape automatically parses the Authors and Keywords fields, and puts individual authors and keywords in a separate table. This information is used in AutoComplete and lookup operations. In certain circumstances, you may want to disable live indexing. For example, if you are going to import several thousands of records into the Biblioscape References module, you can boost the import speed by temporarily disabling live indexing.

**Enable Undo Delete:** By default, when you delete a record, Biblioscape puts it into the Recycle Bin. So you can recover it later if you made a mistake. Uncheck this box if you want Biblioscape to delete a record permanently instead of moving it into the Recycle Bin.

**Force Buffer Flush:** When you add new records or made changes to existing records, the Biblioscape database engine will cache them into your computer's memory instead of writing to the disk immediately. This will boost performance, but in the case of a crash, Biblioscape may not be able to write changes in the cache to the disk. This will result in data loss entered in your last session. If you want Biblioscape to write changes immediately to the disk without caching, have this box checked.

**Auto-update "File As" field:** In the references module, each record is stamped with the author, the year, and part of the title to be uniquely identified. The File As text can be used to identify a reference instead of a Reference ID in a temporary citation so that when the same reference is exported from one database to another, the temporary citation can still correctly identify the reference in spite of a changed Reference ID. If you want Biblioscape to have this field updated automatically, have this box checked. If you want to manage the "File As" field by yourself, leave this box unchecked.

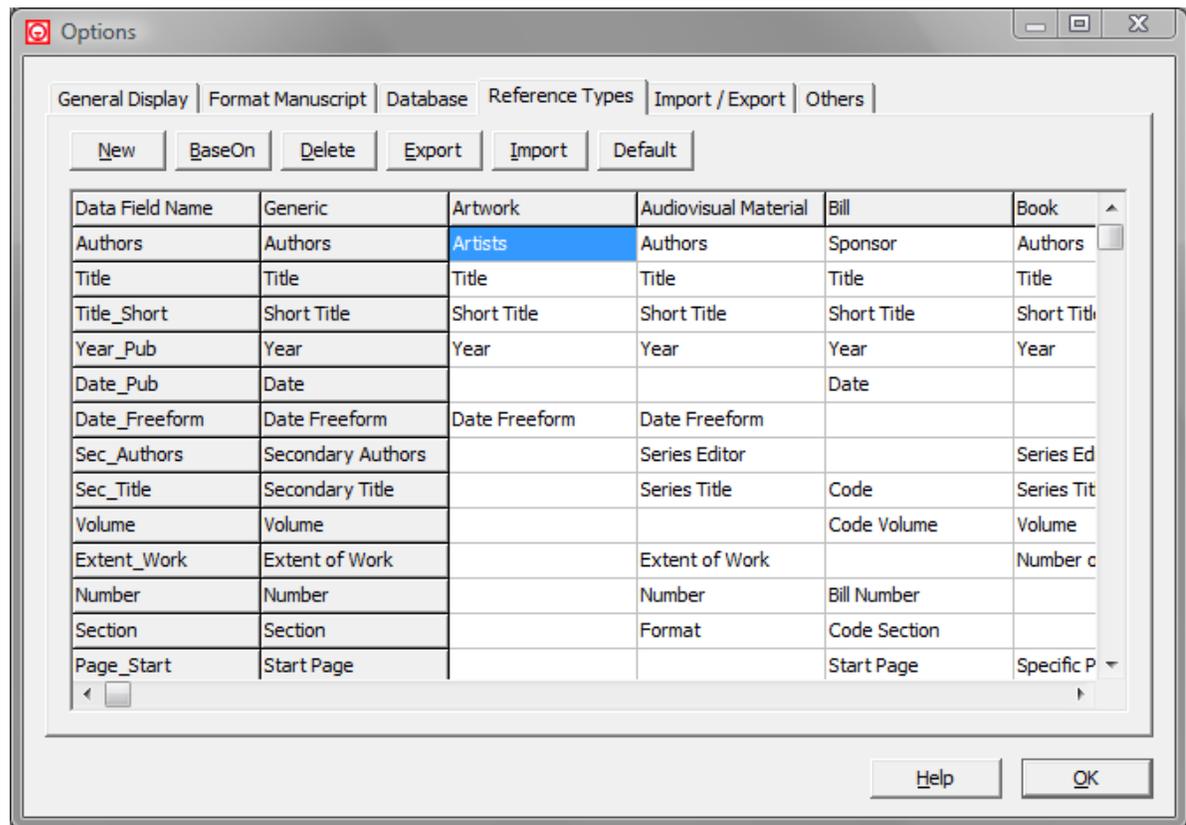
**Update File As field:** Click this button to make Biblioscape regenerate the "File As" text for all reference records. All "File As" text will be removed first; Biblioscape will regenerate them according to the current data. This is useful when you switch from the user controlled "File As" field to the Biblioscape generated one.

**Register URL, bsl, brl:** Biblioscape supports URL in the form "biblioscape://...". From another application such as Word, you can enter something similar to `biblioscape://RefID=23`. When this URL is clicked, Biblioscape will be automatically started and the reference with ID 23 will be shown in the editor. Biblioscape will try to automatically enable this when you run Biblioscape for the first

time, but this action needs Windows admin user privileges. If your Windows account doesn't have that privilege, Biblioscape won't be able to enable this feature. You can have a Windows admin user run Biblioscape and click this button to enable this feature. This action will also register Biblioscape database files \*.bsl and \*.bsl, as well as the Biblioscape Tag File \*.btf so that when those files are double clicked, Biblioscape will start automatically and have the clicked database or file opened.

**Adopt categories of the current one for a new record:** If you organize records (references, notes, etc.) by categories, you may want to tag a new record with the same set of categories as the current one. This will save you time because you don't have to tag every new record when it is created.

### Reference Types



A Reference database contains references from a variety of different sources, such as books, journal articles, and newspaper articles. Each type of reference has its own set of data fields. For example, a "Journal Article" does not have an editor, but a "Book Edited" has editors. Biblioscape has 27 pre-defined reference types. All these can be edited, and you can also add more reference types if needed.

All reference types and definition files are located under the "Reftypes" sub-directory. You should not edit these files with a text editor. To be safe, you should only use the Biblioscape customized tools to edit them. Of the 27 reference types, all but the Generic type can be modified. Changes made to the Reference Types apply to all databases opened on that computer. The Reference types definition determines which data fields are available for that type in the reference editor "User Defined" tab.

### **Default reference types**

If you have messed up your reference types customization or want to start over from a clean reference types installation, first quit Biblioscape and delete all files under the "reftypes" folder. Click [here](#) to download the default reference types in a zip file. Then, unzip it to the "reftypes" folder. The next time you start Biblioscape, the default reference types will be used.

### **Move database to another computer**

If you move your database to a different computer, the Reference Types definition may be different from yours. If the reference type definition is not available for a reference, the Generic field labels will be used instead. There is an easy way to move the reference types data along with your database and still not overwrite the reference types definition on the other computer. You can copy the "Reftypes" folder along with your database. If Biblioscape finds a "Reftypes" folder under the database folder, the reference types definition will be loaded from that folder instead of the one under the Biblioscape root directory.

### **Reference Types & Data Entry**

When entering a new reference, the first thing to decide is its reference type. The chosen reference type specifies which fields appear in the "User Defined" tab of reference editor. When you change the reference type, both the number of fields displayed and the field labels may be different.

### **Customize Reference Types**

To customize a reference type's definition, click the menu command "Tools | Options...". Click the "Reference Types" tab. The first column lists the field names used in the database table. The second column lists the field labels for the type "Generic". Neither of these columns can be edited. For the rest of the reference type columns, you can change the field labels. If you leave the field label blank, that data field won't be displayed in the "User Defined" tab of the reference editor.

### **Add a new reference type**

Click the "New" button to add a new reference type. First, give the new reference type a name. After a new column is created, you can change the field labels, or change it to blank if you don't want to show that field. If you want to create a new reference type that is similar to an existing one, click on the "BaseOn" button, then make changes.

### **Delete a reference type**

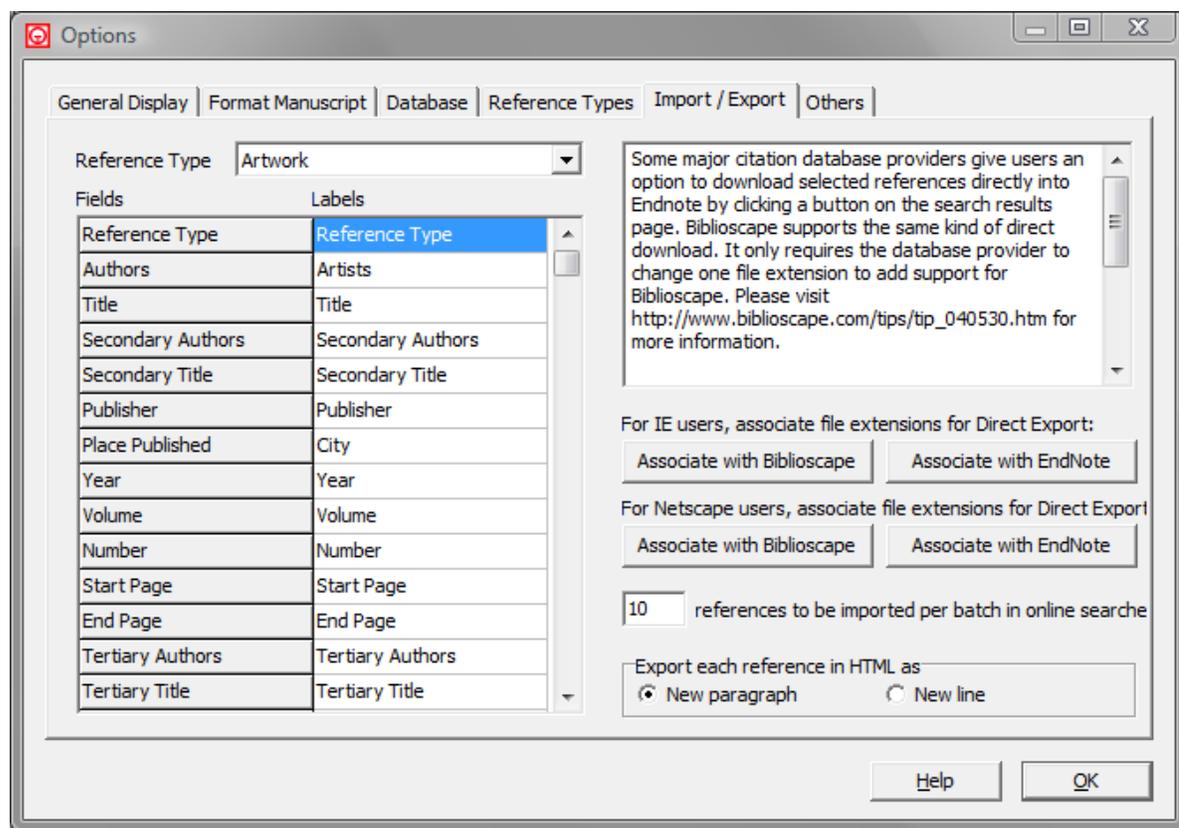
You should not delete one of the pre-defined reference types. If you want to delete a reference

type you just added, select any cell in that column and click the "Delete" button.

### Import and Export reference types

You can export the whole reference types definition table as a delimited file. Then, open that file in a spreadsheet program like Microsoft Excel. Make changes, and then import it back.

### Import / Export



When defining an import filter, you need to map tagged fields from the importing file to each data field in the Biblioscape reference table. In the import filter editor, each data field label of a specific reference type can be customized. You normally don't need to customize the field labels.

### Export each record in HTML as

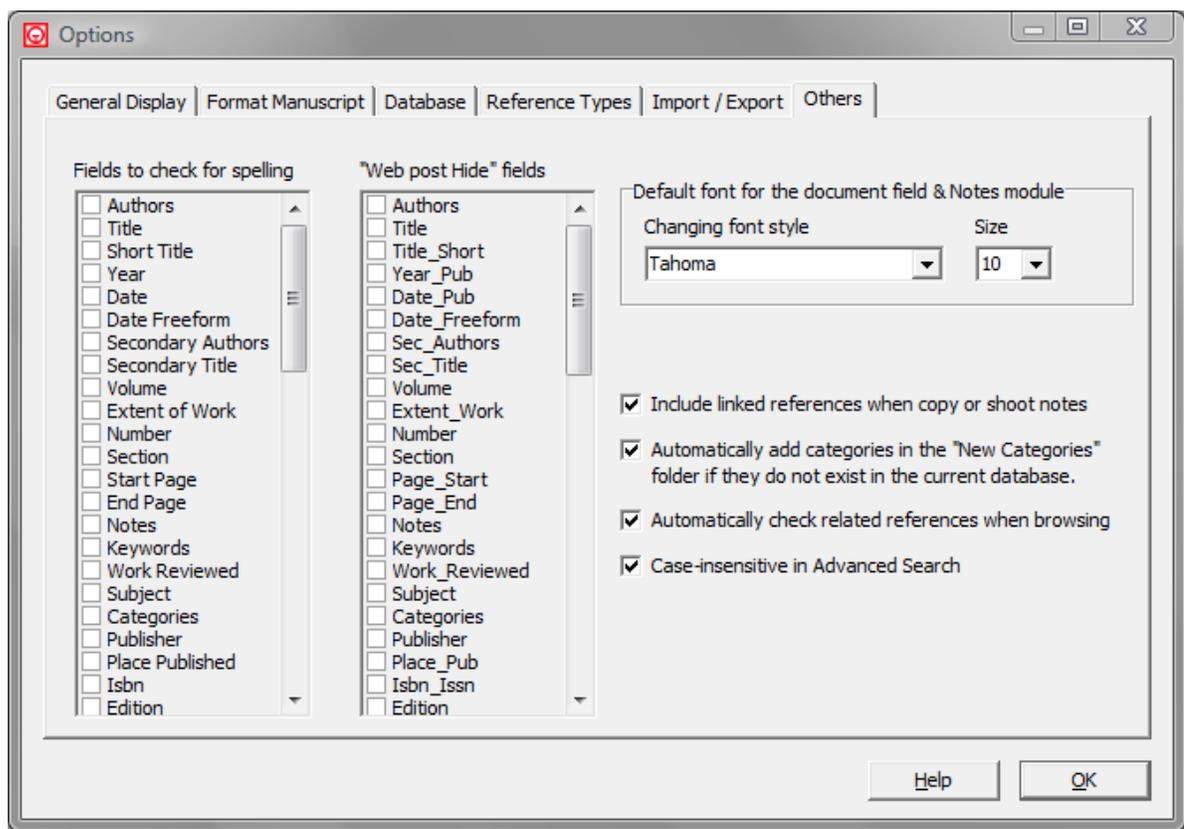
When exporting references in HTML format, you can choose to separate each reference by a paragraph or by a line. If the references are separated by a paragraph, there will be a bigger margin between each reference.

### Direct Export support

Some web based citation database providers display a download button to send your search results directly into your bibliographic software. Biblioscape supports such a feature even if Biblioscape is not listed on their web page. Many citation database providers, such as Highwire Press, Ovid, OCLC, ProQuest, the ISI Web of Science and others, provide a direct export of references into

bibliographic software. You can click the button "Associate with Biblioscape" to add direct export support in Biblioscape. After this, when you click the "Download to EndNote" button in a web page, those references will be imported into Biblioscape instead of EndNote. You don't need EndNote to be installed for this to work. If you already have EndNote installed, you can click the "Associate with EndNote" button when you want the direct export to be associated with EndNote instead of Biblioscape. You can switch direct export between these two software in case both are installed. If you use Netscape instead of IE, please click the buttons below with the same label.

## Others



**Fields to check for spelling:** Biblioscape has built-in spell check. For records in the References module, you don't need to check the spelling for all fields. Some fields like "Year", "Volume", "Number", etc. don't need to be checked. You can control which fields to check for spelling errors by checking the box before the field name.

**"Web post hide" fields:** The Biblioscape web server "BiblioWeb" can post your bibliographic database live on the Web. Some users may not want to make all fields available on the Web. For example, a professor may want to hide his or her notes about a reference while posting his or her bibliographic database for his or her students. You can use this list box to control which data fields are to be hidden when posting on the Web. In order to hide certain fields, check the box "Web Post

Hide" in the tab "All Fields" of the reference editor. Only references with the "Web Post Hide" value checked will have Web Post Hide rules applied to them. This only applies to the reference record display form, not the edit form.

**Default font for the document field and notes module:** You can change the default font and font size used in rich text fields in Biblioscape. These include the Document field in the References module and the Notes field in the Notes module. The default font is Verdana, size 10. If you need to enter text in another language most of the time, you may want to select a font that supports the language you use.

**Include linked references when copy or shoot notes:** If checked, link references will be included as temporary citations at the end of the note when executing the command "Edit | Shoot Note".

**Automatically add categories in the "New Categories" folder if they do not exist in the current database:** Users are allowed to enter categories directly in the Categories field of references, notes, tasks, and charts. If checked, Biblioscape will check if the directly added categories already exist in the categories table. If not, Biblioscape will add these categories to the categories folder "New Categories".

**Automatically check related references when browsing:** If checked, Biblioscape will go to the Internet and look for related references as well as freely available full text when browsing references.

**Case-insensitive in Advanced Search:** If checked, all string searches when using Advanced Search will be case-insensitive. For example, if users search the word "join", both "Join" and "join" will be considered a hit.

## 1.5 Multi-user environment

Biblioscape supports a multi-user environment in several ways. The Biblioscape database can be shared by many users with a desktop interface as well as a web interface. The first question should be: Which interface do you plan to use? Desktop interface gives you more features, but costs more. Web interface doesn't require the installation of Biblioscape, but has limited features. If needed, you can have a mixed solution.

### [Share a database using desktop application](#)

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- Pros: All features are available (depends on which edition is purchased)
- Cons: Each user needs to purchase a copy of Biblioscape. When opening a remote database,

performance becomes slow.

Share a database on a mapped drive (not recommended): This is the easiest way to share a database among users. You simply put your database on a shared drive. This shared drive is mapped to a drive letter in each user's PC. The end users just need to run Biblioscape and go to "File | Database | Open Database". Go to the shared drive, find the Biblioscape database directory, and open the \*.bsl file. Although setup is very easy, there are a couple of drawbacks with this approach. When your database becomes large, the application will slow down. Because Biblioscape needs to load the whole database from the file server to your local machine, each time a query is run, it generates a huge amount of network traffic.

Share a database through BiblioRemote server (recommended): Instead of opening a shared database directly on a shared drive, we recommend using BiblioRemote server. BiblioRemote is included with Biblioscape installation. You can find it under the "...\Biblioscape x\BiblioRemote\" folder. BiblioRemote is a database server. Users can open a remote database located on the LAN (Local Area Network) or on the Internet. All the database operations are handled by the BiblioRemote server instead of each copy of Biblioscape. Compared to the shared drive approach, it is more robust and can scale well. When used in a LAN, it gives good performance and it won't degrade rapidly as the size of your database grows.

#### [Share a database using web browser](#)

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- Pros: No installation needed for end users, so it cost less. Fast performance and easy to learn.
- Cons: Only a limited feature set is available.

If your users only have a simple needs regarding the shared database, the web interface solution can be attractive. No software installation is needed. You only need to run BiblioWeb server which is installed with Biblioscape under the "BiblioWeb" sub-directory. All you need to do is to run BiblioWeb.exe or set it up as a Windows service.

[Click here to learn more about BiblioWeb.](#)

[Click here to learn more about BiblioRemote.](#)

### **1.5.1 Install Biblioscape on a network drive**

If there are several users in your organization and you don't want to install Biblioscape on each user's machine, you can simply install Biblioscape on a network drive and let everyone run Biblioscape from there. First, download the trial copy (a self-extracting zip file) from the Web at <http://www.biblioscape.com/download.htm>. Double click it to run and unzip it to a new folder on your network drive. That is all you need to do for installation. If you have already installed

Biblioscape on a local machine, you can simply move the Biblioscape folder from your local machine to the network drive because running the installer is not needed for Biblioscape installation. Users can go to the network drive and double click biblioscape.exe to run it. A network drive may be mapped to a drive letter in the user's machine. The end user can drag and drop biblioscape.exe to his or her desktop using the right mouse button and select "Create shortcut here". In the future, users can just double click the desktop shortcut icon to run Biblioscape.

Once installed, if you want another user to run Biblioscape from another machine in your network, please set the Biblioscape folder to be shared. You can also make your Biblioscape folder on your machine a shared folder. Select the Biblioscape installation folder, click the right mouse button and select Properties. Go to the "Sharing" tab and check the boxes "Share this folder on the network" and "Allow network users to change my files". Other people on your LAN can browse to your shared folder and run Biblioscape from there.

If you want to install Biblioscape on a network drive and let several users run Biblioscape, please be aware that Biblioscape is licensed to an individual user, not a single machine. Each user needs to purchase Biblioscape and register it.

### **1.5.2 Broadband router configuration for BiblioWeb and BiblioRemote**

Most Web users in the US access the Internet through broadband connections (DSL or cable). In such cases, your Internet service provider (ISP) usually assigns a static IP based on the hardware ID of your DSL or cable modem. With a broadband connection, it is possible to run a BiblioWeb or BiblioRemote server on your home PC, but there are extra steps to be taken to make it possible.

You most likely have a router connected to the DSL or cable modem. All your computers and other internet devices are connected to the router. To the outside world, all they see is the router. It controls the traffic between the Internet and your local area network (LAN). When you connect a PC to the router, the router will assign an IP address to that PC based on its hardware ID. If you run a BiblioWeb or BiblioRemote server on that PC, you need to tell the router to direct all the traffic on the port used to the relevant PC. You may have routers of different brands, but the setup is similar. Most support setup by using a Web browser. Open your browser and enter <http://192.168.0.1> (or whatever the LAN IP address is used for the router). You need to know the admin login name and password. This information can be found in your router's manual. Once you are logged in, there should be a hyperlink assigning incoming traffic from the Internet for different ports to the computers of your choice. You have to give a name, choose the port number, and select the computer to which the traffic will be directed on that port. For BiblioWeb, enter port 80 and select the computer where BiblioWeb will be running. For BiblioRemote, assign both port 12005 and 12006 to the computer where BiblioRemote will be running because port 12005 is used for database activities and 12006 is used for admin traffic.

Once you have configured the router to direct traffic on the above ports to the right computer, people on the Web can use your BiblioWeb or BiblioRemote server. If you are running Windows Vista, make sure the ports needed are not blocked by Windows Firewall. See also: [Open a port in Windows firewall](#).

### 1.5.3 Biblioscape servers

Biblioscape Server includes two server software: BiblioRemote and BiblioWeb. Both server software are designed to let you share a Biblioscape database among users. They are installed with Biblioscape, so no separate installation is needed. You can test both servers in the Biblioscape trial copy. Once registered, Biblioscape Pro includes one concurrent license for both servers. It can be used to provide single user remote access. For example, you can run the server in your work machine and access your database from a home computer. Biblioscape Librarian edition includes 3 concurrent licenses. You can purchase more concurrent licenses if needed.

#### [BiblioRemote Server](#)

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If there are several Biblioscape users in your organization and you all want to open a shared database, BiblioRemote server is the ideal solution. Although you can open a shared database by putting the database folder on a shared drive in your Local Area Network (LAN), there are disadvantages in doing so. First, the performance of common operations in Biblioscape will be poor when the size of your database increases. Second, there will be a huge burden on your network when opening a large database this way. Both problems can be solved when you open a shared database through BiblioRemote server. With BiblioRemote, you also have more control over user privileges. When used in a LAN environment, you will achieve good performance even when opening a large shared database. [Click here to learn more about BiblioRemote Server and its setup](#).

#### [BiblioWeb Server](#)

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BiblioWeb is designed to provide web access to your Biblioscape database, so others can search, browse, and even add records to your Biblioscape database without installing Biblioscape. All they need is a web browser. As a BiblioWeb administrator, you can decide who can do what to your database by assigning Read or Write privileges. Unlike other web based application which require expert knowledge to setup and maintain, BiblioWeb can be run by anyone. All you need to do is a double click of BiblioWeb.exe. The trade-off is very limited customizing in BiblioWeb. If you have an in-house web application development team, BiblioWeb may not be the best solution. You may achieve better results by using Biblioscape ODBC driver to access the database, and integrating Biblioscape with the rest of your web site. If you are a regular user and want to get web access to your Biblioscape database easily, BiblioWeb server is the way to go. [Click here to learn more about BiblioWeb Server and its setup](#).

## 1.6 Getting support

Biblioscape technical support is provided at the user forum. We recommend that users post their questions to the Biblioscape user forum, which is monitored by CG Information staff. This is a web based discussion, bug report, and feature request system. It provides a structured and formal environment where user problems are visible to all other users. Bugs are not hidden from customers or "swept under the rug", they are recognized for what they are - flaws in the software that need immediate attention and resolution. This system is also consistent with CG Information's e-mail only support policy and hopefully provides a comfortable support environment for all customers.

If you have questions that you don't want others to see, need to send files to technical support, or simply don't like to use the forum, you can send an e-mail to [support@biblioscape.com](mailto:support@biblioscape.com). Emails will be answered within 48 hours. Email based support has lower priority than user forum based support.

## 1.7 Purchasing Biblioscape

A fully functional trial copy of Biblioscape can be downloaded at [www.biblioscape.com](http://www.biblioscape.com). This evaluation copy can be turned into a registered copy by a simple registration process. Biblioscape can be purchased on the Web, by e-mail, phone, fax or mail. There are 4 editions you can purchase, and each edition includes different modules. Please read the feature matrix to see what features are included under each module. Registered users can upgrade from one edition to another by paying the difference in price.

	Lite	Standard	Professional	Librarian
References module	✓	✓	✓	✓
Notes module		✓	✓	✓
Categories module		✓	✓	✓
Tasks module			✓	✓
Charts module			✓	✓
Composition module			✓	✓
BiblioWeb server			✓	✓
Library module				✓

Evaluation Edition: The evaluation edition has all the features of the Librarian Edition, but after 100

uses, a nag screen will appear every time a user browses to a different record.

### Price Information

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Pricing information can be found at our web site: [www.biblioscape.com](http://www.biblioscape.com)

### Where to order Biblioscape

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You can order Biblioscape by credit card, check, money order, etc. Please go to our purchase Web site for detailed information. After we have received your purchasing information, we will ask for the following information to generate a registration key: First and last name, as well as your machine ID. Start Biblioscape and go to "Help | About Biblioscape" to find your machine ID. We will send you a username and serial number by e-mail. You can then convert your Biblioscape evaluation copy into a registered copy easily without re-installation.

### How to register

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Once you have received your user name and registration key, go to the menu command "Help | Register Biblioscape". Enter the username and the registration key, and click the "Register" button. Biblioscape will prompt you with a thank you screen for a successful registration.

**Registration**

**Biblioscape 8**  
Copyright © 1997-2009 CG  
Information. All rights reserved.

Field of Interest  
Select One

User Name

Serial Number

Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction and distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.

Register  
Cancel  
Help

## 1.7.1 Company information

### [Company Information](#)

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CG Information was founded in 1997 by scientists who thought that existing bibliographic software programs were not advanced enough to address the needs of researchers in the age of the Internet. Our goal is to build a first class bibliographic software for the 21st century. Since the first release of Biblioscape in 1998, it has become a research information manager for collecting references, taking notes, formatting papers, writing theses and books, managing tasks, and publishing on the Web. CG Information is located in Alpharetta, Georgia, a suburb of Atlanta.

### [Contact Information](#)

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Phone:

Email only

Fax:

+1 678-417-5332

Email:

Support: [support@biblioscape.com](mailto:support@biblioscape.com)

Sales: [sales@biblioscape.com](mailto:sales@biblioscape.com)

Address:

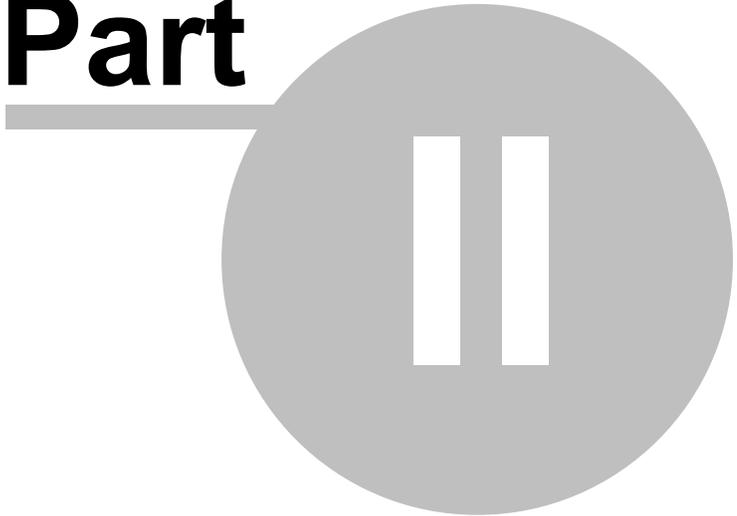
740 Granbury Way

Alpharetta, GA 30022

# Quick start tutorial

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



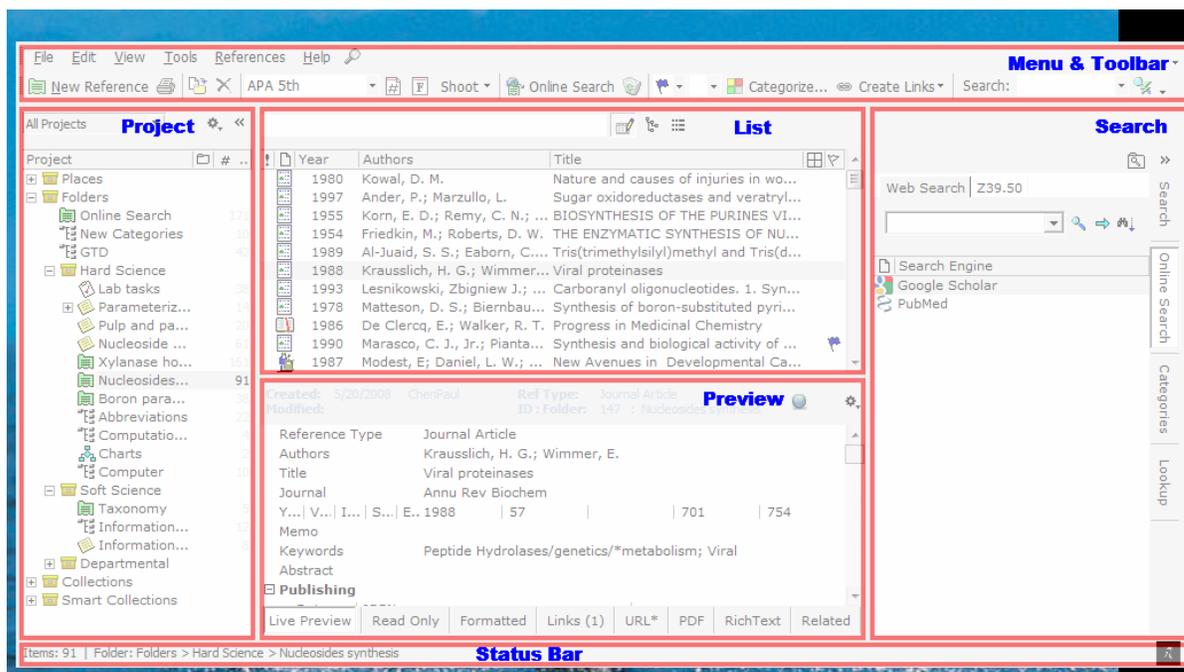
## 2 Quick start tutorial

Let's start with a quick overview of how to use Bioscience. The best way to do this would be carrying out a research project using Bioscience, and submitting a paper in the end. The idea here was to give an example of a complete workflow from start to finish. It will show you how Bioscience can be used to collect references, take notes, organize information, and format papers in a typical research paper writing project. Bioscience is a versatile program; there are many ways it can be used to organize research information. The quick start tutorial will show you how one researcher uses Bioscience for a small and simple project. The workflow that is described in this tutorial will provide a clear insight into what Bioscience does, how it can be used to help speed up research, how best to organize your research information, and how it can save you time when generating citations and a bibliography.

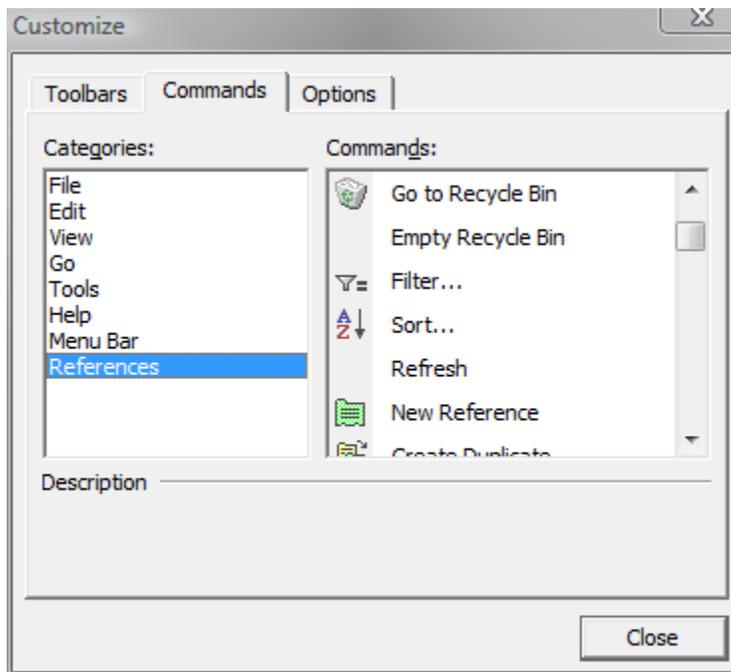
In the following tutorial, we will first create a new Bioscience database. We will use the paper "Apes and Language: A Review of the Literature" (Source: Diana Hacker, Boston, Bedford/St. Martin's, 2004) as an example. We will go through different stages of a research project from collecting references, taking notes and building outline, to the final formatting.

### 2.1 Introducing the Bioscience interface

Bioscience interface can be divided into 6 areas. Two of them are standard among all Windows applications. They are the menu and toolbar at the top, and the status bar at the bottom.



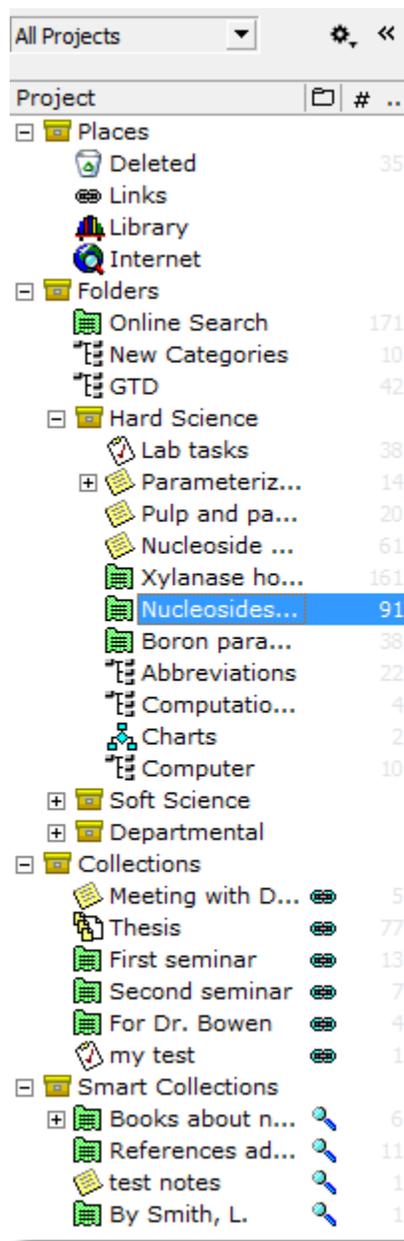
## Menu &amp; Toolbar



Biblioscape menus and toolbars are all customizable. To customize, click the menu command "Tools | Customize...". Go to the "Commands" tab. There, you can drag and drop any command to the menu system or toolbar.

Some menu commands are associated with a shortcut which is listed in the menu display. If the cursor stays on a toolbar button longer, a popup hint will be displayed about the button and its associated shortcut.

## Project



The project tree is the control center in Biblioscape user interface. All your database contents are organized under the project tree, and you navigate to different modules from here. Biblioscape is designed to handle 6 kinds of information objects: references, notes, tasks, charts, categories, and library. The library module is designed to manage a small research library. It has its own sub-modules and is treated separately from the other kinds of data. For the other 5 kinds of information objects, each is represented by an icon and stored in a tree structure in the project panel.

There are 4 root level containers: Places, Folders, Collections, and Smart Collection. Under Places, you can go to the Recycle Bin in Biblioscape where all deleted records can be restored. You can also go to the Links to see all the link relationships between records. Clicking on the Library will open the library module. Clicking on Internet will let you use an integrated Web browser.

Under "Folders", you can have different kinds of folders for each module. They are: references, notes, tasks, charts, and categories. Folders are the places where records are stored. A record has to be under a folder, and it can only be under one folder. It is like its physical residence.

Under "Collections", you can also have different kinds of collections for each module just like folders, but a collection is only a virtual place for records. A record doesn't have to be in a collection, and it can be in many collections if needed. A collection is a more flexible way to organize your records for different projects. Since it is under the project tree, collections should only be used to manage projects. To classify records, Biblioscape provides a more flexible tool: categories. We will talk about using categories to organize records later.

Under "Smart Collections", you can keep all your saved searches. You can save any reusable search under Smart

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Collections so you don't have to build the query again and again.

### List

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The list panel is at the top of the center panel. It display all the records in the project item you selected in the project tree which could be a folder, a collection, or a smart collection. The records could be references, notes, tasks, charts, and categories depending on which kind of project you select. You can display records in a tree view or a table view. A convenient feature in the list panel is the Quick Add box. For the references module, you can type the author name, publication year, and a few words in the title to add a new reference. Biblioscape will search the Internet for the best match and add the bibliographic data automatically. For the notes module, it can be used for brainstorming.

The screenshot displays the Biblioscape 8 interface. At the top, there are three callout boxes: 'Quick Add' pointing to a plus icon, 'Tree view' pointing to a tree icon, and 'Table view' pointing to a table icon. Below these is a list of records with columns for Year, Authors, and Title. The record for 1990 by Marasco, C. J., Jr. is selected. To the right of the list are vertical panels for 'Search', 'Online Search', 'Categories', and 'Lookup'. Below the list is a metadata section with fields like 'Created', 'Modified', 'Ref Type', and 'ID'. The 'Publishing' section is expanded, showing fields like 'Date', 'Date Freeform', 'Publis...', 'Author Address', 'Langu...', and 'Extent of Work'. At the bottom, there are tabs for 'Live Preview', 'Read Only', 'Formatted', 'Links (2)', 'URL\*', 'PDF', 'RichText', and 'Related'.

Year	Authors	Title
1980	Kowal, D. M.	Natural causes of injuries in women r...
1997	Ander, P.; Marzullo, L.	Sugar oxidoreductases and veratryl alco...
1955	Korn, E. D.; Remy, C. N.; Was...	BIOSYNTHESIS OF THE PURINES VII. SY...
1954	Friedkin, M.; Roberts, D. W.	THE ENZYMATIC SYNTHESIS OF NUCLEO...
1989	Al-Juaid, S. S.; Eaborn, C.; El-...	Tris(trimethylsilyl)methyl and Tris(dimet...
1988	Krausslich, H. G.; Wimmer, E.	Viral proteinases
1993	Lesnikowski, Zbigniew J.; Schi...	Carboranyl oligonucleotides. 1. Synthesi...
1978	Matteson, D. S.; Biernbaum, ...	Synthesis of boron-substituted pyrimidin...
1986	De Clercq, E.; Walker, R. T.	Progress in Medicinal Chemistry
1990	Marasco, C. J., Jr.; Piantadosi,...	Synthesis and biological activity of novel ...
1987	Modest, E; Daniel, L. W.; Wykl...	New Avenues in Developmental Cancer ...
1985	Goodford, P. J.	A computational procedure for determini...
1987	Byberg, J. R.; Jorgensen, F. S....	Towards an identification of the pyrethroi...
1986	Paterson, A. R. P.; Case, C. E.	Transport of Nucleoside Drugs in Animal ...
1983	Belt, J. A.; Welch, A. D.	Transport of uridine and 6-azauridine in ...

Created: 5/20/2008 ChenPaul  
 Modified: 4/16/2009 Trial User  
 Ref Type: Journal Article  
 ID : Folder: 142 : Nucleosides synthesis

Reference Type: Journal Article  
 Authors: Marasco, C. J., Jr.; Piantadosi, C.; Meyer, K. L.; Morris-Natschke, S.; Is...  
 Title: Synthesis and biological activity of novel quaternary ammonium derivati...  
 Journal: J Med Chem  
 Y... | V... | I... | S... | E.. 1990 | 33 | 3 | 985 | 992  
 Memo  
 Keywords: Antineoplastic Agents/\*chemical synthesis/pharmacology;  
 Abstract: Alkylglycerols such as

**Publishing**

Date | ISSN |  
 Date Freeform: 1990 Mar |  
 Publis... | Place ... |  
 Author Address: University of North Carolina, School of Pharmacy, Division of Medicinal ...  
 Langu... | Country: eng |  
 Extent of Work

Live Preview | Read Only | Formatted | Links (2) | URL\* | PDF | RichText | Related

## Preview

The preview panel displays the details of the record you selected in the list panel. There are several tabs in the preview panel. You can display records in a Live Preview where you can edit the record directly. The Read Only tab will show the search words in yellow highlight. For the references module, if the full text is available, you can view the full text in the URL or PDF tab.

Year	Authors	Title
1987	BRUNGER, A. T.; KURIYAN, J.; KARPLU...	Crystallographic R Factor Refinement by Molecular ...
1976	Haile, J. M.	Molecular Dynamics Simulation: Elementary Methods
1988	Kosloff, R.	Time-dependent quantum-mechanical methods for ...
2008	Tetko, I. V.; Sushko, I.; Pandey, A. K....	Critical Assessment of QSAR Models of Environment...
2008	Zhu, H.; Tropsha, A.; Fourches, D.; Va...	Combinatorial QSAR Modeling of Chemical Toxicant...
2006	Kozikowski, A. P.; Roth, B.; Tropsha, A.	Why Academic Drug Discovery Makes Sense
2008	Baumann, K.; Rohrer, S. G.; Fechner, ...	Exploring benchmark dataset bias in ligand based vi...
2008	Bandyopadhyay, A.; Huan, J. L.; Liu, J....	Google Search Engine
2008	Bandyopadhyay, D.; Huan, J. L.; Liu, J....	Functional Neighbors: Inferring Relationships betwe...
2008	Karthikeyan, M.; Krishnan, S.; Pandey,...	Distributed Chemical Computing Using ChemStar: A...
2008	Wang, X. S.; Tang, H.; Golbraikh, A.; ...	Combinatorial QSAR Modeling of Specificity and Sub...
2008	Zhu, H.; Rusyn, I.; Richard, A.; Tropsh...	Use of Cell Viability Assay Data Improves the Predic...

Created: 2/5/2009 Trial User      Ref Type: Journal Article  
Modified: 2/5/2009 Trial User      ID : Folder: 435 : Online Search

1 / 19      72.3%      Find

766      *J. Chem. Inf. Model.* 2008, 48, 766–784

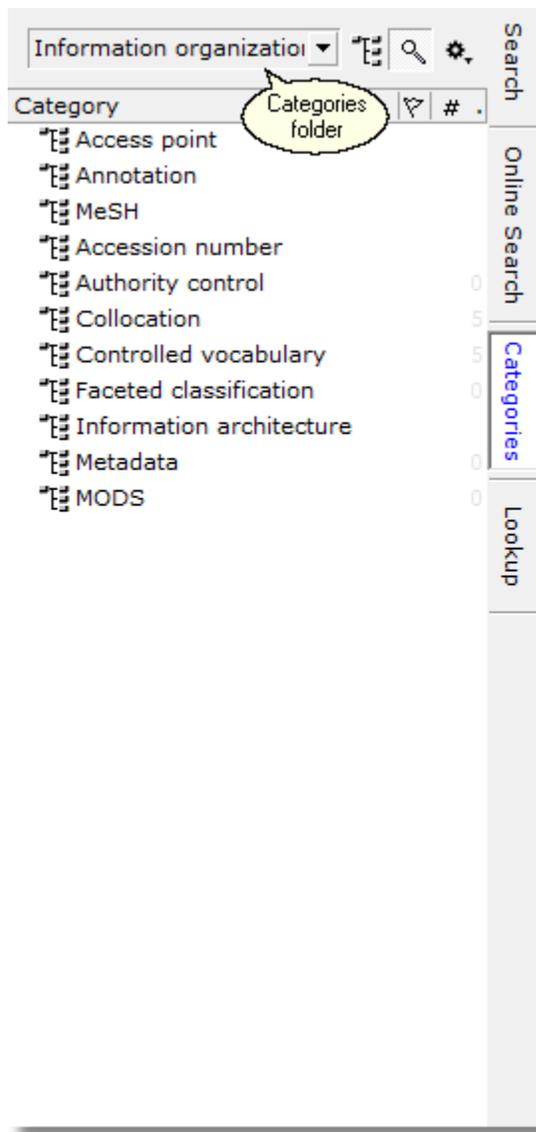
### Combinatorial QSAR Modeling of Chemical Toxicants Tested against *Tetrahymena pyriformis*

Hao Zhu,<sup>†</sup> Alexander Tropsha,<sup>\*†</sup> Denis Fourches,<sup>‡</sup> Alexandre Varnek,<sup>‡</sup> Ester Papa,<sup>§</sup> Paola Gramatica,<sup>§</sup> Tomas Öberg,<sup>||</sup> Phuong Dao,<sup>⊥</sup> Artem Cherkasov,<sup>⊥</sup> and Igor V. Tetko<sup>#,v</sup>

Laboratory for Molecular Modeling, Division of Medicinal Chemistry and Natural Products, and Carolina Exploratory Center for Cheminformatics Research, School of Pharmacy, CB 7360, University of North Carolina at Chapel Hill, Chapel Hill, NC 27599, Laboratories of Cheminformatics, Institute of Chemistry, Louis Pasteur University, Strasbourg, France, QSAR Research Unit in Environmental Chemistry and Ecotoxicology, Department of Structural and Functional Biology, University of Insubria, Varese, Italy, School of Pure and Applied Natural Sciences, University of Kalmar, SE-391 82 Kalmar, Sweden, Division of Infectious Diseases, Faculty of Medicine, University of British Columbia, 2733 Heather Street, Vancouver, British Columbia, V5Z 3J5, Canada, Helmholtz Center Munich—German Research Center for Environmental Health, Institute for Bioinformatics, Neuherberg, D-85764, Germany, and Institute of Bioorganic & Petrochemistry, Murmanskaya 1, Kyiv-94, 02660, Ukraine

Live Preview   Read Only   Formatted   Links   URL\*   PDF\*   RichText   Related

## Search



The search panel is on the right. It provides many ways to search records in your database. The result set will be displayed in the list panel. When searching against the current database, the hits will be displayed in the search panel with the search words highlighted in yellow. Besides searching records in the current database, the references module also let you search references on the Internet against Google Scholar and PubMed. The matching references will be directly added into the "Online Search" folder in your database. The "Online Search" also let you search against 2,000 plus university library catalogs, and commercial and public bibliographic databases all over the worlds.

The "Categories" tab is present in the search panel of the references, notes, tasks, and charts modules. You can drag and drop records from these modules into a category item in the search panel. This is a fast way to tag records with a category. Later, when you click on that category, all the records that are tagged with that category will be retrieved in the list panel. Categories can be organized in a tree structure. You can have several categories folders, therefore you can organize references, notes, etc. in many dimensions using categories.

## Status Bar

The status bar lists the number of records that are present in the list panel. When you click on a project item, the full path of that item in the project tree will be listed here.

Items: 161 | Folder: Folders > Hard Science > Xylanase homology

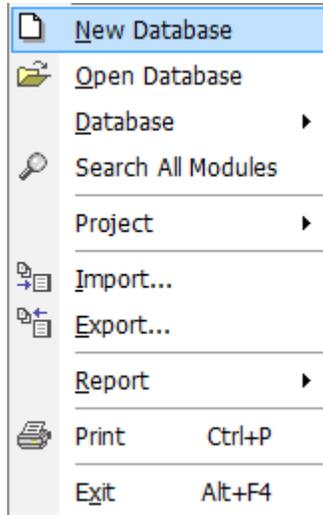


## 2.2 Creating a new database

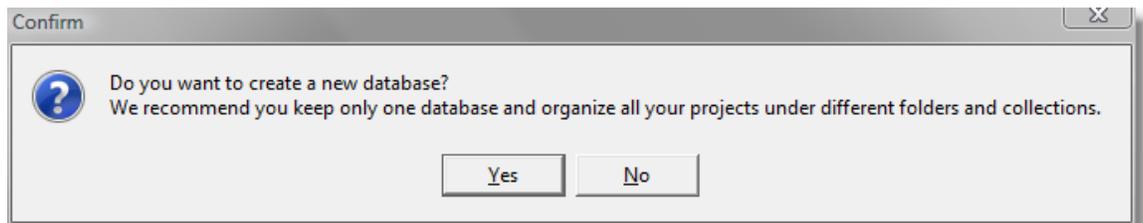
Each time Biblioscape starts, it will automatically load the last opened database. The first time you

run Biblioscape after installation, it will open a sample database. In this tutorial, we will create a new database.

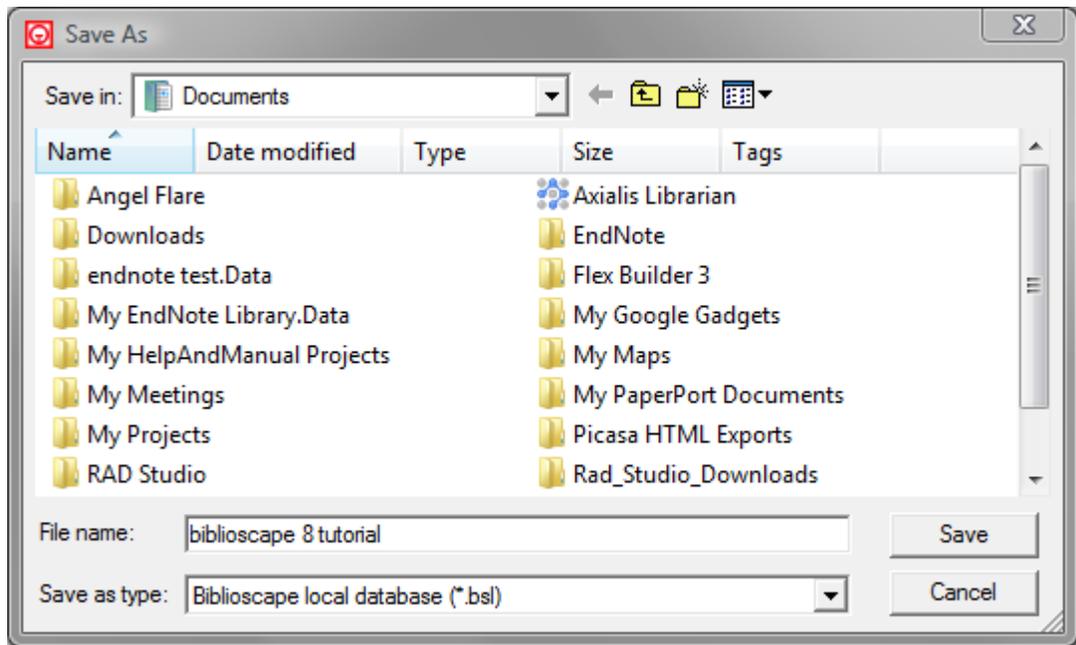
1. Start Biblioscape. Go to the menu command "File | New Database".



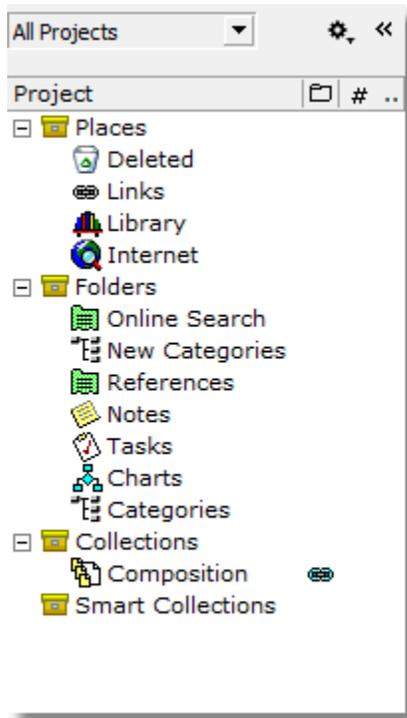
2. You will be prompted with the following Window. It reminds you to keep only one database and organize different projects with folders and collections. Having all your research related information in a single database has many advantages. You only need to backup one database and there is only one place to search. Biblioscape can handle a very large database with fast performance, so the size should not be a concern.



3. Click "Yes" to create a new database. You will be prompted with the "Save As..." window. Type your database name in the "File name" box. Biblioscape will create a folder using the name you entered, therefore, there is no need to create a database folder beforehand. Under this folder, there will be about 60 files created. Biblioscape will also create folders "Attachments" and "Backup" under the database folder. You can put all the attachment files under the Attachments folder, so relative path will be used in Biblioscape. When you move the database from one computer to another, the attachment path will not break.



4. Click the "Save" button. Biblioscape will create the database and open it. In the project panel, there will be 4 top level containers: Places, Folders, Collections, and Smart Collections.



## 2.3 Research writing project

There are many kinds of research writing projects. It could be as simple as a report you do in high school, a laboratory report with data that you gathered, a science research paper that you report in a scientific journal, a term paper you must complete in college, a thesis that you have to write before receiving your Ph.D., or a book, which is the ultimate form of research writing. In this tutorial, we will write a literature review which is in between a report and a science research paper. We will use it as an example to show you how Biblioscape can be used to help you with research writing.

### Choosing a topic

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Deciding what to write about is the first step. This is not a concern for a lab report or a scientific research paper. In those cases, you know you have to write about. For research writings in college, your professor often lets you choose from a list of topics or asks you to come up with a topic. Choosing the correct topic could be a challenge. First, you should eliminate topics that you have no interest in. Then, you need to do some preliminary research on the Web or in the library about the rest and decide on a topic that not only interests you, but also has enough reference material.

### Collecting references

---

Once you have chosen your topic, you need to research a bit more thoroughly. Search your library catalog and the Internet until you have a sense of what is available. Then, you can narrow your findings down from anything you can find to things that look as if they might be useful. One good reference can lead to several more useful references. Biblioscape makes finding related references easy. As you browse your reference collection, Biblioscape searches the Internet to find its full text. As more and more full text references become freely available on the Web, this could be a very useful feature.

### Taking Notes

---

Taking notes is the most intensive and time-consuming part of a research writing project. Reading source material and taking notes form the foundation of any academic writing project. Well-taken and organized notes become an integral part of your final draft. Biblioscape provides an integrated environment for reading source material and taking notes. Notes are automatically linked to the source material and can be conveniently organized with categories.

### Writing the paper

---

When it comes to the final stage of writing, you can do it in a word processor or in Biblioscape. Biblioscape works with both Microsoft Word and WordPerfect. You can shoot your notes to Word, and you can also shoot selected references to Word as temporary citations. Once finished, save your manuscript as a RTF file. Biblioscape can format the manuscript by converting the temporary

citations to formatted citations and generating a bibliography. For a major writing project like a thesis or a book, the Bibioscape Composition module allows you to build an outline from existing notes, create an index, a suggested reading list, a glossary, and generate formatted citations and a bibliography.

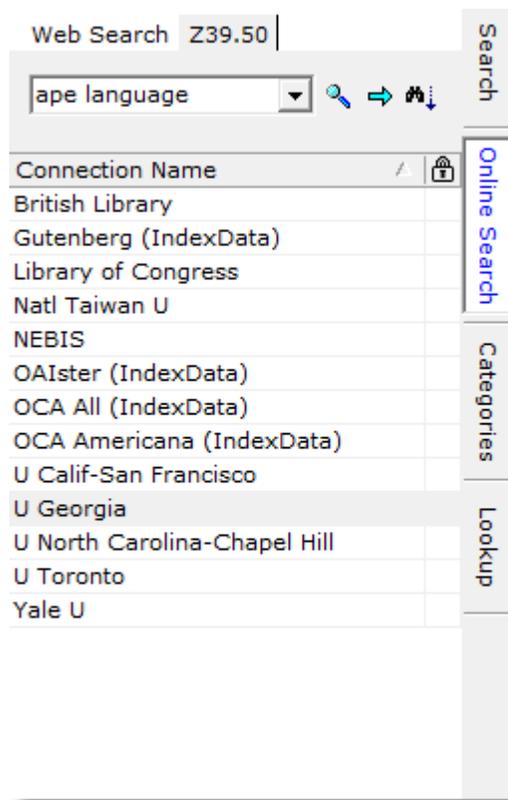
## 2.4 Collecting references

In this writing project example, our topic is "Apes and Language". It is a sample paper from the book "Rules for Writers" by Diana Hacker (Boston: Bedford/St. Martin's 2004). After receiving a topic, the first thing to do is to search your university library catalog. If you can find a good book or review article about your topic, you can quickly see what research has been done in the area. Then you can go into detail by searching for research articles about what you will write. There are many citation databases available on the Web. Your university subscribes to many citation databases from commercial providers. There are also quality citation databases freely available on the Web like Google Scholar and PubMed.

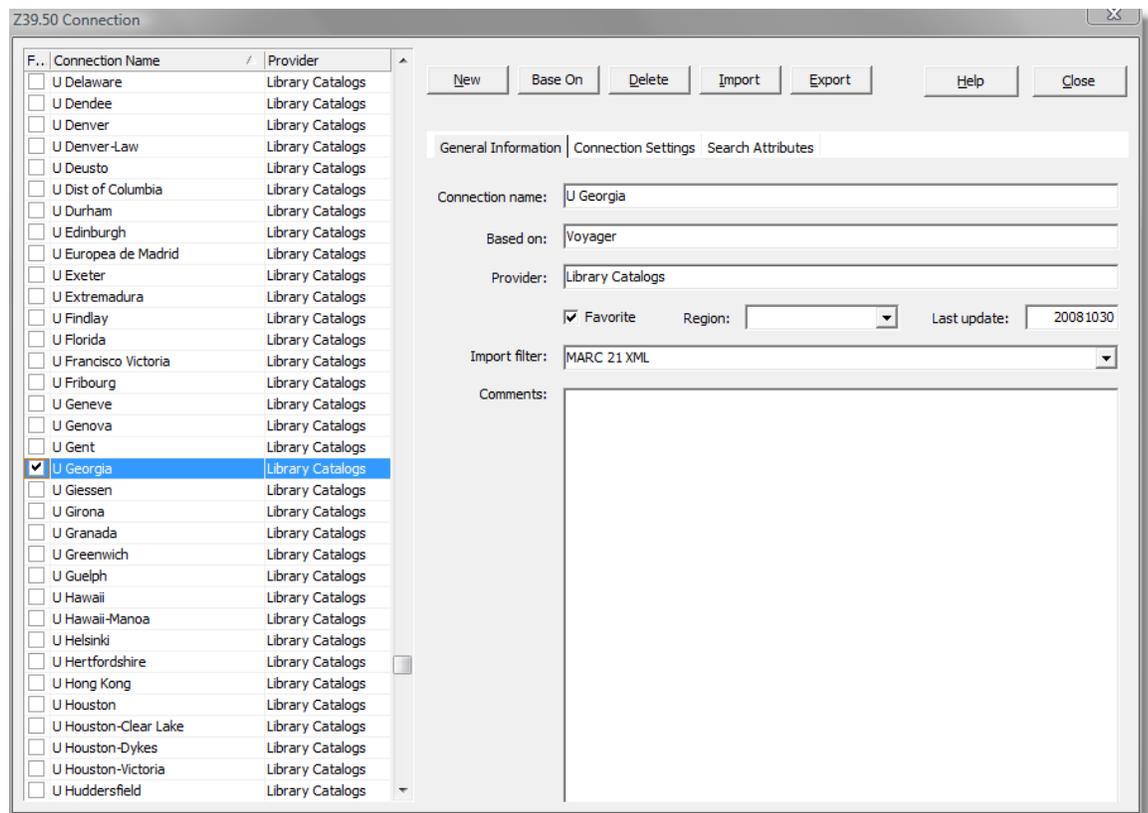
### [Search your university library catalog](#)

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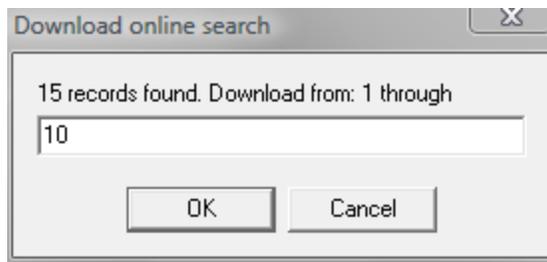
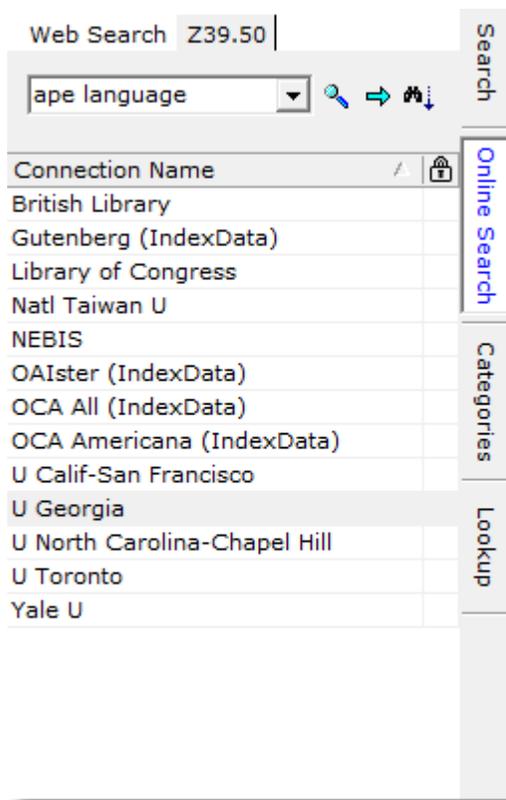
1. After creating a new database in the last tutorial, it will be automatically opened the next time you start Bibioscape. There are 4 top level items created in the project tree. Open "Folder" and click the "References" folder.
2. On the search panel, click the "Online Search" tab on the right.



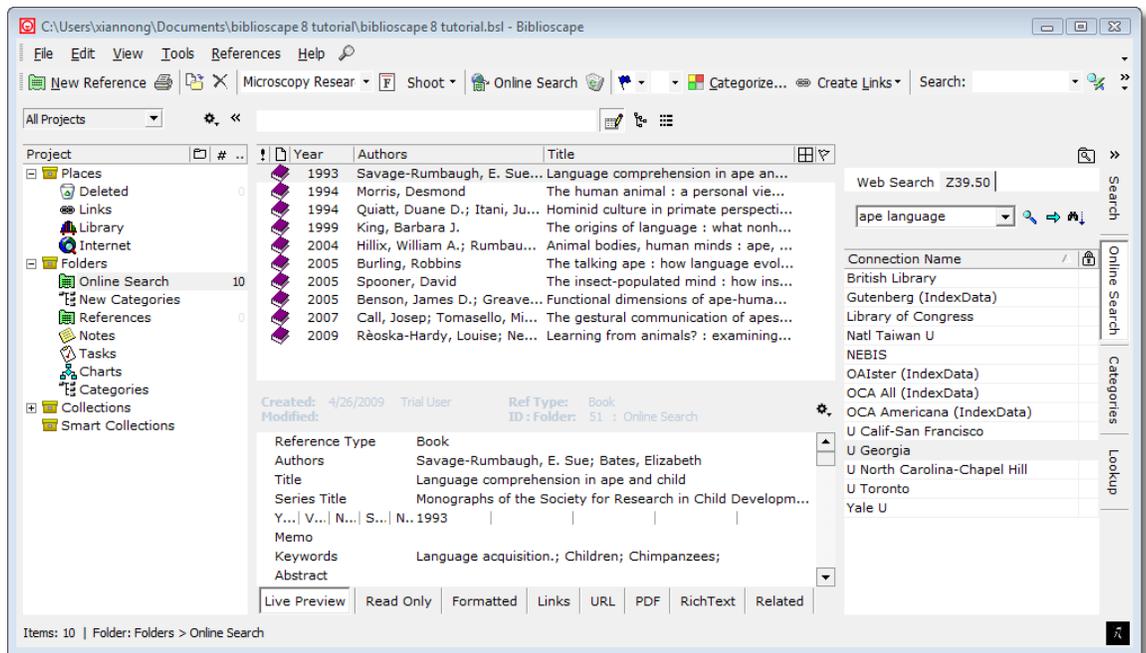
3. Click on the "Z39.50" tab at the top. There are only a few favorite Z39.50 sources listed. If your university is not listed, double click on any Z39.50 source. There are 2,000 plus pre-defined Z39.50 sources. If you want a source to be listed in the "Online Search" tab, check the "Favorite" box and click the "Close" button.



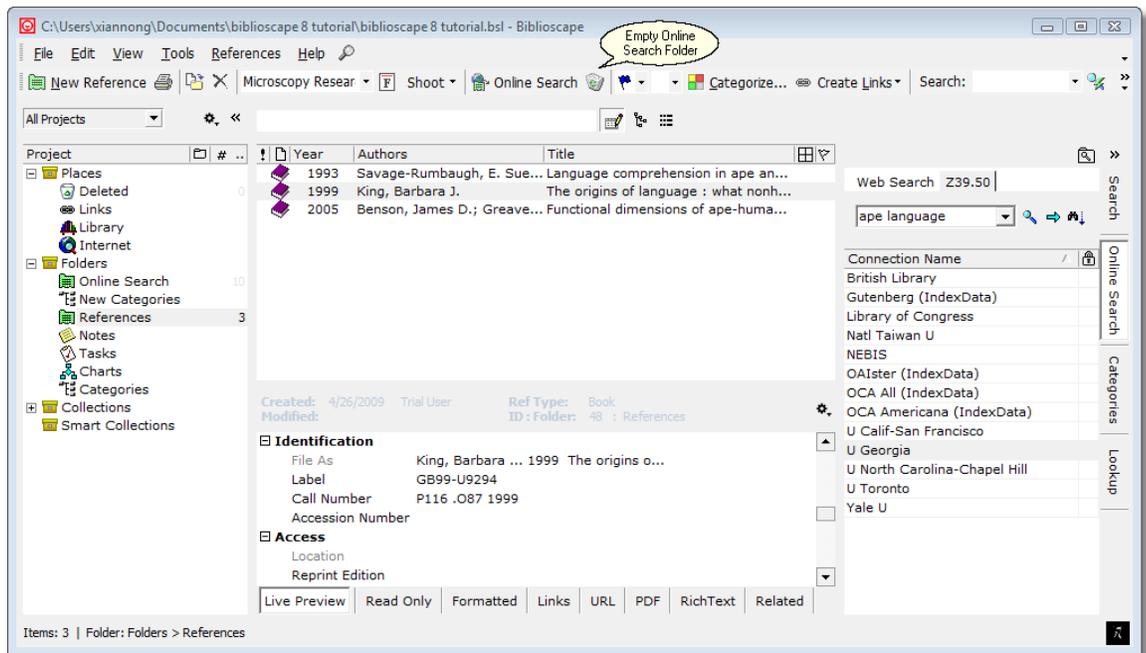
4. In this tutorial, let's search the University of Georgia library catalog as an example. Under the "Z39.50" tab, select the source "U Georgia" and enter "ape language" as the search string. After pressing the Enter key, Biblioscape will send the search string to the University of Georgia library catalog server and return the total number of hits. There are a total of 15 records found. By default, Biblioscape will retrieve 10 records per batch after you click the OK button.



5. All 10 hits will be automatically imported into the "Online Search" folder which is a temporary place for your hits. You need to go through each hit and drag and drop the ones you want to keep into the "References" folder.



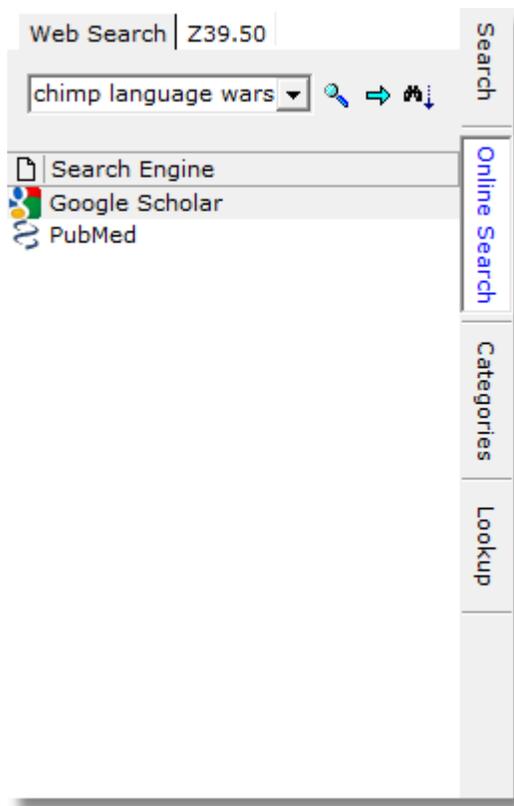
6. Clicking the "References" folder will retrieve the hits you want to keep. In the preview panel, you can find a book's call number by scrolling down. Now you can go to the library and find the book by the call number. If you have run lots of online searches, you may have a large number of unwanted records in the "Online Search" folder. You can click the "Empty Online Search Folder" button to clean up the folder periodically.



## Search Google Scholar

After reading the books checked out from your university library, you may start to develop some ideas about what types of research should be included in your review article "Apes and Language". For example, if you became interested in the sub-topic "chimp language wars" and want to find out some of the research papers about this topic, you can run another type of Biblioscape Online Search against Google Scholar.

1. If you are not in the References module, click a references folder. In the search panel on the right, click "Online Search". Click the "Web Search" tab at the top.
2. Select "Google Scholar". Enter the search string "chimp language wars" and press the Enter key.



3. Biblioscape will send the search to Google Scholar and automatically import the first 10 hits into the "Online Search" folder. As with Z39.50 search hits, you need to go through each hit and drag and drop the ones you want to keep into a references folder.
4. Another useful feature in Biblioscape is to find related references. For example, after the searching Google Scholar for "chimp language wars", you find the first hit "Gibbons, A. 1991" to be a valuable source. You can then click the "Related" tab in the preview panel. Biblioscape will display top 10 most relevant references to the "Gibbons, A. 1991" paper.

You can go through the list. If you find another interesting paper in the list, click on the hyperlink text "Import into BibTeX". Biblioscope will automatically import the reference into the current references folder.

The screenshot shows the Biblioscope interface. At the top, there is a table of references with columns for Year, Authors, and Title. Below the table, there are fields for 'Created', 'Modified', 'Ref Type', and 'ID'. The main preview panel displays the title 'Primate language and cognition: Common ground' and the author 'D Rumbaugh - Social Research, 1995 - questia.com'. A callout bubble points to the 'Import into BibTeX' link with the text 'Click the hyperlink to capture a new reference'. At the bottom, there is a navigation bar with tabs for 'Live Preview', 'Read Only', 'Formatted', 'Links', 'URL\*', 'PDF', 'RichText', and 'Related', with the 'Related' tab highlighted by a red box.

Year	Authors	Title
1991	Gibbons, A.	D{\e}{\`a} vu all over again: Chimp-la...
1990	Somit, A.	Humans, Chimps, and Bonobos: The Biolo...
2003	McGrew, W. C.	Ten dispatches from the chimpanzee cultu...
1997	Fouts, R.	Next of kin: What chimpanzees have taug...
1991	Gardner, B. T.; Gardner, B. T.	Chimp-Language Wars
1994	Blum, D.	The monkey wars
2005	Petitto, L. A.	How the brain begets language
1965	Pei, M.	The story of language

Created: 4/27/2009 Trial User      Ref Type: Journal Article  
 Modified: 4/27/2009 Trial User      ID : Folder: 62 : Online Search

[Primate language and cognition: Common ground](#)  
 D Rumbaugh - Social Research, 1995 - questia.com  
 Research and preparation of this paper was supported by grant HD-06610 from the National Institute of Child Health and Human Development, the National Aeronautics and Space Administration, and by  
[Cited by 13](#) - [Related articles](#) - [Web Search](#) - [Import into BibTeX](#) - [All 3 versions](#)

[CITATION] Next of kin: What chimpanzees taught me about who we are

Live Preview | Read Only | Formatted | Links | URL\* | PDF | RichText | **Related**

- Now you have found some interesting papers. It is time to go to the library and make photo copy of those papers. In recent years, the full text of recently published scientific papers have become freely available, especially in the life science fields. Google has also made part of the full text of many published books freely available. When you browse to a new reference, Biblioscope will search the Internet for freely available full text. If it cannot find the full text, it will list the source of the full text and the price in case you cannot find a specific journal in your library. If you see a "\*" sign next to the URL or PDF labels in the preview panel, you can click on that tab. You will find the full text or instructions about how to get the full text electronically.

Year	Authors	Title
1997	Fouts, R.	Next of kin: What chimpanzees have taught me about who ...
1991	Gardner, B. T.; Gardner, B. T.	Chimp-Language Wars
1994	Blum, D.	The monkey wars
2005	Petitto, L. A.	How the brain begets language
1965	Pei, M.	The story of language
1980	Wade, N.	Does man alone have language? Apes reply in riddles, and ...
	Costs, O.	about lackoffunds or ask for more money. With the proper ...
1994	Morris, Desmond	The human animal : a personal view of the human species

Created: 4/27/2009 Trial User Ref Type: Journal Article  
 Modified: 4/27/2009 Trial User ID: Folder: 56 : Online Search

Google Book Search  Search Books [My library](#) | [Sign in](#)

About this book Preview this book **The Cambridge companion to Chomsky** By James Alasdair

Page 162 Search in this book Go

162 *Norbert Hornstein*

There may well be many . . . questions that are not subject to empirical inquiry in the manner of the sciences . . . if humans are themselves part of the natural world, and thus have specific biological capacities with their scope and limits, like every other organism. (Chomsky 2000a: 73)

This idea resonates with the Cartesian view outlined above. Recall that the crucial intuition behind the Cartesian view is that knowledge is a fortuitous accident. We can gain significant knowledge only if our minds are built for truth in one or another domain. Only then is deep insight possible. However, if the overlap between mind and the world is accidental, then there is no reason to believe that it will be generally applicable to any question that might interest us or even be of importance to us. Limits to knowledge are inherent given this picture of things.

The successful natural sciences . . . fall within the intersection of SFF and the nature of the world; they treat the (scattered and limited) aspects of the world that we can grasp and comprehend by naturalistic inquiry, in principle. The intersection is a chance product of

**Chomsky** Noam Chomsky is one of the most influential thinkers of modern times. The most cited writer in the humanities,.... [more >](#)

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[Table of Contents](#)

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[Barnes&Noble.com](#)

Live Preview Read Only Formatted Links URL\* PDF RichText Related

### Enter a reference by Quick Add

Sometimes, you already know that a reference is valuable and you just want to add it to your Biblioscape database. You can add a reference with minimum typing using Quick Add. For example, from reading another source, you know that Terrace H. S. published an important paper in 1979 about ape language. The following steps will show you how to add this reference using Quick Add.

1. Click a references folder.
2. Click the button "Quick Add" to make the Quick Add box visible. Type "terrace 1979 ape" and press the Enter key.

terrace 1979 ape   

3. Biblioscape will search the Internet and automatically import the best match into the current folder.

Year	Authors	Title
1979	Terrace, H. S.; Petitto, L. A...	Can an ape create a sentence?
1981	Patterson, F.; Linden, E.	The education of Koko
1995	Rumbaugh, D.	Primate language and cognition: Com...
1993	Savage-Rumbaugh, E. Sue; ...	Language comprehension in ape and c...
1999	King, Barbara J.	The origins of language : what nonhu...
2005	Benson, James D.; Greaves...	Functional dimensions of ape-human d...

Created: 4/27/2009 Trial User      Ref Type: Journal Article  
 Modified: 4/27/2009 Trial User      ID : Folder: 74 : References

Reference Type: Journal Article  
 Authors: Terrace, H. S.; Petitto, L. A.; Sanders, R. J.; Bever, T. G.  
 Title: Can an ape create a sentence?  
 Journal: Science  
 Y... | V... | I... | S... | E.. 1979 | 206 | 4421 | 891 | 902  
 Memo  
 Keywords  
 Abstract

**Publishing**  
 Date | ISSN

Live Preview | Read Only | Formatted | Links (1) | URL\* | PDF\* | RichText | Related

4. You may have noticed that there is an "\*" sign after "PDF" in the preview panel. It means Bibloscape has found the full text of this paper. You can click on the "PDF\*" tab to read the full text.

Year	Authors	Title
1979	Terrace, H. S.; Petitto, L. A.; Sander...	Can an ape create a sentence?
1981	Patterson, F.; Linden, E.	The education of Koko
1995	Rumbaugh, D.	Primate language and cognition: Common ground
1993	Savage-Rumbaugh, E. Sue; Bates, E...	Language comprehension in ape and child
1999	King, Barbara J.	The origins of language : what nonhuman primat...
2005	Benson, James D.; Greaves, William...	Functional dimensions of ape-human discourse

Created: 4/27/2009 Trial User      Ref Type: Journal Article  
 Modified: 4/27/2009 Trial User      ID : Folder: 74 : References

2 / 13      60.5%      Find

## Can an Ape Create a Sentence?

H. S. Terrace, L. A. Petitto, R. J. Sanders, T. G. Bever

The innovative studies of the Gardners (1-3) and Premack (4-6) show that a chimpanzee (*Pan troglodytes*) can learn substantial vocabularies of "words" of visual languages. The Gardners taught

song when asserting territory. Such rigidity is typical of the communicative behavior of other genera, for example, bees communicating about the location and quality of food or sticklebacks opening

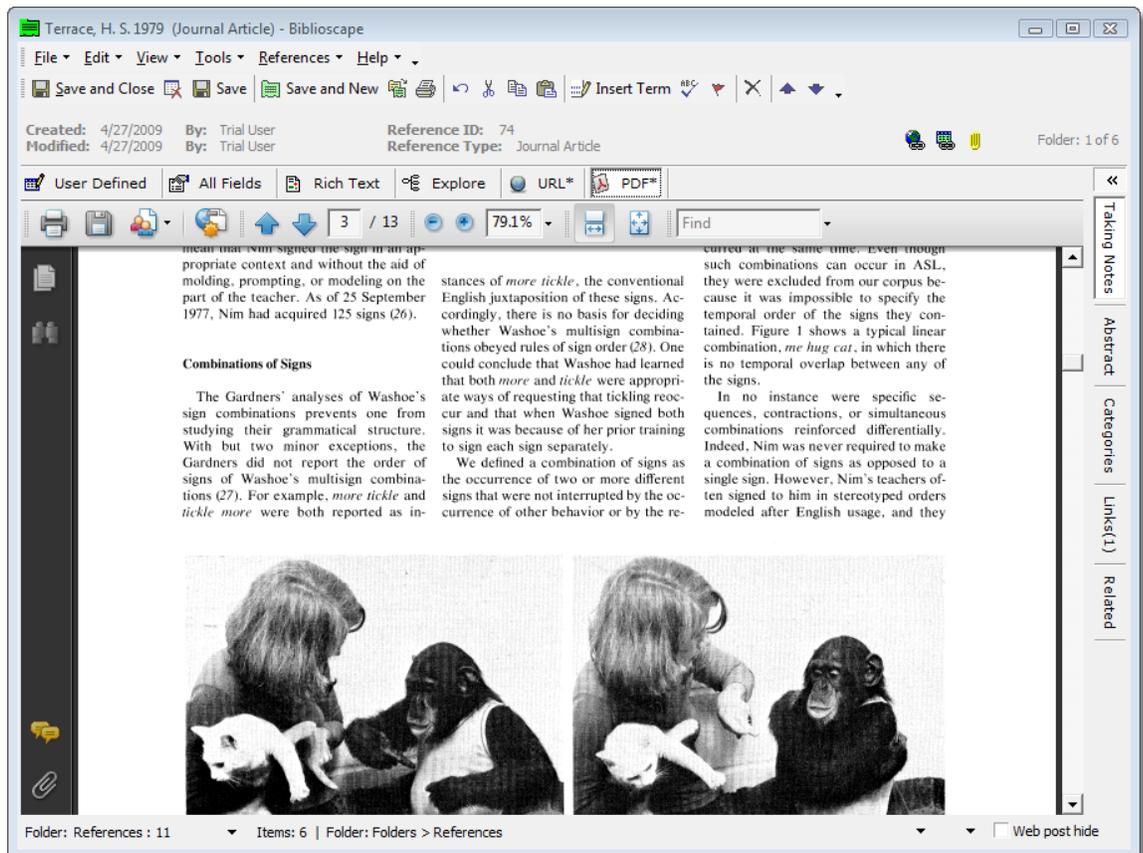
quences produced and understood by their pongid subjects were governed by grammatical rules. The Gardners, for example, note that "The most significant results of Project Washoe were those based on comparisons between Washoe and children, as . . . in the use of order in early sentences" (3, p. 73).  
 If an ape can truly create a sentence there would be a reason for asserting, as Patterson (11) has, that "language is no longer the exclusive domain of man." The purpose of this article is to evaluate that assertion. We do so by summarizing the main features of a large body of data that we have collected from a chimpanzee exposed to sign language during

Live Preview | Read Only | Formatted | Links (1) | URL\* | PDF\* | RichText | Related

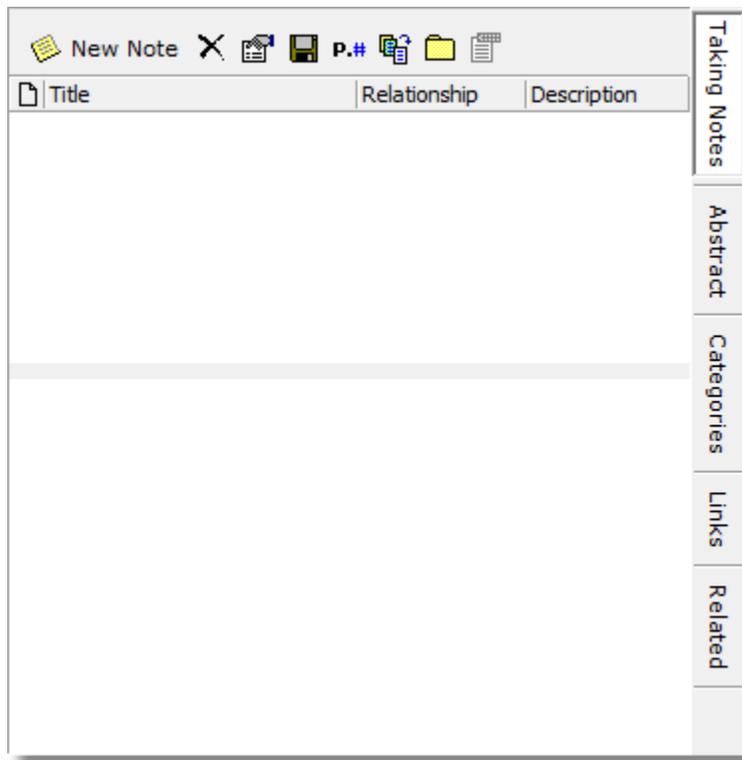
## 2.5 Taking notes

Now that you have accumulated a lot of good source material, it is time to find a comfortable place and start to read. While reading a book or a paper, you will have many ideas about the source. You may want to quote a source to support your thesis, you may find one source to be contradictory to the conclusion from another source, or you may simply have a comment about a source. Taking notes is the most important part of academic writing. You need to document original ideas from quotes to prevent plagiarism.

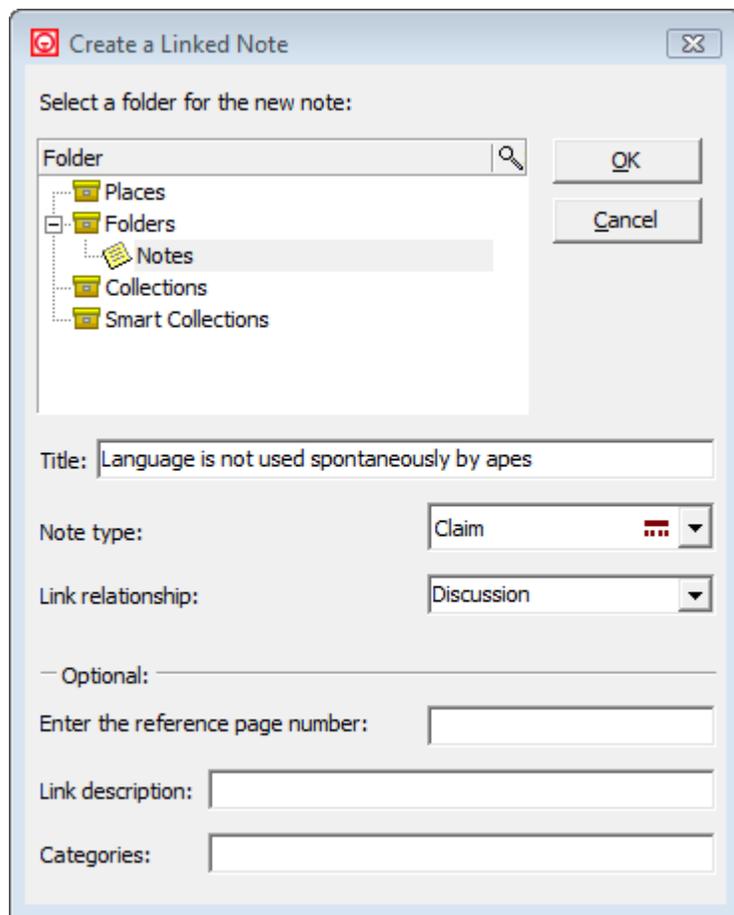
1. If the full text of a reference is available as a Web page or a PDF file, you can view the full text inside Biblioscape. In the case of the reference "Terrace, H. S. 1979" that we added in the last step, Biblioscape found that the full text is freely available as a PDF on the Web. If you double click that reference to open it, you can see the tab "PDF" is changed to "PDF\*" to indicate a PDF file is available. You can click on the "PDF\*" tab to view the full text.



2. When reading a source material, you can add notes to be associated with the source inside the reference editor. First, click on the "Taking Notes" tab on the right. Click the "New Note" button at the top.



3. In this example, let's add a note about the conclusion from this paper. First, select the notes folder where you want the new note to be added. Then, add "Language is not used spontaneously by apes" as the title, and select "Claim" as the "Note type". Click the OK

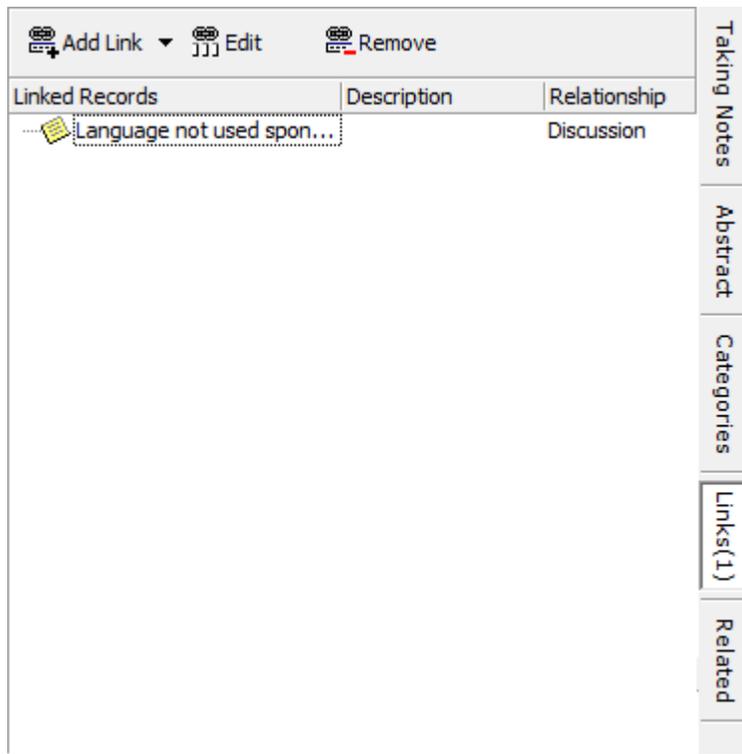


button to add the note.

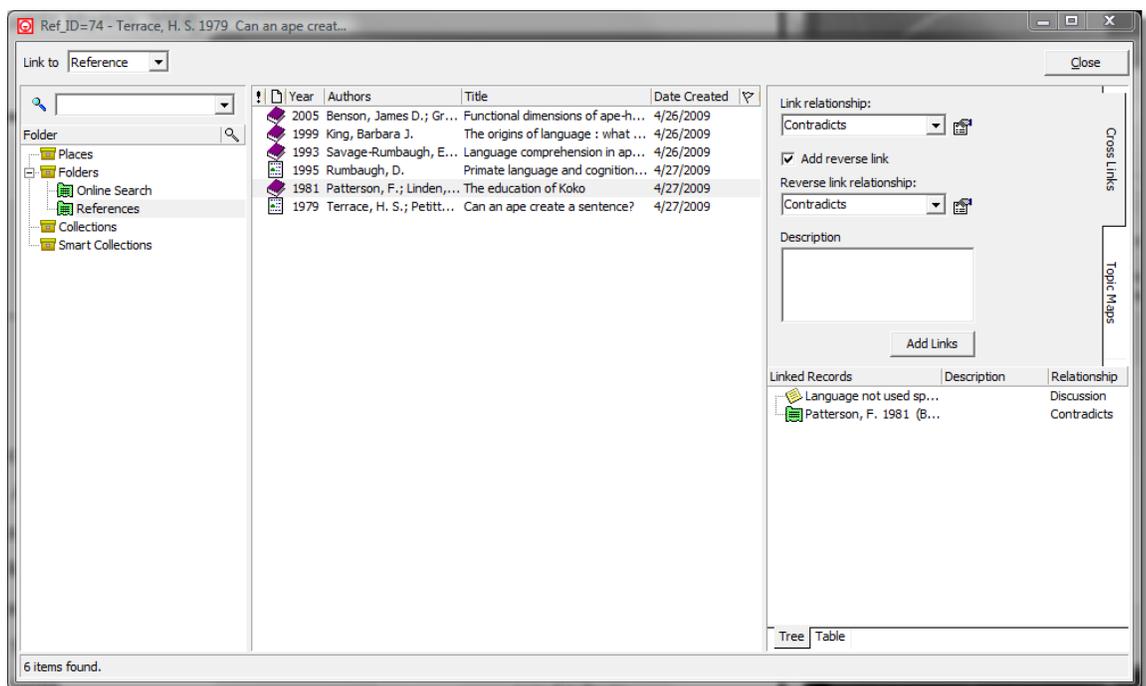
4. A new note will be added to the "Taking Notes" panel. The reference "Terrace, H. S. 1979" will be inserted as a temporary citation in the new note's content box. A link is also automatically created between the new note and the reference "Terrace, H. S. 1979". You can now type the content of the new note. Let's type the conclusion from the paper "Terrace, H. S. 1979": apes in language experiments were not using language spontaneously but were merely imitating their trainers, responding to conscious or unconscious cues. [Terrace, 1979 #74]

The screenshot shows the Bibloscape 8 interface for a journal article titled "Terrace, H. S. 1979 (Journal Article) - Bibloscape". The article's reference ID is 74. The main content area displays two graphs. The left graph, titled "Fig. 2 (left)", plots "Mean length of utterance" (y-axis, 1.2 to 4.4) against "Age (months)" (x-axis, 20 to 52). It compares three deaf children (Eve, Sarah, Pola) and Nim. The right graph plots "Relative frequency of semantic relationships" (y-axis, 0.00 to 0.14) against "Semant" (x-axis, listing relationships like Agent + action, etc.). A note on the right side of the interface reads: "apes in language experiments were not using language spontaneously but were merely imitating their trainers, responding to conscious or unconscious cues. [Terrace, 1979 #74]".

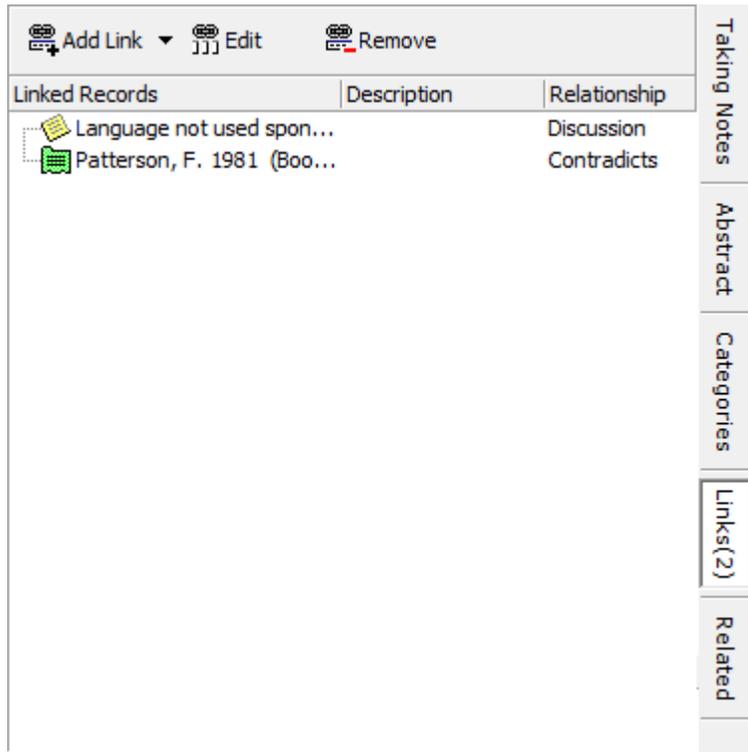
- Now we have added a note. While reading the paper, you will find that its conclusion contradicts the conclusion from another paper "Patterson, F. & Linden, E. 1981". The Patterson paper reports that apes have used sign languages to each other spontaneously. We can add a link between these two references and assign "Contradicts" as its link relationship. Go to the "Links" tab and click the "Add Link" button and select "Link to Reference...".



6. Select the "References" folder on the left. In the middle panel, select the reference "Patterson, F. & Linden, E. 1981" as the reference to link to. On the right panel, select "Contradicts" as the "Link relationship" between "Terrace, H. S. 1979" and "Patterson, F. & Linden, E. 1981". Click the "Add Links" button, and click the "Close" button.



7. The new link will be shown on the "Links" tab.



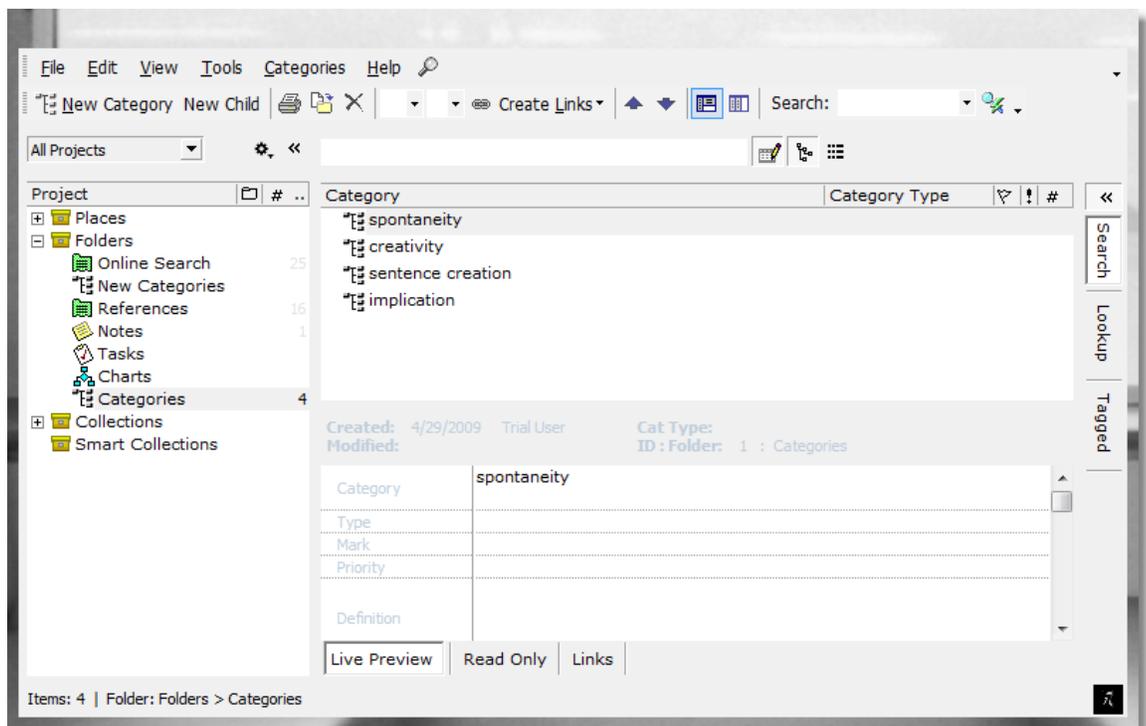
## 2.6 Organizing with categories

When working on a big academic writing project, you may have hundreds or even thousands of references and notes. When the number of records grow over a certain point, you need to organize your collection for easy retrieval. Biblioscape includes an easy to use tagging tool for both references and notes. In this example project "Apes and Language", we will organize references and notes by 4 categories: "spontaneity", "creativity", "sentence creation", and "implication". These are the 4 sections of the sample paper. For a big project, you will have many more categories. You can also organize categories in a tree structure.

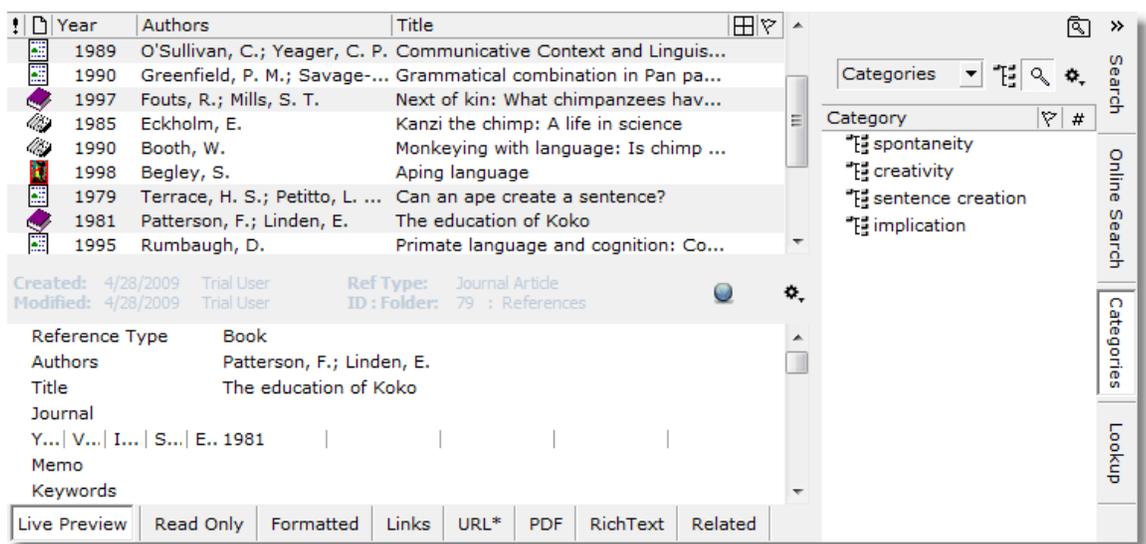
1. Click the "Categories" folder in the project panel.
2. In the categories module, click the "Quick Add" button. In the Quick Add box, enter "spontaneity" and press the Enter key. The new category will be added to the categories folder. Type the other 3 categories followed by the Enter key.



3. All 4 categories are now added to the categories folder. You can use them to tag your references and notes.



4. Now, let's go to the "References" folder. In the search panel on the right, click the "Categories" tab. At the top, select the "Categories" folder to open it. All 4 category items we added to that folder will be listed.
5. Next, we will tag some references using the categories we added. Select the references that are about apes using language spontaneously, and drag and drop these references into the category "spontaneity" in the categories tab. Bibloscape will tag those selected references with the category "spontaneity".



- Click on the category "spontaneity" in the categories tab. Bibioscape will automatically retrieve all those references that are tagged by the category "spontaneity".

The screenshot shows the Bibioscape interface. At the top, there is a table of references with columns for Year, Authors, and Title. Below this, there is a detailed view of a selected reference, including its Reference Type, Authors, Title, Journal, and Keywords. On the right side, there is a 'Categories' panel with a search bar and a list of categories, including 'spontaneity', 'creativity', 'sentence creation', and 'implication'. The 'spontaneity' category is highlighted, and the number '5' is shown next to it, indicating the number of references associated with that category.

Year	Authors	Title
2000	Lyn, H.; Savage-Rumbaugh...	Observational word learning in two b...
1989	O'Sullivan, C.; Yeager, C. P.	Communicative Context and Linguisti...
1997	Fouts, R.; Mills, S. T.	Next of kin: What chimpanzees have ...
1979	Terrace, H. S.; Petitto, L. A....	Can an ape create a sentence?
1981	Patterson, F.; Linden, E.	The education of Koko

Created: 4/28/2009 Trial User Ref Type: Journal Article  
 Modified: 4/29/2009 Trial User ID: Folder: 84 : References

Reference Type: Journal Article  
 Authors: Lyn, H.; Savage-Rumbaugh, E. S.  
 Title: Observational word learning in two bonobos (Pan paniscus): O...  
 Journal: Language and Communication  
 Y... | V... | I... | S... | E.. 2000 | 20 | 3 | 255 | 273  
 Memo  
 Keywords

Live Preview | Read Only | Formatted | Links | URL\* | PDF\* | RichText | Related

Categories: spontaneity (5), creativity, sentence creation, implication

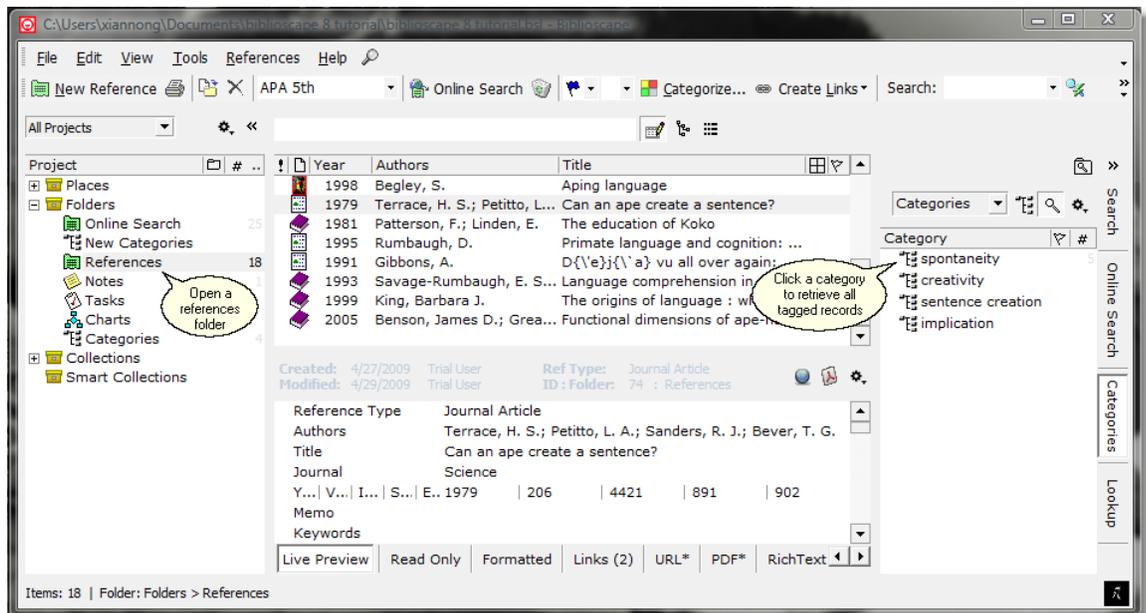
- You can organize notes by categories in the same way.

## 2.7 Writing a paper

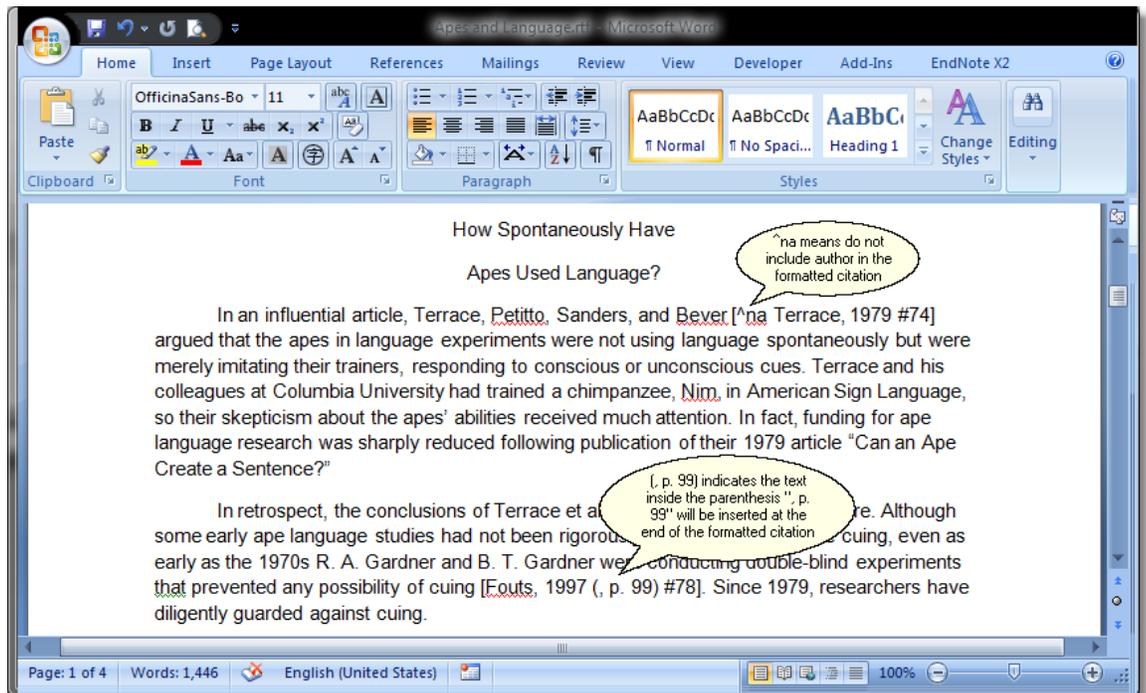
In the previous tutorials, we have collected enough references about the topic and taken many notes while reading the source materials. We have also shown how to organize references and notes with categories for easy retrieval. Now, it is time to do the actual writing. If you have done the note taking part right, writing a first draft should not be hard. For a small project like a research paper, most people prefer to do it in a word processor. In this tutorial, we will show you how to cite references, insert notes, and format your manuscript to generate the formatted citations and a bibliography.

### [Insert temporary citations](#)

- Let's use Microsoft Word as an example. When you write in Word and need to cite a reference, switch to Bibioscape. Open the references folder to find the reference you want to cite. If you have many records under a folder, it may be hard to find the reference you want. If you have tagged references with categories, you can click on the category item on the right to locate the reference you want to cite.



- To cite the reference, you can press Ctrl+Shift+T to shoot the reference as a temporary citation into Word. Or, you can press Ctrl+C or Ctrl+T to copy the temporary citation onto the Clipboard, go to Word, and paste the temporary citation by pressing Ctrl+V.



- A temporary citation can be modified in several ways. For example, if you have already mentioned authors in the main text, there will be no need to include authors again in the formatted citation, you can put ^na inside the temporary citation to tell Biblioscape not to include authors in the formatted citation during formatting.

### Insert notes

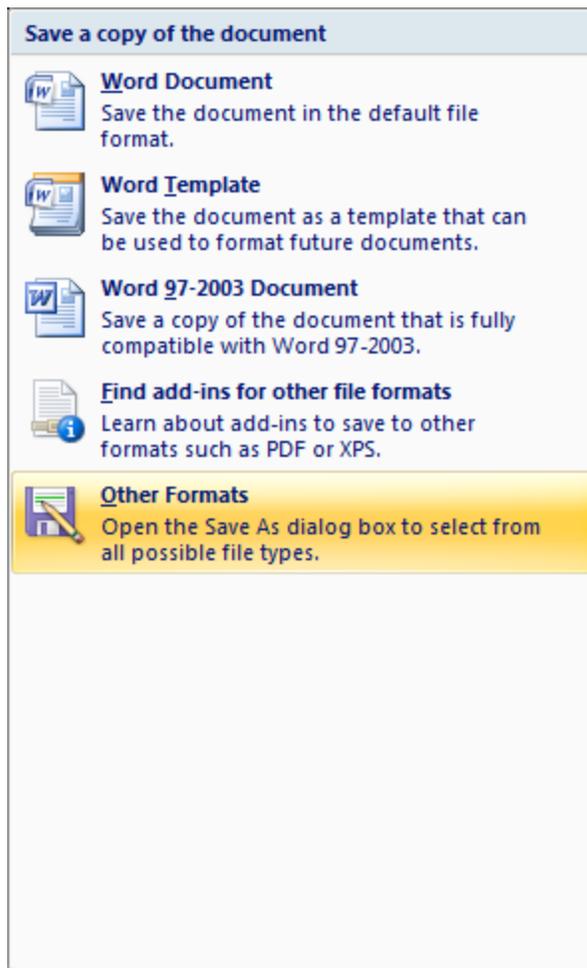
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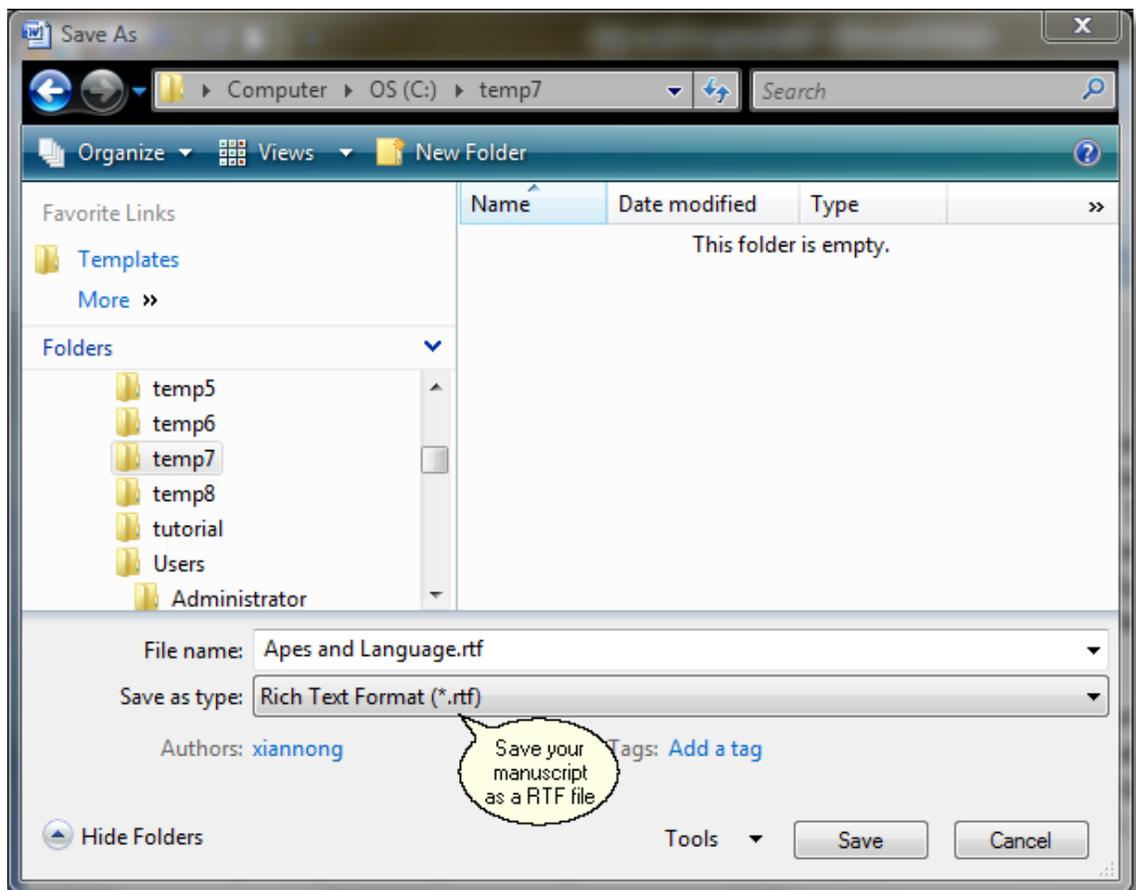
Besides references, you can also insert notes into your word processor. If you have Word or WordPerfect, you can go to a notes folder. Select the note you want to insert and press the Ctrl+S key to shoot the note into Word or WordPerfect. If the note is linked to a reference, Biblioscope will include the linked reference as a temporary citation at the end of the inserted note.

### Format manuscript

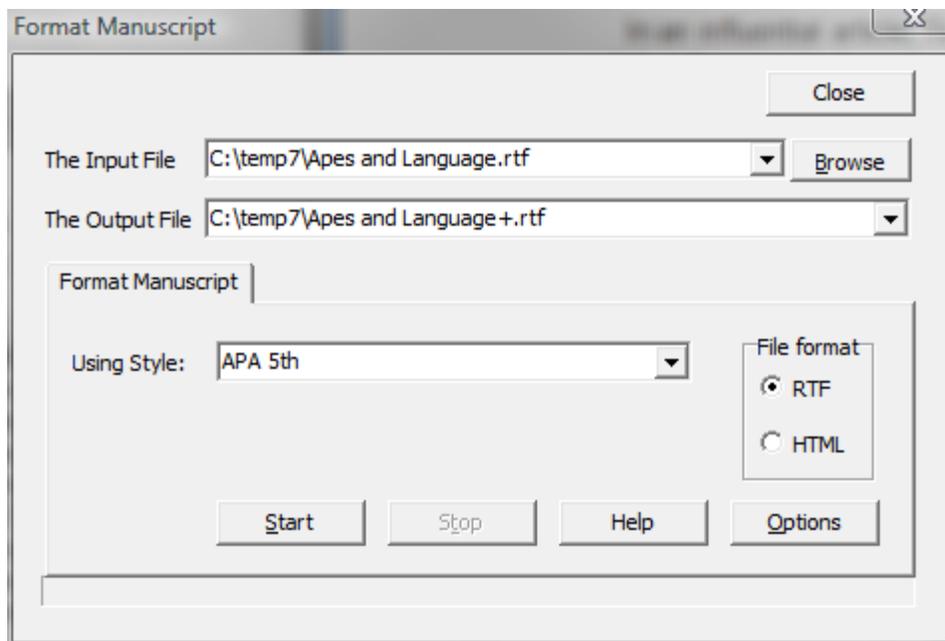
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1. Once you are finished writing, save your manuscript as a RTF file.

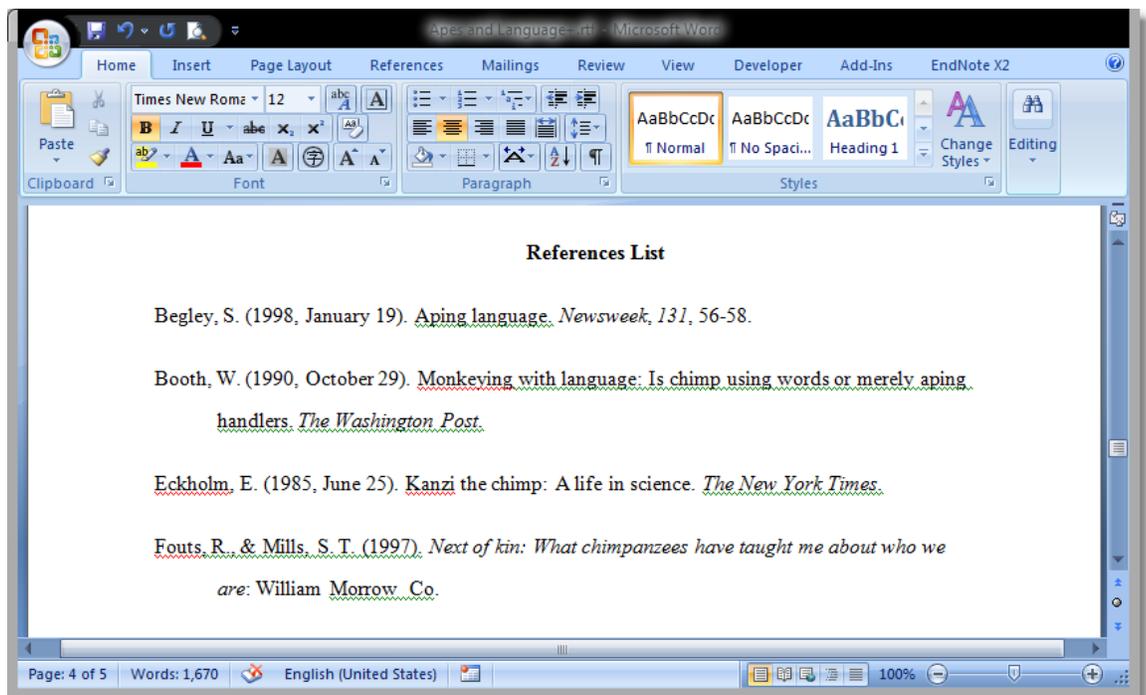
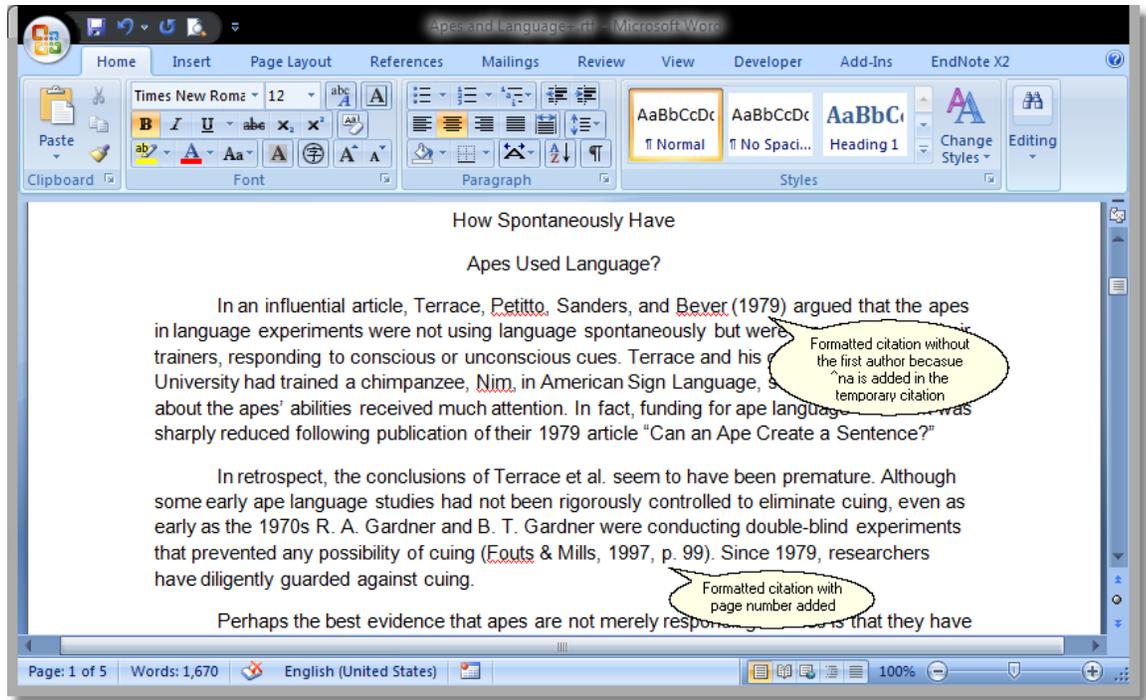




2. In Bibloscape, go to "Tools | Format Manuscript". Select the file you saved in the last step. Select "APA 5th" as the style to use. Click the "Start" button to format the manuscript.



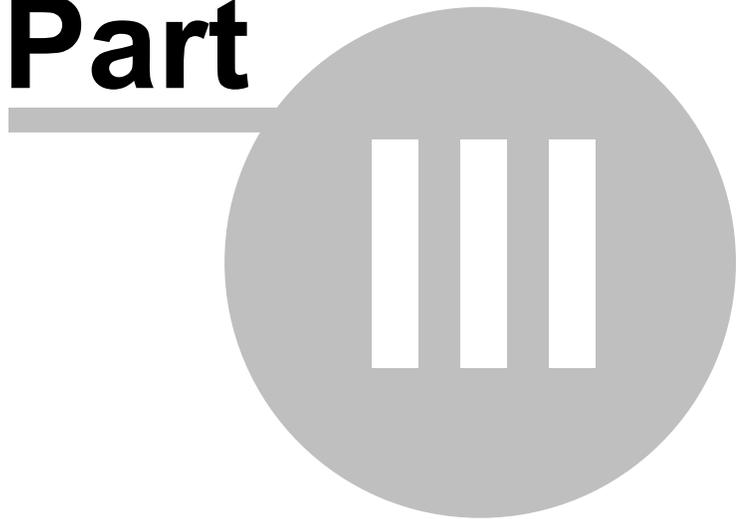
- Once finished formatting, click the "Yes" button to open the formatted manuscript. Biblioscape will convert the temporary citations into formatted citations and generate a bibliography at the end of the manuscript.



# Managing folders and collections

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part

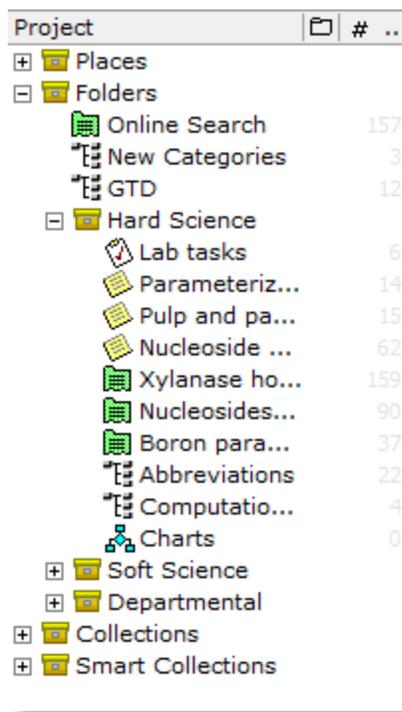


### 3 Managing folders and collections

All Biblioscape records from different modules are managed in the project tree. Under the project tree, there are 4 top level branches: Places, Folders, Collections, and Smart Collections. Under the "Places" branch, there is: "Deleted" to access all the deleted records; "Links" to see all the links between Biblioscape records; "Library" to access the library module; and "Internet" to open a Web browser inside Biblioscape. Under the "Folders" branch, you can access all the records. Any reference, note, task, chart, and category record has to be inside a folder. Under the "Collections" branch, you can open a collection of references, notes, tasks, charts, and categories. Under the "Smart Collections" branch, you can store any queries. Once you run a search, you can save it under the "Smart Collections" so that you don't have to redefine it later.

Biblioscape has many features that are common in all modules. For example, how records are displayed in the preview pane, fast search and advanced search, etc. We will go through all these features related to organizing records in the project tree.

#### 3.1 About Biblioscape folders



Folders are the most basic organizing structure in Biblioscape. A folder in Biblioscape resembles a folder in your Windows file manager. Everyone is familiar with Windows Explorer. It is used to organize your files. All your files have to be under a folder. For an individual file, it can only be under one folder. This principle applies to Biblioscape folders as well. In Biblioscape, each reference, note, task, chart, and category has to be under a folder, and it can only be under one folder. You can move a record from folder to folder, but it cannot be under two folders at the same time.

Under a Windows Explorer folder, there could be many files of different kinds. Some are Word documents, some are picture files, etc. But under a Biblioscape folder, there can be only one type of record. You cannot put a reference and a note under the same folder.

##### Creating a folder

To create a folder, you can go to "File | Project | New Folder...". First, give your folder a name. Next, select what kind of folder you want to create. There are 5 types of Biblioscape folders: References, Notes, Tasks, Charts, and Categories. There are 2 types of projects you can select that

are not folders: Containers and Compositions.

**Project Properties**

**General**

Name: my test folder

Type: References

Kind: Folder

Location: Folders > Hard Science > Xylanase homology

Description:

Mark  Web post hide

Created by: Trial User at: 3/9/2009

Modified by: at: 3/9/2009 10:43:45 PM

OK Cancel

- **References** Any published works that you want to study for your research project, or cite in your own writing.
- **Notes** A collection of ideas, comments, and annotations made while you read your references.
- **Tasks** Any tasks related to your research projects.
- **Charts** You can draw a chart and link chart objects to other records in your database.
- **Categories** A collection of concepts used to tag other records.
- **Container** A container is used to organize folders, collections, and smart collections. You can create a container and put other project items under it.
- **Composition** Composition cannot be a folder. It is a collection of notes. You can create a composition project to write a thesis or a book. It is designed to handle a big writing project.

Since we chose to create a new folder, "Folder" will be shown after the "Kind:" label. The folder path is shown next to the "Location" label. Under the "Descript" label, you can enter text to describe what the new folder is about. For individual users, this can remind you of why this folder was created. When using Biblioscape in a group environment, a folder description can tell others why this folder was created. Biblioscape allows you to flag a folder. Click the "Mark" check box, then select a flag color. If you don't want records in this folder to be made available on the Web, check the box "Web post hide". Click the "OK" button to create the new folder.

### Using folders

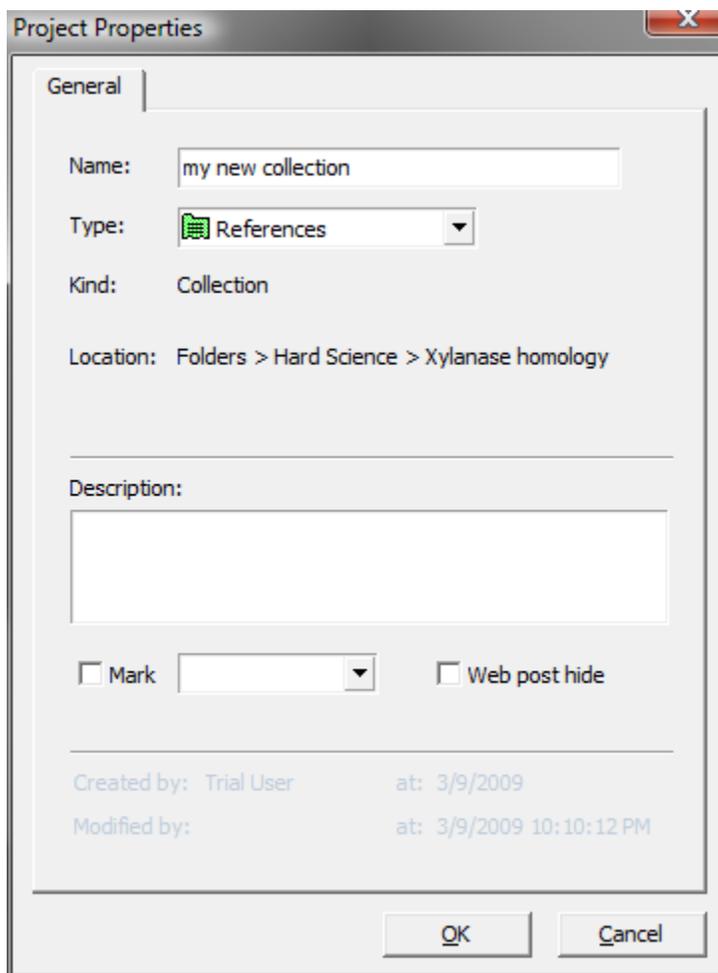
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Folders are the primary tool for organizing your research projects. Collections and smart collections are complementary tools. When you add or import records, the new records must reside in a folder. You can create many folders for different projects. Sometimes, you may want to retrieve records from several folders. Biblioscope allows you to do that easily. Just hold down the Ctrl key and select folders of the same type. All the records in the selected folders will be displayed in the list view.

## 3.2 Folders vs Collections

As your records collection grows, there may be a need to put a record in more than one folder. This is not possible with folders because a record can only reside in one folder, but you can create a virtual folder called "collection". A collection doesn't contain any records, it only links to your records. When you click on a collection, all the records linked to it will be retrieved and it looks just like a folder. On the project pane, a link icon will be displayed in the last column. Collections can be used as a handy tool to organize your records. For example, if you need to create a list of all the references for a new report, you can just create a collection. Then, drag and drop references from other places to this collection. The references you dragged are not moved to this collection; Biblioscope just creates a link so that all those records can be retrieved easily.

## Creating a collection



The screenshot shows a 'Project Properties' dialog box with the 'General' tab selected. The 'Name' field contains 'my new collection'. The 'Type' dropdown is set to 'References'. The 'Kind' is 'Collection'. The 'Location' is 'Folders > Hard Science > Xylanase homology'. There is a 'Description' text area. Below it are two checkboxes: 'Mark' (unchecked) and 'Web post hide' (unchecked). At the bottom, it shows 'Created by: Trial User at: 3/9/2009' and 'Modified by: at: 3/9/2009 10:10:12 PM'. 'OK' and 'Cancel' buttons are at the bottom right.

Creating a collection is the same as creating a folder except "Collection" is shown after the "Kind:" label. You can go to "File | Project | New Collection...". The label "Collection" is shown. Enter a collection name and click the OK button.

## Folders vs Collections

Since folders and collections are similar, you may want to know how to decide whether to create a folder or a collection. The principle is to use folders for major projects or research areas, and to use collections for sub-projects or ad hoc projects. Keep in mind that both folders and collections are for managing projects. A project is something you need to accomplish. They should not be used to classify records. In Biblioscape, categories are used to classify records.

### Folders are exclusive

Because a record can only reside under one folder, folders are mutually exclusive. If you are a graduate student, you can create a folder to collect all the references that could be used in your thesis, and create another folder for a class you have to take. When you need to give a seminar about your research progress, you can create a collection and drag references from both folders into that collection. You can then generate a bibliography out of this collection for your seminar

handout.

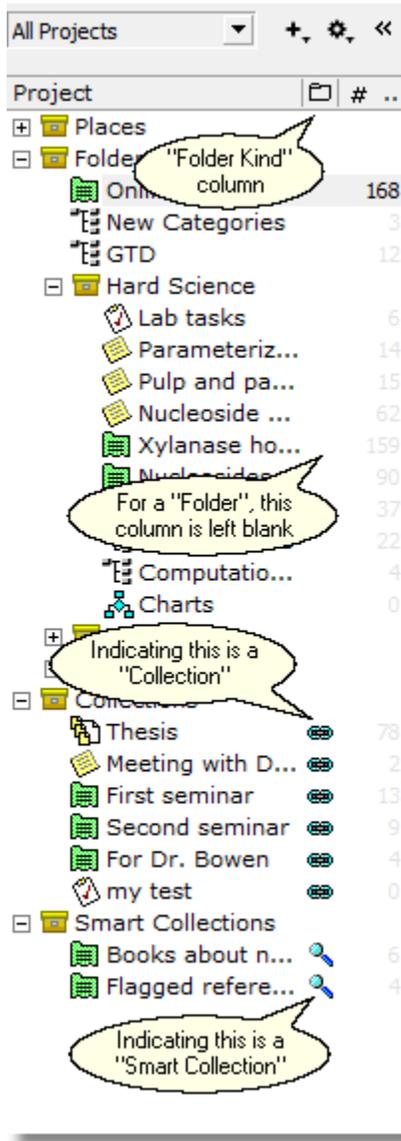
#### **Records must be in a folder**

Folders are used to store records. When creating or importing records, the new records will be added to a folder. If you open a collection and add a new record, the new record will be added to the last folder you opened and be put into the current collection as well. When you import records, only folders are listed as possible destinations. But, if you are in a collection before importing, the new records will be shown in that collection as well. In other words, all records must be in a folder. You can add or import records to a collection, but they still need to be in a folder.

#### **Remove records from a collection**

When you don't want to see a record under a folder, you can only delete it. If you don't want to see a record under a collection, you can delete it or remove it. If you chose to delete a record, it will be taken out of its folder and all collections. If you chose to remove it, the record will only be taken out of one collection. To remove a record from a collection, just click the right mouse button and select "Remove from Collection". The record will not be deleted; only the link between the reference and your collection is removed. You will not longer see the record under that collection, but you can still find the record in its folder or in other collections.

### 3.3 Save your searches as Smart Collections

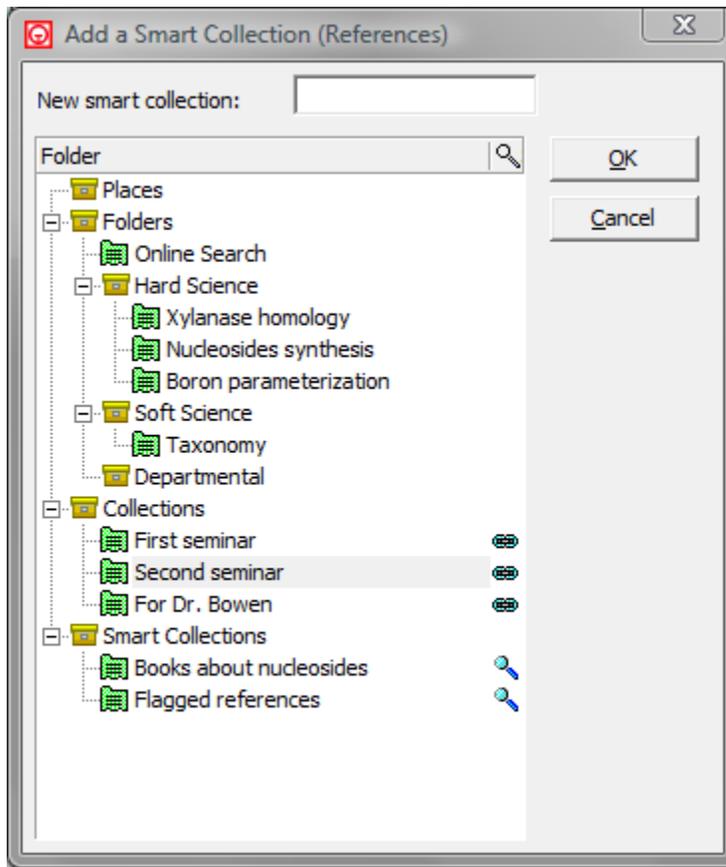


Folders are the places to add or import records. Collections are created to collect records from several folders. Both folders and collections represent a project, or something you need to accomplish. They are also static, which means that records have to be added to a folder, or dragged to a collection. There is another type of item in the project tree that is dynamic. They are called "Smart Collections". Smart collections are saved queries. When you define a frequently used query, you may want to keep it so that you won't have to re-define the query next time you use it. You can save the query as a smart collection. When you click a smart collection, it will retrieve all the records that satisfy the query. A smart collection can grow with your database. For example, you can have a smart collection that includes all the references containing a certain keyword and published by a certain publisher. When the smart collection was created, there were 10 records satisfying the query. Later, you add a new reference to your database that satisfies this query condition. If you click the smart collection again, the new record will automatically show up in that smart collection. Your smart collection grows to 11 automatically. In your project tree, smart collections are indicated by a special icon in the folder kind column.

#### Creating a "Smart Collection"



To create a smart collection, you have to run a search first. It can be a fast search, an advanced search, a lookup search, or a category search. At the top of the search tab, click the  button. A new window will be shown with all the folders, collections, and smart collections

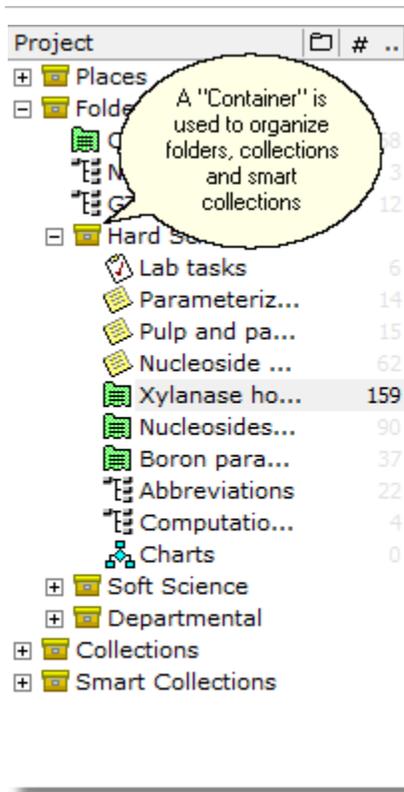


lists. Enter a name for the new smart collection, and select the place where you want to add it. Click the OK button to add.

Once a smart collection is created, you can right click the smart collection in the project tree and select "Properties". There will be a "Search" tab at the top. This tab is only available when viewing a smart collection item. You will not find this tab when viewing a folder or a collection item. Click on the tab, and you can see the search query in SQL. If you are not familiar with SQL, there is no need to see this.

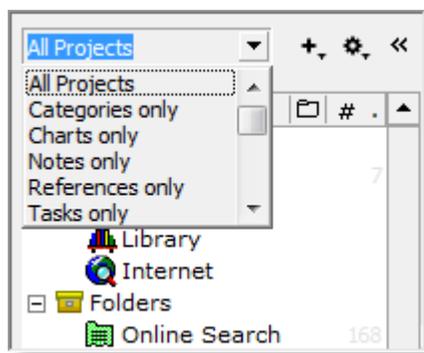
### 3.4 Organizing projects

#### Using "Containers"

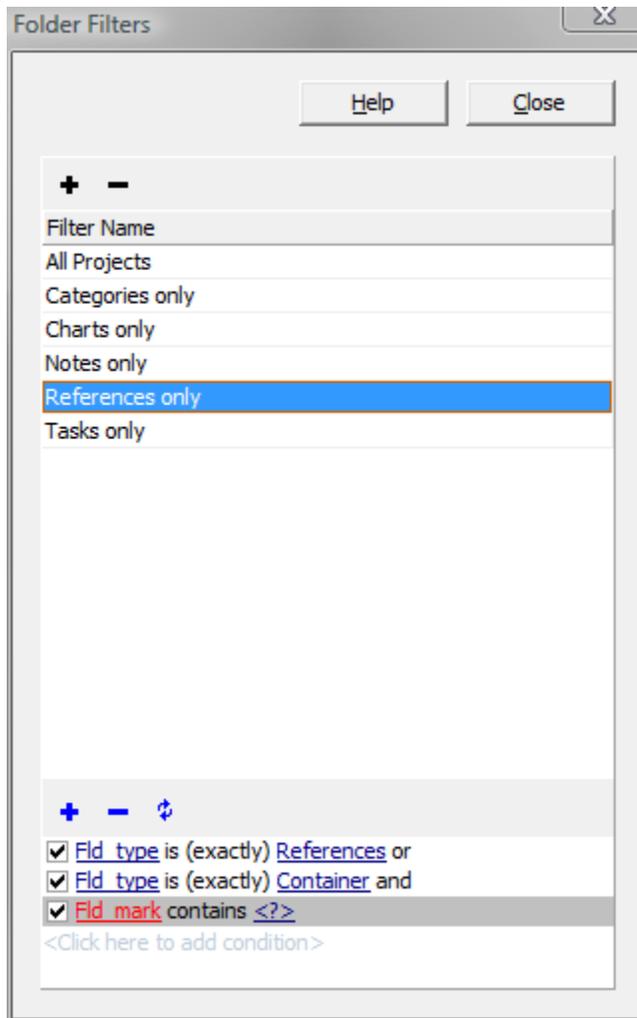


When you create a new database, there are 4 top level branches with yellow icons created automatically. They are "Places", "Folders", "Collections", and "Smart Collections". These are called "Container" items. They are used to organize folders, collections, and smart collections. For example, you may create two containers, one called "Work" and the other called "Personal". All your references folders and notes folders about your work are under the container "Work", while all references and notes folders about your hobby projects are under the "Personal" container. Some users may have one container about research and another one about teaching. Containers should be created with caution. In the physical world, a container is like a file cabinet. A file cabinet can have many folders. You may only have a few file cabinets designated to store all your research information objects.

#### Filtering projects

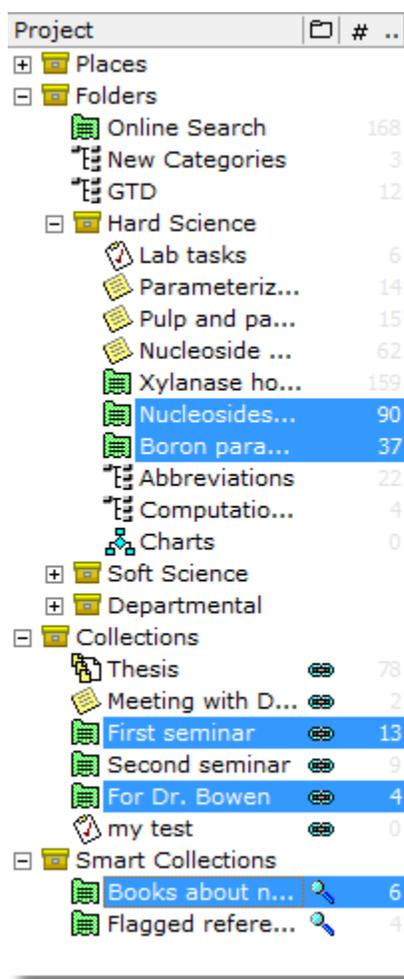


If you have a lot of items in the project pane, displaying all of them could be visually messy. You can use the projects filter to display only some project items. There are several pre-built filters like "References Only" to display only containers and references projects.



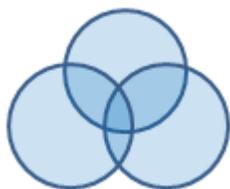
To modify an existing project filter or add a new one, Click "File | Project | Project Filters". When you select a filter, its conditions are displayed at the bottom. To add a new filter, click the black "+" button at the top. To add a condition, you can click the blue "+" button at the bottom or click the grayed text "Click here to add condition". First, click the field name in red and select a field name. The field names are self explanatory. Next, click the operator text next to the field name. Then, enter the search text by clicking the "?". You can click the logical operator at the end of each condition and chose from "and" and "or". Once you have finished adding filter conditions, you can click the  button to apply changes and to view the result live. Once you are satisfied with the filter, click the "Close" button.

Open multiple projects of the same type



In Bibioscape, you can open several project items at the same time, but the project items have to be the same type. For example, if the first opened item is a references folder, you can hold down the Ctrl key and click another references folder, collection, or smart collection, but you cannot click a notes folder. After each click, Bibioscape will display the combined records of your selections. For example, if you click a folder with 90 records and click another folder with 37 records, the total records will be 127. But, if you click a collection that has 13 records, and click another collection with 4 records, the total number of records may not be 17 because for collections and smart collections, a record may appear in several collections. The total number of records from your multiple selections will be the combination of unique records.

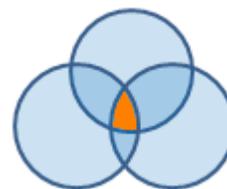
If you want to find only those records that appear in all the selections, you can first hold down the Alt key, then hold down the Ctrl key and use the mouse to click a collection or smart collection. Only records residing in both collections will be shown. Since a record can only reside under one folder, this feature will not be useful if you select multiple folders. It will be a very handy tool for collections and smart collections.



Each circle represents a selection (folder, collection, smart collection)



Hold down the Ctrl key to get the combined unique records among 3 selections (blue)



Hold down the Alt+Ctrl keys to get records that reside in all 3 selections (orange)

Placement of a smart collection

A smart collection is just another name for a saved query. In Bibioscape, the placement of a smart

collection matters. If you put it under a "container", a smart collection will retrieve all the records that satisfy the saved query. If you put a smart collection under a folder or another smart collection, it will retrieve only those records that satisfy its own query conditions, plus the query conditions of its parent. For example, if you have a smart collection to retrieve all the references that are marked, and you put this smart collection under a folder, it will only retrieve all marked references under that folder. When used cleverly, this feature can save query building time. You can have well designed smart collections and re-arrange them to form new queries. In Biblioscape, this feature is not turned on by default. You can turn it on by going to the "Help | About" window. On the "General Display" tab, check the box "Smart collection inherits parent properties".

Smart collection inherits parent properties

# Collecting references

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



IV

## 4 Collecting references

Biblioscape is essentially a database management program of research information. The two most important sources of research information are: references and notes. For references data, it has become very easy to capture records directly into your database from the Internet. For notes data, it is likely you will manually enter the text over time as you annotate references, write down research notes, etc.

This chapter guides you through the first stage in the Biblioscape workflow. You will learn how easy it is to search and capture references on the web, search and capture book data available at your university libraries, import references from other programs or traditional sources like CD-ROM, as well as how to quickly enter a full reference by just typing a few words. The core of references importing in Biblioscape is the import filters. You will learn how to modify an import filter to better fit your needs, as well as how to create a new import filter in case no existing import filter can import your data source.

### 4.1 Capturing references from your Web browser

In Biblioscape, "Online Search" is the easiest way to get references into your database. Google Scholar is one of the largest citation databases, and it is free. But, if you need to use a Web browser to search references from other citation database providers, Biblioscape also provides easy ways to import your references.

#### [Capture references with Direct Export](#)

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Some web based citation database providers display a download button to send your search results directly into your bibliographic software. Biblioscape supports such a feature even if Biblioscape is not listed on their web page. Many citation database providers, such as Highwire Press, Ovid, OCLC, ProQuest, the ISI Web of Science and others, provide direct export of references into bibliographic software. Click here to learn more about Direct Export.

#### [Capture references using Biblioscape integrated Web browser](#)

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There are large amounts of bibliographic data freely available on the Web. The Biblioscape integrated Web browser allows you to go to a Web based bibliographic database, do your search, and capture search results directly into your local database. Almost all commercial bibliographic database providers offer their product on the Web. For most Z39.50 catalogs, there is also a Web based interface, so searching through a Web browser allows you to access almost any bibliographic database on the Internet. The easiest way to capture references from a web browser is to use Biblioscape's integrated browser by going to "Places | Internet" in the project panel.

The screenshot shows the NCBI PubMed website interface. The search results for 'apple' are displayed in MEDLINE format. The 'Resources' panel on the right shows a list of subjects, with 'PubMed - Medline' selected. Callouts provide instructions on how to use the 'Resources' panel and the 'Capture References' button.

Callouts:

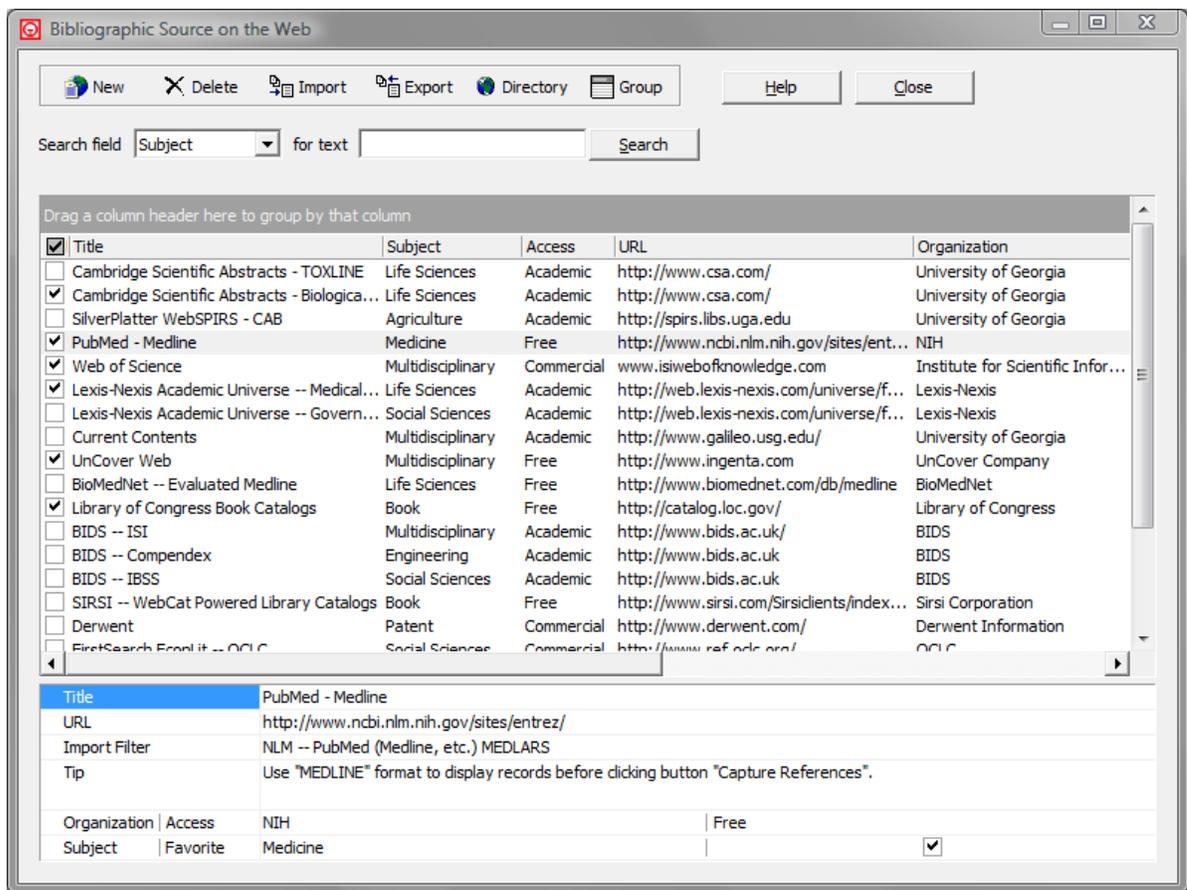
- Click "Resources" to display a list of Web sites that are associated with an import filter
- A tip is displayed about the Web site
- Click the "Capture References" button to import references displayed on the Web into Bibloscape
- Click "Internet" to use the integrated Web browser
- Display your hits in the right format that is required by the associated import filter
- Double click to go to a web site that is associated with an import filter

Search results for 'apple':

1: [Hoang TC et al.](#) Exposure routes of copper: Sh...[PMID: 19364620]

PMID- 19364620  
 OWN - NLM  
 STAT - Publisher  
 DA - 20090414  
 IS - 1879-1298 (Electronic)  
 DP - 2009 Apr 11  
 TI - Exposure routes of copper: Short term effects on survival, weight, and uptake in Florida apple snails (Pomacea paludosa).  
 AB - The uptake and effects (survival, weight) of copper (Cu) on Florida apple snails (Pomacea paludosa) via exposures to copper-enriched agricultural soil-water and water-only treatments were investigated. Soils were collected from citrus sites in south Florida and flooded with laboratory freshwater for 14d. Neonate apple snails (96-h-old) were then exposed to either Cu from a soil-overlying water (i.e., flooded agricultural soils) treatment or overlying water-only (i.e., equilibrated overlying water produced from 14d flooding of agriculture soils) treatment for 14d under

To successfully capture bibliographic records from a Web page, you need the right import filter. Bibloscape users can create a new import filter or edit existing ones. In the web resources panel, each web site is associated with an import filter. An import filter requires the references to be displayed in a certain format. Some web sites give you several options to display the search results in a different format. Before clicking the "Capture References" button, you need to display the hits in the required format.



You can add more items to the Web resources list. Go to the menu command "Web | Organize Resources...". There, you can add or delete individual resource items. You can also export or import the whole list. All the fields of a resource item are listed at the bottom panel.

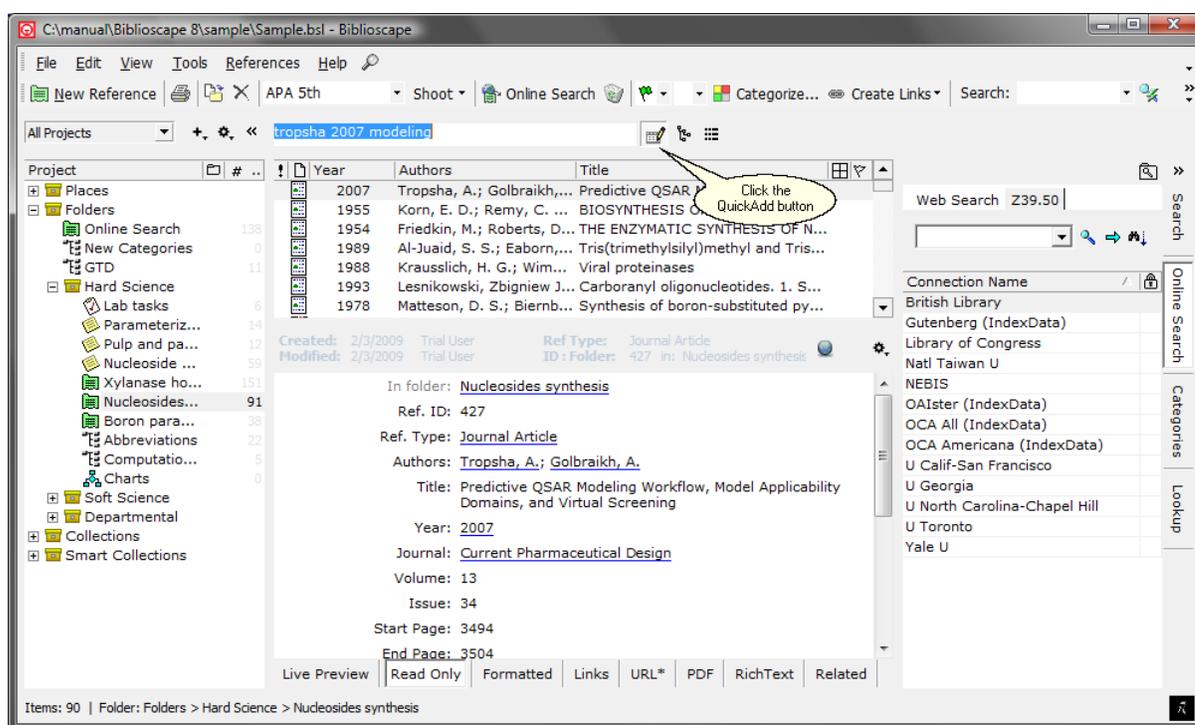
- Title: Title of the resource item. Enter the company or organization name first followed by the database name separated by " -- ".
- URL: The Web address of your resource.
- Import Filter: Which import filter to use when users click the "Capture References" button.
- Tip: An import filter requires the record to be displayed in a certain format. In the Tip field, you should remind yourself how to display the search results in order to meet the requirement of the associated import filter.
- Organization: Organization or company name for the database provider.
- Access: Choose from "Academic", "Commercial", or "Free" for the web site. Commercial sites require passwords to access. If you are using a computer on campus, your school may have already licensed the database for students and faculties.
- Subject: Choose a subject name for the site. This makes it easy to browse your list when the

number of sites increases.

- Favorite: Check the box to mark the site as a favorite.

## 4.2 Adding references by Quick Add

In the old days, you had to manually enter a reference. Now, most of your references collection probably comes from online searches. There are still times when you know a reference's author, publication year, and you just want to enter it into your database quickly without going through an online search. Biblioscape provides such a tool for you to quickly add a reference with minimum typing.



*Reference Quick Add is the easiest way to add a reference to your database.*

1. Go the folder where you want to add the new reference. Click the Quick Add button  below the toolbar to bring out the Quick Add box.
2. Enter the text you think will uniquely identify a reference. Usually, it is the first author's last name, the year it was published, and a few words in the title. Press the Enter key. Biblioscape will search the Web to find the reference you want and add it automatically to the current folder.

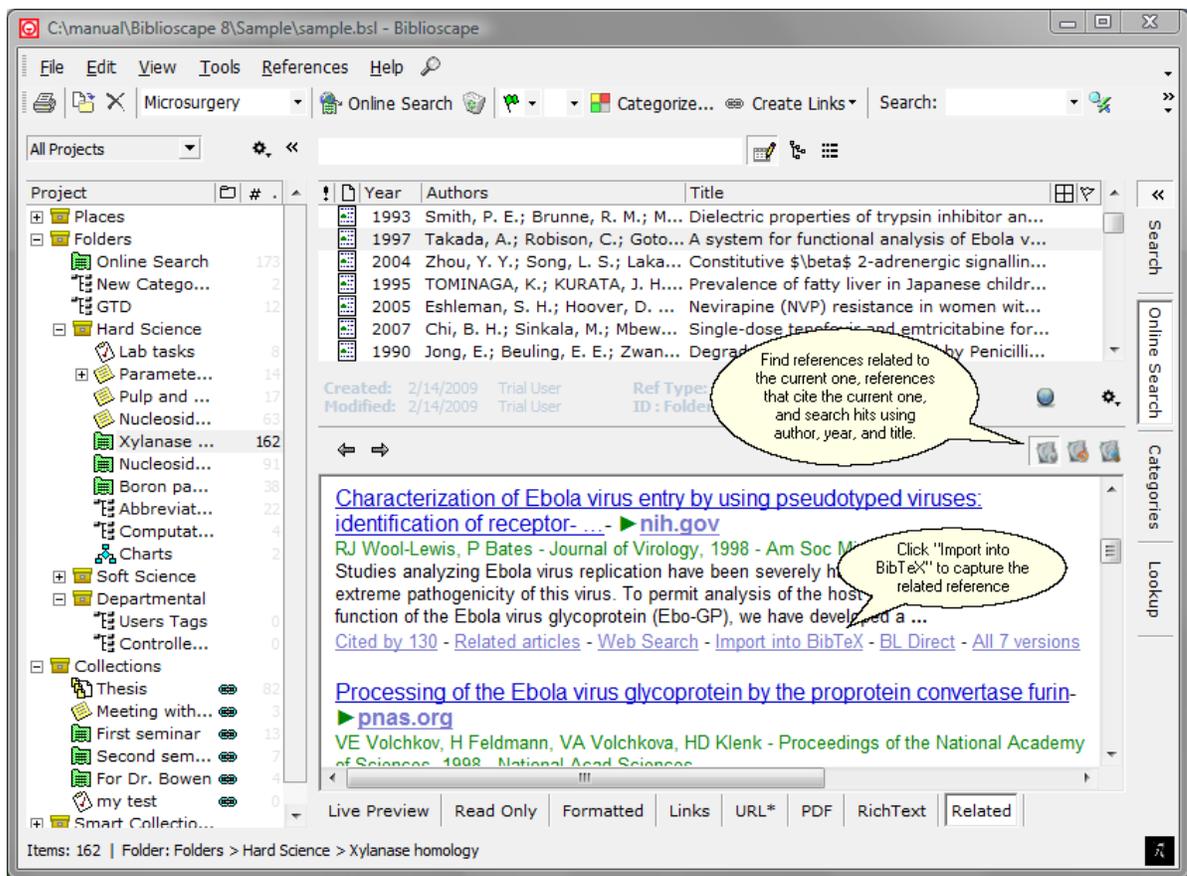
Note: The goal of reference Quick Add is to enter a reference with minimum typing. For example, if you know an author has published only one paper in 2007, you can just type the last name and the year. If you are not sure about the publication year, you can just type an author name and a few

words in the title. Biblioscape may be able to find a match without a publication year. While searching for a match on the Web, Biblioscape will also check if the full text is available. Once a match is added, and the "PDF" tab at the bottom of the preview panel is changed to "PDF\*", it means that the full text in PDF is available. You can click the "PDF\*" tab to view it inside Biblioscape. If the full text is available as a web page or more information about full text availability can be found on a Web page, the "URL" tab will be changed to "URL\*".

### 4.3 Getting related references

Biblioscape can automatically find references that are related to your current selection. When you browse references, you can click the "Related" tab at the bottom of the preview pane. All related references will be shown in a browser window. There are several ways to find related references. You can switch between the 3 ways by clicking the buttons at the top of the "Related" pane.

- **Related:** Biblioscape uses Google Scholar to find related articles. If you have used Google to search web pages, you may be familiar with the "Similar pages" feature. "Related articles" is similar to the "Similar pages" feature. Instead of web pages, it will find related references based on Google's proprietary algorithm. The result is very satisfactory in most cases. With this features, you can quickly expand your reference collection and find useful references easily.
- **Cited by:** Google Scholar has one of the largest collections of references. It also tracks when and where a references is cited in other research publications. This kind of feature was only available in some commercial citation databases. Now, Google provides this service for free, and it is very easy to use. If you click the "Cited by" button, Biblioscape will display all the references that have cited the current selection based on Google Scholar.
- **Search:** When this button is clicked, Biblioscape will simply take the last name of the first 3 authors of the current reference, plus the publication year, and the first few words in the title, and run a search against Google Scholar. The result will be displayed in the Related tab.



You can capture a related reference into your database with a single click. When viewing related references, you can click the "Import into BibTeX" hyperlink. Biblioscape will automatically import the reference into your database. If you are in a folder, the new reference will be imported into that folder. If you are in a collection, the new reference will be imported into the last opened folder, and also added into the current collection.

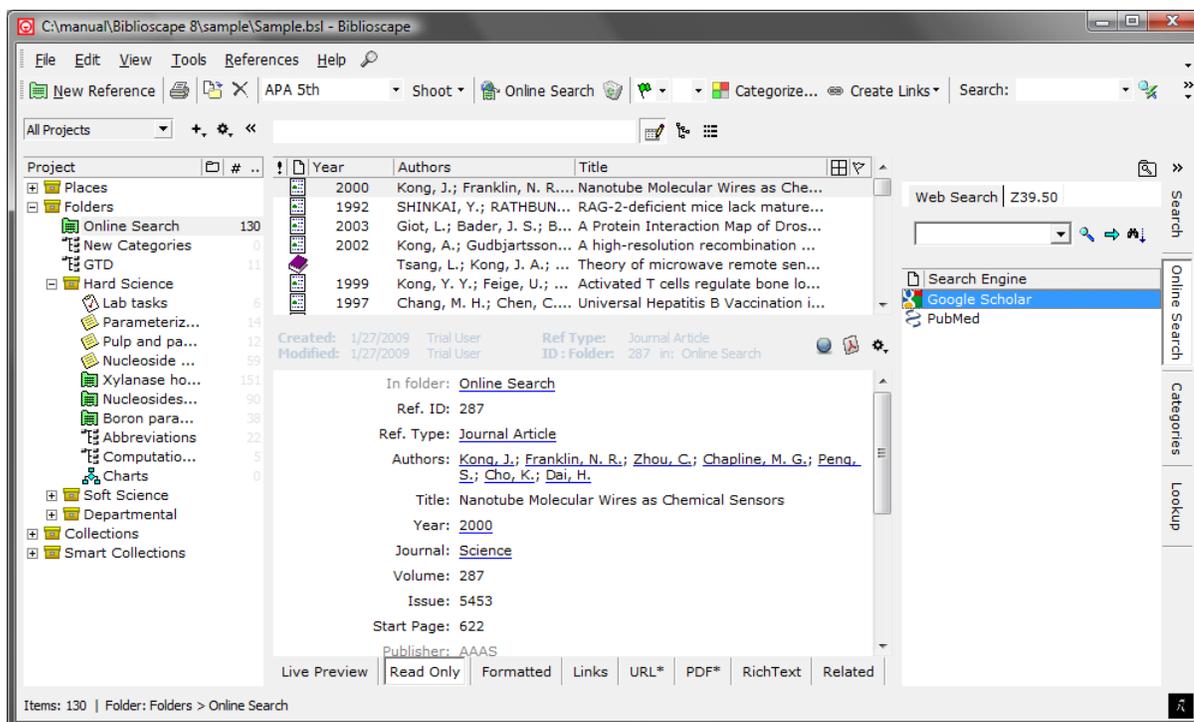
## 4.4 Getting references by Online Search

Collecting references is an important part of research. Writing a research paper usually starts with reference search and collection. After receiving a research topic, the first thing people do is fire up a Web browser and read all you can find about the topic. Once you know the background knowledge, you want to read what other researchers have published in this area. In the old days, this was a time consuming process. It meant many trips to the library. You first used your library computer to search a commercial database that could only be accessed inside the library. This will be followed by many ups and downs in the elevator and many hours of photo copying journal articles. This has now all changed thanks to Google, and the law passed by congress to make the full text of all government funded research freely available to the public. Now anyone can access quality citation databases like Google Scholar and PubMed from anywhere at anytime. Biblioscape makes this process even smoother by combining the reference searching and collecting operations

into a single step.

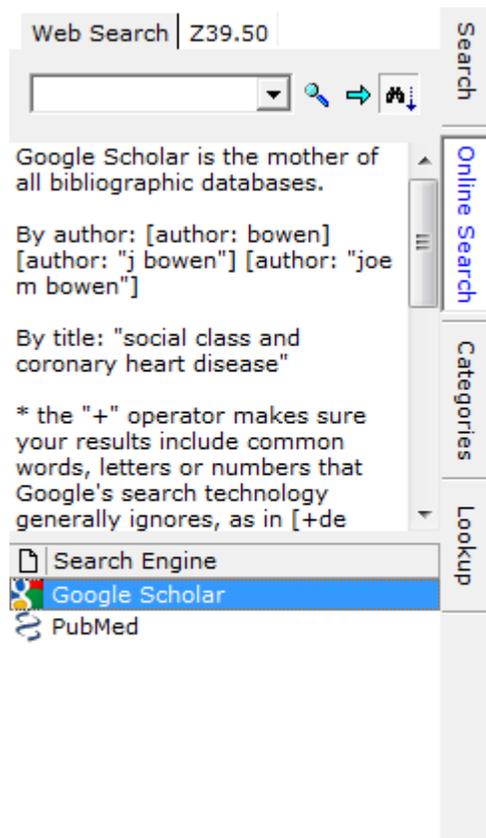
#### 4.4.1 Collecting references by Web Search

"Web Search" is on the Bioscience "Online Search" tab which is in the search panel on the right. To access the "Online Search", you can click the "Online Search" button in the toolbar, or the "Online Search" tab on the right. Click the "Web Search" tab at the top of the "Online Search" tab; you can now search some of the most popular citation databases on the Web.



1. First, you need to select the search engine to use. Google Scholar is the most popular one. It covers many subject areas in both the hard and soft sciences.
2. Enter your search terms in the combo box at the top and press the Enter key to start searching. All your search terms are saved for future reuse. Click the down arrow of the combo box to display a list of previously used terms, select one, and click the Run button  to re-run the search.
3. Bioscience will automatically capture the first batch of your search results and put them in the "Online Search" folder.
4. If the first batch doesn't contain the references you want, you can click the right arrow button  and download the next batch. If you are not familiar with the search engine, click the configure button  to display search tips. You can add extra conditions to fine tune

your search.



5. The last step is to select the hits that you want to keep, and drag them to a references folder, then drop. This will move your search results from the "Online Search" folder to the folder where you want to keep them permanently, because the "Online Search" folder is only a temporary place to store your search hits. You may want to empty this folder by clicking the "Empty Online Search Folder" toolbar button once there are too many unwanted records.

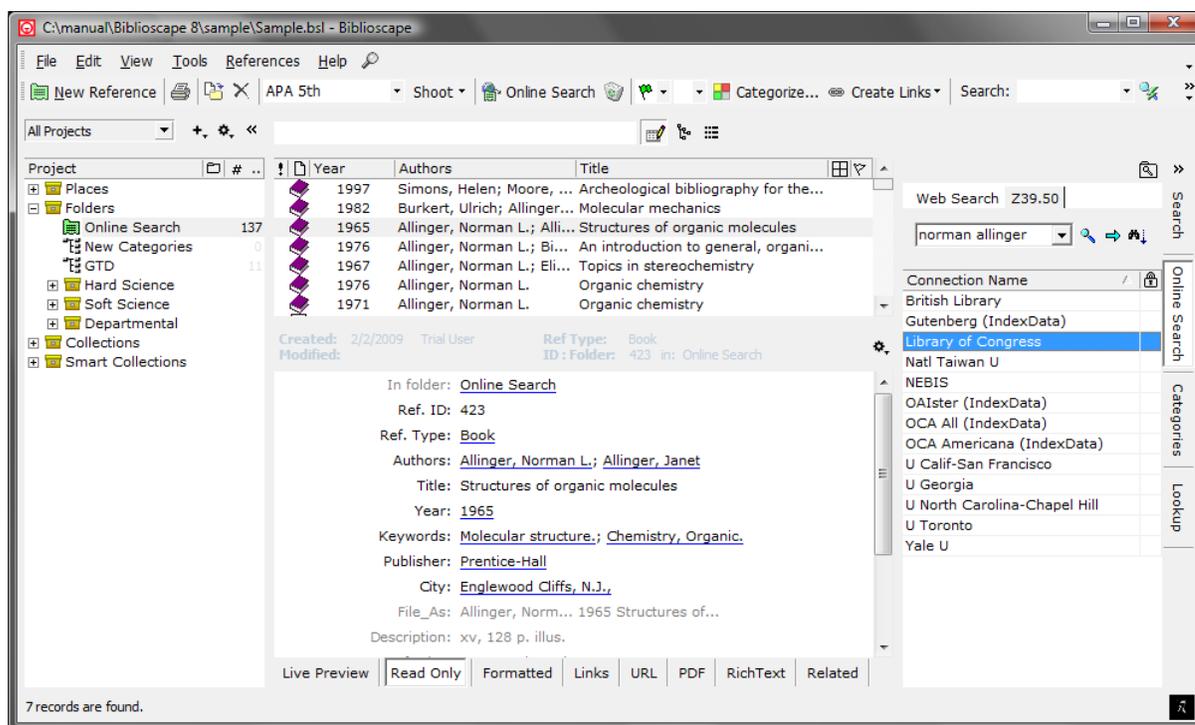
Note: If your search hits were published in recent years, it is likely its full text is available on the Web. Bibloscape will add an asterisk \* symbol on the "PDF" tab if the reference's full text is available in PDF format. Click the "PDF\*" tab to view the PDF file inside Bibloscape preview panel. If you want to display the PDF file in an external program, click the PDF button  in the preview panel. If the full text is available as a Web page, or the full text purchasing information is available on a Web page, the "URL" tab will become "URL\*". You can click the "URL\*" tab to view the Web page inside Bibloscape. Click the Web button  in the preview panel if you want to display the Web page in a Web browser instead.

Note:

- Google Scholar is a freely-accessible Web search engine. It provides a simple way to search scholarly literature. It indexes the full text of scholarly literature across an array of publishing formats and disciplines. It is estimated that Google Scholar indexes over 500 million documents. In quality, quantity, and utility, Google Scholar compares favorably to all the commercial databases.
- PubMed is a free search engine for accessing the MEDLINE database for citations and abstracts of biomedical research articles. It is maintained by the US National Library of Medicine. MEDLINE currently has close to 20 million records from more than 5,000 journals published in more than 80 countries.

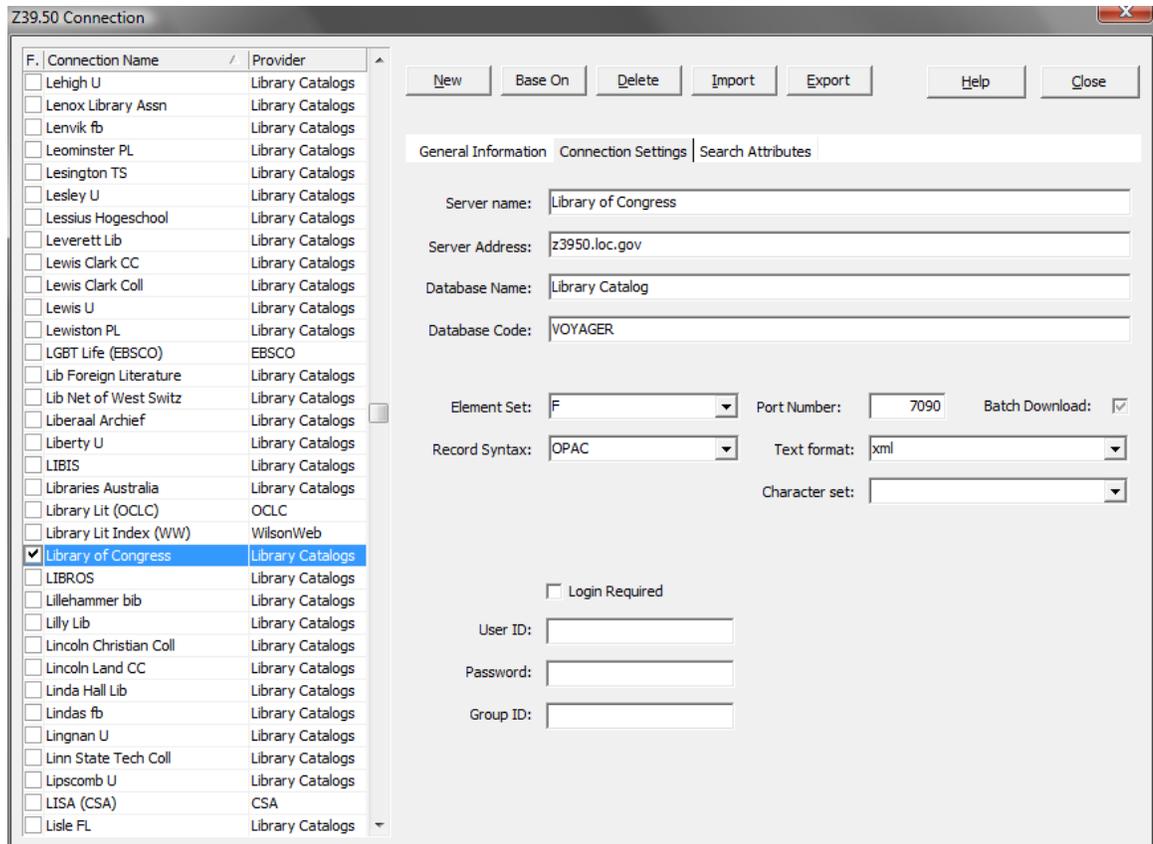
#### 4.4.2 Searching references by Z39.50

Z39.50 is a client server protocol for searching and retrieving bibliographic records between computers. The protocol standards are maintained by the Library of Congress. Most academic libraries make their catalogs available on a Z39.50 server. Biblioscape includes 2,000 plus pre-made connection files so users can search university library catalogs. In Biblioscape, after searching a Z39.50 source, the hits are automatically retrieved into your database.

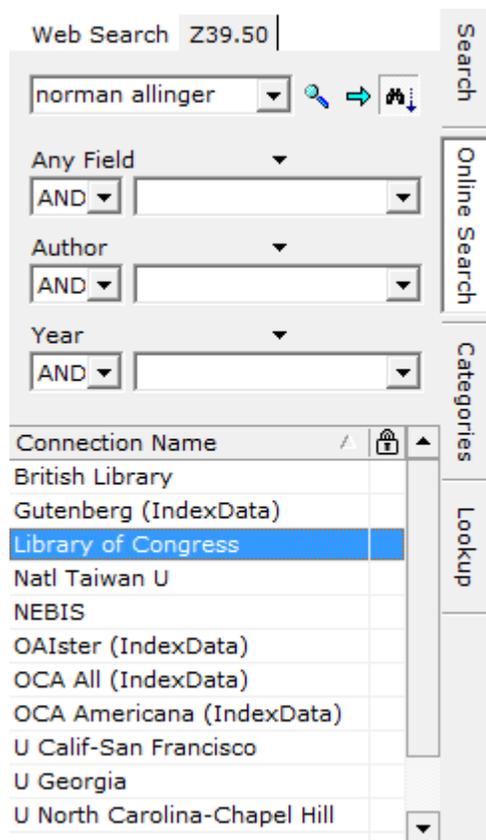


1. Click the "Online Search" tab of the search panel on the right, then click the "Z39.50" tab. You need to first select a Z39.50 source to search. Only the ones marked Favorite are

listed. There are many more sources available. Double click any source to bring up the "Z39.50 Connection" window to see the full list. Select the ones you want to search and click the Favorite check box. After closing the Window, it will be added to the Favorite list.



2. Enter your search terms in the combo box at the top, and press the Enter key to start searching. All your search terms are saved for future reuse. Click the down arrow of the combo box to display a list of previously used terms, select one and click the Run button  to re-run the search.
3. Biblioscape will automatically capture the first batch of your search results and put them in the "Online Search" folder.
4. If the first batch doesn't include the references you want, you can click the right arrow button  and download the next batch. If you want to build a more complicated query, click the configure button  to display the advanced search panel. You can add extra conditions to fine tune your search.



5. The last step is to select the hits that you want to keep, and drag them to a references folder. This will move your search results from the "Online Search" folder to the folder where you want to keep them permanently. Because the "Online Search" folder is only a temporary place to store your search hits, you may want to empty this folder by clicking the "Empty Online Search Folder" toolbar button once there are too many unwanted records.

#### 4.4.3 Adding a Z39.50 connection

Biblioscape comes with 2,000 plus Z39.50 connection files. Most of these are university and college library catalogs. The rest are public library catalogs and commercial citation databases. If there is a Z39.50 source you need to use that is not included, you can add it to Biblioscape easily. You need to know a few key parameters. The most important ones are: server address, database code, and port number. You are most likely to find these on provider's web site. Or, you can ask your librarian to find this information for you.

1. Select the "Online Search" tab in Biblioscape, and click the "Z39.50" tab at the top. To add a new Z39.50 connection, click the right mouse button and select "New Connection".
2. On the "General" tab, you have to enter many parameters. The most important one is the

## "Import Filter".

The screenshot shows the 'Z39.50 Connection' dialog box. On the left, a list of connections is displayed with checkboxes. The 'Library of Congress' connection is selected. The right pane shows the 'General Information' tab with the following fields:

- Connection name: Library of Congress
- Based On: Voyager
- Provider: Library Catalogs
- Favorite
- Last update: 20081021
- Import Filter: MARC 21 XML
- Comments: (empty text area)

- o Connection name: Enter a name for your Z39.50 connection. This name used for you to remember a connection, so you can use any name. Most connections in Biblioscape use a library's abbreviated name.
- o Based On: If the new connection you want to click shares many properties with an existing one, you can select the existing connection and click the "Base On" button to create a duplicate. You can then modify the different parts to make the new one. In such cases, the "Based On" field will be filled with the original connection name.
- o Provider: Enter the database provider's name. If it is for a university library catalog, enter the name "Library Catalogs". If the connection is for a commercial citation database, enter the company's name.
- o Favorite: Check this box if you want the connection to appear in the "Z39.50" tab. Since it is not necessary to display all available connections, only the ones marked as a favorite will be displayed on "Z39.50" tab.
- o Last update: The date you last modified the connection. Use a 6 digit number starting with the year followed by the month and date.

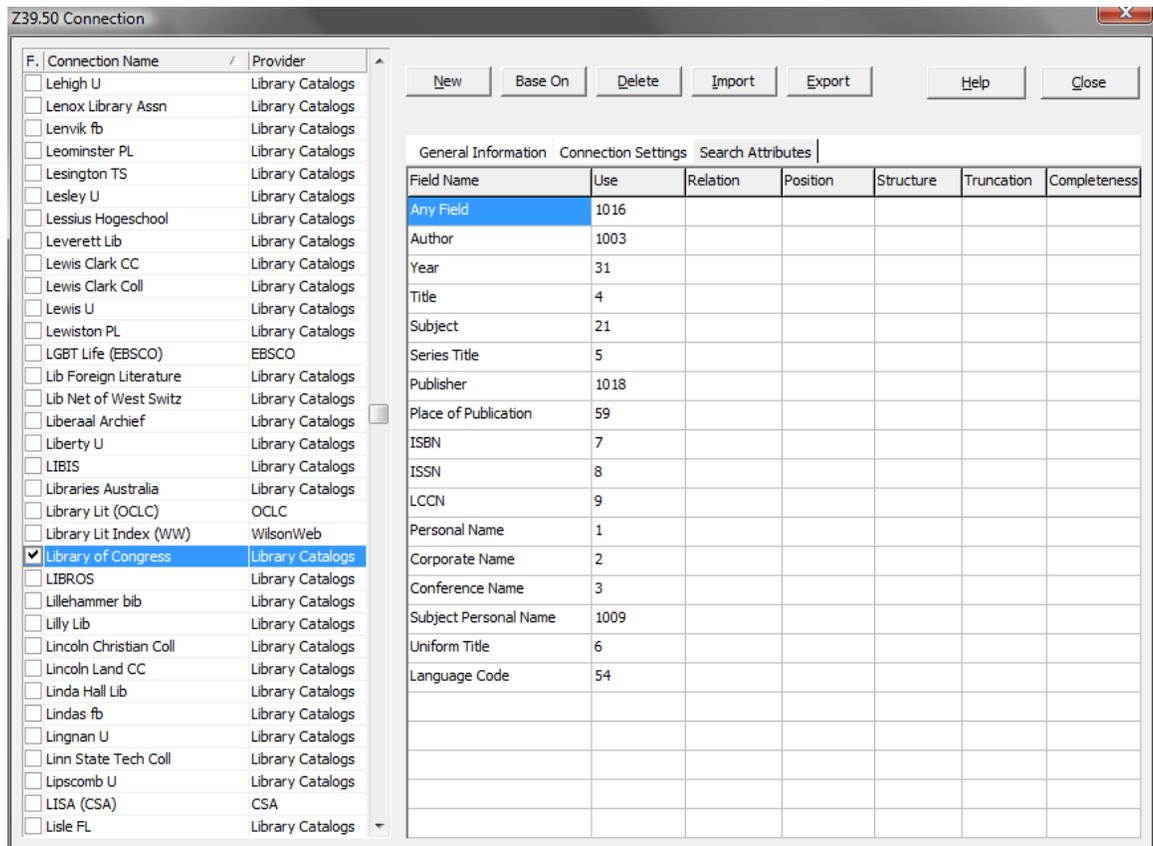
- o Import Filter: This is the most important parameter on the "General" tab. Setting it wrong will cause reference importing not to work. In most cases, select the import filter "MARC 21 XML". If your database provider is from East Europe, select the import filter "UNIMARC XML".
  - o Comments: You can add your comments here. If there are things such as searching tips and tricks about the connection, you should write it here for other users and future reference.
3. On the "Connection Settings" tab, you need to set 3 important parameters: server address, database code, and port number. You must get these 3 parameters correct. Otherwise, Biblioscope will not be able to connect to the Z39.50 server. You can get them from the database provider's web site. You can ask your librarian to help you find the information. Librarians are familiar with Z39.50 services that are available to your institution.

The screenshot shows the 'Z39.50 Connection' dialog box. On the left, there is a list of connections with columns for 'Connection Name' and 'Provider'. The 'Library of Congress' connection is selected. On the right, there are several tabs: 'General Information', 'Connection Settings', and 'Search Attributes'. The 'Connection Settings' tab is active. The fields are as follows:

- Server name: Library of Congress
- Server Address: z3950.loc.gov
- Database Name: Library Catalog
- Database Code: VOYAGER
- Element Set: F
- Port Number: 7090
- Batch Download:
- Record Syntax: OPAC
- Text format: xml
- Character set: (empty)
- Login Required:
- User ID: (empty)
- Password: (empty)
- Group ID: (empty)

- o Server name: Enter a common name for the Z39.50 server. You can use any name.
- o Server Address: Enter the domain name of the Z39.50 server. Domain name is a symbolic representation of the numerical IP address. If you don't know the domain name, you can enter the server's IP address instead.

- o Database Name: Enter a common name for the database you will be searching on the Z39.50 server. You can use any name.
  - o Database Code: This is the code needed to tell the Z39.50 server which database to use. If this code is entered incorrectly, your search will not work.
  - o Element Set: You can choose to return full results or brief results. Choose "F" in almost all cases.
  - o Port Number: This is the port used for communication between Biblioscape and the Z39.50 server. You must get this number correct.
  - o Record Syntax: This specifies the format in which the client wants to see the metadata. Choosing OPAC will work in most cases.
  - o Text Format: Choose the format for the data returned by the Z39.50 server. If you chose to use "MARC 21 XML" as the import filter, you have to choose "xml" to match it.
  - o Character Set: Choose the character set for the text returned by the Z39.50 server. If you leave it blank, ANSI will be used, and will work for most western languages.
  - o Login Required: Most Z39.50 services are free, but some services for commercial citation databases are not free. Your institution may have purchased the access. You can get the login information from your librarian. Check this box if the connection is not free and requires login information.
  - o User ID: Enter the user ID for login. Get this information from your librarian.
  - o Password: Enter the password for login. Get this information from your librarian.
  - o Group ID: Some Z39.50 services require a Group ID. Get this information from your librarian.
4. On the "Search Attributes" tab, enter a list of search fields supported by your server. You can find this information on the provider's web site. Ask your librarian if you cannot find it. If it is not possible to find these parameters, leaving them blank. Biblioscape still can let you search the server, you just cannot limit a search term to a database field.

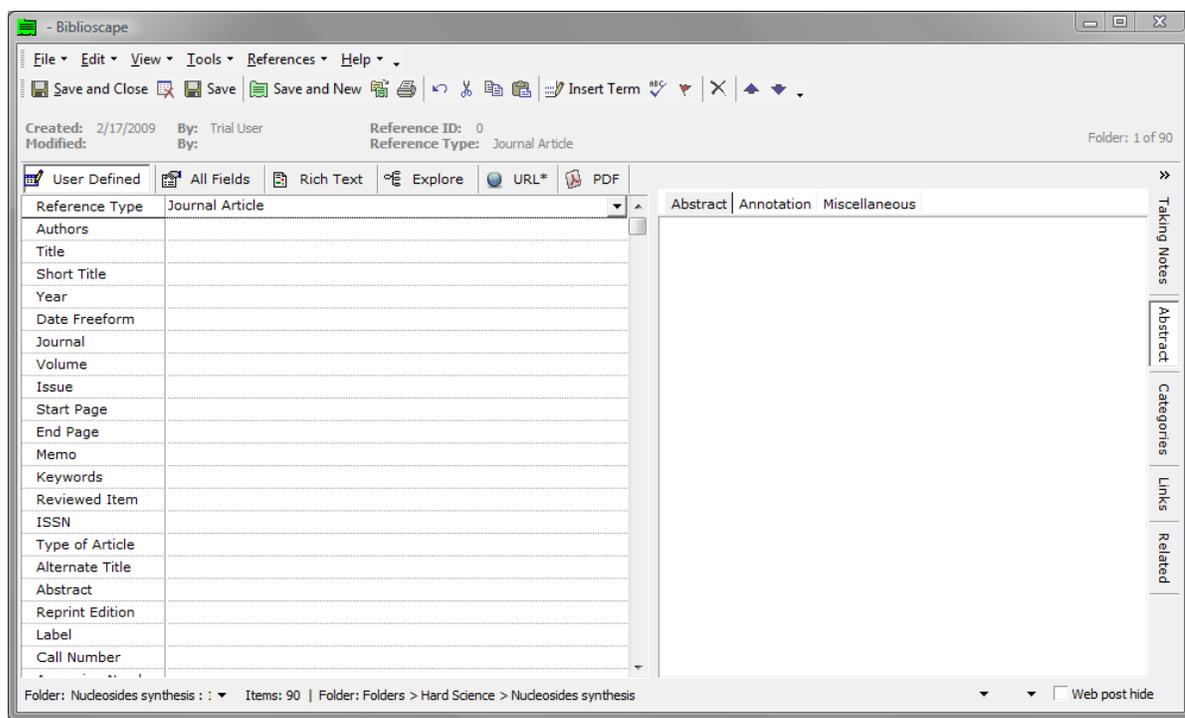


## 4.5 Adding and editing references by typing

The Biblioscape reference table has about 70 data fields. Not all of them are needed for a certain reference type. You can control which data fields are to be displayed in the reference editor by customizing reference types in the Options window.

### Add a reference by typing

Since there is "Online Search", Quick Add, and browser based Direct Export to help you capture references directly from the Web, typing a reference directly into your database has become a rare event. In case you have to add a reference manually, click the "New Reference" button on the toolbar or press Ctrl+N.



When creating a new reference, the first thing to do is to select the correct reference type. It determines how a reference will be formatted in a bibliography. Biblioscape comes with about 30 pre-defined reference types. If none of them meet your needs, you can create a custom reference type by going to the "Tools | Options" window "Reference Types" tab. After you select a reference type, the data field labels will change accordingly. Enter the data for all the relevant fields. Once you are finished, click the "Save and Close" button.

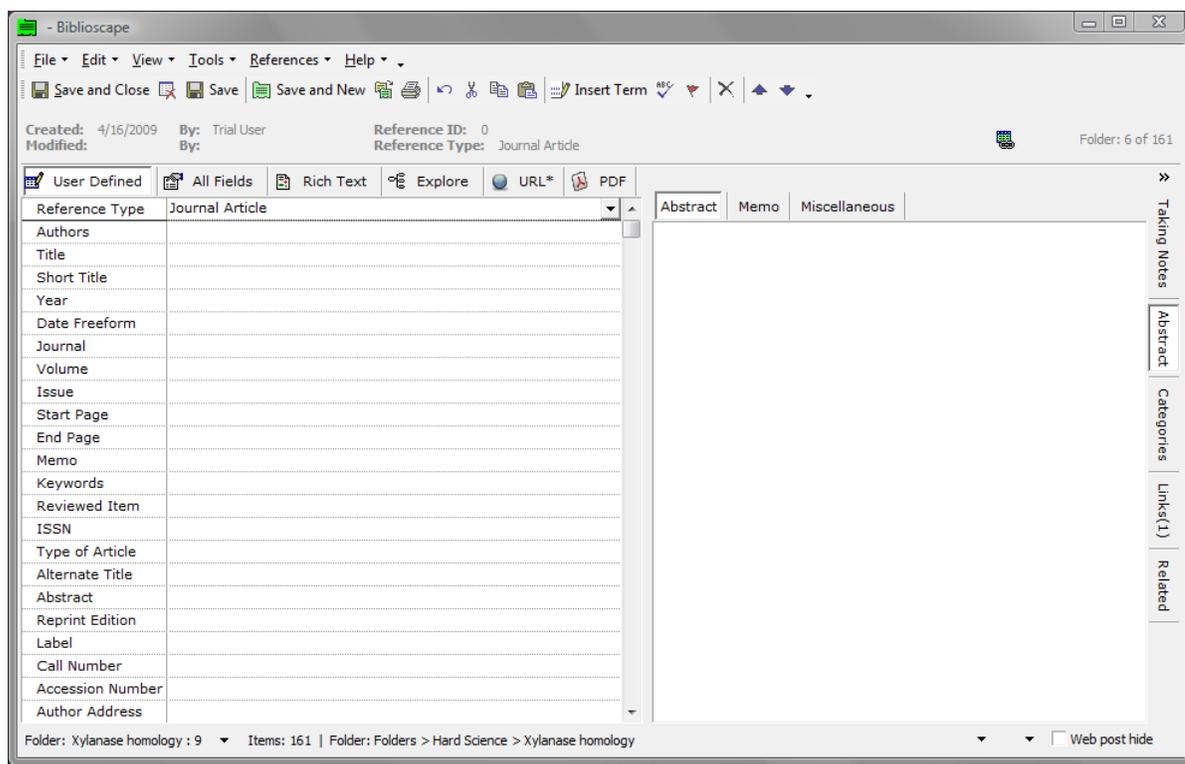
#### [Add a reference duplicate](#)

Sometimes, you may need to add a reference that shares most field values with an existing one. To save time, you can create a duplicate of an existing reference and then only edit the fields that have different values.

1. Double click the reference which you want to duplicate. This will open the reference in another window.
2. Click the toolbar button "Create Duplicate" (Shift+Ctrl+N).
3. After a duplicate record is created, change the field values that are different among the two references.
4. Click the menu command "Save and Close" .

### 4.5.1 Reference editor

The reference editor window was originally designed to enter a new reference by typing. Since you can enter almost all references by Quick Add or Online Search, this feature has become less important. New features have been added to the reference editor for other functions. The most useful new feature is to take notes of a reference. This will be explained in detail in the next chapter, "Taking Notes". To open the reference editor, find the desired reference in the reference list, and double click. Make necessary changes and click "Save and Close" to save changes and go back to the reference list.



#### [Edit a reference in live preview](#)

When you are in a reference list, the selected reference can be displayed in the preview panel. You can set the preview mode to "live" by going to menu command "View | Preview Pane | Live Preview". Under this mode, the text of reference fields can be edited. When you move to another reference in the list, the changes you made will be saved to the database.

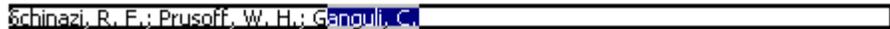
### 4.5.2 Edit a reference

When you browse to a reference, the content of the reference will be displayed in the preview panel in several forms: "Live Preview", "Read Only", and "Formatted". In the "Live Preview" tab, you can make changes to any data field, and the changes will save automatically. This is the easiest way to edit a reference. You can also double click a reference, open it in the reference editor, and make changes there.

## AutoComplete

---

For some data fields like "Authors", "Journal", and "Keywords", you often have to enter data that has already been entered before. When entering data into these fields, Biblioscape will look for a similar word while you are typing. The closest match will be displayed. If that is what you want to type, just press the Enter key to insert the suggested match. You can also use the Tab key to accept the suggestion and go to the next field at once.



If you prefer not to use the AutoComplete feature, you can turn it off. Go to the menu command "Tools | Options". On the "General Display" tab, uncheck the box "Enable AutoComplete in reference editor".



## Field lookup

---

Some data fields in the Reference table may have repeated values. For example, the "Language" and "Country" fields. To save some typing, and to keep data consistent, Biblioscape supports AutoComplete as explained above. Besides AutoComplete, you can also list all the unique values in a field. When you enter such a field, an icon  will be displayed at the end of the edit box. Clicking on the icon button will bring up the lookup Window with a list of unique values that have been entered for this data field. Select the term you want to enter, and click the "Insert" button.

## Change character font properties

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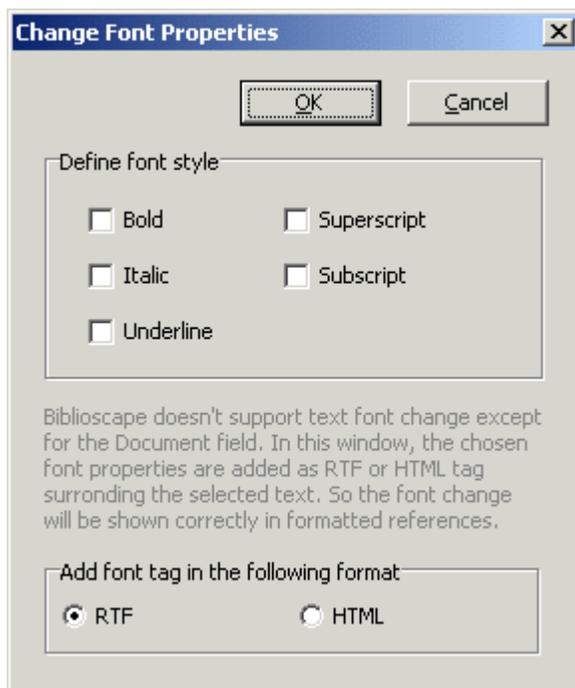
Biblioscape does not support formatting characters with font dialog except in the document field, but you can use the Biblioscape style editor to generate formatted records at the field level. For example, you can create a style to format Title field as italic. But, in some cases you may need to control the formatting of a few characters within a field. For example, you may want to format a character in Symbol font, or format a number as a superscript, while leaving the others be controlled by Biblioscape Style formatter. Biblioscape does support this kind of formatting by using the Rich Text Format (RTF) code. The following examples will show you how to do this in a few simple cases.

The basic idea is to add raw RTF code along with the normal text. So when Biblioscape generate bibliographies in RTF, the desired effect will be shown. To fully explore the power of RTF, you need to know the basics of RTF. Click [here](#) for a complete description of RTF. The RTF code can also be used in the Biblioscape style editor to make some truly fancy styles.

### Using menu command "Edit | Font Properties"

In Biblioscape 5.2, a new menu command "Edit | Font Properties" is added to simplify the

characters font change procedure. First you need to select the text that you want to change the font properties of. Then, go to menu command "Edit | Font Properties". Select the font styles you want to add. Click the OK button to apply the changes. Once the window is closed, the RTF font properties code will be added around the text you have selected. For example, if you have selected the text "high temperature" and you add "Bold" in the "Change font Properties" window, the text will now be changed to "{\b high temperature}". In the reference formatted preview pane ("View | Preview Pane | Formatted Preview"), the text "high temperature" will be shown in bold. If you need to generate the formatted bibliography in HTML format, please check the box "HTML" instead "RTF" in the "Change Font Properties" window. The HTML font properties codes will be added instead. In the example given above, the text will be changed to "<b>high temperature</b>". HTML codes won't be displayed correctly in the formatted preview pane. You only need to add HTML code if you plan to generate the formatted bibliography in HTML format.



### Format characters in Symbol font

Case: Format 3 characters inside the Title field with the "Symbol" font.

Original: The effect of a,b-Phentoxol in Cancer Treatment

Desired: The effect of  $\alpha,\beta$ -Phentoxol in Cancer Treatment

To Do: The effect of  $\{\f1 a,b\}$ -Phentoxol in Cancer Treatment

Note: At the first line of the file "preview\_rtf\_header.txt" under the "...Global\" folder, you can find the font definition section "{\fonttbl\...}". Several font names are listed. Each is given a font number. Find the font number for the font you want to change to. If the font you want to use is not

listed, you can add it to the "fonttbl" section and give it an unused number.

#### Format characters as Bold, Underline

Case: Format 6 characters inside the Title field as bold and underlined.

Original: The 2nd Gordon Conference in Reno

Desired: The 2nd **Gordon** Conference in Reno

To Do: The 2nd {\b\ul Gordon} Conference in Reno

Note: "\b" indicate bold, "\ul" indicate underline. "\sub" for subscript; "\strike" for strike through; "\i" for italic, "\super" for superscript.

Note: The above code examples are for RTF format. If you need to generate a HTML file directly by Biblioscape, you need to replace the RTF code with HTML code.

#### Enter full text, graphics, and OLE objects

With Biblioscape, you can enter the full text of a reference into the Document (Ref\_doc) field. The size limit for the document field is 256 MB, so it should be more than enough in most cases. The Document field can also include graphics and OLE objects. The OLE support makes it possible to store other types of information, like a chemical structure drawing, a CAD drawing, an Excel spreadsheet, etc. In Reference Editor, click on the "Document" tab, then use the built-in editor to enter whatever you want and format it the way you want to display it. Besides the standard options to change font, size, color, paragraph alignment, etc., you can also change highlight color (background color), superscript, subscript, and even insert a table.

Note: The text, graphics and OLE are saved into the data field Ref\_doc in Rich Text Format (RTF). RTF does not support graphics and OLE efficiently. If the graphics are in high resolution with more than 256 colors, the RTF code could become very large. This will slow down the search index building process. If you need to put lots of high color graphics and OLE objects into the document, we recommend you use Word to save it as a document file on a local disk. Then, enter the full path of the file into the "Attachment" field of the reference, instead of saving everything into the Document field.

### 4.5.3 Reference data fields

The following is a list of all the data fields in a reference record. A generic label name is in bold face. The table field name, its data type, and field length (amount of data each field can hold) are listed in parenthesis. The field length can be changed with the "...\Tools\DBSys.exe" utility. You can increase the field length to store more data, or decrease it to save some disk space. A brief explanation about each field is also listed.

#### Abstract

(Abstract: memo: 256MB) An abstract is a summary of the full content. When you download

references from the Web or import references from a commercial citation database provider, a reference most likely comes with an abstract. This abstract is usually provided by the publisher. It is a purely descriptive summary. It is not suited to be used in an annotated bibliography. You should use the Memo field to write a descriptive and critical summary to be used in an annotated bibliography.

#### Accession Number

---

(Accession\_Num: char: 20) For storing an ID number used by data providers. A lot of citation database providers include their own ID in the export file. You can map such an ID to this field in the import filter. For example, the "PMID" can be imported into this field when searching PubMed. This field can also be used to store any locally-meaningful number, a universal code number, or whatever you need for identifying a record. When you import records from other software and you need to keep the original record IDs, you can create or edit an import filter to map its ID field to the Accession Number field in Biblioscape.

#### Address

---

(Address: char: 255) Principle author's mailing address, or the author's affiliation.

#### Attachment

---

(Attachment: char: 255) For storing the full path of the file associated with the reference on your local disk. If the file type is associated with a program, clicking on the attachment button will launch that program and open the file. It works like an email attachment. If the full text of a reference is available in a PDF file on your local computer, you should put the PDF file path in the attachment field. If the PDF is available on the Internet, you should put its URL in the attachment field. Biblioscape can display the PDF inside your Biblioscape preview panel.

When a new database is created, Biblioscape automatically creates a folder called "attachments" under the database folder. If your database was created by an earlier version of Biblioscape, you can create the "attachment" folder manually. It is recommended that all attachment files are kept under this folder. When adding files under this folder to the Attachment field of a reference, Biblioscape will automatically use the relative path so the links won't be broken when you move a database from one computer to another.

#### Authors

---

(Authors" char: 255) All authors should be listed in the format "Lastname, firstname middlename" (Smith, Keneth D.) and separated by "; ". The following rules about the author name format apply to all 4 data fields treated as author fields. They include: Authors, Sec\_authors, Tert\_authors, and Quat\_authors. These four author fields are labeled differently for each reference

type. To see a complete label list for each reference type, click on the menu command "Tools | Options", then click the "Reference Types" tab.

### General rules

Author and editor names should be entered into Biblioscape in the following format: "Lastname, Firstname Middlename" (leave out the quotes). Individual author should be separated by a "; ". You can enter the first name and middle name in full or as initials. Be sure to type a period followed by a space between initials, otherwise the whole set of initials will be interpreted as the first name. Here are some examples of author names in correct format:

- Smith, K.
- Gibbs, Jay Phillips
- Gibbs, J. P.; Smith, K.

### Using "et al." or other abbreviations

Enter all of the authors for a reference. Biblioscape will take care of truncating the list of authors and adding "et al." if necessary. If you do not know all the author names, put "; et al.," or "; and others," at the end of the list so Biblioscape will treat it as the last name and will not try to parse it. A Biblioscape "Authors" and "Editors" field can only take 255 characters at most. If this is not enough for a particular reference, you can put the rest of the author names in another field, for example, in the "Miscellaneous" field.

### Anonymous works

If a reference has no author, leave the Authors field blank. The output style that you use to generate the bibliography will determine how anonymous references will be treated.

### Corporate Authors

When entering corporate authors, put a comma at the end of the name. Biblioscape will then interpret the whole name as a last name, so it will not be parsed. For example:

- National Health Institute,
- CG Information,
- Department of Chem. University of North Carolina,

### Complex Author Names

For authors with more than one word last names, like "Laurent Duchastel De Montrouge", you need to enter the last name first followed by a comma and the first name. For example: "Duchastel De Montrouge, Laurent". For authors with titles, such as "Jr." or "II", etc., you need to enter the name as "Lastname, Firstname Middlename, Title". For example:

- Smith, John, Jr.
- Gates, W., III

If there is no comma in the name, Biblioscape will interpret the last whole word as the last name, the first whole word as the first name, and the rest as the middle name. For example: "Jay Phillips Gibbs" will be interpreted as "Gibbs, Jay Phillips".

### Enter author names and keywords in Chinese, Japanese, Korean

In the Biblioscape Authors and Keywords fields, each author or keyword is separated from others by "; ". For example: Smith, J. L.; Bowen, J. P.; Collins, F. While entering data in double byte languages like Chinese, Japanese, or Korean (CJK), there are two semicolon letters in the character set, one for English and one for the native language. Biblioscape can only recognize the English semicolon as the separator of authors or keywords. So, before entering the "; ", you have to switch the input language. This can be done with one key. For example, if you use MS PingYing to enter Chinese, once you have finished inputting the first author name, press and release the "Shift" key to go to the English mode. Enter "; ". Press and release the "Shift" key again to go back to Chinese input mode and start entering the second author name. If author names are not separated by an English semicolon, the formatted author names generated by Biblioscape will be in the wrong format. While entering an author name in CJK, you should enter it in the native format. Enter last name first followed by first name. Do not put a comma after the last name as you would do with an English name.

### Author role and comment

Sometimes, you may want to store author role information with an author. For example, actor, actress, and assistant producer can all be considered author roles. In most cases, you don't need to enter an author role. For example, the "Book Edited" reference type has a field called "Editor". You only need to enter the editor's name. Biblioscape will add the "Ed." text if needed according to the style used. But in rare cases, you may want to add author role. For example, if there is a book written by Bill Clinton and Al Gore, you may want to add author role information like this: "<President: > Clinton, Bill; <Vice President: > Gore, Al". Once formatted, the authors will look like: "President: Bill Clinton and Vice President: Al Gore". If you store the author role after the author name, it will appear after the author name in the formatted form. For example, "Clinton, Bill <- President>; Gore, Al <-Vice President>" will become "Bill Clinton - President and Al Gore - Vice President".

Unlike author role, author comment is some text that you want to add with an author but do not want to show in the formatted form. For example, there are 3 authors in the authors field: one is from the Biochemistry department, one is from the Chemistry department, and one is from Pharmacy school. You may want to add it like this: "Hermans, Jan (Biochemistry); Pederson, Lee (Chemistry); Bowen, Phillip (Pharmacy)". Once formatted, the text " (...)" will not be shown in the formatted form.

### Availability

(Availability: char: 12) The ways to access the reference's hard copy. There are several default values to pick from: "In File", "Not In File", "On Request", "In Press", "In Progress", etc. Users can also type other text instead of picking one from the default values. If you want to add or change

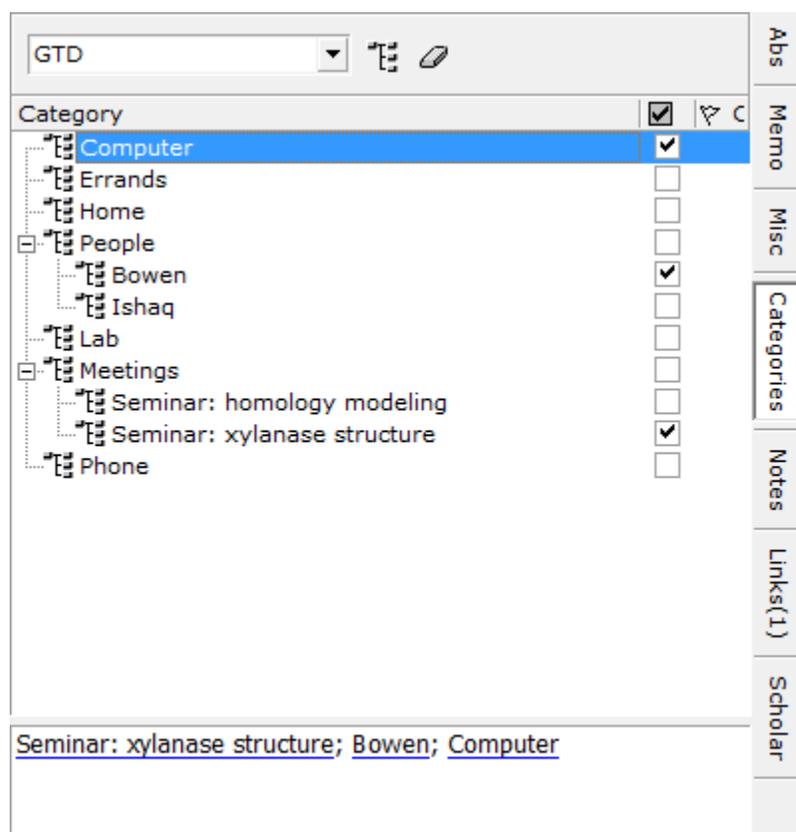
the default values, please double click the file "...\Biblioscape x\Global\bib\_availability.txt". After saving the changes and restarting Biblioscape, the new default values will be added.

### Call Number

(Call\_number: char: 30) The library catalog number of the reference. It can be Library of Congress (LC), Dewey Decimal numbers, or another classification system used by your local library.

### Categories

(Categories: memo: 256MB) A category is a keyword or phrase that helps you to keep track of references so you can easily find, sort, filter, or group them. Use categories to keep track of different types of references that are related but stored in different folders. For example, you can keep track of all the references for the "Chem 102" class when you create a category named "Chem 102" and assign references to it. In the Reference Editor Window, a category tree is displayed on the "Categories" pane. You can add or remove a category by clicking on an item in the categories tree. Or, you can add a new category by typing in the categories box. If there is a space inside a category, for example, "molecular modeling", the space will be replaced by "\_". The category will be stored as "molecular\_modeling".



### Country

---

(Country: char: 30) Name of the country of the principle author. Clicking on the Search button  on the "User Defined" panel of the reference editor will bring up a popup window for you to pick a country that has already been used in your database.

### Created By

---

(Created\_by: char: 30) Name of the user who created the record. This field is automatically stamped by Biblioscape when a new reference is added. When used on a multi-user environment, this field can tell users who created this reference. This also allows users to build searches based on this field.

### Custom 1

---

(Custom\_1: char: 255) Any data that is not suited for another field can be put here.

### Custom 2

---

(Custom\_2: char: 255) Same as "Custom 1".

### Custom 3

---

(Custom\_3: char: 100) Same as "Custom 1".

### Custom 4

---

(Custom\_4: char: 100) Same as "Custom 1".

### Custom 5

---

(Custom\_5: char: 50) Same as "Custom 1".

### Custom 6

---

(Custom\_6: char: 50) Same as "Custom 1".

### Custom 7

---

(Custom\_7: char: 20) Same as "Custom 1".

### Custom 8

---

(Custom\_8: char: 20) Same as "Custom 8".

---

### Custom Date

(Custom\_date: date) This can be used to enter a date that is not covered by other date fields in Biblioscape. For example, if you want to record the date a publication is submitted, you can enter it in this field.

---

### Custom Number

(Custom\_umer: float) For entering an integer or a real number. If you want to sort references based on a number, you can enter it in this field. If you enter a number in a string field, sorting will not work properly.

---

### Database Name

(DB\_name: char: 20) For entering the database name if the reference is downloaded from an online database.

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### Database Provider

(DB\_provider: char: 20) For entering the database provider's name if the reference is downloaded from an online database.

Date (Date\_pub: date) The date that the reference was published. Must have all 3 values: year, month, date, e.g., "8/6/1994". If you have an incomplete date e.g., "May 1994", it should be put into the field "Date\_freeform".

---

### Date Freeform

(Date\_freeform: char: 20) It can take a date in any format, with or without all 3 values. See Year & dates for more. For certain reference types like "Magazine Article", a date is required but it may not have all year, month, and day. For example "May, 1998", or "First Quarter, 2000". In such cases, it should be put into the field "Date\_freeform". If Date\_freeform is not included in the "User Defined" field list, you can always go to the "All Fields" view in the reference editor to access it.

---

### Date Created

(Date\_created: date) The date when a reference was first added into the database. This field is automatically stamped by Biblioscape when a new reference is added. This value is useful in building an "Advanced Search", sorting references, or grouping references.

---

### Date Modified

(Date\_modified: date) The date when a reference was last edited. This field is automatically stamped by Biblioscape when a reference is edited. This value is useful in building "Advanced Search", sorting references, or grouping references.

### Description

---

(Description: char: 150) A brief description of the physical properties of a reference. For example, if it is a "Book", this field can be used to describe the physical condition of the book. You can also use this field to describe other aspects of a reference.

### Document

---

(Ref\_doc: memo: 256MB) For storing the full text of a reference. The document can include formatted text, graphics, or OLE objects. The size limit for a document field is 256 MB, so it should be more than enough in most cases. The OLE support makes it possible to store other types of information, like a chemical structure drawing, a CAD drawing, an Excel spread sheet, etc. In the Reference Editor, click on the "Document" tab, then use the built-in editor to enter whatever you want and format it the way you want to display it. Besides the standard options to change font, size, color, paragraph alignment, etc. you can also change highlight color (background color), superscript, subscript, and even the insertion of a table.

The text, graphics, and OLE are saved into data field Ref\_doc in Rich Text Format (RTF). RTF does not support graphics and OLE efficiently. If the graphics are in high resolution with more than 256 colors, the RTF code could become very large. This will slow down the search index building process. If you need to put lots of high color graphics and OLE objects into the document, we recommend you use Word to save it as a document file on the local disk. Then, enter the full path of the file into the "Attachment" field of the reference, instead of saving high resolution graphics into the Document field.

### DOI

---

(DOI: char: 50) Digital Object Identifier (DOI) is for identifying content objects in the digital environment. If you know a publication's DOI, you can find its meta data as well as the place to obtain its full text.

### Edition

---

(Edition: char: 20) For storing the edition number of a Book, Computer Program, etc.

### Editor

---

(Sec\_authors: char: 255) The editors of a publication. Do not put "ed." etc. in the field, because Biblioscape will add those according for the output style used. Names should be entered in the format "Lastname, firstname middlename" (Smith, Keneth D.) and separated by "; ". See Authors field for more.

---

### End Page

(Page\_end: char: 20) The end page number of a reference when a page range is needed. For example, for Journal Article or Book Section. The End Page should be entered as full. The style used to create the bibliography can change the page numbers to be either full or abbreviated page ranges, or show just the first page. Do not enter commas in the Start Page or End Page for page numbers in the thousands.

---

### Extent of Work

(Extent\_work: char: 20) For storing the extent of work for a reference. For example, the total volume of a book series, or the total number of works in a Music Score.

---

### File As

(File\_as: char: 30) The text that can be used to uniquely identify a reference in a database. The field is automatically stamped by Biblioscape with first author name, publication year, and part of title when a new reference is added. Changes made by users to this field are not saved. The File As field can be used as a temporary citation to uniquely identify a reference.

When formatting a paper, Biblioscape needs a way to uniquely identify a reference. By default, "Reference ID" is used. Using "Reference ID" is fine if all your references are in one database. When you move references from database to database, the "Reference ID" will change for the same reference, so your temporary citation will no longer work in each situation. To overcome this problem, you can use text to uniquely identify a reference. The "File As" field is made to assist you. Instead of typing identifying text into temporary citations, you can just use the content in the the "File As" field instead. To make Biblioscape use the "File As" field instead of "Reference ID" in temporary citations, click the menu command "Tools | Options". Go to "Format Manuscript" tab, check the box Use "File As" instead of "Reference ID" for Temporary Citation.

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### ISBN / ISSN

(Isbn\_issn: char: 20) For storing the ISBN number for a book, or the ISSN number for a journal, magazine, etc.

---

### Journal / Secondary Title

(Sec\_title: char: 255) For storing the secondary title of a reference. Depending on the reference type, it could be: Journal for "Journal Article", Series Title for "Book", Book Title for "Book Section", etc. Since most references in a bibliographic database are of the type "Journal Article", we use "Journal / Secondary Title" for its generic name.

The journal name is entered into the Sec\_title field. When you save a reference, Biblioscape checks if the journal name has been entered before in the current database. If not, the new journal name is automatically added to the journal name list. If the journal name contains periods, the name is automatically placed in the Journal Name Abbreviated column of the journal name table. If the name does not contain periods, it is placed in the Journal Name Full column. The journal name table can be brought up by going to the menu command "Tools | Styles | Journal Name Editor...". The journal name table is used while formatting a paper. If the output style requires the use of an abbreviated journal name, Biblioscape will look up the journal name table and use the Abbreviated Journal Name if it exists. The same is true if a style requires the use of a full journal name. If the abbreviated or full form of a journal name is not found in the journal name table, the journal name entered in that reference will be used instead.

As you save a reference, Biblioscape also puts the journal name into an index table jn\_x which is used to boost searching performance, as well as display a lookup table of journal names and their associated references. This index table of journal names is also used to help maintain data consistency by displaying an existing journal name that best matches the one you are typing.

**Keywords (Keywords: memo: 256 MB)** Keywords of a reference. Individual keywords should be separated by "; ". For example: "Synthesis; HIV; Nucleoside Analogs; Boronic". You can restrict a search to just the Keywords field in "Advanced Search". Each keyword in this field is also entered into an index table so users can browse a lookup list of keywords and their associated references. This index table also helps users enter keyword in a consistent way by suggesting existing keywords while you are typing. Keywords and categories are both used to classify records. When importing references from a citation database on the Web, you should import its keywords to the Keywords field in Biblioscape. The Categories field is filled with categories that are designed by Biblioscape users instead of database providers. The categories are all related to your research activities and needs.

#### Label

---

(Label: char: 60) Text that can help you identify a reference. Some users like to use their own system to identify references for filing purposes. Besides the Label field, Biblioscape includes the following fields for identification purposes: Reference ID; File As; Call Number.

#### Language

---

(Language: char: 30) If you work with references that appear in more than one language, you can use this field to record the original language of publication.

#### Location

---

(Location: char: 150) If you keep your reprints in separate cabinets or folders, you can indicate

that information here. You might also use this field to indicate which library holds a particular book.

### Memo

---

(Notes: memo: 256 MB) For storing your comments, ideas, etc. about a reference. This is a memo field and can hold up to 256 MB of data. When importing references, import filters often map all types of miscellaneous information to this field. Early versions of Biblioscape did not include the Notes module. For later versions of Biblioscape, most users prefer to use the Notes module to store comments and ideas about a reference. The notes module stores each note separately and is better suited for this purpose, so this notes field can be considered a legacy field.

### Miscellaneous

---

(Ref\_misc: memo: 256MB) On occasion, some information that doesn't belong in any of the other fields must be appended to a reference. The Ref\_misc field is designed for this purpose, and can hold up to 256 MB of data per reference.

### Modified By

---

(Modified\_by: char: 30) Name of the user who last modified the reference. This field is only useful when the Biblioscape database is shared by multiple users on one network. Biblioscape automatically stamps this field when a record is changed. The value of this field cannot be modified by the end user.

### Number

---

(Number: char: 20) The issue number of a publication.

### Other Title

---

(Quat\_title: char: 255) For storing any data that is a title in nature. Depending on the reference type, it could be the original title if the reference was first published in a foreign language.

### Original Publication

---

(Original\_pub: char: 255) For entering information about the original publication like publisher, place published, etc. If the original work was published under another title, enter the original title and year to the Reprint Edition field. Because some styles require both the original title, year, and its publisher, and they have to appear in different parts of the formatted references, the original title and its publisher have to be entered into separate fields.

### Place Published

---

(Place\_pub: char: 100) The place where the reference was first published. For example: "Toronto,

Canada".

Priority (Priority: char: 10) You can pick one from the combo box which includes: Low, Normal, and High, and levels 0 to 9, or you can enter anything that will fit into the field.

#### Publisher

---

(Publisher: char: 150) The publisher of the reference. Only some reference types require this field, for example: Book, Audiovisual Material, Computer Program, etc.

#### Reference ID

---

(Ref\_ID: integer) A number that can uniquely identify a reference in a Biblioscape database. This number is handled by Biblioscape internally and can not be changed by the user. Once a reference has been assigned a Ref\_ID, it will never change.

Biblioscape assigns a unique record number to each reference as it is added into your database. These record numbers appear in the temporary citations to ensure that the correct reference is used when the paper is formatted. Here is an example of using Reference ID in a temporary citation: [Smith, K. 1998 #34]

In the references list Window, the "Reference ID" is shown in the preview header panel. You may also include it in the references data grid as one of the columns. This can be accomplished by going to the menu command "View | Current View | Field Chooser", then dragging the "Reference ID" field from the Field Chooser Window to the data grid column header. In the reference editor Window, you can show the "Reference ID" in the "User Defined" panel by clicking on the splitter bar.

Because the "Reference ID" is used to uniquely identify a record during the formatting of a paper, you need to know the following facts about it:

- It is recommend that you do not "Reference ID" as a means of filing or numbering your office reprints, because you have no control over this number, and it is subject to change when records are moved into another database. Instead, enter your own unique number into the Label field, or the "Accession Number" field, and use that number for your reprints.
- Biblioscape automatically assigns a record number sequentially to each reference as it is added to the database.
- If the same reference appears in two different databases, their "Reference ID" will be different.
- The "Reference ID" is never reused or reassigned within a database. Even if you permanently delete a reference, that ID number is never used again in that database.
- You cannot modify or reassign record numbers.
- If references are not sorted by any other field, they are displayed in descending order based on

Reference ID number.

### Deleting references in the database

If you delete a reference from your database, Biblioscape will put that record into the recycle bin. If you restore that reference from the recycle bin back to the database again, it will have the same Reference ID number. But, if you delete that reference from the recycle bin, that record will be permanently deleted from your database. After that, even you typed that record back into the database, another Reference ID will be used.

### Uniquely identify a reference in temporary citations

When inserting a temporary citation, Biblioscape needs to uniquely identify that reference. The Reference ID is used by default. This won't be a problem if you always use one database. If you have one database on your home computer and keep another one on your work computer, the same record will have different Reference IDs on the two databases. Therefore, documents with temporary citations from one computer cannot be correctly formatted using the database on another computer. That is why we recommend using natural citation instead of the Reference ID in your temporary citations if you have more than one database.

### Reference Mark

---

(Ref\_mark: char: 1) For storing a single character to flag a reference. A reference can be marked in 8 colors for all kinds of purposes.

### Reference Read

---

(Ref\_read: char: 1) For storing a single character to identify if a reference has been read by the user. When you import a large number of references in a batch, all of them are designated as Unread. Once an Unread reference has been shown in the reference editor or preview window, the reference's Unread status is changed to Read.

### Reference Type

---

(Ref\_type: char: 30) Biblioscape has about 30 pre-defined Reference Types. Each reference type has a set of associated data fields. The reference type determines how a reference is going to be formatted in the bibliography.

When adding a reference, the new record is assigned the same reference type as the last selected reference. If you want to change to a different type of reference, click the Reference Type entry at the top of the field list, and select the reference type that you need. You should select the reference type before entering data into other fields because each reference type has its associated data fields. Only data fields associated with the current reference type are shown in the "User Defined" panel, and the field labels change accordingly. However, you can change the

reference type at any time, and the information you have entered is retained and transferred to the corresponding field of the new reference type. Besides determining which data fields are shown and what their labels are, reference type also determines how the reference is going to be formatted in the citations and bibliography.

Biblioscope has about 30 pre-defined reference types which should be enough for most users. A reference type can be easily customized, and you can also create new reference types. Before doing so, you should study existing reference types carefully to see if they can accommodate your references. Here are a few tips about choosing the right reference type.

- Use Book for books written by one or more authors, and use Book Edited for books edited by one or more editors (whether they are books in a series or not).
- Use Book Section for references that are part of an edited or non-edited book. An example would include a book chapter or a single article in published conference proceedings.
- The reference type Electronic Source should be used for a Web page or ftp site. Email discussions should be cited as Personal Communications, just like any other correspondence.

#### **Customize reference types**

Click the menu command "Tools | Options" and select the "Reference Types" tab. You can then click the "New" button to add a reference type. To change the field label for a reference type, select the cell corresponding to a data field and a reference type. Change the label to anything you like. If you leave it blank, that field will not be shown in the "User Defined" tab when the reference is of the selected type.

Reprint Edition (Reprint: char: 150) If the work was originally published under a different title, put the original title and year under the Reprint Edition field. You can enter the original publisher and place published in the Original Publication field. Because some styles require both the original title, year, and publisher, and they have to appear in different parts of the formatted references, the original title and its publisher have to be entered into separate fields.

#### **Section**

---

(Section: char: 20) Identifies a part of a publication. Needed for certain reference types like Newspaper Article, Statute, Bill, etc.

Series Editor (Tert\_authors: char: 255) The series editors of a publication. Do not put "ed." etc. in the field, because Biblioscope will add those according to the output style used. Names should be entered in the format: "Lastname, firstname middlename" (Smith, Keneth D.) and separated by "; ". See the Authors field for more.

#### **Series Title**

---

(Tert\_title: char: 255) Series title of a reference. You should enter the series title in the same way you would like it to be capitalized in your bibliographies. See the Title field for more.

---

### Short Title

---

(Title\_short: char: 100) The abbreviated version of the regular title. In many humanities styles, a short title is used in the citations and footnotes to identify which reference is being cited. For example, MLA style requires that a short title be added to the in-text citation to identify works by the same author. A regular in-text citation in MLA requires only the author name and cited page, like (Smith 278). But, if there are multiple works by that author, MLA requires that the title, or a shortened form of it be added to the citation. If the regular title is long, like "Exploring All Possibilities in Your Life - The Yates Isaccson Story", you should enter a short form of the title that starts with the first word. For example: (Smith, Exploring 278).

---

### Start Page

---

(Page\_start: char: 20) The start page number of a reference. If you only have one page number for a reference, put it into the Page\_start field. Do not enter commas in the Start Page or End Page for page numbers in the thousands.

---

### Subject

---

(Subject: char: 100) The Subject field is for storing subject information when you import references from other sources. In a library catalog or online bibliographic database, many reference records have a subject field. When designing an import filter, you can map that field to the subject field in Biblioscape. When you organize references in Biblioscape, we don't recommend using the subject field. Instead, you should use the Categories field. The data subject field is treated as a whole when in reference lookup. For example, you may have "Computational Chemistry; NMR" in the subject field. In the reference lookup display of the subject field, "Computational Chemistry; NMR" will be listed as an entry instead of being listed separately. If you want terms separated by "; " in the lookup list, please use the Keywords field or the Categories field.

In the Reference Editor Window, if you are in the Subject field on the "User Defined" panel, clicking on the Search button at the end of the field will bring up a lookup window where all subjects used are listed. You can then pick one. If there is more than one subject in this field, separate them with "; ", but data in this field will not be treated as separate terms in the lookup list as explained above.

---

### Title

---

(Title: char: 255) Title of a reference. You should enter the title in the same way you would like it to be capitalized in your bibliographies. The following rules apply to all four title fields in Biblioscape. They are: Title, Sec\_title, Tert\_title, and Quat\_title.

- Enter titles without a period or any other punctuation at the end. This should be left for the

Output Style to add if needed. This does not apply to the abbreviated journal name for Sec\_title.

- Title field can take up to 255 characters. This limit can be removed if the field type is changed to "memo" with Restructure utility.
- Although the Biblioscape styles can change the capitalization of titles, it is best to capitalize the title in the same way you would like it to be capitalized in your bibliographies. Because there are many exceptions for capitalization, this task is best done by a human instead of a computer.

#### Translator

---

(Quat\_authors: char: 255) This field is designed to store a person's name. It could be a translator, performer, etc. depending on the reference type. All names are parsed and indexed in the au\_x table. See the Authors field for more.

#### Type of Work

---

(Type\_work: char: 100): Some reference types require you to specify the Type of Work. For example, you can put "Oil Painting" as the Type of Work for the reference type "Artwork".

#### URL

---

(Url: char: 255) If a reference has a corresponding entry somewhere on the Internet, you can enter that URL location in this field. Later, you can use Launch URL by clicking the Web link button; Biblioscape will take you to that location. Be sure to enter a complete URL.

#### Volume

---

(Volume: char: 20) The volume number in which a reference appeared.

#### Web Post Hide

---

(Web\_post\_hide: char: 1) Indicates whether to show or hide certain fields when the Biblioscape database is posted on the Web by the BiblioWeb server. The fields to be hidden can be selected by going to the menu command "Tools | Options", then selecting the "Others" tab. It only applies to the reference record display form, not the edit form.

#### Work Reviewed

---

(Work\_reviewed: char: 100) For entering works reviewed by a reference. Reference types like Journal Article, Magazine Article, Newspaper Article, and Book Chapter can be a review of books, computer programs, films and so on. You can enter the name and author of a work being reviewed into this field.

#### Year

---

(Year\_pub: integer) The year a reference was published. If you need to enter a publication date for

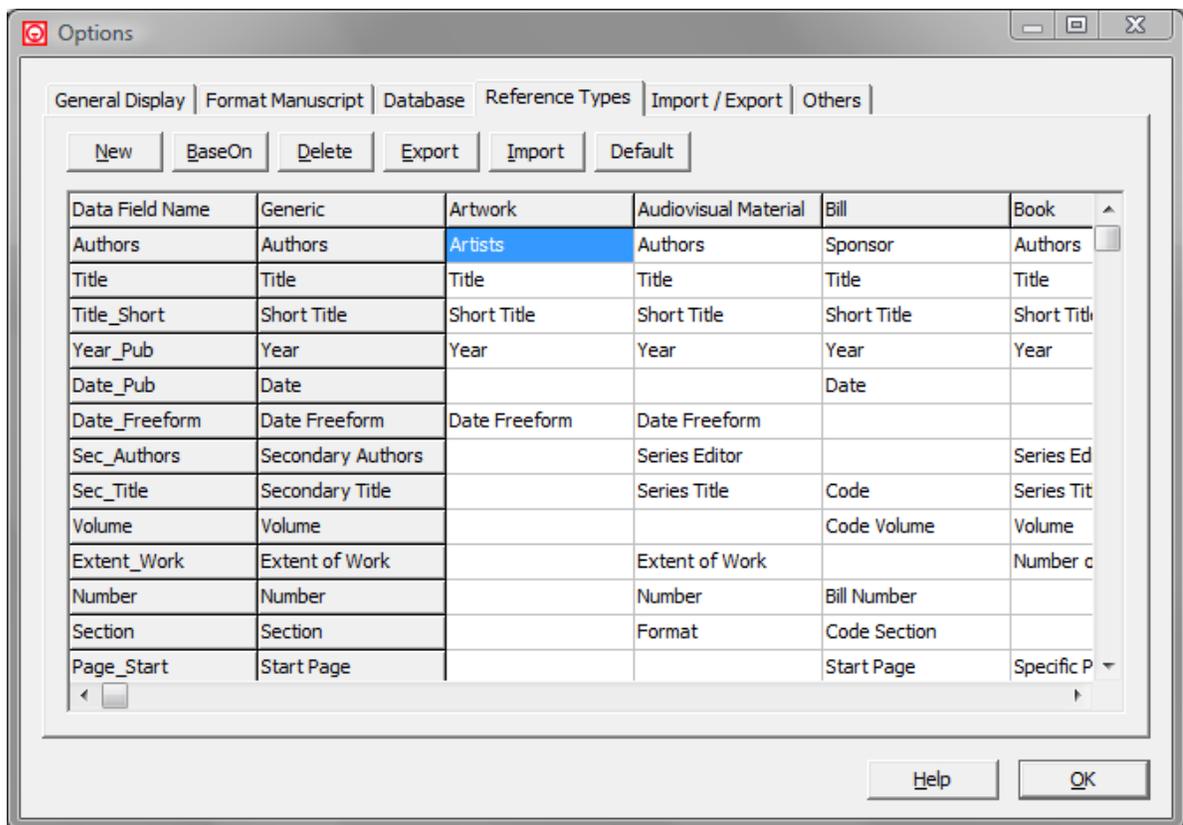
a reference like a newspaper article, you don't need to enter the Year, it will be automatically added by Biblioscape according to the value in Date\_pub. You should always enter 4 digit numbers for the year field. The year field only takes integers. If the reference is not published yet, you should put "in press" or "in preparation" in the other data field "Date Freeform", which can take both numbers and text.

In the style editor window for Year, there is an option to "Use Date Freeform when Year is empty". When this box is checked, Biblioscape will use "Data Freeform" when the Year field is empty. Instead of leaving the Year empty, it will put "In Press", etc. depending on what you put in the "Date Freeform" field for that record.

#### 4.5.4 Reference types

Biblioscape currently includes 27 built-in reference types. In addition to those that are built-in, you can also create your own reference types. Before you create your own reference types, you should first give some thought as to whether existing ones could serve you adequately. There are some drawbacks in creating new reference types. For one thing, each time you add a new reference type, you will have to create a corresponding style template for it, unless you are willing to let Biblioscape use the default style. And, each new reference type you create results in an increased possibility that you or one of your colleagues will enter data inconsistently from one reference to the next. Still, if you do have the need for new reference types to accommodate your data, feel free to do so.

Each reference type requires a different set of data fields. You can customize which data fields should be associated with a certain reference type. In the reference editor "User Defined" view, only those data fields are displayed. To customize a reference or add a new one, click "Tools | Options".



*Customize Biblioscape reference types*

The first column lists all the data field names in the reference table. The second column lists the generic names of the data fields. The reference type "Generic" cannot be customized. If you have a record that won't fit into an existing type and is not warranted for a new type, you can assign it to type "Generic". You can customize all the reference types starting from the third column. The field labels used for each reference type can be very different. For example, the "Authors" field is called "Artists" for the reference type "Artwork" and called "Sponsor" for the reference type "Bill". The meaning of each data field is explained in the section reference data fields. If a cell is left blank, it means the data field is not relevant for that specific reference type. For example, the field "Page\_Start" is left blank for reference type "Artwork" because artwork is not an article; it has no need for this page field. When you enter data for this type of reference, the "Page\_Start" field will not be shown in the "User Defined" pane. Here is the list of all the included reference types.

- **Artwork:** This is a loosely defined reference type. Any work done by an artist can be classified as Artwork. It can be a painting, a sculpture, handcraft, etc.
- **Audiovisual Material:** Audio cassette, CD-Rom, record, slide, negatives, prints, overheads, etc.
- **Bill:** A draft of a proposed law presented for approval to a legislative body or the law

enacted from such a draft.

- **Book:** Also includes: Whole Book; Monograph; Pamphlet, etc.
- **Book Edited:** Any book with an editor, usually in a series.
- **Book Section:** Also called Book Chapter. Any section of a book.
- **Case:** Any legal case.
- **Computer Program:** Any computer program, including shareware, and freeware.
- **Conference Proceedings:** Proceedings published after a conference.
- **Document:** Usually a computer document with formatted text in the Document field. Could be a paper based document as well.
- **Electronic Source:** A very general type for any computer related data. Could be a file, a Web site, a ftp site, email address, etc.
- **Film or Broadcast:** A movie, TV show, or broadcast program.
- **Generic:** Any data type that won't fit into an existing type, and not warranted for a new type. The field labels for the Generic type can't be customized.
- **Hearing:** A public investigation conducted by a legislative branch.
- **Journal Article:** Any research article, review, or communication published by a scientific journal.
- **Magazine Article:** Articles published in a magazine.
- **Manuscript:** Any work in the process of publication. Could be a book, an article, a review, etc.
- **Map:** Any type of map.
- **Music Score:** Music composition, published or non-published.
- **Newspaper Article:** Articles, editorials, or anything else published on a newspaper.
- **Note:** A research note, an idea, or any free form text that may be referenced later.
- **Patent:** Patent formats may be different from one country to another. Questionable text can be put into the miscellaneous field.
- **Personal Communication:** Personal communications between researchers that may be used as a reference.

- **Report:** Reports issued by an organization, company, government, etc.
- **Serial:** Any publication published periodically, such as a journal, magazine, newspaper, etc. Serial is added mainly for cataloguing in the Library module.
- **Statute:** An established law or rule.
- **Thesis:** Dissertation by a Ph.D. or Master student.

## 4.6 Importing and exporting references

Biblioscape can import references from many different sources and formats. You no longer need to type in reference records. The easiest way to build up your reference collection is to capture search results from Web based bibliographic databases. Biblioscape users can search a Web based bibliographic database using the reference Online Search or using the built-in browser. Search results can be captured directly into the reference database with the right import filter.

Biblioscape can import references saved as a text file from a CD-ROM, Email, library catalog, etc. You can build a new import filter if there are no existing ones available. Detailed tutorials are available for importing and exporting files to and from all major competing products. Biblioscape can import references from the following programs: EndNote, Reference Manager, ProCite, Citation, Papyrus, Bibliographica, spreadsheet or database programs, etc. Biblioscape also lets you import records as comma or tab delimited files.

There are several ways to export references. You can export records as plain text file, so you can later import the records into other bibliographic software. You can also use any of the Biblioscape output styles to export records in RTF or HTML format. There are thousands of output styles pre-made in Biblioscape. and users can also create new output styles if the existing ones do not satisfy their needs. The export wizard is available if you need to export references as a delimited file, spreadsheet, or popular database tables.

### 4.6.1 Importing references

Biblioscape can import bibliographic records from any software program as long as the bibliographic records can be exported in a tagged format. Detailed step-by-step instructions are available for popular bibliographic software like EndNote, RefWorks, Reference Manager, etc. With the import wizard, Biblioscape can even import directly from database and spreadsheet programs. We provide many import filters for popular programs. You can create your own import filter if needed. An exciting new feature has been added in Biblioscape to import formatted references. If you have a collection of formatted references in a word processor file, this new feature will save you lots of time.

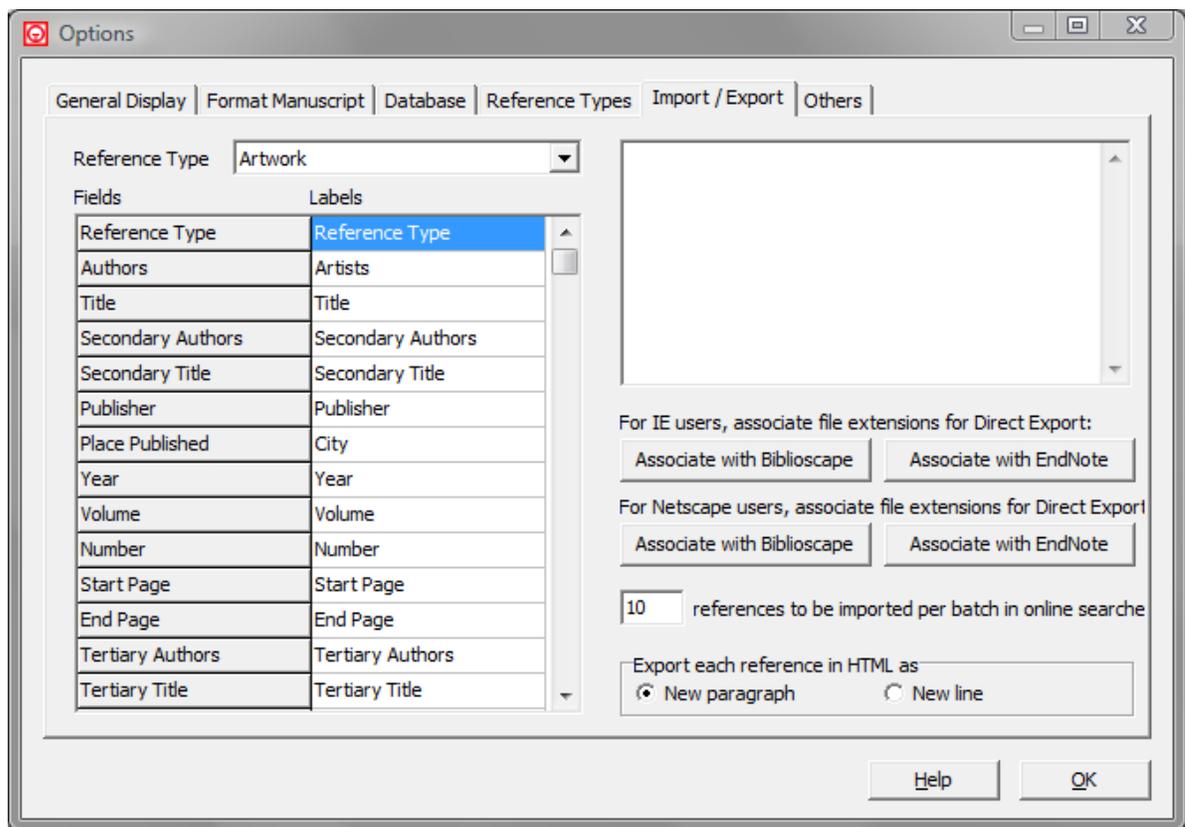
#### 4.6.1.1 Import from the Web with Direct Export

The place you are most likely to import references from is an online bibliographic database. There are more and more bibliographic databases becoming freely available on the Web. If you are a university student or faculty member, you will have access to many proprietary bibliographic databases on the Web. The easiest way to import online bibliographic records into Bibloscope is through "Direct Export". It is supported by many online databases. After finishing your search, select the references you want to save. Click the "Direct Export" button or hyperlink. The selected references will be automatically imported into your bibliographic software.

"Direct Export" is a way to transfer bibliography records in a file through your web browser and trigger an import operation automatically. It is widely supported by EndNote, Reference Manager, and ProCite. Bibloscope supports Direct Export as well.

#### Add Direct Export support in IE

Adding Direct Export support in IE is easy. In Bibloscope, go to "Tools | Options". Click the button "Associate with Bibloscope" under the label "For IE users, ...". If you decide not to use Bibloscope after evaluation, you can associate Direct Export back to EndNote by clicking "Associate with EndNote".



### Add Direct Export support in FireFox

Adding Direct Export support in FireFox takes more steps. First, you need to do the same things that are required for IE. That is, to go "Tools | Options" window "Import/Export" tab in Biblioscape. Click the button "Associate with Biblioscape" under both "For IE users, ..." and "For Netscape users, ...". Next, click a Direct Export link to configure and test it. You can go to <http://www.bmj.com> and do a search. Select a couple of records, check the radio button "download to citation manager" and click the "Go" button on the left.

The screenshot shows the BMJ website interface. At the top, there is a search bar and navigation links for BMJ, BMJ Journals, BMJ Careers, BMJ Learning, BMJ Evidence Centre, and BMJ GROUP. Below this is the BMJ logo and the tagline "medical publication of the year". A navigation menu includes Home, Research (FREE), Education, News, Comment, Topics, Archive, and About BMJ. The main content area displays search results for "ford" (anywhere in article). It shows "Results 1-10 (of 601 found)" and a "Next 10" link. The search criteria are "ford (anywhere in article)". There are options to "Alert me when new articles matching this", "Save this search to my folders", and "Download all citations on this page to my". Below this, there are radio buttons for "view abstracts in new window" and "download to citation manager", with the latter selected. Two search results are shown, each with a BMJ logo and a checkmark. The first result is for "OBITUARIES: Jean-Claude Gazet Hubert Talbot ('Joe') Ford" with a date of Feb 2004. The second result is for "OBITUARIES: C H Oliver Andrew Rutherford ('Ford') Simpson" with a date of Oct 2002. A callout bubble points to the "download to citation manager" radio button with the text: "Check the radio button 'download to citation manager' and click 'Go' on the left".

In the next screen, click the link "Download All Selected Citations to Citation Manager".

Home > Selected Abstracts

## Selected Abstracts

Returned: 2 citations and abstracts.

Click on down arrow or scroll to see abstracts.

[▶ Download ALL Selected Citations to Citation Manager](#)

[+](#) **Hubert Talbot ("Joe") Ford**  
Jean-Claude Gazet  
BMJ 2004;328:408, doi: 10.1136/bmj.328.7436.408

[+](#) **Andrew Rutherford ("Ford") Simpson**  
C H Oliver  
BMJ 2002;325:972, doi: 10.1136/bmj.325.7370.972f

Abstract 1 of 2 [+](#)

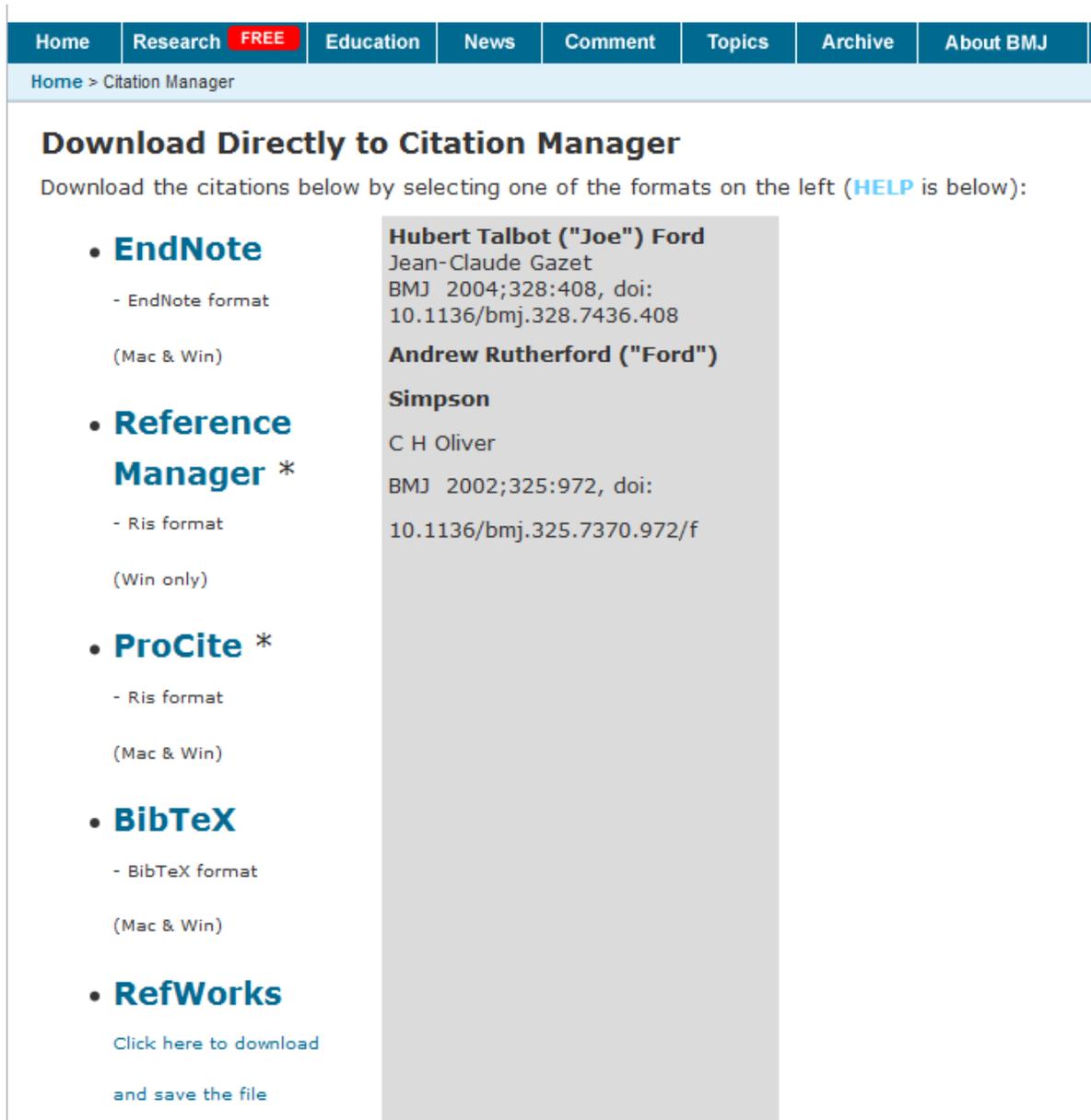
What's New

- Last
- Past
- Curre
- Rapi

Latest

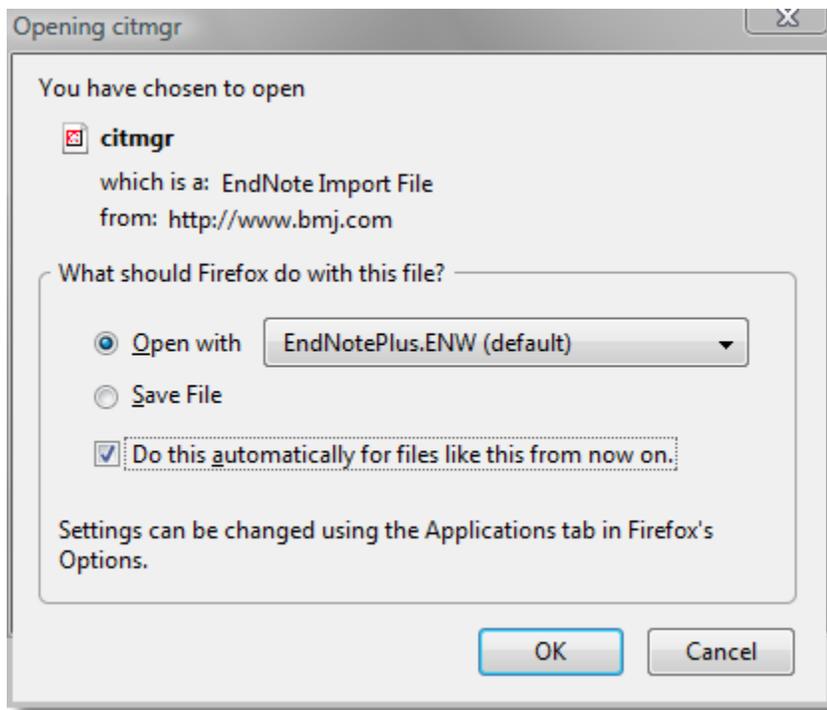
- Priori
- BMJ i
- Susta
- Onlin
- Writi

You will be prompted to select which program you want to import the records into. Click "EndNote".



The screenshot shows a web interface for Citation Manager. At the top, there is a navigation bar with links: Home, Research (with a 'FREE' badge), Education, News, Comment, Topics, Archive, and About BMJ. Below the navigation bar, the breadcrumb 'Home > Citation Manager' is visible. The main heading is 'Download Directly to Citation Manager'. Below this, a text instruction reads: 'Download the citations below by selecting one of the formats on the left (HELP is below):'. On the left side, there are five bullet points representing different citation formats: EndNote, Reference Manager \*, ProCite \*, BibTeX, and RefWorks. Each format includes a brief description (e.g., '- EndNote format'), supported operating systems (e.g., '(Mac & Win)'), and a link to download. On the right side, two references are listed in a grey-shaded box. The first reference is by Hubert Talbot ("Joe") Ford, with author Jean-Claude Gazet, BMJ 2004;328:408, and doi: 10.1136/bmj.328.7436.408. The second reference is by Andrew Rutherford ("Ford") Simpson, with author C H Oliver, BMJ 2002;325:972, and doi: 10.1136/bmj.325.7370.972/f.

You will be prompted with the following window. Click "OK". Your references in BMJ will be automatically imported into Bioscape. If you don't want to be prompted by this window again next time you do Direct Export, check the box "Do this automatically for files like this from now on".

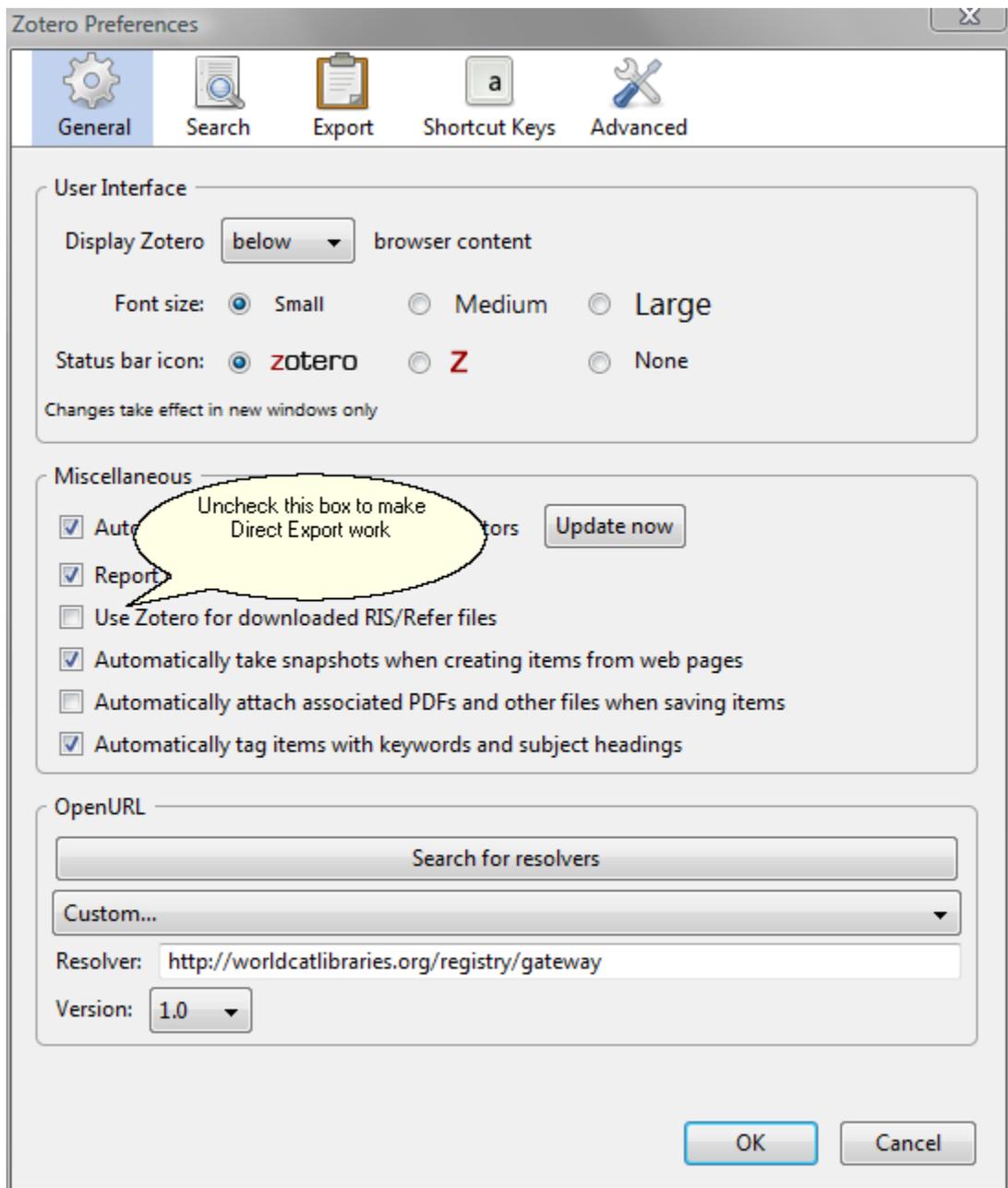


### Use Direct Export

Direct Export is supported by many bibliographic database web sites including EBSCO, ERIC, Elsevier, OVID, OCLC, etc. Northwestern university library has a web site listing detailed steps on how to use Direct Export for many well known sites. The EndNote web page also lists all major citation database web sites supporting Direct Export, as well as a brief instruction for each site.

#### **Tip: Direct Export and Zotero**

Zotero is a Web browser FireFox based reference manager. If you have Zotero installed, Direct Export will not work by default, because Zotero will intercept the download file and import the references into Zotero instead. To make Direct Export work, you have to either disable Zotero or turn off this feature in Zotero. To disable Zotero, go to "Tools | Add-ons" in FireFox. Select Zotero and click the button "Disable". If you still want to use Zotero, you can click the "Options" button. On the "General" tab, uncheck the box "Use Zotero for downloaded RIS/Refer files". Click OK button. You need to restart your FireFox browser for this new setting to work.



### Import from the Web without Direct Export

There are still many web sites that don't support Direct Export. You have to display the search result in a tag format. Then, go to "File | Save As..." in your web browser and save the page as a plain text file. Next, you can go to "File | Import" in Biblioscape and pick the right import filter for the file. For those sites that don't support "Direct Export", you can also use the Biblioscape integrated web browser to do the search. After displaying the results in the specified format, click on the "Capture References" button. You can then chose the import folder, make sure the correct

import filter is selected, and click the Start button to finish the import.

#### Import files with extension: brf, enw, ris, and ciw

Once you have chosen to add Direct Export support in Bibloscape, you can import Refer files, RIS files, and Ovid export files directly into Bibloscape. All refer files that end with \*.brf will be associated with Bibloscape. You can double click this file, and it will be automatically imported into Bibloscape. Your EndNote export file that ends with \*.enw, Reference Manager export file that ends with \*.ris, and Ovid export file that ends with \*.ciw will also be associated with Bibloscape. You can double click those files. Bibloscape will automatically import those files with the correct import filter.

#### 4.6.1.2 Import from disk based commercial citation databases

Some citation databases from commercial providers are delivered on a CD or DVD disk. You have to load the disk onto your library PC and run their search software. There are usually options to export your search results in several formats including EndNote Refer and Reference Manager RIS. Some databases only allow you to export in their own format. Bibloscape provides many import filters for such cases. You can go to "File | Import Filters..." in Bibloscape and browse the import filters list. Import filters are named with the provider's name at the beginning followed by the database name. For example: "SilverPlatter WinSPIRS -- EMBASE". A sample record is given for each import filter. You can compare how well it matches the file you want to import.

#### 4.6.1.3 Import formatted references in a bibliography

In the past, Bibloscape could only import references in a tagged format. For example:

Authors: Kowal, D.

Title: Nature and causes of injuries on women resulting from an endurance training pr

Journal: American Journal of Sports Medicine

Volume: 8

Issue: 4

Pages: 265-269

This works fine when you import references from a citation database or from another bibliographic software. For a lot researchers, their reference collection is saved in a word processor document and the references are not in a tagged format. Instead, their references are saved in a formatted style like APA, MLA, Chicago, or in a style required by a journal. It is possible that the references are copied and pasted from many sources, therefore there are many styles in a reference collection. This has been a tough problem to tackle for bibliographic software. Users had to enter their references manually by copy and paste.

Bibloscape has introduced a new feature to solve this tough problem. You can now import references in a formatted style. You can have references formatted in different styles like APA,

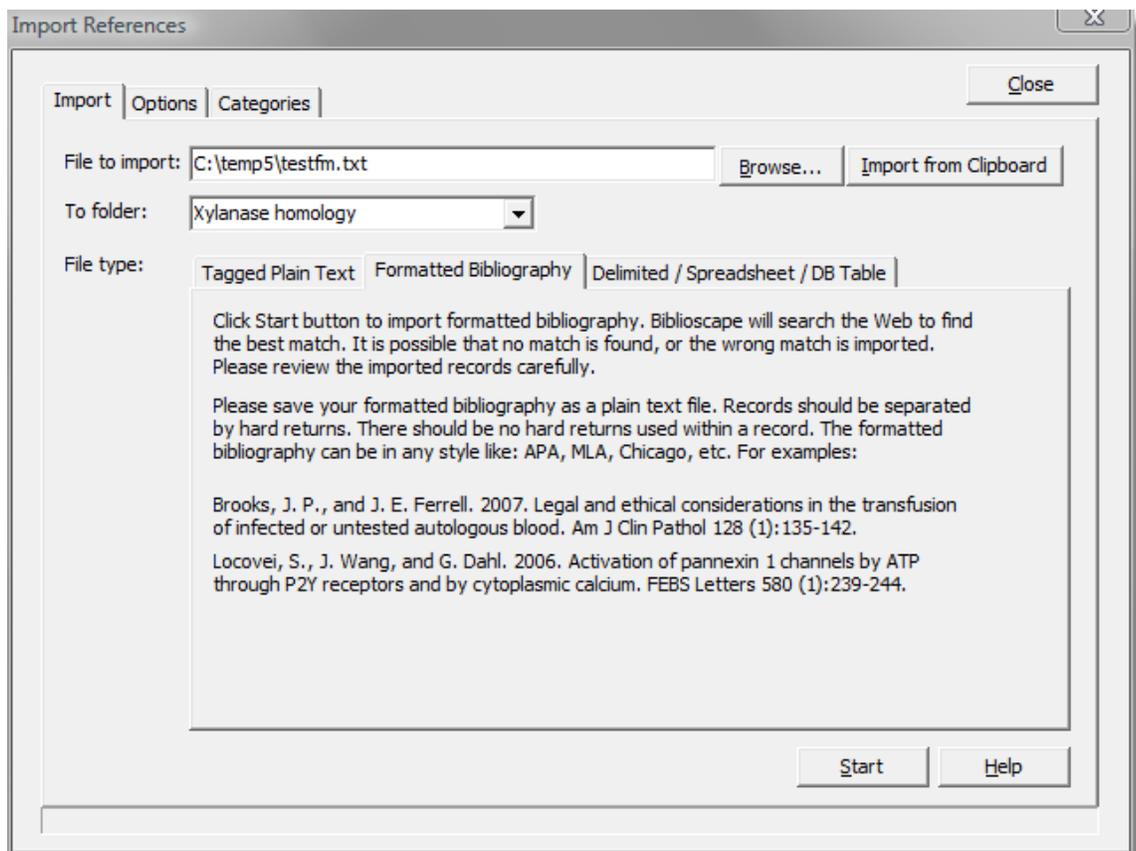
MLA, and Chicago in a single file, and have different types of references like journal article, book, and conference paper in a single file. Bibioscape will use the Internet to look for your references and import them. If the full text of a reference is available on the Web, Bibioscape will include the link to the full text.

1. Open the file of your reference collection in a word processor. Make sure each reference is in a single line. There is no line break inside a reference.

Kowal, D. (1980). Nature and causes of injuries on women resulting from an endurance training program. *American Journal of Sports Medicine*, 8(4), 265-269.

Ainslie, George and Monterosso, John (2002). Hyperbolic discounting lets empathy be a motivated process. *Behavioral and Brain Sciences*, 25, 20-21.

2. Save the file under another name as a plain text file. This is very important. Bibioscape can only import a file in plain text format.
3. In Bibioscape, select the reference folder where you want to import the file. Go to "File | Import...".



4. Click the "Browse..." button and select the plain text file you want to import.

5. Click the "Formatted Bibliography" tab next to the label "File type:".
6. Click the "Start" button to import.

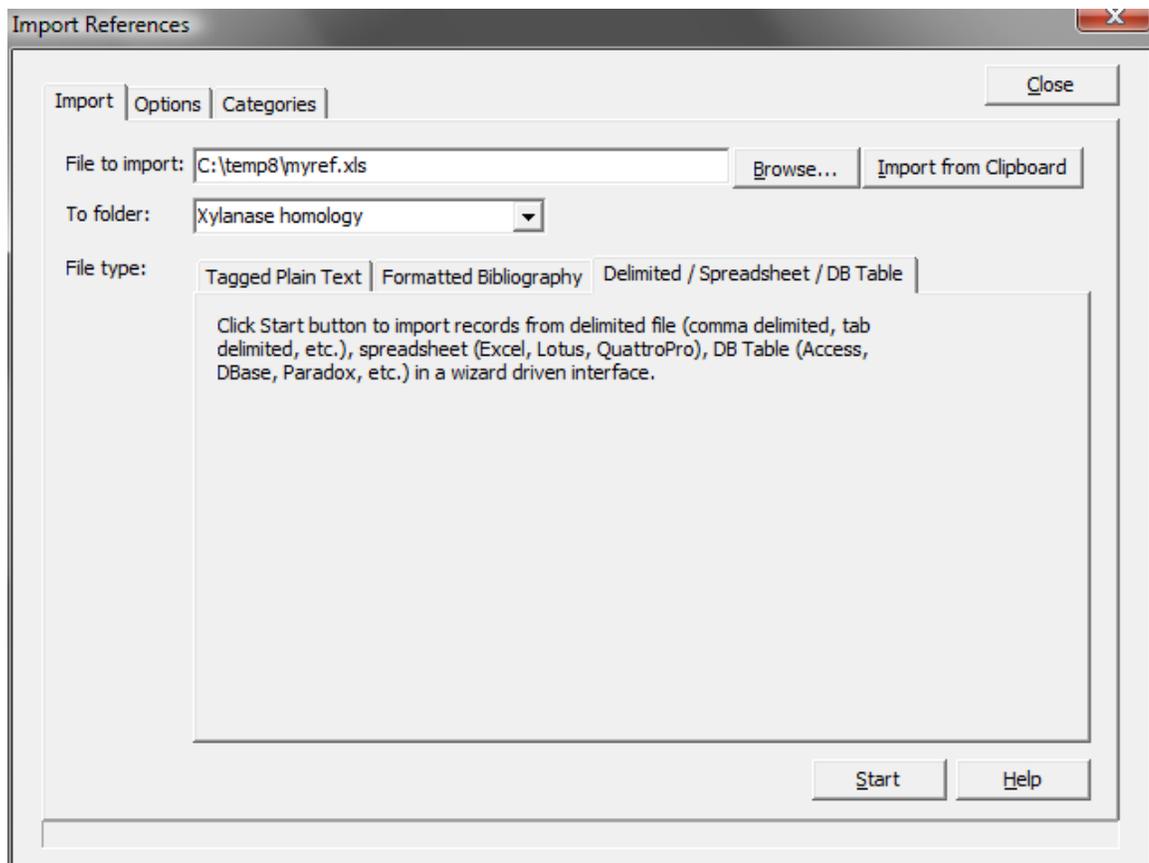
**Note**

When importing a tagged file, all the data is included in the file. When importing formatted references, Biblioscape must look for the record on the Internet. It is possible that Biblioscape cannot find certain references, or the wrong references are imported. Due to the nature of this import, it is possible some records are not imported and some wrong records are imported. After the import you need to go through your imported records and compare them to the original ones in your file. This step could be time consuming. Because formatted references could not be imported in the past, this new feature still will save you a lot of time.

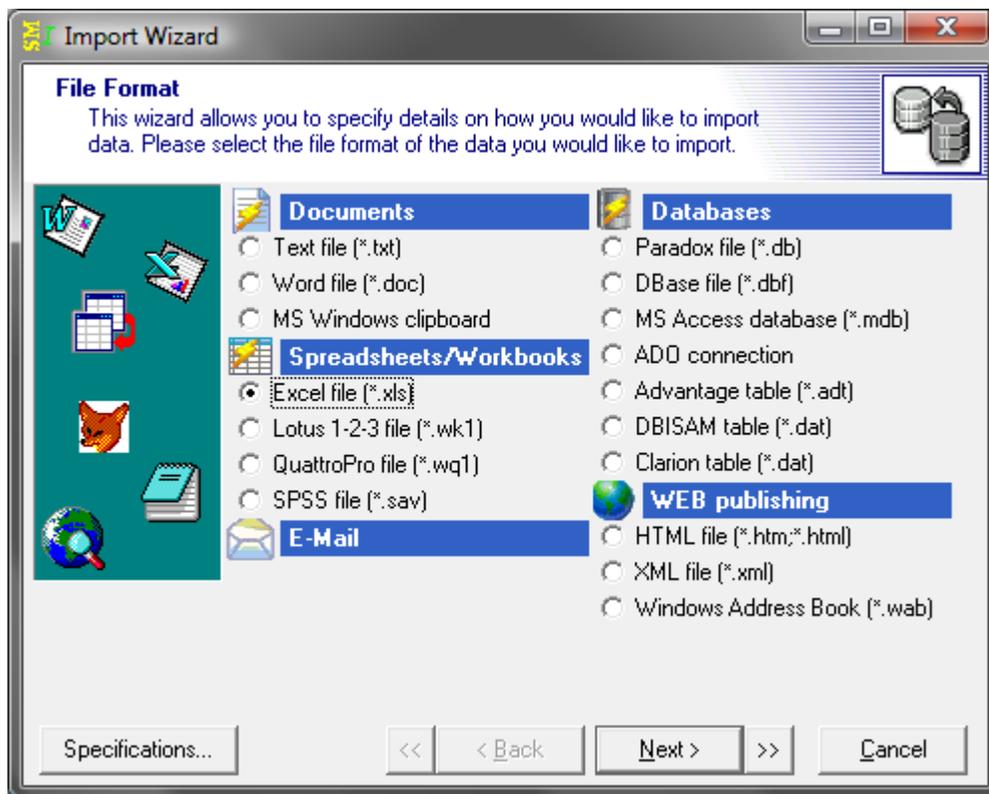
**4.6.1.4 Import from a delimited file, a spreadsheet, a database table**

If you keep your references collection in a spreadsheet program like Excel, Quadro Pro, Lotus 123, or in a desktop database program such as Access, Paradox, etc., you can import your references into a Biblioscape database easily by using an import wizard. If your references are stored in other desktop database programs like File Maker Pro, or a database server like Oracle, Sybase, Microsoft SQL Server, etc., you can first export your references as an Excel file, an Access database, or a comma/tab delimited file, and then import the file into Biblioscape using the import wizard. The import wizard has a similar interface for different file formats, and we will use a Microsoft Excel file as an example to show the import process step by step.

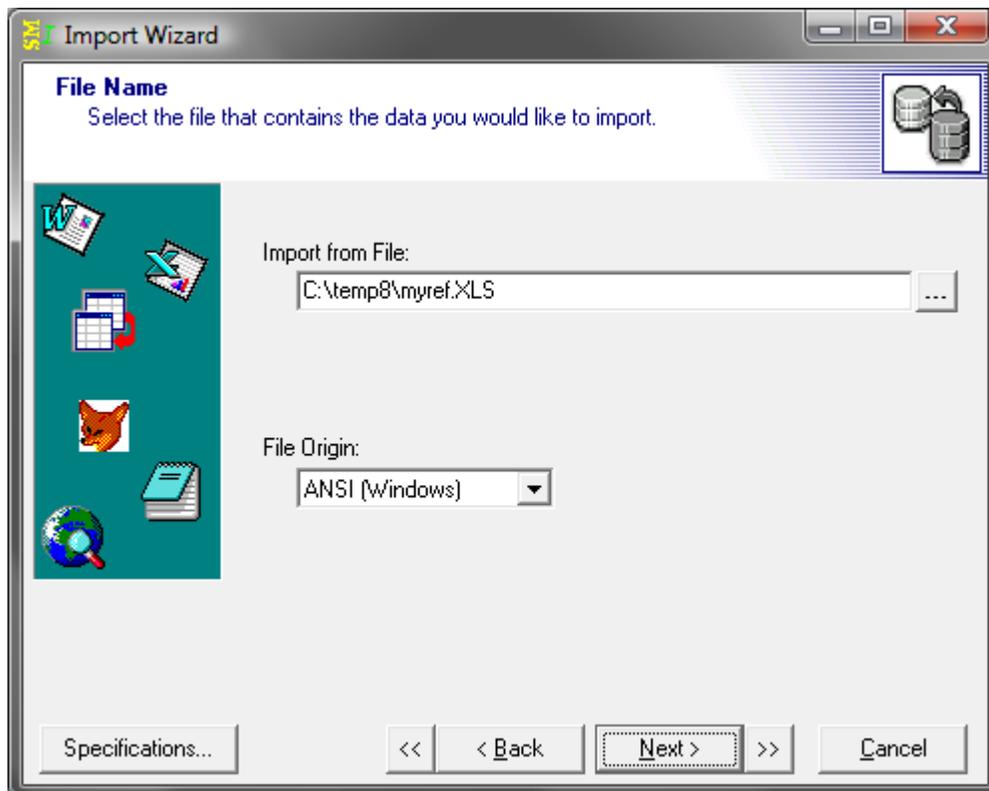
1. In Biblioscape, select the references folder where you want to import the records, and click "File | Import...".
2. In the import window, click "Browse..." to select the import file.



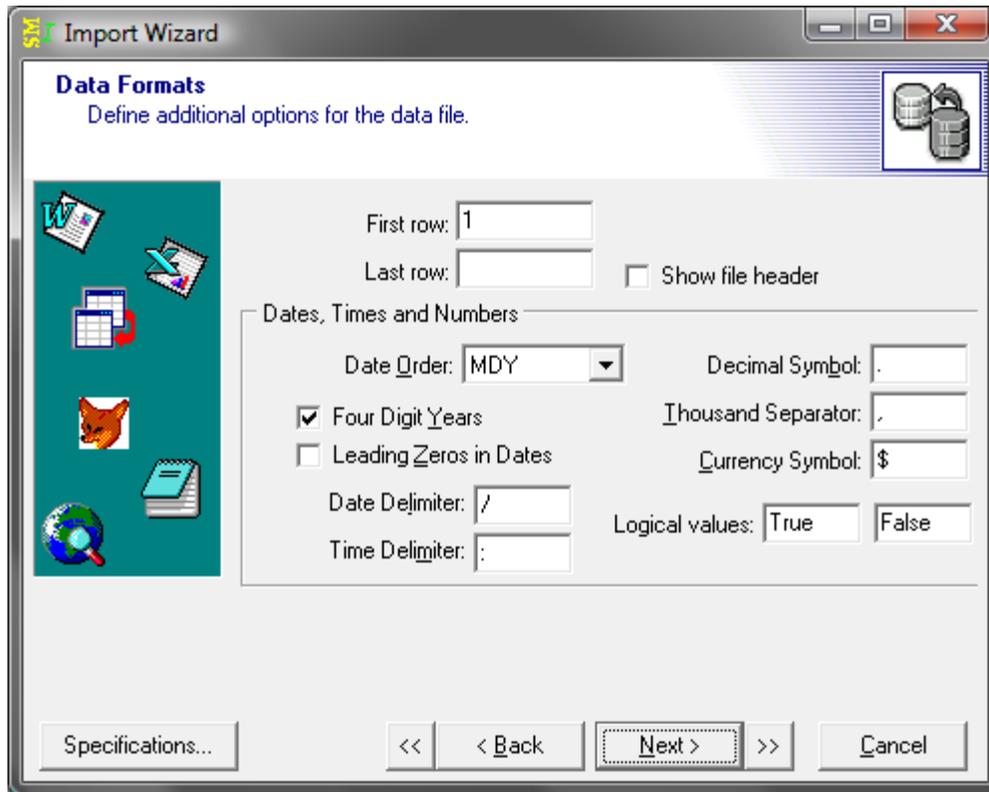
3. Select the "Delimited / Spreadsheet / DB Table" tab, and click the "Start" button to run the wizard.
4. Under the "Spreadsheets/Workbooks" section, select "Excel file (\*.xls)" and click "Next".



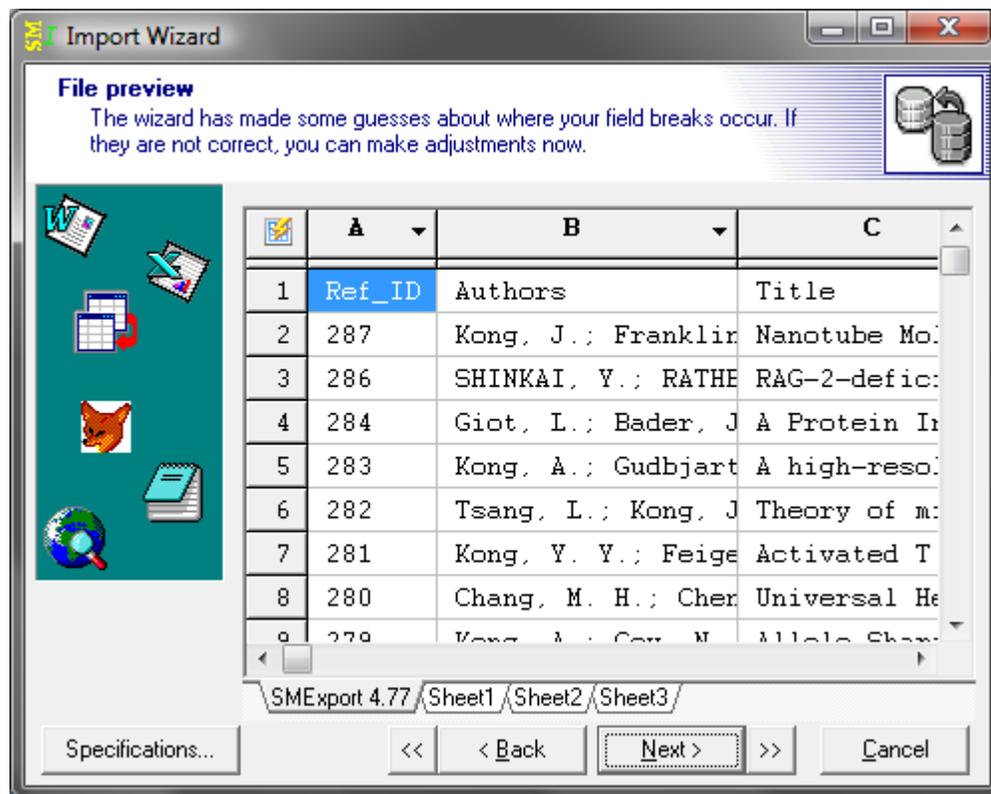
5. In the second step, you do not need to change any settings. Click the "Next" button.



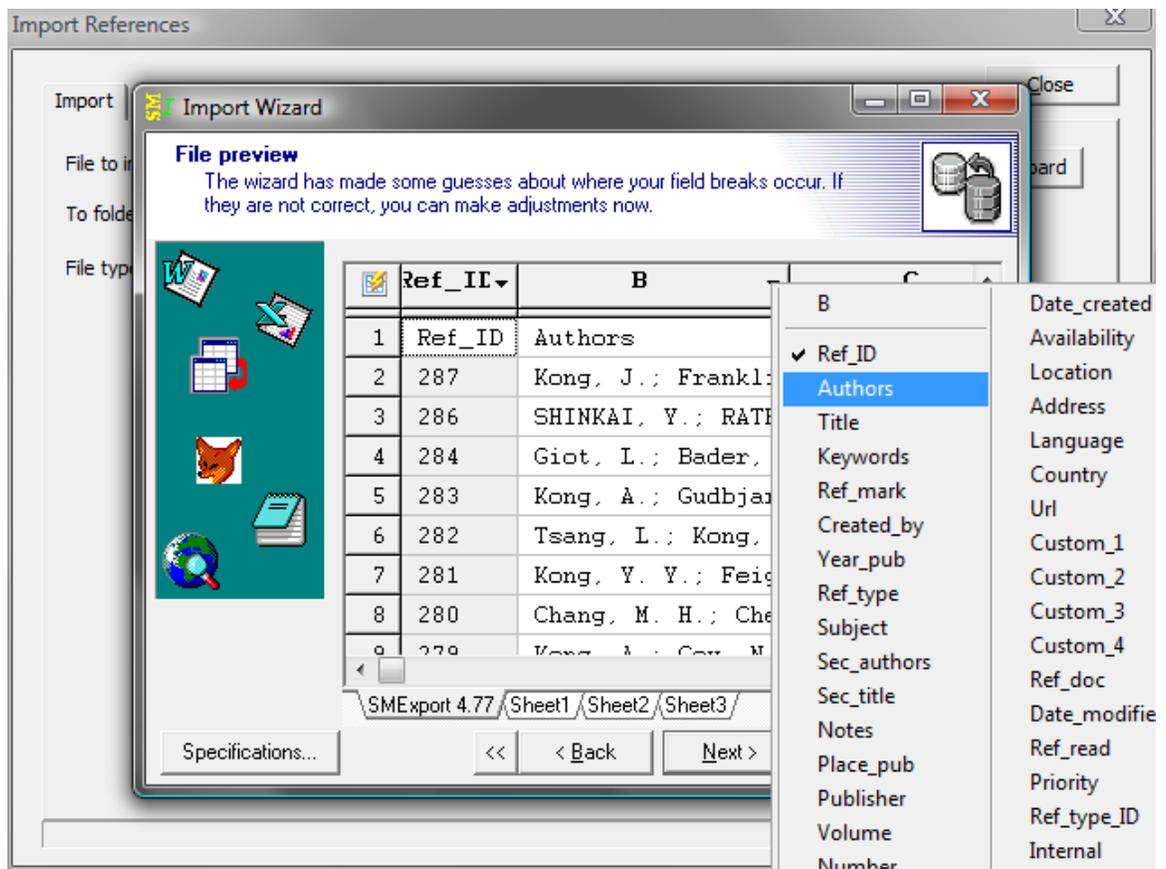
- In the third step, you can change the formats of "Dates, Times and Numbers" to match the ones used in your Excel file. You can also specify the first and the last rows to import. By default, "First row:" is set to 1. The "Last row:" is left blank which means all rows will be imported.



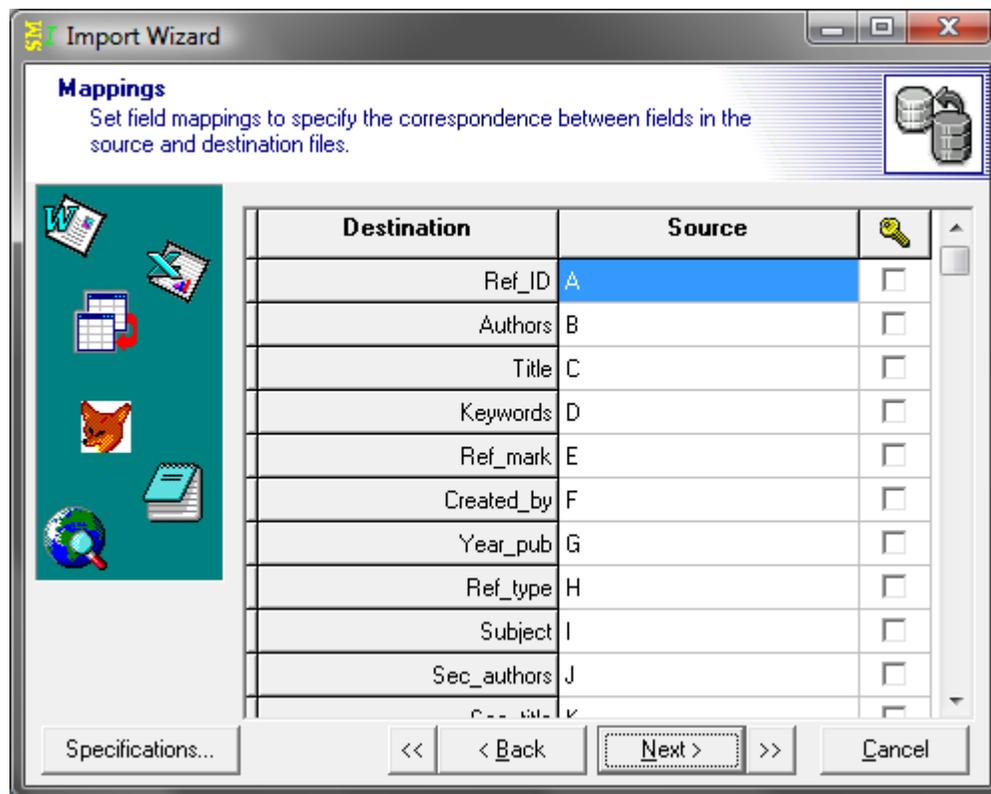
- This is the most important step because you need to map each column in your Excel file to a Biblioscope database field. The columns are first shown un-mapped in alphabetical order.



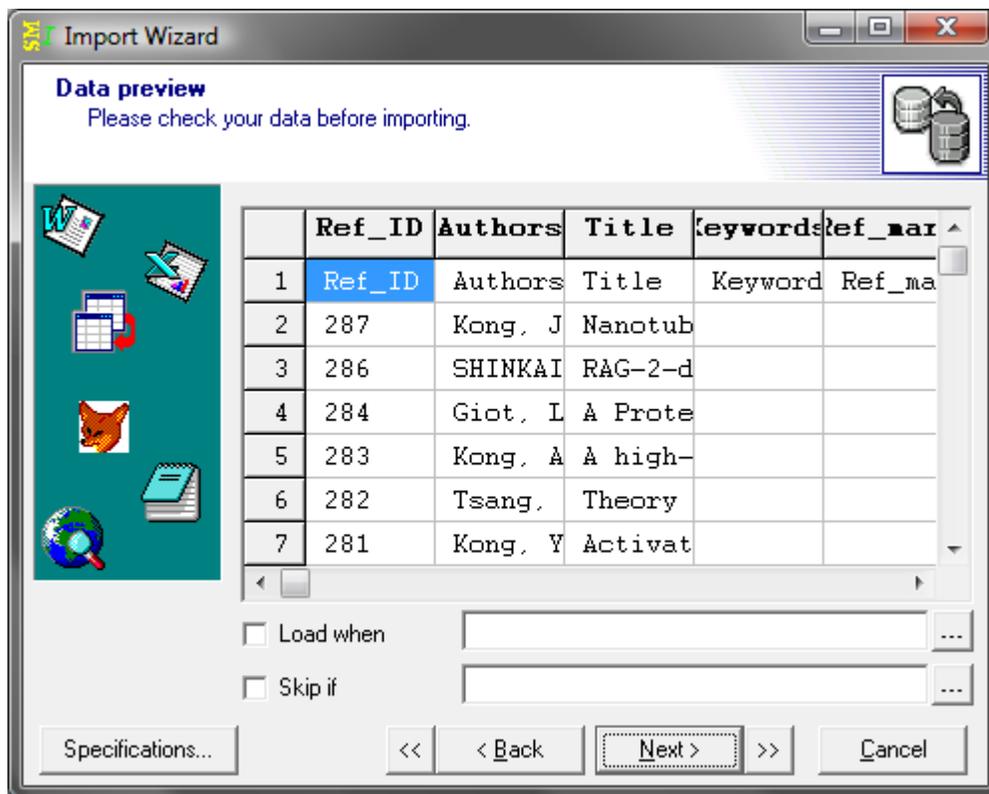
To map a column, click the down arrow in the column header. A popup list will be shown to allow you to pick the matching Biblioscape database field name. Start from Column A and map each column to a database field. After you map a column to a database field, the column header will be changed to the database field name. Once you finish mapping all columns, click the "Next" button.



- In this step, the mapped columns are displayed next to the database fields. You can choose a field as the key field, but this is not needed for importing into Biblioscape. If a column in your Excel file is not mapped to a database field, that column will be skipped during importing.



9. In this step, you can preview the mapped data, add conditions to load, or skip certain rows. Click the check box "Load when" and click the "..." button to add a condition for loading. Click the check box "Skip if" and click the "..." button to add a condition for skipping. For example, you can specify to skip all those rows with publication year less than 1950. To add a condition, you can use the "Expression Builder" to build it visually. In most cases, you will want to import all the records in your file. There is no need to add loading or skipping conditions.



10. In the last step, choose the "Import mode". In most cases, you should use the default "Append: add records to the destination table". Click the "Execute" button to start the import process.

#### 4.6.1.5 Import from BiblioExpress

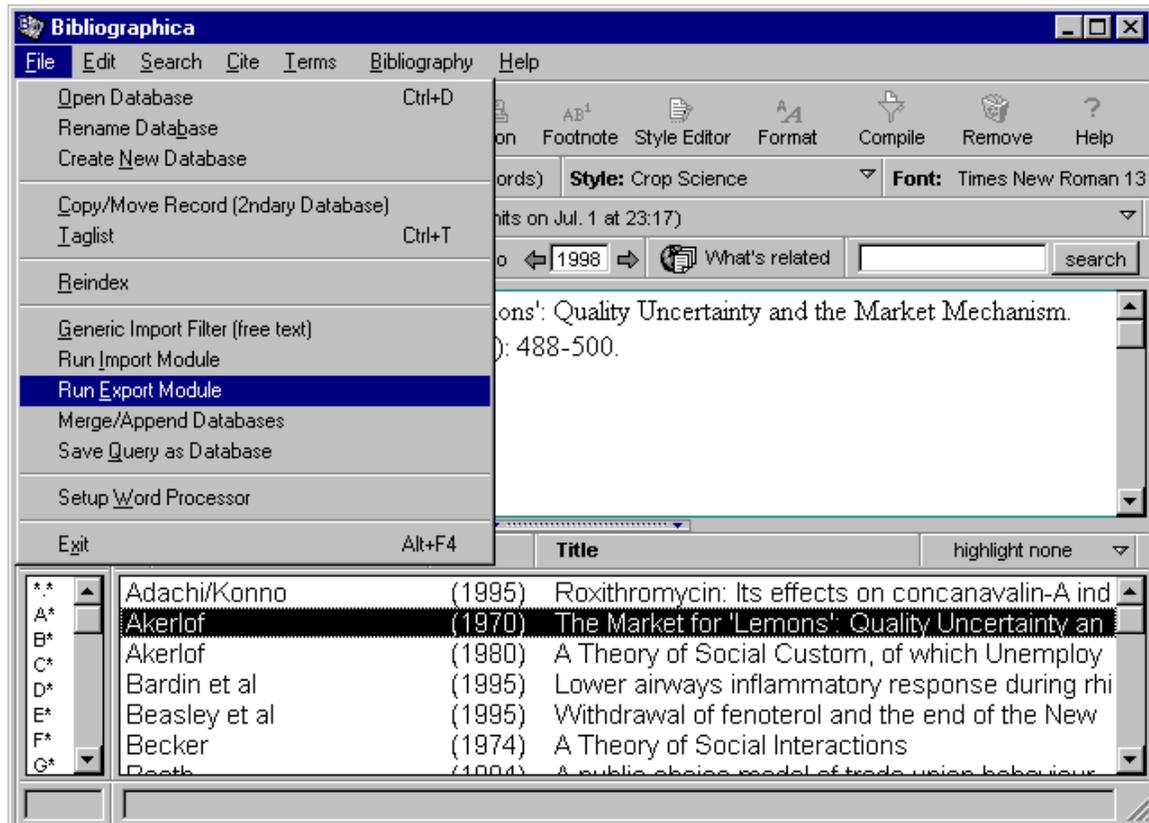
BiblioExpress stores its data in a database format. To import these records to Biblioscape, you have to first export BiblioExpress records as a plain text file Biblioscape tag file. Then, you must import the text file into Biblioscape using the import filter "Biblioscape Tag File".

1. Start BiblioExpress. Go to the menu command "File | Export | Biblioscape Tag File". Select the export folder and enter a file name.
2. Start Biblioscape. Click a references folder. You have to import references to a folder, not a collection or smart collection. Then go to the menu command "File | Import".
3. Click the "Browse" button and select the file you exported in step 1. On the "Tagged Plain Text" tab, select "Biblioscape Tag File" as the import filter. Click the "Start" button to import.

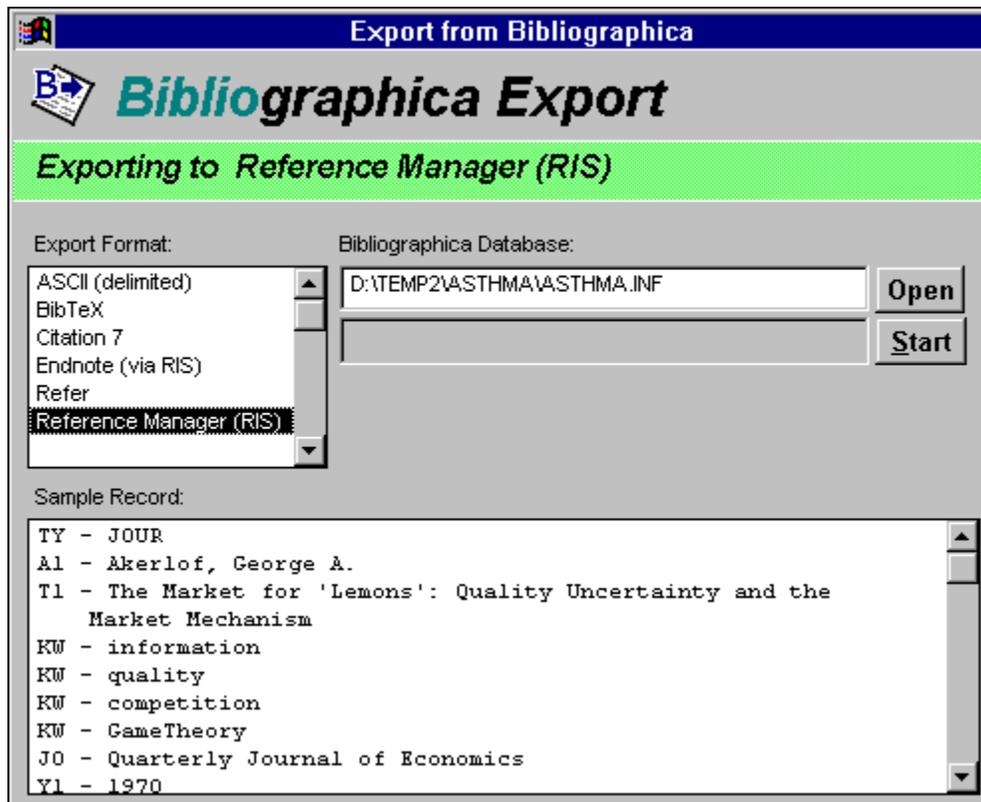
#### 4.6.1.6 Import from Bibliographica

If you are a Bibliographica user and want to try Biblioscape, you can easily transfer your bibliographic records in to a Biblioscape database. Follow the steps below to make the transfer.

1. Start Bibliographica and click the menu command "File | Run Export Module".



2. Click the "Open" button to select the Bibliographica database you wish to export, then select "Reference Manager (RIS)" as the "Export format". Click the "Start" button to start. A text file with the same name as the database will be created with ".ris" as a file extension. In our example, the file name is "asthma.ris" in the directory "D:\TEMP2 \ASTHMA\".



3. In Biblioscape, select the references folder where you want to import the records, and go to "File | Import...". Click the "Browse" button to select the file you exported in step 2. On the "Tagged Plain Text" tab, select "RIS -- Reference Manager" as the "Import filter". Click the "Start" button to import.

#### 4.6.1.7 Import from Biblioscape

Sometimes you may want to move a few references from one Biblioscape database to another. This can be done easily through reference export and import.

1. In Biblioscape, open a folder, a collection, or run a search to retrieve the records you want to export. If you only want to export a sub-set of records on the list, you need select those references.
2. Go to menu command "File | Export...".
3. Click the Browse button to select the export folder and enter a file name.
4. On the "Tagged Plain Text" tab, select "Biblioscape Tag File" as the export type.
5. Click the "Start" button to export the file.

6. Take the file to the other computer. Run Biblioscape, select the references folder to import the records, and go to "File | Import...".
7. Click the "Browse" button and select the file just exported.
8. On the "Tagged Plain Text" tab, select "Biblioscape Tag File" as the import filter.
9. Click the "Start" button to import.

#### 4.6.1.8 Import from Citation

If you are a Citation user and want to try Biblioscape, you can easily transfer your bibliographic records from a Citation database into a Biblioscape database. Follow the steps below to make the transfer.

1. A Citation database file is a text file with tags for each data field. It can therefore be imported directly into the Biblioscape database with the Biblioscape "Citation" import filter. The following is an example of a Citation database file:

```
>Article in a Journal (extended form)
>AU Myers, Bethany R.
>YR 1996
>AT Public problems: a thing of the present
>TR Williams, Jane
>PG 221-229
>JR Citizen Forum
>VO 8
>KW article in a journal, each issue begins on page 1
>AP Myers 1922
>RF Periodical, article in journal
>C2 Public problems
|
>Article in a Popular Periodical
>YR 1981
```

- >AT Telling time
- >DE editorial
- >PG 6, 7, 8
- >JR Newsweek
- >DM 8 March
- >KW article in a periodical, unsigned; unsigned, article in a periodical; editorial
- >AP Telling time
- >RF Periodical, unsigned article in a magazine
- >C2 asdfjk

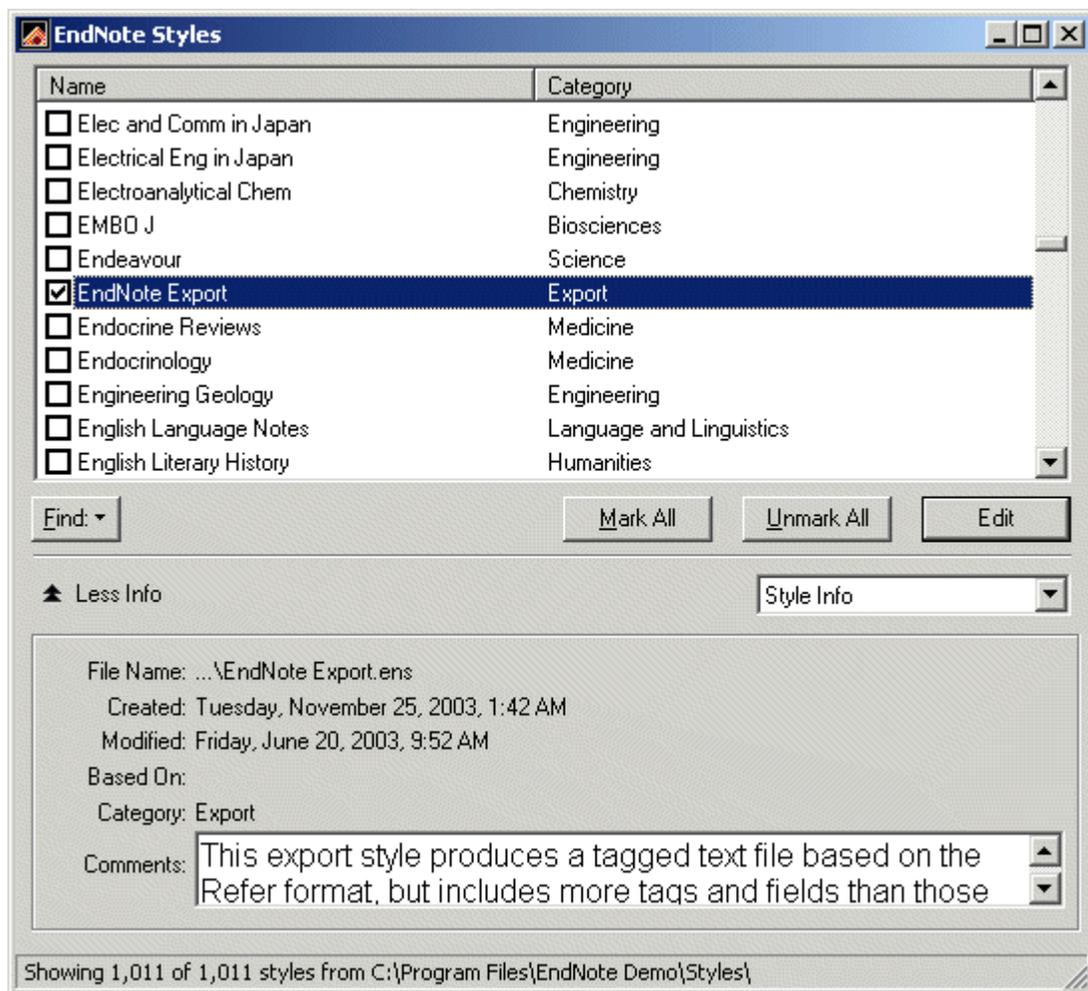
|

2. In Biblioscape, select the references folder where you want to import the records, and go to "File | Import...".
3. Click the "Browse" button to select the Citation database file.
4. On the "Tagged Plain Text" tab, select "Citation" as "Import filter".
5. Click the "Start" button to import.

#### 4.6.1.9 Import from EndNote

If you are an EndNote user and want to try Biblioscape, you can easily transfer your bibliographic records from an EndNote database into a Biblioscape database. Follow the steps below to make the transfer.

1. Start EndNote and click the menu command "Edit | Output Styles | Open Style Manager...". Then make sure the box before the "EndNote Export" item is checked. Now close the EndNote Styles window.



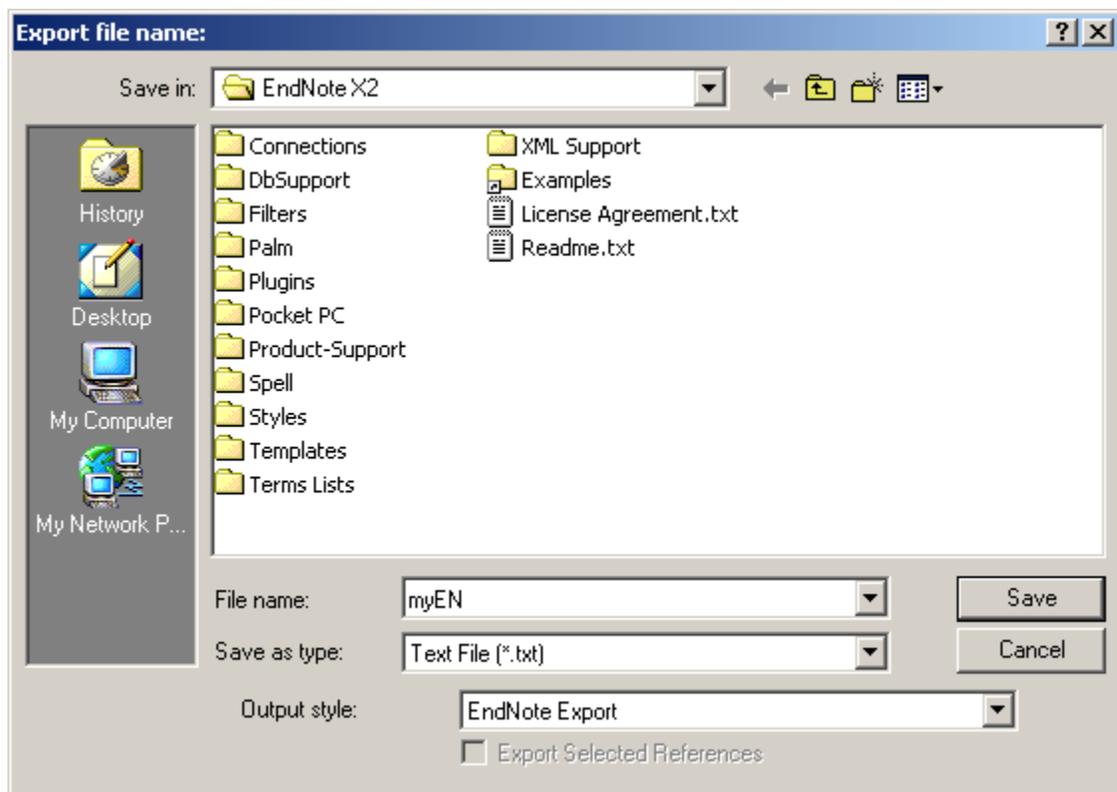
- Next, we need to export the EndNote references as a text file. Inside EndNote, select "EndNote Export" as the "Bibliographic Output Style". For EndNote X2, this can be selected in the references window.



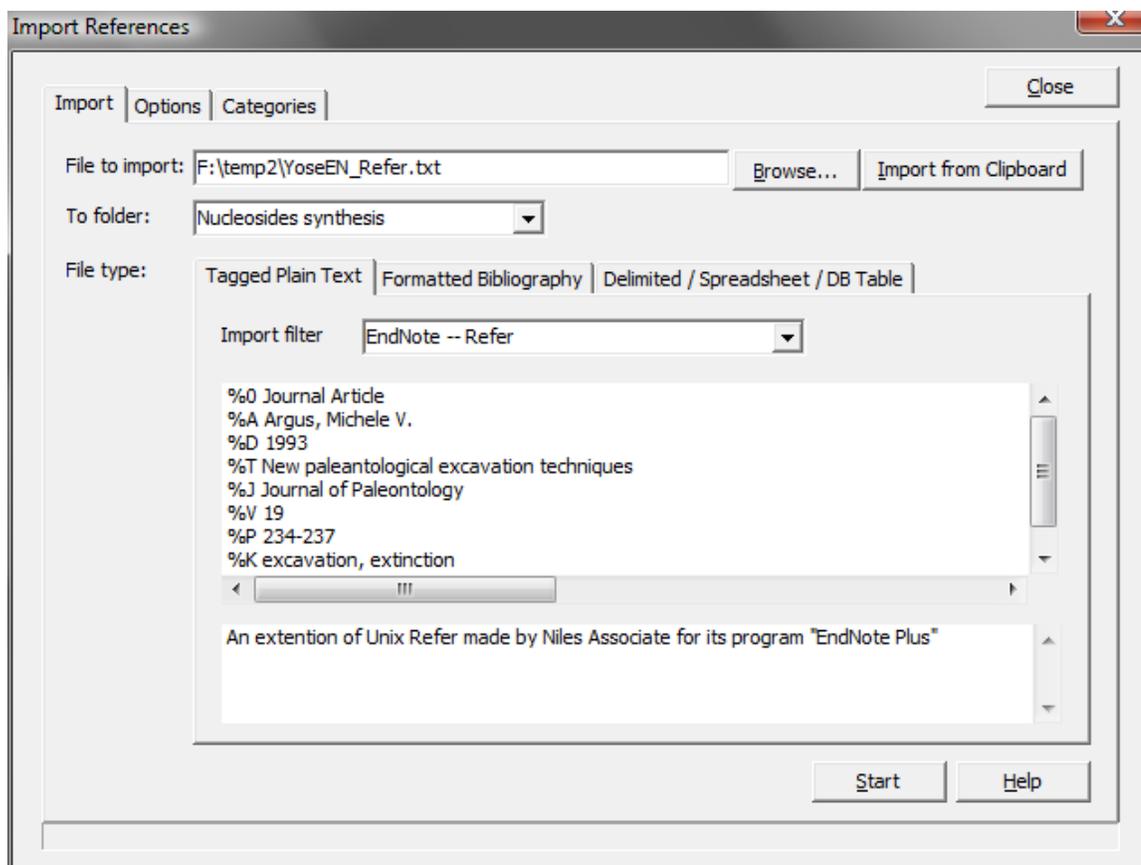
For earlier versions of EndNote, this can be selected in the EndNote toolbar.



- In EndNote, click the menu command "File | Export...". Select "Text File (\*.txt)" in the "Save as type" combo box, and select the export folder and enter a file name. Next to "Output Style:" at the bottom, make sure "EndNote Export" is selected. If not, please go to back to step 2 and select "EndNote Export" as the "Bibliographic Output Style".



4. Click the "Save" button. The records will be exported as a text file in EndNote Refer format.
5. Start Biblioscape. Select the folder where you want to import the records. Click the menu command "File | Import...".
6. Click the "Browse" button and select the file you just exported from EndNote. On the "Tagged Plain Text" tab, select "EndNote -- Refer" as the "Import filter".



7. Click the "Start" button to import the records.

Note: Since EndNote version 8, text files exported from EndNote are encoded in Unicode (UTF-8). Since the current release of Biblioscape does not support Unicode, special characters like German umlauts cannot be imported correctly. You need to open the EndNote exported file with Windows NotePad first and then go to "File | Save As" and change the encoding to ANSI. Unicode support is planned for the next major release of Biblioscape. This conversion will not be needed for non-English users once Unicode is supported.

#### 4.6.1.10 Import from NoteBuilder

The following instructions are for users to import references from NoteBulder of Pro Tem Software. The instructions are written by Gyorgy Gereby to be shared with others. The screenshots are from the Hungarian version of Windows. Here are the translations of some words that appear in the screenshots.

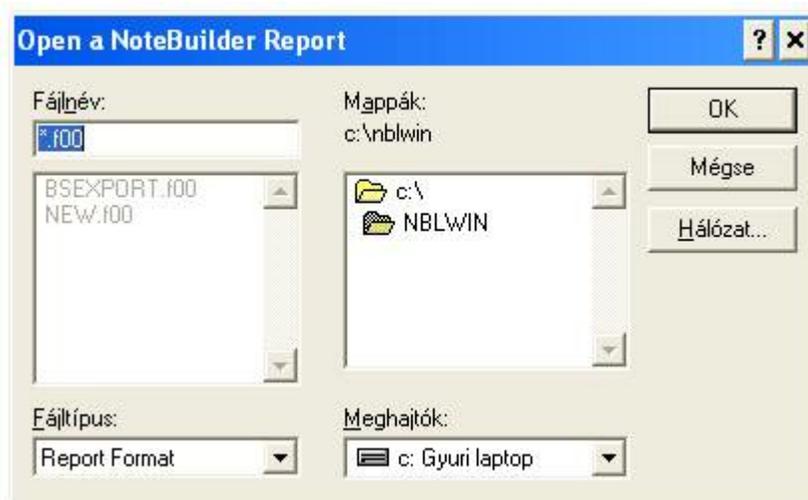
Fajlnev: File name

Mappak: Directories

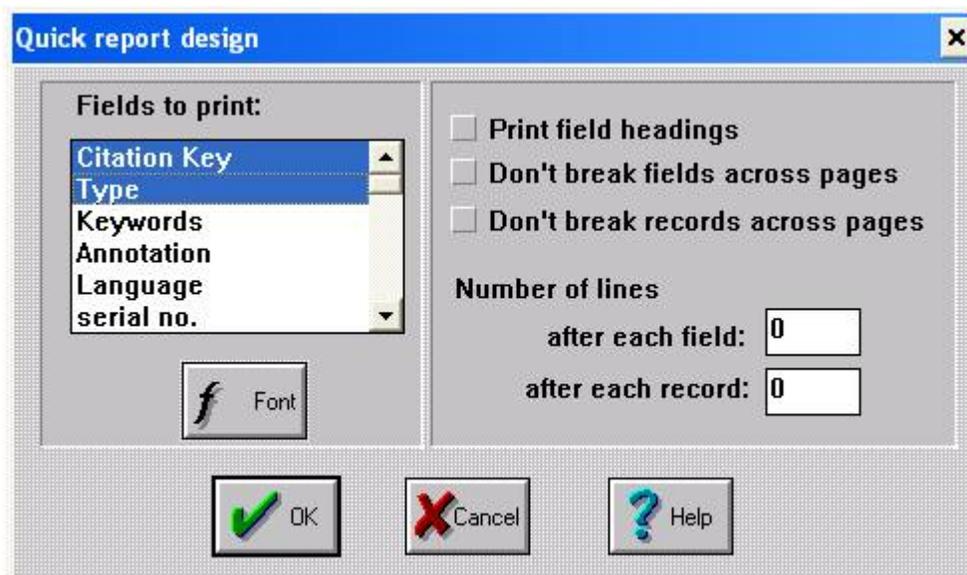
Fajltípus: File type

Meghajtók: Drive

1. Start NoteBuilder 1.04
2. Open database ( .dat file)
3. From REPORT menu select Quick Report.

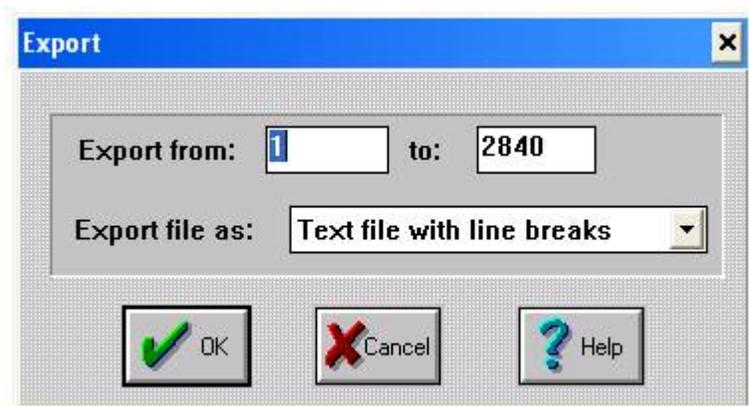


4. Enter a name (not longer than 8 characters). A .f00 file will be created.

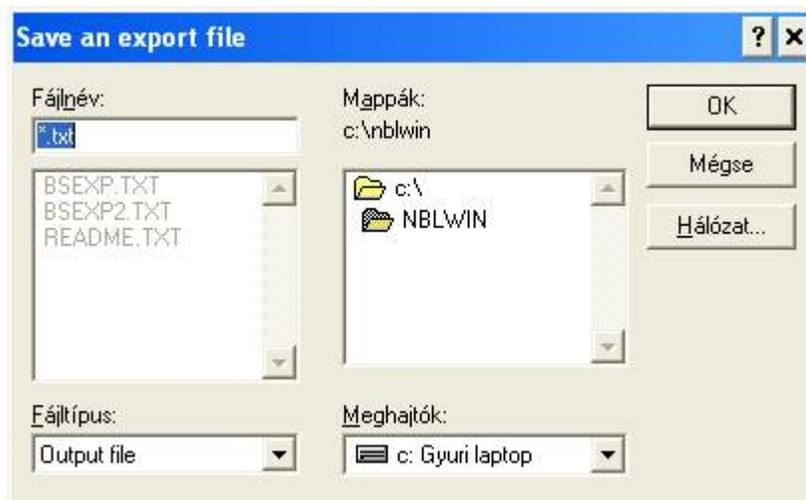


5. Check off the fields in the left box of the screen you want to print. Select only those you really want.

6. As you highlight the fields, you may want to change the font style for the currently highlighted field with the adjacent font tab.
7. Finally select from Quick report options: print field headings (check the box). It will print the names of the fields before the actual content of the field.
8. Leave the other two boxes unchecked (1. don't break fields ... 2. don't break records...)
9. Set the number of lines between each field to zero.
10. Set the number of lines after each record to one.
11. Click OK.
12. Go to the File menu.
13. Select Export



14. Select numbers in the options box „ Export from [number] to [number]“. Default is the first and last number of your records in the NoteBuilder database.
15. Select in the "Export file as:" option the "Text file with line breaks".
16. Click OK.
17. Save the export file under a name (not longer than 8 characters).



A Status window will appear as long as the file is prepared.



You will end up with a name.txt file which can further be fed into Biblioscape.

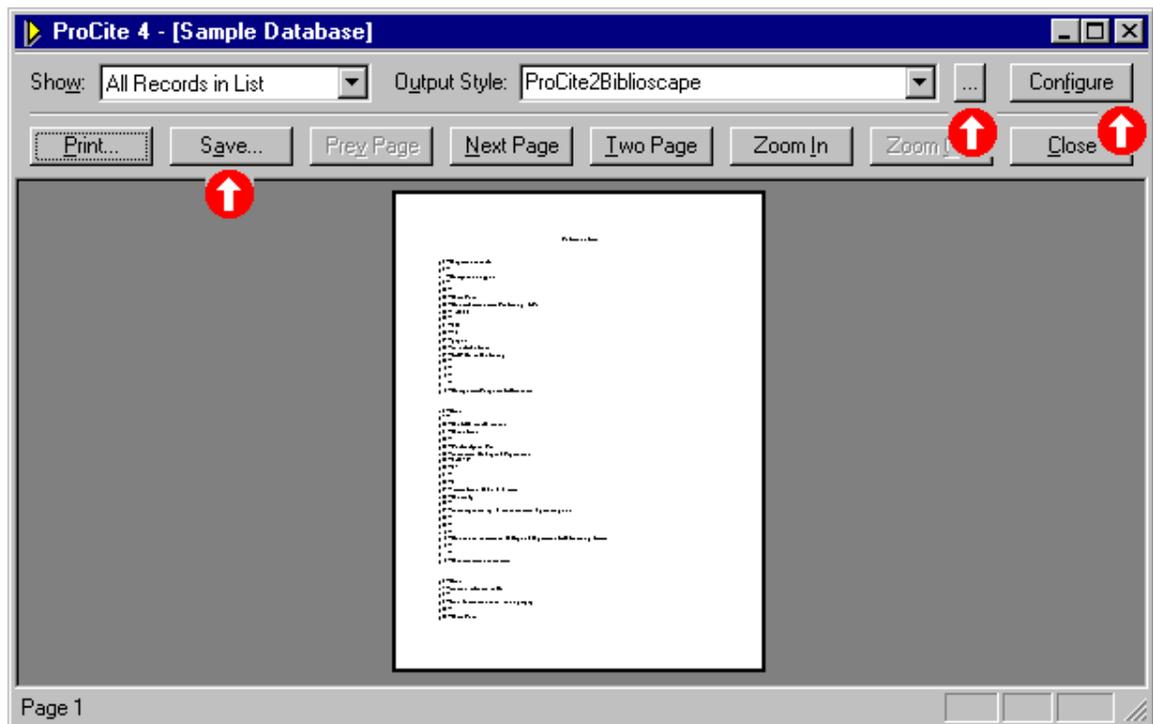
Note: You can find additional information in the HELP menu of NoteBuilder.

#### 4.6.1.11 Import from ProCite

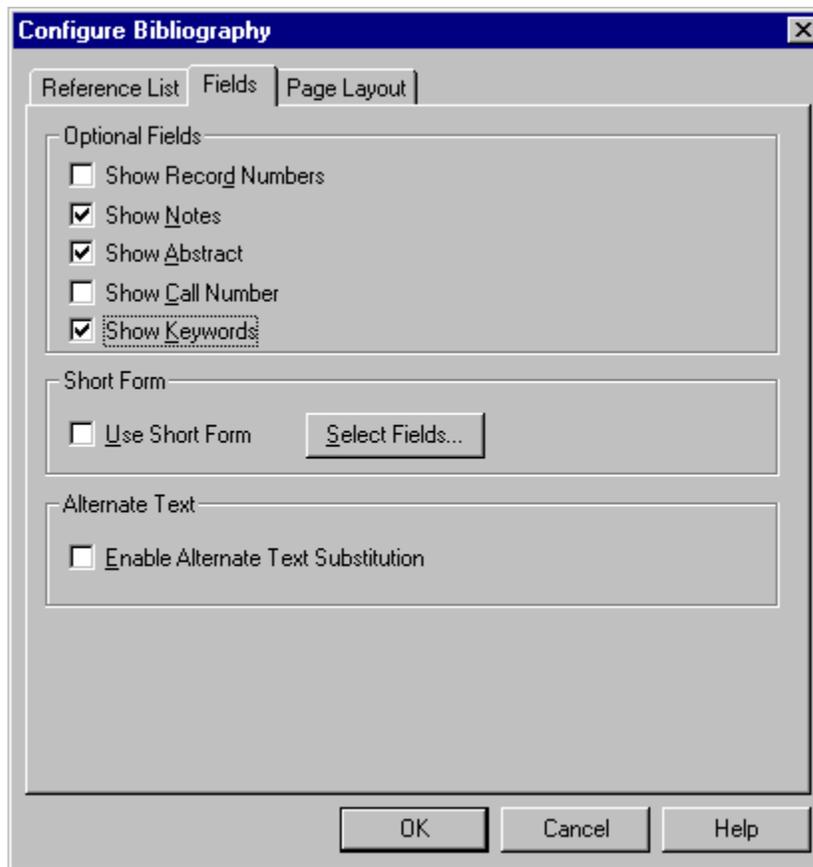
If you are a ProCite user and want to try Biblioscape, you can easily transfer your bibliographic records from a ProCite database into a Biblioscape database. Follow the steps below to make the transfer.

1. Start Windows file manager and move the ProCite style file from "...\Biblioscape X\tools\procite2biblioscape.pos" to the "C:\Program Files\ProCite 4\Styles\" folder (if you are using ProCite 5, move it to the "C:\Program Files\ProCite 5\Styles\Standard\" folder).
2. Start ProCite and click the menu command "File | Print Bibliography".
3. Click the "..." button and select the style file "ProCite2Biblioscape.pos" mentioned in Step

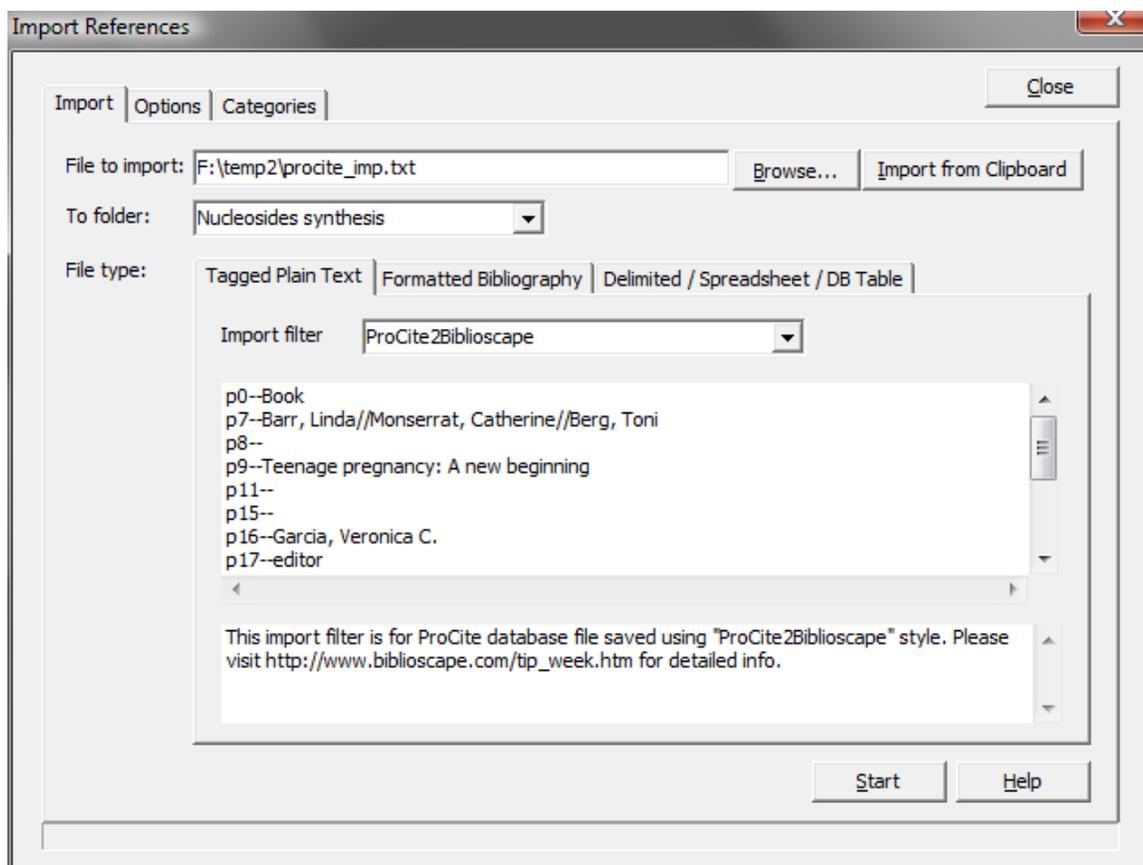
1.



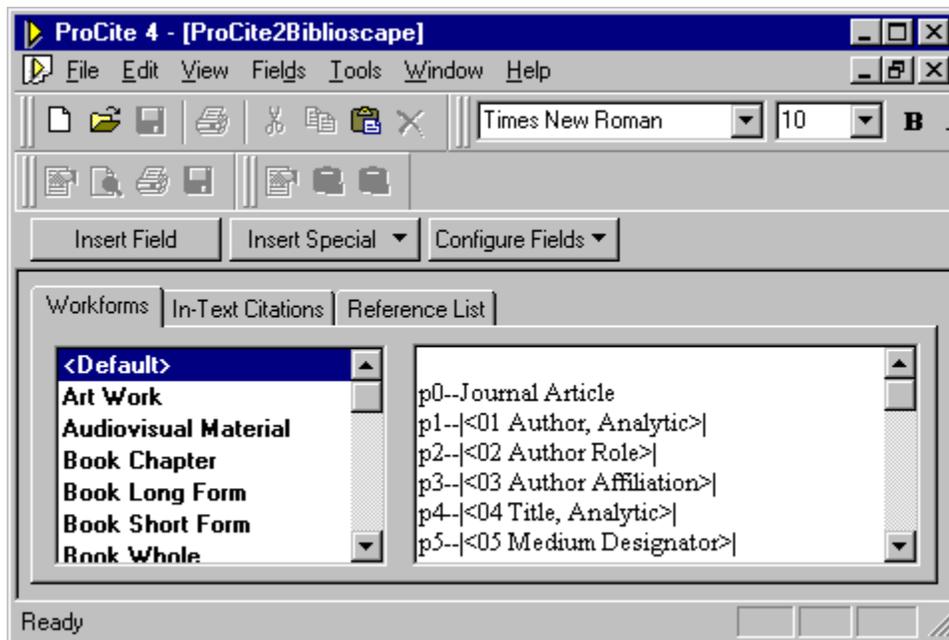
4. Click the "Configure" button, select the "Fields" tab, and check the boxes "Show Notes", "Show Abstract", and "Show Keywords". Click the "OK" button.



5. Return to the Print Preview window in step 3, and click the "Save..." button to save it as a text file. The default file type may be set as "Rich Text Format" after clicking the "Save..." button, so be sure to change it to the "Text" file format.
6. Start Bibioscape, select the references folder where you want to import the records and click the menu command "File | Import...".
7. Click the "Browse" button and select the file you just exported from ProCite. On the "Tagged Plain Text" tab, select "ProCite2Bibioscape" as the "Import filter", then click the "Start" button to import.



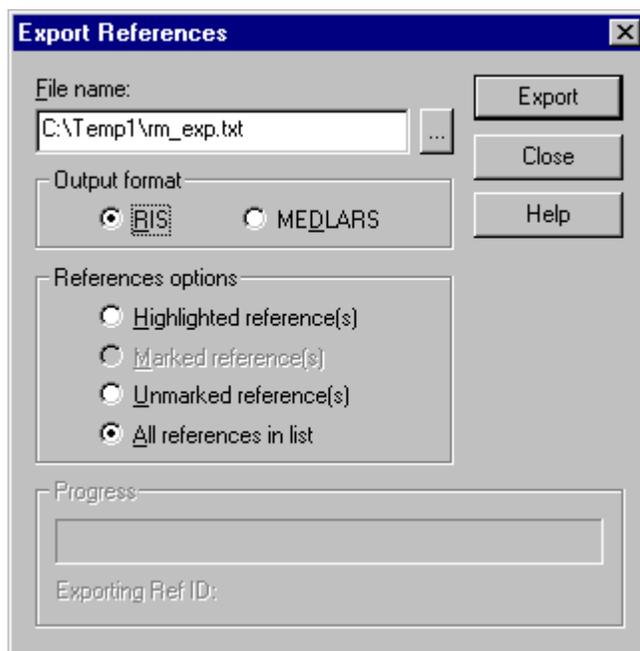
Note: If you have customized workforms in your ProCite database, you need to modify the ProCite style file "ProCite2Bibioscape.pos" so that each of your customized workforms will correspond to a "Reference Type" in the Bibioscape database. You should put the appropriate Bibioscape reference type after tag "p0--" (see the screen shot below), and list all other fields under their corresponding tags, for example "p1--", "p2--", etc.



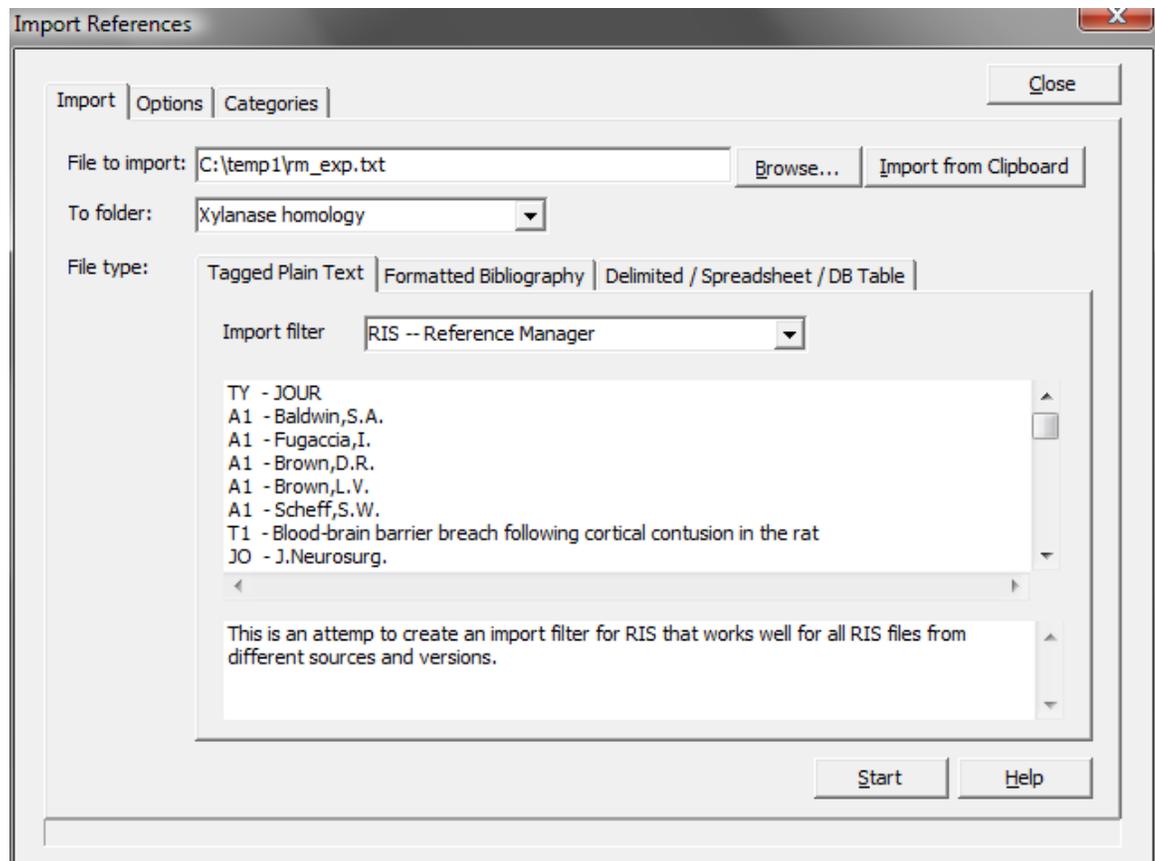
#### 4.6.1.12 Import from Reference Manager

If you are a Reference Manager user and want to try Bibloscape, you can easily transfer your bibliographic records from a Reference Manager database into a Bibloscape database. Follow the steps below to make the transfer.

1. Start Reference Manager and click the menu command "References | Export...".



2. Click the "..." button, select the export folder, and enter a file name.
3. Select "RIS" as the "Output format" and "All references in list" in the "References options".
4. Click the "Export" button.
5. Start Biblioscape, select the references folder where you want to import the records, and go to "File | Import...".

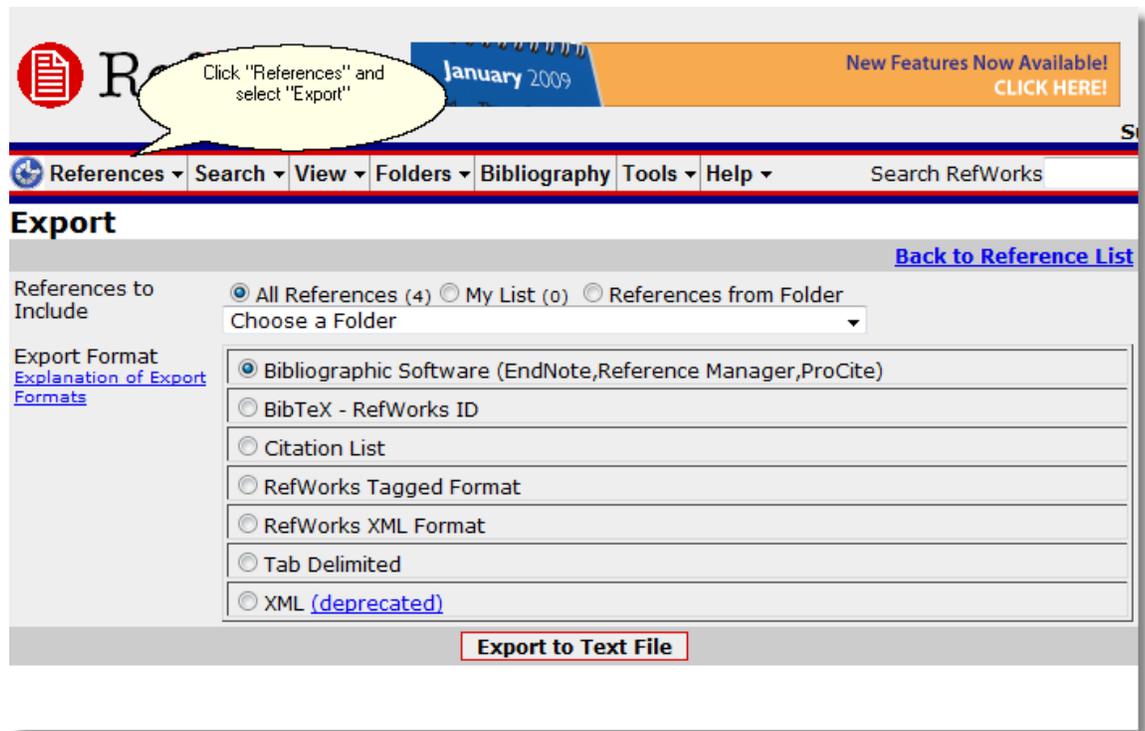


6. Click the "Browse" button to select the file you exported from Reference Manager.
7. On the "Tagged Plain Text" tab, select "RIS -- Reference Manager" as the "Import filter".
8. Click the "Start" button to import.

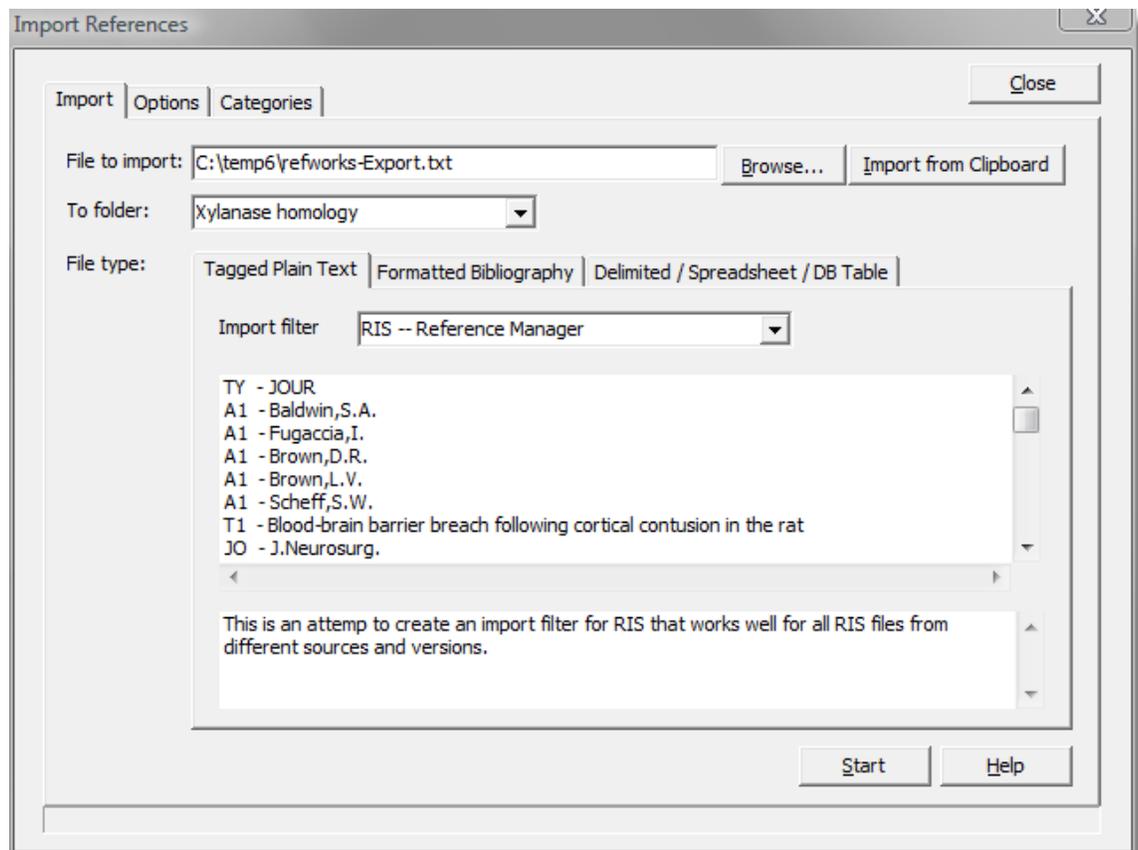
#### 4.6.1.13 Import from RefWorks

RefWorks is a Web based reference manager. You can easily import your RefWorks references into Biblioscape.

1. In RefWorks, click the top menu "References" and select "Export".



2. You can choose to export "All References", your current list "My List", or "References from a Folder".
3. Under "Export Format", select "Bibliographic Software (EndNote, Reference Manager, ProCite)".
4. Click the "Export to Text File" button at the bottom to export.
5. If the program doesn't prompt you to save a file, the export file may appear in a separate browser tab. You can then go to "File | Save As..." and save the export records as a plain text file.
6. In Biblioscape, select a references folder where you want to import RefWorks references.
7. In Biblioscape, go to "File | Import...".

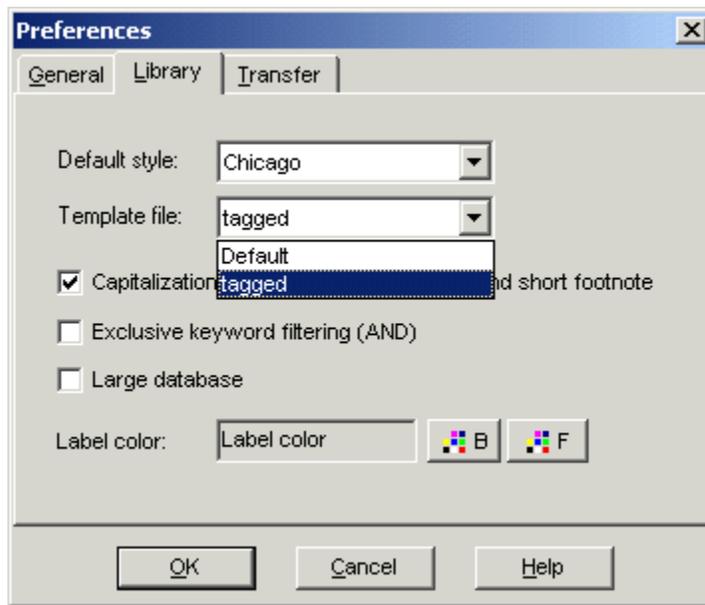


8. Click the "Browse..." button and select the file you just exported from RefWorks.
9. Select "RIS -- Reference Manager" as the "Import filter".
10. Click the "Start" button to import.

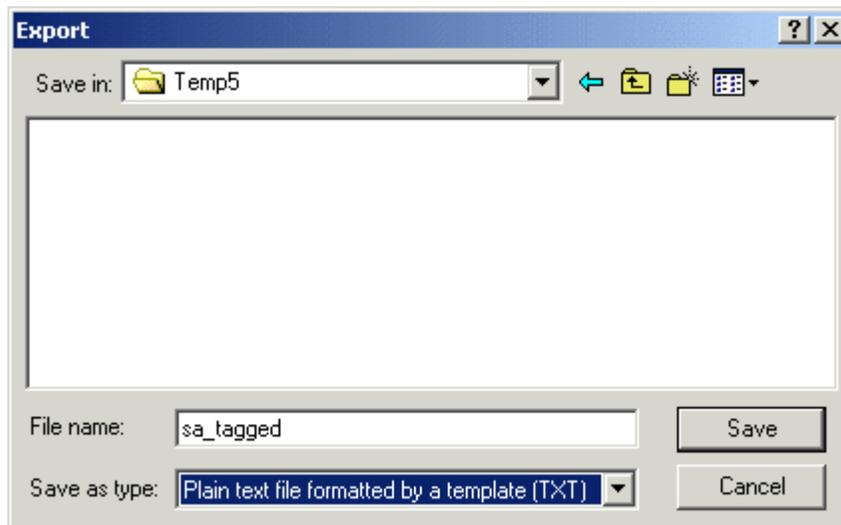
#### 4.6.1.14 Import from Scholar's Aid

If you are a Scholar's Aid user and want to give Biblioscape a try, you can transfer your bibliographic records from a Scholar's Aid database into a Biblioscape database easily. Here are the simple steps you can follow.

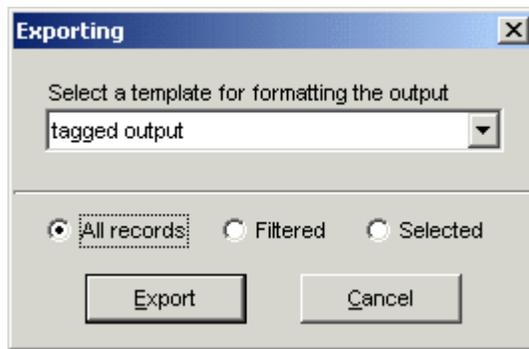
1. Click here to download the needed Scholar's Aid template file. Unzip it to the folder "C:\Program Files\Scholar's Aid\SysData\".
2. Start Scholar's Aid. Go to the menu command "File | Preferences...".
3. On the Preferences window, go to the "Library" tab. Click the combo box "Template file:" and select "tagged". Click the OK button to close the Preferences window.



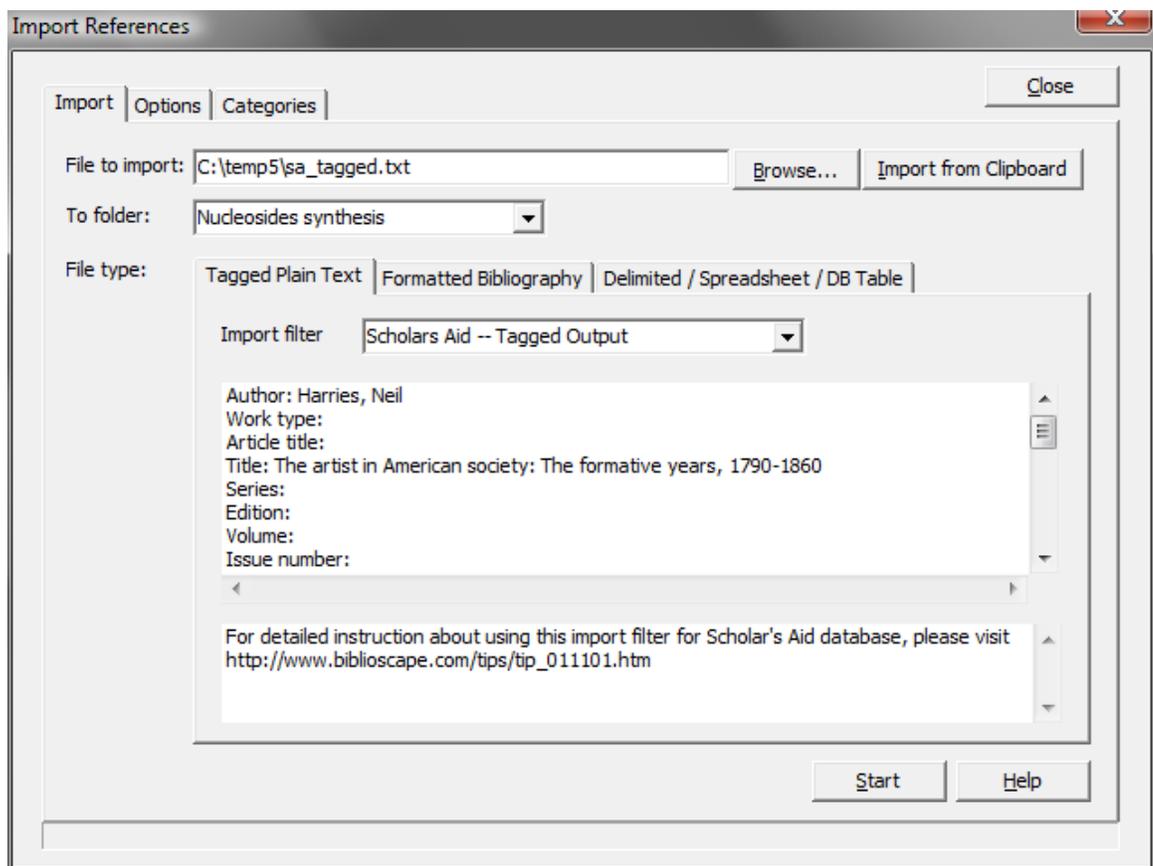
4. In Scholar's Aid, go to the menu command "File | Export to...". On the Export Window, go to the folder where you want to save the export file and enter a file name. Select "Plain text file formatted by a template (TXT)" as the "Save as type". Click the "Save" button.



5. The Export window will be shown. Make sure "tagged output" is selected. Check "All records" in order to export all records in your database. Click "Export" to start exporting.



6. In Biblioscape, select the references folder where you want to import, and go to the menu command "File | Import...".
7. Click "Browse" to select the file you exported in step 5 as the "File to import". On the "Tagged Plain Text" tab, select "Scholars Aid -- Tagged Output" as the import filter to use. Click "Start" to import.



#### 4.6.1.15 Import from Zotero

Zotero is a web based reference manager. It stores references and notes associated with a

reference. When exporting references from Zotero, there are 3 options: RIS; Refer/BibIX; BibTeX. Only the RIS option allows you to export references and notes. We recommend you use this option so your notes will also be imported into Biblioscape. The Zotero notes will be imported into the Biblioscape reference Memo field instead of the notes module. Zotero allows users to take many notes for a single reference. After importing into Biblioscape, each Zotero note will be separated by "; " in the Biblioscape Memo field.

1. In Zotero, click "Actions" and select "Export Library...".

The screenshot is divided into two main sections: a web browser window at the top and the Zotero application interface at the bottom.

**Browser Window (Top):**

- Address Bar:** <http://en.wikipedia.org/wiki/Zotero>
- Page Title:** Zotero
- Page Content:**
  - Section Header:** Zotero
  - Text:** From Wikipedia, the free encyclopedia
  - Paragraph 1:** Zotero is a free, open source extension for the Firefox browser, that enables users to collect, manage, and cite research from all types of sources from the browser. It is partly a piece of reference management software, used to manage bibliographies and references when writing essays and articles. On many major research websites such as digital libraries, Google Scholar, Google Books, Amazon.com, and even Wikipedia, Zotero detects when a book, article, or other resource is being viewed and with a mouse click finds and saves the full reference information to a local file. If the source is an online article or web page, Zotero can optionally store a local copy of the source. Users can then add notes, tags, and their own metadata through the in-browser interface. Selections of the local reference library data can later be exported as formatted bibliographies.
  - Paragraph 2:** The program is produced by the Center for History and New Media of George Mason University (GMU). It is open and extensible, allowing other users to contribute citation styles and site translators, and more generally for others who are building digital libraries to expand the platform.<sup>[1]</sup> The program is written in JavaScript and uses an Albanian verb as a metaphor for its more cumbersome interface.
- Right Sidebar:**
  - Developed by:** Center for History and New Media (CHNM) at George Mason University (GMU)
  - Initial release:** October 23, 2006
  - Stable release:** 1.09 (23 December 2008; 59 days ago) [+/-]
  - Preview release:** 1.5 (18 December 2008; 64 days ago) [+/-]
  - Written in:** JavaScript with SQLite backend
  - OS:** Cross-platform
  - Available in:** English

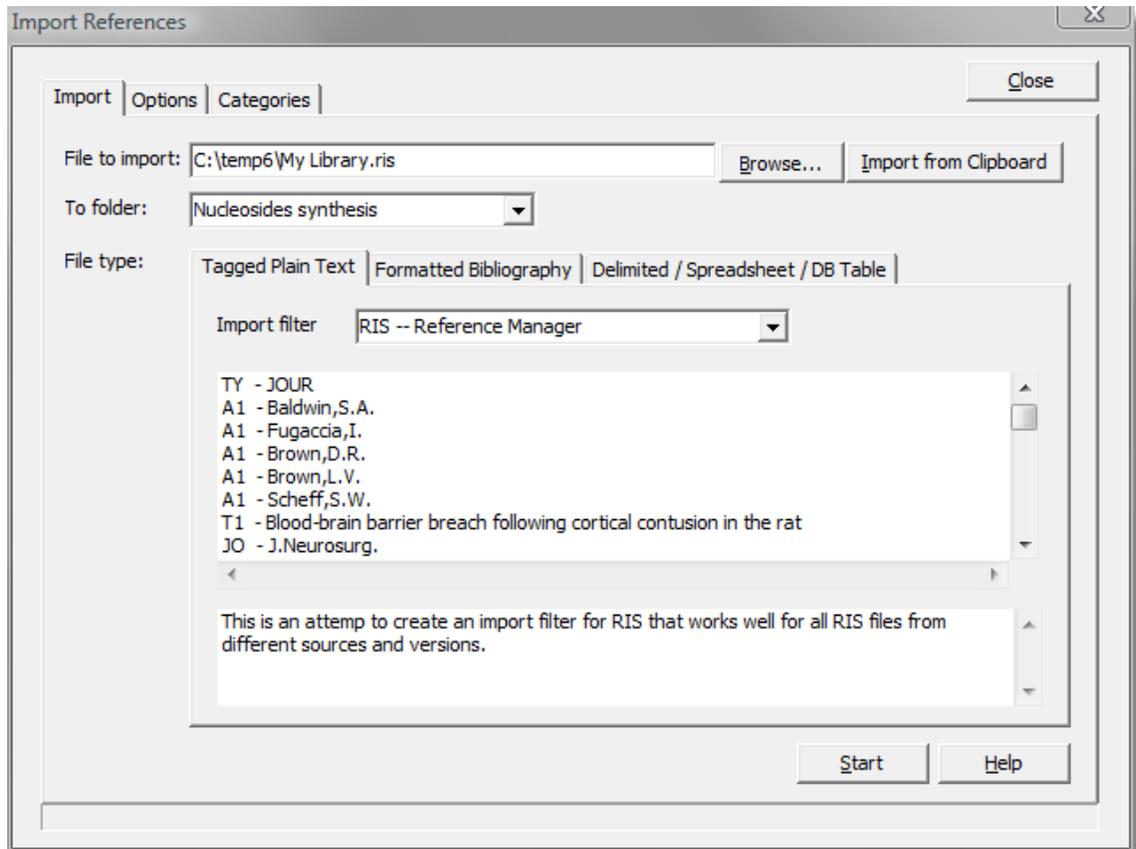
**Zotero Application Interface (Bottom):**

- Left Panel:** Collections (My Library), No tags to display, Filter: [ ], 0 tags selected, Deselect.
- Center Panel:** List of references with columns for Title, Author, and Date.
  - Item 1: Hib infections are as common as ever
  - Item 2: Hib infections are as common as ever
  - Item 3: Another test
  - Item 4: this is a test
  - Item 5: Zotero - Quick Start Guide
  - Item 6: The story of jon mccain Smith, Burb
  - Item 7: Initial sequencing and ... Lander et al.
  - Item 8: Rapid turnover of plas... Ho et al.
  - Item 9: High-efficiency transfo... Chen and O...
  - Item 10: High-efficiency transfo... Chen and O...
  - Item 11: The entity-relationship ... Chen
  - Item 12: The entity-relationship ... Chen
  - Item 13: The entity-relationship ... Chen
- Right Panel:** Info, Notes, Attachments, Tags, Related.
  - Title:** Hib infections are as common as ever
  - Author:** (last), (first)
  - Abstract:**
  - Publication:** BMJ
  - Volume:** 329
  - Issue:** 7467
  - Pages:** 0-b-
  - Date:** 2004
  - Series:**

**Annotations:**

- Yellow Callout 1:** Click the "Actions" button and select "Export Library..." (points to the Actions button in the browser window).
- Yellow Callout 2:** Notes associated with a reference. Zotero notes will be imported into Bibloscape reference "Memo" field. (points to the Notes tab in the application interface).

2. Select "RIS" as the export format. Check the box "Export Notes" and click the OK button to export.
3. Select the export folder, enter an export file name, and click "Save".
4. In Biblioscape, select a references folder where you want to import Zotero references.
5. In Biblioscape, go to "File | Import...".



6. Click the "Browse..." button and select the file you have just exported from Zotero.
7. Select "RIS -- Reference Manager" as the "Import filter".
8. Click the "Start" button to import.

#### 4.6.1.16 Import from CiteSeerX

CiteSeerX is a scientific literature digital library and search engine that focuses primarily on literature in computer and information science. After searching at CiteSeerX, you can add your hits to a MetaCart. When you are ready to export your records, go to the MetaCart and click "BibTeX" to export.

1. Run your search. Click the "Add To MetaCart" link for the records you want to save.

The screenshot shows the CiteSeerX beta website interface. At the top, there is a navigation bar with links for Home, Statistics, Documents, About, Feedback, Bulletin, Submit, MetaCart, and Sign in to MyCiteSeerX. A search bar contains the query 'liver' and a 'Search' button. Below the search bar, there are options for 'Include Citations', 'Advanced Search', and 'Help'. The main content area displays search results for 'liver', sorted by Relevance. The results are grouped into sections: 'LIVER DISEASE', 'LIVER REGENERATION 7', and 'Overview of an ultrasound to ct or mr registration system for use in thermal ablation of liver'. Each section includes the authors, a brief description, and an 'Add To MetaCart' link. Two callout boxes provide instructions: one points to the 'Add To MetaCart' link and says 'Click "Add to MetaCart" for the references you want to save', and another points to the search bar and says 'Click "MetaCart" when you are ready to export your records'. The page also shows '1,747 documents found, showing 1 through 10. Next 10 ->' and 'ATOM' and 'RSS' buttons.

Home | Statistics | Documents | About | Feedback | Bulletin | Submit | MetaCart | Sign in to MyCiteSeerX

CiteSeer<sup>x</sup> beta

Documents | Authors | Search

liver

Include Citations | [Advanced Search](#) | [Help](#)

**Searching for liver – sorted by Relevance.**

Order by: [Citations](#) | [Year \(Descending\)](#) | [Year \(Ascending\)](#) | [Recency](#)  
Try your query at: [Scholar](#) | [Yahoo!](#) | [Ask](#) | [MS Live](#) | [CSB](#)

1,747 documents found, showing 1 through 10. [Next 10 ->](#) [ATOM](#) [RSS](#)

▼ [LIVER DISEASE](#)  
by S Hillaire, E Bonte, M-h Denninger, N Casadevall, J-f Cadranel, D Lebrec, D Valla, C Degott, S Hillaire, E Bonte, M-h Denninger, N Casadevall, J-f Cadranel, D Lebrec, D Valla, C Degott — 2001 ... collections [Hypertension](#) [Liver](#), including hepatitis (951 articles) **LIVER DISEASE** Idiopathic...  
[Add To MetaCart](#)

▼ [LIVER REGENERATION 7](#)  
by unknown authors  
...**LIVER** REGENERATION 7 Prometheus' myth revisited: transgenic mice as a powerful tool to study **liver**...  
[Add To MetaCart](#)

▼ [Overview of an ultrasound to ct or mr registration system for use in thermal ablation of liver](#)  
by Graeme P. Penney, Jane M. Blackall, Daichi Hayashi, Tarun Sabharwal, Andreas Adam, David J. Hawkes — 2001 — In MIUA'01  
...Overview of an ultrasound to CT or MR registration system for use in thermal ablation of **liver**...  
Cited by 5 (0 self) - [Add To MetaCart](#)

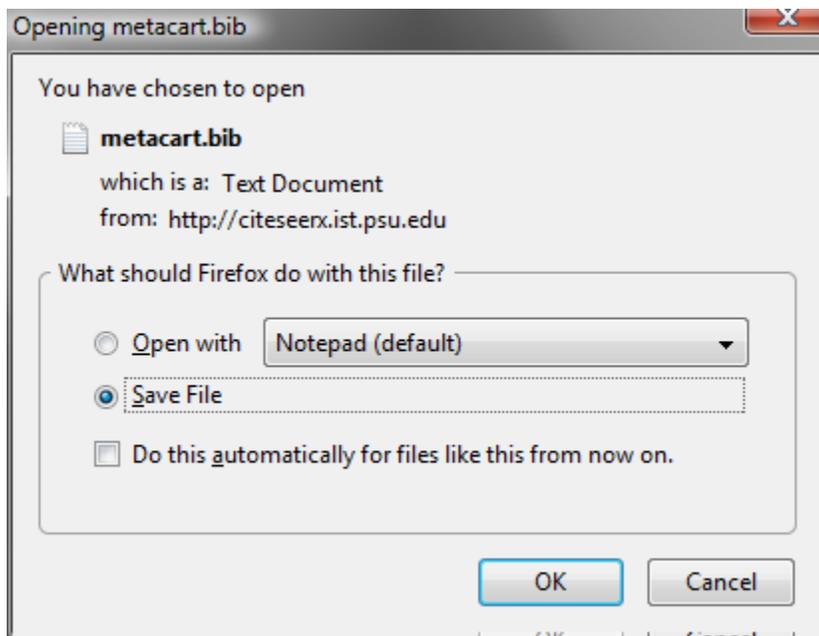
2. Click the "BibTeX" hyperlink to export records in your MetaCart.

The screenshot shows the CiteSeerX beta website interface. At the top, there is a navigation bar with links for Home, Statistics, About, Bulletin, Submit, Documents, Feedback, MetaCart, and Sign in to MyCiteSeerX. Below the navigation bar is the CiteSeerX logo and a search box with buttons for Documents, Authors, and Tables. A search button is also present. Below the search box is a checkbox for 'Include Citations' and links for 'Advanced Search' and 'Help'. The main content area is titled 'MetaCart' and contains a list of documents. A callout bubble points to the 'BibTeX' link in the 'Download' section, with the text 'Click "BibTeX" to export records in your MetaCart'. The list of documents includes:

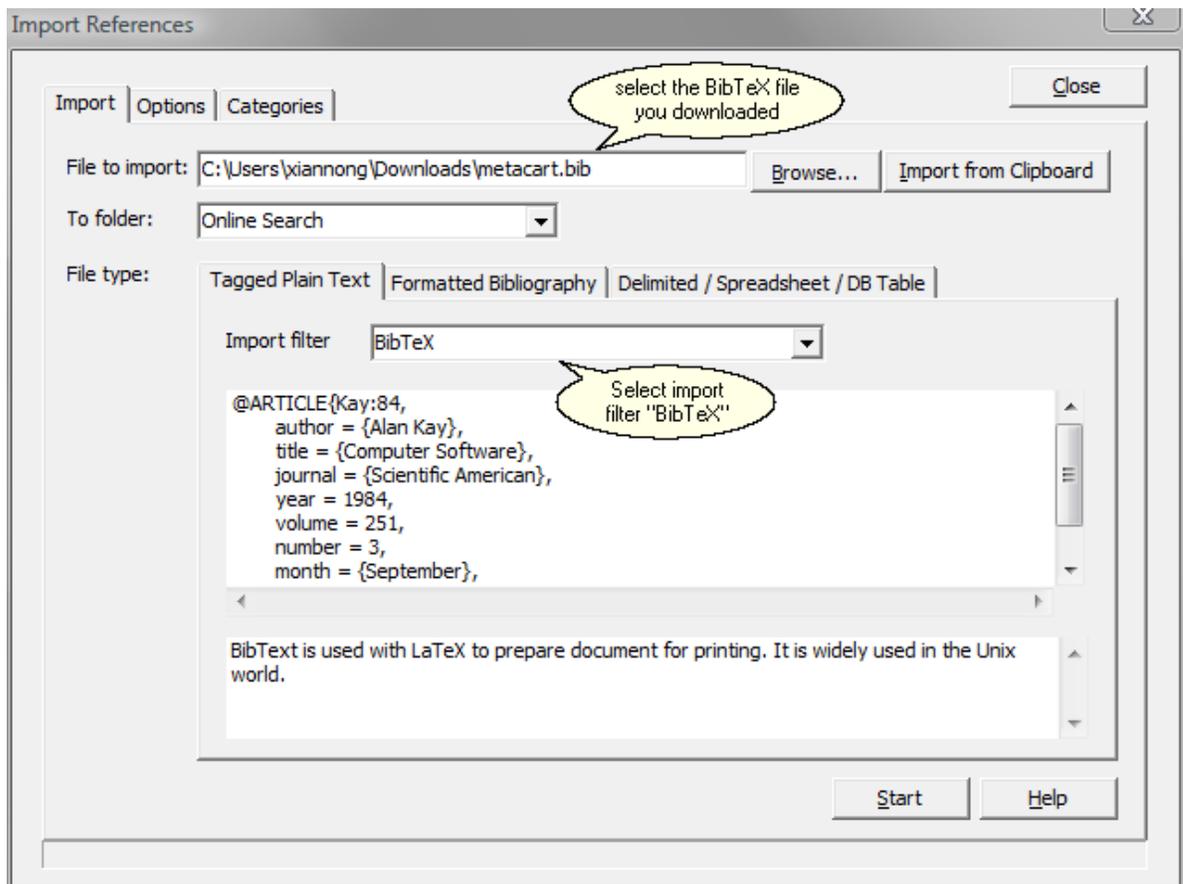
- Optimal Designs for Heart Defibrillators (1993) by M Clyde, P Muller, G Parmigiani in Case Studies in Bayesian Statistics, II. [Delete](#)
- Modeling The Dynamic Human Heart by Edilberto Strauss, Peter Burger. [Delete](#)
- Volumetric heart modeling and analysis by K Park, A Montillo, D Metaxas, L Axel Communications of the ACM. [Delete](#)
- Wavelet packet modelling of infant sleep state using heart rate data (1999) by G P Nason, T Sapatinas, A Sawczenko. [Delete](#)

At the bottom of the page, there is a footer with links for Home, Statistics, About CiteSeerX, Bulletin, Submit Documents, Feedback, Privacy Policy, OAI, and Source Code. The copyright notice is © 2007 The Pennsylvania State University.

3. You will be prompted to select an application to open the downloaded metacart.bib file or save file. Select "Save File" and click the OK button. If you use FireFox, it will not prompt you where to save the file. The file will be saved to FireFox's default folder. You can find it by go to "Tools | Options" in FireFox. Check the "Main" tab and "Download" section about the default "Save files to" folder.

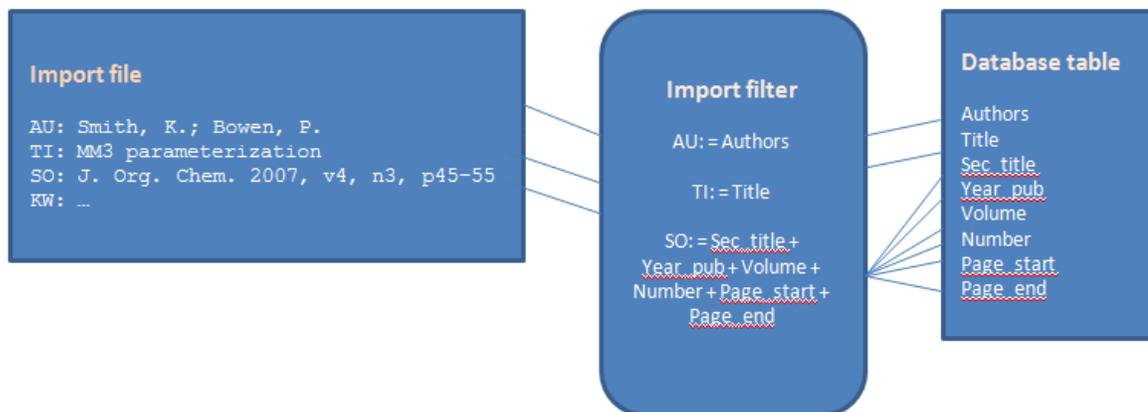


4. After the file is saved, Switch to Biblioscape and go to the menu command "File | Import...". Select the file you just saved. Choose the import filter "BibTeX" and click the "Start" button to import.



## 4.6.2 About import filter

An import filter directs Biblioscape how to import a tagged file into a database. Import filter acts as a text parser. It matches tagged field in your text file to a data field in your database table.



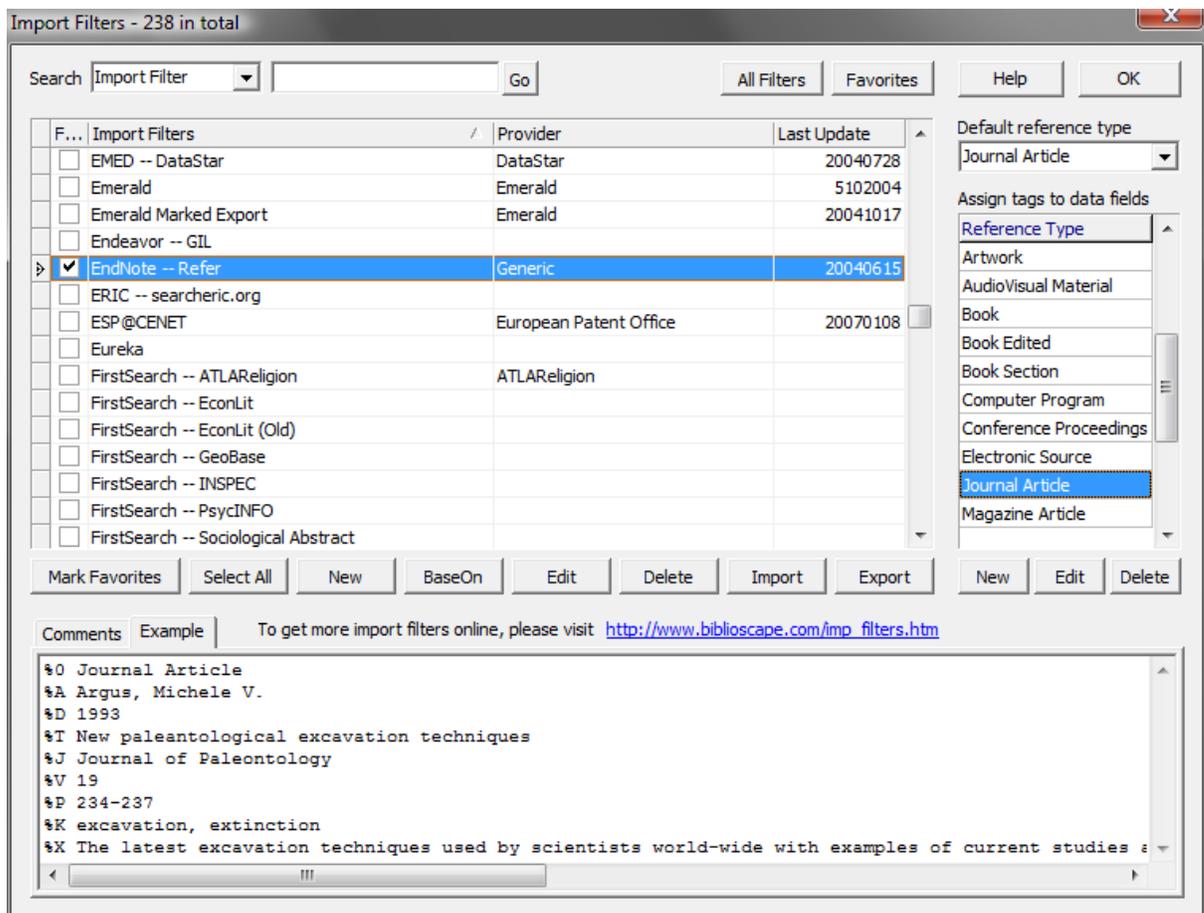
There are a few import filters for popular tagged formats like UNIX Refer, EndNote Refer, and RIS, but most import filters that come with Biblioscape are for tagged files from commercial database providers. Large information companies provide lots of databases for different disciplines. Each of these databases has its own way of using tags for its output file. The user, after completing a search, can save the results in a text file, and later import it into the Biblioscape database using the right import filter. If an import filter is not available, users can easily create a new import filter. Biblioscape encourages users to share import filters. If you want to make a contribution to the shared import filters library, please export your import filter as a \*.bif file and send it to [support@biblioscape.com](mailto:support@biblioscape.com) as an attachment. Click [here](#) to access the import filters online library.

Note: If you encounter any difficulties while making a new import filter, please send us an email at [support@biblioscape.com](mailto:support@biblioscape.com).

### 4.6.2.1 Manage import filters

Import filters are organized according to the data source. The table on the left in the following illustration shows different import filters. Each import filter can have multiple sub-filters for different reference types, because different reference types are imported into the Biblioscape database differently.

A default reference type has to be provided in case there is no import filter defined for a certain reference type. In such a case, the import filter designated as the default sub-filter would be used. The box at the bottom is for showing a sample import file and commenting about the current import filter.



### Search

You can search import filters by entering part of an import filter name, and pressing the Enter key or clicking the Go button. You can use the combo box to search against other fields like "Based On", "Category", "Comments", "Favorite", and "Last Updated". "Based On" is the name of another import filter which is current one is derived from. "Category" can be used to store any term that divides import filters into groups. "Comments" is for adding comments about an import filter. The "Favorite" field will be "T" if an import filter is marked Favorite. "Last Updated" is for storing the date of last updates in 8 digit integers. For example: Jan 22, 2009 will be stored as 20090122.

### All Filters

Clicking this button will retrieve all import filters. If you have run a search and want to list all the import filters again, you can click "All Filters" button.

### Favorite

Click this button to only show import filters marked as Favorite.

**Mark Favorites**

Mark selected import filters as Favorites. If the import filter is already marked Favorite, it will be unmarked.

**Select All**

Select all import filters in the current list. For example, if you have already run a search, Select All will only select those import filters listed as your search hits.

**New**

Create a new import filter. After clicking this button, a new window will be shown. You can then enter properties for the current import filter that are common to all sub-filters. See detailed information in the next section.

**BaseOn**

If you find an import filter that is very similar to what you want but you don't want to make changes to it in case you need the original one later, you can click the BaseOn button to create a duplicate of the current import filter. You can then work on the duplicate. After clicking on this button, user will be prompted to enter a new name for the new import filter. All the field data will be duplicated except for the "Comments" and "Example" fields. These two fields should be different for each import filter. Before clicking the BaseOn button, if the import filters list shows favorites only, click the "All Filters" button first.

**Edit**

Clicking "Edit" will open the current import filter in another window so you can edit its properties. Double clicking on an import filter has the same effect as clicking "Edit".

**Delete**

Clicking "Delete" will delete all selected import filters (hold down the Ctrl Key to select more than one record). You will be prompted first so that you can cancel the operation before deletion. When you delete an import filter, all the sub-filters under the import filter will be deleted as well.

**Import**

Biblioscape support staff keep a library of import filters at the Biblioscape support web site. They are updated regularly, so you may find some new import filters there. Although defining a new import filter is not very hard, downloading an existing one will save you time. Click "Import" button

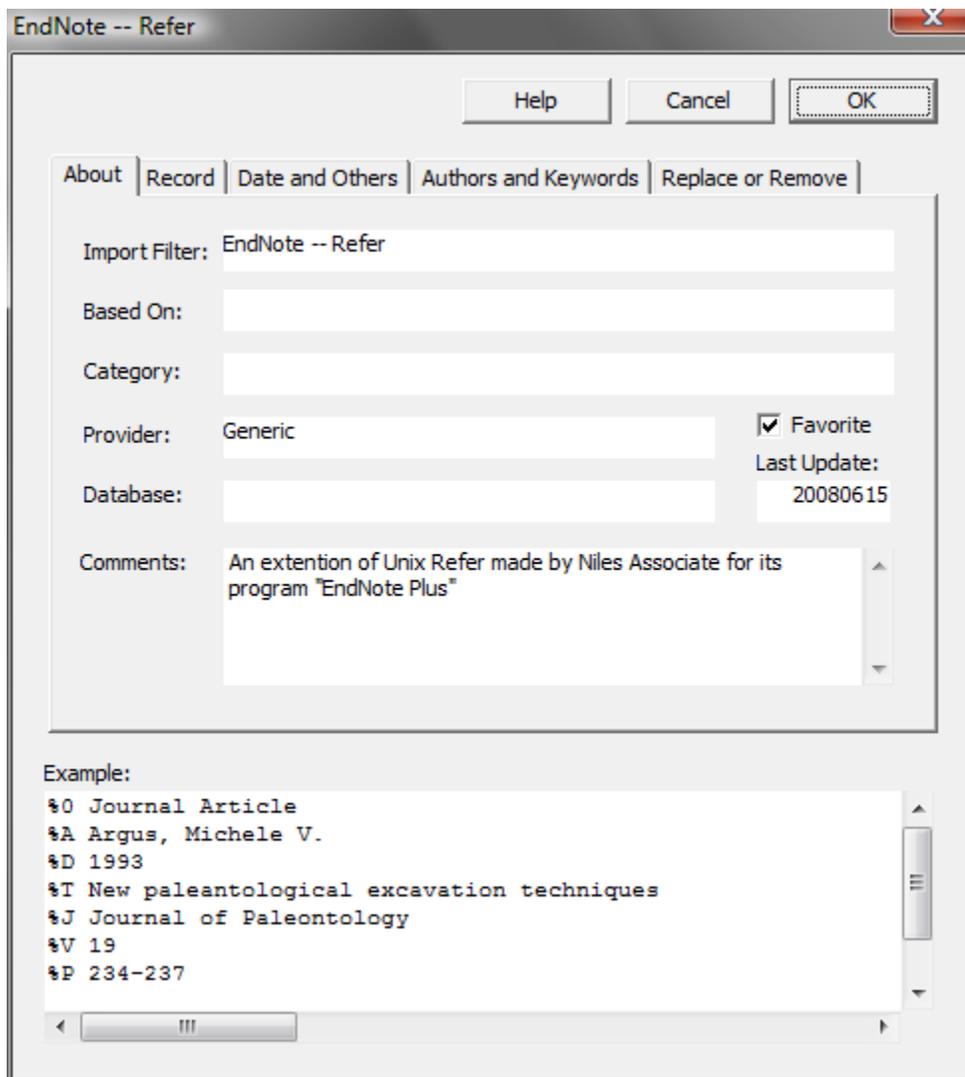
to bring up the open dialog, then select the \*.bif file you downloaded from Biblioscape web site. The import filter as well as its sub-filters for different reference types will be imported into Biblioscape. You can share import filters among colleagues through exporting and importing.

### Export

You can export selected import filters as a \*.bif file. Biblioscape will prompt you to select a folder and enter a file name. Biblioscape encourages you to share the import filters you created with other users. The Biblioscape web site allows you to deposit your filters to be downloaded by other users. Select the import filter you want to export (hold down the Ctrl key to select more than one), click on the "Export" button to bring up the save dialog and provide a file name for the exported file. The resulting file is an encrypted ASCII file containing exported import filters as well as their sub-filters for different reference types. This file can be sent to your friend by e-mail, or you can email it as an attachment to support@biblioscape.com and Biblioscape support staff will make it available at the import filter library section on our support Web site.

#### 4.6.2.2 Create an import filter

Before starting to define an import filter, first copy and paste a sample record into the "Example" field so that you can easily check format details while working on the import filter. For each import filter, there are some properties that are common to all the sub-filters such as the record separator, the way to parse author names, the date format, etc.



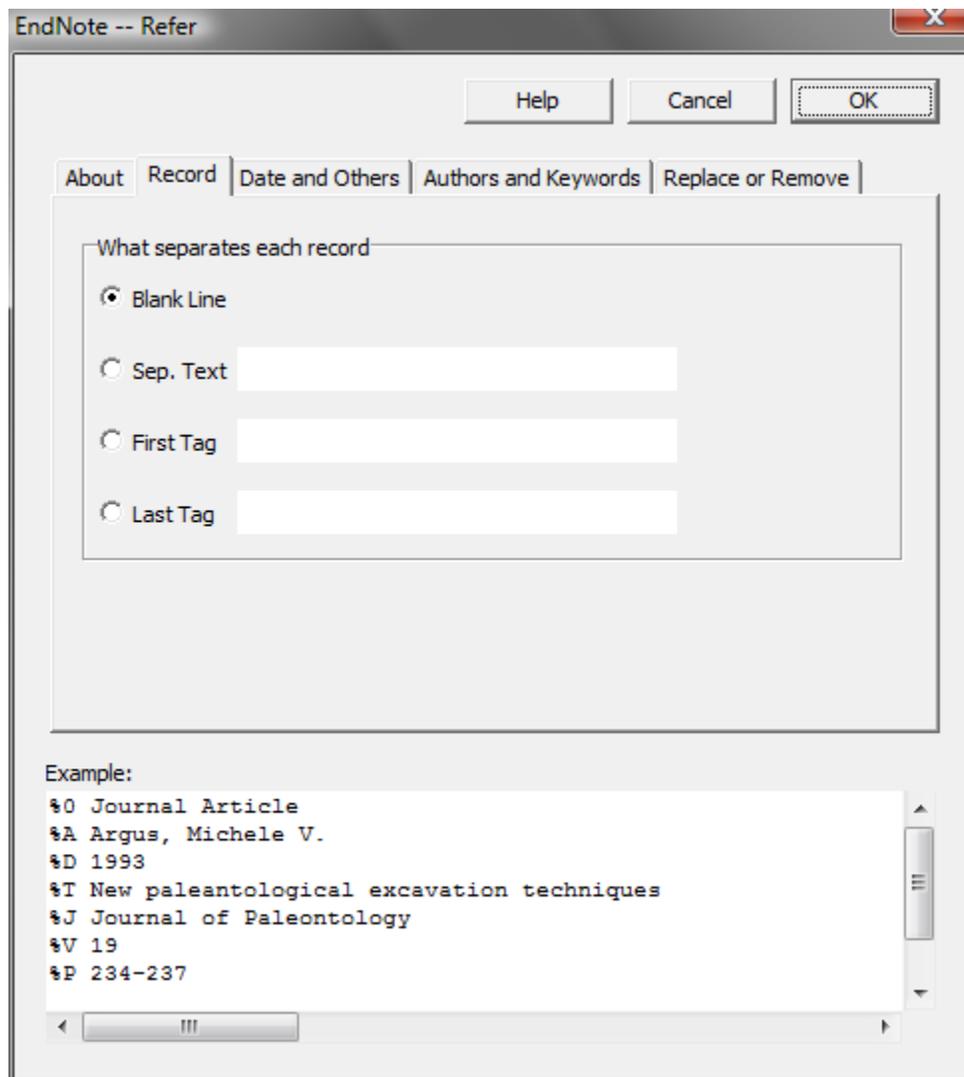
### About

- Import Filter: When creating a new import filter, give it a name using the edit box at the top.
- Based On: If the new import filter is based on an existing one, you should enter the original import filter name. If you click the BaseOn button in the Import Filters window, the "Based On" field is automatically filled.
- Category: You can tag an import filter with any categorizing scheme. For example: Life Sciences; Chemistry; etc. If there is more than one category added, separate them by a semi-colon.
- Provider: Enter the database provider name. Commercial citation databases are owned by a few companies. Enter the company name here if the import filter is made for such a

---

commercial database. If your import filter is made for a university library catalog, the university name should be entered here.

- Database: Enter the database name. Each commercial citation database usually have a well-known name such as PsycINFO. The database may be sold from one provider to another, but the database name usually does not change. The same database could also be available from more than one provider. For example, Medline database is produced by the National Library of Medicine, but it is also available from several commercial providers.
- Favorite: Check the "Favorite" box if you want to add it to the Favorite list. In the import filters window, you can easily display Favorite import filters by clicking the Favorite button.
- Last Update: Enter the date of your last update as a six digit integer. For the date January 22, 2009, 20090122 should be entered.
- Comments: Enter your notes about this import filter in the Comments field. For example, how data should be prepared for a smooth import, what data sources this import filter can be used, etc.
- Example: Always paste an example first so you can easily find out what the data looks like when designing an import filter.



## Record

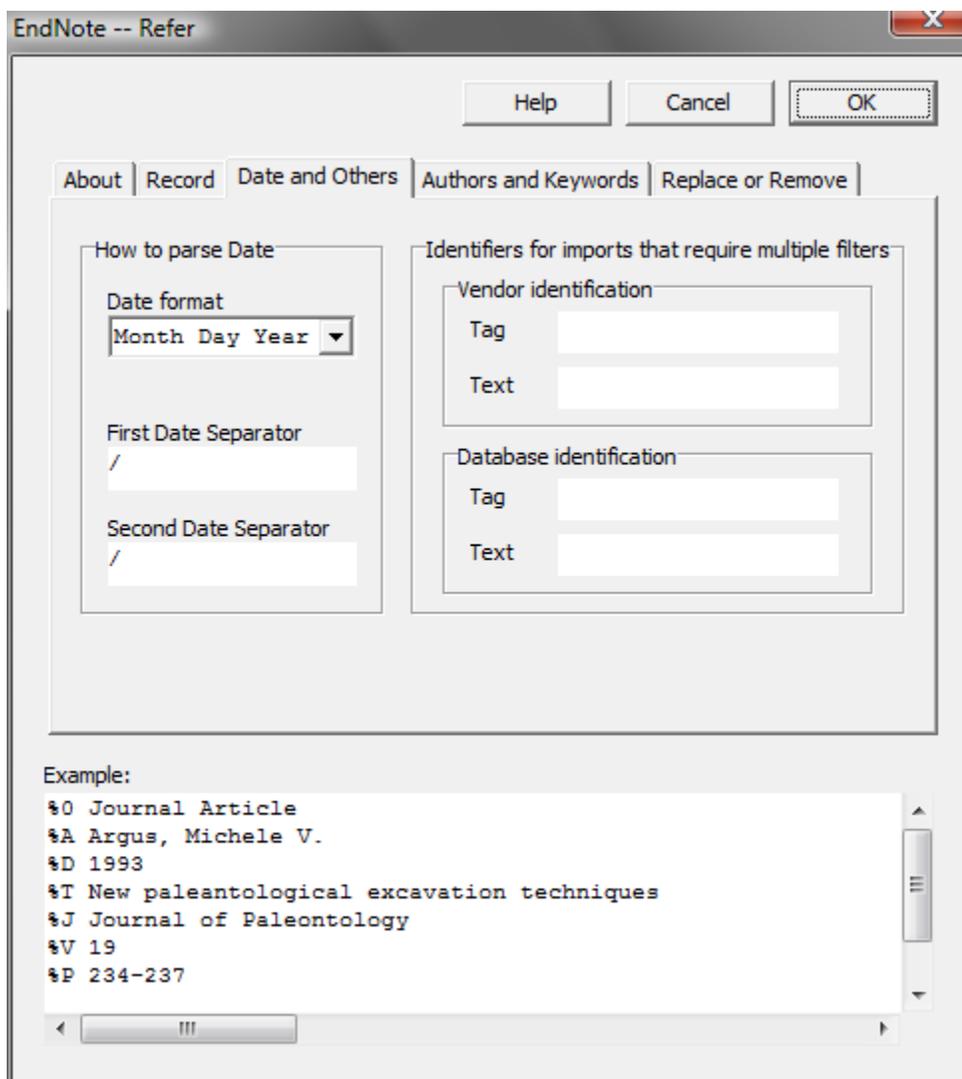
Each record in the import file has to be separated by an unique marker. This can be a blank line, special text indicating the beginning of a record, or special text indicating the end of a record.

- **Blank Line:** Each record is separated by a blank line. Biblioscape will create a new record once it reads a blank line. You should not select "Blank Line" until you are sure all records are separated by blank lines and blank lines are not present in a single record. For example, if there is a blank line inside the Abstract field, Biblioscape will treat part of the abstract as a separate record. This will cause only part of a record to be imported. If there are multiple blank lines between each record, you can still select this option.
- **Sep. Text:** If records in your file are separated by special characters or text, enter it here. For example, each record may be separated by "-----" in a line, or there may be repeated

text before every record, like "Produced by Science Data Corporation ...". If there is such at the beginning or end of each record, you can use it as the separator.

- **First Tag:** Each field in the import file should be tagged. If there is a tag field consistently placed at the top of each record, you can use this tag as a record separator. For example, Title or Authors fields are usually used as the first tag. In the screenshot shown above, if the tag "%0" is used as the first tag for every record, you can use it as the separator. Using a tag as a separator does not affect the text to be imported into a data field.
- **Last Tag:** If a tagged field appears consistently at the end of each record, you can use it as the record separator. For example, some commercial database providers put the database provider name as the last tag for each record. You can then use it as the separator and can still map this tag to a database field.

Note: When you use text to match a tag field, regular expression string can be used. To use regular expression, please put your regular expression string inside "RE(...)RE" so Biblioscape knows the regular expression engine should be used instead of simple word matching. For example, NLM PubMed uses the tag "PMID - " as the first tag, but some sites put one space before "-" and other sites put two spaces before "-". To make your import filter work for both sources, you can use regular expression RE(PMID \*- )RE as the First Tag separator. The star letter in regular expression means that the previous letter, which is a space, can be found once or many times, so the first tag in both cases will be found as a hit.



### Date and Others

How to parse Data: Specify the format of date in your import file, then put separator text between day, month and year. We recommend you select "Smart Parsing" as the Date Format unless you are sure all dates are displayed in the same format. With "Smart Parsing", Biblioscape can import the date correctly in several cases. If "Smart Parsing" is selected, there is no need to specify "First Date Separator" and "Second Date Separator".

Identifiers for imports that require multiple filters: Some information providers, like Ovid Technologies, may include records from several databases with different formats in one file. In such cases, identifiers are needed to tell Biblioscape which import filter to use. For Biblioscape import filters that support such multi-format files, vendor and database identifiers need to be added so they can match the ones used in the file from data providers like Ovid. This is how it works: When Biblioscape finds a tag that has been entered as "Vendor Identifier", it will use the

"Database Identifier" to find the import filter that matches both tags. Then, it uses the found import filter for that record, and for the next record, if a different database identifier is found, another matching import filter will be used for the next record. Here is an example of the first two lines of a file from Ovid.

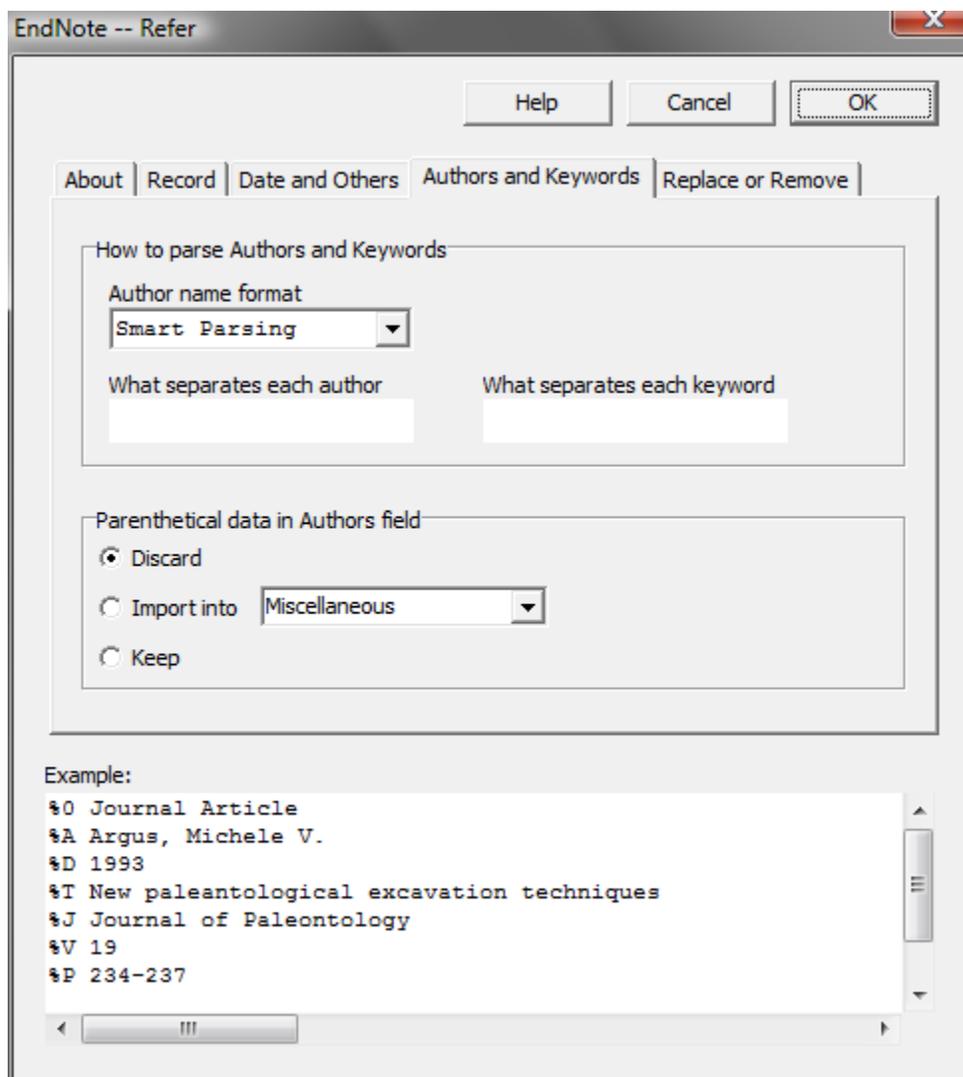
VN - Ovid Technologies

DB - MEDLINE

.....

Vendor identification: The tag that identifies the data provider should be put into the Tag box. For example: "VN - ". The data provider's name should put into the Text box. For example: "Ovid Technologies".

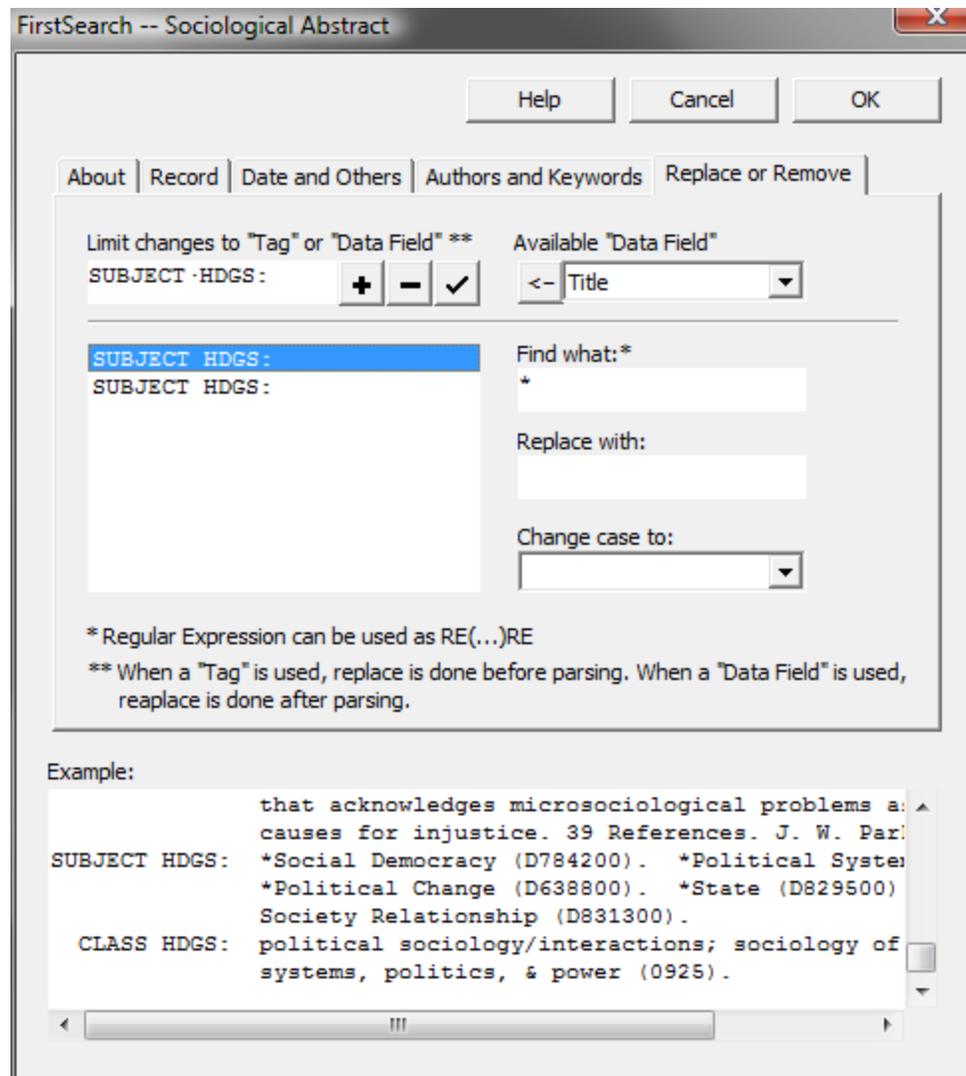
Database identification: The tag that identifies the database should be put into the Tag box. For example: "DB - ". The database name should put into the Text box. For example: "MEDLINE".



### Authors and Keywords

- Author name format: The author name could be formatted differently in different sources, so make sure you select the "Author name format" that matches the ones in your file. If there are variations in author name format, you can pick "Smart Parsing" which will work in most cases.
- What separates each author: The author field in most reference files has more than one author, so you need to specify a separator between each author in the box "What separates each author". The most popular separator used is "; ". For example: Smith, K.; Bowen, P.
- What separates each keyword: If there is more than one keyword on a line, please give the symbol that separates each keyword in box "What separates each keyword". The most common separators are "; " and ", ". For example: Nucleoside; Cancer; ...

- Parenthetical data in "Authors" field: Some citation database providers put author related data inside a parenthesis next to the author name. The most common data are author's role, date of birth, etc. For example: Smith, K. (1945-). You can choose to discard the text, import it into another data field, or keep it as is. If you decide to keep the text along with parenthesis, there is no need to worry about this messing up your formatted citations and bibliography. Biblioscape will ignore text inside parenthesis when generating formatted authors.



### Replace or Remove

The import file may contain some characters you want to remove or replace. For example, DIALOG search results will put "|" at the end of each data field. To remove this unwanted character, you have to type the field tag into the "Limit changes to Field or Tag" box, then enter "|" in "Find what" box and leave the "Replace with" box blank.

You can also change the case of imported text to "Title case", "Sentence case", "Lower case", or "Upper case". You can limit the "Replace or Remove" operation to a tag field or to a data field; a tag field means the text after a tag in the import file. For example: "AU: Smith, K.; Bowen, P." is a tag field. To limit the "Replace or Remove" operation to a tag field, you have to type the tag into the edit box. A data field means the text of a data field in your database. To limit the "Replace or Remove" operation to a data field, you can select the "Data Field" on the right and click the left arrow button. If you limit the changes to a tag field, the "Replace and Remove" operation will be applied before the data is parsed. If you limit the changes to a data field, the "Replace and Remove" operation will be applied after the data is parsed by the import filter. When importing one tag field into multiple data fields, it is better to limit "Replace or Remove" to a data field instead of a tag field, such as when importing the following text:

JN: Journal-of-Public-Policy; 1985, 5, 133-153.

The "-" has to be replaced by a space " " if you limit the "Replace and Remove" operation to tag field "JN: "; the hyphen "-" between start page and end page will be replaced also. It is better to limit the "Replace and Remove" operation to data field "Journal, Book, etc." which can be selected from the combo box on the right. Click the arrow button to move the selected data field "Limit changes..." box.

If you want to insert text into a field during import, leave the "Find what:" edit box blank and type the words you want to insert into the "Replace with:" edit box. The text will be inserted at the end of the field. If you put "^" at the beginning of the text in the "Replace with:" edit box, the text will be inserted at the beginning of the field. For example, you may want to insert words "Found in library" to the end of field "Custom 1" for all the records you want to import. Then, just limit the changes to the "Custom 1" data field, leave the "Find what:" box blank and enter "Found in library" to the "Replace with:" field.

#### Note

To find what text should be replaced or removed, regular expression string can be used. To use regular expression, please put your regular expression string inside "RE(...)RE" so Biblioscape knows the regular expression engine should be used instead of simple word matching. The real power lies in the use of regular expression. If you know regular expression, you can use it to pre-process a tag field with powerful pattern matching and make some seemingly impossible things happen.

#### Multiple Lines

If the text of a tagged field takes more than one line, Biblioscape will combine all the lines

according to the following rule: If the tagged field is "Authors" or "Keywords", the lines will first be trimmed then joined by "; ". For other fields, the lines will first be trimmed then joined by " ".

When making an import filter, you have to take multiple line trimming issues into consideration such as when designing an import filter for the following tagged field:

```
AU Kurita Y. Masuda H. Suzuki K. Fujita K.  
Kawabe K.
```

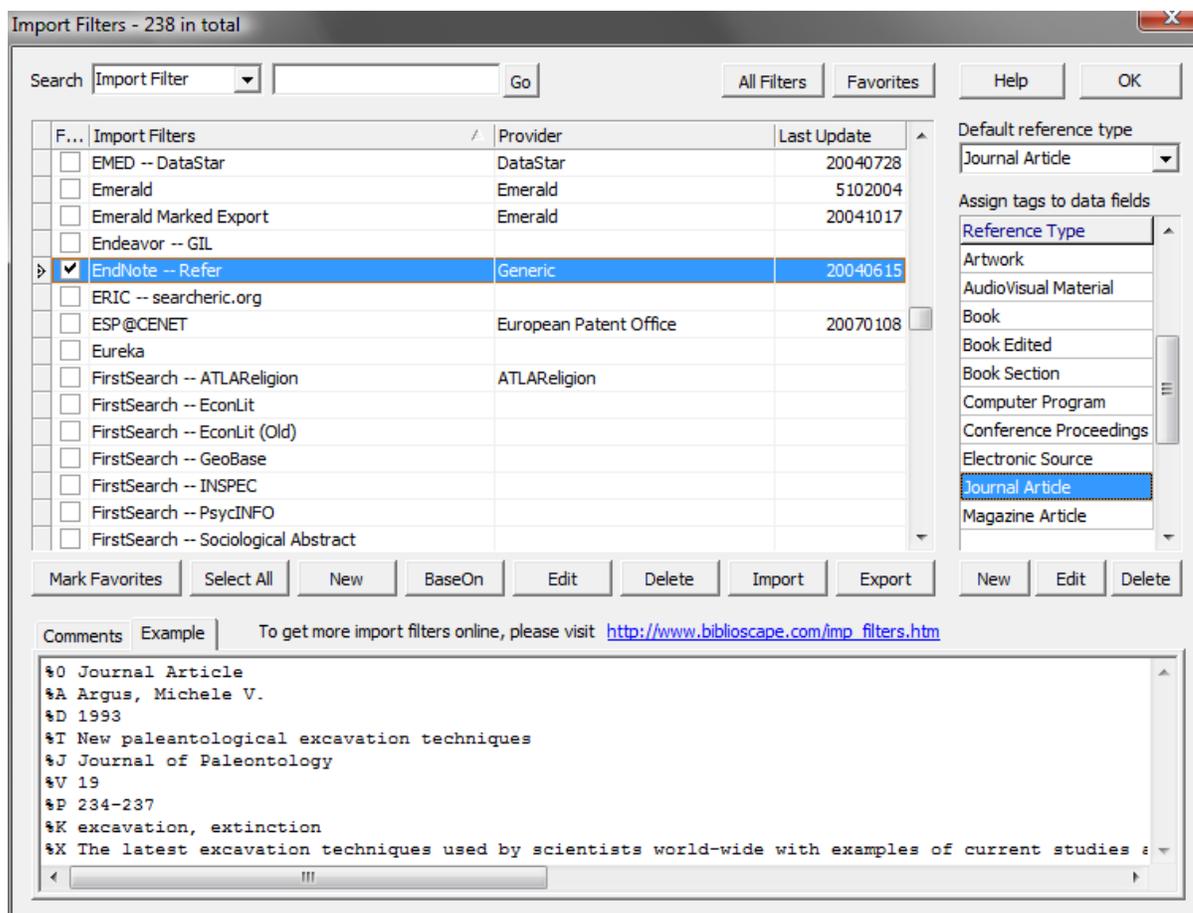
The second line will be trimmed automatically by Biblioscape and combined with the first one by "; ", so the final text will look like:

```
AU Kurita Y. Masuda H. Suzuki K. Fujita K.; Kawabe K.
```

You should use "Find & Replace" to replace " " in tag field "AU " to "; " and use "; " to separate individual author.

#### 4.6.2.3 Create a sub-filter

The export files from commercial citation database providers have different formats for each reference type. For example, a journal article has a journal name, volume, and issue data that is not present for a book reference. For popular bibliographic record exchange formats like Refer and BibTeX, different tags are used for each reference type. That is why Biblioscape depends on reference type specific sub-filters to understand how each type of reference should be imported. To make a Biblioscape import filter function, you have to create at least one sub-filter.



### New

Under the sub-filters list on the right pane, click the "New" button to create a new reference type specific sub-filter. Biblioscape will add an item "Select from the list" to your sub-filter list. Click on the text "Select from the list", and a drop down arrow will be shown on the right. Click on the arrow and select a reference type from the drop down list. If this is the first sub-filter you have created, all the properties will be blank. If this is not the first sub-filter, Biblioscape will inherit all sub-filter properties from the one you selected before clicking the New button. This will save you some work. Because lots of the properties are common among different sub-filters, you only need to edit the different parts when creating subsequent sub-filters. Because of this inheritance feature, you need to be careful which sub-filter is selected before you click the "New" button. If you want to create a sub-filter for reference type "Book Edited", and you already have two sub-filters created for "Book" and "Journal Article", you should select the sub-filter "Book" before clicking the New button, because "Book Edited" will have more common properties with "Book" than with "Journal Article". To start working on the new sub-filter, click the Edit button or double click the sub-filter itself.

### Edit

Clicking the Edit button will bring up the sub-filter edit window, so you can change the properties.

Double clicking a sub-filter will have the same effect as clicking the Edit button.

### Delete

Click the "Delete" button to delete all the selected sub-filters. You will be prompted before the deletion. To select more than one sub-filter, hold down the Ctrl key and select.

### Default reference type

It is likely an import filter will not cover all the possible reference types present in an import file. There may be some reference types that rarely appear in a file. There are also some unexpected reference types that are not even present in your database settings, so you need to select a reference type as the default one to deal with those records. Biblioscape will use the default sub-filter to parse the record when no matching sub-filter can be found.

Reference type: Journal Article  
Matching text: Journal-Article

Match Fields | Complex Fields | Exclude Fields

Map tag fields to data fields, Regular Expression can be used as RE(...)RE      Match field to more than one tag +

Isbn	
Label	
Keywords	MJ: ^ [+ ] ^MN:
Memo	
Availability	
Location	
Address	AF:
Language	LA:
Country	LO:

Example:

```
MJ: *Age-Differences; *Cognitive-Development; *Computer-Games;
*Individual-Differences
MN: Choice-Behavior; Decision-Making; Inference-; Learning-; Logical-Thinking;
Methodology-; Reasoning-; Thinking-
CC: 2820-Cognitive-and-Perceptual-Development; 2820; 28
PO: Human
AG: Childhood; School-Age
LO: United-Kingdom
PT: Empirical-Study
SF: References; Peer-Reviewed
UD: 20020417
```

Now we will cover the sub-filter edit window. This window is used to edit the parsing parameters for each reference type. The table on the left lists all available data fields for the current reference type. You have to provide the tag for each data field. The first and most important property to set is the reference type matching text. The text you entered below the "Matching text" label is used

by Biblioscape to decide which sub-filter is to be used. On the "Match Fields" tab, you need to enter a tag in the first row "Reference Type". When the Biblioscape import engine sees this tag in the import file, it will check the text after this tag. If the text matches the one you entered inside the "Matching text" edit box, it will use this sub-filter. Each sub-filter's name is the reference type name. In the above example, if Biblioscape found the text "Journal Article" after the tag "%0 ", the sub-filter for Journal Article will be used. If there is no reference type tag field entered, Biblioscape will not be able to tell which sub-filter to use. The default sub-filter you set in the import filters window will be used for all the records instead.

### Match Fields

---

There are two columns in the fields matching list. The first one is the reference type. The second one is the fields tag found in the import file. In the above example, the field tag "LA:" is mapped to the database field "Language". If Biblioscape found tag "LA:" in the import file, it will put all the text after the tag "LA:" into the database Language field. For some files, you may want to put text from two tag fields into a single database field. In the above screenshot, if you want to put the keywords text after the tag "MJ:" as well as the text after the tag "MN:" into the database Keywords field, you can type the tag "MJ:" first, then click the "+" button after the label "Match field to more than one tag". Biblioscape will insert the text "^+[ ]^" after "MJ:". You can then enter "MN:". If you do not wish to use the "+" button, you can type the tag separator "^+[ ]^" directly.

### Regular expression

Again, if you know regular expression, it will increase the pattern matching power by several folds. You should put your regular expression text inside RE(...)RE. For example, when you want to map the tag "AU - " to the Authors field, AU may be followed by one or more spaces. You can use the following regular expression in such a case: RE(AU \*- )RE. The asterisk tells Biblioscape: no matter how many spaces are found between "AU" and "-", treat this as a tag. To use regular expression to solve the problem in the previous section, you can type RE(MJ:|MN:)RE. The "|" sign tells Biblioscape that both "MJ:" and "MN:" should be treated as a tag.

### Insert static text

FirstSearch -- PsycINFO

Reference type: Journal Article  
Matching text: Journal Article

Match Fields | Complex Fields | Exclude Fields

Map tag fields to data fields, Regular Expression can be used as RE(...)RE      Match field to more than one tag +

Custom 5	
Custom 6	
Custom 7	
Custom 8	<[Date of entry: ]>Entry:
Custom Date	
Custom Number	
Abstract	Abstract:
Document	
Priority	

Example:

```

Outpatients
Predisposition
Psychiatric Patients
Test Reliability
Identifier: psychometric properties of White Bear Suppression Inventory &
its association with dimensional & categorical measures of psychopathology & proneness t
psychiatric outpatients
Population: Human; Male; Female; Outpatient; Adulthood (18 yrs & older); Thirties (30-39
Class Code: 2224; 3200
Document Type: Journal Article
Content Type: Empirical Study
Entry: 19991001
Accession No: 1999-03977-007

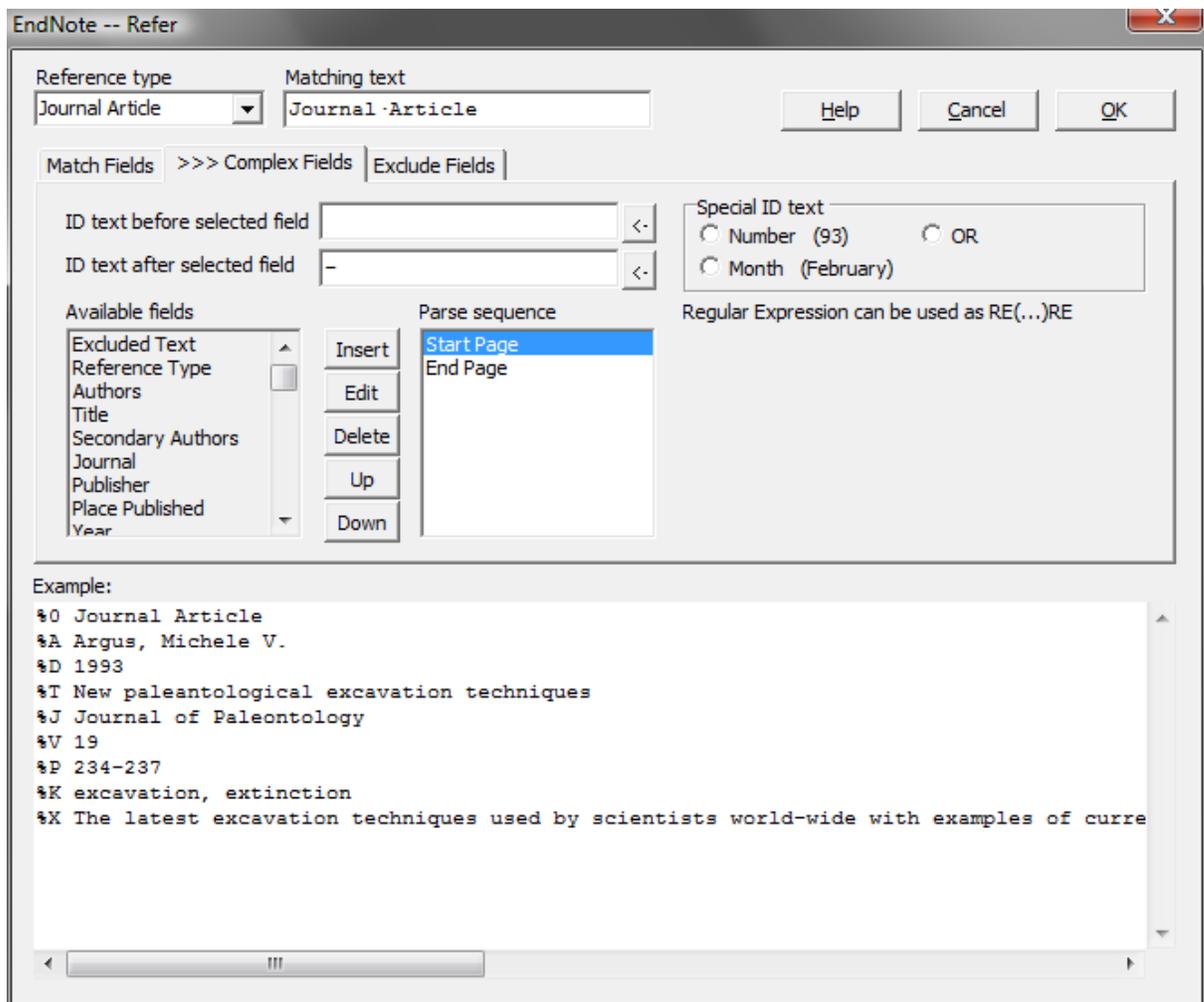
```

Some tag fields do not have corresponding database fields in Biblioscape. You may have to map them to one of the custom fields in the Biblioscape database, or to the Miscellaneous field which can take almost unlimited amounts of data. In such cases, you may want to insert some text before or after the imported tag field data. For example, if the tag field is: "Entry: 19991001" and you mapped it to the custom 8 field, only the text "19991001" will be imported into the database field "Custom 8". The tag "Entry: " will not be imported because it is a tag. If you want to add some text to remind you what the data is about, you can add "<[Date of entry: ]>" to the matching text field; next to "Custom 8", you will have "<[Date of entry: ]>Entry:" as the matching text. When Biblioscape sees the line "Entry: 19991001", it will put "19991001" into the Custom 8 database field, and add "Date of entry: " before that. The Custom 8 field data after the import will become: "Date of entry: 19991001". If you want to insert the static text after the imported text, you should use: Entry:[<: date of entry>]. The Custom 8 field data after the import will become: "19991001: date of entry". The rule is: use [<...>] to make it appear before the imported text, and use [<...>] to make it appear after the imported text.

### Complex Fields

---

So far, we have covered simple, straight forward tag field / data field mapping. Now, let's see how to map one tag field to several data fields. Lots of commercial citation database providers put journal name, year, volume, issue, and pages after a single tag field. For example: "SO: Educational-Psychology. 2002 Mar; Vol 22(2): 219-233". You should enter the tag "SO: " as the matching text for Journal, Year, Volume, Issue, Page Start, and Page End fields. Then click the "Complex Fields" tab and drag data fields from the "Available fields" list to the "Parse sequence" list. You should arrange them in the same order as the data appeared. Next you need to select the data fields in the "Parse sequence" list one by one and enter the identification text before and after it so Biblioscape knows where each field starts and ends. Lets use a simple example to explain this. In the above screenshot, only two data fields are included. The tag field looks like "%P 234-237". For the "Start Page" field, there is no need to put anything in the box "ID text before selected field" because there is no text before the "Start Page". Type "-" in the box "ID text after selected field". That tells where the start page ends. Then click on "End Page", and put "-" in the box "ID text before selected field". This tells where the End Page starts. Leave the box "ID text after selected field" blank since there is no more data after End Page.



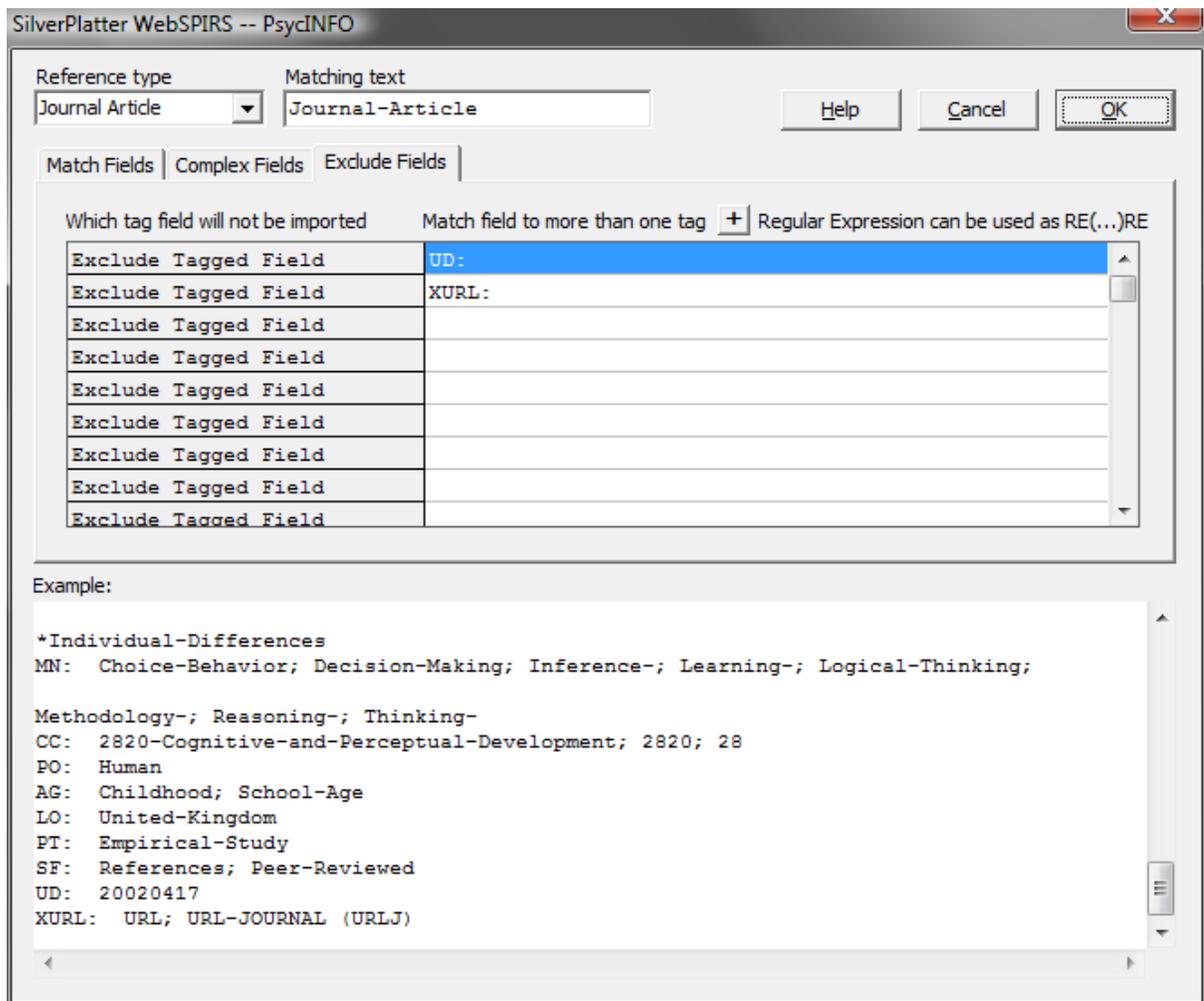
### Special ID text

Sometimes the identification text between each data field cannot be expressed by simple text matching. For example, if month texts consistently appears before the publication year, and there is no other good identifier to use between publication year and the previous data, you can select "Month" and click the arrow button. The text "`^[month]^`" will be inserted into the ID text field.

- Number (93): "`^[number]^`" will be used to match any integer.
- OR: "`^[OR]^`" will be inserted into the ID text field. You should put it between two matching texts. For example, book editors will be followed by "ed. " if there is only one editor, and "eds. " if there are several editors. You can put OR relationships in between to make it look like: "ed. `^[OR]^`eds. ".
- Month (February): "`^[month]^`" will be used to match any month in the text. For example: January, February, ...".

## Exclude Fields

Citation database providers may include tag fields that you don't need. Even if you don't want to import those tag fields, you still need to handle them in the import filter. Enter those tags in the "Exclude Fields" list, and when Bibloscape sees these tags, they will be removed. If they are not included in the "Exclude Fields" list, Bibloscape will treat it as part of the previous tag field.



## Regular expression

If you know regular expression, there is no need to use special ID text, because regular expression is many times more powerful. When using regular expression, put your regular expression string inside "RE(...)RE". You can exploit many opportunities that are not available using simple text matching. You can use regular expression to match field tags, exclude field tags, or for matching ID texts in complex fields. For example, if the "Authors" tag changes between two data providers and one uses "Authors: ", while the other uses "Author(s) : ", you can use the following regular expression as the matching text: RE(Author.\*: )RE. Inside the RE quotes, ".\*" means match any

text from zero to n letters.

#### 4.6.2.4 Use Regular Expression

Most people are not familiar with regular expression. You probably have never heard of the term. So what is regular expression? Regular expression is a way to describe patterns in text. When you use a word processor, you go to menu command "Edit | Find" to search for text in the document. You type in the word and do the search. But what if you need to define a more complex search than a simple word matching? For example, you may want to find all the dates written in the yyyy-mm-dd format. Regular expression is the perfect tool for these searches. Regular expression syntax is somewhat difficult to learn, but once you master the skill, it will benefit you for life because regular expression is implemented in a lot of tools like Perl, PHP, Unix, JavaScript, and even some word processors. Here are a few simple examples to show you how regular expression can be used.

- `^The`: matches any string that starts with "The"
- `ab*`: matches a string that has an "a" followed by zero or more b's ("a", "ab", "abbb", etc.)
- `ab{3,5}`: from three to five b's ("abbb", "abbbb", or "abbbbb")
- `hi|hello`: matches a string that has either "hi" or "hello" in it
- `a.[0-9]`: matches a string that has an "a" followed by one character and a digit
- `^[a-zA-Z]`: a string that starts with a letter

#### Why regular expression support is added to Biblioscape

Since regular expression is not well know and a little hard to learn, you may ask why it is added to Biblioscape. The number one reason is: Biblioscape needs a powerful pattern matching tool for the import filters. Biblioscape uses import filters to map tagged fields in the import file to data fields in Biblioscape database. The existing tag matching is done by simple word search. Although it is adequate in most cases, there are times when a more powerful tool is desired, especially when the data provider doesn't follow a strict rule when displaying a record. With regular expression in our arsenal, we can not only tackle those cases with ease; it opens up possibilities for import files that were considered impossible in the past. The power of regular expression will be realized gradually in this area. Besides import filter design, regular expression support is also added to the "Find and Replace" window in the References module. Although you only know the basics of regular expression, you can now make the Find and Replace feature much more powerful than before.

#### Regular expression engine

A regular expression "engine" is a piece of software that can process regular expressions and try to

match the pattern to the given string. Usually, the engine is part of a larger application. Just like in Biblioscape, regular expression is invoked when needed. Biblioscape will make sure the right regular expression is applied to the right data. As usual in the software world, different regular expression engines are not fully compatible with each other. In the world of regular expression, Perl 5 implementation is the most popular one. Although other implementations are not identical, they are very similar. It should not be a concern for regular users. The one implemented in Biblioscape is from [regexpstudio.com](http://regexpstudio.com).

### Simple matches

---

Any single character matches itself, unless it is a metacharacter with a special meaning described later. A series of characters matches that series of characters in the target string, so the pattern "bluh" would match "bluh". When used in this way, it functions the same way as a simple word matching tool. You can cause characters that normally function as metacharacters or escape sequences to be interpreted literally by 'escaping' them by preceding them with a backslash "\", for instance: metacharacter "^" match beginning of string, but "\\^" match character "^", "\\\" match "\" and so on.

Examples:

foobar matches string 'foobar'

\\^FooBarPtr matches '^FooBarPtr'

### Escape sequences

---

Characters may be specified using an escape sequences syntax much like that used in C and Perl: "\\n" matches a newline, "\\t" a tab, etc. More generally, "\\xnn", where nn is a string of hexadecimal digits, matches the character whose ASCII value is nn. If you need wide (Unicode) character code, You can use '\\x{nnnn}', where 'nnnn' - one or more hexadecimal digits.

\\xnn char with hex code nn

\\x{nnnn} char with hex code nnnn (one byte for plain text and two bytes for Unicode)

\\t tab (HT/TAB), same as \\x09

\\n newline (NL), same as \\x0a

\\r carriage return (CR), same as \\x0d

\\f form feed (FF), same as \\x0c

\\a alarm (bell) (BEL), same as \\x07

\\e escape (ESC), same as \\x1b

Examples:

foo\\x20bar matches 'foo bar' (note space in the middle)

`\tfoobar` matches 'foobar' predefined by tab

### Character classes

---

You can specify a character class by enclosing a list of characters in `[]`, which will match any one character from the list. If the first character after the `"["` is `"^"`, the class matches any character not in the list.

Examples:

`foob[aeiou]r` finds strings 'foobar', 'foober' etc. but not 'foobbr', 'foobcr' etc.

`foob[^aeiou]r` find strings 'foobbr', 'foobcr' etc. but not 'foobar', 'foober' etc.

Within a list, the `"-"` character is used to specify a range, so that `a-z` represents all characters between `"a"` and `"z"`, inclusive. If You want `"-"` itself to be a member of a class, put it at the start or end of the list, or escape it with a backslash. If You want `']'` you may place it at the start of list or escape it with a backslash.

Examples:

`[-az]` matches 'a', 'z' and '-'

`[az-]` matches 'a', 'z' and '-'

`[a\^-z]` matches 'a', 'z' and '-'

`[a-z]` matches all twenty six small characters from 'a' to 'z'

`[\n-\x0D]` matches any of `#10,#11,#12,#13`.

`[\d-t]` matches any digit, '-' or 't'.

`[]-a]` matches any char from `']'..'a'`.

### Metacharacters - line separators

---

`^` start of line

`$` end of line

`\A` start of text

`\Z` end of text

`.` any character in line

Examples:

`^foobar` matches string 'foobar' only if it's at the beginning of line

`foobar$` matches string 'foobar' only if it's at the end of line

`^foobar$` matches string 'foobar' only if it's the only string in line

`foob.r` matches strings like 'foobar', 'foobbr', 'foob1r' and so on

The "^" metacharacter by default is only guaranteed to match at the beginning of the input string/text, the "\$" metacharacter only at the end. Embedded line separators will not be matched by "^" or "\$". You may, however, wish to treat a string as a multi-line buffer, such that the "^" will match after any line separator within the string, and "\$" will match before any line separator. You can do this by switching On the modifier /m.

The \A and \Z are just like "^" and "\$", except that they won't match multiple times when the modifier /m is used, while "^" and "\$" will match at every internal line separator. The "." metacharacter by default matches any character, but if You switch Off the modifier /s, then '.' won't match embedded line separators.

Note: When used in Biblioscape import filter, the line separator doesn't apply because Biblioscape reads one line at a time and send it to regular expression engine for processing if it finds "RE(...) RE". When used in "Edit | Find" or "Edit | Replace", the line separator does apply when working against memo fields like Notes, Abstract, Keywords, Miscellaneous.

#### Metacharacters - predefined classes

---

\w an alphanumeric character (including "\_")

\W a nonalphanumeric

\d a numeric character

\D a non-numeric

\s any space (same as [ \t\n\r\f])

\S a non space

You may use \w, \d and \s within custom character classes.

Examples:

foob\dr matches strings like 'foob1r', 'foob6r' and so on but not 'foobar', 'foobbr' and so on

foob[\w\s]r matches strings like 'foobar', 'foob r', 'foobbr' and so on but not 'foob1r', 'foob=r' and so on

#### Metacharacters - word boundaries

---

\b Match a word boundary

\B Match a non-(word boundary)

A word boundary (\b) is a spot between two characters that has a \w on one side of it and a \W on the other side of it (in either order), counting the imaginary characters off the beginning and end of the string as matching a \W.

The use of boundary meta characters works like whole word search in a word processor. For example, searching for the word "the" can be done using the regular expression `\bthe\b`. This specifies that we are searching for "the" with no letters on each side of it (i.e. with a word boundary on each side).

### Metacharacters - iterators

---

Any item of a regular expression may be followed by another type of metacharacters - iterators. Using this metacharacters you can specify the number of occurrences of the previous character, metacharacter or subexpression.

- \* zero or more ("greedy"), similar to `{0,}`
- + one or more ("greedy"), similar to `{1,}`
- ? zero or one ("greedy"), similar to `{0,1}`
- `{n}` exactly n times ("greedy")
- `{n,}` at least n times ("greedy")
- `{n,m}` at least n but not more than m times ("greedy")
- \*? zero or more ("non-greedy"), similar to `{0,}?`
- +? one or more ("non-greedy"), similar to `{1,}?`
- ?? zero or one ("non-greedy"), similar to `{0,1}?`
- `{n}?`  exactly n times ("non-greedy")
- `{n,}?`  at least n times ("non-greedy")
- `{n,m}?`  at least n but not more than m times ("non-greedy")

So, digits in curly brackets of the form `{n,m}`, specify the minimum number of times to match the item n and the maximum m. The form `{n}` is equivalent to `{n,n}` and matches exactly n times. The form `{n,}` matches n or more times. There is no limit to the size of n or m, but large numbers will chew up more memory and slow down regular expression execution.

If a curly bracket occurs in any other context, it is treated as a regular character.

Examples:

`foob.*r` matchs strings like 'foobar', 'foobalkjdfkjkj9r' and 'foobr'

`foob.+r` matchs strings like 'foobar', 'foobalkjdfkjkj9r' but not 'foobr'

`foob.?r` matchs strings like 'foobar', 'foobbr' and 'foobr' but not 'foobalkj9r'

`fooba{2}r` matchs the string 'foobaar'

`fooba{2,}r` matchs strings like 'foobaar', 'foobaaar', 'foobaaaar' etc.

`fooba{2,3}r` matchs strings like 'foobaar', or 'foobaaar' but not 'foobaaaar'

### Greedy and nongreedy matching in a regular expression

By default, pattern matching is greedy, which means that the matcher returns the longest match possible. For example, applying the pattern `A.*c` to `AbcAbcA` matches `AbcAbc` rather than the shorter `Abc`. To do nongreedy matching, a question mark must be added to the quantifier. For example, the pattern `A.*?c` will find the shortest match possible. You can switch all iterators into "non-greedy" mode (see the modifier `/g`).

### Metacharacters - alternatives

---

You can specify a series of alternatives for a pattern using `|` to separate them, so that `fee|fie|foe` will match any of "fee", "fie", or "foe" in the target string (as would `f(e|i|o)e`). The first alternative includes everything from the last pattern delimiter ("`(`", "`[`", or the beginning of the pattern) up to the first `|`, and the last alternative contains everything from the last `|` to the next pattern delimiter. For this reason, it's common practice to include alternatives in parentheses, to minimize confusion about where they start and end.

Alternatives are tried from left to right, so the first alternative found for which the entire expression matches, is the one that is chosen. This means that alternatives are not necessarily greedy. For example: when matching `foo|foot` against "barefoot", only the "foo" part will match, as that is the first alternative tried, and it successfully matches the target string. (This might not seem important, but it is important when you are capturing matched text using parentheses.) Also remember that `|` is interpreted as a literal within square brackets, so if you write `[fee|fie|foe]` you're really only matching `[feio]`.

Examples:

`foo(bar|foo)` matches strings 'foobar' or 'foofoo'.

### Metacharacters - subexpressions

---

The bracketing construct `( ... )` may also be used to define regular expression subexpressions. Subexpressions are numbered based on the left to right order of their opening parenthesis. First subexpression has number '1' (whole regular expression match has number '0').

Examples:

`(foobar){8,10}` matches strings which contain 8, 9 or 10 instances of the 'foobar'

`foob([0-9]+)r` matches 'foob0r', 'foob1r', 'foobar', 'foobaar', 'foobaar' etc.

### Metacharacters - backreferences

---

Metacharacters `\1` through `\9` are interpreted as backreferences. `\<n>` matches previously matched subexpression `#<n>`. Back-references are parts of a regular expression that are in

parentheses. They are counted in order in which they appear. For example, consider regular expression `a((b)+)c`. Backreference 0 is the whole expression. Backreference 1 is `(b)+` and backreference 2 is `b`. If matching text is `abbbbcdd`, then backref 0 is `abbbbc` (matching part), backref 1 is `bbbb`, backref 2 is `b`. Easy, isn't it?

Examples:

`(.)\1+` matches 'aaaa' and 'cc'.

`(.+)\1+` also match 'abab' and '123123'

`(["']?)(\d+)\1` matches "'13" (in double quotes), or '4' (in single quotes) or 77 (without quotes) etc

### Modifiers

Modifiers are for changing the behaviour of regular expression. There are many ways to set up modifiers. Any of these modifiers may be embedded within the regular expression itself using the `(?...)` construct.

- `i`: Do case-insensitive pattern matching (using installed in you system locale settings), see also `InvertCase`.
- `m`: Treat string as multiple lines. That is, change `"^"` and `"$"` from matching at only the very start or end of the string to the start or end of any line anywhere within the string, see also `Line separators`.
- `s`: Treat string as single line. That is, change `"."` to match any character whatsoever, even a line separators (see also `Line separators`), which it normally would not match.
- `g`: Non standard modifier. Switching it Off You'll switch all following operators into non-greedy mode (by default this modifier is On). So, if modifier `/g` is Off then `'+'` works as `'+?'`, `'*'` as `'*?'` and so on
- `x`: Extend your pattern's legibility by permitting whitespace and comments (see explanation below).

The modifier `/x` itself needs a little more explanation. It tells the regular expression engine to ignore whitespace that is neither backslashed nor within a character class. You can use this to break up your regular expression into (slightly) more readable parts. The `#` character is also treated as a metacharacter introducing a comment.

Example:

```
(
(abc) # comment 1
| # You can use spaces to format r.e. - TRegExpr ignores it
```

```
(efg) # comment 2  
)
```

This also means that if you want real whitespace or # characters in the pattern (outside a character class, where they are unaffected by /x), that you'll either have to escape them or encode them using octal or hex escapes. Taken together, these features go a long way towards making regular expressions text more readable.

### Perl extensions

```
(?imsxr-imsxr)
```

You may use it into regular expression for modifying modifiers by the fly. If this construction inlined into subexpression, then it effects only into this subexpression.

Examples:

```
(?i)Saint-Petersburg matches 'Saint-petersburg' and 'Saint-Petersburg'  
(?i)Saint-(?-i)Petersburg matches 'Saint-Petersburg' but not 'Saint-petersburg'  
(?i)(Saint-)?Petersburg matches 'Saint-petersburg' and 'saint-petersburg'  
((?i)Saint-)?Petersburg matches 'saint-Petersburg', but not 'saint-petersburg'
```

```
(?#text)
```

A comment, the text is ignored. Note that TRegExpr closes the comment as soon as it sees a ")", so there is no way to put a literal ")" in the comment.

## 4.6.3 Exporting references

You may need to share bibliographic data with other users who don't use Bibioscape, or you may want to switch from Bibioscape to another software that can serve your needs better. Bibioscape provides easy ways for users to export data in many formats.

- For exporting to other bibliographic software, Bibioscape lets you export references in popular formats like EndNote Refer and Reference Manger RIS formats. These two formats are widely supported by almost all bibliographic software.

Export to EndNote and Reference Manager

- If you have special needs, you can use the built-in style editor to create a custom style and use this style to export records.

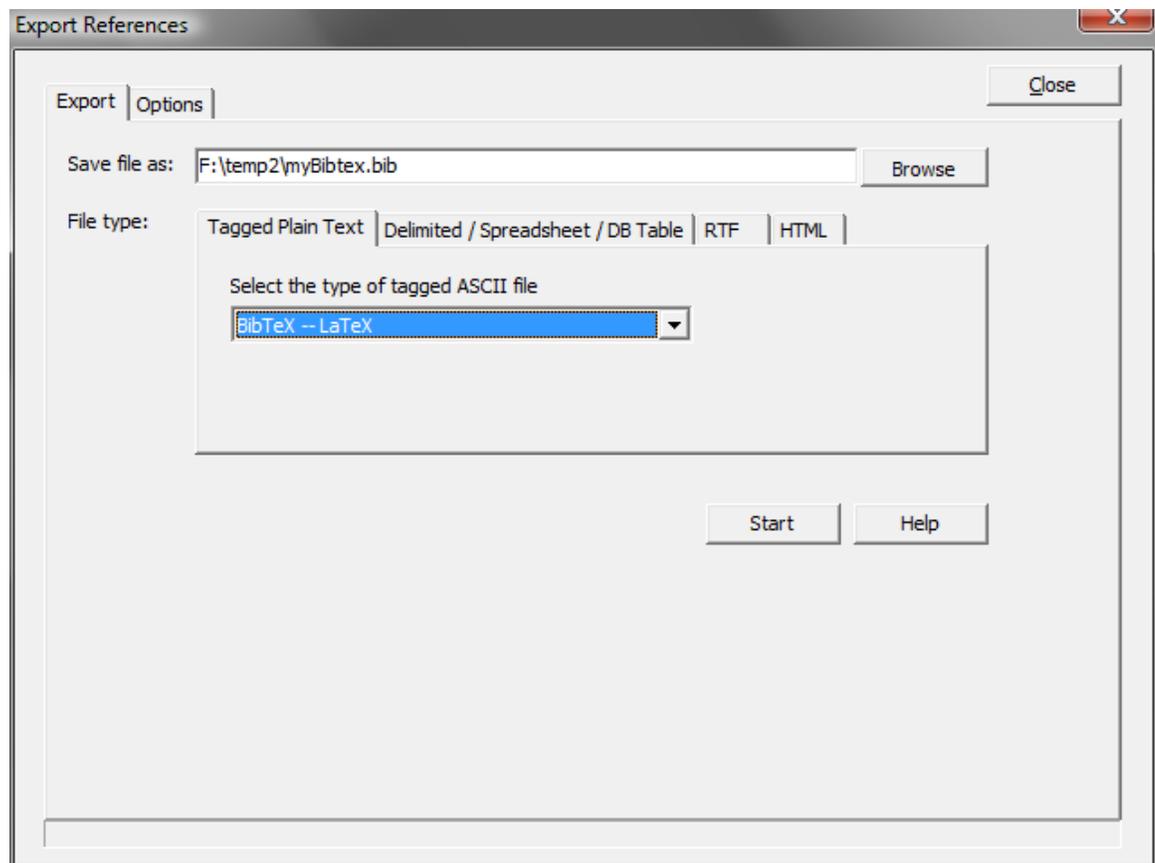
Export references as RTF or HTML file

- If you want to export references to another database or spreadsheet application, you can use the export wizard to export references in many formats including: Paradox, DBase, Excel, Lotus 1-2-3, Quattro Pro, SQL script, XML, Access, ADO connection, tab or comma delimited file, html, PDF, etc.

Export references to a delimited file, a spreadsheet, or a database table

#### 4.6.3.1 Export as BibTeX for LaTeX

BibTeX is a bibliographic record format used by LaTeX programs. If you need to export Biblioscape references to LaTeX, you can do the following:



1. Select the records you want to export.
2. Go to the menu command "File | Export...".
3. Next to the label "File type:", make sure the tab "Tagged Plain Text" is the active one.
4. Select "BibTeX -- LaTeX" as the export file type.
5. Click the "Browse" button to select the folder you want to export to and give it a file name.

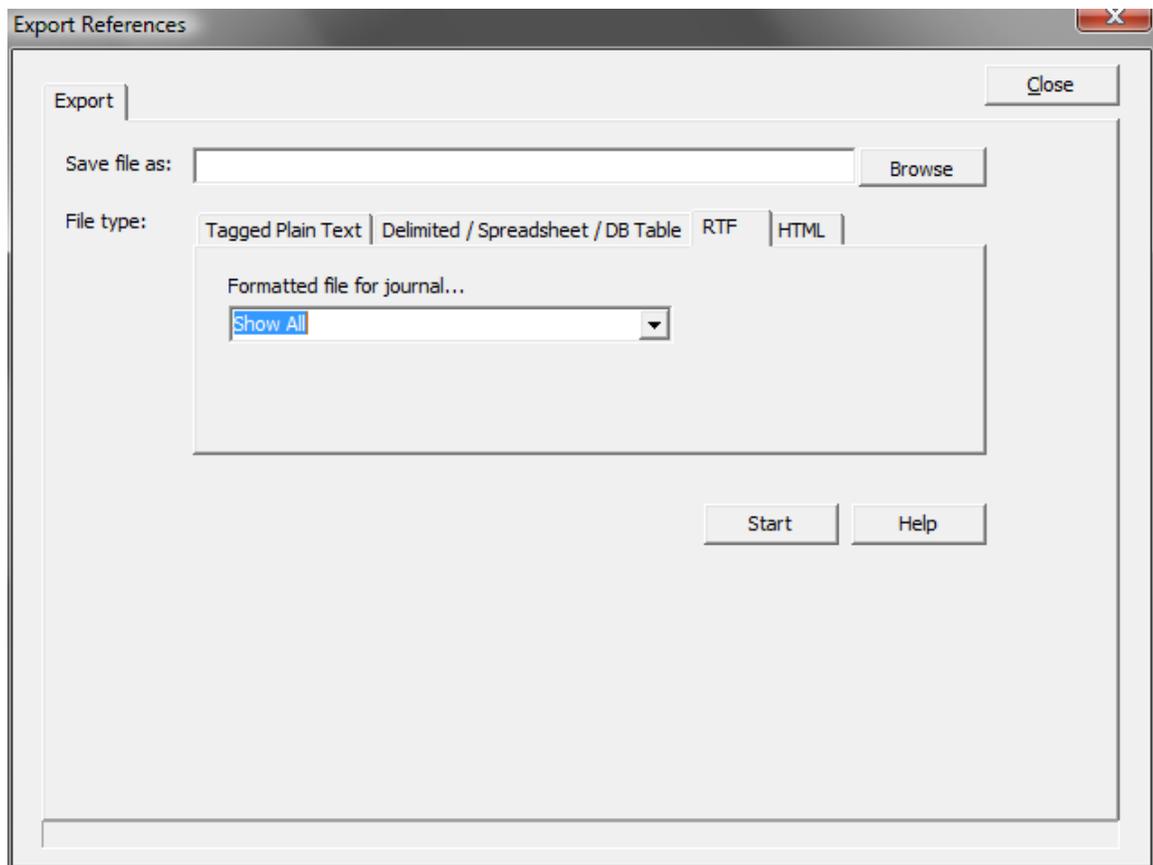
6. Click the "Start" button to export.

See also: Using Biblioscape with LaTeX editors.

#### 4.6.3.2 Export references as RTF or HTML file

Biblioscape comes with 2,000 plus output styles. These styles are designed to generate citations and a bibliography for your writings. You can also use these styles to print or export references in a certain format. When you export references using an output style, you have to choose either RTF format or HTML format. Both formats can be opened by any word processor. Since Biblioscape allows users to create a new style, this makes it possible for you to create a style for special needs. For example, if you need to export references in a format that is not supported by existing options, you can just create a new style for it. If you need the file in plain text format, you can first open the RTF file in a word processor and then save it as a plain text file. Here are the steps to export references in RTF or HTML formats.

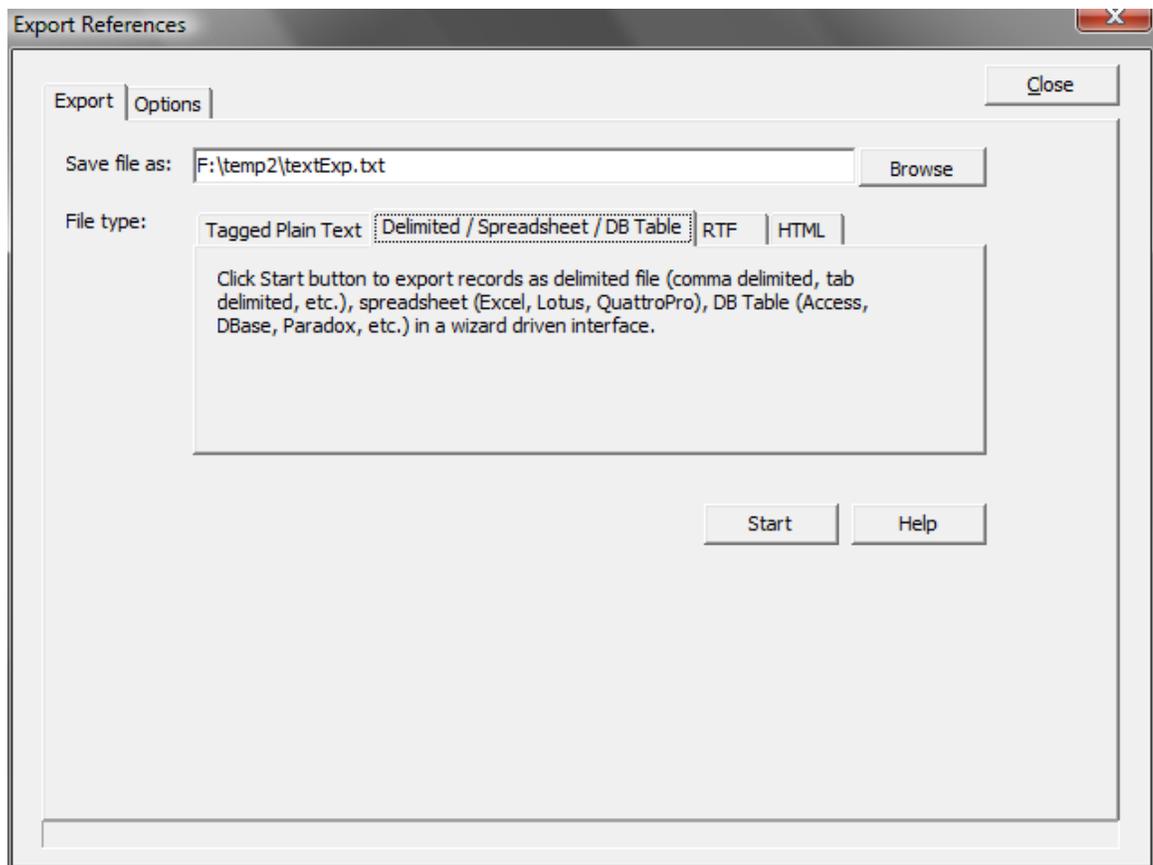
1. Select the references you want to export.
2. Go to the menu command "File | Export".
3. Click the "RTF" or "HTML" tab as "File type:", and select the output style to use. If you chose to export in HTML format, there is an option to create a citation list at the top and link each citation to the corresponding item in the bibliography.
4. Click the "Browse..." button, select the export folder and give a file name.
5. Click the "Start" button to export.



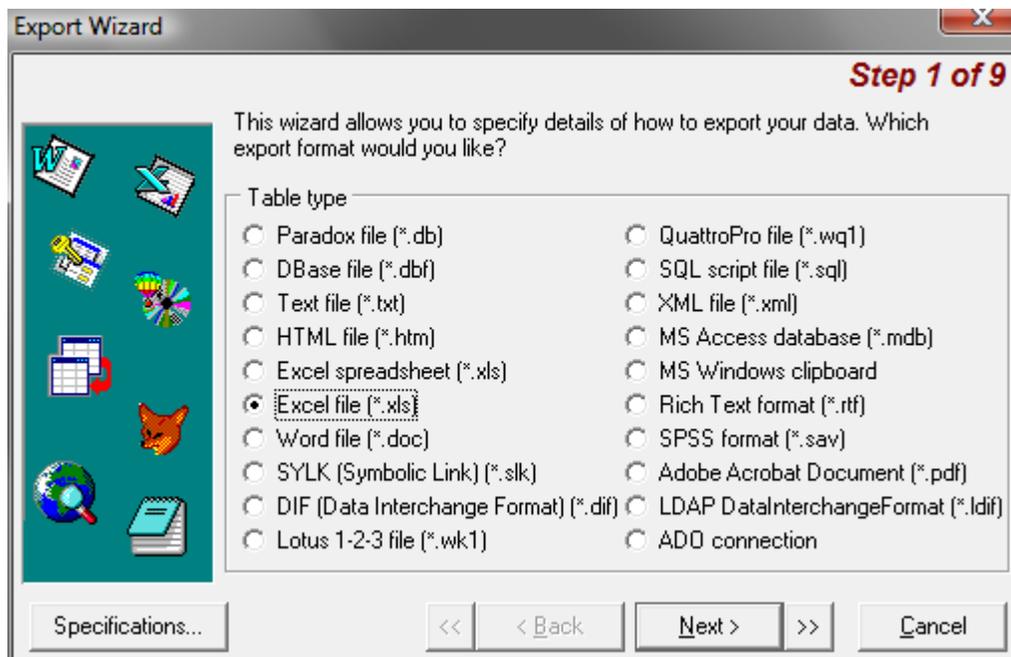
#### 4.6.3.3 Export references to a delimited file, a spreadsheet, or a database table

If you need to export references to a database program like Access, a spreadsheet program like Excel, or as a comma/tab delimited file, you have to use the export wizard.

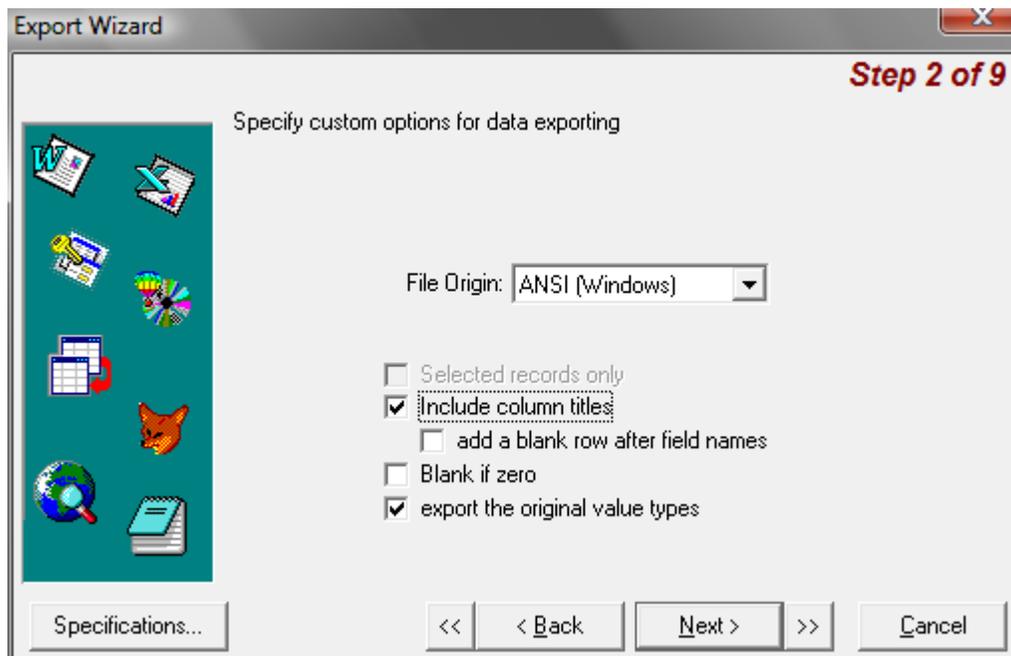
1. Open the folder you want to export. If you want to export all references in your database, go to "References | Retrieve All" first. You can also open a collection, smart collection, or run a search. All the references in your current list will be exported.
2. Click "File | Export" to bring out the "Export References" window.



3. Click the "Browse" button to select the export folder and give a file name.
4. Select the "Delimited / Spreadsheet / DB Table" tab and click the "Start" button.
5. The first step is to select a export file type. The selections are self explanatory, but there are a few things worth mentioning. If you choose to export as a Paradox file, you need to have Borland Database Engine (BDE) installed on your computer. BDE is not installed as part of Biblioscape. If you choose to export in XML file, it may not work in all cases, because if there are special symbols like "/" in your text, XML parser will treat it as a not well-formed XML file. If you choose to export in "Excel spreadsheet", long text like an Abstract will be cut short. Long text will not be cut if you select "Excel file".

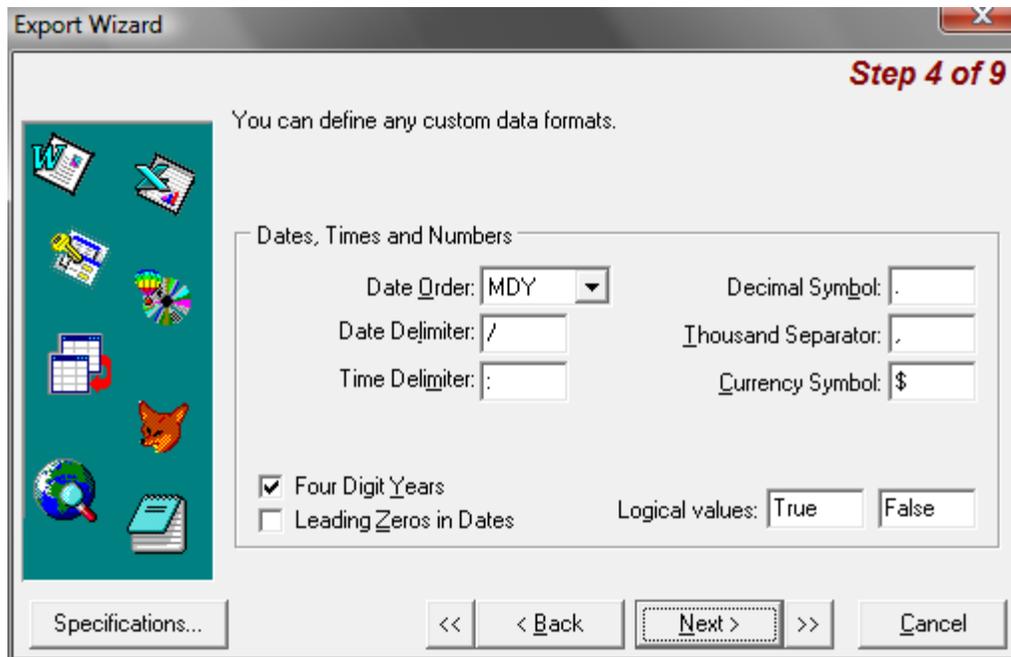


6. From the second step on, the wizard screens will be different depending on which table type is selected in step 1. Let's use "Excel file (\*.xls)" as an example. Many selections in this example apply to other table types as well. In step 2, the box "Include column titles" is checked, so the first row in the Excel spreadsheet will display the database field name. Ex: "Authors", "Title", etc. The option "Export the original value types" will set the spreadsheet column as Date type if this field is a Date type in the database.

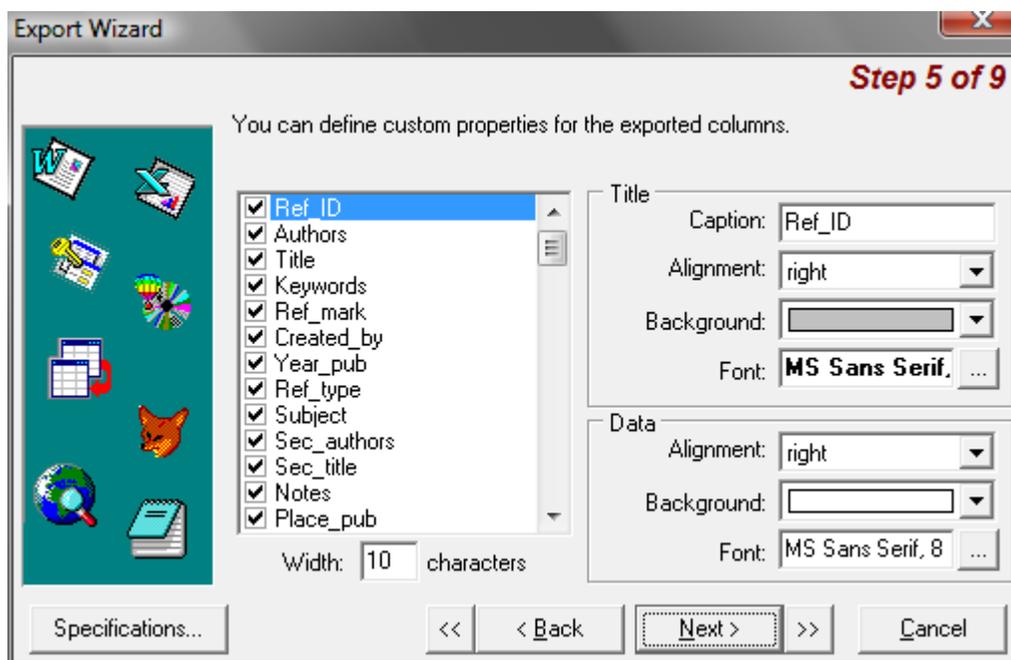


7. When exporting as a spreadsheet, there is no step 3. In step 4, you need to select how

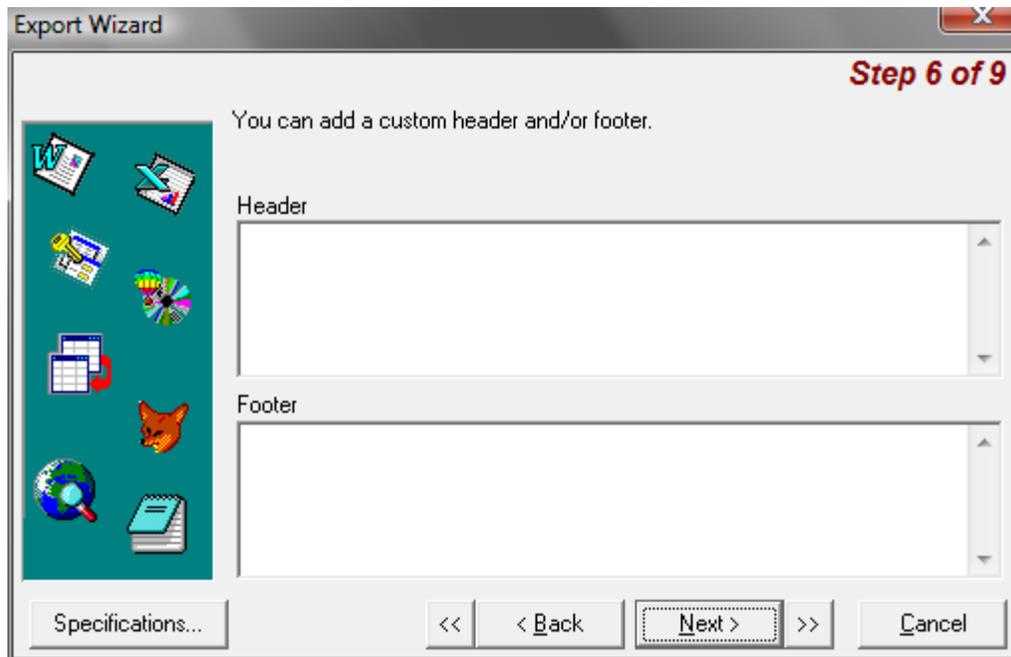
dates, times and numbers will be formatted. The settings are self-explanatory, and you can leave it unchanged in most cases.



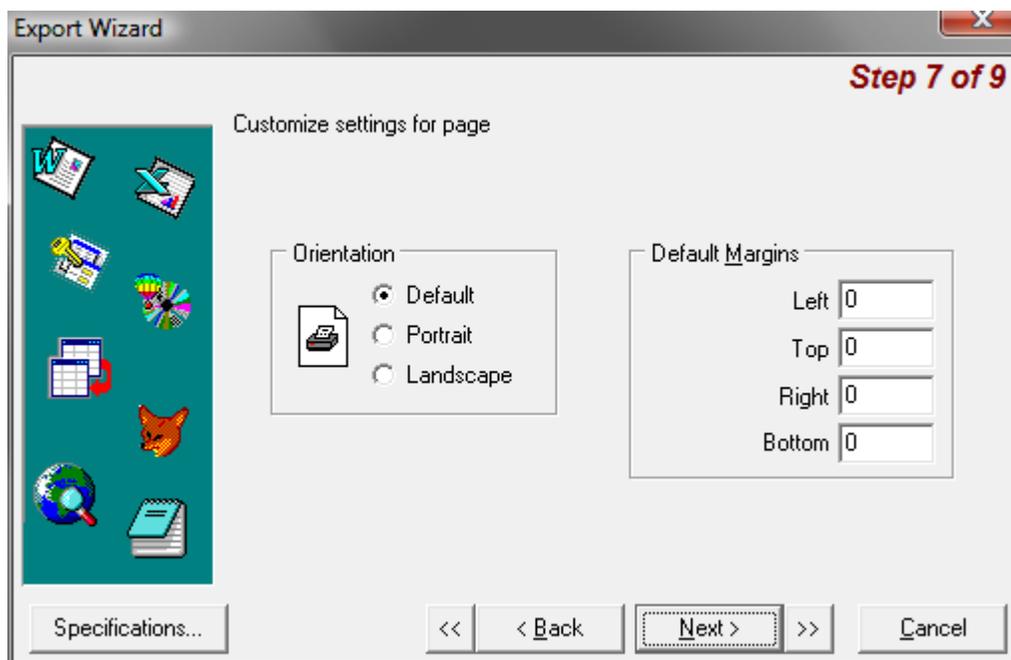
8. In step 5, you must decide which data fields should be exported. By default, all fields are selected, so in most cases, users will not need to change this. For each field, you can change its caption, alignment, color, etc. Most users should leave all settings as default and go to the next step.



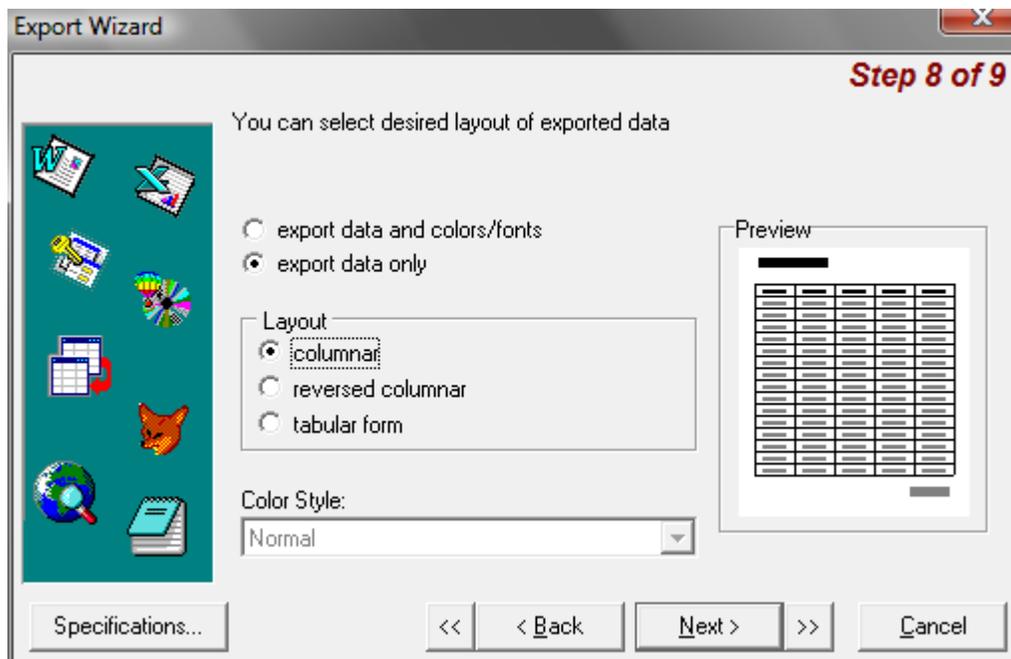
9. Step 6 allows you to customize the Header and Footer in the export file. In most cases, there is no need to add a header or footer.



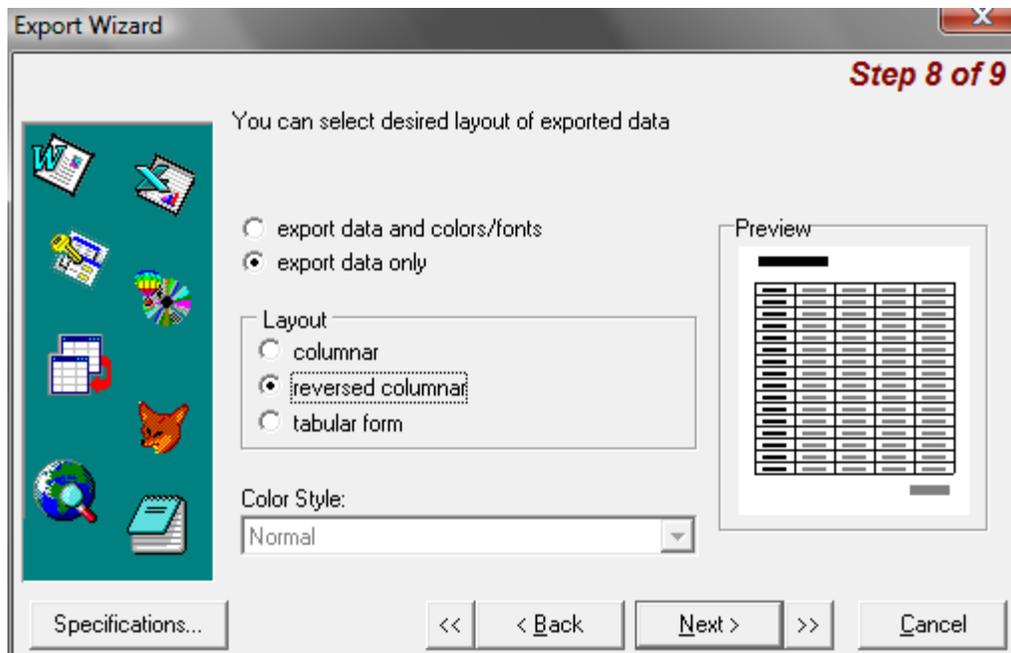
10. In step 7, you can select the page orientation and margins. They should be left as default in most cases.



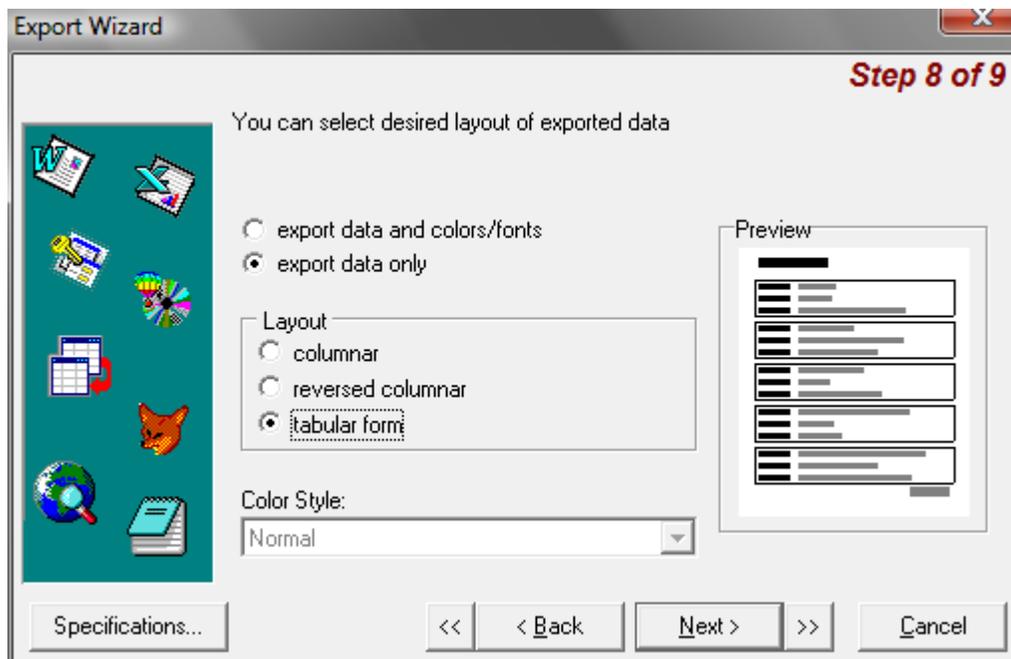
11. In step 8, you must make a big decision about the spreadsheet layout. You have to choose between "columnar", "reversed columnar", and "tabular form".



The "columnar" selection is the most popular one. It lists database fields as spreadsheet columns and database records as spreadsheet rows.

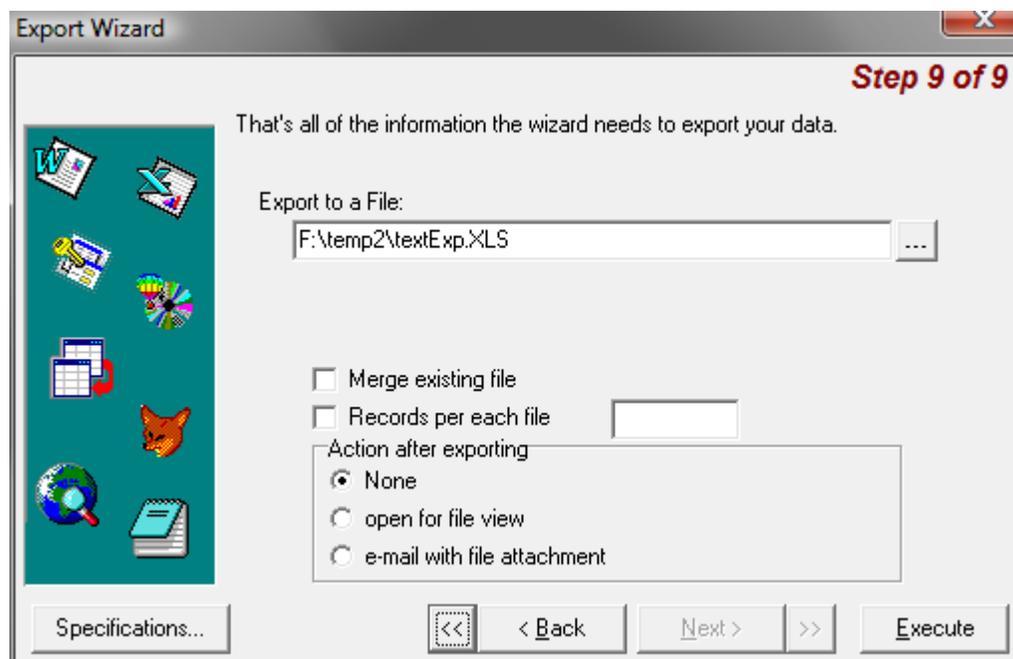


The "reversed columnar" selection is less used. It lists database fields as spreadsheet rows and database records as spreadsheet columns.



The "tabular form" should be selected if you want to have only two columns that display each record one after another. For each record, the database field name is shown in column one and its value is shown in column two. After all database fields and their values are listed for record one, it will repeat the same list for record two.

12. The last step allows you to select what actions to take after the export. If "open for file view" is selected, Excel will open the exported file automatically. If "email with file attachment" is selected, you will be prompted to enter an email address. You can also choose to merge the file with another one, or set the number of database records to be exported. Click the "Execute" button to start the export process.



If you want to save all your settings, you can click the "Specifications..." button and give it a name. Then you can just click this button again next time you need to export, and load the saved settings instead of going through the selections again.

#### 4.6.3.4 Export references to other software programs

##### [Export to EndNote](#)

If your colleagues use EndNote, you can exchange bibliographic data with your colleagues by importing and exporting references in EndNote Refer format. The following steps show you how to export references to EndNote.

1. In Biblioscape, open the folder you want to export. If you want to export all your references, please go to "References | Retrieve All". You can also run a search and export the hits only.
2. Go to the menu command "File | Export...".
3. In the Export window, go to the tab "Tagged Plain Text" and select "Refer -- EndNote" as the export type.
4. Click the Browse button to pick the export folder and give the file a name.
5. Click the Start button to export. If only one reference is selected, all the references in the

current list will be exported. If there is more than one reference selected, only the selected references will be exported.

6. In EndNote, go to "File | Import...".
7. Select "EndNote Import" as the "Import Options". Click the "Choose File..." button to select the file exported in step 5.
8. Click the "Import" button to start importing.

#### Export to Reference Manager

If your colleagues use Reference Manager, you can exchange bibliographic data with your colleagues by importing and exporting references in RIS format. The following steps show you how to export references to Reference Manager.

1. In Biblioscape, open the folder you want to export. If you want to export all your references, please go to "References | Retrieve All". You can also run a search and export the hits only.
2. Go to the menu command "File | Export...".
3. In the Export window, go to the tab "Tagged Plain Text" and select "RIS -- Reference Manager" as the export type.
4. Click the Browse button to pick the export folder and give the file a name.
5. Click the Start button to export. If only one reference is selected, all the references in the current list will be exported. If there is more than one reference selected, only the selected references will be exported.
6. In Reference Manager, go to "File | Import Text File...".
7. Select "RIS" as the "Filter". Click the "..." button to select the file exported in step 5.
8. Click the "Import" button to start importing.

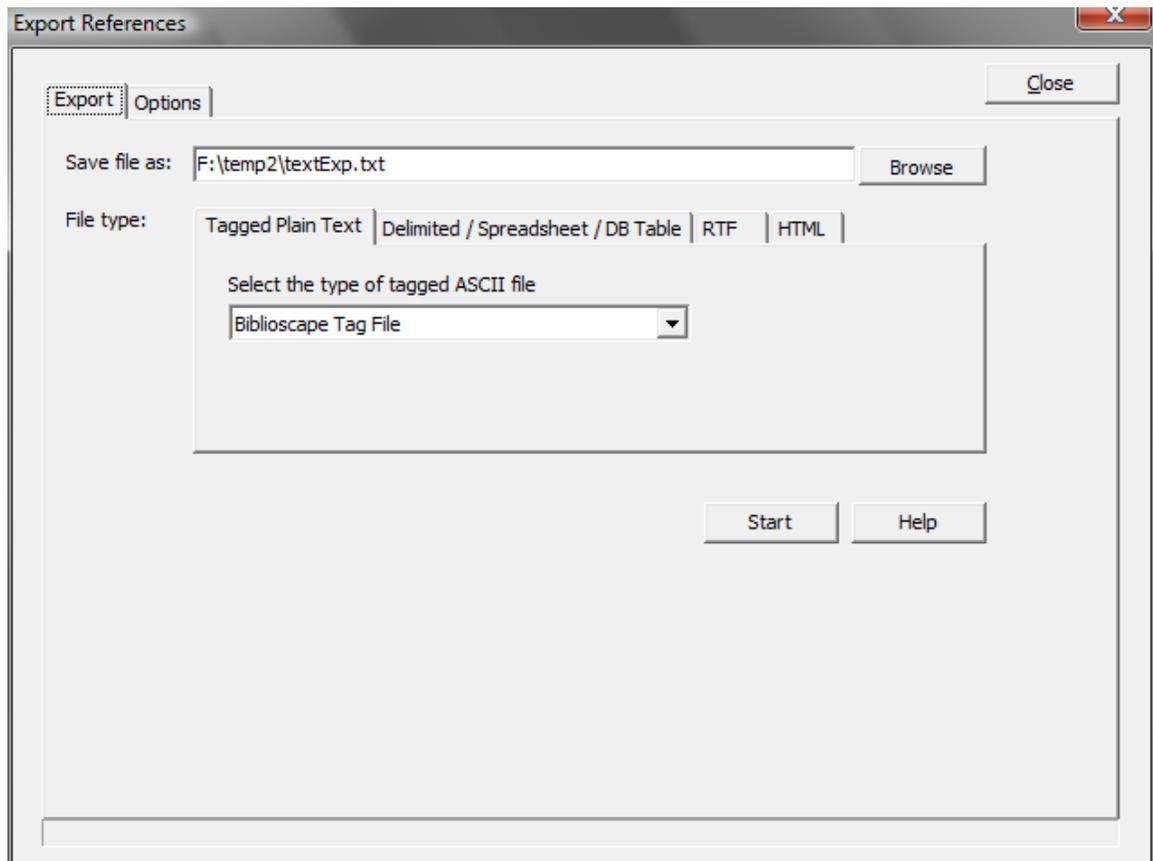
#### 4.6.4 Transfer references between two Biblioscape databases

When you need to transfer references from one Biblioscape database to another, references should be first exported as a Biblioscape tag file, and imported to the other database. This way, no data will be lost during the export and import process.

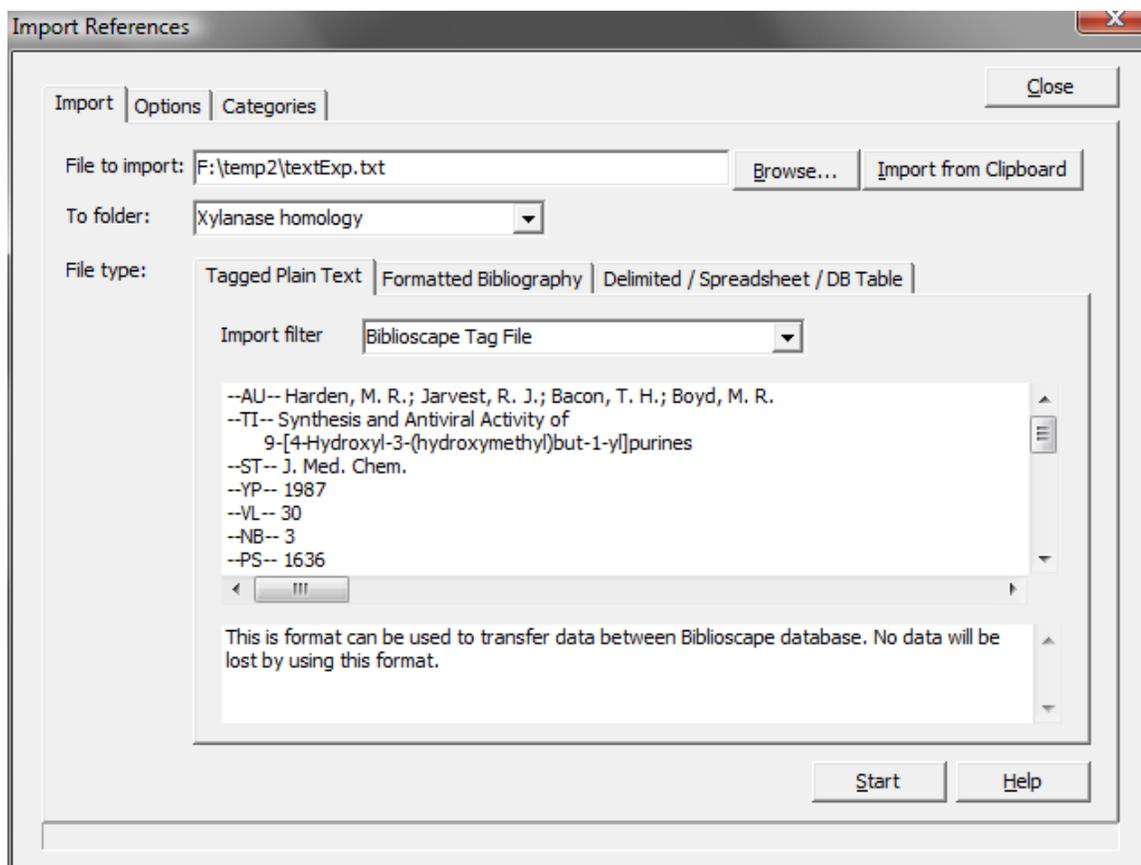
1. Open the first database. Select the references you want to export. If there is only one

record selected, Biblioscape will assume you want to export all the references in the current list. If you want to export all the references in your database, go to "References | Retrieve All".

2. Go to "File | Export". Click the "Browse" button and select the folder where you want to store the export file and type a file name.



3. Make sure the file type selected is "Tagged Plain Text", and the "Biblioscape Tag File" is selected as the export format. Click the Start button to export.
4. Open the second database. Go to "File | Import". Click the "Browse..." button to select the file you just exported.



5. Select the folder where references will be imported. Make sure the file type selected is "Tagged Plain Text". Select the "Biblioscape Tag File" as the "Import filter". Click "Start" to import.

After transferring references this way, data of the following 3 fields are changed.

- Reference ID: The field Ref\_ID is database dependent. The user has no control over the value assigned. A Ref\_ID number is only assigned once in a database to guarantee each value is unique, so the number will change when you import a reference from one database to another. If you want an ID number that won't change during export and import, you have to enter it manually in the "Label" field or another field. Biblioscape also keeps a unique value in the "File As" field which include first author, year published and part of the title.
- Date Created: The value Date\_created is stamped by Biblioscape when a new record is created, so when you import a reference, this value is generated according to the current date, not the Date\_created value in the Biblioscape tag file. Since the original Date Created value may be important for some users, Biblioscape will put it in the Custom 1 field if there is one.
- Date Modified: The value is Date\_modified is stamped by Biblioscape when a new record is

changed, so when you import a reference, this value is generated according to the current date, not the Date\_modified value in the Biblioscape tag file.

#### 4.6.4.1 Biblioscape tag file

Biblioscape uses a plain text ASCII file to transfer reference data between different Biblioscape databases. You can view the file with any word processor or text editor. When you need to transfer bibliographic records from other programs into Biblioscape, you can also prepare your data in this format. Once your Biblioscape Tag File is ready, it can be easily imported into the Biblioscape database by going to "File | Import". After clicking the Browse button, select the file to be imported, choose the import filter "Biblioscape Tag File", and click the Start button to import.

##### Field code used in Biblioscape tag file

The Biblioscape tag file uses two-letter codes to represent different data fields. These codes are preceded by two dashes "--", and followed by two dashes plus a space "-- ". The following table lists the data fields and their corresponding two-letter code. An example of a Biblioscape tag file is shown at the end. In a Biblioscape tag file, each record is separated by a line with six dashes "-----".

Authors	--AU--
Title	--TI--
Sec_title	--ST--
Year_pub	--YP--
Volume	--VL--
Number	--NB--
Page_start	--PS--
Page_end	--PE--
Keywords	--KW--
Ref_mark	--RM--
Ref_user	--RU--
Ref_type	--RT--
Subject	--SB--
Sec_authors	--SA--
Notes	--NT--
Place_pub	--PP--
Publisher	--PB--

---

Tert_authors	--TA--
Tert_title	--TT--
Edition	--ED--
Date_pub	--DP--
Type_work	--TW--
Quat_authors	--QA--
Quat_title	--QT--
Isbn_issn	--IS--
Label	--LA--
Abstract	--AB--
Date_input	--DI--
Date_modified	--DM--
Availability	--AV--
Priority	--PR--
Location	--LO--
Address	--AD--
Language	--LG--
Country	--CO--
Url	--UR--
Custom_1	--C1--
Custom_2	--C2--
Custom_3	--C3--
Custom_4	--C4--
Custom_5	--C5--
Custom_6	--C6--
Custom_7	--C7--
Custom_8	--C8--
Custom_date	--CD--
Custom_number	--CU--
Ref_doc	--RD--
Modified_by	--MB--
Attachment	--AT--
File_as	--FA--

Call_number	--CN--
Description	--DE--
Reprint	--RP--
Date_freeform	--DF--
Ref_misc	--RS--
Categories	--CA--
Web_post_hide	--WP--
Title_short	--TH--
Work_reviewed	--WR--
Extend_work	--EW--
Section	--SE--
Accession_num	--AC--
Last_post	--LP--
DOI	--DO--
Original_pub	--OP--
DB_name	--DN--
DB_provider	--DV--

A sample Biblioscape tag file (\*.btf) file:

---

```
--AU-- Baklouti, F.; Huang, S. C.; Tang, T. K.; Delaunay, J.; Marchesi, V. T.; Benz, E. J.
--TI-- Asynchronous Regulation OF Splicing Events Within Protein 4.1 Pre-mrna During Erythroid
Differentiation
--ST-- Blood
--YP-- 1996
--VL-- 87
--NB-- 9
--PS-- 3934
--PE-- 3941
--KW-- Membrane skeletal protein-4.1; Insertion deletion mutations; Actin binding domain;
Molecular analysis; Hereditary elliptocytosis; Expression; Spectrin; Cells; Rna; Isoforms
--RT-- Journal Article
--TW-- Article
--QT-- Clinical medicine.
--IS-- 0006-4971
```

--AB-- Protein 4.1 is an 80-kD structural component of the red blood cell (RBC) cytoskeleton. It is critical for the formation of the spectrin/actin/protein 4.1 junctional complex, the integrity of which is important for the horizontal strength and elasticity of RBCs. We and others have previously shown that multiple protein 4.1 mRNA isoforms are generated from a single genomic locus by several alternative mRNA splicing events, leading to the insertion or skipping of discrete internal sequence motifs. The physiologic significance of these splicing events has been established for only two of these motifs: (1) an upstream 17-nucleotide sequence located at the 5' end of exon 2 that contains an in-frame ATG initiation codon, the inclusion of which by use of an alternative splice acceptor site in exon 2 allows the production of a 135-kD high-molecular-weight isoform present in nonerythroid cells; (2) exon 16, which encodes a 21-amino acid (21aa) segment located in the 10-kD "spectrin/actin binding domain" (SAB), the presence of which is required for junctional complex stability in RBCs. Previous studies by our group and others suggested that, among blood cells, this exon was retained only in mature mRNA in the erythroid lineage. Exon 16 is one of a series of three closely linked alternatively spliced exons, generating eight possible mRNA products with unique configurations of the SAB. In this communication, we report studies of the expression of both the translation initiation region and the SAB region during induced erythroid maturation in mouse erythroleukemia (MEL) cells. We have found that only two of eight possible combinatorial patterns of exon splicing at the SAB region are encountered: the isoform lacking all three exons, present in predifferentiated cells, and the isoform containing only exon 16, which increases in amount during erythroid differentiation. The protein isoform containing the 21aa segment encoded by exon 16 efficiently and exclusively incorporates into the membrane, whereas the isoform lacking this 21aa segment remains in the cytoplasm, as well as the membrane.

--AD-- Reprint available from: Baklouti F INST PASTEUR LYON CNRS URA 1171 AVE TONY GARNIER F-69365 LYON 07 FRANCE YALE UNIV DEPT INTERNAL MED NEW HAVEN,CT USA YALE UNIV DEPT PATHOL NEW HAVEN, CT USA YALE

--LG-- English

-----

--AU-- Sa, M. CM.; Kascheres, A.

--TI-- Electronically Mediated Selectivity IN Ring Opening OF 1-azirines - THE 3-x Mode - Convenient Route To 3-oxazolines

--ST-- Journal of Organic Chemistry

--YP-- 1996

--VL-- 61

--NB-- 11

--PS-- 3749

--PE-- 3752

--RT-- Journal Article

--TW-- Article

--QT-- Chemistry.

--IS-- 0022-3263

--AB-- The mild base-promoted reaction of methyl 2-phenyl-1-azirine-3-acetate (1) with aldehydes and acetone provides a new and simple route to the 3-oxazolines 5, which are formed in good yields by the electrophilic trapping of an imino anion produced by C-N bond cleavage in the 1-azirine enolate intermediate 6. Chloranil oxidation of 5 containing an aromatic substituent at C-2 affords oxazoles 7, while reaction of 5 containing an aliphatic group at C-2 produces 5-methylene-3-oxazolines 8 and 5-spiro-2-oxazolines 9 in addition to 7. [References: 11]

--AD-- Reprint available from: Kascheres A UNIV ESTADUAL CAMPINAS INST QUIM CP 6154 BR-13083970 SAO PAULO BRAZIL UNIV ESTADUAL CAMPINAS INST QUIM BR-13083970 SAO PAULO BRAZIL

--LG-- English

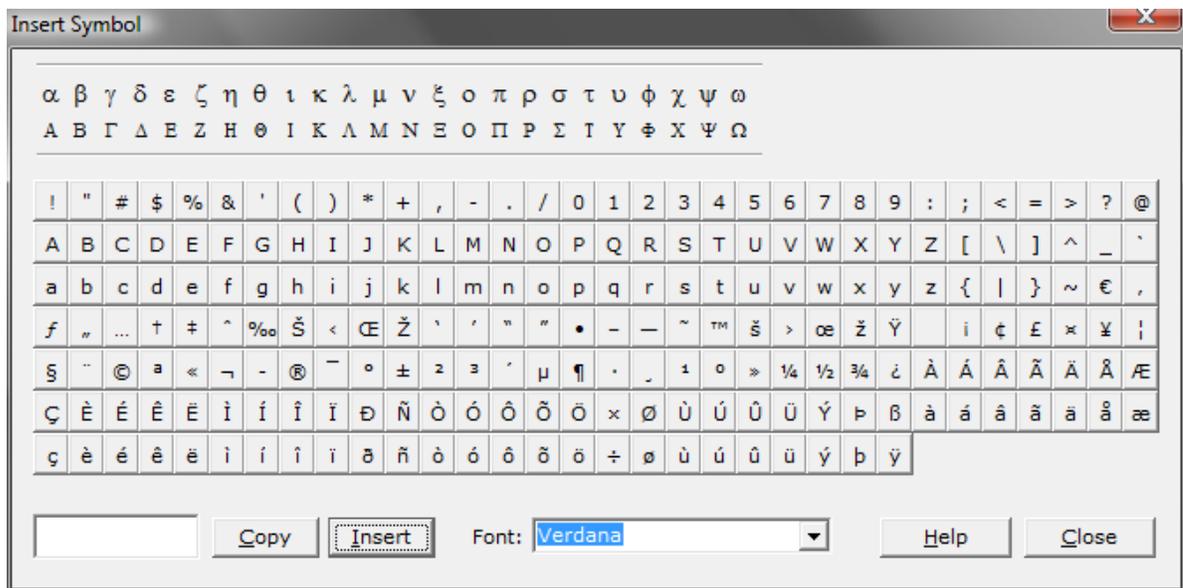
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## 4.7 Tools and utilities

There are several utilities you can use to manipulate records in the reference table. These include moving text from one data field to another. This could be very useful when you decide to reorganize contents in your reference table, especially for the 8 custom fields. Biblioscape also provides flexible ways to find duplicate records and remove them. You can define which fields to use for identifying a duplicate. If you have many frequently used phrases, you can enter them in the term list and use them later without typing.

### 4.7.1 Insert symbols

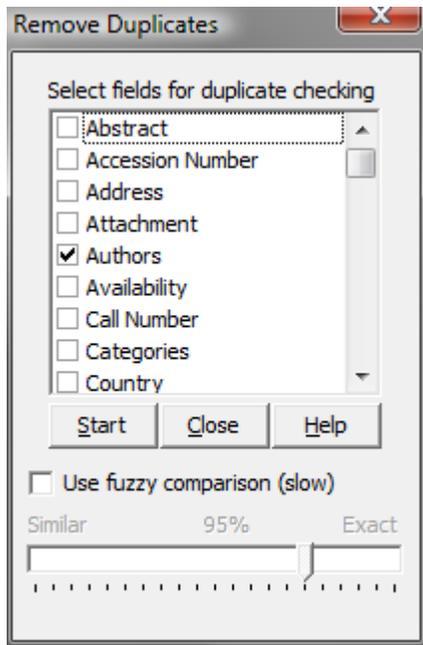
To insert symbols, put the cursor where a symbol needs to be inserted and click the menu command "Edit | Insert Symbol". Select the symbol you want to insert and click the "Insert" button. If you know the ASCII code number, you can hold down the Alt key and enter the ASCII code number using the number pad key on the right of your keyboard.



Biblioscope does not support formatted text in data fields of a reference except the "Document" field. If a Greek letter is selected for insertion, the English letters will be used instead. In the Biblioscope scripts for Word and WordPerfect, a menu has been added to convert English words for Greek letters into the correct symbols. You can also include RTF code directly into the Biblioscope data fields. Once the reference is formatted by Biblioscope, those RTF codes will be used. This is very flexible if you know RTF well.

#### 4.7.2 Eliminate duplicates

It is possible the same record was entered twice in your database. You can remove duplicate records using the "Eliminate Duplicates" tool. "Eliminate Duplicates" only removes duplicate records in the current references list. If you want to remove all duplicates in your database, you should first click on the menu command "References | Retrieve All". Click on the menu command "Tools | Utility | Eliminate Duplicates". You can define what a duplicate is by checking the data fields to use.



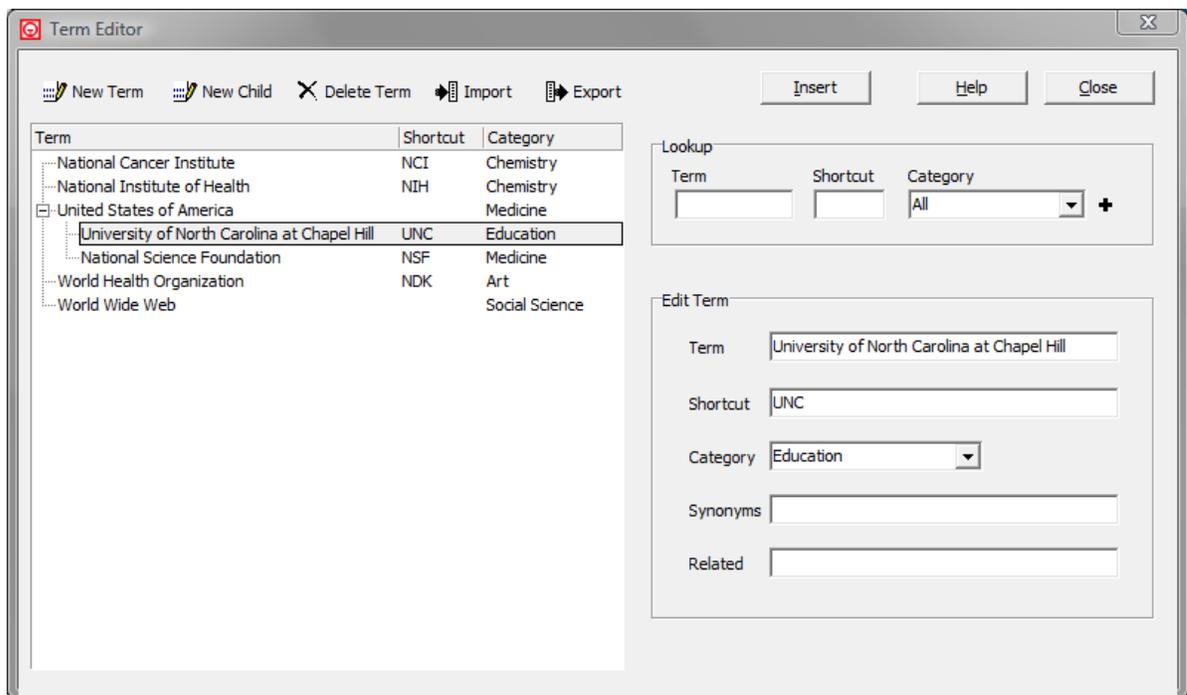
#### Eliminate duplicates using fuzzy comparison

When you have a large collection of bibliographic records, the same record may be entered twice, or it may be imported more than once due to different formatting by information providers. In such cases, you need to use fuzzy comparison. You can change the degree of fuzziness by dragging the track bar. With fuzzy search, Biblioscape will mark all duplicate records and retrieve them after the search. You can then examine the duplicates and do data merge before deleting one of the duplicates.

Note: Using fuzzy comparison to eliminate duplicates is very slow. You can do this when you have finished using Biblioscape. So, while Biblioscape is removing duplicates using fuzzy search, you can work on something else with your computer.

### 4.7.3 Term editor

Biblioscape allows users to keep a table of frequently used words and phrases. These words and phrases are called user-defined term lists, and you can use these lists during record input and searching.



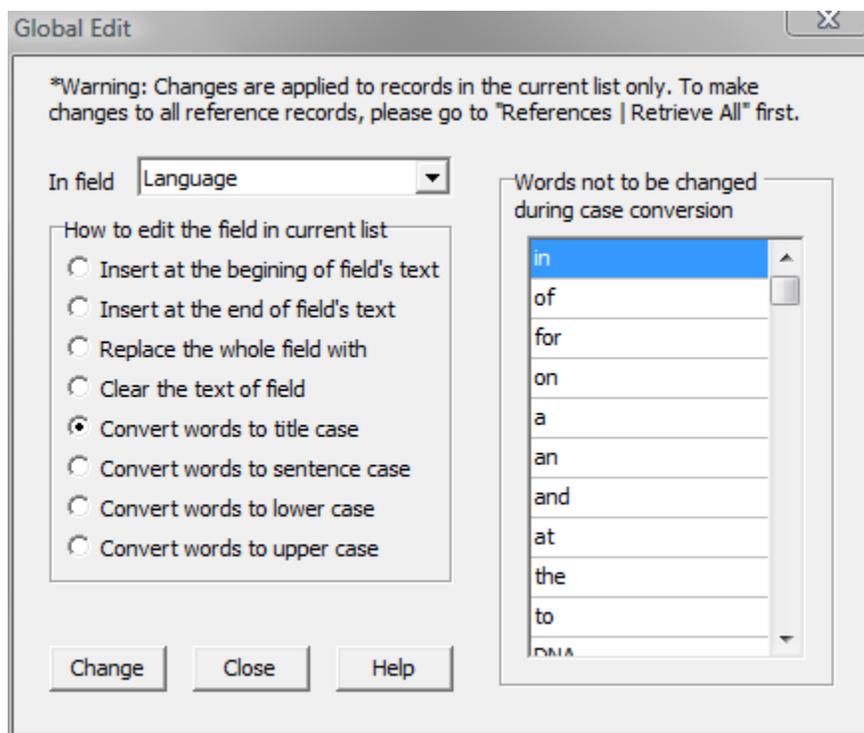
To manage the term table, click menu command "Edit | Insert Term...". Each term can be assigned a Shortcut and Category. You can quickly find a term by entering its shortcut into the Shortcut box. You can also quickly filter the term table by selecting a category from the combo box. Click on the "Add" button to insert a new term. Click on the "Delete" button to delete the selected terms.

The term table can be exported as a tab delimited file. If you need to import a term list into the term table, prepare the file with a spreadsheet program like Excel. There should be 3 columns. The first column contains terms, the second column contains shortcuts if there is one, and the third column contains a category name. Then save the sheet as a tab delimited file. To import this file, click the "Import" button and select the tab delimited file. Biblioscape also allows users to import a simple word list in a plain text file. Each line can contain a word or phrase.

To add a new category, click on the "+" button next to the category box. To reset the category of selected terms, please click on the right mouse button and choose "Reset Category".

#### 4.7.4 Global edit

Sometimes you may want to make changes to more than one record at once. In that case, "Global Edit" is the tool to use. Global edit will operate on your current reference list. If you want the changes to be applied to all the references in your database, click the menu command "References | Retrieve All" first. To use global edit, click on the menu command "Tools | Utility | Global Edit...". In the Global Edit window, you need to first select a data field for the global edit operation. All the changes will be limited to this field only.



**Insert at the beginning of field's text:** Insert the text in the editing box at the beginning of the selected data field for all records in the current list.

**Insert at the end of field's text:** Insert the text in the editing box at the end of the selected data field for all records in the current list.

**Replace the whole field with:** Replace the text in the selected data field with the text in the editing box for all records in the current list.

**Clear the text of field:** Clear the selected data field for all records in the current list.

**Convert words to title case:** Convert all words except the ones in the reserved word list to title case. The reserved word list can be edited.

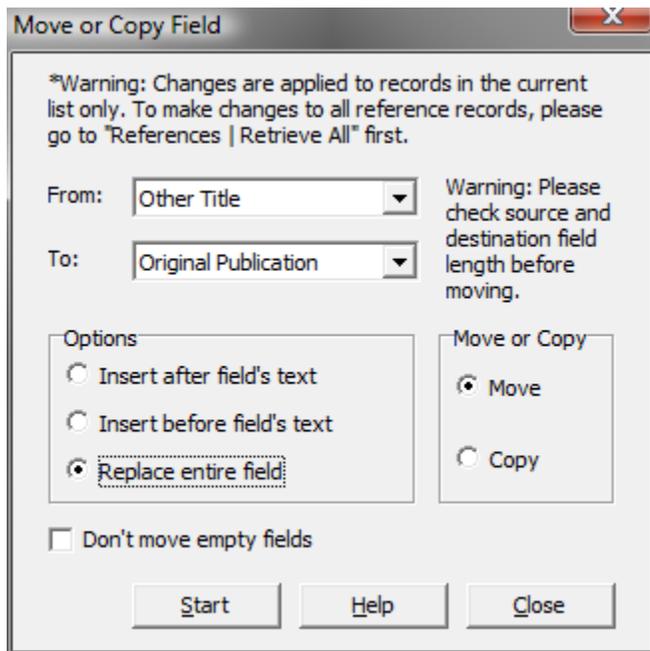
Tip: You may not want to convert some words to title case, for example: then, an, DNA... The words you want Biblioscape not to change the case of can be added to the file "c:\program files\biblioscape\global\caseWord.txt". Or, you can add words to this file directly on the right of the window under "Words not to be changed during case conversion".

**Convert words to lower case:** Convert all words except the ones in the reserved word list to lower case. The reserved word list can be edited in the "Options" window.

**Convert words to upper case:** Convert all words except the ones in the reserved word list to upper case. The reserved word list can be edited in the "Options" window.

#### 4.7.5 Move or copy field

You can move or copy the entire contents of one field to another one. This operation will be applied to all references in the current reference list. If you want to apply this operation to all the references in your database, go to the menu command "References | Retrieve All" first. To move or copy field content, click menu command "Tools | Utility | Move or Copy Field...".



1. First, decide if you want to move or copy a field. When moving a field, the contents in the original field will be deleted. When copying a field, the contents in the original field will be kept.
2. Select the data field you want to move the data from.
3. Select the data field you want the data to be moved to. Each data field has a different length. If you move a data field with longer length to a data field with shorter length, the extra text in the original field will be cut off. The field length can be found by running "... \Bibloscape x\Tools\DBSys.exe". Open the bib table and go to the "Structure" tab.
4. From the Options group, select the way data will be moved. You can "Insert after field's text", "Insert before field's text", or "Replace entire field". If you choose the last option, you should specify whether to delete the original text in the destination field if the source field is empty.

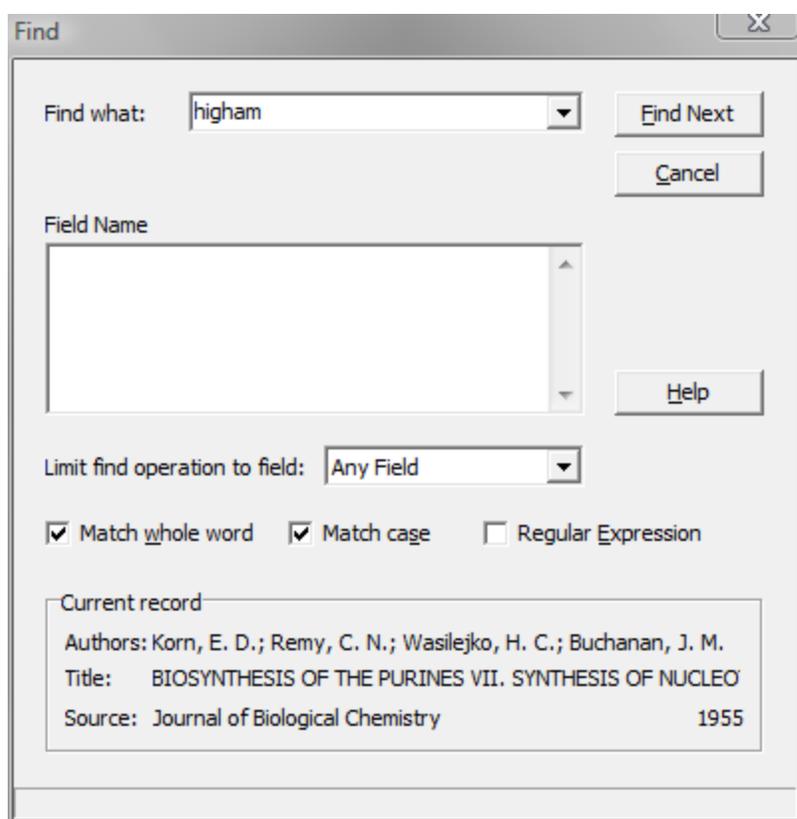
5. Click "Start" button to start the operation.

Note: This operation can't be undone. Think carefully before clicking the "Start" button. You can also make a backup copy of your database before moving fields.

#### 4.7.6 Find and replace

Bibioscape comes with several searching tools that allow you to retrieve a group of records based on your searching criteria. But, if you want to locate an individual word or phrase, "Find" is a better tool. If you want to find and replace a misspelled word, then "Replace" is the right tool to use.

##### Find a word or phrase

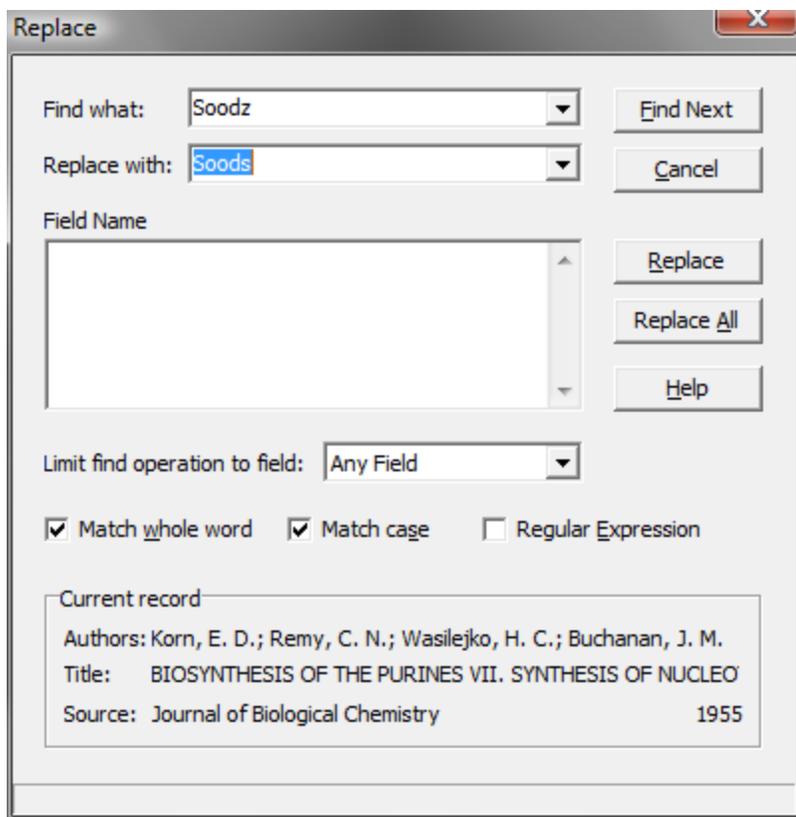


1. Click on menu command "Edit | Find...".
2. Type the word you want to find. You can limit the search to any single data field or any data field.
3. Click on the "Find Next" button.

Note: "Find" will only search words in the current list. If you want to find all words in the current database, click the menu command "References | Retrieve All" first. If you want to enter the find string using regular expression, check the box "Regular Expression". Regular expression is a

powerful and flexible text pattern matching tool.

### Replace a word or phrase



1. Click on menu command "Edit | Replace...".
2. Type the word you want to find, and the word to replace it with. Use the combo box to limit your search to a certain field.
3. Click "Replace". When an instance is found, you have the option to "Replace" or skip the current one and "Find Next". If you do not want to be prompted each time, click "Replace All".

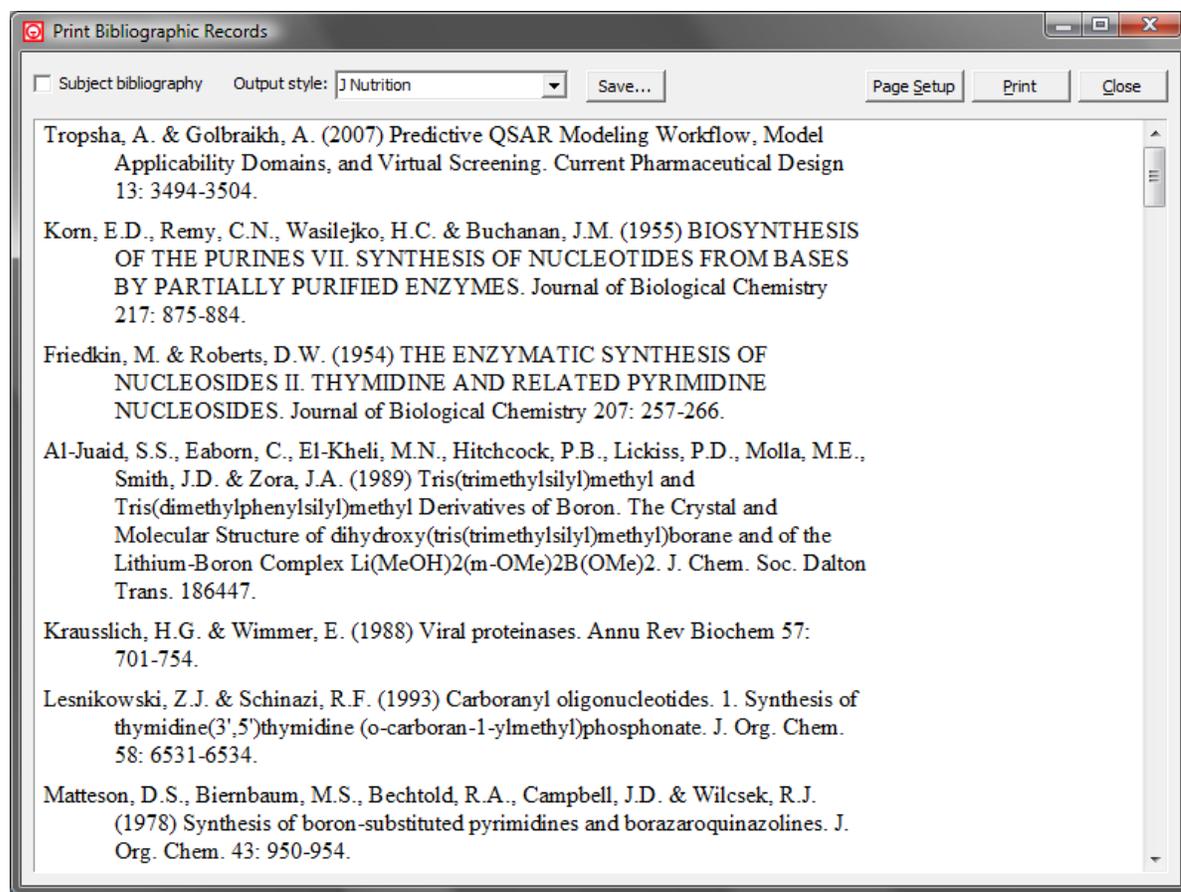
Regular expression: If you have the "Regular Expression" box checked, the search string you entered in the "Find what" box will be treated as a regular expression. Click [here](#) to learn more about regular expression. "Edit | Replace" will only search words in the current list. If you want to replace all the instances in the current database, click the menu command "Tools | Retrieve All" first. You can use the check box to make the find case sensitive, or specify whether to match the whole word or part of the word.

### 4.7.7 Printing and reporting

Biblioscape provides several ways to print references. The most popular way is to print references using an output style so that references will be printed in a format specified in the selected style. Biblioscape comes with 2,000 plus styles, and you can also create custom styles. This is also the most flexible way to print a bibliography from your reference collection. Biblioscape also provides an easy way to generate subject bibliography. You can choose any field as the subject field. If you need to print references in a card view, you can use the built-in report generator. It is also possible to visually design your own report.

#### Print formatted references

You can print selected references in any output style defined in Biblioscape. First, select the references you want to print. Then, click the menu command "File | Print Bibliography". If there is only one reference selected, Biblioscape assumes you want to print all the references in the current list. If you want to print all the references in a folder, a collection, or a smart collection, there is no need to choose select all.



The format of your references is controlled by the output style you pick. By default, Biblioscape uses the output style selected in your toolbar. If you want to use another style, pick using the

combo box. The formatted references list will be regenerated to reflect the change. You can choose to save the formatted references as a RTF file. You can open this file later in a word processor. To change the paper size, margins, and orientation, click the "Page Setup" button.

**Tip:**

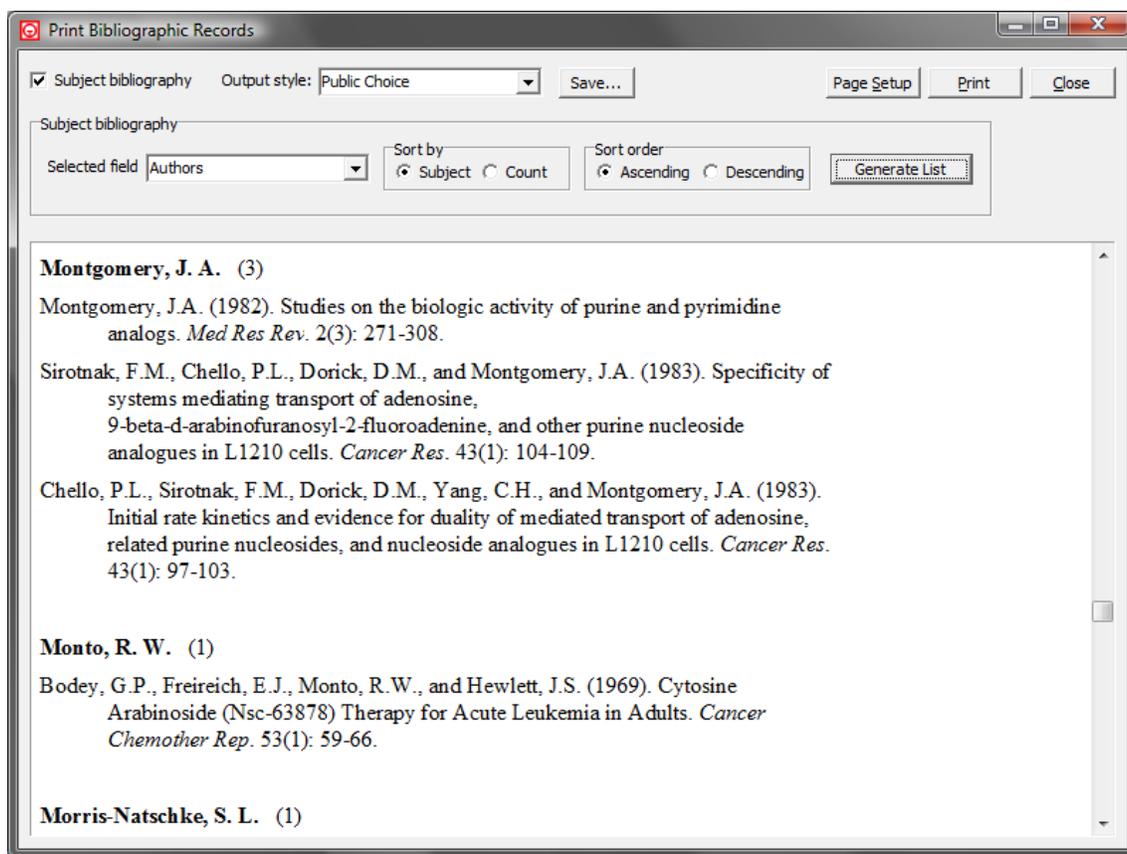
The sort order in the printed bibliography is controlled by the reference list sort order. If you need to change it, close the "Print Bibliography" window. Click the column heading to sort your references accordingly and go to "File | Print Bibliography..." again. Biblioscape also supports sorting references by more than one field. For example, you can sort references first by Authors and then by Year. Go to menu command "View | Sort...". Select a field to sort (at up to 3 levels), and click the OK button. Then go to "File | Print Bibliography...".

### [Print a subject bibliography](#)

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Subject bibliography is a list of formatted references under subject headings. The subject could be any field in Biblioscape. The most popular ones are author, keyword, journal, year, category, etc. Subject bibliography can be used to generate journal abstracts, subject index, awareness list, etc.

1. In the Biblioscape reference list, select the references you want to include for the subject bibliography. If no reference is selected, all references in the current list will be included. You can open a folder, a collection, a smart collection, or run a search to generate your reference list.
2. Go to menu command "File | Print Bibliography...".
3. Check the box "Subject bibliography" on the top left corner.



4. Under the subject bibliography section, select the field to be used as the subject heading. Select the sort field for the subject list. Next, select the sorting order for the subject headings. The headings can be sorted in ascending or descending order. The sorting order for the references under each subject heading is determined by the sorting order in your reference list. If you pick sort by "Count", the subject headings will be sorted by the number of references under each subject heading. You can choose which output style to use to format the references using the "Output style" combo box at the top. Click the "Generate List" button to produce the subject bibliography.
5. To print the subject bibliography, click the "Print" button. To save the subject bibliography as a RTF file, click the "Save..." button.

#### Print references reports

Another way to print references is to use the built-in database report writer. There are more than 10 pre-built reports for you to choose from. You can also build new reports from scratch with a wizard, or modify existing reports.

1. Go to the menu command "File | Report" and select a desired report from the combo box.

2. Click the menu command "File | Report | Print Report".

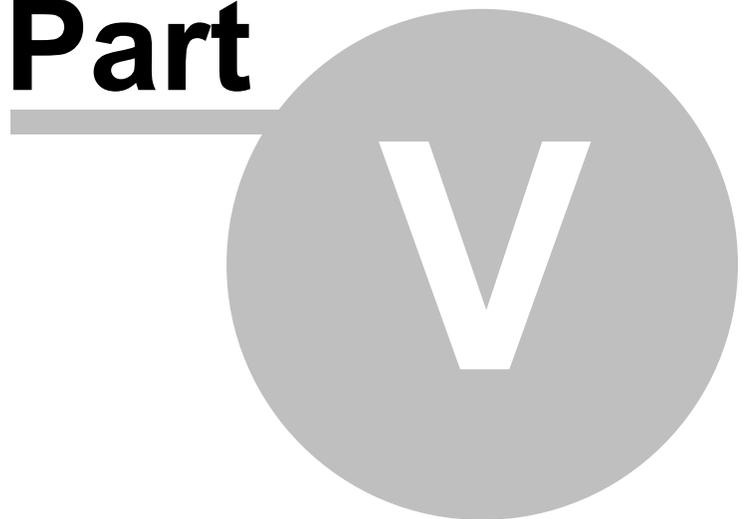
The database report writer can be a very powerful tool in the hands of an expert user. You can even build a report with two data sources in a master-detail relationship. For example, the master level can be a list of keywords and the detail level a list of all references containing a specific keyword. There are a few sample reports that group references by the following fields: Author, Journal, Folder, Keyword, Year.



# Taking notes

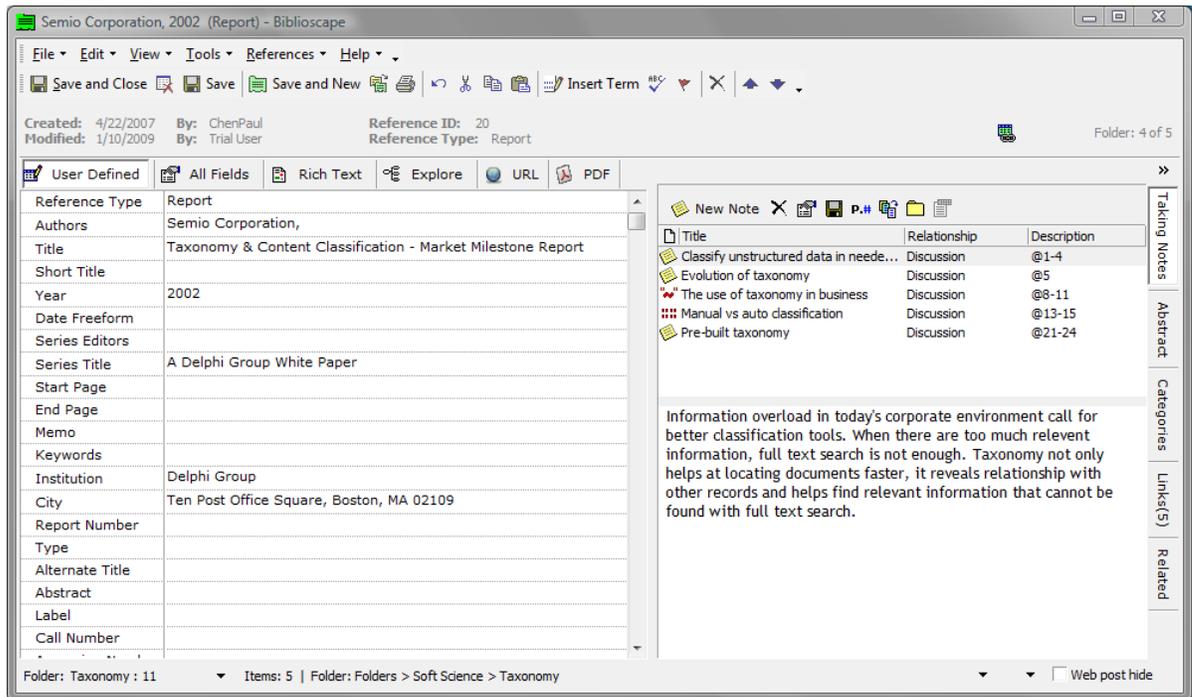
"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part

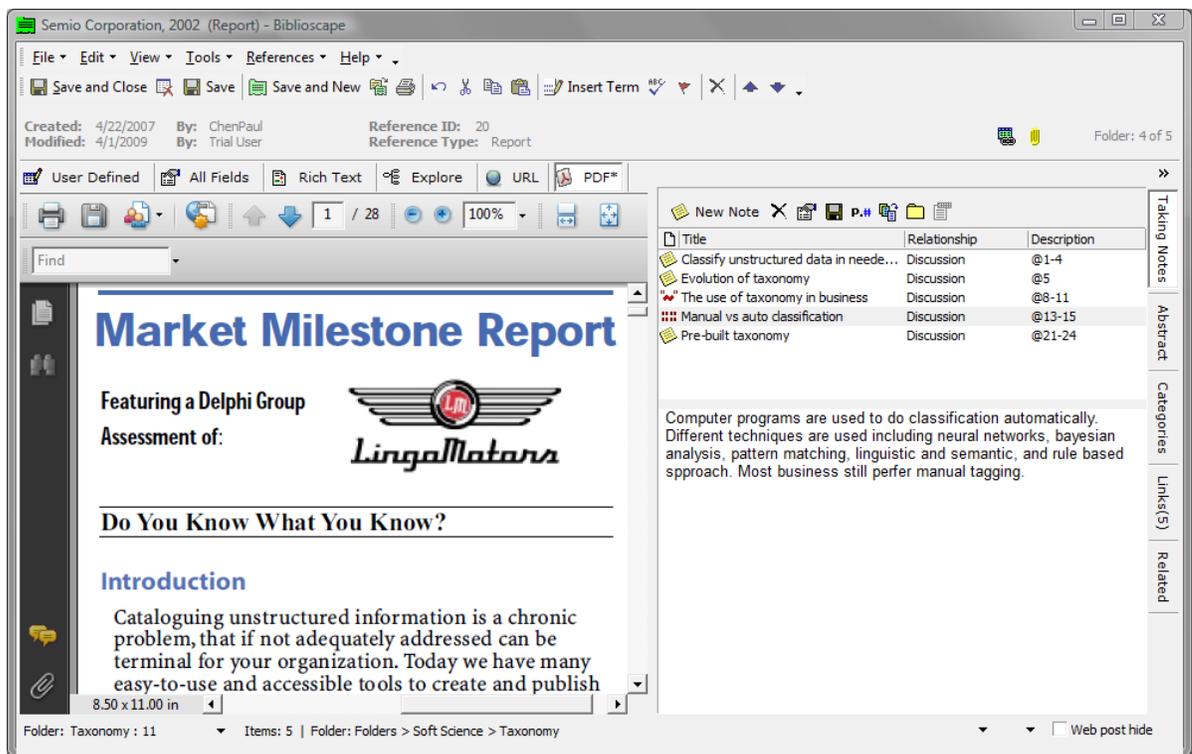


## 5 Taking notes

Note taking is the heart of research. Taking quality notes not only saves you time so you don't have to read the source again and again, but it will also make writing your first draft a lot easier. In the old days, notes are written on index cards. A note card contained bibliographic information such as author name, year published, and relevant page numbers, plus the note itself. It was recommended to write one item per note so note cards could be shuffled and re-arranged in the organizational stage to help you develop an outline. In the age of computers, researchers usually save notes in a word processor file. People either save all their notes in a single file or save each note in a separate file. Both approaches require a lot of copying and pasting when you need to use your notes. The notes are separated from bibliographic records, so it also takes time to find your notes when you work on certain source material. The advantage of using Biblioscope to take notes is the tight integration between your notes and the corresponding bibliographic record.



In the reference editor, if you have the full text of the source in PDF or HTML, you can view the full text on the left panel and take notes on the right panel. All the notes taken about the source will be listed on the right.



Taking notes in Biblioscape also has other advantages. You can categorize your notes easily with drag and drop. Retrieving categorized notes is easy by clicking a category item on the right. If you have access to the composition module, you can organize your notes into an outline by using drag and drop. If you prefer using a word processor, you can shoot saved notes into your word processor along with related temporary citations. Once finished, Biblioscape can convert the temporary citations into formatted citations and generate a bibliography.

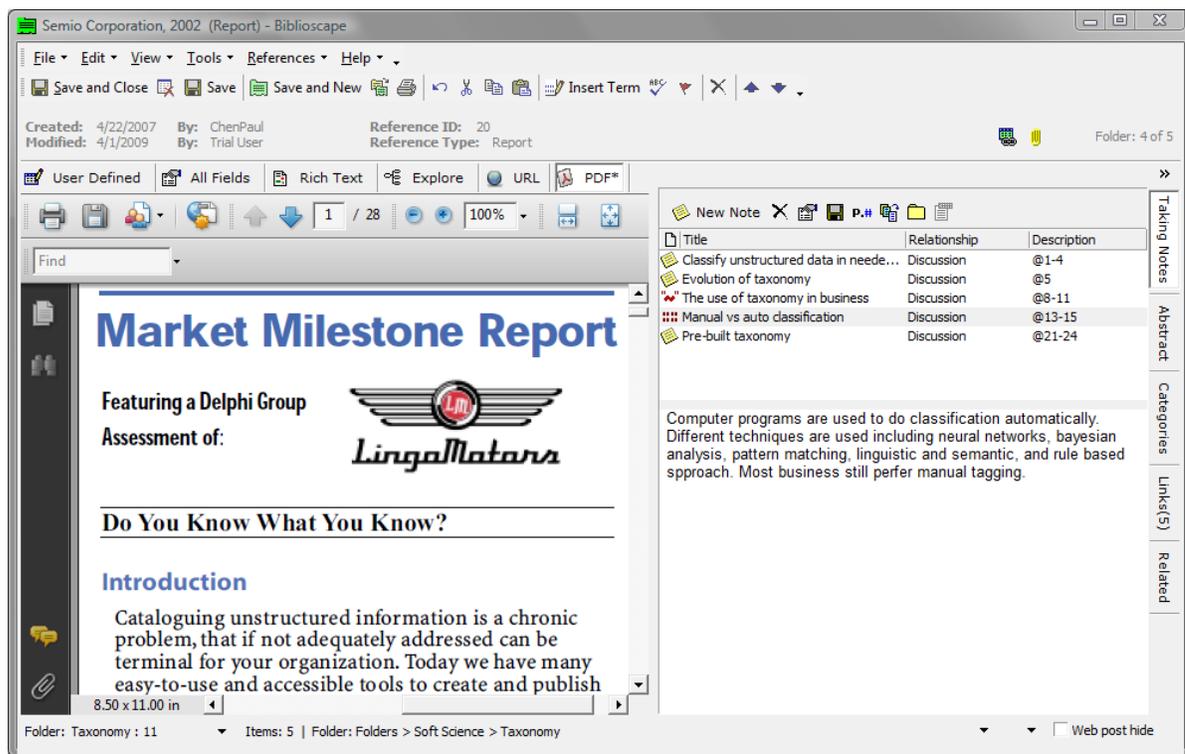
## 5.1 Create a note

In Biblioscape, there are several ways to add new notes. When you read a reference's full text inside Biblioscape or on paper, you are likely to write down quotes, comments, and ideas about what you read. In the Biblioscape reference editor, you can display the full text on the left panel, and take notes in the right panel. At the brainstorming stage of your writing, you can turn on the notes Quick Add and enter new notes continuously. If you use the Biblioscape built-in browser, you can capture a web page or part of a web as a note. Lastly, you can click the "New Note" button to add a note directly.

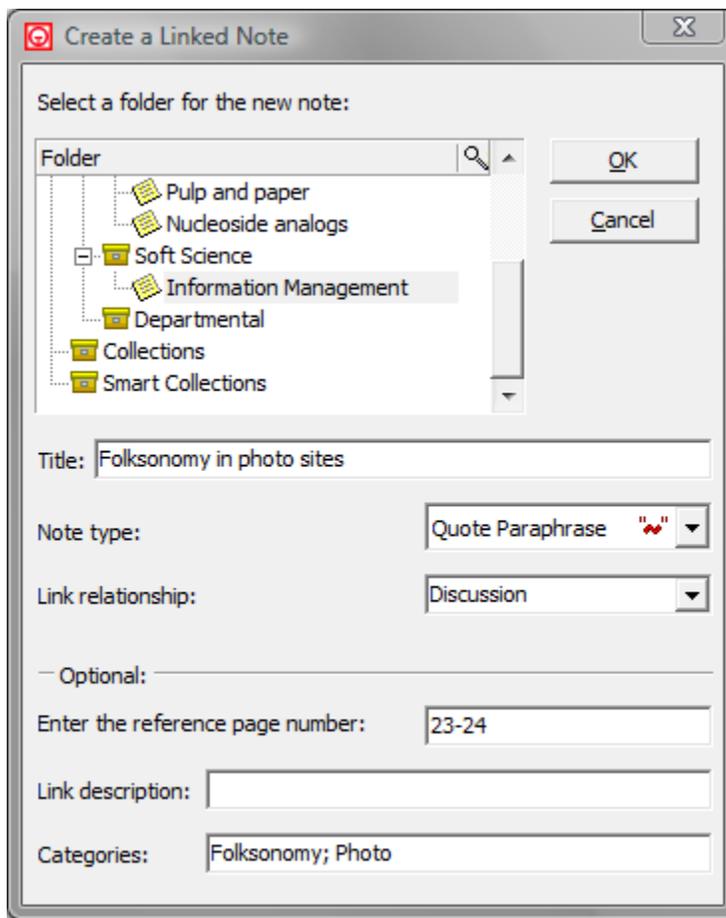
### Annotate while you read

After collecting references for your projects, you enter the stage of reading and digesting your sources. Taking quality notes is very important. The time you spend on note taking will pay off down the line with less review time and increased retention. When you take notes in Biblioscape, each note is stamped with a creating date. When you edit a note, the date of modification is also

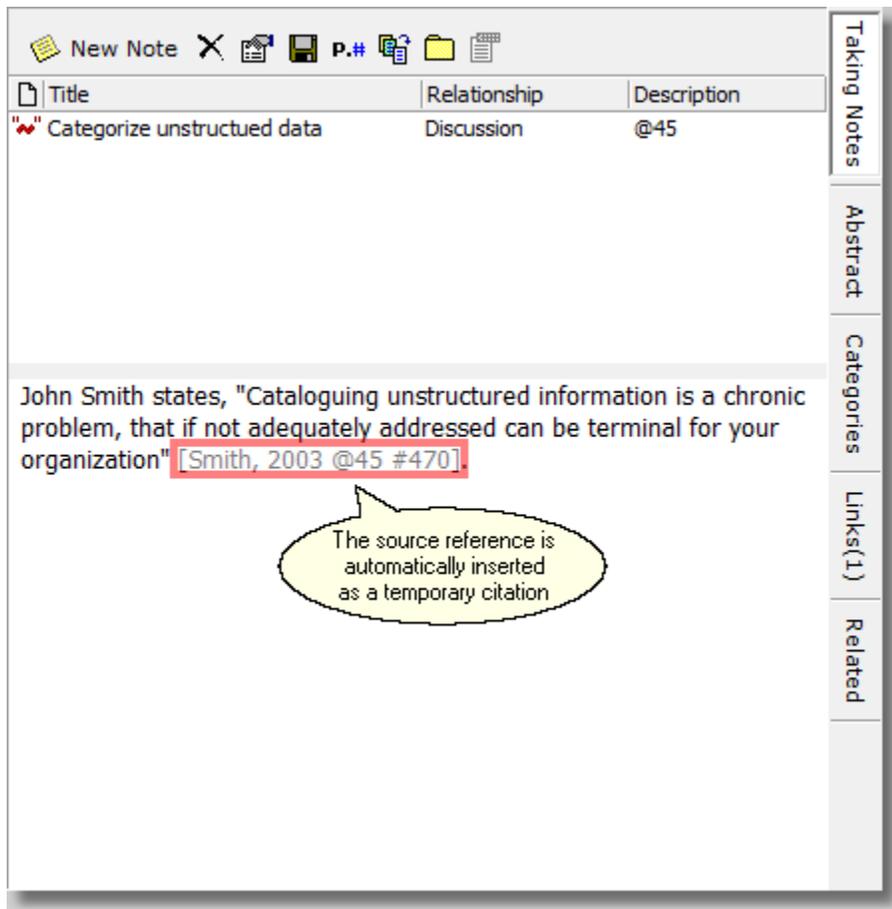
stamped. First, open your reference in the reference editor. If you have the full text URL or have the PDF file path in the attachment field, you can read the full text on the left.



When you are ready to take a note, click the "Taking Notes" tab. Then click "New Note" button. First select a note folder if the default one is not what you want. Enter a title for the new note. You need to select a note type. This is important because it will tell you if the note is a direct quote, a paraphrased quote, a summary, or if it is your own idea. The "Link relationship" describes the nature between your source and your note. If your note is about an argument that contradicts what is said in the source, you can choose "Contradicts". There are other options. You can also edit the list by editing the file "...\Biblioscope x\Global\link\_relationship.txt". The bottom 3 edit boxes are optional. If your note is about certain text in your source, you should record the page number. You can add a link description if you have a comment about this link. This could be anything about the link. Writing quality notes is essential, and retrieving your notes is also important, so you should categorize your notes. You can drag and drop your notes in the notes module. You can also categorize your annotation notes manually when they are created. Separate each category by "; ". If the category does not exist in your database, Biblioscope will add it to the "New Categories" folder.



After clicking the OK button, the new note will be added. Bibloscape will add the source as a temporary citation because you should cite the source if the note is a direct quote, a paraphrased quote, or a summary. The placement of the temporary citation depends on the style your writing follows. For example, if you follow the MLA style, you should put the temporary citation in the end, like: John Smith states, "Cataloguing unstructured information is a chronic problem, that if not adequately addressed can be terminal for your organization" [Smith, 2003 @45 #470]. If you follow the APA style, you should put it near the beginning, like: The author [Smith, 2003 @45 #470] states, "Cataloguing unstructured information is a chronic problem, that if not adequately addressed can be terminal for your organization".



### Capture your thoughts during brainstorming

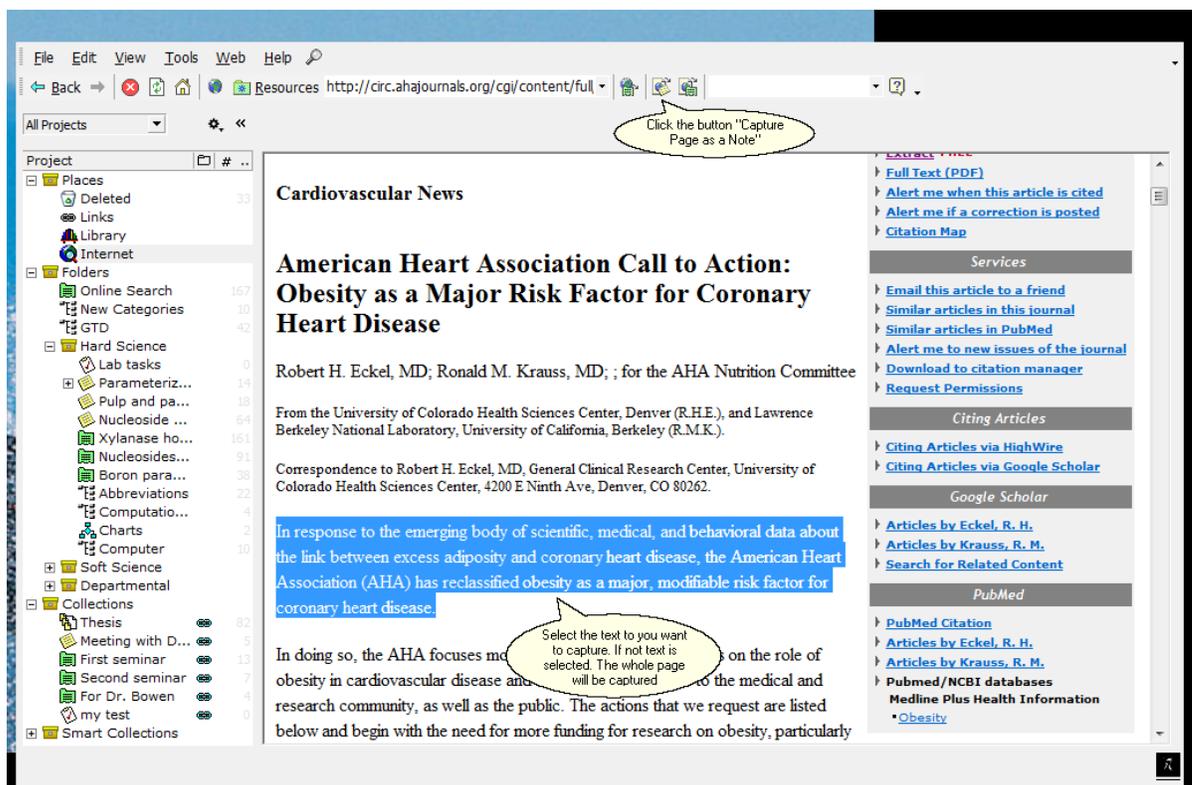
After receiving your writing assignment, you need to decide what you should write. If you are given a topic, you need to come up with ideas about the topic. If you have an open-ended assignment, you need to consider your passions and interests, and list potential topics. When you brainstorm, you let yourself think freely. You need to come up with lots of ideas and not be bothered by the details. You can do this in the Biblioscape notes module. Go to a notes folder and turn off the Quick Add feature. Start typing your ideas. After each idea, press the Enter key and start typing the next one. Do not stop until you have emptied your head. Then, you can enter the details of each note and re-arrange the order or create parent child relationships by using drag and drop.



Another place to use brainstorm to add notes is in the composition module. The composition module is designed to write theses and books. In the composition module, you can use brainstorm in a similar way to come up with outlines for your writing. We will cover the composition module in another chapter.

## Capture content from the Web as new notes

When doing research on the Web, you may need to capture a web page or part of a web page for future reference. If you use the Biblioscape built-in web browser, you can capture a web page either as a reference, so you can cite it in your writing, or as a note. To capture part of a web page as a note, first select the text you want to capture. Then click the toolbar button "Capture Page as a Note". A new note will be created. The web page's title will become the note's title. The selected text will be added to the note's content. The web address will be added to the note's Web URL field. If you want to capture the whole web page as a note, do not select any text and click the "Capture Page as a Note" button. Biblioscape will save the web page as a Web Archive file and put it under the "Attachment" folder under your database folder. You will still have a record of that page even if it become unavailable in the future.



## Add a note using the note editor

If you need to write down a piece of information that is not related to a reference, you can go to a notes folder and click the menu command "Notes | New Note". Enter a title first. You can select a note type if needed. Each note type is associated with a different icon. Assigning a note type is optional. Enter the content of your note in the Note tab. A standard set of formatting toolbar buttons is available at the top. There are several tabs on the right. Clicking on the "References" tab will display your reference collection by folder or by collection. You can also perform a search. You



3. Bibloscape includes special routines to import notes from certain applications like Scholar's Aid. In such cases, click the "Other Applications" tab, and select the desired application. For all other files like plain text, MS Access, Excel, Paradox, DBase, XML, etc. select the "Wizard" tab and click the Start button to run the import wizard.
4. Select the file format of the data you would like to import and click the Next button.
5. Depending on the format you select, you must specify the delimiter, date time format, etc.
6. The next important step is to map the text in your file to the data fields of your database. Depending on the file format, Bibloscape will make a guess; you can then fine tune the mapping.
7. After finishing the last step of the import wizard, click the Execute button to start importing.

### Export notes

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You can export notes in different formats depending on your needs.

1. Go to menu command "File | Export". All records in the current list view (folder or search) will be exported.
2. Click the Browse button, select the directory for the exported file, and give the export file a name.
3. Click the Start button to run the export wizard.
4. Select the export format and click the Next button.
5. Specify custom options for data exporting. The options depend on which export format is selected.
6. Depending on the export format selected, you can specify the delimiter, date time format, etc.
7. Select which data fields to be included in the export.
8. Select the desired layout of exported data. The exported records could be in a table format with one field per column, or in a tabular form.
9. In the last step, click the Execute button to start the export.

### Transfer notes from one database to another

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If you need to transfer notes from one database to another (for example, from your home PC to

work PC), it is best to use the export wizard to export notes in Paradox format. Copy the exported files (\*.DB and \*.MB) to the other computer. In Biblioscape, run the import wizard and select the Paradox \*.DB file. You can use all the default settings. All the fields will be mapped automatically.

## 5.3 Use notes in your writing

After reading the source and accumulating enough notes, you are ready to write the first draft. You are likely to write your first draft in a word processor. Biblioscape provides easy ways to transfer your notes from Biblioscape to your favorite word processor. The Biblioscape composition module provides another way to write your first draft. It supports content reuse and outlining by using drag and drop.

### Transfer notes to a word processor

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If you use Microsoft Word or Corel WordPerfect, you can shoot a note or select text in a note to be moved to your word processor. But, if you have a large screen, it will be easier to drag and drop notes from Biblioscape to your word processor document.

#### Shoot note

1. In the notes preview pane or notes editor, select the text you want to transfer. If no text is selected, the whole note plus its title will be included.
2. Click the menu command "Edit | Shoot Notes" or press Ctrl+S to shoot the selected text into your word processor document.

#### Transfer notes by drag and drop

1. In the notes preview pane or note editor, select the text you want to transfer.
2. Hold down the Ctrl key and drag the selected text into your word processor document.
3. Drop the selection at the desired position in your word processor.

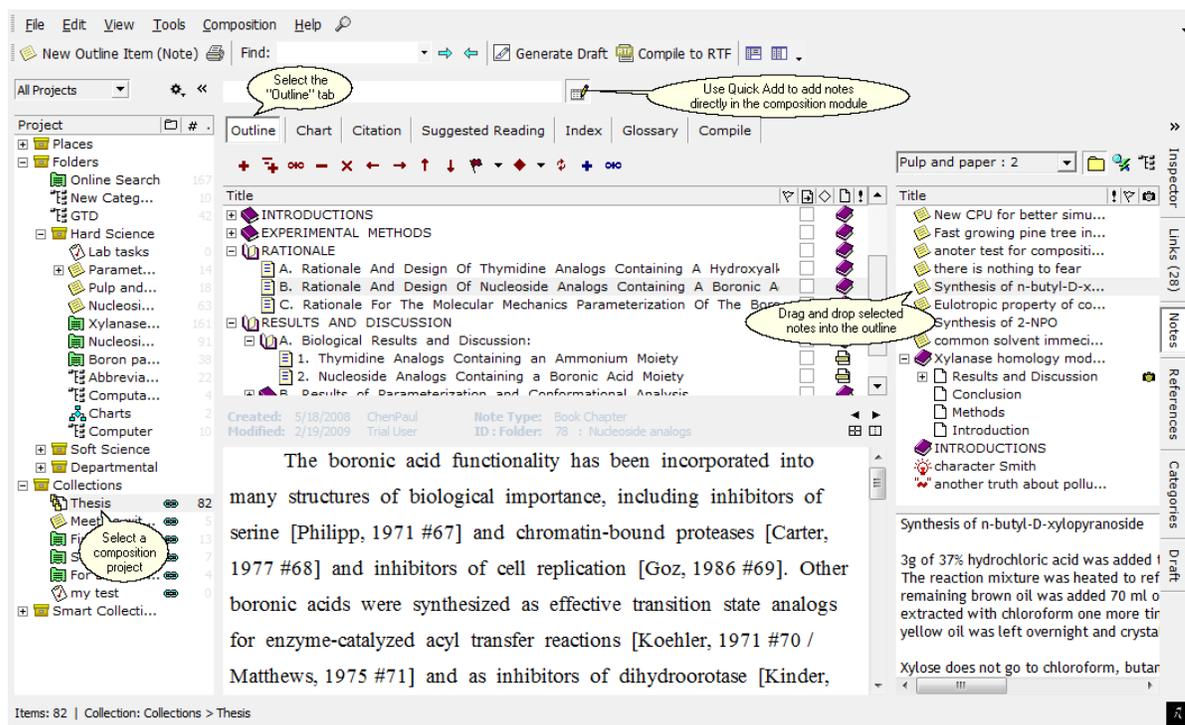
If there are references linked to the note, the linked references will be added after the selected text in the form of temporary citations. For example, if reference "Smith, J. K. 2003" is linked to the note and the selected text is "This is my first transfer...". The dropped text will become "This is my first transfer... [Smith, J. K. 2003 #439]". When you link the note to a reference, if a page number is added to the link description field, Biblioscape will include the page number as the Cited Page in the temporary citation. So, the dropped text will become "This is my first transfer... [Smith, J. K. 2003 @23-25 #439]". Beware that the Cited Page will not be used unless the output style you have selected supports the cited page. If more than one reference is linked to the note, all will be included as multiple citations separated by " / ". For example: "This is my first transfer... [Smith, J. K. 2003 @23-25 #439 / Bowen, D. 2005 #390]".

### Drag and drop text to a note

You can drag and drop text from other applications that support inter-application drag and drop into a note. First, move the cursor position to the place you want the text to be dropped to in the Biblioscape note. Next, select the text in the other application, and drag and drop it to the Biblioscape note.

### Assemble notes in the composition module

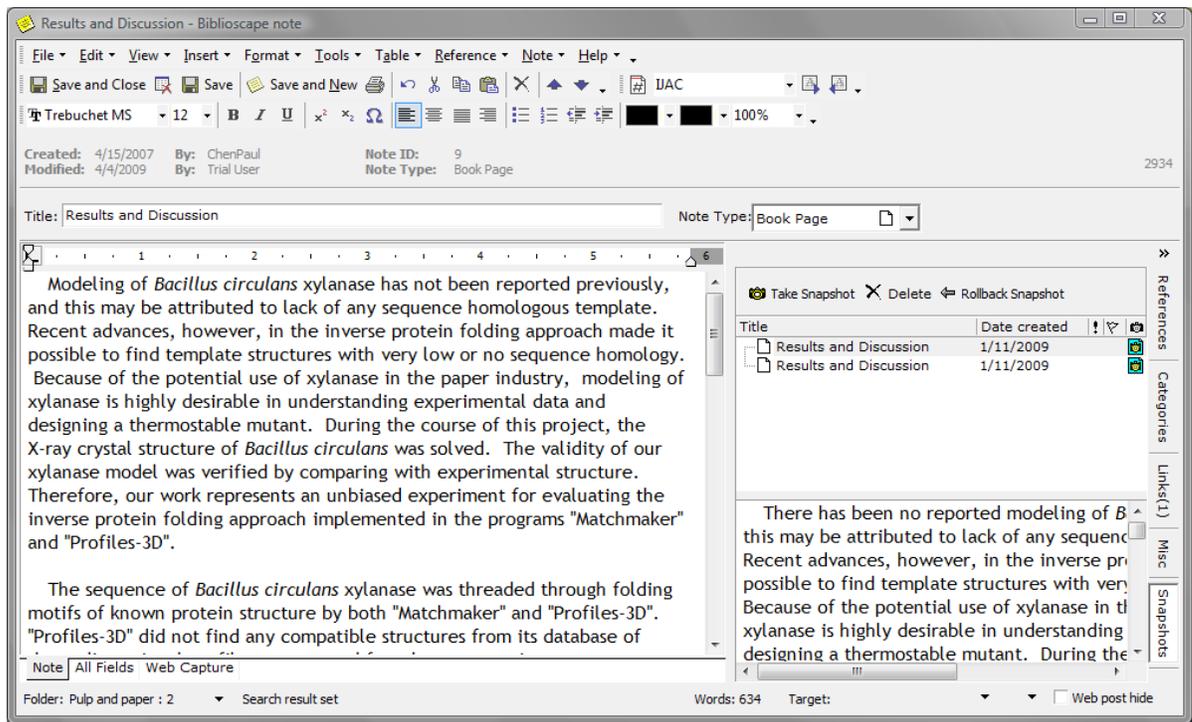
The Biblioscape composition module is designed for thesis and book writing projects. When working on a big writing project, you may have thousands of notes. It will be much easier to organize your notes inside Biblioscape to create the first draft. Creating an outline with individual notes will be much faster than doing copy and paste in a word processor. Click the "Notes" tab on the right; you can open a notes folder, collection, smart collection, or you can search notes using Fast Search. You can then select the notes you want and drag and drop them into the outline of your composition project. It is also easy to add a new note directly into the outline and to do the writing in the preview panel. The composition module will be explained in detail in the next chapter.

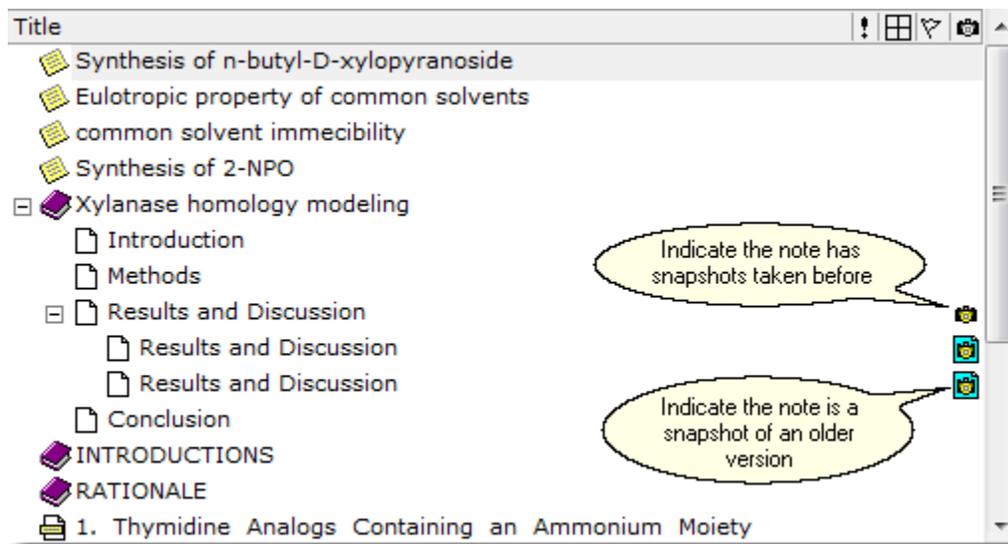


## 5.4 Note versioning

When you write, you may want to experiment with different ways to present your ideas. In a

traditional word processor, you have to save your writing experiments as different files. Moving back to an old version or comparing different versions involves several steps with extra work. In Biblioscope, the problem can be solved with note versioning. In the note editor, go to the tab "Snapshots". Click the button "Take Snapshot". This will create a new note as the child note of the current one. The new note will have the same content as the current one, and will be stamped with a date. You can then make changes to the current note. Later, if you are not happy with the changes, you can go back to the original note by clicking the "Rollback Snapshot". If there are old snapshots that are no longer needed, you can click the "Delete" button to delete them. To compare a snapshot with the current note, you can resize the window and the panel divider to make two notes show up side by side.





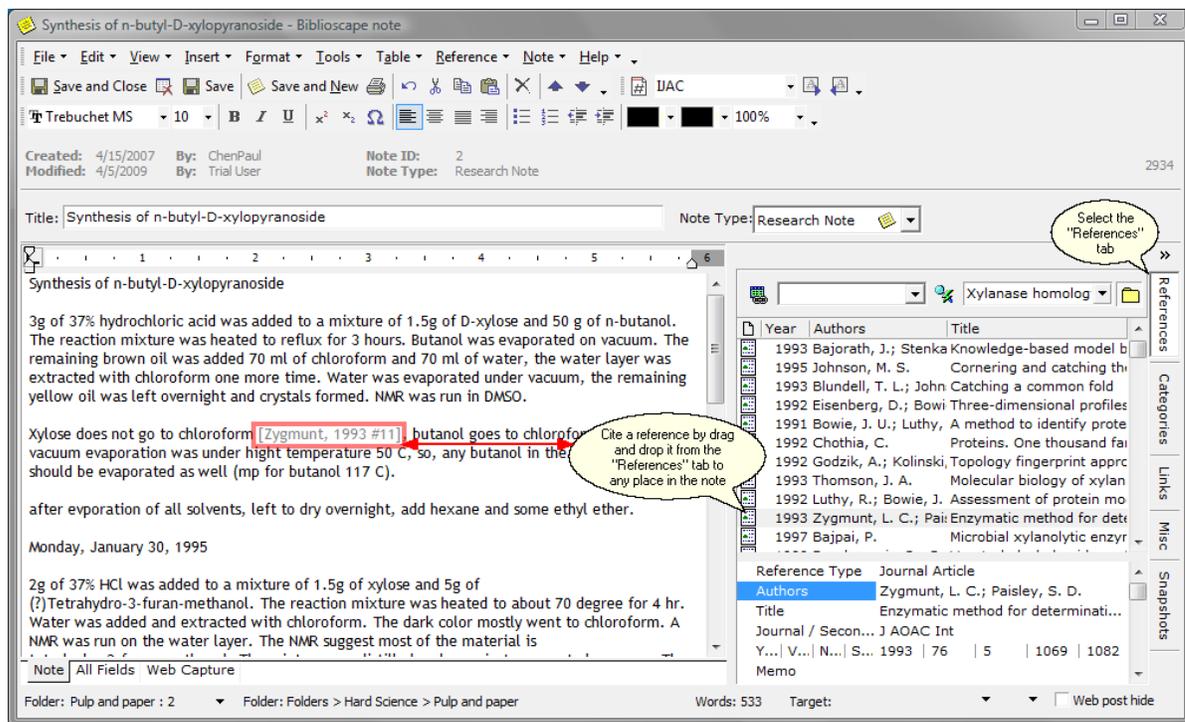
In the notes module and the composition module, there is a snapshot column. If a note has snapshots, a camera icon will be shown in that column. Under that note, there are child notes marked as snapshots using a different icon.

## 5.5 Note editor

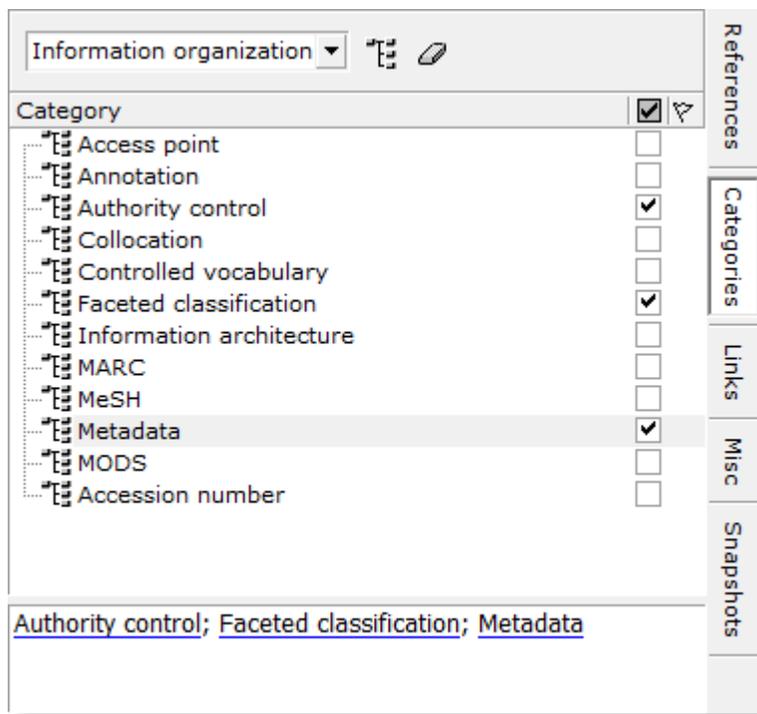
The Biblioscape note editor is a simple word processor. All the commonly used formatting buttons are available at the top. We will not go into detail about these features. Since the notes module is integrated with the references and categories modules, you can easily insert temporary citations, generate formatted citations and a bibliography, or categorize a note. Also, the link command allows you to link the current note to any references, notes, or tasks in your database.

### [Insert references as temporary citations](#)

When you write or review a note, you are likely need to check some reference or insert some references as citations. You can do all this without leaving the note editor. Click the "References" tab on the right. You can then go to a references folder, collection, or smart collection. You can also run a Fast Search to find the references you want. The reference will be previewed at the bottom. If needed, double click it to open the reference in its own editor. To cite a reference, just drag and drop it to any place in your note.

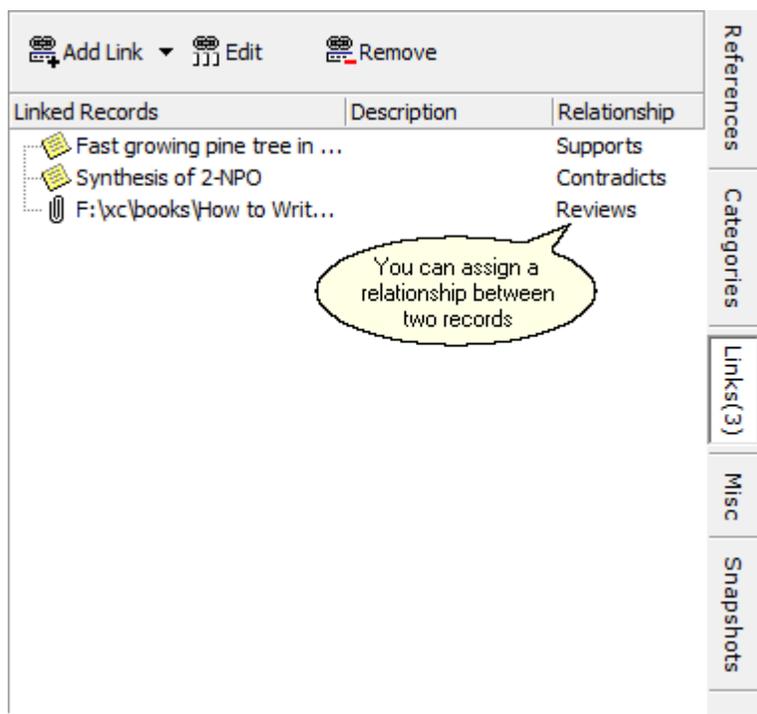


### Categorize a note



When the number of your notes grows to thousands, categorizing will be very important. A full text search will not solve the whole problem, because you may not know the right words to use for your search. Categorizing will not only help you browse records, but it can also help build better queries. In the notes module, you can drag and drop selected notes to a category on the right. In the note editor, click the "Categories" tab; you can click a category to tag a note. All the tags are displayed at the bottom.

## Link to other records



Besides tagging a note with categories, you can link a note to any other record. Linking lets you establish a relationship between two records. You can link a note to another note, a reference, a task, a chart, a project item (folder, collection, smart collection), a file, an URL, or just plain text. For example, if you take two notes, one of them is about an argument that could be used in your writing, and another note has some examples to support this argument, you can create a link between the two notes and assign "Supports" as their relationship.

See also: Assign categories as metadata

## Bookmark and hyperlink

In the notes module, Bibloscape supports the use of bookmarks and hyperlinks. This allows you to make selected text clickable and take you to a web site, a bookmark in the same note, a file, another record in the same database, etc.

### Bookmark

To create a bookmark, select the text and go to menu command "Insert | Bookmark...". The selected text will be used as a bookmark name; you can type other names if you want. Click the OK button to create a bookmark. Bookmarked text will be marked with a green underline.

To edit or delete an existing bookmark, select the text marked as bookmark, and go to menu command "Insert | Bookmark". The existing bookmark name will be shown. You can type another name and click the OK button to rename it, or press the backspace key to erase the name to delete the bookmark.

### Hyperlink

To add a hyperlink, select the text and go to menu command "Insert | Hyperlink...". The add

hyperlink window will be shown. You can link to the following destinations:

- World Wide Web: Enter the URL in the address box.
- File: Click the File button and select the file you want to link to.
- Bookmark: After clicking the bookmark button, all the bookmarks in the current note will be listed. You can then select an existing bookmark to link to.
- Reference: Click the Reference button and select the reference you want to link to.
- Note: Click the Note button and select the note you want to link to.
- Task: Click the Task button and select the task you want to link to.
- Chart: Click the Chart button and select the chart you want to link to.
- Category: Click the Category button and select the category you want to link to.
- Folder: Click the Folder button and select the folder you want to link to.

When creating a hyperlink to a reference, note, task, chart, category, or folder, you have the option to create a record to link to as well. Click the "Link to Record" button and add a record to record link by clicking the "Add Links" button. If you just want to create a hyperlink, please click the "Add Hyperlink" button.

After the hyperlink is created, the text will be shown with a blue underline. Double clicking the hyperlink will take you to the item linked. If it is linked to an WWW address, the web page will be opened in your default browser. When linked to a file, the file will be opened if there is an associated application with that file type. When linked to a bookmark, users can double click the hyperlink text, and the cursor will jump to the the linked bookmark. When linked to a reference, note, task, charts, category, or folder, the linked record will be opened in a separate window.

To edit or delete a hyperlink, select the text and go to menu command "Insert | Hyperlink...". Change the hyperlink address to edit it. If you make the address blank and click the OK button, the hyperlink will be deleted.

# Writing papers, theses, and books

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

**Part**



**VI**

## 6 Writing papers, theses, and books

One of the main features of Biblioscape is to help users do academic writings. When you start to write a paper, thesis, or book, you need two things: the references you have collected during research, and the notes you have accumulated when reading those references. Biblioscape provides easy access to your references and notes through folders, collections, and smart collections. If you have also used categories to organize references and notes, you can have more flexible ways to access your collections.

If you prefer to write in Word or WordPerfect, Biblioscape allows you to shoot selected references directly into your word processor. You can also access Biblioscape commands within Word or WordPerfect through add-ins and macros. Biblioscape notes can be directly sent to Word or WordPerfect as well. The linked references to a note will be included as temporary citations. When you are finished writing, just chose a style among 1,000 plus pre-built journal styles and let Biblioscape generate the formatted citations and a bibliography. All major styles are supported. Biblioscape can generate citations in footnotes as well.

When working on a big writing project, you may prefer to use the Biblioscape composition module to easily build an outline by using drag and drop. With notes versioning, you can experiment with different ways to express your ideas without the fear of losing your older versions. You can compare old versions side by side and roll back easily. Biblioscape lets you create an index, suggested reading list, and glossary easily all within the composition module. In the compiled draft, your outline will be turned into a table of contents.

### 6.1 Format a manuscript

When a researcher writes a paper for publication, he or she cannot avoid citing works done by others. If there is only one rule to cite previous works, there will be probably no need for bibliographic software to exist and writing will be less time consuming. Unfortunately, there are thousands of styles used to cite references. Almost each journal has its own unique rules. To make things worse, a researcher submits different papers to different journals, so he or she has to remember several sets of rules regarding citing references. The same paper may also have to be submitted to more than one journal for publishing in case it is rejected by a journal's editors.

Bibliographic software was first born in the late 1970s and early 1980s to solve the problems mentioned above. Instead of remembering citation rules from different journals, you just insert temporary citations in your manuscript and let the bibliographic software to do the tedious work for you. The software will generate formatted citations and a bibliography.

## 6.1.1 Insert temporary citations

The 3 main functions of the Biblioscape references module are: collect, manage, and publish. Formatting citations and generating a bibliography are the key features of publishing. If you have never used bibliographic software before, you need to know the following concepts.

### Temporary citation vs formatted reference

If you want Biblioscape to generate citations and a reference list, you have to insert temporary citations and let Biblioscape scan the manuscript once you are finished writing. Alternatively, you can directly copy and paste formatted reference from Biblioscape, but the manuscript cannot be easily converted to another style. You may also have to make changes manually. For example, some styles require an author names to be formatted differently when it appears the second time.

### Footnote citation vs in-text citation

In most cases, temporary citations are inserted as in-text citations. But, for styles in the fields of arts and humanity, the formatted reference appears in the footnote or endnote. You have to insert temporary citations in footnotes. This is supported by Biblioscape, but you have to use an output style that starts with "\*" in the style name. For example, "\*MLA (notes)".

### Copy vs shoot vs drag-and-drop

With Biblioscape, you can copy or shoot temporary citations (Ctrl+T for copy and Shift+Ctrl+T for shoot) as well as formatted references (Ctrl+B for copy and Shift+Ctrl+B for shoot). To insert temporary citations by using drag-and-drop, you have to use BiblioSidekick which resides under "...\Biblioscape X\Tools\BiblioSidekick.exe".

### Copy temporary citations

Select the record you want to cite and go to the menu command "Edit | Copy Temporary". You can also press shortcut keys Ctrl+C or Ctrl+T. Go to your word processor and press Ctrl+V to paste it. If you need to cite more than one reference, select the references while holding down the Shift or Control key. Each reference will be separated by " / ". For example: [Smith, K. 1998 #323 / Bowen, P. 2001 #211 / Wyrick, S. 1995 #466].

### Copy formatted references

Sometimes, you may need to insert a fully formatted reference to the text of other programs. You have to understand that by using formatted references, Biblioscape will not be able to format your document. Biblioscape can only format a document with temporary citations. With formatted references, you have to make formatting changes manually if there is such a need. To copy fully formatted references, please follow the steps described below:

1. Select reference(s) in your Biblioscape database.
2. Go to menu "Edit | Copy Formatted" (shortcut Ctrl+B), or click on the toolbar button "Copy

Formatted”.

3. Switch to the other program and go to “Edit | Paste” or hit Ctrl+V to paste the formatted reference(s).

How the record is formatted depends on the style you selected in the Bibioscape toolbar. You can use the combo box on the Bibioscape references module toolbar to switch to another style. To view how a record will be formatted, select the "Formatted" tab on the preview panel.

Note: To insert the formatted reference to the footnote or endnote of your Word or WordPerfect document, please go to "Edit | Shoot | Shoot Bibliography to Footnote" or "Edit | Shoot | Shoot Bibliography to Endnote". Please choose your default word processor by going to "Tools | Options".

#### [Shoot references from Bibioscape to Word or WordPerfect](#)

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Bibioscape can work with Microsoft Word or Corel WordPerfect by letting users transfer references directly into the active document without the need to copy and paste. There are several such menu commands listed under "Edit | Shoot". To let Bibioscape work with Word, please go to "Tools | Options". On the "General Display" tab, make sure "winword.exe" or its full path is listed under "Default word processor". To make Bibioscape shoot references to WordPerfect, please enter "wpwin.exe" or its full patch under the "Default word processor". Before using the "Edit | Shoot | ..." commands, please make sure the selected default word processor is running.

#### **Shoot Temporary**

The temporary citation of selected records will be transferred to the active document at the cursor position. Temporary citations will be converted to formatted citations along with bibliography generated at the end of the document when you format the document with Bibioscape. If you don't want to use Bibioscape to format your manuscript, you can use the Word or WordPerfect built-in endnote and footnote feature to handle your citations. The following commands can be used in such cases.

#### **Shoot Formatted In-text Citation**

The formatted citation of the selected record will be transferred to the active document. The command is only useful when the currently selected output style uses author-date for in-text citations. You can change the active output style by using the combo box on the main toolbar.

#### **Shoot Bibliography to Footnote**

A new footnote will be added in your open document at the cursor position. The bibliography of the selected record will be inserted into the footnote. The bibliography will be generated according to the active output style selected on the main toolbar. You should use an output style with the author-date format, otherwise another number will be added after the footnote sequence number. You can edit an output style by going to "Tools | Styles | Output Styles...".

### Shoot Bibliography to Endnote

A new endnote will be added in your open document at the cursor position. The bibliography of the selected record will be inserted into the endnote. The bibliography will be generated according to the active output style selected on the main toolbar. You should use an output style with author-date format, otherwise another number will be added after the endnote sequence number. You can edit an output style by going to "Tools | Styles | Output Styles...".

### Shoot Selected Text

In Biblioscape, you can select text in the Abstract, Notes, Document fields on the reference editor. Then, use one of the Shoot commands listed above. Biblioscape will shoot the selected text, and do the other things accordingly. For example, if you have selected some text in the Notes field, go to "Edit | Shoot | Shoot Temporary". Biblioscape will shoot the selected notes and then create a temporary citation next to it. If you go to "Edit | Shoot | Shoot Bibliography to Footnote", Biblioscape will shoot the selected text, then create a footnote and fill the footnote with a formatted bibliography of the current record according to the output style selected.

### Drag-and-drop temporary citation with BiblioSidekick

BiblioSidekick uses a small window to let users browse and search bibliographic records. The BiblioSidekick window can be shown as "Always On Top", so both your word processor and bibliographic records are displayed. You can then drag the reference you want to cite at the desired position in your document, and a citation tag is automatically added. You can then generate a formatted document with Biblioscape. We see this as a further advancement compared to "Cite While You Write", we call it "Drag While You Cite". To run BiblioSidekick, double click "... \Biblioscape X\Tools\BiblioSidekick.exe".

Tip: In BiblioSidekick, you can double click a record to open that record in a simple editor. You can press any letter to jump to a reference with Authors that start with that letter. You can actually keep typing until a desired match is found. For example, if you continuously type "sm", BiblioSidekick will jump to the record with Authors that start with "Sm" like "Smith".

## 6.1.2 From temporary citations to formatted document

I can safely say that all of us start writing papers without using bibliographic software. When you first write a research paper or thesis in college, your professor will tell you what citation style you should follow. The most popular ones are APA, Chicago, MLA, Turabian, etc. You have to remember some rules about the style you use. Since some styles have very detailed and complicated rules about how citations and references should be formatted, it can be quite time consuming. It is even worse when you have to cite the same reference later when writing another paper. Since each journal has its own style requirement, it is very likely you have to type the same reference again in another format.

### Enter once and cite many times later

---

Bibliographic software is built to solve this problem. You enter a reference into your Biblioscape database. When you are ready to cite a reference while writing a paper, you can enter a temporary citation with ID text to uniquely identify it, instead of entering the reference in a formatted form. A temporary citation looks like this: [Smith, John 2001 #341]. Once you are finished writing, you can feed your manuscript into Biblioscape and specify the style you want to use like APA, MLA, etc. Biblioscape will convert temporary citations into formatted ones according to the style you picked. A reference list will also be generated at the end of the manuscript according to the style's specifications. Compared to the traditional way of writing a paper, Biblioscape brings 3 main benefits.

1. You no longer need to remember some complicated rules when citing references. Biblioscape will do the hard work for you.
2. In case your paper needs to be submitted to another journal, you can just tell Biblioscape to use another style. All citations and reference lists will be regenerated instantly.
3. You only need to enter a reference once manually or by importing. The same reference can be cited many times in different papers.

### Format an RTF file with temporary citations

---

One of the main functions of Biblioscape is to generate citations and bibliographies for your thesis, papers, etc. Biblioscape generates bibliographies according to the rules of scientific journals. To do this, you need to insert a temporary citation tag where a reference needs to be placed (for example: [Smith, J. 1994 #213] or [#smith 1994]).

1. First, select the references in Biblioscape, then click on menu command "Edit | Copy Tag". Then, go to your word processor document and paste it. After you finish writing, save your document in a Rich Text Format (\*.rtf) file.
2. Switch to Biblioscape, click on menu command "Tools | Format Manuscript". Then click on the "Browse" button and select the RTF file you want to format.
3. Select the desired Style.
4. If you want to publish on the Web, select HTML as the "File Format", otherwise keep RTF checked.
5. Press the "Start" button. Biblioscape will convert the tagged document into a formatted document with properly formatted citations and a bibliography.

---

### Temporary citation matches

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During the formatting of a paper, Bibloscope extracts the temporary citations in the paper, and searches the database to find records that match each of the citations. If Bibloscope can't find a match, it will insert ((reference not found)) into the place of the temporary citation. If you use natural citation styles as temporary citations, Bibloscope may find more than one record that matches your search text. Bibloscope then prompts you with all the matches, and lets you pick the reference you want.

---

### Sub-style not defined for reference type in the selected style

---

During the formatting of a paper, Bibloscope will use the format filter that matches the reference type of your temporary citation. If such a match can't be found, Bibloscope will prompt you to use the default format filter to format the reference involved. For example, if you cited a reference of the type "Conference Proceedings", and "Conference Proceedings" is not defined in the style you selected, you will be presented with the option to format it as a "Journal Article".

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### Format and unformat an HTML file with temporary citations

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Bibloscope can also format and unformat a HTML document. You should follow the same procedures as described above. Bibloscope will create a hyperlink automatically between in-text citations and its corresponding reference in the bibliography section.

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### Journal submission and hidden text

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When converting temporary citations to formatted citations and a bibliography, Bibloscope adds hidden text around formatted citations and the bibliography. So if needed, Bibloscope can convert the document back into an unformatted document with temporary citations. Hidden text can cause problems with publishing software used by scholarly journal publishers. Bibloscope offers the option to format a manuscript without adding hidden text. In the "Tools | Options" window "Format Manuscript" tab, check off the box "Support unformat manuscript". Once your paper is accepted by a journal publisher, you may want to turn off the above option and generate a final copy without hidden text.

Tip: Bibloscope can be integrated into Microsoft Word and Corel WordPerfect. This way, users can then generate a formatted document using one click inside their favorite word processor.

Note: Each time Bibloscope formats or unformats a document, it will make a copy of the file it is going to change and save it under a different name with "\*backup\*" added. If you experience a problem with the Bibloscope formatting, you can always go to the \*backup" file to recover the original document.

### 6.1.2.1 Cite a reference

The following are a few important things to know about citing references when writing papers.

#### Temporary Citation with Reference ID

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The purpose of temporary citations is for Biblioscape to determine which record to use during the formatting of the paper. If you include reference ID in the temporary citation instead of using natural citation, you can change the author year before the pound sign “#” to any text your want. Since the reference ID is enough to determine which record to use, you can add any text before it. For example:

[Smith 1992 an interesting paper #23]

[may change #23]

#### One database Per Paper

If you have more than one Biblioscape database, make sure all the citations in each paper come from the same database. When Biblioscape formats your paper, it will only search for records in the currently opened database.

#### Reference ID

Biblioscape assigns a unique record ID to each reference as it is added to your database. These reference IDs could appear in your temporary citation to tell Biblioscape which record to use. You need to keep the following points in mind:

- Reference ID is assigned sequentially to each reference that is added to a database.
- The reference ID is never reused or reassigned within the same database. When you delete a record in database, that ID will never be used again in that database.
- If the same reference appears in two different databases, the reference ID will be different. Therefore, if you cite temporary citations from one database and format your paper with another database, it will result in error, even if all the records cited are available in both databases.

If you have to keep two databases, we recommend you use natural citations that do not use the reference ID to identify a record. This will make your temporary citations database independent.

#### Same Author and Year in Citation

While formatting a document, Different citations by the same author in the same year will be differentiated by adding “a”, “b”, “c”, etc. at the end of the citation. For example, "Smith, 1997a" and "Smith, 1997b".

#### Deleting References in a Database

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If you delete a record in your database after you have cited it in a paper, next time you format

that paper, Biblioscape will not be able to find that record if the reference ID is used for a temporary citation. Even when you add that record again into the database, another ID will be assigned to it. Therefore, you have to update your temporary citation with the new reference ID. This is another reason we recommend using natural citation.

#### [Working from Different Computers](#)

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If you work on a paper using more than one computer, you should always use natural citation. Then, you don't need to worry about the reference ID in temporary citations. Otherwise, you have to always use the same database on different computers. The best way to do this is to zip the database into a floppy disk with WinZip.

Warning: Text inside temporary citations can not be re-arranged by using drag-and-drop. Drag-and-drop operations inside temporary citations will make Biblioscape unable to format the document properly.

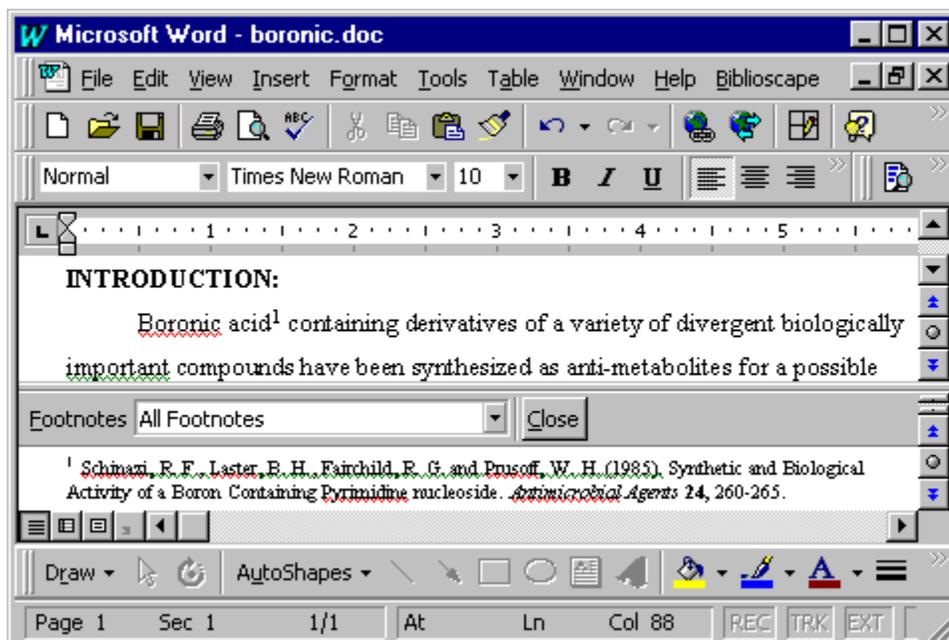
#### **6.1.2.2 Generate formatted references in footnotes or endnotes**

Biblioscape provides two ways for you to cite references in footnotes or endnotes. Which way you use really depends on the nature of your work.

##### [Shoot Formatted References into Footnotes](#)

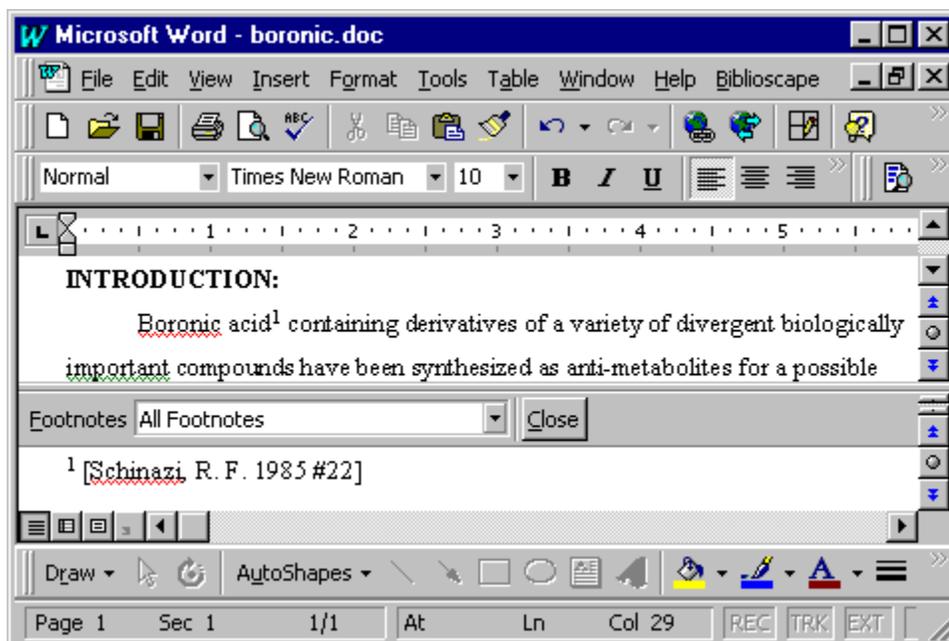
---

If your writing doesn't need Biblioscape to reformat the citations and bibliography, you can use a word processor's built-in footnote and endnote management feature. This is the easy way to cite references in footnotes or endnotes. When you are ready to cite a reference, just switch to Biblioscape. Select the reference that you want to cite, click on menu "Edit | Shoot | Shoot Bibliography to Footnote" or "Edit | Shoot | Shoot Bibliography to Endnote". Biblioscape will create a new footnote or endnote and insert the formatted reference. The way the reference is formatted is controlled by the style you have selected. The formatted reference is static. Biblioscape will not change it in any way when you format the paper to create a bibliography. It also won't change when the record itself is changed in Biblioscape.



### Insert Temporary Citations in Footnotes

You can also insert temporary citations into footnotes. When Bibloscape formats a citation in a footnote, it treats it just like any other citation it finds in the text of the document. The temporary citation in the footnote is formatted like a regular in-text citation, and the full reference is added to the bibliography. This gives you lots of flexibility by modifying a style. You can modify a style to format in-text citation any way you want, including formatting it the same way a bibliography is formatted.



### 6.1.2.3 Insert temporary citations

#### Copy temporary citation

1. When you need to cite a reference, switch to Biblioscape (Alt+Tab).
2. Select the reference(s) in your database that you want to cite and go to "Edit | Copy Temporary (Ctrl+T)". Or, press Ctrl+C.
3. Switch to the word processor (Alt+Tab), and go to "Edit | Paste" (Ctrl+V).

#### Shoot temporary citation

1. In your word processor, put the cursor at the spot where you want to the cite reference(s).
2. Switch to Biblioscape. Select the reference(s) you want to cite and go to "Edit | Shoot Citation Tag". A temporary citation will be automatically inserted into your word processor, and your word processor will become the active window. This feature works only for Microsoft Word and Corel WordPerfect.

#### Drag while you write

If you use Word or WordPerfect to write paper, you can run BiblioSidekick instead of Biblioscape. BiblioSidekick is a small utility that has a small window and can be set to always stay on top. When you are ready to cite a reference, just find it in BiblioSidekick, then drag-and-drop it into the desired position in the Word or WordPerfect document.

If you use Biblioscape's notes module to write, you can drag-and-drop a reference from the right panel to the desired position in your document.

#### Cite while you write

If you use Word or WordPerfect, you can also start a search inside your word processor. If only one reference was found, the temporary citation will be inserted automatically. If more than one reference is found, you will be prompted to pick one. To start a search, go to the Biblioscape-related menu in Word or WordPerfect "Biblioscope | Search Reference". Enter the search text and click the OK button.

### 6.1.2.4 Temporary citations

A "citation" is identifying information in the text of your paper used to find a complete reference in the bibliography. There are two types of citations. For writers in the hard science fields, citing a reference is relatively easy. Citations are inserted in-text whether they are in the form of a number or in author-date form. For writers in the fields of humanities, footnotes and endnotes are used to cite references. Biblioscape supports the use of footnotes and endnotes as well. Footnote and endnote generation is controlled by the word processor you use. You only need to insert a Biblioscape temporary citation into the footnote or endnote you have created. Biblioscape will

format them correctly and generate a bibliography list as well using the selected output style. In Bioscope, output styles for use inside footnotes or endnotes start with "\*". For example: "\*Chicago 15th A (note)".

- Footnote or endnote: A number is inserted in the text, and detailed reference information is added at the bottom of the page in the case of a footnote, or at the end of manuscript in the case of an endnote. For example: ...an enzyme that has attracted considerable interest<sup>1</sup>.
- In-text citation: In-text citation can be in the form of a number, or author-date form.
- An in-text citation consisting of a bibliography number. For example: ...an enzyme that has attracted considerable interest (1).
- An in-text citation consisting of the author and year in parenthesis. For example: ...an enzyme that has attracted considerable interest (Smith 1997).

In Bioscope, in order to generate formatted in-text citations and a bibliography, you need to insert unformatted citations called temporary citations first so the Bioscope formatter knows where to put the formatted citations and how to convert the raw data into a formatted bibliography. There are two ways to include the temporary citations.

- Temporary citation with Reference ID: Use a citation tag with the reference ID in the form of [Author Year #Reference ID]. The reference ID is a unique number for a reference record in the database.
- Temporary citation with text - Natural Citation: Use natural citation without a reference ID in the form of [#Identifying text]. This will make your temporary citation become independent from any database. During formatting, Bioscope will use the text after # to identify a record. If ambiguities arise, Bioscope will prompt you to pick the reference you want.

During the formatting of a paper, these temporary citations are converted to final citations, and the corresponding bibliography is added at the end of the paper. The selected output style determines what the final citations and bibliographies will look like. In the following section, you will learn how to change the temporary citation to suppress author name or year, add a prefix or suffix to final citations, etc.

### Natural citation

---

By default, Bioscope will use the Reference ID for temporary citations when you click menu command "Edit | Temporary Citation". If you want to use natural citation and therefore remove any dependency on the Reference ID, click menu command "Tools | Options". On the "Format Manuscript" tab, check the box Use "File As" instead of "Reference ID" for Temporary Citation.

Now, when you click "Edit | Temporary Citation", the text in the "File As" field will be used to identify the record. Since Reference ID will change if you move the same record from one database to another, if you plan to use more than one database, we recommend you using natural citation instead of Reference ID.

Note: There are several ways to add temporary citations to your word processor. Within Biblioscape, you can press Ctrl+T or Ctrl+C to copy the temporary citation into the Clipboard, then paste it into your word processor document. Or, you can use BiblioSidekick to drag a reference from BiblioSidekick to your word processor document; the correct temporary citation will be automatically inserted.

### [Group multiple citations together](#)

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"multiple citation" refers to a citation that includes more than one reference.

Single citation: (Smith, 1992)

Multiple citation: (Smith, 1992; Bowen, 1997; Ishaq, 1989)

### How to Create a Multiple Citation

1. Select the references that you want to cite by holding down the Shift or Ctrl key while clicking on the desired references.
2. Go to menu "Edit | Copy Citation Tag" or "Edit | Shoot Citation Tag".
3. Switch to your word processor, and go to "Edit | Paste" (Ctrl+V).

The temporary citations will appear together inside one bracket in the order they appear in the database. For example:

[Smith, K. 1992 #23 / Bowen, P. J. 1997 #298 / Ishaq, K. 1989 #95].

Multiple citations must be separated by " / " for Biblioscape to format them correctly. After being formatted by Biblioscape, the above temporary citation may look like (2, 8, 12) or (Smith, 1992; Bowen, 1997; Ishaq, 1989) depending on the style used for formatting.

### [Include multiple references under one citation](#)

---

Certain journals, like the Journal of Organic Chemistry, allow authors to include more than one reference under a single citation. For example:

(3) (a) Wheland, G. W.; Pauling, L. J. *Am. Chem. Soc.* 1935, 57, 2086-2095. (b) Lert, P. W.; Trindle, C. J. *Am. Chem. Soc.* 1971, 93, 6392-6395. (c) Thiemann, T.; Li, Y.-Q.; Mataka, S.; Tashiro, M. *J. Chem. Res.* 1995, 2364-2379.

(4) Mock, W. L. *J. Am. Chem. Soc.* 1970, 92, 7610-7612.

#### How to Create a Single Citation with Multiple References

To cite multiple references under a single citation, you follow the same steps as described above for grouping multiple citations together. After the temporary citations are inserted into the document, you need to change the separator from " / " into " | ". For example:

[Wheland, G. W. 1935 #84 | Lert, P. W. 1971 #832 | Thiemann, T. 1995 #283]

### 6.1.2.5 Temporary citations examples

#### [Suppress author or year in a formatted citation](#)

There may be times you may want to omit the author or the year in the final formatted citation. For example, you may have already mentioned the author's name in the sentence and need only the year in the final citation. In such case, you can add "^na" anywhere between open bracket "[" and pound sign "#" in the temporary citation. For example:

- \* Before format: ...the theory proposed by Smith [Smith, K. 1992 ^na #23] is used to ...
- \* After format: ...the theory proposed by Smith (1992) is used to ...

Similarly, you can suppress year by using "^ny". For example:

- \* Before format: ...as published in 1992 [Smith, K. 1992 ^ny #23] by another team ...
- \* After format: ...as published in 1992 (Smith) by another team ...

Note: There are two menu commands "Shoot Temp Suppress Author" and "Shoot Temp Suppress Year" that will add ^na or ^ny automatically when you shoot temporary citations. But, these two menu commands are not shown by default. You can add them to the menu system by go to "Tools | Customize". On the "Commands" tab, go to the "Edit" category. You can then drag and drop any commands to the menu system.

#### [Suppress parenthesis in a formatted citation](#)

There are occasions in which it would be useful not to have the citation surrounded by parentheses. For example, APA style requires citations below diagrams or tables to be listed as:

"Source: Smith and Bowen, 2004". In other places, the same citation should be shown as: "(Smith and Bowen, 2004)". Bibloscope allows you to use ^np inside temporary citations to indicate no parenthesis should be added around the formatted citation. You can add "^np" anywhere between open bracket "[" and pound sign "#" in the temporary citation. For example:

- Before format: Sources: [Smith, K. 1992 ^np #23]
- After format: Source: Smith, 1992

Here is another example:

- Before format: More recent work on employed lawyers (corporate counsel; [^np Gunz, 2002 #12340]) found evidence suggesting...
- After format: More recent work on employed lawyers (corporate counsel; Gunz and Gunz, 2002) found evidence suggesting...

#### Add prefix and suffix to a formatted citation

Text can be included in the temporary citation, so after formatting, it can be added at the beginning or the end of the final citation. This text is not used to match the temporary citation to a record in the database. Only text between the pound sign "#" and the end bracket "]" is used to identify a record. The prefix text should be added inside parentheses immediately after the open bracket. If the left parenthesis is not added immediately after the open bracket "[", it will be interpreted as suffix text. The following example shows how to include prefix and suffix text to be included in the final citation.

Temporary citation: [(see also ) Smith, K. 1992 #23]

Final citation: (See also Smith, 1992)

Temporary citation: [Smith, K. 1992 (, pp. 45-47) #23]

Final citation: (Smith, 1992, pp. 45-47)

In multiple citations, the prefix and suffix text will always remain with the citation they follow. The prefix and suffix text can be used in natural citation as well. For example:

Temporary citation: [(see also ) #smith 1992 synthesis nucleoside]

Final citation: (See also Smith, 1992)

## Cited pages

For styles that use the author-date system, including cited pages inside parenthesis as shown above should be enough to handle the necessities. For styles that generate citations in footnotes, cited pages have to be added differently. Some output styles for footnotes require you to include cited pages for cited books. These styles are mostly used in the fields of humanity and art. Many cited citations are from different sections of the same book, so adding cited pages is mandatory in such cases. The Biblioscape style editor supports cited pages. You can enter the cited pages in temporary citations in the form: [Sood, A. 1989 @45-47 #23]. During formatting, Biblioscape will extract the page numbers after the @ sign. The extracted page numbers will be treated as other items in an output styles. That means you can add text before and after it, you can pick the font style to apply, and you can choose how the start page and end page should be formatted. If Biblioscape finds cited pages in a temporary citation, it will format it according to the specification in the output style used. If there is no cited pages entry in the style you used, cited pages data found in the temporary citation will be ignored. So, in order to use cited pages, you have to be sure that the cited pages entry is included in the style you chose.

## Example of temporary citations

The following examples will show you how different modifications to a temporary citation will affect its formatted citation.

	Temporary Citation	Author/Year Style	Numbered Style
Author, Year With reference ID	[Smith, K. 1992 #23]	(Smith, 1992)	(1)
Author, Year With natural citation	[#smith 1992 boronic acid]	(Smith, 1992)	(1)
Author, Year With reference ID and comment	[an interesting paper #23]	(Smith, 1992)	(1)
Author, Year, Prefix With reference ID	[(See also ) #Smith, K. #23]	(See also Smith, 1992)	(See also 1)
Author, Year, Suffix With search text	[ ( p. 44) #smith 1992 roman]	(Smith, 1992 p. 44)	(1 p. 44)
Suppress Year With reference ID	[^ny #23]	(Smith)	(1)
Suppress Author With reference ID	[^na Smith, K. 1992 #23]	(1992)	(1)
Author, Suppress Year, Suffix With reference ID	[^ny Smith 1992 (, p. 44) #23]	(Smith, p. 44)	(1, p44)
Prefix, Suppress Author, Year With search text	[(See also ) ^na Smith #23]	(See also 1992)	(See also 1)

### 6.1.3 From formatted document back to temporary citations

You can convert a Bibloscape formatted document back to a document with temporary citations. Click menu command "Tools | Unformat Manuscript", select the document to unformat and click the "Start" button.

After a paper is formatted by Bibloscape, you can edit it any way you want; this may even include adding new temporary citations. In order to incorporate the new temporary citations into the bibliography, you need to format the document again. You don't have to unformat the document first and then format it again to generate the final draft.

#### Non-English characters in first author's name

If there are non-English characters in the first author's name, after unformatting, those characters may disappear. For example, if the original temporary citation is [Hämäläinen, 1991 #26], after formatting with an author-date style, the formatted citation may look like: (Hämäläinen et al., 1991). When unformatted, the temporary citation will become [Hmlinen, 1991 #26]. To get around this problem, you can go to "Tools | Options" in Bibloscape. On the "Format Manuscript" tab, check the box "Format double byte languages". Now, while unformatting a document, Bibloscape will generate the author year in the temporary citation directly from the record in the database instead of from the formatted document.

Note: Bibloscape can format and unformat document saved in RTF or HTML format.

### 6.1.4 Integration with word processors

Bibloscape can format documents saved in RTF or HTML format, so any word processor that support RTF or HTML can work with Bibloscape. Just insert temporary citations as needed and save documents in RTF format once finished writing. In Bibloscape, go to "Tools | Format Manuscript" to format the document and pick the desired style. For Microsoft Word and Corel WordPerfect users, Bibloscape provides better integration by allowing users to access Bibloscape commands from your word processor.

#### Integrate Bibloscape with Microsoft Word

You can add Bibloscape related menus into Microsoft Word. There are two ways to achieve such an integration. You only need to do one of the following two options:

- In Microsoft Word, go to menu command "Tools | Templates and Add-Ins". Under the section "Global templates and add-ins", click the "Add" button. Go to the folder "... \Bibloscape 5\Tools\" and pick the file "Bib\_word.dot" (Choose "Bib\_word\_9.dot" if you use Word 2000 or later versions).

- Copy the Biblioscape Word template file "...\Biblioscape x\Tools\Bib\_word.dot" to the Microsoft Word "startup" directory. Next time you start Word, the template file will be loaded automatically. A new menu group as well as a toolbar related to Biblioscape will be added to Microsoft Word.

Note: Biblioscape adds hidden text during formatting. The hidden text will not show in the printed document. You also have the option to not display it in Microsoft Word. Go to the Word menu command "Tools | Options" to bring up the option window. Activate tab "View" and uncheck the item "Hidden text".

Tip: To insert the reference tag into a word processor, you can lay BiblioSidekick next to your word processor, hold down the Alt key, and drag-and-drop references into your word processor.

### [Integrate Biblioscape with Corel WordPerfect](#)

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Several WordPerfect macros are installed under the "...\Biblioscape 5\Tools\" folder. To run these macros, please go to menu command "Tools | Macros | Play..." in WordPerfect. Go to the "Tools" sub-folder under Biblioscape installation and run the macros.

- wpb\_format\_document\_rtf.wcm: Convert a document with temporary citations to formatted citations and a bibliography.
- wpb\_unformat\_document\_rtf.wcm: Convert formatted citations and a bibliography back to temporary citations. This step is required if you have added more temporary citations after formatting the document with Biblioscape.
- wpb\_search\_for\_reference.wcm: Prompts users to enter a search string to query the Biblioscape database. If only one record is found, the temporary citation of that record will be inserted at the cursor position. If more than one hit is found, all hits will be listed in Biblioscape.
- wpb\_convert\_greek.wcm: All English words of Greek letters will be converted to Greek letters. For example, "alpha" will be converted to "α".

You can add often used macros to WordPerfect toolbars. First, move the cursor on top of the toolbar and click the right mouse button. Select "Edit" menu. Go to the "Macros" tab on the Toolbar Editor. Click the "Add Macro..." button. Select the macro you want to add. You will be prompted with "Save macro with full path?", click the "No" button. The selected macro will be added to the end of the toolbar. You can change its position on the toolbar by using drag-and-drop.

Note: Biblioscape adds hidden text during formatting. The hidden text will not show in the printed document. You also have the option of not displaying it in WordPerfect. Go to menu command

“View | Hidden Text” to uncheck it.

Tip: To insert the reference tag into a word processor, you can lay BiblioSidekick next to your word processor, hold down the Alt key, and drag-and-drop references into your word processor.

### 6.1.5 Using Bibloscape with LaTeX editors

LaTeX is not a word processor. It is a markup language just like HTML, RTF, etc. Most people don't know LaTeX. But, if you have gone to graduate school, you must have heard of it. If you majored in math or physics, you must have used it. In the following sections, I will give a brief introduction about LaTeX and discuss issues related to Bibloscape. If you have not heard of LaTeX and want to know more, please visit <http://en.wikibooks.org/wiki/LaTeX>.

The basic idea in LaTeX is to separate content from presentation. Sound familiar? This is what people want to do with XML. In a LaTeX file, you write like this:

```
\documentclass{article}
\title{My first article in class}
\begin{document}
Hello World!
\end{document}
```

When the file is sent to the publisher, it will be converted by macro packages to other formats like DVI, PostScript, and PDF, and be ready for printing. The font properties and layout of the article will be decided according to your publisher's specifications. You only need to worry about the content. If you are interested in experimenting with LaTeX, there are many well established LaTeX editors. Many of them are free. For example, you can download a good LaTeX editor at <http://www.latexeditor.org>.

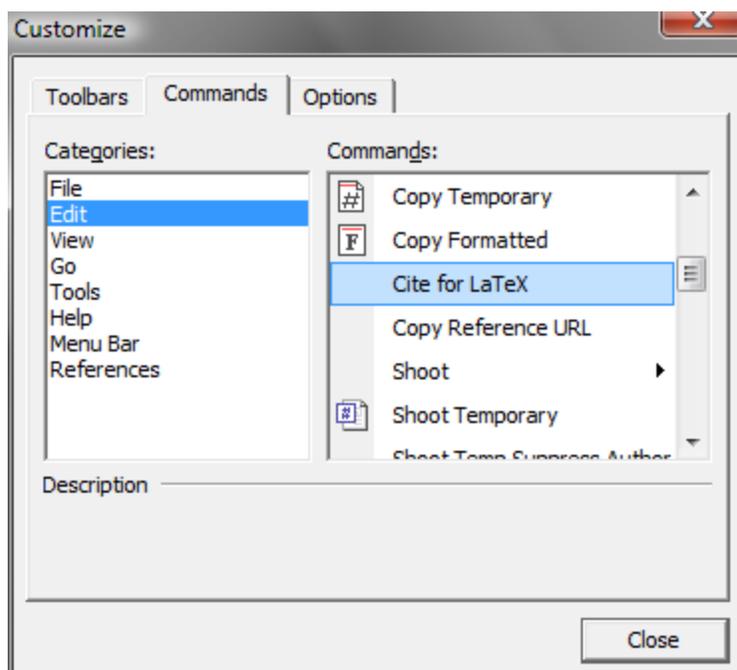
Citation and bibliography support is an important part of LaTeX. A research paper or book cannot live without citing references. If you write with a LaTeX editor, you should put all your cited references in a separate BibTeX file. When you are ready to cite a reference in your LaTeX document, write "`\cite{refKey}`". The refKey is a string made of author and year, so the LaTeX processor can know which reference you are trying to cite in the BibTeX file. When you are done writing, the LaTeX engine will generate formatted citations and a bibliography according to the style you used.

#### [What are left for Bibloscape to do](#)

If you want to use Bibloscape to manage your reference collection and write in a LaTeX editor, there are two things Bibloscape needs to do well.

### Generate temporary citation for LaTeX

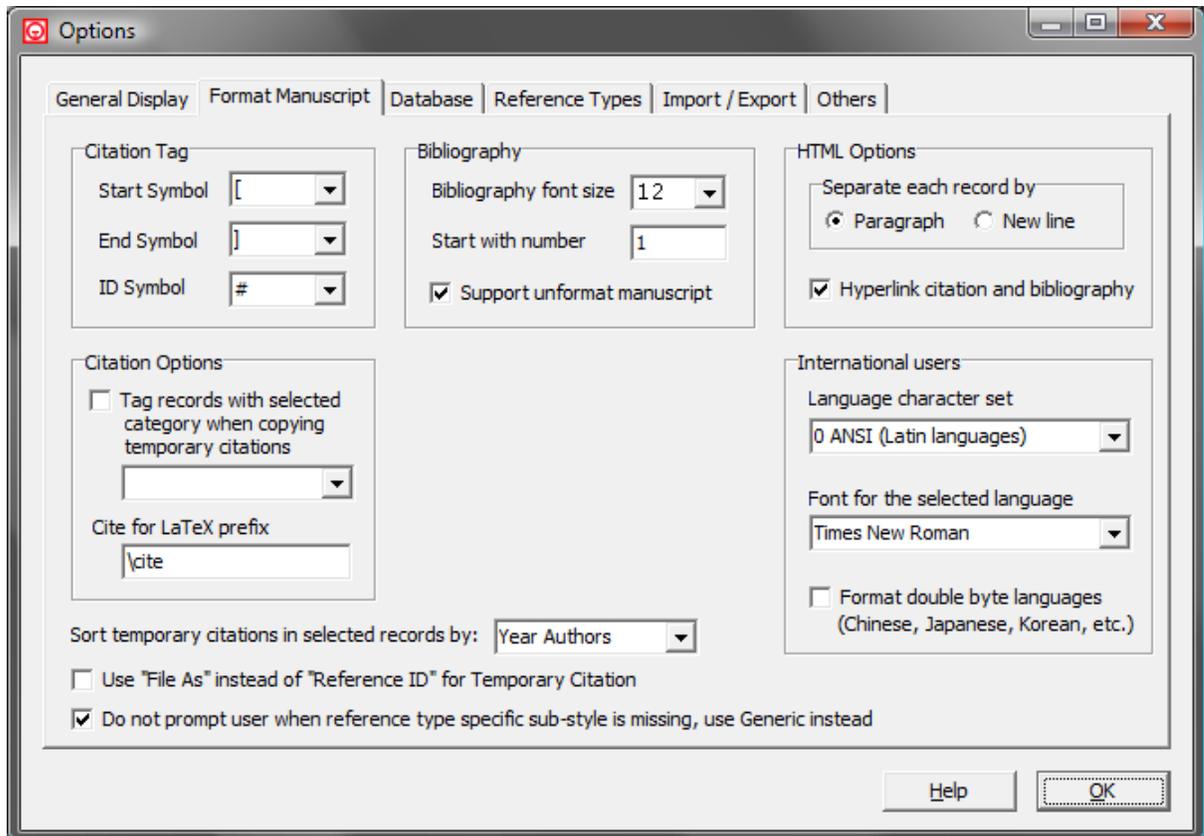
Bibloscape already has a menu command to create a temporary citation for using in a LaTeX editor. Since there are not many Bibloscape users who need this command, it is not made available in the default menu system. To bring it out, you have to go to menu command "Tools | Customize..." to bring out the "Customize" window. Select the "Commands" tab and go to "Edit" in the "Categories:" list. Under the "Commands:" list on the right, find the command "Cite for LaTeX" and drag and drop it under the Bibloscape menu "Edit". To use this command, select the reference (s) you want to cite and click "Edit | Cite for LaTeX". Go to your LaTeX editor, put the cursor at the place you want to cite, and press Ctrl+V to paste text. The temporary citation will be pasted. For example, if the first author's last name of your reference is Giot and the publication year is 2003, the temporary citation will look like: "`\cite{GIOT:2003:ID284}`". The number 284 after ":ID" is the Reference ID. If you do not want "`\cite`" to be included, you can go to the "Tools | Options" window. On the "Format Manuscript" tab, remove "`\cite`" in the box "Cite for LaTeX prefix".



### Export references in BibTeX format

When you cite for a paper in LaTeX, you have to prepare a BibTeX file that includes all the references cited in that paper. Exporting references as a BibTeX file is easy, but selecting the needed references to export could be a tedious job. Bibloscape solves this problem by letting you automatically tag a reference when it is cited in a LaTeX word processor. First, go to the Categories module and create a new category for the paper you are writing. For example, let's call it "my latex paper". Second, go to menu command "Tools | Options" window in Bibloscape. On the "Format Manuscript" tab, there is a section called "Citation Options". Under this section, select the checkbox "Tag records with selected category when copying temporary citations". Then, select the

category "my latex paper" you just created. Now when you use the command "Cite for LaTeX", the category "my latex paper" will be automatically added to the reference selected. Once you have finished writing, go to the tab "Categories" on the tabs pane in the References module. Select the category "my latex paper", click the right mouse button, and select "Search". All the references cited for that paper will be retrieved. You can then go to menu command 'File | Export' and export these references as BibTeX file. You can then include this file with your LaTeX file for final processing using a LaTeX engine.



## 6.2 About output style

BibScope can format your manuscript to generate in-text citations and an end-of-document bibliography based on the output style you select. These styles will automatically do the font changes, use the correct name format, sequence numbers, etc. so you don't have to do these changes yourself one by one. BibScope provides a large number of commonly used styles during installation. With a built-in style editor, you can create new styles if necessary. If you have difficulty creating a new output style, please contact [support@bibscope.com](mailto:support@bibscope.com) for help.

### [Style manual](#)

A style manual is a set of guidelines about how to format footnotes and bibliographies for a paper,

or how to edit a paper or manuscript. Style manuals can be general in scope or dedicated to a particular subject area. When you write a term paper, a thesis, or a scholarly article for publication, it is incumbent upon you to use the citation style appropriate for your audience - teacher or publisher. Below you will find a list of commonly used style manuals.

- APA (American Psychological Association) Publication Manual of the American Psychological Association 5th Ed.
- Chicago (University of Chicago) Chicago Manual of Style, 15th ed.
- Turabian (University of Chicago) A Manual for Writers, 6th ed.
- MLA (Modern Language Association) MLA Handbook for Writers of Research Papers, 6th ed.
- ACS (American Chemical Society) The ACS Style Guide, 2nd ed.
- CBE (Council of Biology Editors) Scientific Style and Format, 6th ed.

### [Bibioscape styles](#)

---

Bibioscape uses format filters called "output styles" to implement a style manual's specification regarding citations and the bibliography. Bibioscape comes with output styles for all major style manuals, as well as 1,000 plus styles for major research journals. The Bibioscape style editor allows users to edit or add new output styles, so you are not limited by the output styles provided with Bibioscape. Bibliographic styles are rules for the preparation of a manuscript. For bibliographic software like Bibioscape, it only concerns one aspect of bibliographic style, which is how to format in-text citations and bibliographies.

#### **In-text citation vs. footnote**

There are two ways to cite a reference: using notes including footnotes or endnotes, or using in-text citations like author-date or numbers. The notes style is preferred by researchers in the fields of arts and humanities. The format used for in-text citations varies widely. The two most popular forms are the author-date system and the number system. Bibioscape can handle both cases well. In the case of in-text citations, you insert Bibioscape temporary citations to the main text as you write. Once formatted, the temporary citations will be turned into author-date or numbers depending on which style is used. You can use a word processor to create an footnote or endnote. Then, insert a Bibioscape temporary citation to the newly created footnote or endnote. Once formatted, the temporary citations will be converted into formatted footnotes or endnotes. A bibliography list will be generated at the end of document as well.

#### 1. In-text citation

**Author-date:** Use "Author-Year" for in-text citations and sort references in the bibliography alphabetically by author name. For example:

Before formatting:

Temporary Citations: ...Boronic acid analogs have been synthesized as transition state analogs for acyl transfer reactions, and inhibitors of dihydroorotase [Kinder 1990 #49].

After formatting:

In-Text Citation: ...Boronic acid analogs have been synthesized as transition state analogs for acyl transfer reactions, and inhibitors of dihydroorotase (Kinder 1990).

Reference List: Kinder, D. H.; Frank, S. F.; Ames, M. M. Analogues of Carbamyl Aspartate as Inhibitors of Dihydroorotases: Preparation of Boronic Acid Transition State Analogues and a Zinc Chelator. *J. Med. Chem.* 1990, 33, 819-823

**Number:** Use number for in-text citations, and sort references in the bibliography by order of appearance. For example:

Before formatting:

Temporary Citations: ...Boronic acid analogs have been synthesized as transition state analogs for acyl transfer reactions, and inhibitors of dihydroorotase [Kinder 1990 #49].

After formatting:

In-Text Citation: ...Boronic acid analogs have been synthesized as transition state analogs for acyl transfer reactions, and inhibitors of dihydroorotase (1).

Reference List: (1) Kinder, D. H.; Frank, S. F.; Ames, M. M. Analogues of Carbamyl Aspartate as Inhibitors of Dihydroorotases: Preparation of Boronic Acid Transition State Analogues and a Zinc Chelator. *J. Med. Chem.* 1990, 33, 819-823

## 2. Footnote or endnote

The footnote style displays a number in the main text; the detailed information of the cited reference is displayed at the bottom of the same page. For the endnote style, the detailed information of the cited reference is shown at the end of the document. Footnotes and endnotes are handled by your word processor. You only need to insert Bibloscope temporary citations into the footnote or endnote. All Bibloscope styles that support footnotes or endnotes start with "\*". For example: \*MLA (notes)

Before formatting:

Main text: ...Boronic acid analogs have been synthesized as transition state analogs for acyl transfer reactions, and inhibitors of dihydroorotase<sup>1</sup>.

Footnote: <sup>1</sup> [Yamamoto 1990 #49]

After formatting:

Main text: ...Boronic acid analogs have been synthesized as transition state analogs for acyl transfer reactions, and inhibitors of dihydroorotase<sup>1</sup>.

Footnote: <sup>1</sup> Y. Yamamoto, T. Seko, F. Rong and H. Nemoto, "Boron-10 Carriers for NCT. A New Synthetic Method Via Condensation with Aldehydes having boronic Moiety," Tetrahedron Lett. 30. 51 (1990).

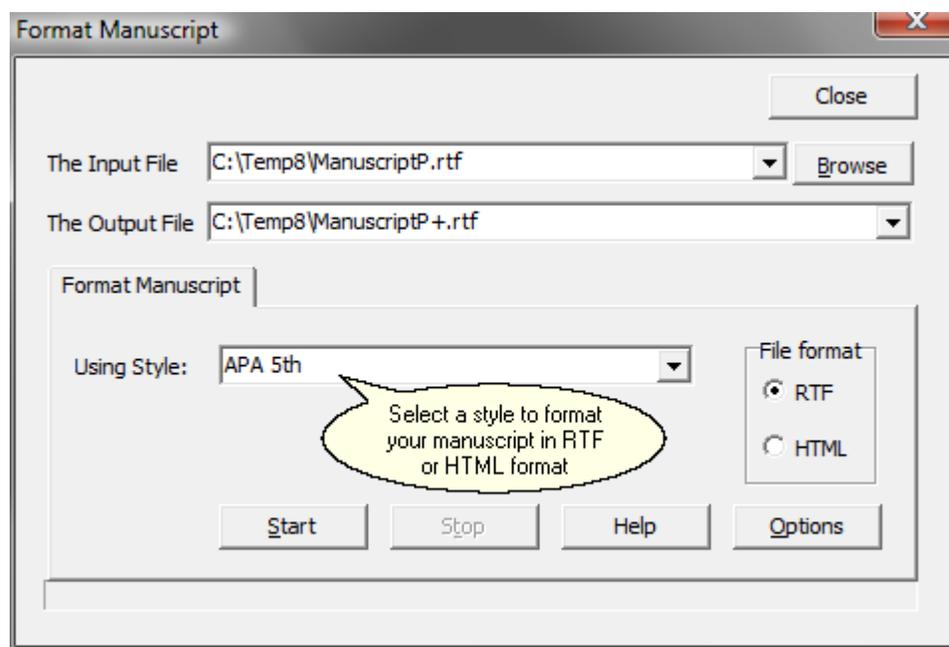
Bibliography: Yamamoto, Y., et al. . "Boron-10 Carriers for Nct. A New Synthetic Method Via Condensation With Aldehydes Having Boronic Moiety." Tetrahedron Lett. 30. 51 (1990): 7191-7194.

### Bibliography

When references are cited as in-text citations, a reference list is generated at the end of the document. When references are cited as footnotes or endnotes, a bibliography list is generated as well at the end of document. How references are formatted in the list is determined by the settings in the "Reference List / Bibliography" tab of the style editor.

### How a style is used

The most import use of Bibioscape styles is to format a manuscript to convert temporary citations into formatted citations and generate a bibliography. Besides this, a style can be used for a few other things.

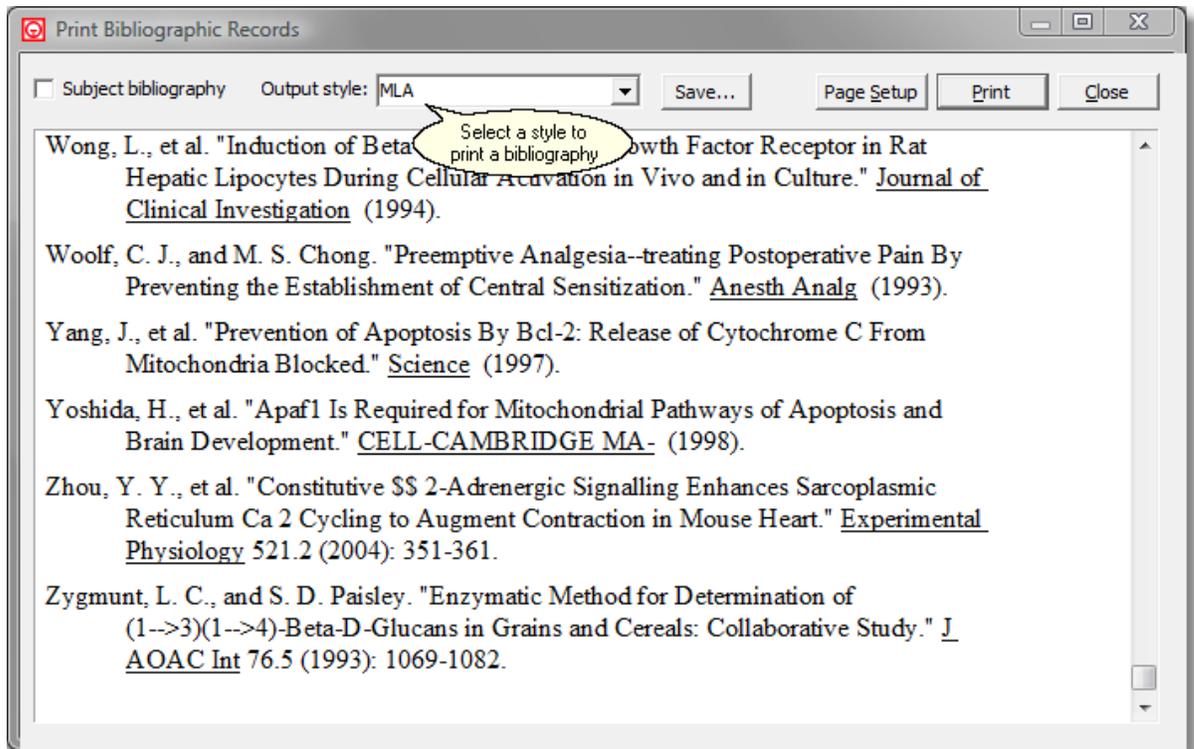


Bibioscape uses the selected style on the toolbar to format a reference when you use the

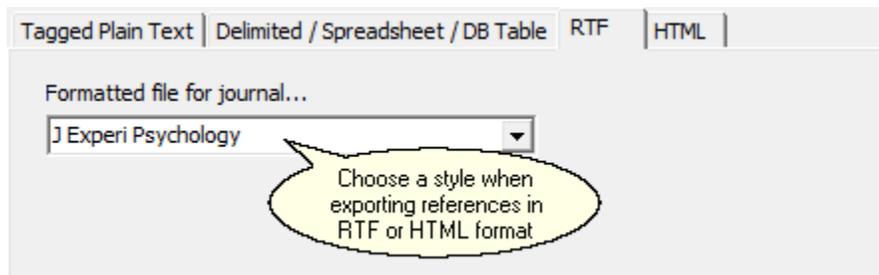
command "Edit | Copy Formatted". The selected style also determines how a reference is formatted in the "Formatted" tab of the preview panel.



When you use the menu command "File | Print Bibliography", the selected style on the toolbar will be used as the default to generate a bibliography of selected references. You can pick another style using the combo box if needed.



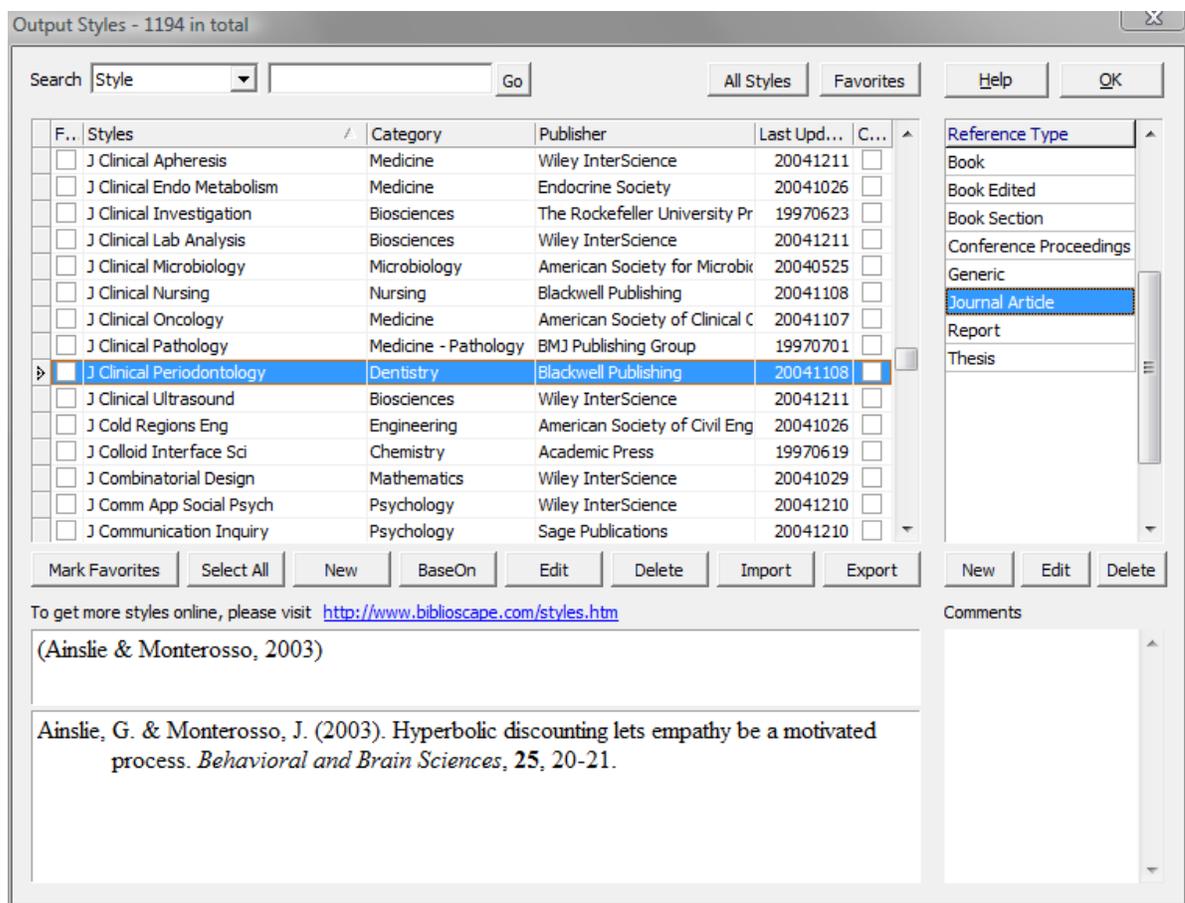
When you export references in RTF format, you can choose a style to format the included references. You can also choose a style and export selected references as a HTML file. You can create a custom style to export references for special needs.



## 6.2.1 Manage output styles

Bibloscape output styles are used to generate citations and a bibliography for journal articles, books, and theses. They contain the formatting rules for each data field of the bibliography records

cited in your writing. Biblioscape uses output styles to convert documents with temporary citations to formatted documents. In Biblioscape, bibliographic styles are organized into a table. You can browse or search output styles easily.



Output styles are usually named after a journal. Each output style has several sub-filters associated with each different reference type. For example, a "Journal Article" record is formatted differently from a "Book Section" record. To view general information about an output style:

1. Click on the menu command "Tools | Styles | Output Styles".
2. Click on the "Edit" button.

If you can't find the output style for a specific journal, you can create a new one. You can export the styles you create and share them with other Biblioscape users at the Biblioscape user forum.

### Search styles

To search for output styles, select the field to search for using the combo box. Enter the search text in the edit box and press the Enter key. All relevant styles will be listed. To display all styles, click on the "All Styles" button. You can also mark some styles as favorites. First, select the styles you want to mark, then click on the "Mark Favorites" button. To display your favorites styles, click on the "Favorites" button at the top.

### Sort or group styles

To sort styles, just click on the column header. Clicking again will sort in reverse order. To group styles, drag the column header to the grouping panel.

### Import styles

1. Download the style file (\*.bff) from the Web and save it under a folder.
2. Click the "Import" button on the Biblioscape output styles window.
3. Select the output style file you downloaded from the Web in step 1.
4. Click on the "Open" button in the file import window.

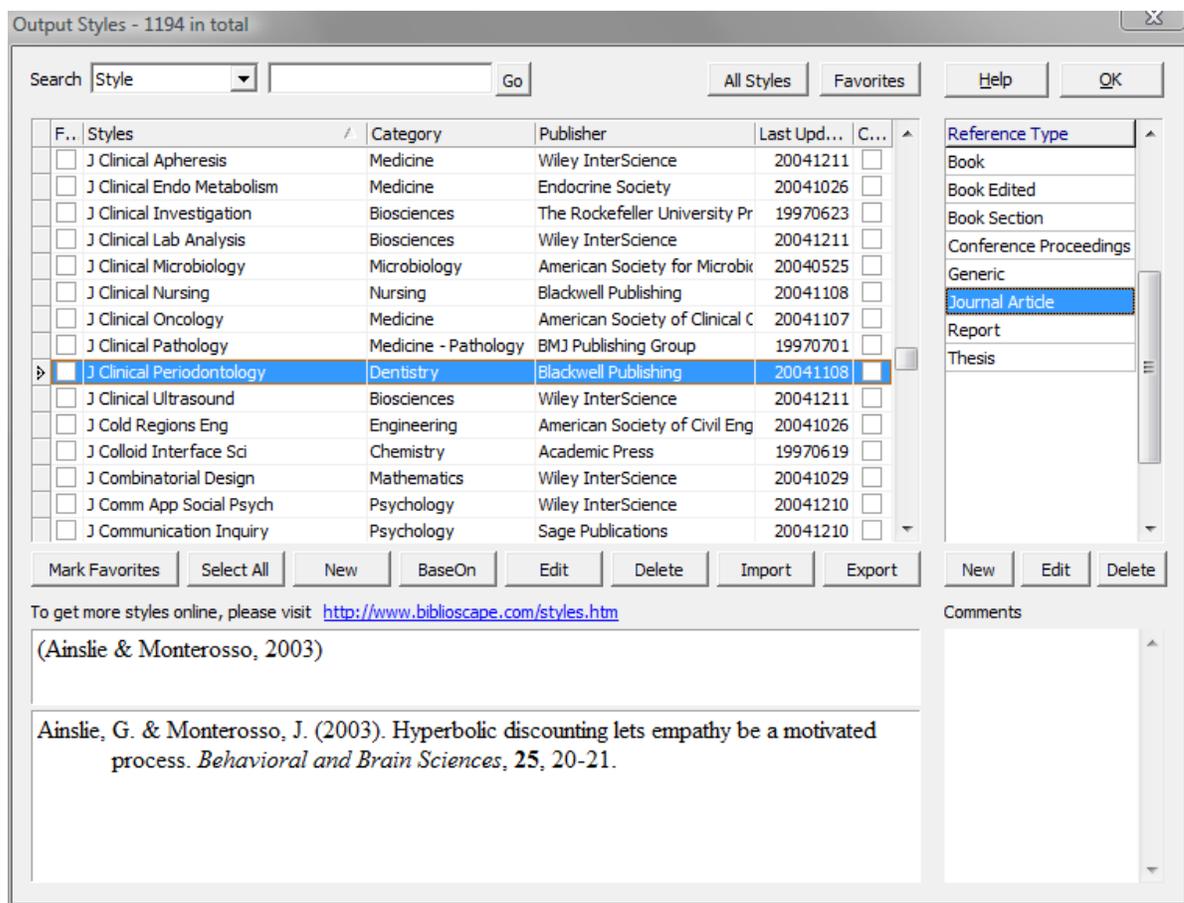
### Export styles

1. Select the style(s) (hold down "Ctrl" key to select more than one) that you want to export.
2. Click on the "Export" button.
3. Select a directory to export to, and type a file name.
4. Click on the "Save" button.

Tip: You can upload styles you create for a journal to the Biblioscape web site. As more styles are deposited at [www.biblioscape.com](http://www.biblioscape.com), it will become a valuable resource, free to research scientists. To upload your style, first export it as a .bff file (you can hold down the "Ctrl" key to select more than one). Email [support@biblioscape.com](mailto:support@biblioscape.com) and send the style file (.bff) as an attachment.

## 6.2.2 Create a style

Biblioscape comes with 1,000 plus pre-made styles. You can play with existing styles to get familiar with how some of the settings work. In the references module, go to the menu command "Tools | Styles | Output Styles" to bring out the style editor.



### Create a new style

1. Click on the "New" button under the style table on the left.
2. Type in the relevant information about the new style. If the style is to be used for a footnote system, check the box "Insert temporary citations inside endnote or footnote". It is recommended to give a short style name. You can put the journal's full name in the "Journal" field. If you have a comment or any other type of information about the style, put it in the "Comments" field. If the style will be used frequently, check the box "Favorite". Enter the "Last Update" as an integer with the year first, followed by month and day. If you have the URL of the journal's home page, enter it in the "Contact" field plus other contact info if needed.

J Clinical Oncology

Help Cancel OK

Cite in Note  Insert temporary citations inside endnote or footnote

Style J Clinical Oncology

Based On

Journal Journal of Clinical Oncology

Category Medicine

Comments

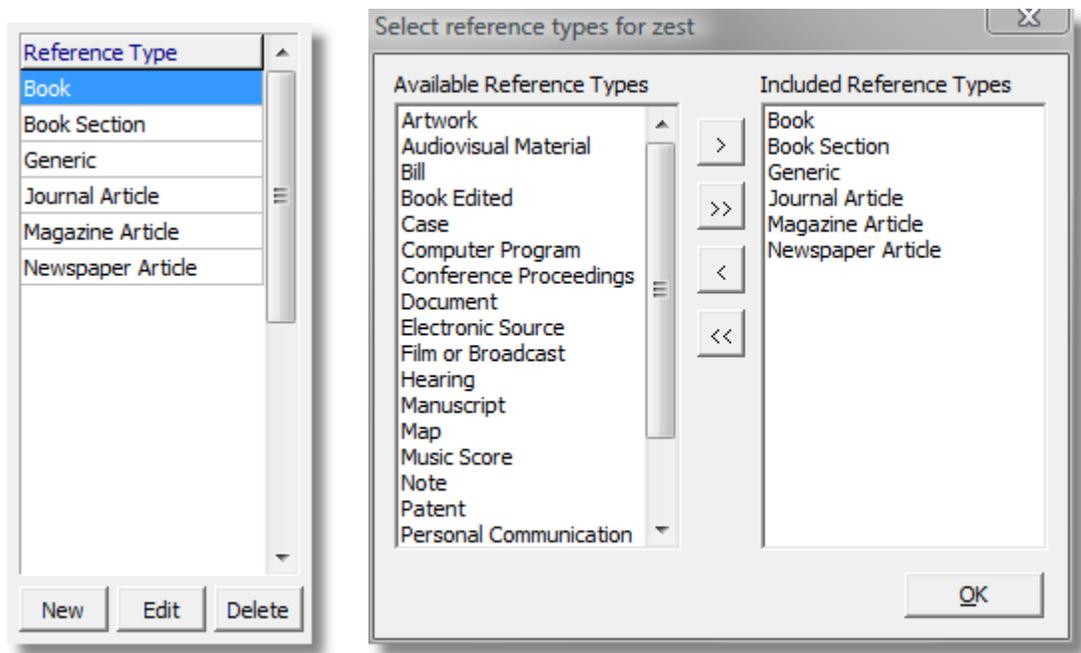
Favorite Last Update 20041107

Publisher American Society of Clinical Oncology

Contact <http://www.jco.org/>

Call Number

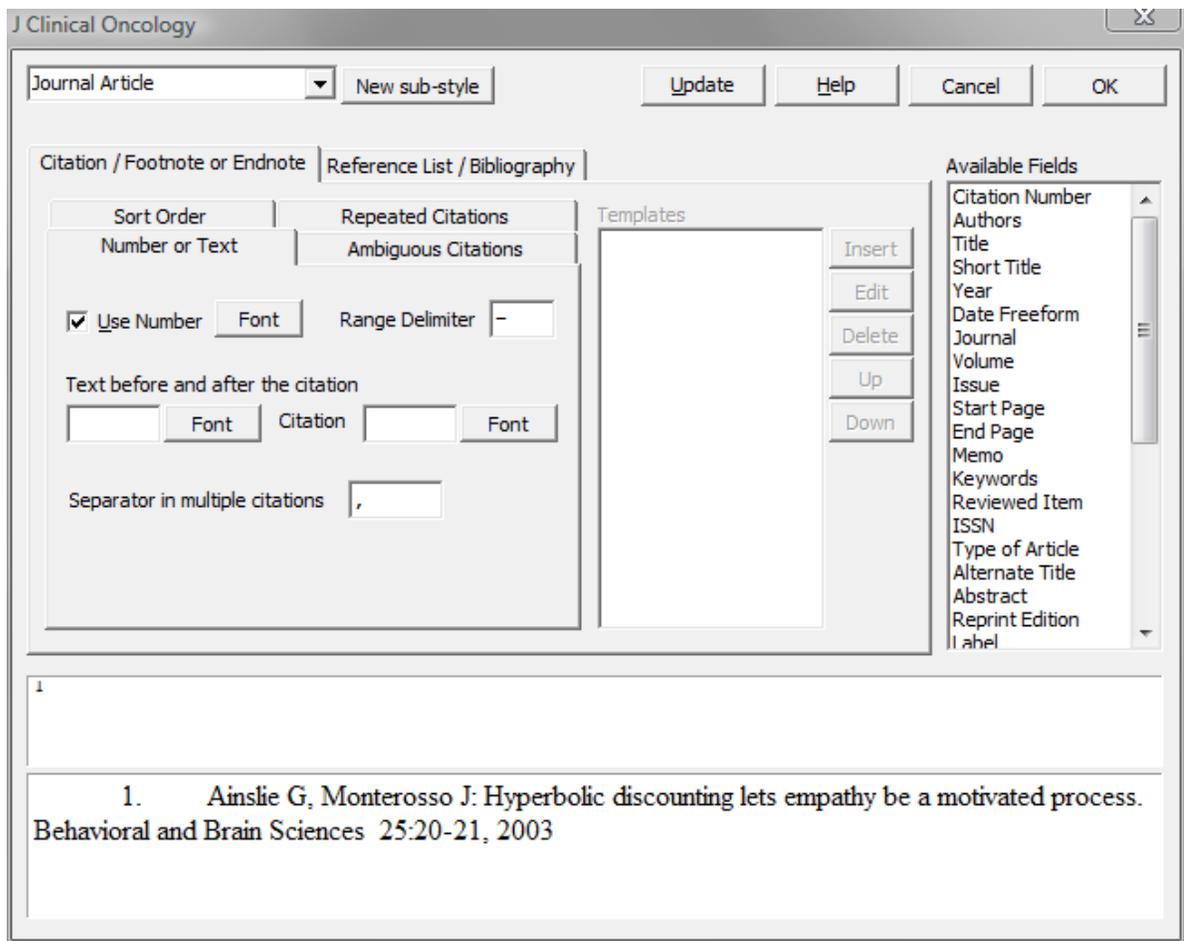
3. Click on the "OK" button to save the changes.
4. Click on the "New" button under table "Reference Type" on the right. A new window will be shown. All the available reference types are displayed on the left. If the sub-style for a reference type has already been added, it will be displayed on the right. To add a new sub-style for a certain reference type, drag it from the left panel and drop it to the right panel. Or, you can do the following.



5. Select the available reference types on the left.
6. Click the arrow button to add the selected reference types (or you can just drag and drop).
7. Click on the "OK" button.

#### Define reference type specific sub-style

Double click a reference type specific sub-style to open the editor. There are two tabs: "Citation / Footnote or Endnote", and "Reference List / Bibliography". For styles that use in-text citation, the tab "Citation / Footnote or Endnote" controls how the citation number or author-date should be formatted. For styles that use footnotes, the tab "Citation / Footnote or Endnote" controls what fields to be included in the footnote and how they are formatted.



### Citation / Footnote or Endnote

All the parameters for the formatting of citations as well as footnotes or endnotes are on the "Citation / Footnote or Endnote" tab. After being formatted by Bibloscape, temporary citations in your document will be replaced by text specified in this tab. In the two boxes around the label "Citation", you can add static text in a customized font. In the box "Citation Separator", enter a symbol such as "; " to separate citations when more than one reference is cited together. For example: (Smith, K. 1997; Bowen, P., 1996). You can view the result of the changes you made in the "Citation Box" at the bottom of the window after clicking on the "Update" button.

### Defining a style when citation uses number

1. If citations use numbers, keep the checkbox "Use Number" checked.
2. You can change the font properties of the citation number by clicking on the "Font" button next to it.
3. If there are more than two citations in sequential order like 4, 5, 6, 7, you can show them in range form.

4. Provide the range symbol in the box "Range Delimiter". For example, "-" will make the above example look like "4-7".

#### **Defining a style when citation uses text**

1. When a citation uses text such as "Author + Year", keep the checkbox "Use Number" unchecked.
2. You can add more data fields to the "Citation Sequence" by dragging and dropping it from list box "Available Fields", or by clicking on the "Insert" button.
3. To delete a data field in the "Citation Sequence", click on the "Delete" button.
4. To rearrange the order of data fields in the "Citation Sequence", you can use drag-and-drop, or by click on the "Up" button and "Down" button.
5. To edit the formatting information for each data field, double click the field name or click on the "Edit" button.

#### **Defining a style that uses footnote or endnote**

1. When citing references such as footnotes or endnotes, keep the checkbox "Use Number" unchecked.
2. You can add more data fields to "Templates" by dragging and dropping it from the list box "Available Fields", or by clicking on the "Insert" button.
3. When citing as footnotes or endnotes, "Cited Pages" is sometimes used instead of the regularly used "Start Page" and "End Page". Some footnote or endnote styles require specifying the exact page ranges in the footnotes or endnotes. More information about "Cited Pages" will be discussed in the following section.

#### **Reference List / Bibliography**

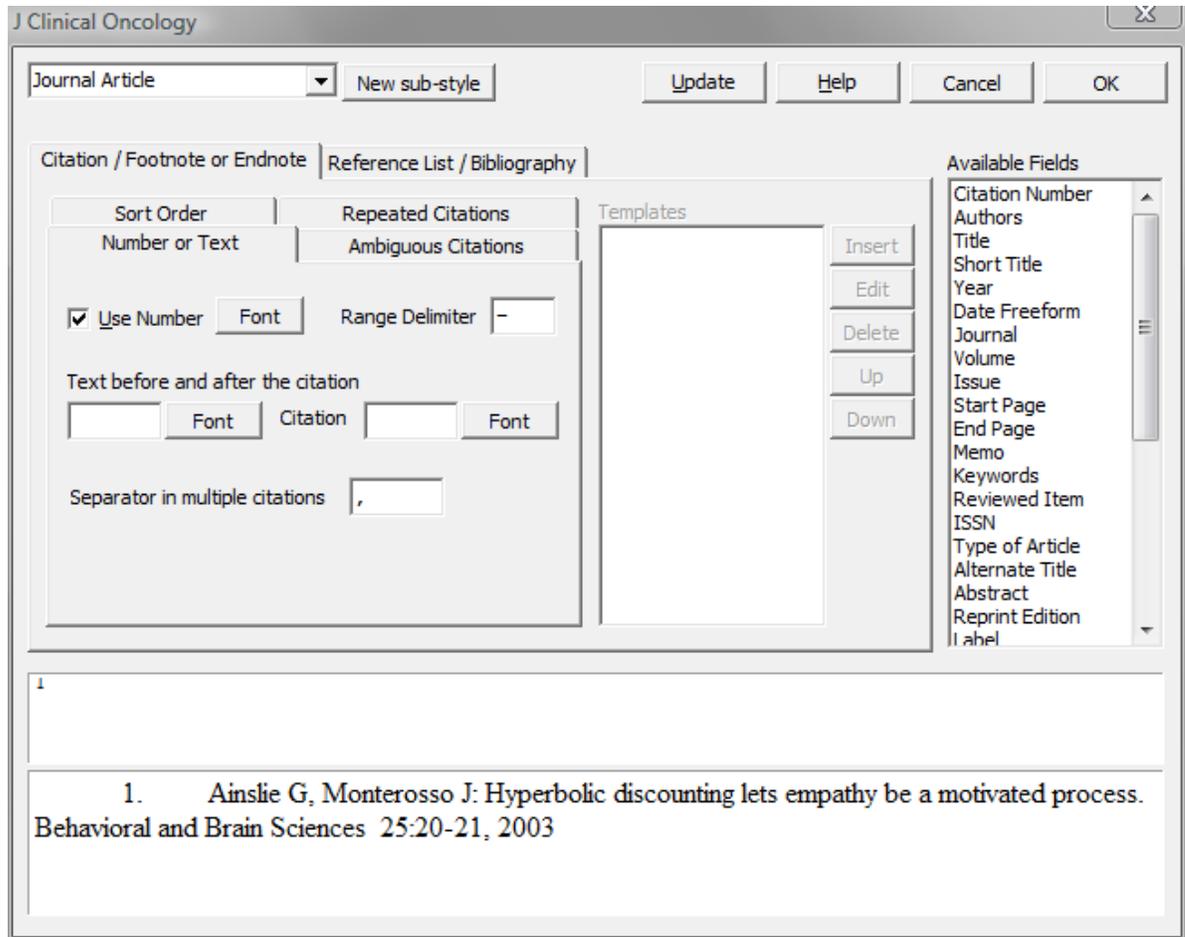
This group panel provides the means to format a bibliography according to your wishes.

References in the bibliography section can be sorted in alphabetical order of text, or by citation appearance order. Usually, when citation uses text such as "Author + Year", the bibliography is sorted in alphabetical order by the first author. If the citation uses numbers, the bibliography is sorted in citation appearance order. As with citation templates, data fields can be added to bibliography templates by dragging and dropping from "Available Fields", or by using the "Insert" button. Before clicking on the "Insert" button, you have to select the data field to insert from "Available Fields", and the place to insert in "Templates". To delete data field(s) in bibliography templates, select it first, then click on the "Delete" button. The order of data fields in the bibliography templates box can be rearranged by dragging and dropping, or by using the "Up" and

"Down" buttons. To view the results of changes you made, click the "Update" button to display the formatted text in the bibliography box at the bottom of the window.

### 6.2.3 Citation settings

Once you have entered the basic information about a style, you have to create sub-styles for each reference type. Most formatting rules are set in this Window. The following section explains all the settings on the "Citation / Endnote or Footnote" tab.



### Number or Text

---

The screenshot shows a dialog box titled "Number or Text" with two tabs: "Sort Order" and "Repeated Citations". The "Number or Text" tab is active. It features a checked checkbox labeled "Use Number" with a "Font" button to its right. To the right of the checkbox is a "Range Delimiter" field containing a hyphen. Below this is a section titled "Text before and after the citation" with two text input boxes, each followed by a "Font" button. At the bottom, there is a "Separator in multiple citations" field containing a comma.

#### **User number**

If this box is checked, Bioscape will use a number in the formatted citation. You can set the font for this number by clicking on the "Font" button next to it. You can change the number to superscript, italic, etc. When you uncheck this box, the "Templates" box will become enabled so you can put Authors and Year into the templates. The formatted citation will use author-date instead of a number.

#### **Range delimiter**

When using a number for the formatted citation, you should specify a range delimiter when there is more than one reference cited together. For example, when 3 references are cited together, instead of using (1, 2, 3), Bioscape will put the range delimiter between the first and last number (1-3).

#### **Text before and after the citation**

In author-date system, formatted citations are surrounded by parenthesis. The two edit boxes are used to specify what text should be used before and after the citation. Even when numbers are used for formatted citations, they are usually surrounded by parenthesis as well.

#### **Separator in multiple citations**

When citing more than one reference together, each reference should be separated from others by a symbol. You should put the separator text in this box. Usually ";" is used as the separator in the author-date system, and "," is used between numbers.

## Ambiguous Citations

Sort Order | Repeated Citations

Number or Text | Ambiguous Citations

How to differentiate ambiguous citations

Include author initials or full name

Name format: JP Smith

Include more authors until citation is unique

Add the title for different works by the same author

Include short title

Add a letter after the year

1998a,b | 1998a, 1998b

Sometimes, you may need to cite two authors with the same name, published in the same year, or two papers by the same author published in the same year. In such cases, the formatted citations will be the same when you use the author-date system. Bibloscape provides several ways to resolve this ambiguity according to the requirements of a specific style.

### **Include author initials or full name**

If the formatted citations only have the last name displayed, the ambiguity can be resolved by including initials. You can choose how initials should be added using the name format combo box. This approach can't resolve ambiguity caused by the same author publishing two papers in the same year.

### **Include more authors until citation is unique**

For research papers, there is usually more than one author. By including more authors, you can usually resolve the ambiguity. But this doesn't guarantee it.

### **Add the title for different works by the same author**

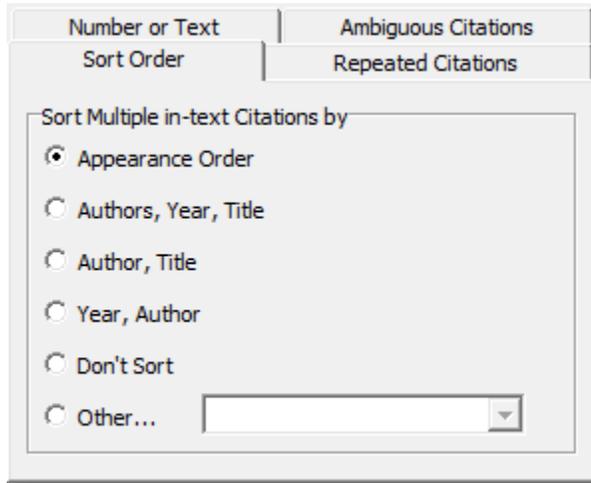
It is almost impossible for two publications by the same author in the same year to have the same title, so this approach is guaranteed to resolve the ambiguity. You have the option using "Short Title". If there is no data in the Short Title field, the regular title will be used instead.

### **Add a letter after the year**

The other way to guarantee a resolution is to add a letter to the end of the citation. For example, the first ambiguous citation will be letter "a", and the second one will be letter "b". When there are two ambiguous citations cited together, you have the option to show them together like (Smith 1998a,b) or show them separately like (Smith 1998a; Smith 1998b).

## Sort Order

---



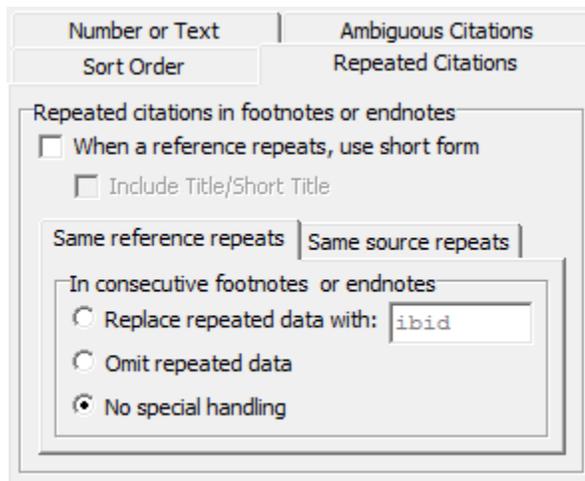
### **Sort multiple in-text citations by**

When citing multiple references together in the author-date system, most styles require the references to be sorted in some way. For example: (Allen 1990; Johnson 1992; Smith 2000). Biblioscape provides several ways to sort these references. You can also choose not to do any sorting. If you want to sort them by data, other authors, year, or title, check the box "Other..." and pick the field as the sorting field.

## Repeated Citations

---

When defining a style that uses endnotes or footnotes, many data fields will be added to the templates box. According to some style requirements, if the same reference is cited the second time or when the same reference is cited twice one immediately after the other, you must abbreviate the second one with text like "ibid", while other styles may require omitting the repeated text.

**When a reference repeats, use short form**

If this box is checked, when a reference is cited the second time in a footnote or endnote, only Authors and Cited Pages will be shown. If "Include Title/Short Title" is also checked, the Title field will be inserted between the Authors and Cited Pages fields. If there is data in the Short Title field, Short Title will be used instead of Title.

**Same reference repeats**

If the same reference is cited immediately after the first appearance in a footnote or endnote, Bibloscape can replace repeated data with text like "Ibid.", omit repeated data, or perform no special steps.

**Same source repeats**

If two references have the same source, like when they are published in the same journal, and one is cited immediately after the other, you can replace repeated data with text like "ibid", or perform no special procedures.

## Templates

The templates box lists all the fields that will be shown in the "Citation / Footnote or Endnote" section. For example, in the citation author-date system, only the "Authors" and "Year" fields will be included. For a footnote style, lots of fields will be included. To add text before and after a field, double click on a field item in the templates box. If there is no data in a specific field, the text before and after that field won't be shown either. Click the "Update" button at the top to show the changes you have just made.

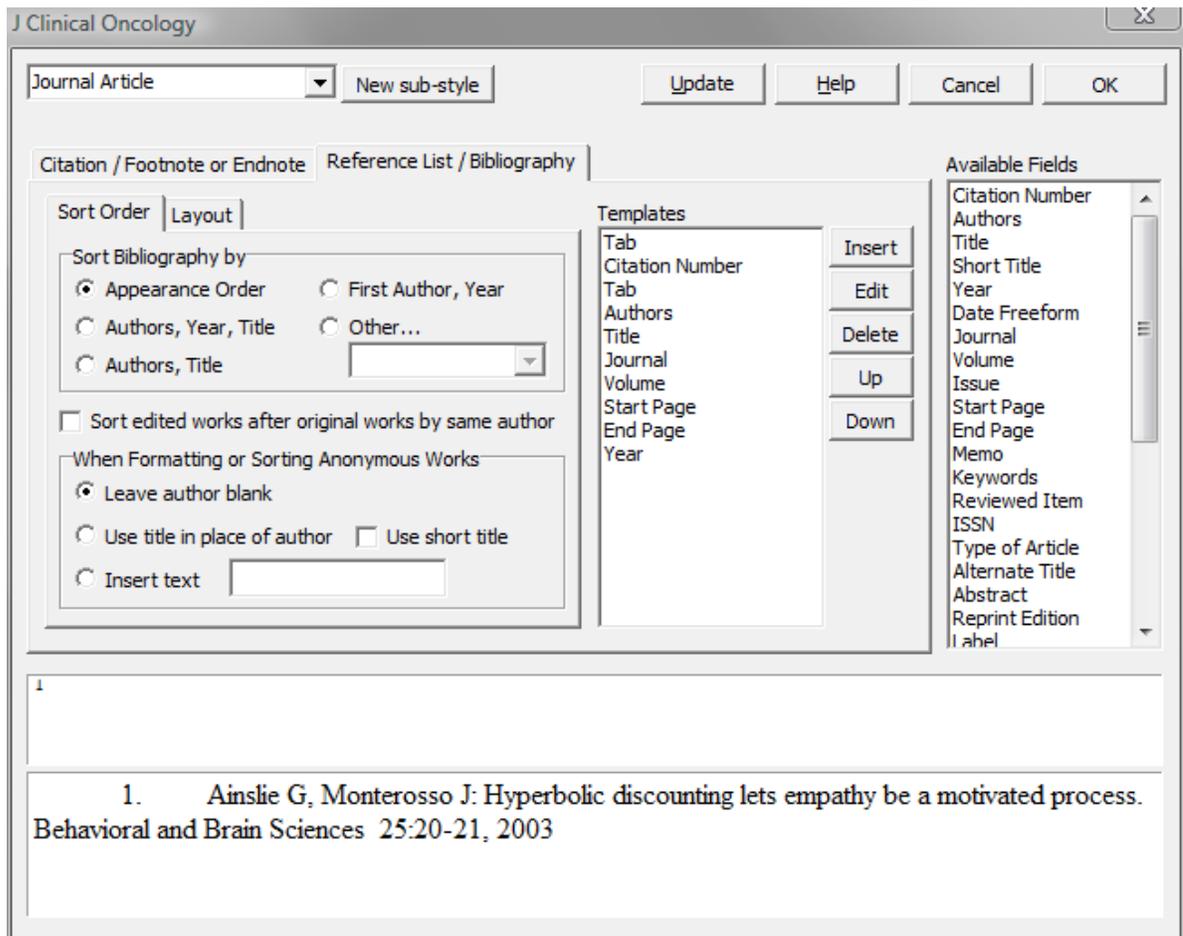
Citation / Footnote or Endnote		Reference List / Bibliography	
Sort Order		Repeated Citations	
Number or Text		Ambiguous Citations	
<input type="checkbox"/> Use Number	Font	Range Delimiter	-
Text before and after the citation			
(	Font	Citation	)
Separator in multiple citations		; .	
		Templates	
		Authors	Insert Edit Delete Up Down
		Year	

*In-text citation: Author-Date*

Citation / Footnote or Endnote		Reference List / Bibliography	
Sort Order		Repeated Citations	
Number or Text		Ambiguous Citations	
<input type="checkbox"/> Use Number	Font	Range Delimiter	-
Text before and after the citation			
	Font	Citation	
Separator in multiple citations			
		Templates	
		Authors	Insert Edit Delete Up Down
		Title	
		Reviewed Item	
		Journal	
		Volume	
		Issue	
		Year	
		Cited Pages	
		Static Text	

*Footnote: List all the fields that will appear in the formatted footnote*

## 6.2.4 Bibliography settings



No matter which citation system you chose to use, a list of all references cited in your manuscript will be shown at the end of the manuscript. While an in-text citation is used, no matter if it is author-date or just a number, the list is called the reference list. When a footnote or endnote is used for citing reference, the list at the end is usually called the bibliography. In this tab, you not only need to decide which fields will be included, but you also have to set a few other things like sort order and layout.

## Sort Order

---

Sort Order | Layout |

Sort Bibliography by

Appearance Order     First Author, Year

Authors, Year, Title     Other... [dropdown]

Authors, Title

Sort edited works after original works by same author

When Formatting or Sorting Anonymous Works

Leave author blank

Use title in place of author     Use short title

Insert text [text box]

### **Sort Bibliography by**

This setting decides how references will be sorted in the reference list / bibliography section. When numbers are used in a citation, the reference list should be sorted by "Appearance Order". The "Other..." option is usually not used unless you are creating a special style for reporting purposes. When the "Other..." option is checked, you can sort the references based on any data field in Biblioscape.

### **Sort edited works after original works by same author**

For references that only have editors instead of authors like "Book Edited", the editors field will be placed at the beginning. You can instruct Biblioscape to put such references after references of original works with the same author.

### **When formatting or sorting anonymous works**

If a reference has no authors, there are several ways deal with it. You can choose to leave the author blank, use the title in place of author (use short title if available), or insert text like "anonymous".

## Layout

The screenshot shows a dialog box with two tabs: 'Sort Order' and 'Layout'. The 'Layout' tab is active. At the top, there is a 'Bibliography title' label and a text input field containing 'References:'. Below this, there are two main sections: 'Indentation' and 'Spacing'. The 'Indentation' section has two input fields: 'First line (inch)' with a value of '0.0' and 'Hanging (inch)' with a value of '0.0'. The 'Spacing' section has two dropdown menus: 'Line spacing' set to 'Single' and 'Space after' set to 'Single'.

### **Bibliography title**

Insert whatever text needs to be shown at the beginning of the bibliography section, like "References:"

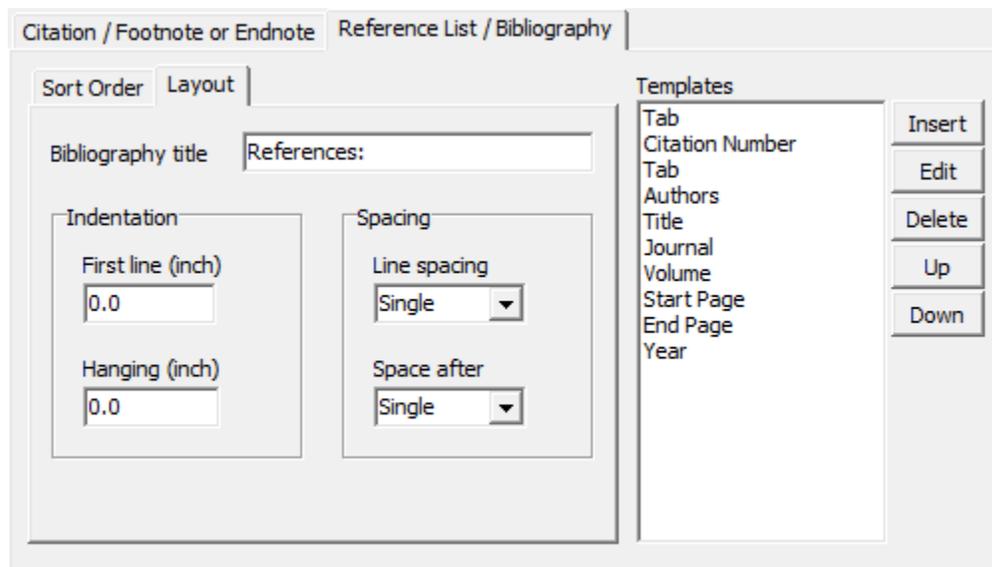
### **Indentation**

The formatted reference list can have the first line indented at half inch if you set the "First line" to "0.5" and "Hanging" to "0.0". You can also display the reference list in hanging style by setting the "First line" to "0.0" and "Hanging" to "0.5".

### **Spacing**

"Line spacing" controls the space between each line inside a reference, while "Space after" controls the space between each reference.

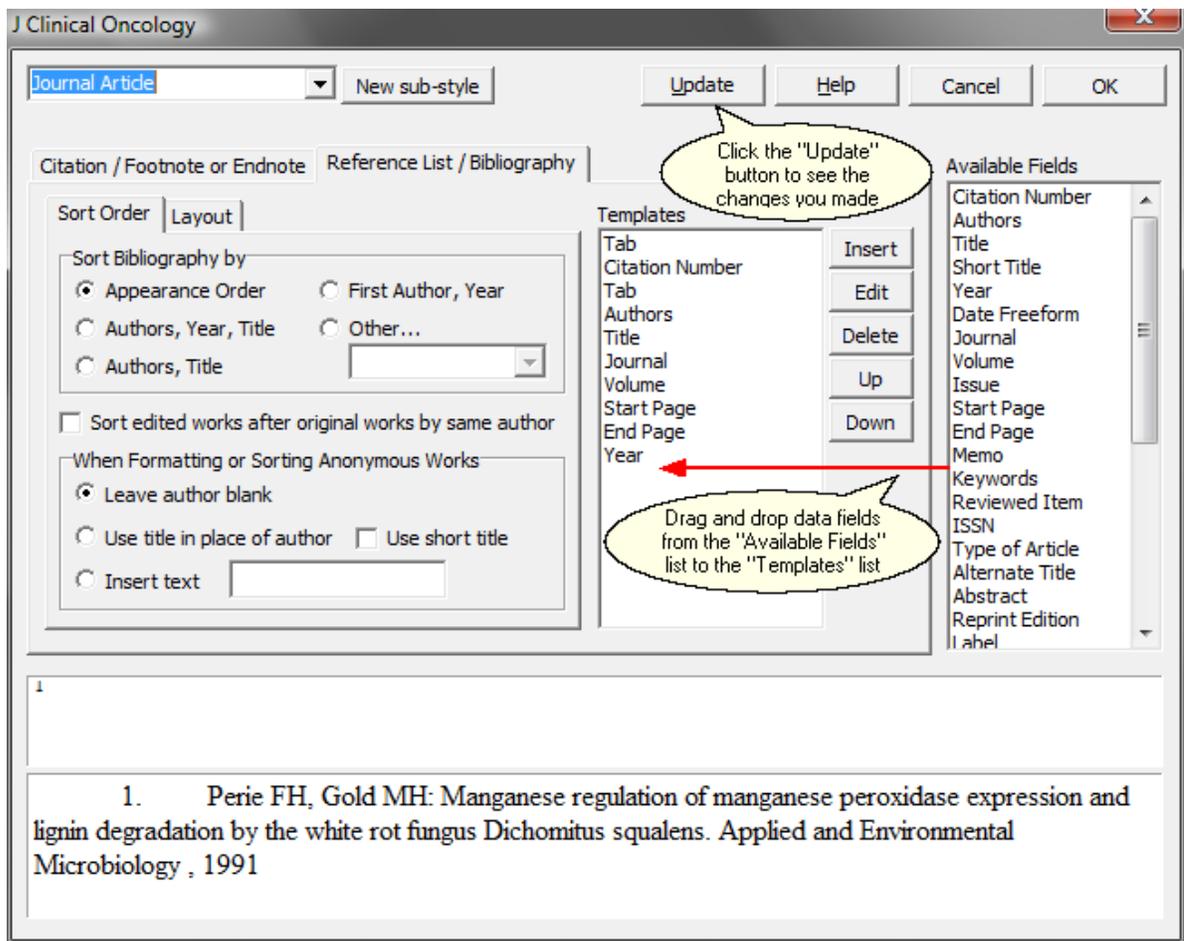
## Templates



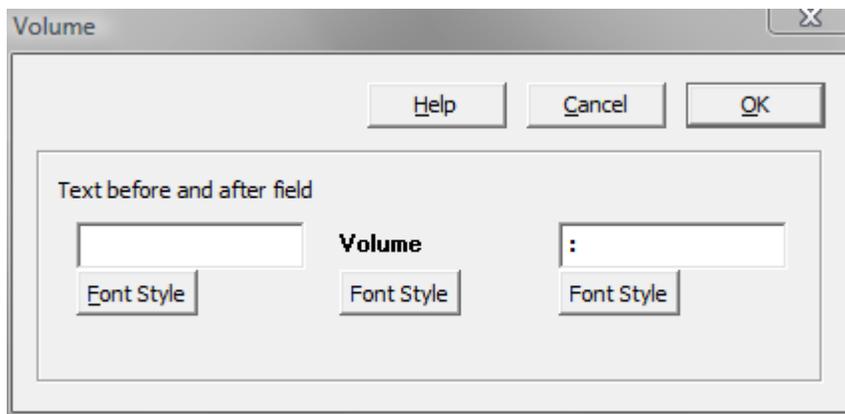
The templates box lists all the fields that will be shown in the "Reference List / Bibliography" part. You can drag and drop field items from the "Available Fields" box to the "Templates" box. Once all the fields are in the correct order, double click on each field item to set format properties, as well as the text to appear before and after the field text. If there is no data in a specific field, the text before and after that field won't be shown either. Click the "Update" button at the top to show the changes you have just made.

### 6.2.5 Templates field format

The "Templates" list in the "Citation / Footnote or Endnote" tab or the "Reference List / Bibliography" tab shows the display order of included fields. To specify how a reference should be displayed, data fields like "Authors", "Title", etc. are entered into the "Template" list box. You can drag and drop a field from the "Available fields" list box into the "Template" list box, or you can use the Insert button. First, make sure the order of the fields are correct by dragging and dropping or clicking the Up or Down buttons.



Text before and after a field



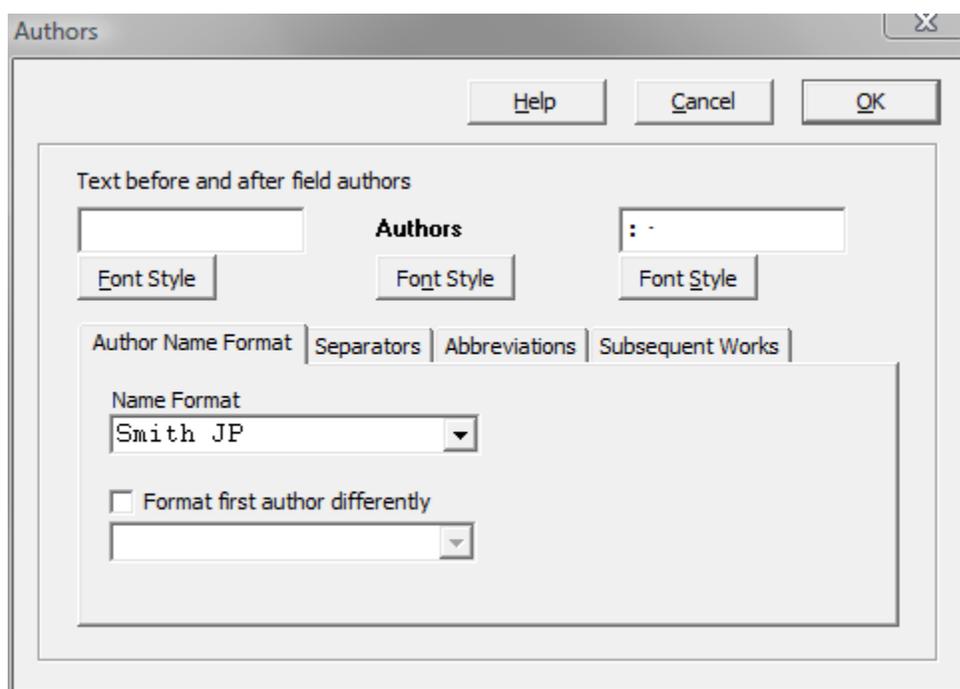
Double click on a field in the "Template" list box to specify how a field should be formatted. You can change its font properties or other properties that are specific to a field. There are two edit boxes before and after the field label. The text in these two edit boxes are dependent on the data field. If there is no data in a field, the text put in the Before and After edit boxes won't be shown, such as when you put "-" in the Before edit box of the field "End Page". If there is no end page for

a specific record, the text "-" won't be shown.

### The use of escape character

Biblioscape formats documents in RTF or HTML format. The RTF format is used most of the times. In RTF, there are certain characters with special meanings, like: "{", "}", "\". To include these characters in the Before and After edit boxes, you need to put the escape character "\" before it. For example: if you want to put "\" in the Before edit box, you should use "\\" instead of "\".

### Authors format



Formatting parameters for author fields is more complicated than for other fields. As with all other data fields, you can add static text before and after "Authors". The font style of this text can be changed after clicking on the "Font Style" button. Use a caret "^" to separate singular and plural versions of label text after the authors field. For example, when defining a style for the "Editor" field, you can put " Ed. ^ Eds. " as the label text after the field. When there is only one editor, " Ed. " will be used; when there are more, Biblioscape will use " Eds. ".

### Author Name Format

There are different ways to format author names; you can select the name format required by the current journal using the combo box "Name Format". Some journals use a different name format for the first author. If this is the case, keep the checkbox "If first author is different" checked, and select a name format for the first author using the combo box below it. You also need to specify the text to use in case the reference does not have an author; usually "anonymous" is used.

### Separators

Author Name Format | Separators | Abbreviations | Subsequent Works

When there are two names in list  
 First author  Second author

When there are more than two names in list  
 First author  Second author  Last author

In the next section you can specify the text that separates the first author from the second when there are only two. For example, "and " is often used. When there are more than two authors, you need to provide the separator between authors, as well as the text to use before the last author.

### Abbreviations

Author Name Format | Separators | Abbreviations | Subsequent Works

Abbreviations

List all authors name

Abbreviate author list

If there are  or more authors,  
 list the first  Names,  
 then append   Italic

Some references have a large number of co-authors. You can choose to limit the number of co-authors to be listed by selecting "Abbreviate author list". You can e.g., and specify that if there are more than 2 co-authors. Then, only the first author will be shown and "et. al." will be appended. This kind of definition is common for author fields in "Citation Sequence". You can also specify that static text should be used if there are more than a certain number of co-authors.

### Subsequent Works

Author Name Format | Separators | Abbreviations | Subsequent Works

For subsequent works by the same authors

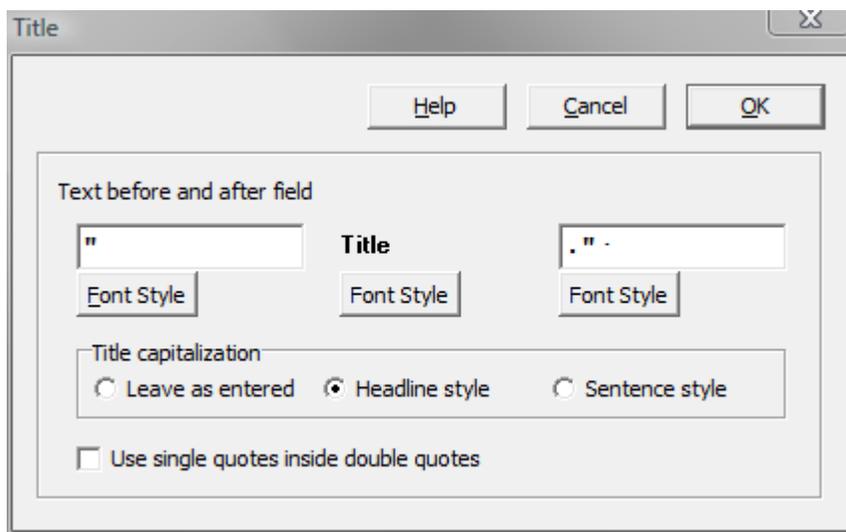
List author names normally

Omit author names

Replace author name with

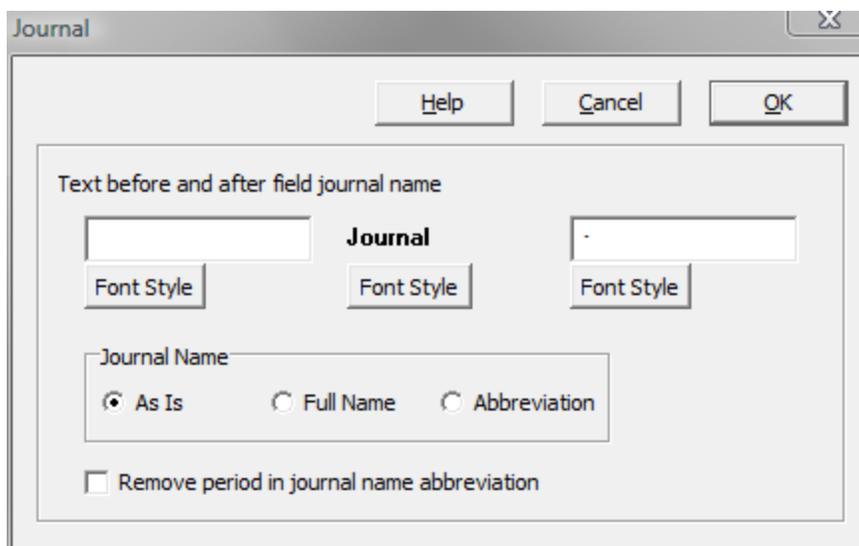
This tab will be shown if the authors field is included in the citation or footnote. It will be shown when Authors is added to "Reference List / Bibliography". It determines what to do when the same reference appears more than once. You can choose to "List author names normally", "Omit author names", or "Replace author name with" a static text. For example, MLA style requires the authors to be replaced by "---" for subsequent works.

## Title format



You can enter static text before and after "Title" fields and change the corresponding "Font Style". You may e.g., and want to include quotation marks before and after the title. Enter a quotation mark in the box before and a quotation mark in the box after the label "Title". Some journals require you to use title case for the title text. In such a case, select "Title case". Biblioscape can automatically convert the text of the title to title case. Some styles like "American Journal of Sociology" require quotation marks inside double quotations be changed to single quotations. In such a case, check the box "Use single quotes inside double quotes".

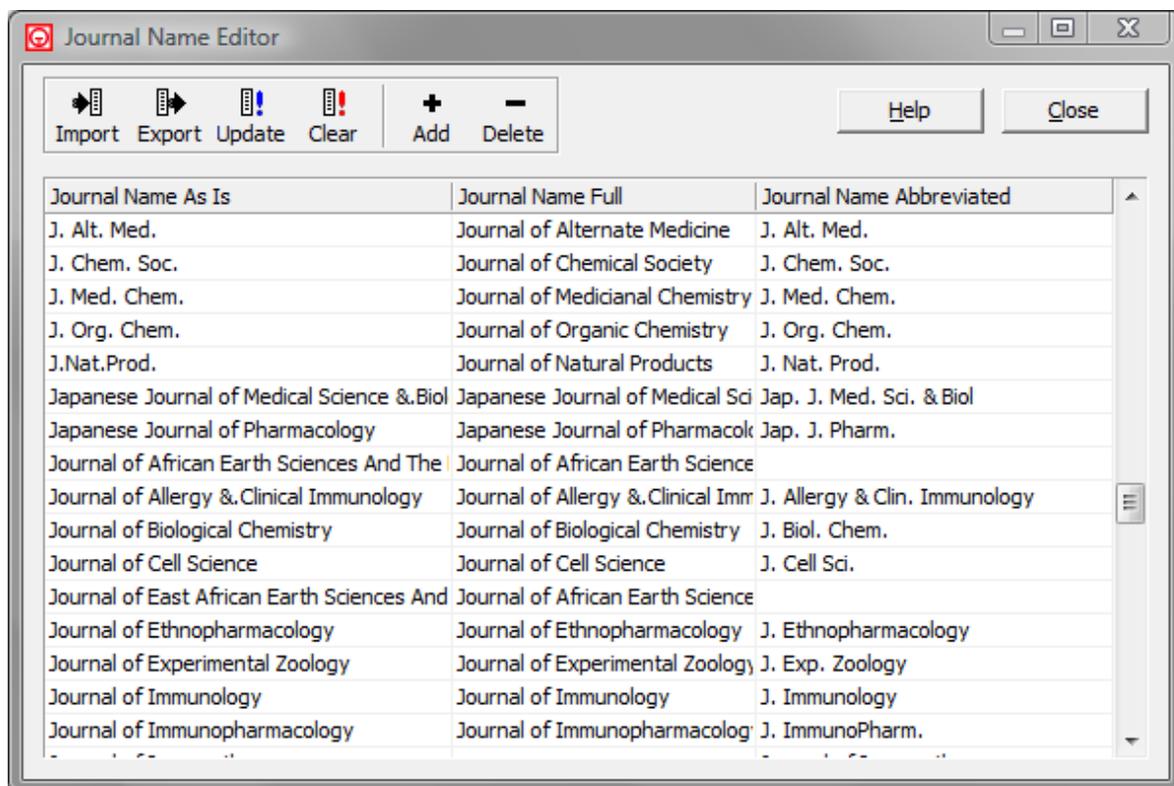
## Journal format



You can add static text before and after the "Journal" field, and change the "Font Style". You can choose whether to use "Standard Abbreviation" for the journal name or use its full name. If the

current journal is not included in the journal table, no matter what form you select, the journal name as entered for the current record will be used.

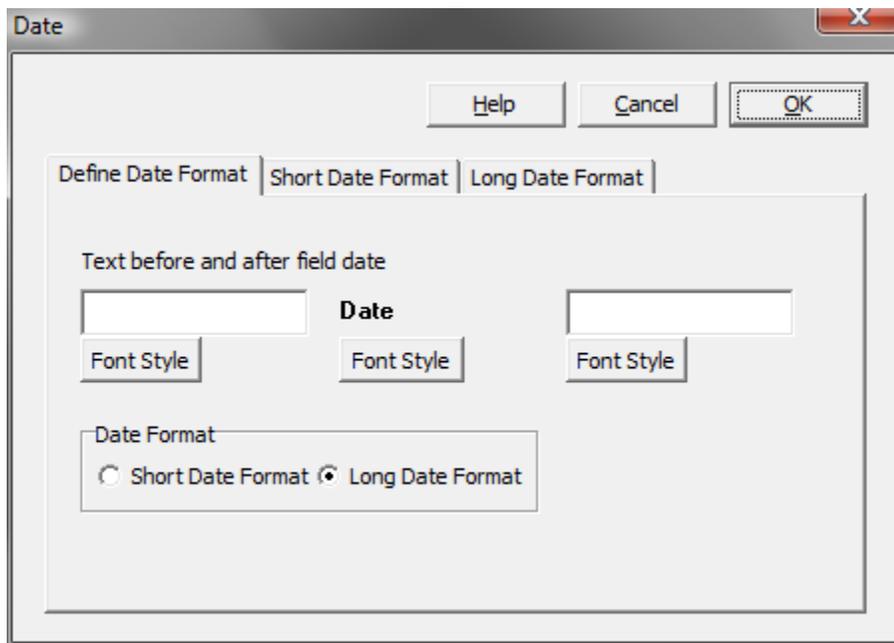
When a "Journal Article" record is entered into the database, usually only one journal name is entered, which could be a full journal name or an abbreviation. Biblioscape keeps track of all journal names in a table. You can add a full journal name or an abbreviation using "Journal Name Editor".



To open Journal Name Editor, click on menu command "Tools | Styles | Journal Name Editor". You can add, delete, edit, or search existing journal name entries.

- Import / Export: Click on the "Export" button to write a comma delimited journal name file of existing journals. Click on the "Import" button to import such a file.
- Updating: Click on the "Update" button to scan your database for journal names not already in the journal name table. The existing journal names will not be touched. If you want the journal name table to reflect the currently opened database, click on the "Clear and Update" button.

## Date format style



Static text can be added before and after date fields. The font style of a date field and the static text before and after it can be changed after clicking on the "Font Style" button. You have the choice between "Short Date Format" and "Long Date Format". "Short Date Format" does not include weekday information.

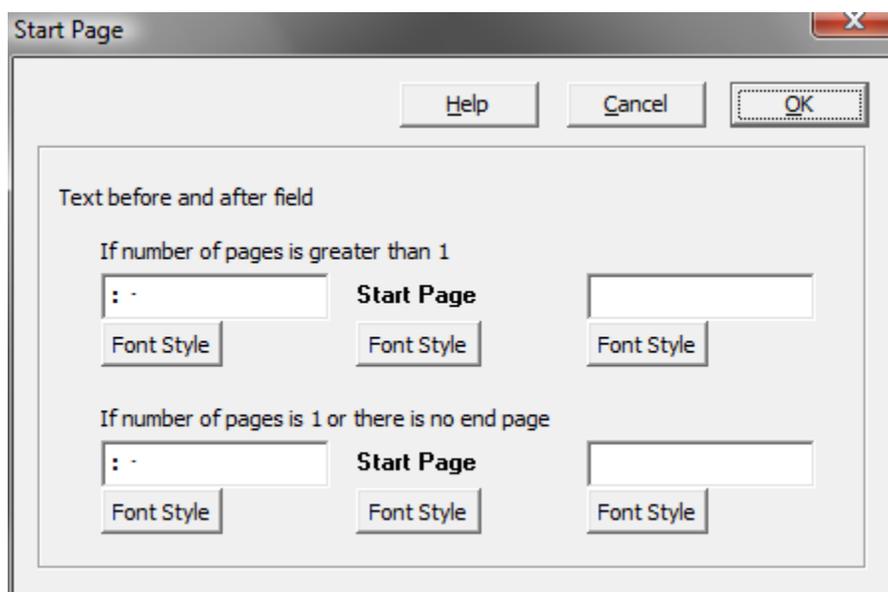
**Short Date Format** includes "Year", "Month", and "Day" in an order that can be changed using the combo box "Order". You can specify a separator between them by entering it into the box "Separator between M, D, and Y". For the "Day" and "Month" fields, you need to specify whether to include leading zeroes. For example, if you want the date to be formatted as "8/6/94", then select "No" in "Day (Month) leading zero" radio box. For the "Year" field, select whether to include the century. For example, if you want "Year" be formatted as "8/6/1994", then select "Yes".

The screenshot shows the 'Define Date Format' dialog box with the 'Long Date Format' tab selected. The 'Order' dropdown is empty. The 'Separator between Month, Day, and Year' field is empty. There are three radio button groups: 'Day leading zero' with 'Yes (06)' and 'No (6)' options; 'Month leading zero' with 'Yes (08)' and 'No (8)' options; and 'Century' with 'Yes (1994)' and 'No (94)' options.

**Long Date Format** includes an extra "Week Day" field. First, you have to decide the order of display for "Year", "Month", and "Day"; then, whether to add "Week Day" before or after the date field. The format of the "Month" field can be either a number or word. As with "Short Date Format", the "Day" field can include a leading zero, and the "Year" field can include the century. The separator between "Year", "Month", "Day", and "Week Day" can be customized. You can use the full or the abbreviated form of "Day of the Week".

The screenshot shows the 'Define Date Format' dialog box with the 'Long Date Format' tab selected. The 'Order' dropdown is set to 'Day Month Year'. The date format is displayed as 'Aug - 6 . - 1994 Saturday /'. There are two checked radio buttons: 'Include day of week before date' and 'Include day of week after date'.

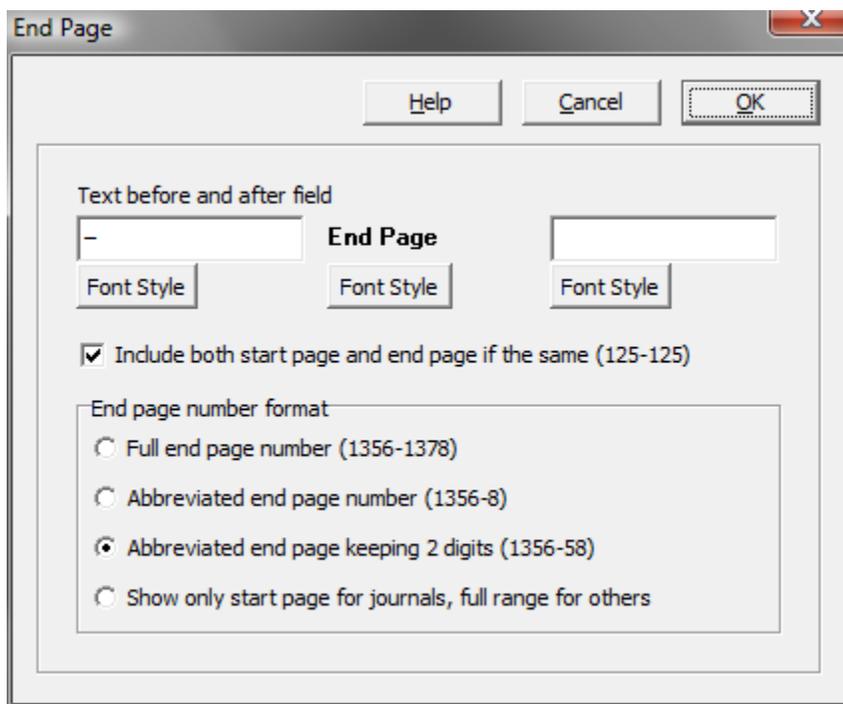
## Start page format



Two situations can occur in the formatting of the "Start Page" field. "If number of pages is greater than 1", usually requires you to provide a separator such as "-" or ", " between the start page and end page. "If number of pages is 1" can be formatted differently. The font style of the start page, as well as the static text before and after can be changed after clicking on the "Font Style" button.

Use a caret "^" in the label text before the "Start Page" field to separate situations with or without an end page. For example, you can put "P^Pp" as the label text before the "Start Page" field. If there is no end page or start page and end pages are the same, "P" will be used. When there is an "End Page", "Pp" will be used.

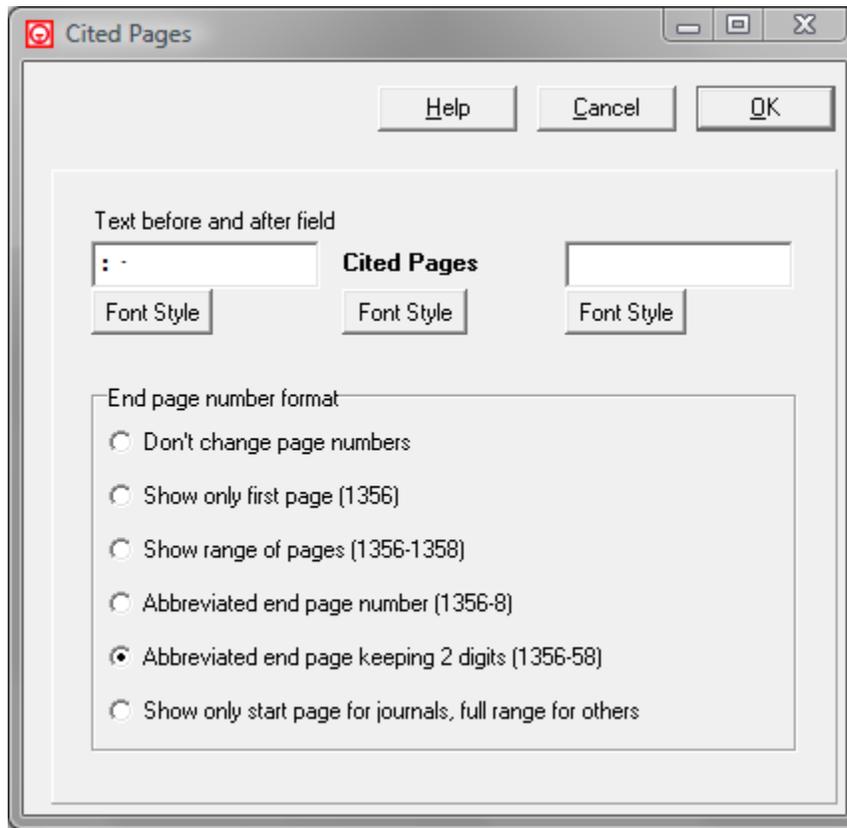
## End page format



You can add static text before and after the "End Page" field, and change the font style of the corresponding text after clicking on the "Font Style" button. If the start page and end page are the same and you want to display both of them, keep the checkbox "Include both start page and end page if the same" checked. If the end page and start page are different, you can display both pages as is, or you can only display the difference between the end page and start page. Select your choice using the radio box "End page number format".

Use a caret "^" in the label text after the "End Page" field to separate situations with or without end pages. For example, you can put "P^Pp" as the label text after the "End Page" field. If there is no end page or start page, and the end page is the same, "P" will be used. When there is an "End Page", "Pp" will be used.

## Cited pages format



When citing references in author-date format, sometimes you want to include the cited pages. In Biblioscape, there are two ways to do so.

#### Use a citation suffix

When you want to add cited pages to an in-text citation, you can include (cited pages) after the author-date section inside the temporary citation. Here is an example:

Temporary citation: [Smith, K. 1992 (, pp. 45-47) #23]

Formatted citation: (Smith, 1992, pp. 45-47)

More information can be found at "Add prefix and suffix to a formatted citation".

#### Use "Cited Pages"

For some footnote or endnote styles, cited pages is an integral part of the footnote or endnote. In such cases, it requires more flexibility if cited pages are formatted. For example: deciding whether to add "p." or "pp." before the page number, and deciding how to include the page range and do the abbreviation. If the style you use has "Cited Pages" defined in the "Citation / Footnote or Endnote" templates, you should include cited pages in the form of "@45-47". Here is an example:

Temporary citation: [Sood, A. 1989 @45-47 #23]

Formatted footnote: A. Sood, B. F. Spielvogel and B. R. Shaw, "Boron-containing Nucleic Acids: Synthesis of Cyanoborane Adducts of 2'-Deoxynucleosides," J. Am. Chem. Soc. 111 (1989): 45-47.

In the above example, ": " is added before the cited pages because the style editor allows you to specify what text is to appear before and after the cited pages. The "Cited Pages" text is treated as a regular field in Bibloscape. In the style editor, if you double click on the "Cited Pages" item, the "Cited Pages" format window will be shown. You can specify the text before and after this field, the font used for all the text, as well as the "End page number format".

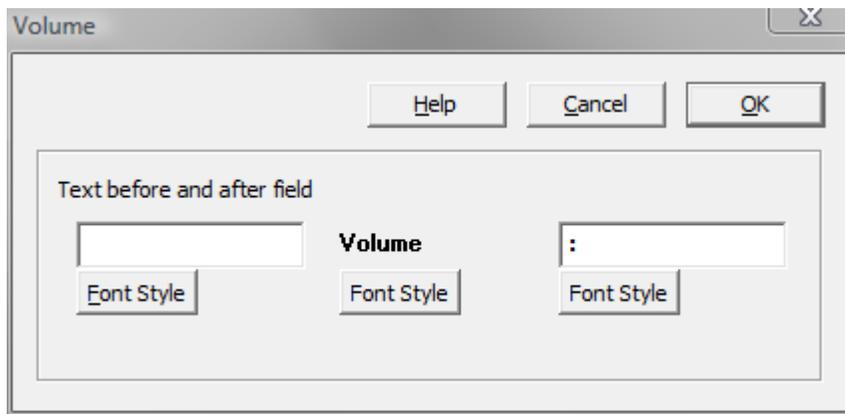
#### End page number format

Don't change page numbers	The cited pages will be added as you enter them.
Show only first page (1356)	Only the start page will be shown.
Show range of pages (1356-1358)	Full page range will be shown.
Abbreviated end page number (1356-8)	The end page number will be abbreviated to the last possible digit.
Abbreviated end page keeping 2 digits (1356-58)	Keep two digits when only one is needed.
Show only start page for journals, full range for others	Hide start page when reference type is journal article.

Note: Sometimes you may need to cite several pages like "23-45, 66, 112". In other cases, you may need to use Roman numbers like "ix" or use a paragraph section number. If Bibloscape cannot find a page range correctly, it will treat what you put in the cited pages as is. For example, if you put "23-45, 66, 112" or "ix" as the cited pages, Bibloscape will use it as is without any changes.

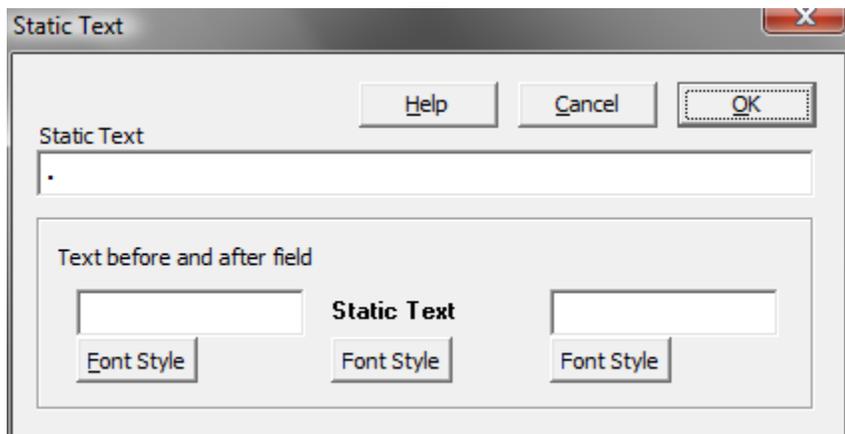
Note: Use caret "^" in the label text before or after the "Cited Page" field to separate situations with or without an end page. For example, you can put "P^Pp" as the label text before the "Cited Page" field. If there is no end page or start page and the end page is the same, "P" will be used. When there is an "End Page", "Pp" will be used.

### Generic format



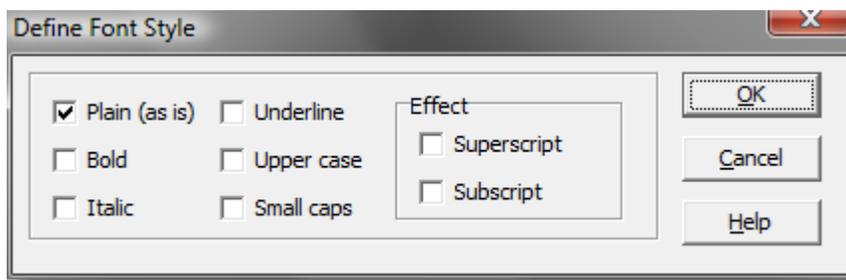
Most data fields use the following window to define their format for format filters. The name of the current data field is shown in the middle in bold. You can add static text before and after the data field. The font style of the data field text as well as the static text before and after can be changed after clicking on the corresponding "Font Style" button.

### Static text format



If you want to add text that is not present in your data, you can use the static text field. For example, you may want to add a period "." after the data field "End Page". So, in case the "End Page" field is not available, the "." can still be added at the end.

## Font style



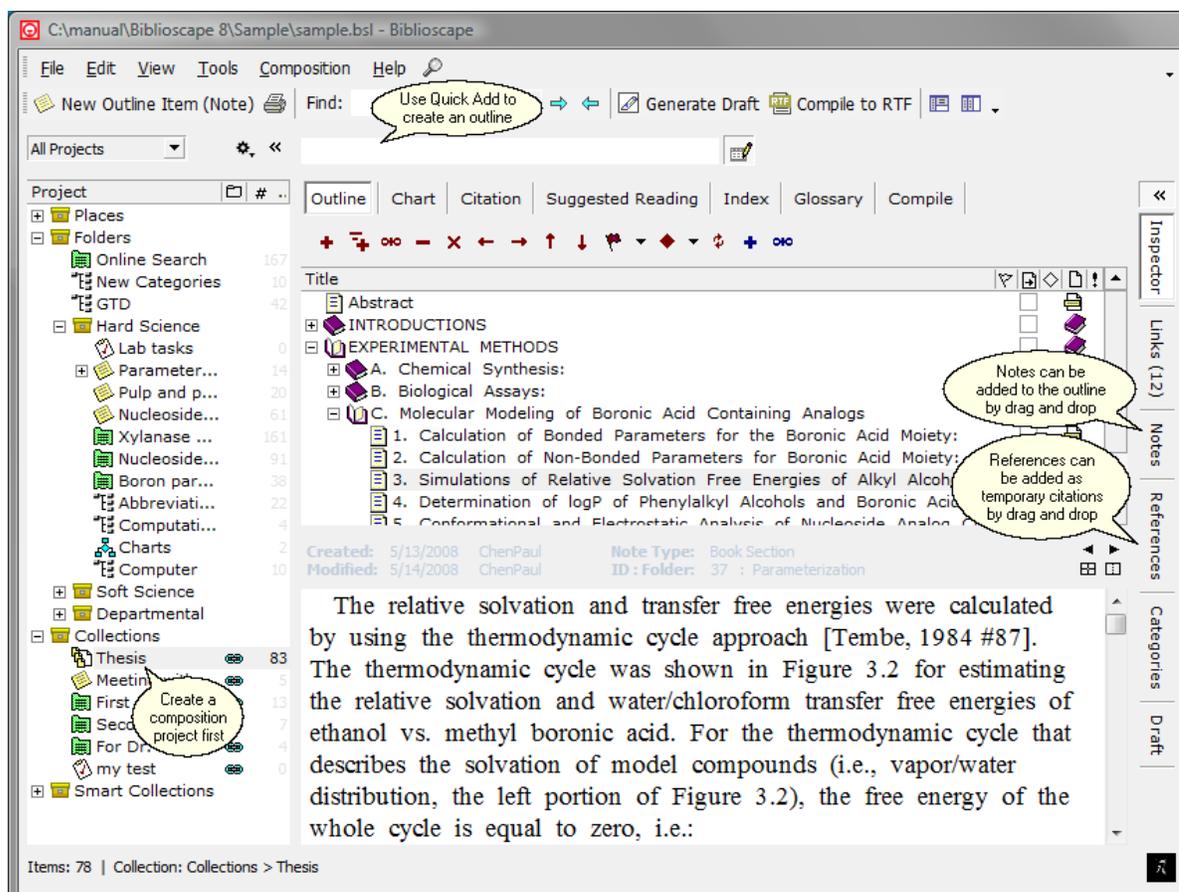
You can change the font style of data fields or static text in format filters using the window "Define Font Style". View the result of your changes by clicking on the "Update" button on the window "Define Format Filter".

## 6.3 Composition module for writing books and theses

The composition module is designed to help users writing a thesis or a book. Working on such a big project is an evolutionary process. You start off by collecting references, files, web clippings, etc. You may first write a few notes. Those notes will evolve into sections or chapters. The composition module allows you to easily organize your pieces into an outline. For a big writing project like a thesis or book, it is much easier to separate your writing into smaller pieces instead of one big file. The composition module supports the reuse of your notes. You can create more than one composition project and quickly assemble the same notes into different outlines, then compare the drafts. The composition module can help you to generate a table of contents, formatted citations and a bibliography, a suggested reading list, a glossary, and an index automatically for the final draft.

### Create a composition project

Before going into the composition module, you need to create a composition project. Click the menu command "File | Project | New Collection...". The project properties window will be shown. Enter a composition project name. Select "Composition" as the project type. If you want, you can give a brief description about the project in the box below. Click the OK button. A new project will be added to your project tree. You can drag and drop it to different position in the project tree.



### Building blocks

Notes from the notes module are the building blocks of a composition project. All outline entries are based on notes. You can drag-and-drop notes to a composition outline. The same note can be added to more than one composition project. When the note content is changed, the drafts built from those outlines are all changed accordingly.

### Content reuse

The composition module promotes content reuse. Besides the reuse of notes in different outlines, references and categories are also reused. If you enter a reference entry once, it can be inserted as a temporary citation into many notes. You can also drag-and-drop a reference to the suggested reading list. A category entry can be added to many notes in an outline as an index term or added to the glossary list.

## 6.3.1 Create an outline

An outline breaks down the parts of your thesis in a clear, hierarchical manner. It is the road map of your writing, so you know what should be included and in what order. When it comes to building an outline, there are two groups of people. The first group likely to create an outline at the initial stage of the writing project. The second group likely to start writing the details first. Only at some

later stage do they start to build an outline and finish off the rest. Bibloscape can be used for both approaches.

### Build an outline with Quick Add

This is for people who want to create an outline quickly. It works the same way as the brainstorming feature in the notes module. First, click the Quick Add button to display the Quick Add box. Enter an outline item in the box and press the Enter key. Start typing your next outline item and repeat the process. Each item will be created as a note in the notes folder. It will be stored in the last note folder you opened. A link will be automatically added between the note and your composition project, so the newly created notes will be shown in your composition folder.

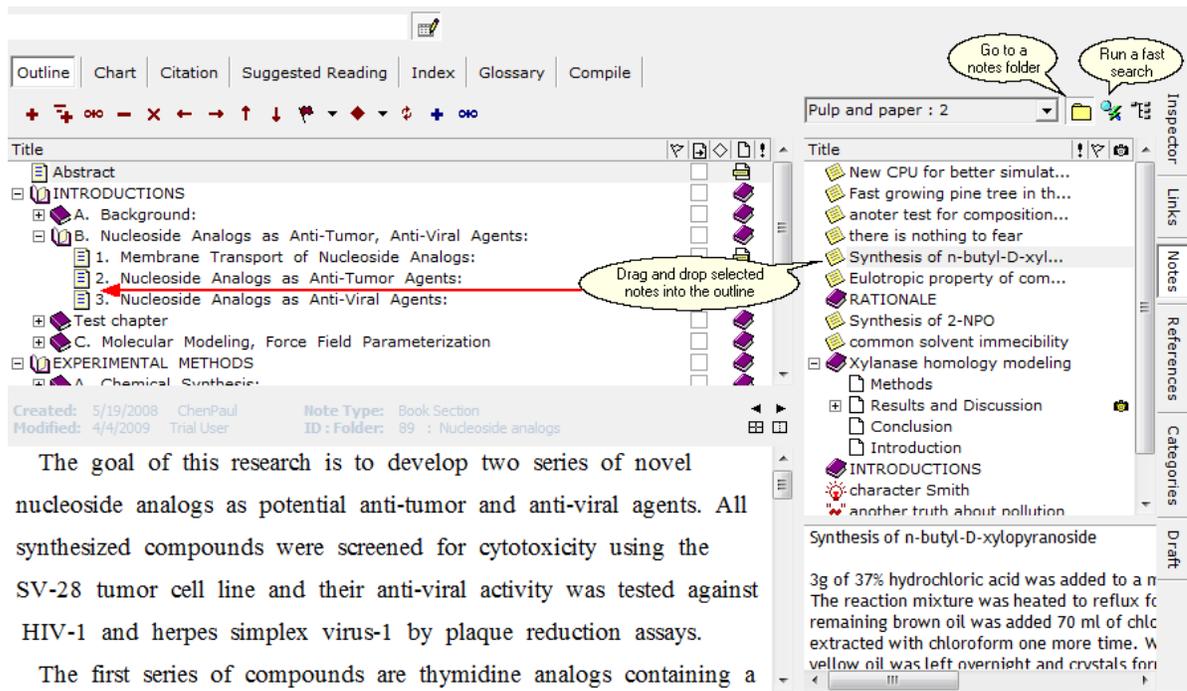
The goal of this research is to develop two series of novel nucleoside analogs as potential anti-tumor and anti-viral agents. All synthesized compounds were screened for cytotoxicity using the SV-28 tumor cell line and their anti-viral activity was tested against HIV-1 and herpes simplex virus-1 by plaque reduction assays.

The first series of compounds are thymidine analogs containing a

### Build an outline from existing notes

For writers who like to work on details directly and build an outline later, Bibloscape provides an easy way to create an outline from existing notes. Click on the "Notes" tab on the right. You can select a notes folder at the top or run a fast search to find the notes you want. Then select the

notes you want to add to the outline. Drag the selected notes and drop them into the outline.



### 6.3.2 Write a first draft

An academic writing project can be divided into two main parts: researching and writing. At this stage, you have finished researching the topic, gathering source material, and reading and annotating your source material. You may also have built an outline for your writing. Now, it is time for you to fill details into your outline, make arguments and provide evidence for your arguments.

#### Write inside the preview panel

In the previous section, we explained how to add an outline item with Quick Add. You can add content to an outline item directly inside the preview pane without leaving the composition module. You can re-arrange the order of an outline item by using drag and drop. You can change the ordering of your note by clicking the up and down buttons or by pressing the Ctrl+Up and Ctrl+Down keys.

The boronic acid functionality has been incorporated into many structures of biological importance, including inhibitors of serine [Philipp, 1971 #67] and chromatin-bound proteases [Carter, 1977 #68] and inhibitors of cell replication [Goz, 1986 #69]. Other boronic acids were synthesized as effective transition state analogs for enzyme-catalyzed acyl transfer reactions [Koehler, 1971 #70 / Matthews, 1975 #71] and as inhibitors of dihydroorotase [Kinder, 1990 #72]. Boronic acids have also been incorporated into  $\alpha$ -amino

Inspector

Abstract  
Boronic acid has been incorporated into many biologically active compounds. It could act in a similar way to hydroxy group when incorporated into the terminal position of nucleoside analogs.

Keywords  
Boronic acid; Conformational analysis; Acyclovir

General

Title  
B. Rationale And Design Of Nucleoside Analogs Containing A Boronic

Note Type  
Book Chapter

Categories

Date Target  
Status

Label  
Priority | Note ...

Wor... | Target 384

Others

Comp Mark  
Exclude Export   
Page Break Bf   
Keep Format

Misc

### Display two notes side by side

When working on a big project, you may want to display two notes side by side. You can do this by clicking the "One Pane / Two Panes" button. You can change the width of each pane by dragging the divider.

Created: 5/18/2008 ChenPaul Note Type: Book Chapter ID: Folder: 78 : Nucleoside an  
Modified: 4/11/2009 Trial User

Created: 5/18/2008 ChenPaul Note Type: Book Chapter ID: Folder: 77 : Nucleoside  
Modified: 5/20/2008 ChenPaul

The boronic acid functionality has been incorporated into many structures of biological importance, including inhibitors of serine [Philipp, 1971 #67] and chromatin-bound p... 1977 #68] and inhibitors of cell replication [Goz, boronic acids were synthesized as effective transiti... for enzyme-catalyzed acyl transfer reactions [Koehl... Matthews, 1975 #71] and as inhibitors of dihydro... 1990 #72]. Boronic acids have also been incorpo...

alkyltrimethylammonium moiety incorporated into alkylether lipids, resulting in p... *in vitro* neoplastic cell growth [Modest, 1987 #1... C activity [Marasco, 1990 #142], and HIV-1 in... with the mechanism of action is... the effect of this moiety has... investigated in the nucleoside field, incorporat... thymidine and other nucleoside bases was of in...

Toggle the One Pane / Two Panes view

The width of each pane can be changed by dragging the divider

### Mark a note

You may have already noticed that there are are mark columns in the composition module. One is the note mark which doesn't change when a note is put into a different composition project. The other one is the mark for a note in the current composition project. This mark is project dependent. For example, note A is included in two composition projects. In project one, it is marked red in the composition mark column. In project two, the same note could be marked

green.

### Inspector tab

---

The inspector pane in the composition module lists several fields of a note like Abstract, Title, Type, etc. It also lists some properties of a note that are only relevant to the current composition project like Composition Mark, Exclude Export, etc. All these fields can be edited. When you browse to another note, the changes will be changed.

- **Abstract:** You can write a brief summary of your note. When you browse your outline, you can quickly know what the note is about.
- **Keywords:** If you need to build an index for your book or thesis, you should add an index term for each note in the Keywords field. Each keyword should be separated by "; ". When you compile the composition project, there is an option to build an end of the book index.
- **Title:** Title of the currently selected note.
- **Note Type:** Note type of the currently selected note.
- **Categories:** You can tag the currently selected note by entering categories separated by "; ". If the entered category does not already exist in your database, it will be entered automatically in the "New Categories" folder.
- **Date Target:** Enter the target date to finish writing the current note.
- **Status:** Select a pre-defined status for the current note. If the pre-defined list doesn't include the one you want, you can select the "Edit..." item to add new ones.
- **Label:** You can enter a label directly. A label could be anything about the note. You can also select the "Edit..." item to build a list.
- **Priority:** Select a priority item for the current note.
- **Note Mark:** Mark the current note. This mark is assigned to the note. You will see the same mark when you go to the notes module.
- **Word Count:** The number of words the current note contains.
- **Target Count:** The number of words that you want the current note to contain. You can use it to monitor the progress of you writing for each note.
- **Comp Mark:** A mark that is assigned to a note for the current composition project. This mark is not assigned to the note itself. You only see this mark under this composition project. The same note could be marked differently in another composition project.
- **Exclude Export:** If you don't want to include the note in the compiled output, check this

box.

- **Page Break Bf:** If you want to include a page break before the note when it is compiled to produce an output, check this box. You will get a page break before the note in the compiled document.
- **Keep Format:** When Bibloscape compiles all your notes under the current composition project to produce an output, it will use assigned font properties for notes at different levels of the outline hierarchy. If you don't want Bibloscape to use the assigned font for this note, check this box.
- **Misc:** If you want to include anything else about this note, enter it here. You can also paste graphics into this field.

#### Write inside the Draft tab

---

Sometimes you may want to combine several notes in your outline and see how the text flows from note to note. You can do this in the Draft tab. First, select the notes you want to include. Then, go to the "Draft" tab and click the button "Generate Draft". The selected notes will be combined and displayed in the draft panel. The title of each note is highlighted in light yellow and cannot be edited. You can only edit the text. If you want to save the changes you make in the draft panel back to the notes, click the "Save Draft to Database" button.

The screenshot displays the Bibioscape 8 interface. At the top, there is a toolbar with a dropdown menu labeled "Selected" and icons for editing, saving, and printing. Below the toolbar, the main text area contains a draft note. The first paragraph discusses the cytotoxicity of 5-FU. The second paragraph, titled "2. Nucleoside Analogs as Anti-Tumor Agents:", is highlighted in yellow. A callout bubble points to the title of this section, stating: "The title of each note is highlighted and not editable. You can only edit the note text." Another callout bubble points to a "Generate Draft button" icon, and a third points to a "Save changes made in Draft back to notes" icon. On the right side, a vertical sidebar contains tabs for "Inspector", "Links (24)", "Notes", "References", "Categories", and "Draft". At the bottom of the main text area, a status bar shows "Nodes: 3 | Pages: 6 | Words: 1478".

### [Cite references](#)

While working on your first draft, you can insert a citation easily without leaving the composition module. Go to the "References" tab on the right. Select the reference you want to cite and drag and drop it to the live preview panel. The selected reference will be inserted as a temporary citation. You can go to a different references folder or run a Fast Search at the top of the "References" tab.

The screenshot displays the Biblioscape software interface. On the left, a document editor shows a table of contents with sections: Abstract, INTRODUCTIONS, EXPERIMENTAL METHODS, RATIONALE (with sub-sections A, B, and C), and RESULTS AND DISCUSSION. The main text area contains a paragraph about non-bonded parameters, with a citation "[Jorgensen, 1990 #86]" highlighted in blue. A callout bubble points to this citation with the text: "Drag and drop the select reference to the place you want to cite a reference". On the right, a bibliography list shows various references with columns for Year, Authors, and Title. The reference "Jorgensen, W. L.; Briggs, J. M.... Relative Partition Coefficients f..." is selected. Below the list, the "Inspector" panel shows details for the selected reference, including Reference Type (Journal Article), Authors, Title, and Journal information.

### 6.3.3 Build an index, suggested reading list, and glossary

When writing a book or thesis, you may need to create an index, suggested reading list, or glossary. Biblioscape makes it easy to accomplish this.

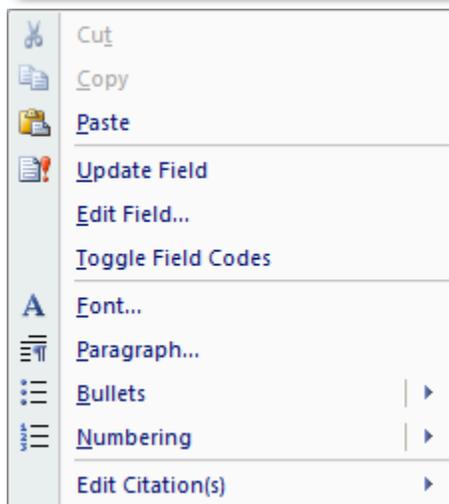
#### Build an index

For each note that is included in your composition outline, there is a keywords field. You can enter your index term in this field. You should separate each index term by "; ". If you need to create a sub-entry index term, you need to separate it from the main term by a ":". For example, "Cancer: Biology". Cancer is the main entry. "Biology" is the sub-entry.

Abstract		Inspector
<p>Enter your index terms associated with the current note in the Keywords field</p>		Links (7)
Keywords		Notes
Cancer: Biology; DNA; RNA		References
<p>Separate each term by ";". Separate index main-entry and sub-entry by ":"</p>		Categories
General		Draft
Title	Cancer:	
Note Type	Book Section	
Categories		
Date Target		
Status		
Label		
Priority	Note M...	
Word ...	Target	227
Others		
Comp Mark		
Exclude Export	<input type="checkbox"/>	
Page Break Bf	<input type="checkbox"/>	
Keep Format	<input type="checkbox"/>	
Misc		

If you go to the "Index" tab at the top of the composition module, all the index terms will be listed along with its associated note. When you click on an index term, Biblioscope will jump to the note that is associated with the index term. The note will be displayed in the preview tab, and the "Inspector" tab will change accordingly. You can see all the other index terms associated with the note in the "Keywords" field.

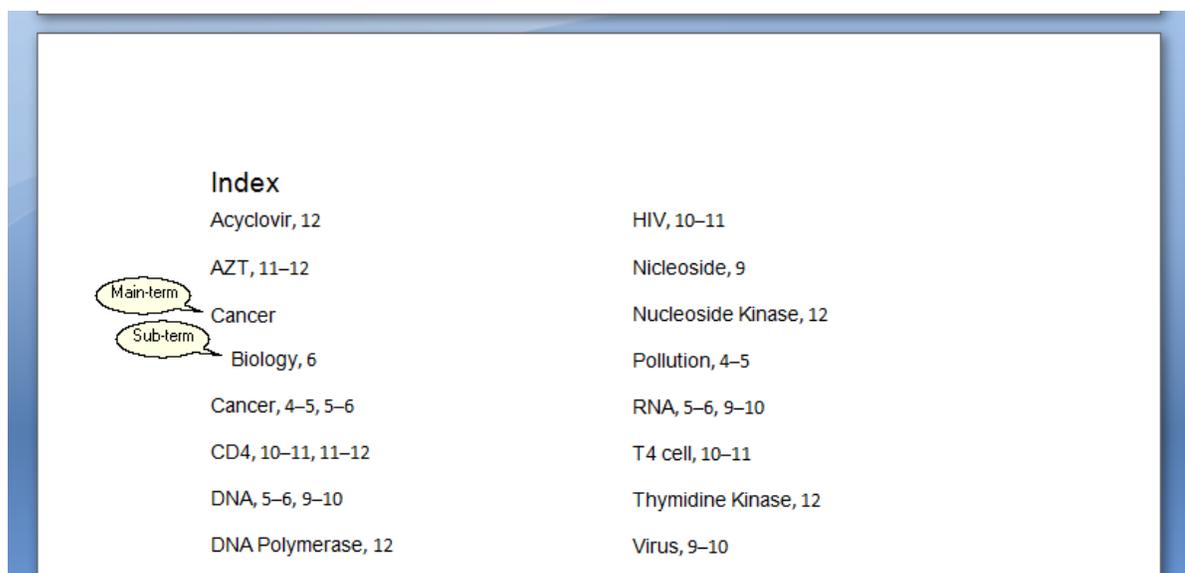
Index Term	Note Title
Acyclovir	B. Nucleoside Analogs as Anti-Tumor, Anti-Viral Agents:
AZT	(4) Anti-viral Drugs:
Cancer	(1) Epidemiology of Cancer:
Cancer:Biolog	(3) Causes of Cancer:
Cancer:Biolog	(4) Cancer Biology:
CD4	(2) Human Immunodeficiency Virus:
CD4	(4) Anti-viral Drugs:
DNA	(3) Causes of Cancer:
DNA	(2) Cell cycle and anti-cancer drugs:
DNA	(1) The Replication of Viruses:
DNA Polymerase	B. Nucleoside Analogs as Anti-Tumor, Anti-Viral Agents:



When you compile the composition project to an RTF file, there is an option to include index terms. If it is checked, the compiled RTF file will include an index field after the word "Index" at the end of the document before the bibliography section. If you use Word 2003 or an earlier version, you can click Ctrl+A and press the F9 button to update the index list. If you use Word 2007, after clicking Ctrl+A and pressing F9, you have to click the right mouse button on the field and select "Toggle Field Codes".

*Extra step for Word 2007 users*

In the compiled document, if the associated note of an index term is a long note and covers more than one page, the start page and end page will be listed accordingly. For example: "Pollution, 4-5". If you don't like the style of the index, you can customize it by clicking the right mouse button in Word, and selecting "Edit Field...". Click the button "Index...". You can then change the settings to reformat your index list.



### Build a suggested reading list

When writing a book, you may need to provide a suggested reading list. The bibliography section lists all the references that are cited in your writing. The suggested reading list includes other source material you want your readers to know. In the Bibloscape composition module, you can build this list with drag and drop. Go to the "References" tab on the right, select the references you want, and drag and drop them to the suggested reading list.

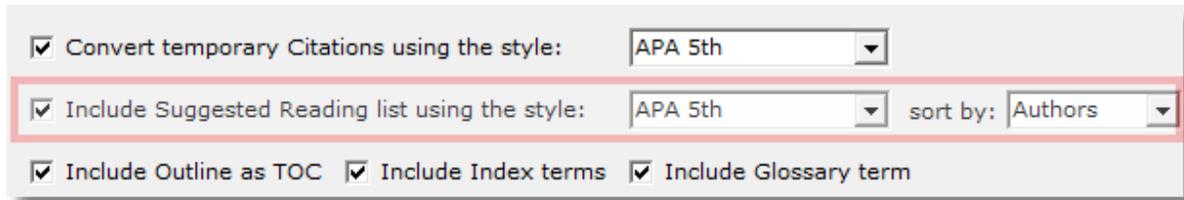
Created: 5/19/2008 ChenPaul  
Modified: 4/11/2009 Trial User  
Note Type: Book Section  
ID: Folder: 89 : Nucleoside analogs

The goal of this research is to develop two series of novel nucleoside analogs as potential anti-tumor and anti-viral agents. All synthesized compounds were screened for cytotoxicity using the SV-28 tumor cell line and their anti-viral activity was tested against HIV-1 and herpes simplex virus-1 by plaque reduction assays.

The first series of compounds are thymidine analogs containing a hydroxyalkylammonium (or amino) group either at the 5' position or at a corresponding position in the acyclic thymidine analogs. In

When you compile your composition project, there is an option to include the suggested reading

list. You can chose the style to use for the suggested reading list and its sort order.



The screenshot shows a settings panel with three rows of options. The first row has a checked checkbox, the text "Convert temporary Citations using the style:", a dropdown menu with "APA 5th" selected, and a small downward arrow. The second row has a checked checkbox, the text "Include Suggested Reading list using the style:", a dropdown menu with "APA 5th" selected, the text "sort by:", and a dropdown menu with "Authors" selected. The third row has three checked checkboxes followed by the text "Include Outline as TOC", "Include Index terms", and "Include Glossary term". A red rectangular box highlights the second row.

If you need to create a separate suggested reading list for each chapter, you can add chapter names using the button "New Chapter", or you can click the button "Get Chapters from Outline". Then, select the references from the suggested reading list and click the button "Assign Chapter to Selected References". Now when you compile the composition project, references in the suggested reading list will be displayed under each chapter heading.

### [Build a glossary](#)

A glossary list is included at the end of a book or thesis. It shows a list of terms and their definitions. If you want to build a glossary list, you need to first go to a categories folder and create a list of categories, then add the definitions to the "Definition" field. Once you have the list prepared, go to the composition project and select the "Glossary" tab. On the right, go to the "Categories" tab. Select the correct categories folder on the top to display the list of categories you have prepared. Select the category items and drag and drop them to the glossary list. When you compile the composition project and chose to include a glossary list, the term and its definition will be listed at the end of the compiled document.

The screenshot displays the Bibloscope 8 interface with the following components:

- Navigation Tabs:** Outline, Chart, Citation, Suggested Reading, Index, Glossary, Compile.
- Glossary Table:**

Glossary Term	Definition
Molecular Mecha...	The term molecular mechanics refers to the use of Newtonian mechanics to
Ab initio methods	Ab initio quantum chemistry methods are computational chemistry methods
Semi-empirical ...	Semi-empirical quantum chemistry methods are based on the Hartree-Fock
MMX	Force field developed by Norman Allinger group at UGA.
Amber	Force field developed by Peter Kollman group at UCSF.
- Category List:**
  - Computationa
  - Molecular Mechanics
    - MMX
    - Amber
    - Ab initio methods
    - Semi-empirical meth
- Inspector Panel:** Links, Notes, References, Categories, Draft.
- Metadata:** Created: 5/19/2008 ChenPaul; Modified: 4/11/2009 Trial User; Note Type: Book Section; ID: Folder: 89 : Nucleoside analogs.
- Main Text:**

The goal of this research is to develop two series of novel nucleoside analogs as potential anti-tumor and anti-viral agents. All synthesized compounds were screened for cytotoxicity using the SV-28 tumor cell line and their anti-viral activity was tested against HIV-1 and herpes simplex virus-1 by plaque reduction assays.

The first series of compounds are thymidine analogs containing a hydroxyalkylammonium (or amino) group either at the 5' position or at a corresponding position in the acyclic thymidine analogs. In

### 6.3.4 Compile your writing

You have now created an outline, filled the outline items with content, built a suggested reading list, index, and a glossary. Now it is time to generate the final draft. Go to the "Compile" tab at the top. The settings under the "Compile" tab can be saved as a file. You can load a different settings file using the combo box. To save the current settings as a new file, click the button "Save Settings As...". When you are ready to generate the final draft, click the "Compile to RTF" button to generate the draft in RTF format which can be opened by any word processor.

Compile to RTF    Suggested Reading    Compile

RTF    RTM    Setting: Book    Save the customized settings as a file

Convert temporary Citations using the style: APA 5th

Include Suggested Reading list using the style: APA 5th    sort by: Authors

Include Outline as TOC     Include Index terms     Include Glossary term

Use the following defined format except for notes marked with "Preserve Formatting"

Arial    11    Single    Bullets

The Bibloscape product family is designed to help researchers collect and manage bibliographic data and notes, as well as generate citations and bibliographies for publication.

- References module: Import and manage reference collections.

Notes to be compiled

All notes in outline     Included for export     Excluded for export     Selected in outline

Notes fields to be included in the compiled draft

	First level notes	Second level notes	Other parent notes	Child notes
Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Abstract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Misc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Metadata	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notes Title alignment and font

Title Align	Center	Center	Center	Left
Title Font	Set Font	Set Font	Set Font	Set Font
	First Level	Second Lev	Parent Note	Child Note

- Convert temporary citations using the style: Check this box to let Bibloscape convert the temporary citations to formatted citations and generate a bibliography according to the output style selected.

- Include suggested reading list using the style: Generate a suggested reading list according to the selected output style. Pick a sort order of the suggested reading list.
- Include Outline as TOC: You can let Biblioscape create a Table of Contents (TOC) based on the outline. After the compiled RTF file is opened by Word, press Ctrl+A to select all, and press F9 to update the fields. If you have Word 2007, the generated TOC is displayed as field code by default. You need to click the right mouse button and select "Toggle Field Codes".
- Include Index terms: Create an index at the end based on the keywords field of the notes included in the outline. After the compiled RTF file is opened by Word, press Ctrl+A to select all, and press F9 to update the fields. If you have Word 2007, the generated Index is displayed as field code by default. You need to click the right mouse button and select "Toggle Field Codes".
- Include Glossary term: Let Biblioscape create a glossary using the categories added to the Glossary tab.
- Use the following defined format except for notes marked with "Preserve Formatting": Check this box to make Biblioscape use pre-defined text format settings for each note included in the outline so that the generated draft will have a consistent text format. For example, if note A is formatted in font "Verdana" and note B is formatted in font "Tahoma", they will all be changed to the selected font in the generated draft. If you want to preserve the formatting of some notes in your outline, you can select a note and go to the "Inspector" tab and check the box "Keep Format". During compilation, Biblioscape will not apply the defined format setting to that note.
- Notes to be compiled: You can chose to compile only part of the notes included in the outline. By default, all notes will be included for compilation. If you want to exclude a note from compilation, select the note and go to the "Inspector" tab. Check the box "Exclude Export". You can also chose to compile only the currently selected notes in the outline.
- Notes fields to be included in the compiled draft: Biblioscape treats notes included in the outline differently according to its position in the outline. There are 4 types of notes in this scheme: First level notes, second level notes, Other parent notes, and Child notes. These are the 4 columns. You can select which fields to include for each type of notes. The fields you can include are: Title (a note's Title), Note (the note content), Abstract (a note's abstract field), Misc (a note's Misc field), Metadata (a note's fields including: Created by, Date created, Modified by, Date modified, Folder, Note type, Categories, Keywords, URL, Attachment, Mark, Status, etc.), and Link (all the links associated with a note). Among these fields, Title and Note are the most important ones. The other fields can be useful when you

produce a report. Besides what data fields to include for the 4 types of notes, you can also specify how its title will be formatted. You can set its font and alignment properties.



# Organizing information with categories

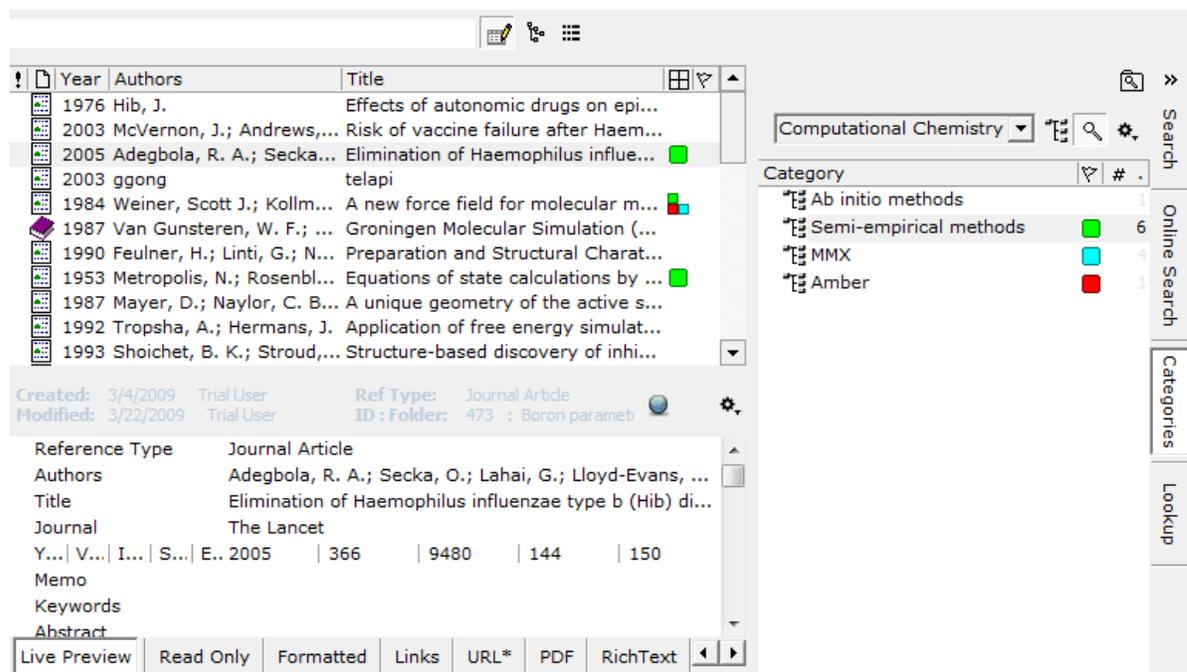
"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



## 7 Organizing information with categories

The Biblioscape categories module is designed to do two things. First, it can be used to tag references, notes, tasks, and charts. Tagging is very easy to understand. It is the equivalent of writing a keyword on a sticker and putting the sticker on your belongings. We have all done this when moving. The second use of the categories module is to build topic maps. This is a new concept to most users. It is only valuable to a small number of users who want to do knowledge management in Biblioscape. We will talk about this part in another chapter.



According to the definition at wikipedia, "A tag is a non-hierarchical keyword or term assigned to a piece of information. This kind of metadata helps describe an item and allows it to be found again by browsing or search." In Biblioscape, the "piece of information" could be a reference, note, task, or chart. The "keyword or term" is represented by categories that is shown on the search pane. The easiest way to assign it is to drag selected records (could be references, notes, etc.) to a category on the right.

Tagging became popular in web 2.0 sites like del.icio.us and Flickr. Del.icio.us allows users to associate tags with a bookmark as a way to classify your bookmarks. As this became popular, desktop programs like FireFox also let users add tags to a bookmark. At the Flickr site, users can add tags to the photos you upload. This helps users to find their photos by searching and browsing. The implementation of tagging in Biblioscape inherited the ease of use from the earlier systems, and it also added extra features to make it more flexible.

- Controlled vocabulary: When used in a multi-user environment, a list of categories are

placed in a folder by the administrator. Users can use the controlled vocabulary to tag records.

- Taxonomy: Biblioscape allows users to organize categories in a tree structure. The parent child relationship can be used to build both scientific taxonomies and folk taxonomies.
- Colored category: Users can assign a color to a category. All the records tagged by that category will also be marked by the same color.
- Flexible searching: With a parent child relationship, users can click a parent category and choose to retrieve all records tagged by the parent plus child categories.

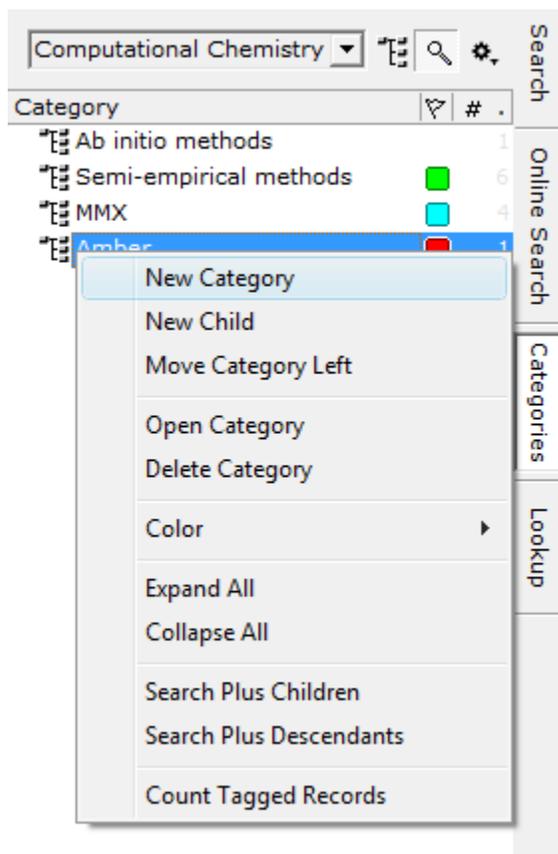
## 7.1 Add categories

### Add categories with Quick Add



This is the fast way to add new categories. Click a categories folder and turn on the Quick Add feature by clicking the Quick Add button. Start typing a category, and press the Enter key. The category will be added to the list. You can keep typing a category and pressing the Enter key to continuously add new categories. After you are finished adding all the categories, you can reorder the categories by clicking the Up (Ctrl+Up) and Down (Ctrl+Down) buttons. You can build a parent child relationship by dragging and dropping selected categories into another category.

### Add a category in the Categories tab



You can add categories directly in the Categories tab. If you have only a few extra categories to add, this can be a convenient way to do so. If you have lots of categories to add, using Quick Add will be much faster. In the Categories tab, click the right mouse button and select "New Category". Type the new category name and press the Enter key. If you want to add a child category for the currently selected category, select "New Child".

You can reorder the categories by holding down the Ctrl key and dragging and dropping selected category to its new position. You can drag and drop selected categories to another position to create a parent child relationship. To promote a category to a higher level, click the right mouse button and select "Move Category Left".

### Add a category in a separate Window

To add a category in its own window, click the "New Category" button. First type the category name. In this window, you can add more information about the category. In the Definition box, you can add a short description. If the category has other names, you can add them in the "Other names" list. The URI field can be used to identify a resource on the Internet. If you just want to use a category for tagging, just entering the category name will be enough. All the other fields are for building topic maps in the categories module, which will be covered in another chapter.

The screenshot shows a software interface with two main sections. The top section is a table with columns: Category, Category Type, Created By, Date Created, and a set of icons. The bottom section is a form for editing a category, with fields for Category, Type, Definition, Other names, and URI.

Category	Category Type	Created By	Date Created	Icons
AdoHcy		ChenPaul	5/12/2008	
AIDS		ChenPaul	5/12/2008	
Ara-C		ChenPaul	5/12/2008	
AZT		ChenPaul	5/12/2008	
BVDU		ChenPaul	5/12/2008	
DHPA		ChenPaul	5/12/2008	
DMF		ChenPaul	5/12/2008	
DNA		ChenPaul	5/12/2008	
dTTP		ChenPaul	5/12/2008	
FT-18-OMe		ChenPaul	5/12/2008	

**Category:** AZT **Type:** [Dropdown]

**Definition:** 3'-Azido-2',3'-dideoxythymidine

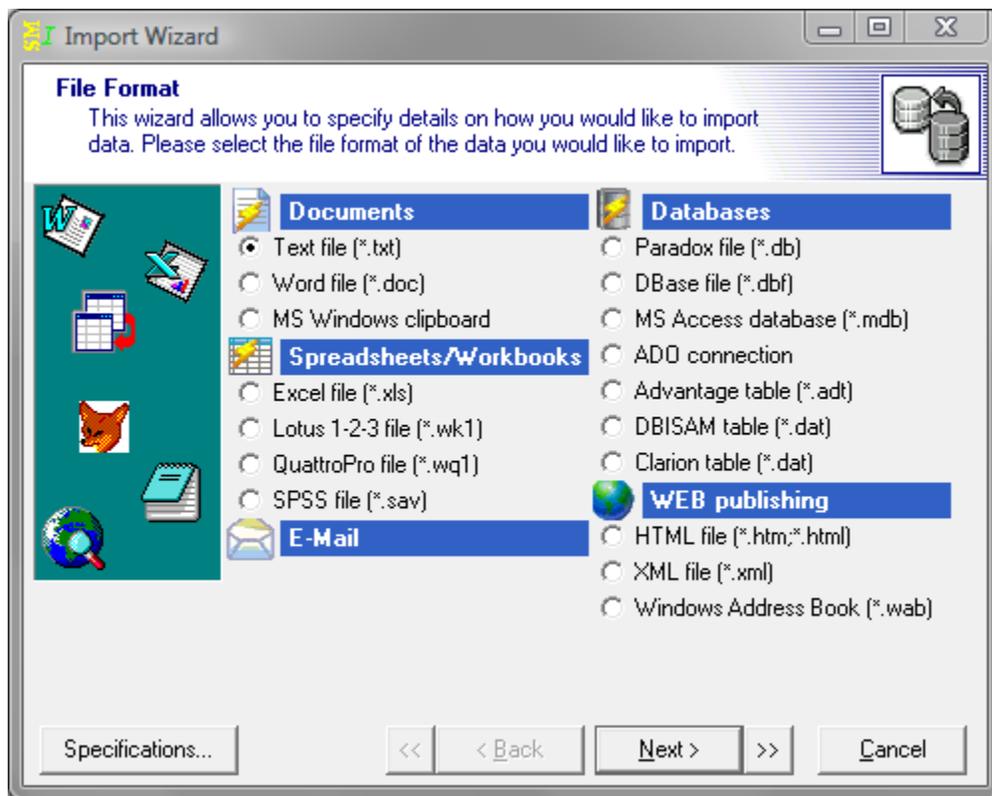
**Other names:**

Name	Scope

**URI:** [Text Field]

### Import categories

If you already have a term list, you can import the file into a Biblioscape categories module. Go to "File | Import...". Click the "Browse..." button to select the file you want to import. Click the "Start" button to run the import wizard. You can choose to import a document, spreadsheet, or a database. Many formats are supported. Just follow the wizard step by step.

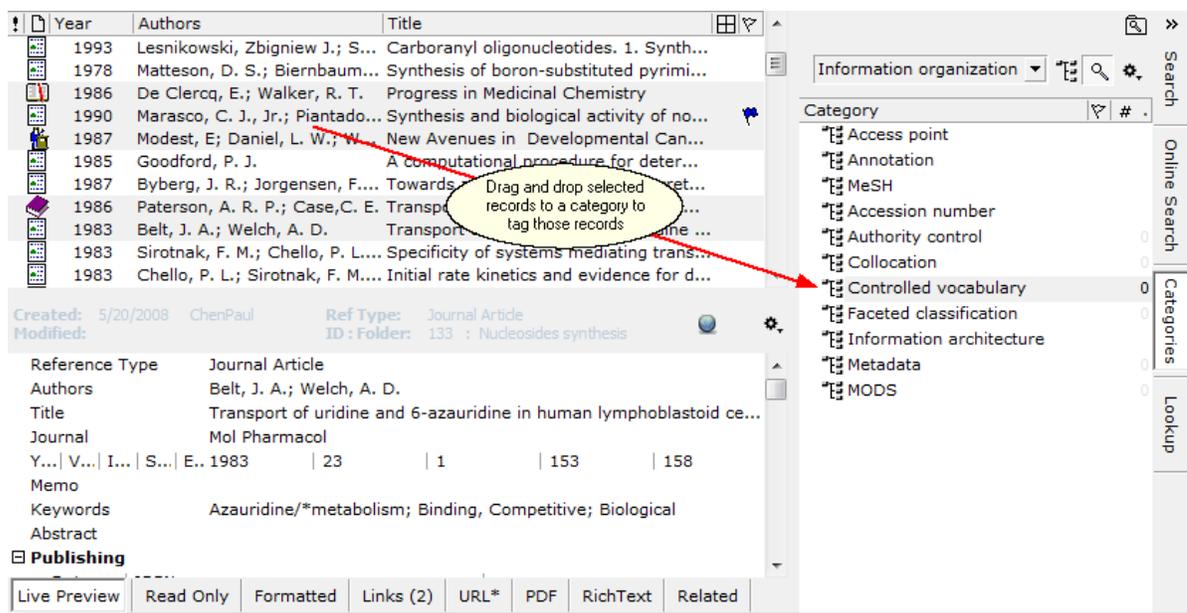


## 7.2 Tag records with categories

Once you have added the categories, they can be used to tag records including references, notes, tasks, and charts. The easiest way to tag records is by using drag and drop. For an individual record, you can display the categories tree on the right pane and tag the record by checking relevant categories. You can also type categories directly into the Categories field.

### Tag records by drag and drop

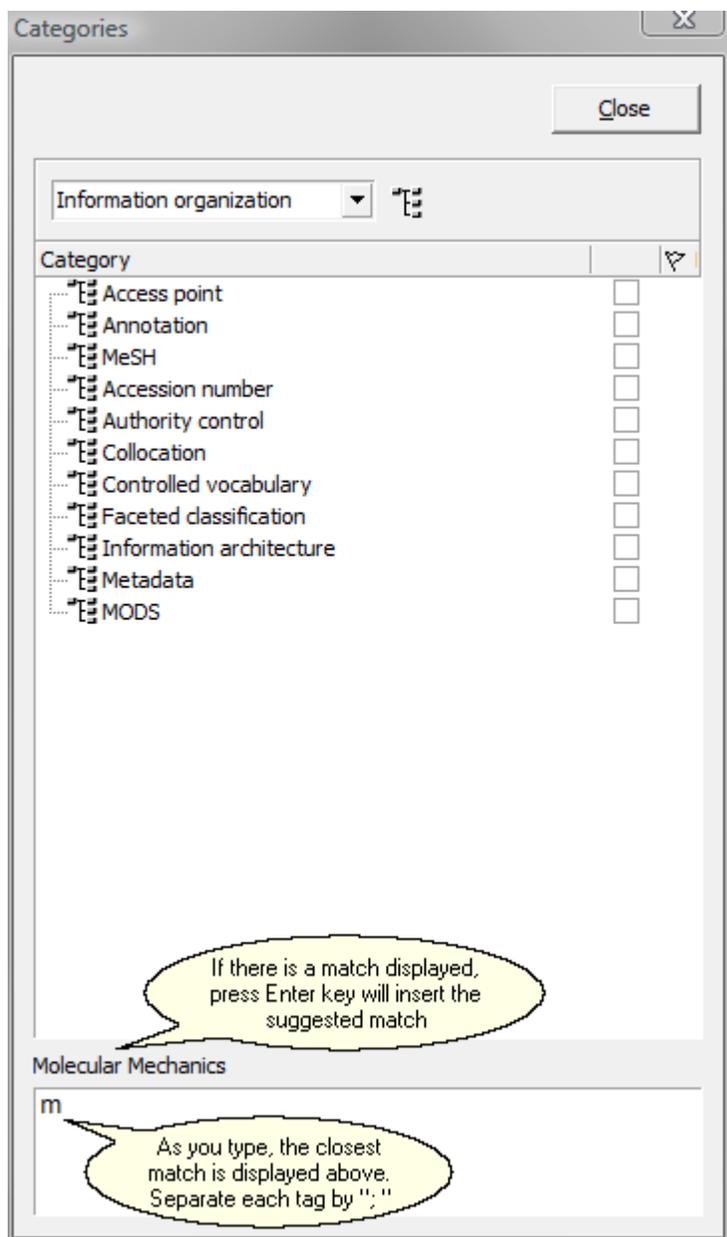
First, select the records you want to tag. Hold down the Ctrl key to select more than one record. On the right, click the "Categories" tab and open the categories folder that contains the categories you want to use. Then, drag and drop the selected records to a category item. If you want to tag those records by more than one category, you can drag and drop the selected records again to another category item.



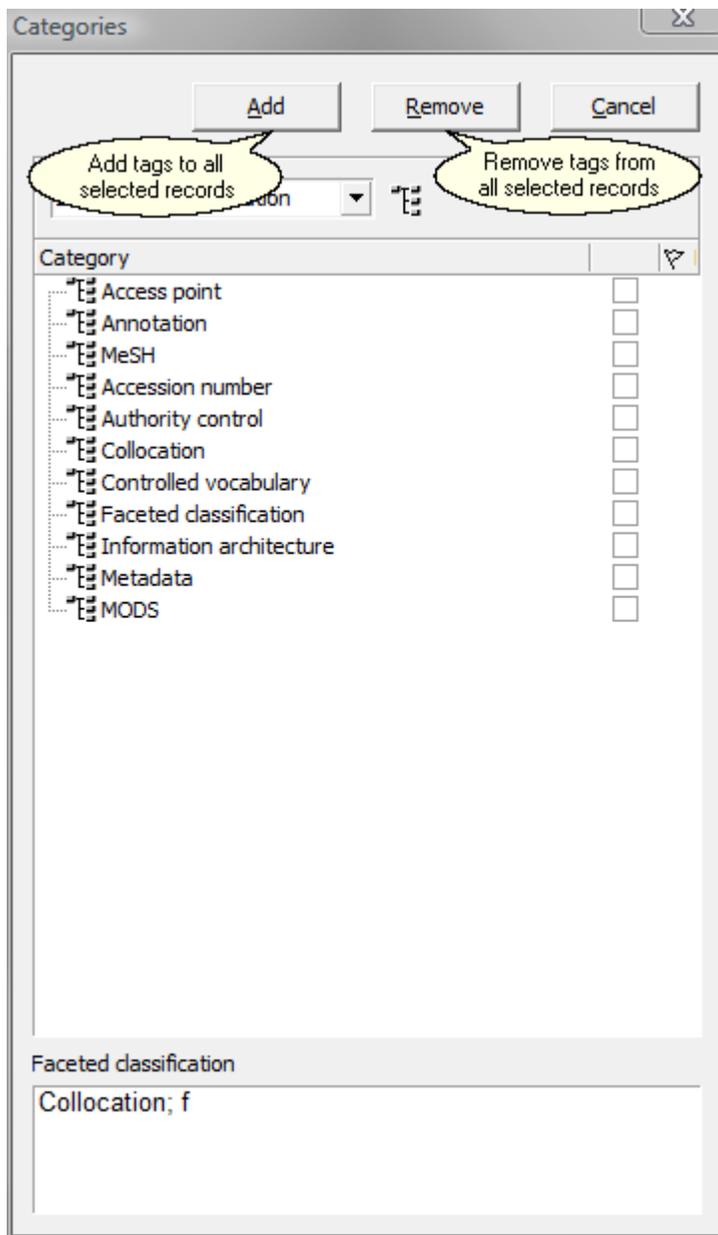
### Tag records by typing

If you are the kind of computer user who doesn't like to use the mouse and prefers using the keyboard instead, you can click the shortcut Ctrl+G to execute the menu command "Categorize..." when you are in the references, notes, tasks, or charts module. In the "Categories" Window, start typing the tags you want to use. As you type, Biblioscape will display the closest match above the categories box. Press the Enter key to add the suggested category as one of the tags. This will save some typing and assure a consistent set of tags are used. When there is no suggested category displayed, pressing the Enter key will close the Window.

The categorize window looks different when there is only one record selected vs when there are multiple records selected. When there is only one record selected, the categories box will display all the categories assigned to that record. When there are several records selected, the initial categories box will be blank. After adding new categories as tags, you can click the "Add" button to assign the tags to all the selected records. Or, you can click the "Remove" button to delete the tags from all the selected records.



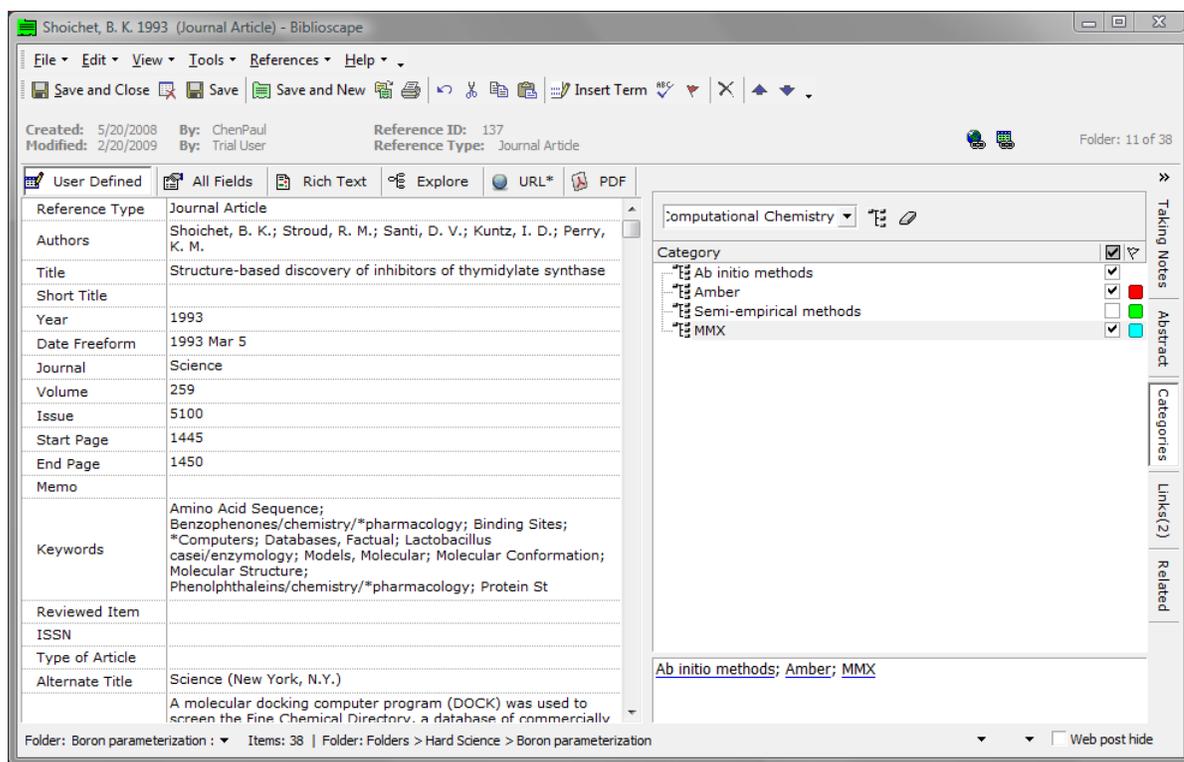
*Categorize a single record*



*Categorize multiple selected records*

### Tag a single record

When you open a reference, note, task, or chart record in its own window, you can click on the "Categories" tab on the right to see what categories the record has been assigned to. If a category has been assigned to the record, it will be checked in the check box column. You can check additional categories to tag the record. You can uncheck a category to remove it from the categories field of the record.



Users are allowed to enter a category into the categories field at the bottom directly. Individual categories should be separated by "; ". If you enter a category this way, the new category will be added to the "New categories" folder by default. If you don't want the directly added tags to be added to the "New Categories" folder, go to the "Tools | Options" window. Go the "Others" tab and check off the box "Automatically add categories in the "New Categories" folder if they do not exist in the current database".

### 7.3 Organize with taxonomy

If you still remember the way a high school science project report is written, you may be surprised how easy it was to manage the few citations used. You may have jotted it down on a piece of paper, and later typed it into a word processor. In college, you had more reference material to manage. If a reference manager is used, putting them into a few folders may be good enough. For a graduate student, a college professor, or a scientist, she or he may need to manage hundreds, even thousands of references. As your collection grows, putting them into a few project folders will prove to be inadequate. You need to divide your huge collection into meaningful subsets so you can quickly access them. If you share a database with other researchers, information classification becomes even more essential.

In Biblioscape, information objects (references, notes, etc.) are stored in folders in the project tree. You will soon discover that organizing by one dimension (project folders) is not enough. There are needs to classify information objects by other dimensions. For example, you have

collected hundreds of references for a research project about prostate cancer. Instead of having a single list of hundreds or even thousands of records, you may want to classify them into sub-groups based on different criteria. One list of categories may be about stages of the disease while another list may be about different treatments. When you read a reference, you may drag it into a different category. Sometimes, you may want to file one record into several categories so you can later retrieve what you want more easily. This is also true for notes. When you have collected hundreds of notes for your research project, you need to classify your notes in more than one way. We deploy our knowledge in specific situations, so tagging your records also needs to reflect this. Different situations require a different set of tags. In Biblioscape, you can organize your tags (categories) into folders or under different branches of the categories tree.

### [Use taxonomies to organize information](#)

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Taxonomy is a Greek word about the classification of various things. The word gives people an impression of classification in the scientific world, but actually, people practice this art in daily life. The historian Hayden White said, "The beginning of all understanding is classification". We use taxonomy to group related things together in all aspects of our life. The classification scheme can be very informal and ad hoc.

### **Relationship of terms in a taxonomy**

When you design a taxonomy to organize your information objects, you have to choose the terms carefully. Ambiguous terms should be avoided. Alternates and synonyms should not be entered as a separate term. Instead, you can put synonyms in the "Other names" list so when you use the synonym for searching, the correct hits can still be found. The most common relationship in a taxonomy is the parent child relationship. This relationship could mean many different things like "part of", "type of", etc. Biblioscape also allows you to add other types of relationships by using the link feature. You can click "Create Link", link one category to another one, and assign a relationship for your link.

### **Taxonomy and knowledge management**

Some people argue that the full text search in Biblioscape makes organizing records unnecessary. This argument assumes you know what search terms to use. People who have collected thousands of records may have this experience: you vaguely remember something that you have collected before. You try one search term and can't find it. You then try many more search terms but still cannot find the record you want. This is a very common experience for people with a large database. Our memory has limited power. If we don't categorize the things we collect, even with full text search, we still have trouble finding the things we want quickly. If you have built a taxonomy or even a simple term list and file your records into different categories, you can browse related categories to retrieve the records you want to find when you don't know what search words to use.

### Folksonomy vs taxonomy

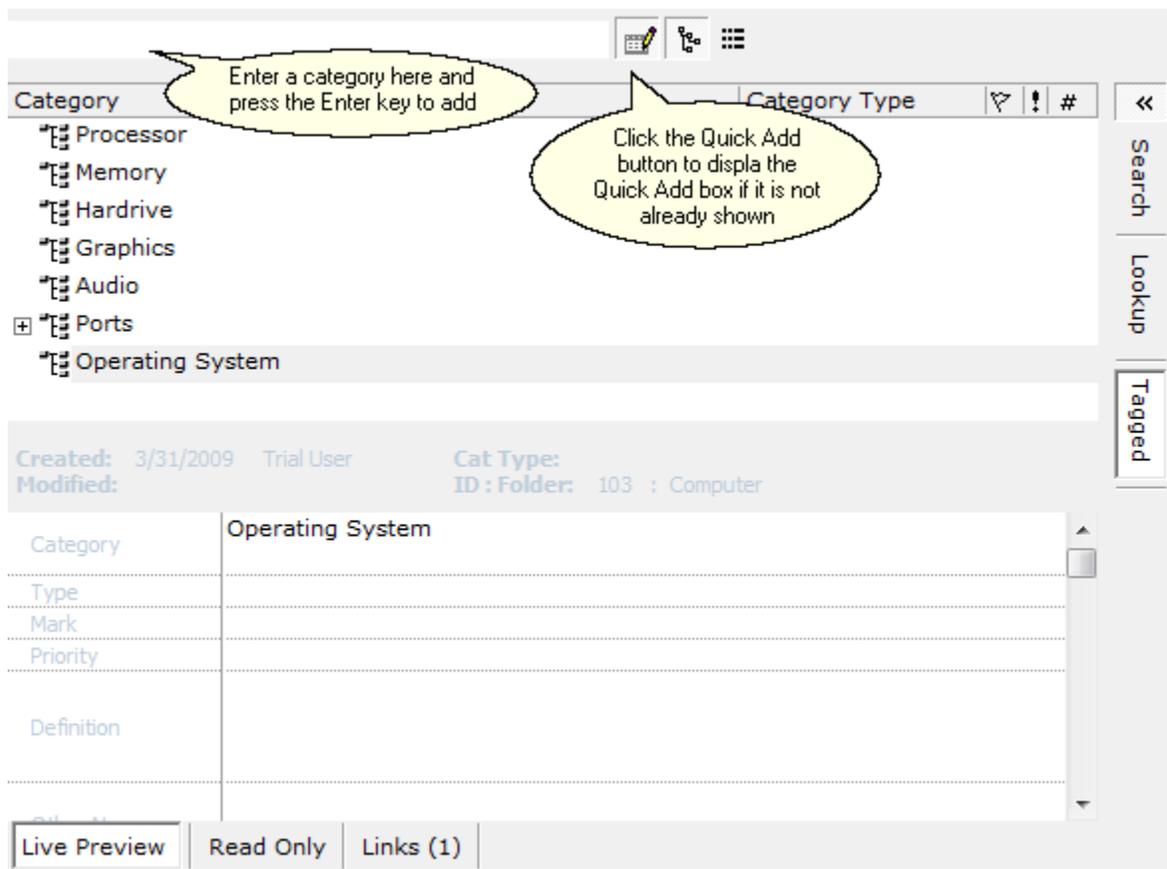
---

Folksonomy means that individual users are given the right to tag records using their own terms. Taxonomy is usually built by authority with carefully chosen terms. It reflects a top down approach. Folksonomy gives end users the freedom to tag records ad hoc. It represents a bottom up approach. In Biblioscape, both folksonomy and taxonomy can be used in a multi user environment. If you are the only user, the concept of folksonomy doesn't apply. In a multi user environment, each user can create a categories folder and store all his or her terms under this folder. This gives individual users the freedom to organize information objects in their own way. As more records are tagged, patterns may be formed. The administrator can summarize and extract from folksonomies to build a common set of taxonomy with a controlled vocabulary. If different terms are used for the same concept in folksonomies, they can be added to the "Other names" list. In this way, folksonomy and taxonomy will compliment each other.

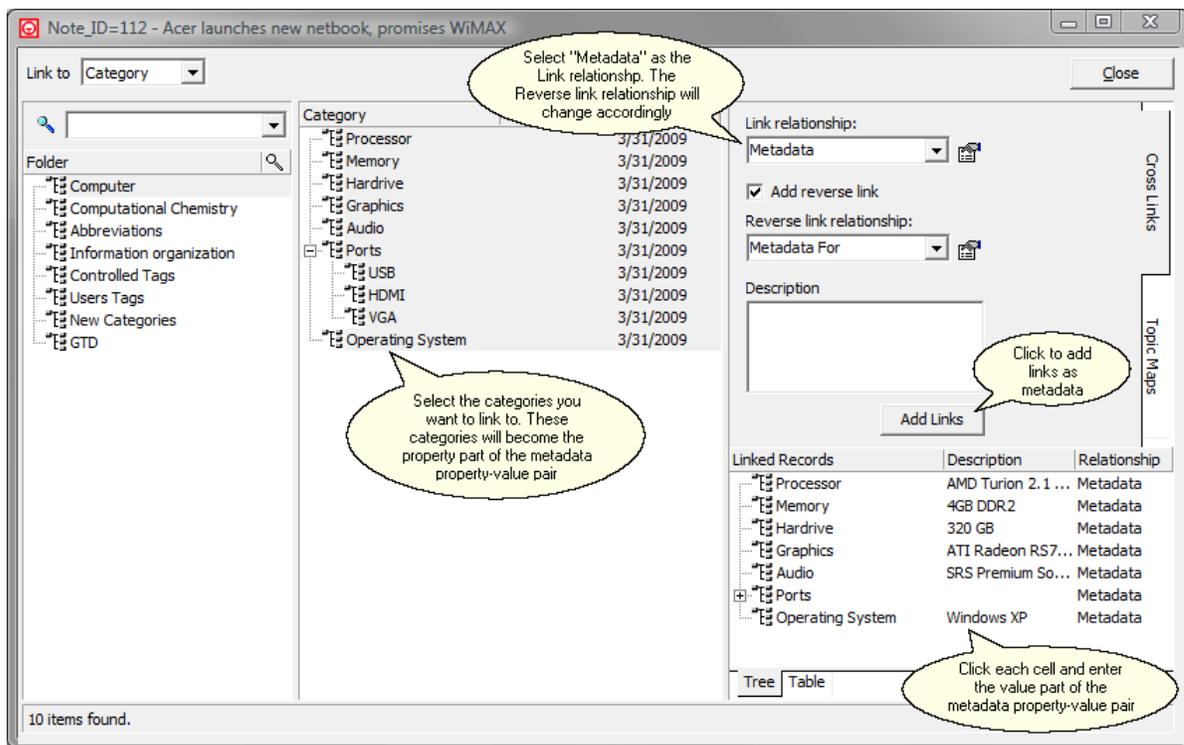
## 7.4 Assign categories as metadata

Categories can also be used to attach metadata to an information object (reference, note, task, chart). Metadata is data about other data. For example, if you have a note in the notes module about a laptop computer, you can have other data about the content of this note. When talking about laptop computers, people usually want to know its processor speed, memory, graphics, etc. You can have a list of such attributes about the computer that is not mentioned in your note. These property-value pairs can be linked to your note to form the metadata for that note.

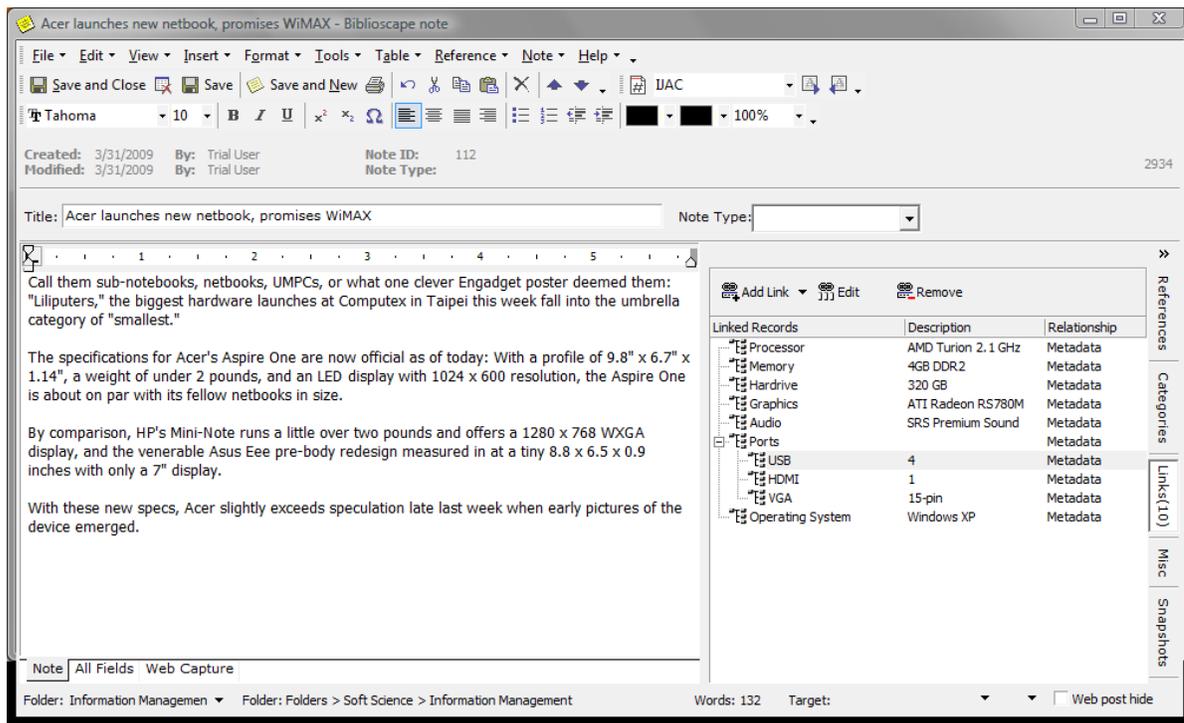
To assign metadata to an information object, the first step is to create a list of categories that will be used as the properties in the property-value pairs. Open a categories folder, use the category Quick Add box to enter "Processor", "Memory", etc. and press the Enter key after each word to add it as a new category item.



Open the note about laptop computers and click the menu command "Note | Add Links | Link to Category...". On the left panel, select the categories folder that contains the categories you want to link to. In the middle panel, select the categories you have added. These categories will become the property part of the property-value pair. On the right panel, select the "Cross Links" tab. Under "Link relationship", select "Metadata". If you don't want to add backward links, check off the box "Add reverse link". The reverse link relationship will change according to the selection of the link relationship. Leave the "Description" box blank. Now click the "Add Links" button. Once the links are added, click each cell under the Description column and enter the value part of the metadata property-value pair.



Click the "Close" button to go back to the note window. Select the "Links" on the right. You can see all the added metadata pairs. If you need to edit any metadata value, you can click on the cell under the "Description" column to edit.







# Planning tasks

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



## 8 Planning tasks

Biblioscape provides an integrated tasks manager. You don't need to switch to another application to manage your tasks. All research related information can stay in one place. You can even link a task to other records in your database.

You can use the Tasks module to track your research related ToDo list. If you need to put large amounts of information for a task, you should use the "Description" field which can take up to 256 MB of data. The progress of a task can be recorded in the "% Complete" field. You can use the drop down box to select a percentage number, or enter any percentage manually. Click the check box labeled "Complete" once a task is complete.

### 8.1 Create a task

It is recommended that you keep all your tasks in a single folder so that you don't have to go to several folders just to see your tasks. If you do need to keep tasks in more than one folder, you can still view all your tasks by going to the menu command "Tasks | Retrieve All" or pressing Ctrl+R.

#### **Create a task**

1. Click the menu command "Tasks | New Task".
2. Enter the task title at the top. Enter other data if needed, like "Start Date", "Due Date", etc.

#### **Create a task with Quick Add**

For most research tasks, it is just a simple to-do list. There is no need to use the task editor to add a new task. You can click the Quick Add button at the top, type a new task name, and press Enter.

The screenshot shows a task management application. At the top, there is a toolbar with icons for adding, deleting, and editing tasks. Below the toolbar is a list of tasks. The task "Second in vitro test for compound zx3243" is selected and highlighted in blue. Two callout boxes provide instructions: "First, click the Quick Add button to display the edit box" (pointing to the toolbar) and "Second, type a new task in the edit box and press the Enter key to add it" (pointing to the task list). Below the list, there is a summary bar with fields for "Created", "Modified", "Task Type", and "ID". The "Task" field is set to "Second in vitro test for compound zx3243". Below the summary bar is a detailed view of the task, including fields for "Task Type", "Task Mark", "Priority" (set to "Low"), "Description", "Categories", "Start Date" (4/14/2007), "Due Date" (5/10/2007), and "Progress" (set to "Complete"). At the bottom, there are buttons for "Live Preview", "Read Only", and "Links".

Task	Date	Priority	Mark
...ap solvent from the stock room	4/25/2007		<input checked="" type="checkbox"/>
Clean up leaked mercury	4/3/2007		<input type="checkbox"/>
Second in vitro test for compound zx3243	5/10/2007	Low	<input type="checkbox"/>
Read these references before Saturday			<input type="checkbox"/>
Computer More zx3243 needs to be synthesized			<input checked="" type="checkbox"/>
Calls Ask Dr. Bastow to grow cells	4/16/2007		<input type="checkbox"/>
Mail sample to lab in Duke			<input type="checkbox"/>

Created: 4/14/2007 ChenPaul  
Modified: 2/28/2009 Trial User  
Task Type: ID: Folder: 3 : Lab tasks

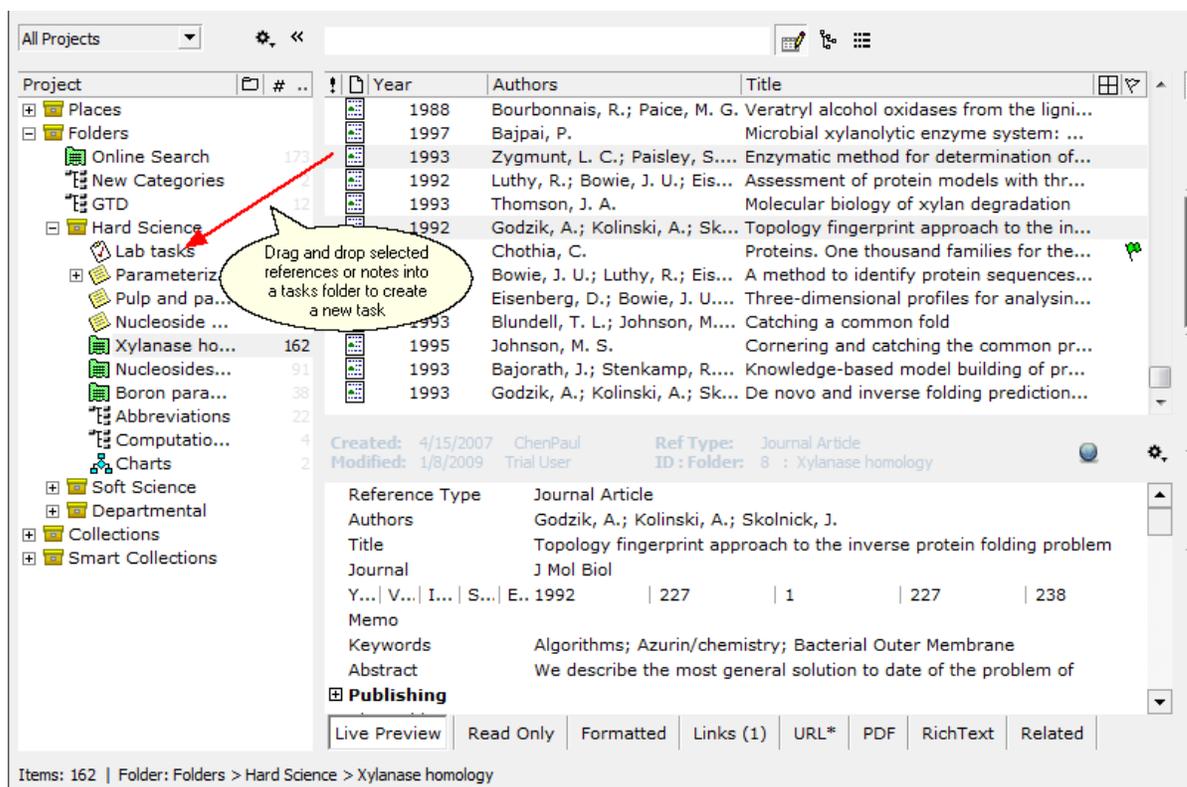
Task	Second in vitro test for compound zx3243
Task Type	
Task Mark	
Priority	Low
Description	
Categories	
Start Date	4/14/2007
Due Date	5/10/2007
Progress	<input type="checkbox"/>

Complete

Live Preview Read Only Links

### Create a task from selected references or notes

When browsing a references list or a notes list, you may want to create a task that is relevant to the selected references or notes. To do this, you can just drag the selected references or notes into a tasks folder. Bibloscope will automatically create a new task in that folder, and put the selected references or notes title into the Description field of the new task. You only need to enter a task title and press the "Save and Close" button.



### Edit a task

You can edit a task in the live preview pane. When you browse to another record, the changes will be saved automatically. Double clicking a task will open it in a separate task editor window. After changes are made, click the "Save and Close" button.

### Delete a task

1. Select the tasks you want to delete.
2. Click the menu command "Tasks | Delete".

Deleted tasks are put in the Recycle bin; you can recover deleted tasks by clicking the Restore button in the Recycle bin.

### Print tasks

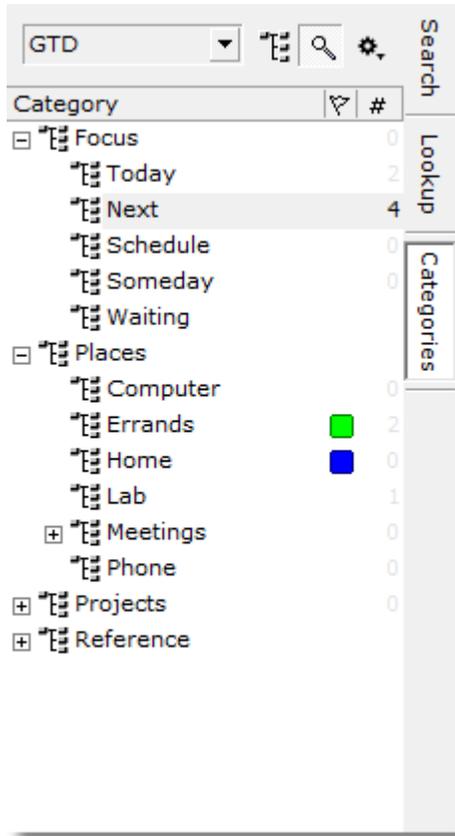
Click the menu command "File | Print". The current tasks list will be saved as an htm file and opened by your web browser. Go to the browser menu "File | Print" to print it.

## 8.2 Getting Things Done

Getting Things Done (GTD) is a book written by David Allen. It describes a method to increase your productivity by identifying actionable tasks, organizing them in context, and reviewing your tasks regularly. Biblioscape can help apply GTD principles in your research information management. If you have not heard of GTD before, it is highly recommended that you read David Allen's book. Since the book was first published in 2001, GTD has received a cult-like following in

business world. There has been software created solely for implementing the GTD method. There are also many integration solutions available for popular programs like Outlook and Mind Manager. Since Bibloscape users are mainly researchers, GTD is implemented in Bibloscape to meet their needs. You will like this implementation for its simplicity and flexibility, as well as its integration with the references and notes modules.

**Prerequisite**



To apply GTD in Bibloscape, you first need to create a categories folder named "GTD". You cannot use any other name because Bibloscape will open a tasks folder differently when "GTD" is selected in the categories tab. Under the "GTD" categories folder, add the following categories: Focus, Places, Projects, Areas, and People. Under the "Focus" category, add the following sub-categories: Today, Next, Scheduled, Someday. Under the "Places" category, add the following sub-categories: Computer, Errands, Home, Lab, Meetings, Phone. If you have to accomplish something that requires several steps, enter it under the "Projects" category. You can also divide your tasks into several areas. For Bibloscape users, these could be your research areas. Under the "People" category, you can enter your colleague's names, your professor's name, or anyone who might be involved in your research projects. When you design your GTD tags, keep in mind that they don't have to be mutually exclusive. A task can be dragged into several GTD tags.

**Collect**

The goal of GTD is to make you productive without much stress. The source of stress for most people is the feeling that you have not done what should be done. Some people never write their tasks down, and keep them all in their head. To remember all those tasks by itself could be a source of stress. Once the number of unfinished tasks accumulates, people will get a feeling of guilt and become stressed. So, the first thing is to get all the stuff you need to do out of your head. In Bibloscape, click on a tasks folder, enable Quick Add, and just start typing. After you finish writing down one task, press the Enter key and start typing the second one. When you enter tasks by Quick Add, don't worry about the start date, due date, priority, etc. Just dump all the things that need to be done into a tasks folder. After this, you will feel relief. Besides entering tasks by typing, you can also drag Bibloscape references or notes into a tasks folder to create a new task.

The screenshot shows the Bibloscape 8 interface. At the top, there is a toolbar with icons for adding, deleting, and editing tasks. Below the toolbar is a list of tasks. The task "Second in vitro test for compound zx3243" is selected and highlighted in blue. A callout box points to the "Quick Add" button (a plus sign in a square) and says "First, click the Quick Add button to display the edit box". Another callout box points to the task text and says "Second, type a new task in the edit box and press the Enter key to add it".

Task	Due Date	Status
... solvent from the stock room	4/25/2007	<input checked="" type="checkbox"/>
Clean up leaked mercury	4/3/2007	<input type="checkbox"/>
Second in vitro test for compound zx3243	5/10/2007	<input checked="" type="checkbox"/>
Read these references before Saturday		<input type="checkbox"/>
Computer: More zx3243 needs to be synthesized		<input checked="" type="checkbox"/>
Calls: Ask Dr. Bastow to grow cells	4/16/2007	<input type="checkbox"/>
Mail sample to lab in Duke		<input type="checkbox"/>

Task Details:

Created: 4/14/2007 ChenPaul Task Type:  
 Modified: 2/28/2009 Trial User ID: Folder: 3 : Lab tasks

Task	Second in vitro test for compound zx3243
Task Type	
Task Mark	
Priority	Low
Description	
Categories	
Start Date	4/14/2007
Due Date	5/10/2007
Progress	<input type="checkbox"/>

Buttons: Live Preview, Read Only, Links

### Process

After dumping all your to-dos into a tasks folder, it is time to process them one by one from the top. There are two main types of to-dos: actionable and something that doesn't require action. Identifying actionable things is one of the key ideas in GTD. You cannot do a project, you can only do an action. When you see a task like "Do my taxes", you should translate it into something like "Buy TurboTax at Costco". The goal of this "Process" step is to identify what is actionable and separate them from the rest. For things that are actionable, if it is something that can be done in under 2 minutes, just do it and mark the task as Complete. If you can delegate the task to someone else, do it and drag the task into the "Waiting" category. For all the other actionable things, defer them. We will talk about how these should be done in the next section, "Organize". For all the non-actionable tasks, if it is something that cannot be done now, but could become actionable in the future, drag it to the "Someday" category. If it is an idea that can be used as a reference in the future, file it as a reference. We will discuss this later in detail.

### Organize

This step (Organize) and the last step (Process) are performed at the same time. The key of the

Process step is to go through each task and determine its action. After this important decision, you need to organize the task immediately. A successful GTD implementation depends on this step. This is also the step that sets GTD apart from other task management techniques. Traditional task management is driven by deadline and priority. GTD is driven by context. There are many aspects and levels of GTD context. They can be divided into the following main groups.

- **Focus:** A to-do is something you do at certain time, in certain place, about certain things. Focus is about time. Under Focus, there is: Today (all the things you want to do today), Next (all the actionable things that can be done next), Schedule (things that needs to be done on certain day or at a certain time), Someday (tasks that cannot be done now), Waiting (tasks that have been delegated to others)
- **Places:** This category is about locations. You do these tasks at a certain place. When you group tasks by places, you can easily find out what else can be done at the same place. A popular list includes Computer, Errands, Home, Lab, Meetings, and Phone. Under meetings, you can list several meetings you have to attend regularly like "group meetings", "seminars", etc.
- **Projects:** If you need to perform several tasks to accomplish a goal, you can group them under a project. Under the "Projects" category, first create a sub-category named "Completed". You can create a project category as needed and drag tasks into this project category. When you finish all the tasks under this project category, you can drag and drop them to the "Completed" category.

Actionable tasks and non-actionable tasks are organized differently. The above categories are designed to handle actionable tasks. For non-actionable tasks, it should be filed under the "Reference" category. Under the "Reference" category, you can create many sub-categories. This is your filing system. It should be simple and ideally organized in alphabetical order. When you see a non-actionable task, you can just drag and drop it to a filing category.

### **Review**

Now that you have processed your actions, and organized them based on focus, places, and projects, you need to review them at least once a day. For daily review, you should first review the "Today" list. Mark those you have done as Complete. Decide what to do with those you have not worked on. The next list to look at is the "Schedule" category. To practice GTD correctly, you need to do a weekly review. This includes emptying your head, going through the process, and organizing steps as described above.

### **Do**

Ideally, you should browse a few tasks lists several times a day. During the day, we have different moods and different energy levels. When you are in the mood for writing, you can click the "Computer" category, see all the tasks there, and pick the ones you want to do. When you are

tired of desktop work and want to drive somewhere, you can click the "Errands" category and do several things while you are on the road. Because GTD organizes tasks by context, you can have a clear view of what needs to be done in a certain context. A key point in GTD is to break down a big task into doable actions. Once you have an identifiable actions list in context, you are less likely to procrastinate.

## 8.3 Advanced GTD topics

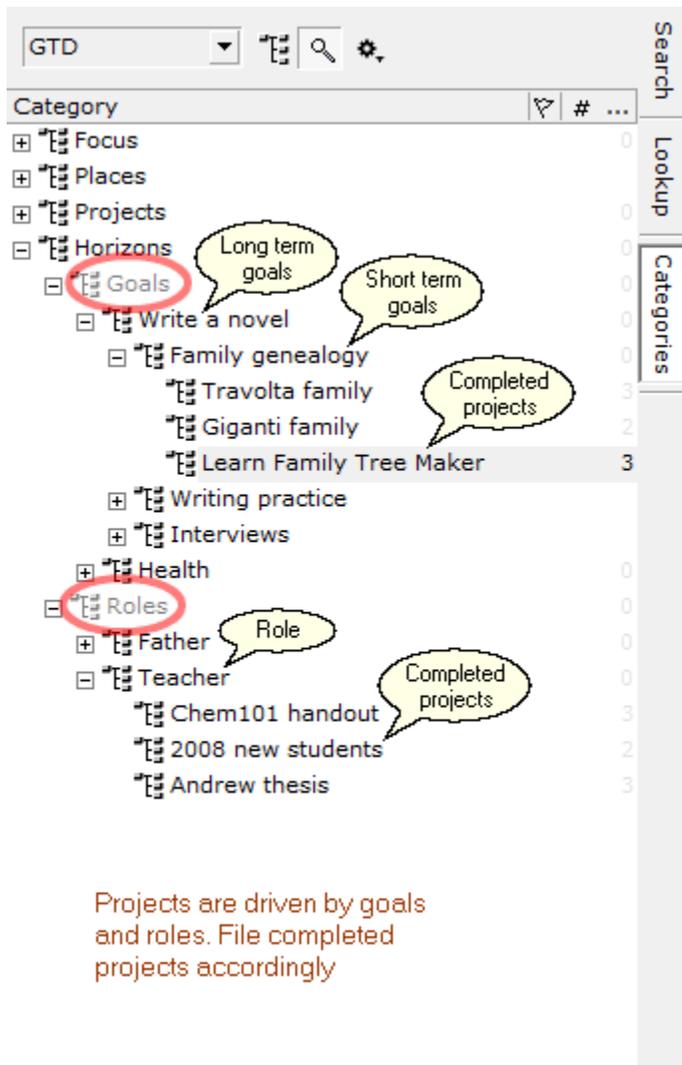
In the last section, we talked about the basics of Getting Things Done (GTD). As you start applying GTD in your task management, you may find cases that are not covered in the basic introduction. In this section, we will expand GTD usage, and introduce some new techniques.

### Horizons of focus

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In the GTD book, David Allen talked about 6 levels at which focus can be directed. He used the word "altitudes" as if watching your daily activities from an airplane.

1. 50,000 ft: Purpose and core values, lifetime goals.
2. 40,000 ft: Vision, long-term outcomes, 3-5 years goals.e
3. 30,000 ft: Things you have to do to achieve your visions, 2 year goals.
4. 20,000 ft: Areas of focus and responsibility.
5. 10,000 ft: Current projects.
6. Run way: Next actions.



For most people, we only manage tasks at level 5 and 6. It is a bottom-up approach. We can easily get lost in the details and ignore those really important things for the long term. If you want to have a top down vision, you can create a root category "Horizons" under the "GTD" folder. Under "Horizons", you can have two sub-categories: "Goals" and "Roles". In the horizons of focus list, levels 1, 2, and 3 are all about goals at different degrees. Level 4 is about your roles which include areas of focus and responsibility. There is no need to create categories for the last two levels because they are already covered by the "Projects" and "Next" category. You can then write down your lifetime goals as sub-categories under "Goals", write down your visions as sub-categories under these lifetime goals, and major steps you have to take to achieve those visions under the corresponding categories. Under "Roles", you can have several roles like "Father", "Husband", and your job role. The purpose of this list is to reflect the fact that your tasks and projects are both goal driven and role driven. Once you have finished a project, instead of dragging it to the "Completed" category, you can then drag and drop your finished projects into these categories. It can be used as a way to track what you have done to achieve those goals or fulfill the responsibilities of your roles. All this certainly adds extra work. If you don't like to spend the extra effort to track your projects for long term goals, you

can skip this section and concentrate at the managing tasks at projects level.

### [Integration with references and notes module](#)

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Because the data of different modules are all stored in a single database, integration between modules is made easy. You can create a task from the references or notes modules, and you can also file a task as a note. These can all be done with drag and drop.

#### **Create a task from the references or notes module**

When you are in the references module, you may want to check something about a reference. Instead of going to a tasks folder, creating a new task, and writing down which reference you want to double check, you can just drag the reference (or several references) and drop it to a task folder on the left. Biblioscape will create a new task automatically with the reference already added to the Detail field. You can just type something like "Check again in library" as the title and click the Save button. You can do the same thing when you are in the notes module; just drag a note (or several notes) to a tasks folder. Biblioscape will create a new task for you with the title of the selected notes added to the task's Detail field.

#### **File as tasks as notes**

Another important part of GTD we haven't mentioned is filing some of your non-actionable tasks as references. When you clear your mind by writing down everything in the Collect stage, you don't need to worry about whether the things you type are actionable or not. In the Process and Organize stages, you can drag some non-actionable things to the "Someday" category if it can become actionable in the future. You can drag the rest to a notes folder. Biblioscape will create a new note automatically and the note will have the same title as your task. If there is text in the task's Description and Miscellaneous fields, the text will be added to the note's body. The original task will be removed from the tasks module. The reason is that you don't want to keep non-actionable things in the tasks module. David Allen suggests to file all non-actionable things as references. The Notes module is the best place to store this freeform text.

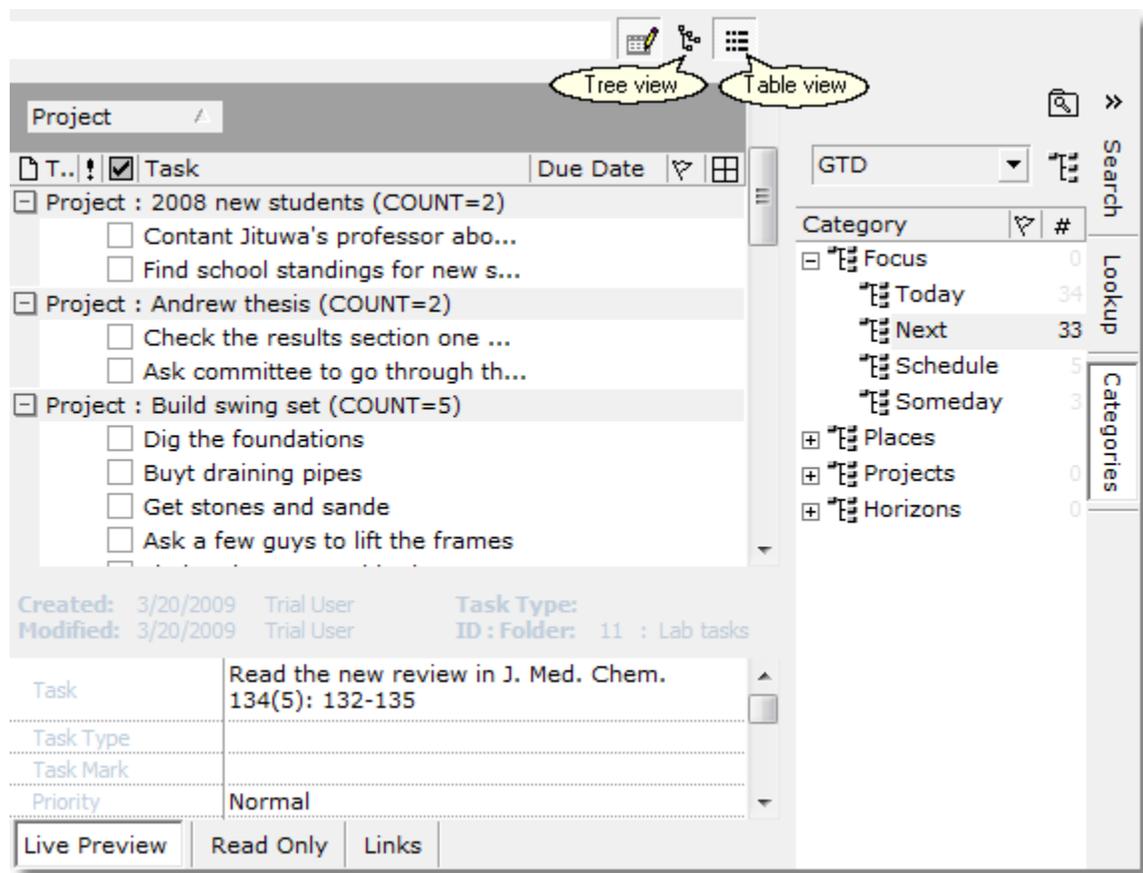
### [Organizing categories](#)

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So far we have introduced 3 top level categories to organize your tasks. These are: Focus, Places, and Projects. Although these can satisfy the needs of most people, but you are not limited to just these. For example, you may want to add another category called "People" and list several names under it. You can then file tasks under those names. There is no limit on the number of categories you can file a task to. Filing tasks to more categories certainly add extra work. Over time, you can find a good compromise between these two approaches.

### Project tasks ordering

For some projects, the order of doing each task is very important. For example, when building a pond, you must prepare the foundation before laying the first brick. Bibloscope provides two views of your tasks. In the tree view, you can re-arrange the order of your tasks by click the Up (Ctrl+Up) and Down (Ctrl+Down) button. Once you have set up the order in the tree view, the tasks will be displayed in the same order in the table view. For GTD users, clicking the Next category will list all next tasks in the table view grouped by project. If you have ordered tasks for a project, tasks will be displayed in the same order here. You can evaluate and identify the next actions and drag them to the Today category if needed.



## 8.4 Search tasks

### Fast search

Fast search is a full text indexed search. All text fields in a task table will be searched, and search words will be highlighted in the result.

1. Click the "Search" tab on the right pane.
2. Click the "Fast Search" tab on the search pane.

3. Enter the search string and press the Enter key.

#### **Advanced Search**

1. Click the "Search" tab on the right pane.
2. Click the "Advanced Search" tab on the search pane.
3. Click the grey text to add a search condition.
4. Click the table field in red to select the desired field to search against. Click the operator text to change the search operation.
5. Click the question mark to enter search text.
6. Click the green arrow button below to start the search.

#### **Retrieve all tasks**

To retrieve all tasks in your database, click menu command "Tasks | Retrieve All".

#### **Search by categories**

If you have files tasks tagged to a category, clicking on that category will retrieve all those tagged tasks. If you hold down the Ctrl key, you can click several categories. Biblioscape will display all the tasks tagged by the selected categories. If you hold down the Alt key first, then the Ctrl key, and start to select categories, only those tasks that are tagged with all the selected categories will be shown.

#### **Display completed tasks**

By default, only active tasks are displayed. To display both active and completed tasks, click the menu command "Tasks | Completed Tasks".

# Charting ideas

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



IX

## 9 Charting ideas

The Charts module is for expressing your ideas in a visual way. It can be used to draw flow charts, organization charts, etc. Each chart object can be linked to references, notes, tasks, and catalogs from other modules.

### 9.1 Create, edit, delete a chart

#### Create a chart

1. Click the menu command "Charts | New Chart".
2. Enter a chart title on the left pane first.
3. Click the menu command "Charts | Edit Chart" to draw the chart in the chart editor.

#### Delete a chart

1. Select the chart you want to delete.
2. Click the menu command "Charts | Delete".

#### Edit a chart

To edit a chart, click the menu command "Charts | Edit Chart". The chart object can be repositioned by using drag-and-drop. Double clicking a chart object will bring up the object's customizing form. You can change its color, background, font, text, image, etc. Chart objects can be connected by a line. Double clicking the line will bring up the connection customizing form allowing you to change the arrow style, size, link point, color, etc.

#### Display a chart

By default the chart is displayed in its original size. You can easily change the display size with menu commands or toolbar buttons.

- \* Zoom In: Click the menu command "Charts | Zoom In".
- \* Zoom Out: Click the menu command "Charts | Zoom Out".
- \* Fit: Click the menu command "Charts | Fit" to resize the chart to fit into the current window.
- \* Actual Size: Click the menu command "Charts | Actual Size" to display the chart in its original size.

#### Print a chart

To print a chart, click the menu command "File | Print Chart".

### 9.2 Link to records from other modules

#### Link a chart to records from other modules

You can link a chart to records from other modules. Go to menu command "Chart | Create Links" and select the desired module. The link window will be shown. Go to the folder and select the records you want to link to and click the "Add Links".

### Link a chart object to records from other modules

When drawing a flowchart, sometimes you may want to link a chart object to records from other modules. Select the chart object with your mouse, then go to menu command "Chart | Create Links" and select the desired module. The link window will be shown. Go to the folder and select the records you want to link to and click "Add Links". In future use, when you click on that specific chart object, the linked records will be shown. When no chart object is selected, all the linked records will be displayed.

## 9.3 Chart editor

When creating or editing a chart, you need to open a chart in a separate chart editor window. You can do that by going to menu command "Chart | Edit" or by clicking the "Edit Chart" button on the toolbar. The editor window is resizable. Once finished editing, click the OK button to save. Click the Cancel button to close without saving.

### Add memo text to a chart object

You can add rich text to an individual chart object. When in the charts list view, select an object in the chart preview pane. Go to the annotation pane below and type your comments, ideas, etc. If you click another chart object, the annotation will be saved automatically. When you are in the chart record window, there is an "Object" tab on the right pane. Select a chart object and start typing in the text box on the "Object" tab. When you click the same object next time, the saved annotation text will be displayed.

### 9.3.1 Chart editor main menu

The main menu of the editor window includes the following items:

#### File

- Open - Loads flow chart contents from a file. The file that stores flow chart contents may be a file saved earlier using the Save As menu item.
- Save As ... - Saves flow chart contents to a file. You can load data from this file into another flow chart control.

#### Edit

Use this menu to modify a selected item.

- Undo - Use this menu item to undo most recent changes to the flow chart.
- Copy - Copies selection to the clipboard.
- Cut - Cuts selection and places it onto the clipboard.
- Paste - Pastes clipboard contents to the flow chat.

- Select All - Selects all items within the flow chart.
- Clear Selection - Cancels any selection in a flow chart control.
- Bring To Front - Brings selected objects in front of other objects in the flow chart window. If you apply Bring To Front to a selected object, then that selected object overlaps other items on screen.
- Send To Back - Places selected objects behind other objects to the end of the Z-buffer.

#### View

- Zoom In - Enlarges a flow chart's view.
- Zoom Out - Lessens a flow chart's view.
- Fit - Changes a flow chart's zoom ratio in order to show all chart items within the flow chart window.
- Actual Size - Resets the zoom ratio of the flow chart window to 100% (no zoom).

#### Union

- New Union - Creates a new union. The selected object becomes the main object of the union. Double-click the main object to select all objects that belong to the union. This item is enabled only when several objects are selected.
- Add To Union - Adds selected object(s) to a union. If a selected object is already in the union, it is not added to it.
- Remove From Union - Removes an object from a union. This item is enabled only when a selected object is a member of a union. The Remove From Union item is disabled when the selected object is the main object in a union.
- Clear Union - Removes all objects from a union. This item is enabled only when a selected object is the main object in a union.
- Clear All Unions - Removes all objects from all existing unions.

### 9.3.2 Chart editor popup menu

The popup menu appears when clicking the right mouse button on an item within the flow chart editor. The popup menu contains a number of standard operations, such as Copy, Cut, Paste, and options, specific for flow chart items.

- Properties - Use Properties to edit flow chart item properties. If the selected item is a flow

chart object, the object customizing form activates. If the selected item is a connection, the connection customizing form activates.

- Undo - Use this item to undo the last changes to the flow chart.
- Copy - Copies selection to the clipboard.
- Cut - Cuts selection and places it into the clipboard.
- Paste - Pastes clipboard contents to the flow chart.
- Remove Point - Deletes the intermediate point of a connection. This item is enabled only when you click the right mouse button on the intermediate point.
- Select All - Selects all flow chart items in a flow chart.
- Clear Selection - Removes selection of all items within a flow chart.
- Bring To Front - Places an item in front of all other flow chart items.
- Send To Back - Places an item behind other flow chart items.

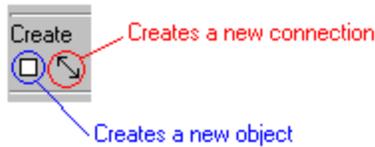
The popup menu of the flow chart editor has a union section. Its items are enabled only if the selected item is a flow chart object. Objects of the same union move together, even if a user moves only one object comprising it. Items of the union section perform the same actions as the Union item of the main menu.

- New Union - Creates a new union. The selected object becomes the main object of the union. Double-click the main object to select all objects that belong to the union. This item is enabled only when several objects are selected.
- Add To Union - Adds selected object(s) to a union. If a selected object is already in the union, it is not added.
- Remove From Union - Removes an object from a union. This item is enabled only when a selected object is a member of a union. The Remove From Union item is disabled when the selected object is the main object in a union.
- Clear Union - Removes all objects from a union. This item is enabled only when a selected object is the main object in a union.
- Clear All Unions - Removes all objects from all existing unions.

### 9.3.3 Chart editor toolbar

The flow chart editor includes a toolbar with the following sections:

#### Create Section



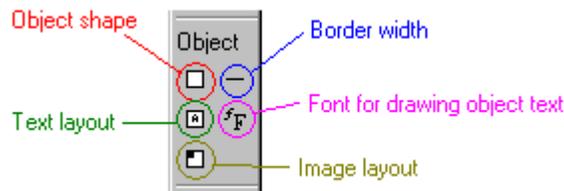
Use buttons from this section to create a new item within the flow chart.

In order to draw a new object or a connection:

- Click "Object" or "Connection" on the toolbar to create a new object or connection.
- Drag the mouse pointer diagonally in the direction you want.

The default background and foreground colors are displayed on the lower-left corner of the editor screen. Use the left mouse button to draw with the foreground color or the right mouse button to draw the background color.

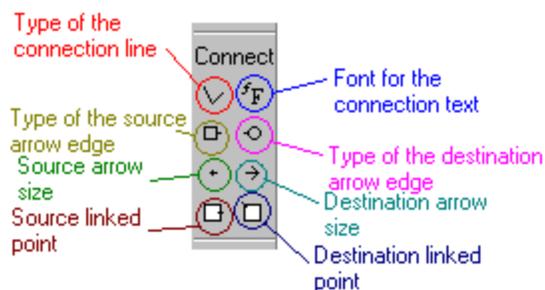
#### Object Section



Use buttons from this section to customize object formatting.

- To change object shape, use the "Shape Style" button.
- To change the border width of an object, first select the object, then use the "Shape Line Width" button.
- Use the "Text Font" button to change the font of object text.
- Use the "Text Layout" button to change text layout within the flow chart window.
- Use the "Image Layout" button to change image layout within the flow chart window.

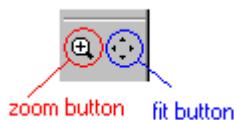
#### Connection Section



Use the buttons in this section to customize the look of a selected connection.

- Change the connection type by clicking the "Line Style" button (first left).
- Use the "Text Font" button to change the font used for connection text (first right).
- Use the "Source Arrow" (second left) and "Destination Arrow" (second right) buttons to specify the style of the source and destination edges of a connection.
- Use the "Source Arrow Size" (third left) and "Destination Arrow Size" (third right) buttons to change the size of source and destination arrows. Generally, a connection can have arrows with arbitrary size, but the drop down menu within the flow chart editor allows you only predefined sizes. Use the Properties popup menu item to change the arrow size of the connection.
- Use the "Linked Point of Source Object" (fourth left) and "Linked Point of Destination Object" (fourth right) buttons to specify to linked source and destination objects.

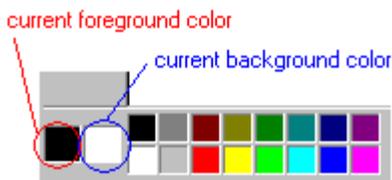
### Zoom Section



Use the buttons within this section to change the scale of the flow chart.

- Use the "Zoom" button to zoom a flow chart's view. First, toggle this button, then zoom in the flow chart view area. To zoom out, use the ALT key when zooming.
- Use the "Fit" button to fit a flow chart's contents to the flow chart window.

### Palette Section



Use this palette to change the color of a current object or connection.

Use the left mouse button to change the foreground color. Use the right mouse click to change the background. Double click the current foreground or background boxes in order to specify a color that differs from available palette colors.

To change the border color of an object, select it and then specify a new foreground. To fill an object with a particular color, first select the object and then specify a new background color.

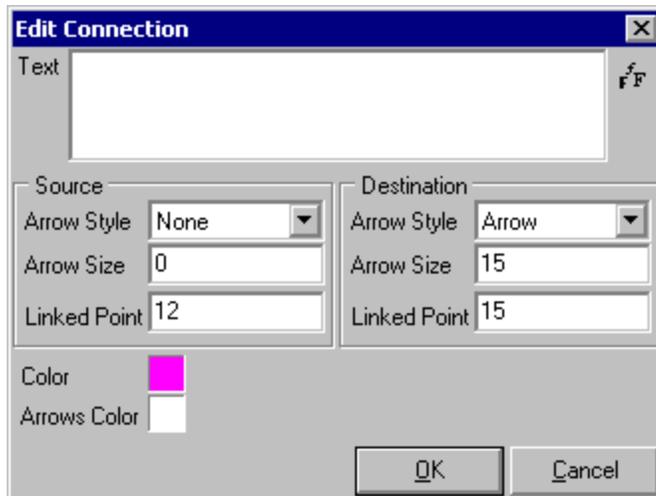
To change the color of a connection line, first select the connection, then specify a new foreground color. To specify the color of connection arrows, first select the connection then specify a new

background color.

Note: If there are no selected objects or connections within the editor, setting a new background color changes the flow chart's background color.

### 9.3.4 Connection customizing form

The connection customizing form provides a visual interface for connection properties.



#### Text

Enter connection text into this edit box. Use the "Text Font" button to change text font in the Text box

The Source and Destination sections determine the source and destination connection edges respectively.

Source section		Destination section	
Arrow Type	Type of source connection edge.	Arrow Type	Type of destination connection edge.
Arrow Size	Specifies size of source arrow edge. Use this property to define unique arrow sizes.	Arrow Size	Specifies size of destination arrow edge. Use this property to define unique arrow sizes.
Linked Point	Determines the linked point of a source object. Connection is linked to the source object at this point.	Linked Point	Determines the linked point of a destination object. Connection is linked to the destination source object at this point.

#### Color

This represents connection color. Double click the color box to activate a color selection dialog. Use

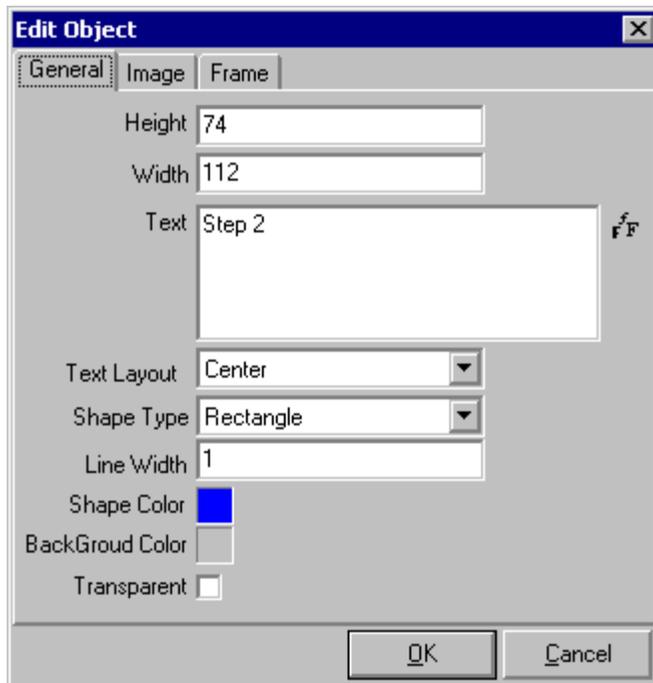
this color dialog to specify a new color for a connection.

### Arrow Color

Arrow color represents the color of arrows. Double click the color box in order to choose a new color from the color selection dialog.

## 9.3.5 Object customizing form

The object customizing form provides easy configuration of object properties. The object customizing form contains three pages:



### General Page

The general page contains edit controls for most object properties.

- Height - Specifies the vertical size of an object in flow chart coordinates.
- Width - Specifies the horizontal size of an object in flow chart coordinates.
- Text - Determines object text. Use the Generate/but\_chart\_obj\_TxFont.gif button to the right of the text edit box in order to change text font.
- Text Layout - Specifies text layout.
- Shape Type - Specifies object shape.
- Line Width - Determines border width of an object.
- Shape Color - Specifies border color. Double clicking the color box activates the color selection dialog.
- Background Color - Specifies the background color for an object.
- Transparent - Determines whether an object is transparent.

### Image Page

This page provides image selection for an object. Simply select an image from the window.

- Image Layout - Specifies image position within a flow chart object.
- Clear Image - Use the Clear Image button to remove a link between an image and object. After clicking the Clear Image button, an object has no associated image.

### Frame Page

The intent of this page is to configure the object frame. These settings are meaningful only for objects of type fcsRectangle. Options of this page are similar to parameters of the DrawEdge function (see Win32 API help).

#### Edge Style section

RaisedIn	Raised inner edge
RaisedOut	Raised outer edge
SunkenIn	Sunken outer edge
SunkenOut	Sunken inner edge

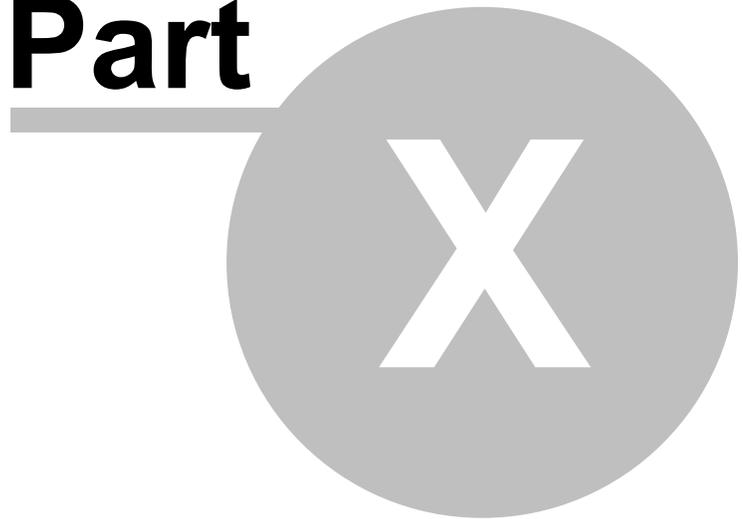
#### Frame Style section

Flat	Flat border of an object
Mono	Object has a one-dimensional rectangle border
Left	Left side of border rectangle
Top	Top of border rectangle
Right	Right side of border rectangle
Bottom	Bottom of border rectangle
Soft	Soft edges instead of tiles
Adjust	The border rectangle to be adjusted to leave space for client area
Middle	Interior of rectangle to be filled
Diagonal	Diagonal border

# Using topic maps with categories

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



## 10 Using topic maps with categories

The Biblioscape categories module is designed to organize your research information. There are two levels of organization. The first one is organization by tagging. We have already covered this in an earlier chapter. The second one is more complex and harder to understand. It is about linking a category item to other information objects which include categories, references, notes, etc. We call this "topic maps building".

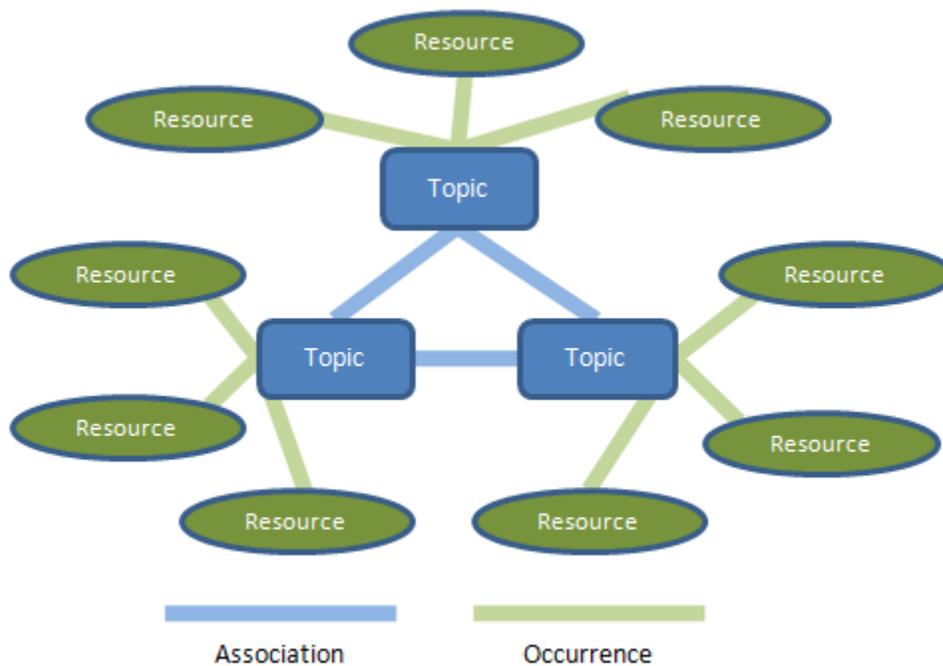
### 10.1 Topic map basics

Topic maps has its roots in back-of-the-book indexing. Each term in the back-of-the-book index points to a page in the book about that subject. Each term in a topic map points to other resources, plus a description about a link to the resource. In other words, there are 3 components in a topic map relationship. The extra relationship component makes it different from the back-of-the-book index or simple tagging with categories.

#### [Topics, associations, and occurrences](#)

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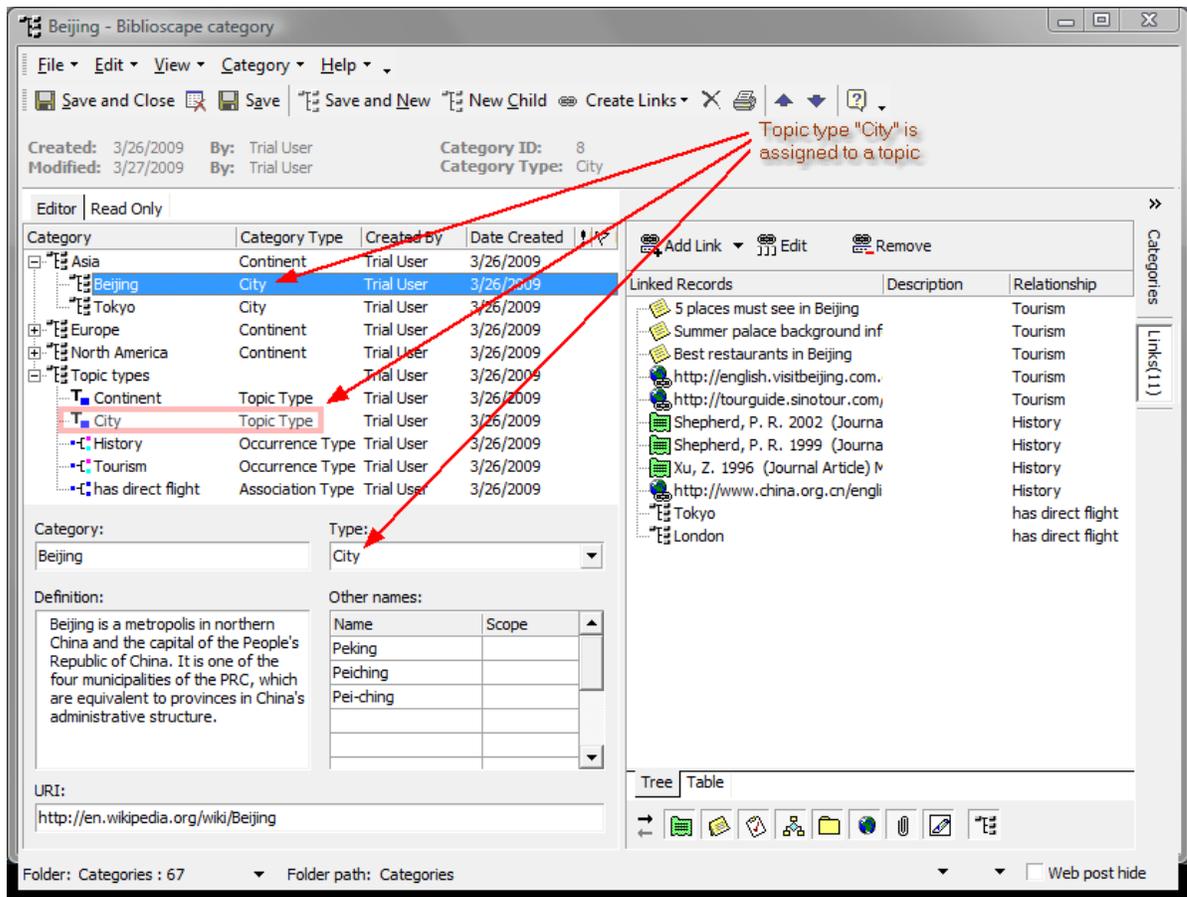
Topics are the main building blocks of topic maps. Topics can be used to represent many things. It could be a subject, a person, an idea, etc. Topics are connected to each other through associations. Associations represent the relationships between topics. In the back-of-the-book index analogy, an association is the cross reference between index terms. Besides linking to other topics, a topic in a topic map can also link to other information resources. Such resources are called occurrences of the topic. An occurrence could be many things. For example, if you have a topic about a drug like Aspirin, an occurrence could be a research paper published in a scientific journal, a note in your database about Aspirin, a Web page on the Internet, a picture file of the pill, etc.



In Biblioscape, topics, associations, and occurrences are all represented by categories in the categories module. When you link one category to another, and assign a third category as the line type, then the third category is considered an association. When you link a category to a reference or a note and assign another category as the link type, then this category is considered an occurrence.

### Topic types

Topics can be typed. There are no pre-defined sets of types. The typing is totally controlled by end users according to their needs. For example, if you plan to add many cities in different continents as topics, you can create a topic type called "Continent" and another one called "City". You can then assign one as a topic type for another topic. You can assign the topic type "City" to topics "Beijing" and "Tokyo". Remember, the topic type "City" itself is a topic. You can have an unlimited number of topic types.



Not only can you type topics, you can also type associations and occurrences. For example, you can create a category named "Tourism" and assign "Occurrence Type" as its type. Next time you link a category to other information objects like references, notes, etc., you can pick "Tourism" as the link relationship.

Category	Category Type	Created By	Date Created	!	🔍
[-] Asia	Continent	Trial User	3/26/2009		
[-] [-] Beijing	City	Trial User	3/26/2009		
[-] [-] Tokyo	City	Trial User	3/26/2009		
[+] Europe	Continent	Trial User	3/26/2009		
[+] North America	Continent	Trial User	3/26/2009		
[-] Topic types		Trial User	3/26/2009		
[-] [-] T Continent	Topic Type	Trial User	3/26/2009		
[-] [-] T City	Topic Type	Trial User	3/26/2009		
[-] [-] History	Occurrence Type	Trial User	3/26/2009		
[-] [-] Tourism	Occurrence Type	Trial User	3/26/2009		
[-] [-] has direct flight	Association Type	Trial User	3/26/2009		

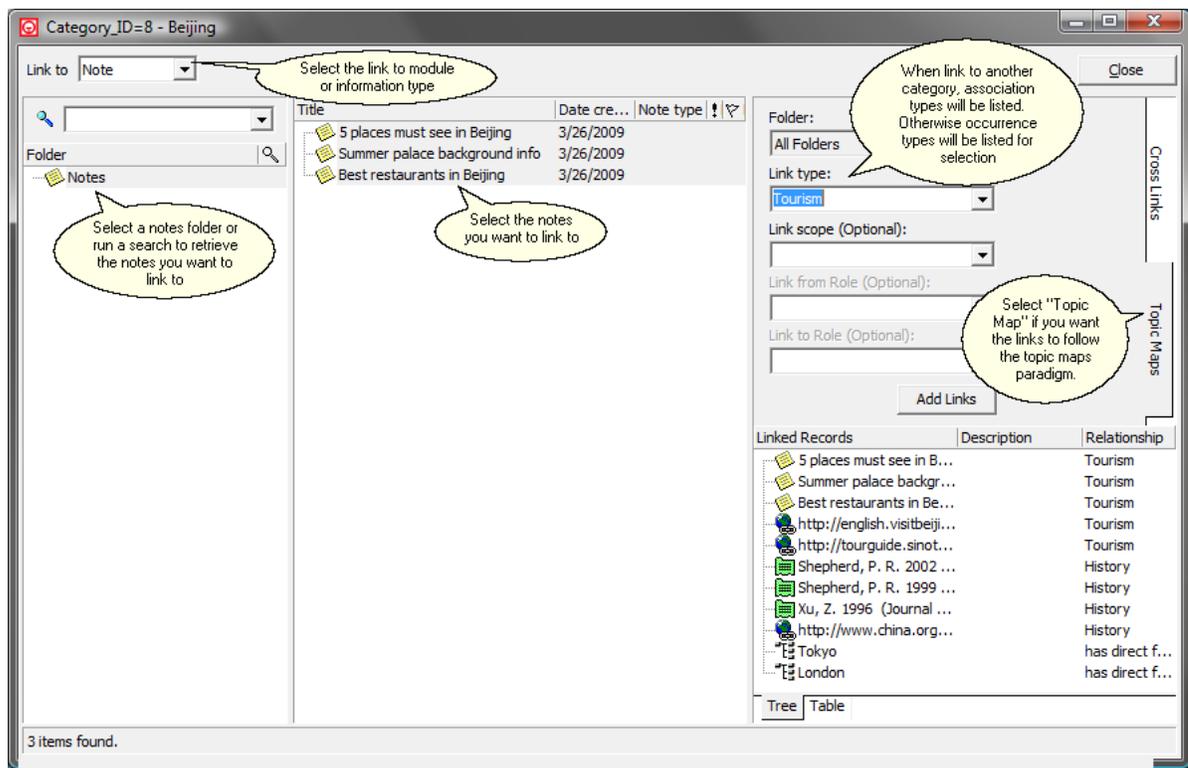
  

Category:	Type:														
<input type="text" value="Tourism"/>	<input type="text" value="Occurrence Type"/>														
Definition:	Other names:														
<input type="text"/>	<table border="1"> <thead> <tr> <th>Name</th> <th>Scope</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> </tbody> </table>	Name	Scope												
Name	Scope														
URI:	<input type="text"/>														

To create an association type, follow the same steps. First create a new category, and select "Association Type" as its type. When you create a link from a category to another category, you can select this "association type" category as the link relationship. In the above example, the category "has direct flight" is created as an association type.

#### Create associations and occurrences

In the above examples, we have created topics such as "Beijing" and "Tokyo". We have created occurrence types like "Tourism" and "History". We have also created association types like "has direct flight". They are all created as categories. It is time to link them together to create a knowledge map. First, select the category "Beijing". Click menu command "Category | Create Links | Link to Note...". The link window will be displayed. First, select the notes you want to link to in the middle panel. Then, go to the "Topic Maps" tab on the right panel. Select "Tourism" as the "Link type". Since we are linking to resources instead of another category, only those categories typed as "Occurrence Type" will be listed in the "Link type" combo box. Click the "Add Links" button to create the links. The newly added links will be shown at the bottom panel.



Associations are created in a similar way. First select "Category" on the top right corner as the "Link to" module. In topic maps, only when you link one topic (category) to another topic (category) is the link called an association. Select categories you want to link to in the middle panel. In this example, we selected "Tokyo" and "London". Select "has direct flight" as the "Link type". When you link to another category, only association types can be selected as the "Link type". Click the "Add Links" button to create links.

## 10.2 More about topic maps

We have covered the basic ideas of topic maps. Like tagging with categories, topic maps is another subject based classification technique. The simplicity of tagging makes it the most popular way to organize information objects. The advanced feature of topic maps makes it more suited for knowledge management. In this section, we will go through features of topic maps that are not covered in the basics section.

### Topic names

In topic maps, a topic can be given any number of names. These variant names are alternate forms of the base name. The ability to have more than one name for each topic can be used for many things. In the following example, "Beijing" is the base name. This official spelling is based on the Roman spelling (pinyin). The English spelling is Peking, which was used in English publications up until recent years. "Peiching" and "Pei-ching" are based on the Wade-Giles system which was used for most of the 20th century. When building a topic map, you can include all these names

under the "Other names" list. If needed, you can add a scope for each variant name. A scope defines the context of each variant name. A scope itself is a category. Let's add two new categories, "English" and "Wade-Giles" and select "Scope" as its type. If there are categories typed as "Scope", these categories will be shown in the drop down list when you click on the "Scope" column of the "Other names" list.

Category: Beijing	Type: City												
Definition: Beijing is a metropolis in northern China and the capital of the People's Republic of China. It is one of the four municipalities of the PRC, which are equivalent to provinces in China's administrative structure.	Other names: <table border="1"><thead><tr><th>Name</th><th>Scope</th></tr></thead><tbody><tr><td>Peking</td><td></td></tr><tr><td>Peiching</td><td></td></tr><tr><td>Pei-ching</td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></tbody></table>	Name	Scope	Peking		Peiching		Pei-ching					
Name	Scope												
Peking													
Peiching													
Pei-ching													
URI: <a href="http://en.wikipedia.org/wiki/Beijing">http://en.wikipedia.org/wiki/Beijing</a>													

Category: Beijing	Type: City												
Definition: Beijing is a metropolis in northern China and the capital of the People's Republic of China. It is one of the four municipalities of the PRC, which are equivalent to provinces in China's administrative structure.	Other names: <table border="1"><thead><tr><th>Name</th><th>Scope</th></tr></thead><tbody><tr><td>Peking</td><td>English</td></tr><tr><td>Peiching</td><td>Wade-Giles</td></tr><tr><td>Pei-ching</td><td>Wade-Giles</td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></tbody></table>	Name	Scope	Peking	English	Peiching	Wade-Giles	Pei-ching	Wade-Giles				
Name	Scope												
Peking	English												
Peiching	Wade-Giles												
Pei-ching	Wade-Giles												
URI: <a href="http://en.wikipedia.org/wiki/Beijing">http://en.wikipedia.org/wiki/Beijing</a>													

Scoped vairant names

## Scope

The screenshot shows the 'Scope' dialog box in Biblioscape 8. The dialog has several dropdown menus: 'Folder' set to 'All Folders', 'Link type' set to 'History', and 'Link scope (Optional)' set to 'French'. There are also empty dropdowns for 'Link from Role (Optional)' and 'Link to Role (Optional)', and an 'Add Links' button.

Below the dialog is a table of linked records:

Linked Records	Description	Relationship
5 places must see in B...		Tourism
Summer palace backgr...		Tourism
Best restaurants in Be...		Tourism
http://english.visitbeiji...		Tourism
http://tourguide.sinot...		Tourism
Shepherd, P. R. 2002 ...		History
Shepherd, P. R. 1999 ...		History
Xu, Z. 1996 (Journal ...		History
http://www.china.org...		History
Tokyo		has direct f...
London		has direct f...
http://www.amazon.f...		History

At the bottom of the table, there are two tabs: 'Tree' and 'Table'.

We have just mentioned how to scope a variant name. Scope can also be used in other parts of topic maps. When you form an association by linking one category to another or create an occurrence by linking one category to a reference or note, you can also scope this link. Using the above example, if we found a French Web site about Beijing's history and we want to add it as an occurrence, we can scope this occurrence as "French". First, let's create a category "French" and select "Scope" as its type. Next, create a link from the topic (category) "Beijing" and link it to a French web site. Select "Topic Maps" when creating the link. Select "History" as the link type and select "French" as the link scope.

The purpose of using scope is to add context to topics and the links between topics and resources. Humans are very good at dealing with context. When we read the word "Salsa", we immediately can tell whether it means the Salsa dance or Salsa sauce. When building topic maps, we need to add this context if it is needed.

## Association roles

Folder: All Folders

Link type: works for

Link scope (Optional):

Link from Role (Optional): Employee

Link to Role (Optional): Employer

Add Links

Linked Records	Description	Relationship
..... Ethan Allen		works for

Tree Table

When linking a topic to another topic, sometimes you need to specify the role each topic plays. For example, if you have two topics "John Smith" and "Ethan Allen", you create a link between them, and the link type is "works for", others may not know who works for who. In such a case, you can add association roles for each topic to indicate what role each topic plays. First, create two categories "Employer" and "Employee" and select "Association Role Type" as its type. When you link the topic "John Smith" to "Ethan Allen", you can select "Employee" as the "Link from Role", and "Employer" as the "Link to Role".

## Subject identity

Category: Beijing

Type: City

Definition: Beijing is a metropolis in northern China and the capital of the People's Republic of China. It is one of the four municipalities of the PRC, which are equivalent to provinces in China's administrative structure.

Other names:

Name	Scope
Peking	
Peiching	
Pei-ching	

URI: http://en.wikipedia.org/wiki/Beijing

When users build many topic maps, the same subject may adopt a different topic name in different topic maps. For example, the same subject "Beijing" may be named "Peking" in one topic map and be named "Beijing" in another one. When the two topic maps are merged, the computer program needs a subject indicator to know "Beijing" and "Peking" represent the same subject. This subject

indicator has to be  
addressable in the form of an  
URI.

# Managing a research library

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



XI

## 11 Managing a research library

The library module is not designed as a full fledged library automation software. Instead, it is meant to be used by amateur librarians to manage a small research library or even a personal library. There are many department level libraries operated without the use of any library software. These libraries usually have a journal collection too and do not have a full time librarian to manage it. The Biblioscape library module is designed for such libraries. It is integrated with the bibliographic database (References module) and the knowledge base (Notes module). Therefore, it is an ideal solution for university department libraries, small corporate libraries, research group libraries, and even personal libraries. Although it is not meant to compete against the heavy weights, it has most of the sub-modules. These include: catalog, serials, circulation, interlibrary loan, borrowers, lenders, and suppliers.

### 11.1 Borrowers

The Borrowers module is for storing borrower's names and contact information. In other modules like Circulation, the borrower's name is picked from this table, instead of entered each time.

#### Create a borrower

1. Click the menu command "Borrowers | New Loan".
2. Enter the borrower's data on the right panel.

#### Delete borrowers

1. Select the borrowers you want to delete.
2. Click the menu command "Borrowers | Delete".

#### Search borrowers

1. Click the menu command "Borrowers | Search".
2. Select the field you want to search.
3. Select the search condition and enter the search text.
4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all borrowers again, click the menu command "Borrowers | Retrieve All".

### 11.2 Catalog

The Catalog module uses the same set of reference types as the Reference database. They include: Book, Serial, Report, etc. You can enter data directly into the catalog table, or you can send records from the Reference table into the Catalog table. Therefore, you can build import filters for different data sources, import them into the Reference table, then send them into the Catalog table.

### Create an item

1. Click the menu command "Catalog | New Item".
2. Enter the item data on the right panel.
3. Once moved to another record, the new item will be saved to the database.

Each catalog item corresponds to a single physical item. In other words, if you have two copies of the same book, you need to create two catalog items. In the catalog table, there is a field called "Copy". In the catalog editor, this field is grouped under the section "Holding". If you have two copies of the same book, create a catalog item for copy one and put "1 of 2" in the field Copy. Create another catalog item for copy two and put "2 of 2" in the field Copy. For most of the books, you probably only have one physical copy. The field Copy should be left blank.

### Create items from existing references

1. Go to the References module "Go | References".
2. Select the records you want to add to the Catalog.
3. Click the menu "Reference | To Other Modules | Send to Catalog".

### Import records to catalog

Unlike the References module, the Catalog module does not have customizable import filters. But, you can transfer records from the References module to the Catalog module with a single click by going to menu command "References | To Other Modules | Copy to Catalog". It is still possible for users to import tagged data from any source by creating an import filter in References module. When you create an import filter, you need to know how data is transferred from the References module to the Catalog module. You can decide how to map import data to database fields of the reference table. Most data fields between the two modules have the same name. The following list shows those fields with different names between the two modules.

#### **Catalog : References**

Cat\_type : Ref\_type  
Subtitle : Title\_short  
Author\_corp : Address  
Source : Sec\_title  
Subject : Keywords

### Delete items

1. Select the items you want to delete.
2. Click the menu "Catalog | Delete".

### Search items

1. Click the menu command "Catalog | Search".
2. Select the field you want to search.
3. Select the search condition and enter the search text.

4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all items again, click the menu command "Catalog | Retrieve All".

## 11.3 Circulation

The circulation module handles check-in, check-out, renew, hold, etc. All these activities are logged and can be searched, grouped, and analyzed. If you know how to use SQL, custom reports can be built to display data in the way you like.

### Check out

1. Click the menu command "Circulation | Check Out".
2. Select the borrower name from the combo box. If the borrower's name is not in the list, go to the Borrowers submodule first by clicking the menu command "Library | Borrowers" and adding a borrower.
3. Select the catalog item "Title" or "ID".
4. Make sure the "Date Due" is correct. If there are any comments about this transaction, add it to the comment box. Check the "Permanent" box if the borrower does not have to return it by any set date.
5. Click the "Check Out" button.

### Check in

1. Click the menu command "Circulation | Check In".
2. Select the item "Title" or "ID" from the combo box.
3. Click the "Check In" button.

Note: If there is a hold on the item being checked in, after clicking the "Check In" button, Biblioscape will remind you about the Hold.

### Renew

1. Click the menu command "Circulation | Renew".
2. Select the item "Title" or "ID" from the combo box. The checked out item detail will be shown in the grid below.
3. Select a new due date.
4. Click on the "Renew" button.

### Hold

1. Click the menu command "Circulation | Hold".
2. Select the borrower's name who requested a hold.
3. Select the item to hold by "Title" or "ID" from the combo box.
4. Click the "Hold" button.

### Review circulation history

All the circulation activities are recorded in a log. You can review the history by going to the menu command "Circulation | History". The circulation history table can be sorted by clicking on a column header. Clicking on the column header again will sort the table in reverse order.

You can also group by any column by going to "View | Current View | Group By", then dragging a column to the top panel. There are several predefined views you can use by going to "View | Current View".

### Search circulation history

1. Click the menu command "Circulation | Search".
2. Select the field you want to search.
3. Select the search condition and enter the search text.
4. Click the OK button to start search.

Retrieve all items: After doing a search, if you want to display all items again, click the menu command "Circulation | Retrieve All".

## 11.4 Interlibrary loan

The Interlibrary Loan module is for borrowing books from other libraries on behalf of your users. It is intended to be used for materials for which there is not a recurring demand, not as a replacement for good collection development. Use it to record the request date, request item, date due, shipping method, etc. You can use the report writer to build reports for special requirements.

### Create a loan

1. Make sure the requester is in your borrowers list. If not, go to "Library | Borrowers" and add a new borrower.
2. Click the menu command "Interlibrary | New Loan".
3. Select the borrower and lender from the combo box and enter all other required information.

**Delete loans**

1. Select the loans you want to delete.
2. Click the menu "Interlibrary | Delete".

**Search loans**

1. Click the menu command "Interlibrary | Search".
2. Select the field you want to search.
3. Select the search condition and enter search text.
4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all items again, click the menu command "Interlibrary | Retrieve All".

## 11.5 Lenders

The lenders module includes the names of libraries that lend materials to you through Interlibrary Loan.

**Create a lender**

1. Click the menu command "Lenders | New Lender".
2. Enter the lender's data on the right panel.

**Delete lenders**

1. Select the lenders you want to delete.
2. Click the menu "Lenders | Delete".

**Search lenders**

1. Click the menu command "Lenders | Search".
2. Select the field you want to search.
3. Select the search condition and enter the search text.
4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all borrowers again, click the menu command "Borrowers | Retrieve All".

## 11.6 Serials

The serials module is used for managing issues in your journal subscriptions. Journal and magazine subscriptions are an essential part of a research library. Serials usually account for about half of a research library's collection. Ordering serials is handled in the Catalog module. Issue tracking, check-in, routing, and claiming is done in the Serials module.

### Create an issue

The Serial title must be entered into the catalog table as type "Serial". After going to the Serials sub-module, all serial titles will be displayed on the left pane. The issues related to a specific serial will be displayed on the top right pane accordingly.

1. Click the menu command "Serials | New Issue".
2. Enter the data in the bottom right pane.

### Delete issues

1. Select the issues you want to delete.
2. Click the menu command "Serials | Delete Issues".

### Search issues

1. Click the menu command "Serials | Search Issues".
2. Select the field you want to search.
3. Select the search condition and enter the search text.
4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all issues again, click the menu command "Serials | Retrieve All Issues".

### Create a serial

1. First, go to the Catalog sub-module by clicking the menu command "Library | Catalog".
2. Click the menu command "Catalog | New Item".
3. Select "Serial" as the "Record Type".
4. Enter the rest of the item data on the right panel.

### Delete serials

1. Select the serial items you want to delete from the right pane.
2. Click the menu "Serials | Delete Serials".

### Search serials

1. Click the menu command "Serials | Search Serials".
2. Select the field you want to search.
3. Select the search condition and enter the search text.
4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all serials again, click the menu command "Serials | Retrieve All Serials".

## 11.7 Suppliers

The suppliers module lists all suppliers of your library. If an item in your catalog is purchased

through a supplier, you can link it to the supplier table instead of entering the supplier's name each time.

**Create a supplier**

1. Click the menu command "Supplier | New Supplier".
2. Enter the supplier's data on the right panel.

**Delete suppliers**

1. Select the suppliers you want to delete.
2. Click the menu command "Suppliers | Delete".

**Search suppliers**

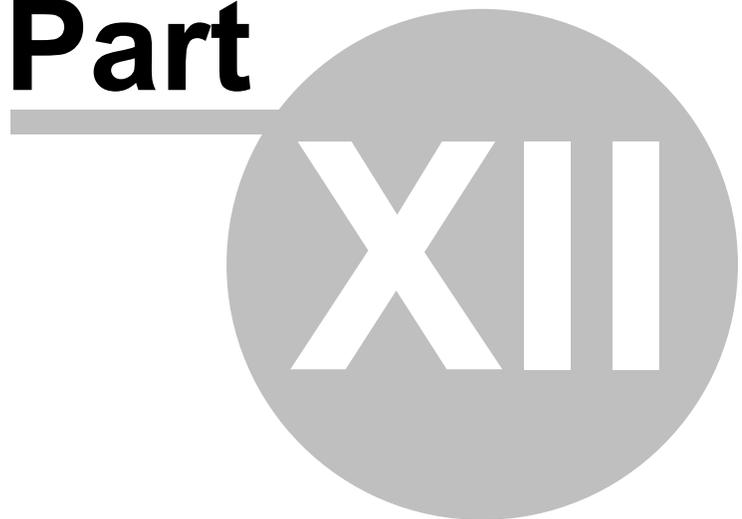
1. Click the menu command "Suppliers | Search".
2. Select the field you want to search.
3. Select the search condition and enter the search text.
4. Click the OK button to start the search.

Retrieve all items: After doing a search, if you want to display all suppliers again, click the menu command "Suppliers | Retrieve All".

# Publishing on the Web

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



## 12 Publishing on the Web

### [About BiblioWeb server](#)

---

The introduction of web browsers has made the Internet the fastest growing area in information technology. In today's world, anyone can be a publisher on the Web. As a research scientist, you may want to publish your reference collections on your web site, share a common bibliographic database with your colleagues, or access basic bibliographic software features over the Web. With the Biblioscape web server, you can do all of these things.

Biblioscape comes with its own web server – BiblioWeb.exe. By combining a web server, database access, and bibliographic specific functions into a single program, we have achieved the following:

- Fast performance, because the database connection is now persistent. The new BiblioWeb.exe can support a large number of concurrent web users without big performance loss.
- A rich set of features because of the tight integration between the web server and bibliographic application. The new BiblioWeb now supports importing bibliographic records over the web and displaying marked bibliographic records in a selected style; users can even format a document over the web.

### [System requirement](#)

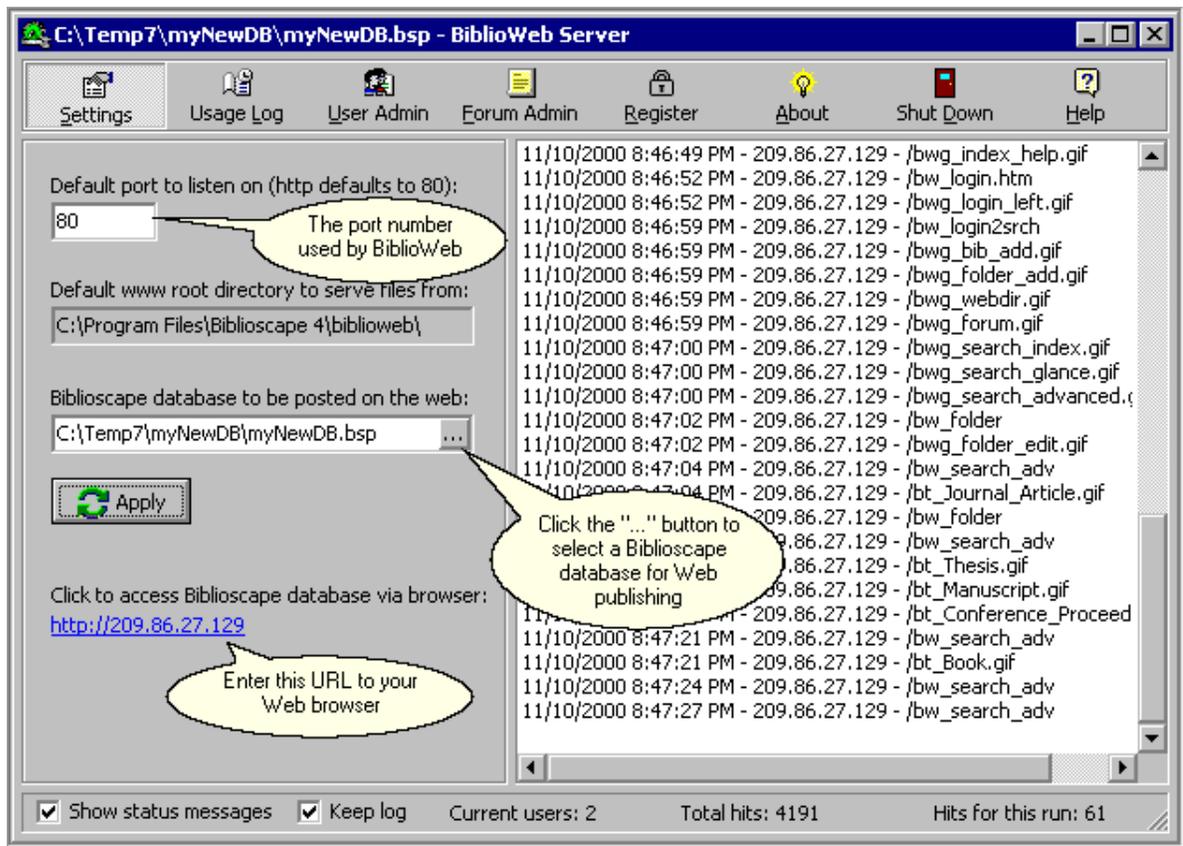
---

Since BiblioWeb.exe is a web server itself, you don't even need to have a web server installed. Just install Biblioscape on your PC, and the BiblioWeb server is installed as part of Biblioscape. To run the BiblioWeb server, just double click "...\BiblioWeb\BiblioWeb.exe".

- PC with Windows 95, 98, Me, NT4, 2000, XP, Vista
- PC has to be on the Internet or Intranet
- Biblioscape has to be installed

### 12.1 Setting up BiblioWeb server

In most cases, the BiblioWeb server does not need any configuration. Run BiblioWeb.exe, and your Biblioscape database is automatically on the Web. By default, the BiblioWeb server will post the sample database on the Web. If you want to post another database, just click the "..." button at the edit box "Biblioscape database to be posted on the Web". Then select the desired Biblioscape database. Click "Apply" to update the changes. By default, the BiblioWeb server uses port 80. If that port is already used by another web server, BiblioWeb will use port 8001 instead.



Once the BiblioWeb server is running, you can access your database with a web browser by entering the URL indicated under the label "Click to access Biblioscape database via browser". This is the IP address of your PC. If you use a port other than the default (port 80), you need to add the port number at the end. For example, if port number 8001 is used and the IP address of your PC is 209.86.27.129, you should use the following URL <http://209.86.27.129:8001>

### Firewall

Some security software like ZoneAlarm will block all unused ports. If the port used by BiblioWeb is blocked, You won't be able to access BiblioWeb from other computers. You need to change settings in your security software to unblock that port.

### Router

For home computers, BiblioWeb is most likely run on a computer that is behind a router. The IP address listed by BiblioWeb is the IP address assigned by your LAN. It should start with 192.168.... You cannot use this IP address to access BiblioWeb from computers outside of your LAN. Only the router has an IP open to the world; you should use that IP address instead. To find your IP address on the Internet, please visit <http://checkip.dyndns.org>.

Please make sure the port used by BiblioWeb (80 by default) is not blocked by the router. Also, configure your router to forward traffic on that port to the computer on which BiblioWeb runs. For

example, if that computer's internal IP address is "192.168.0.3", configure the router (this is sometimes called "port forwarding") so that it sends all traffic it receives from the Internet from port 80 to "192.168.0.3".

### **Attachments**

By default, Biblioscape creates a sub-folder called "attachments" under the database folder when a new database is created. It is recommended all attachment files are kept under this folder. Biblioscape will automatically use relative path when files under this folder are put into the attachment of a reference. The links won't be broken when a database is moved from one computer to another. If you want to make the attachment files available for download for BiblioWeb users, you have to copy the "attachment" folder under the database folder to the "BiblioWeb" folder. The attachment hyperlinks will then work for BiblioWeb users.

### **BiblioWeb server usage log**

All BiblioWeb server activities are logged. If your server is a very busy one, you should periodically clear this usage log table. There is no need to clear the table too often, you can do it once the number of records exceeds 50,000. Before clearing the log table, you can export it to a comma delimited file by clicking the "Export" button. If you charge your BiblioWeb users base on their usage, the usage log becomes very important. Otherwise, you can choose to not keep the usage log. On the BiblioWeb server main window, check off the box "Keep Log" on the window's status bar.

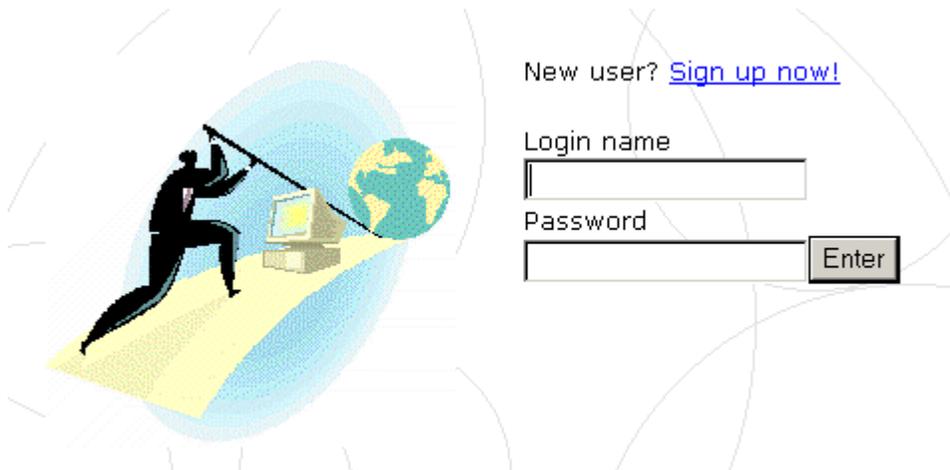
### **Manage BiblioWeb forum**

Besides posting bibliographic databases on the Web, the BiblioWeb server also lets you manage a Web based discussion forum. The BiblioWeb powered discussion forum can be used by any number of users without the need to login. Lets assume the IP address of your PC is 128.163.2.12. To let web users access the discussion forum, create a hyperlink pointing to [http://128.163.2.12/bw\\_forum](http://128.163.2.12/bw_forum)

Each posted message can be assigned a "topic" by the poster. The BiblioWeb owner can control what topics can be made available by editing the file "web\_forum\_topics.txt" in the "Global" sub-directory under directory which Biblioscape is installed.

### **Manager BiblioWeb users**

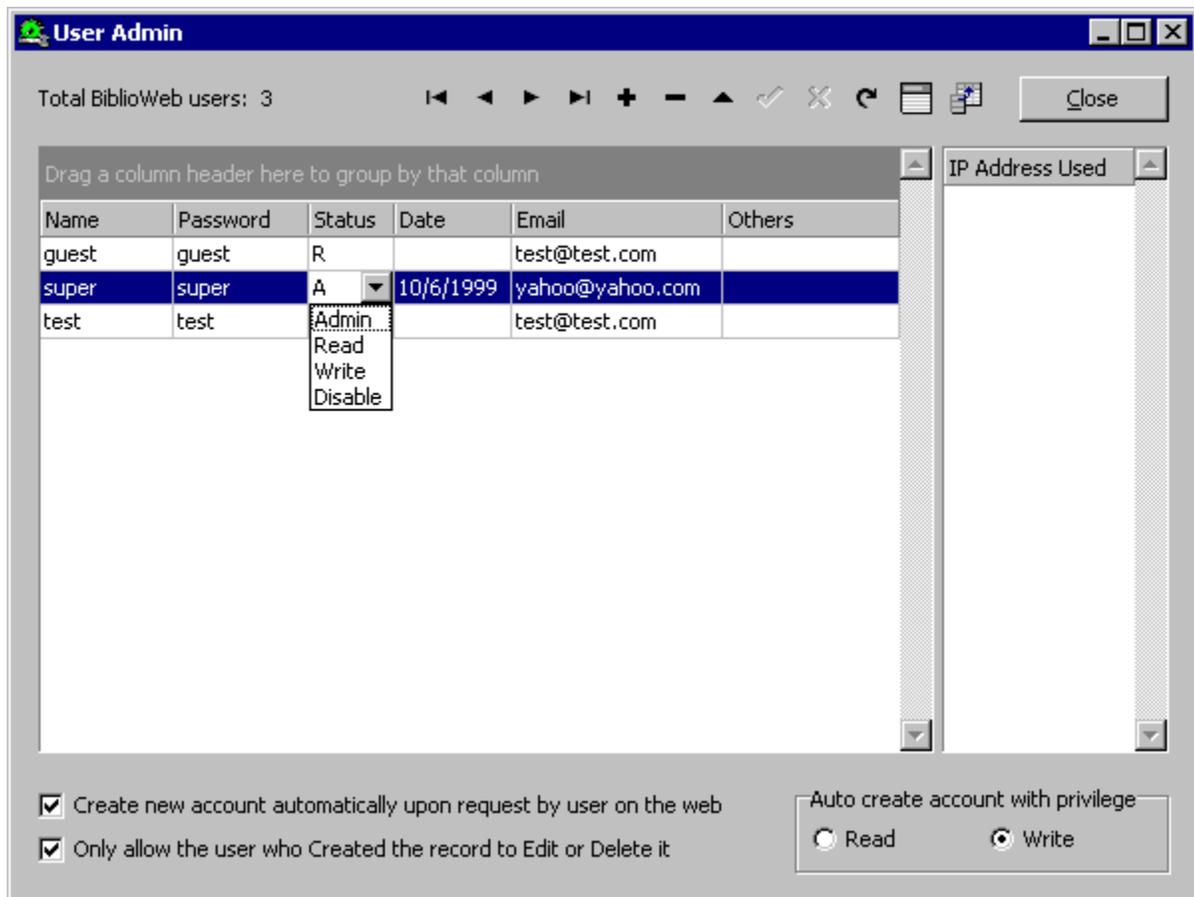
BiblioWeb users have to log on to the server before use. If the user does not have an account, he or she can apply for an account by clicking on the "Sign up now!" hyperlink.



To apply for an account, users must enter a preferred login name, password, a valid email address, as well as other information required by the BiblioWeb owner. After sending this information to the BiblioWeb server, the applicant may be given an account automatically by the server if BiblioWeb is configured to do so.



BiblioWeb users can be assigned different privileges under the Status column. A "Read" user can only search and browse the database. A "Write" user can also add new records, and edit or delete existing records. On the user admin window, you can check the box "Only allow the user who created the record to Edit or Delete it". An "Admin" user can edit or delete any record. If you change a web user's status to "Disable", the user won't be able to log in to the server. When you configure the server to "Create new account automatically upon request by user on the Web", you can let the server assign the new account a "Read" status or "Write" status.



## 12.2 Running BiblioWeb server as a Windows service

The BiblioWeb server that comes with Biblioscape installation can be run as both a regular Windows application and a Windows service. Although you can put it into the startup folder and let it run automatically when logging in to your PC, you need to login to your PC in order for it to run. If you need to install BiblioWeb on a PC shared by several users, you may prefer to make BiblioWeb run as Windows service. When running as Windows service, the BiblioWeb server will be started automatically after a reboot; you don't need to log into your system in order to start it, and user login and logoff won't affect the service. If you are not familiar with the Windows service feature, click [here](#) to learn more about it.

### Windows Vista

Click the Windows Start button and type "task scheduler". Select the program "Task Scheduler" to run it. Click "Action | Create Basic Task..." to add a job using the wizard. Give it a name like "BiblioWeb" and a short description. Click Next. On the "Trigger" tab, select "When the computer starts" under "When do you want the task to start". Click Next button. Under "What action do you want the task to perform", select "Start a program" and click the Next button. Click the Browse button to select "BiblioWeb.exe" under the BiblioWeb folder of your Biblioscape installation. Click the Next button, and then click "Finish" to create the task. Go to the Task Scheduler main window

and double click the task you have just created. Under the "General" tab, check the box "Run whether user is logged on or not". On the "Settings" tab, check off the box "Stop the task after...". Click the OK button. You will be prompted to enter a password. You have to enter a Windows account with admin privilege to make BiblioWeb run at computer startup without logging in. If you do not have the admin privilege, the task will not run until you are logged in to Windows. To remove BiblioWeb from scheduled tasks, just delete it from the list.

#### **Windows 2000/XP**

To install BiblioWeb as a Windows service, go to "Start | Run". Enter the path of BiblioWeb.exe by clicking on the "Browse" button. Add " /install" at the end. For example: "C:\Program Files\Biblioscope 5\BiblioWeb\BiblioWeb.exe /install". The service won't start automatically after installation. You can go to the Windows service manager to start it. The service will be automatically started when you restart the computer. To remove BiblioWeb from Windows services, replace the " /install" with " /uninstall".

Note: When running BiblioWeb as a Windows service, you can still run BiblioWeb as a regular Windows application to change settings. The changes made won't be applied until you reboot the computer or restart the BiblioWeb service.

## **12.3 Customize BiblioWeb user interface**

You can customize the look and feel of a BiblioWeb powered site by changing the \*.htm files under the "BiblioWeb" directory. You should not change the word with two "%" around it, for example %bw\_msg%. These tags are used by the BiblioWeb server. Besides this, you can change all other parts of a htm file to give it a consistent look and feel to go with your web site.

#### **Hide certain fields of a reference record**

If you don't want BiblioWeb users to see the content of certain fields, you can hide them. For example, you may not want others to see what's in the "Notes" field of your reference. You can start Biblioscope and go to "Tools | Options". Under the "Others" tab, check the fields you want to hide under the "Web Post Hide" fields. For each reference record in Biblioscope, on the reference editor, go to the "All Fields" tab, and check the box "Web Post Hide" at the bottom of the list. This setting only applies to the reference record display form, not the edit form.

#### **Customize fields name in advanced search**

If your reference types are highly customized, you may want to change the field names in the advanced search drop down list. You can do this by editing the file "...\Biblioscope x\Global\fields.txt". Once changed, restart BiblioWeb. New names will be used. After the changes, the field names in Biblioscope are also changed because Biblioscope and BiblioWeb share the same file. When editing the file "fields.txt", do not remove any "lines" or "fields" orders, because the fields in this

file have to match the fields in another file "fldFldName.txt" exactly. If you want to change a field's order or remove fields, you have to do it carefully in both files. Any mismatch will cause Biblioscape and BiblioWeb to not run properly. Be sure to copy the fields for backup before doing any changes.

## 12.4 Create hyperlinks to BiblioWeb records

Once the Biblioscape database is published on the Web by BiblioWeb, you can link to it from your Web site, your word document, etc. Since BiblioWeb content is protected, you need to add the login name and password info into the URL. For example, if your user name is "guest" and your password is also "guest", you can enter the following URL to display a reference record:

```
http://216.205.78.164:8001/bw_ref_bib.htm?  
RefID=5838&hiwords=&edit_loginname=guest&edit_password=guest
```

You can add the "&edit\_loginname=guest&edit\_password=guest" text to the end of any BiblioWeb URL to gain access to a record, search, etc. This makes it easy to access your database from other places like your word document, a web page, etc. Here are more examples:

### Create an automatic login hyperlink

---

To access a BiblioWeb powered site, users need to have a login account. If BiblioWeb is licensed by "concurrent users" or "hits", you can create a hyperlink to let Web users log in to BiblioWeb with just one click. The following code shows you how to create such a link in HTML.

```
Try a <a href="http://128.192.2.200:8002/bw_login2srch?  
edit_loginname=guest&edit_password=guest">live</a> example.  
Create a hyperlink to run a search without an account.
```

You can create a hyperlink to run an Advanced Search on a BiblioWeb server without account information, but individual record can't be displayed out the search result set, because a proper user login is required for that. The following example shows you how to create such a link in HTML.

```
This is a test for hyperlinked query. <A HREF="http://128.192.2.200:8002/bw_search_adv?  
sql=select+bib.*+from+bib+where+bib.authors+like+'%25Smith%25'+&hiwords=smith"> Try  
this link for all publications by Smith</A>
```

### Create a hyperlink to login and run a search

---

If you want the user to be able to browse searched records, you need to add the login information plus the query into the hyperlink. In other words, the user login and a pre-defined search is run in

one click. To take advantage of this feature, the BiblioWeb server should be licensed by "concurrent users" or "hits", because when licensed by "number of users", each user account can't access the server from more than 5 machines. Here is an example of such a link.

This is a test for auto-login plus hyperlinked query in one click. <A HREF="http://128.192.2.200:8002/bw\_login2srch?edit\_loginname=guest&edit\_password=guest&bw\_search\_adv?sql=select+bib.\*+from+bib+where+bib.title+like+'%25Synthesis%25'+&hiwords=synthesis"> Try this link for all publications that have the word "Synthesis" in the title</A>

## 12.5 BiblioWeb server license

To satisfy the needs of our customers, the BiblioWeb server is licensed in 2 ways: by the number of hits or by the number of concurrent users. You should pick the one that best fits your needs. You can switch to the other license mode later at any time. Biblioscape Professional edition comes with 3 "Write" user accounts, 3 "Read" user accounts, 50,000 hits accounts, or 1 concurrent user account. Biblioscape Librarian edition comes with 3 concurrent user accounts.

### [License by the number of hits](#)

---

When the BiblioWeb server serves a request, it is counted as a hit. A hit can be a search request or a graphic file inside a Web page. During a user session, the same graphic won't be counted twice for a hit. Because it is cached in user's Web browser, all hits served by BiblioWeb server are logged. When licensed by the number of hits, the BiblioWeb server does not care how many users do you support, whether they are "Write" accounts or "Read" accounts. As long as the number of hits served by the BiblioWeb server does not exceed the number of hits licensed, the BiblioWeb server will function. Once this number is exceeded, you need to purchase more Hits. This is an ideal solution if your Web users are Internet users and they connect to the Web through ISP dial up access.

### [License by the number of concurrent users:](#)

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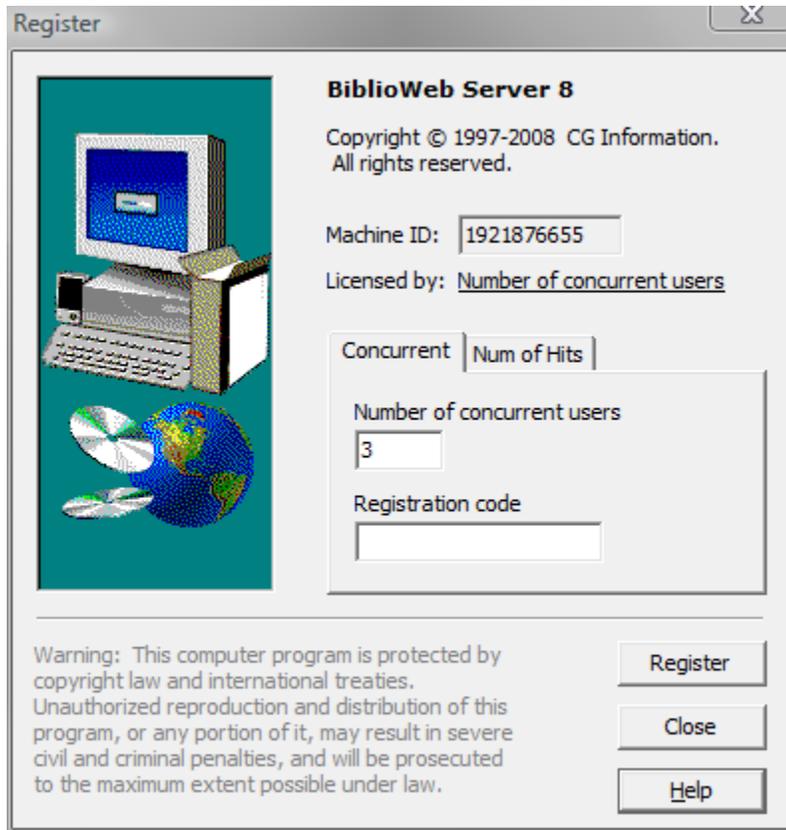
You can also license a BiblioWeb server by the number of concurrent users. Under this mode, the BiblioWeb server does not care about the number of users supported or the number of hits served as long as the number of users currently logged on to the server does not exceed the number licensed. When a Web user logs on, he or she is counted as one concurrent user. If this user does not send any request to the server in 15 minutes, he or she is automatically logged off. The number of concurrent users is decremented by one.

### [Register in BiblioWeb server](#)

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If the BiblioWeb server account that comes with the Professional or Librarian edition can no longer

satisfy your needs, you can purchase more BiblioWeb server accounts. After purchasing, you will be given a registration key by email. To register the BiblioWeb server, click the "Register" button. Select the license mode by clicking on the tab. Enter the new account's number and registration code into the edit box and click "Register" button.



### Switch license mode

By default, BiblioWeb is set to use license mode "Num of Hits". This is the least restrictive mode. You can add an unlimited number of web users and support an unlimited number of concurrent users. Once the 50,000 hits are used up, you can switch to other license mode easily. This way, you can continue to use the BiblioWeb server while evaluating which additional web user license you want to buy.

To switch the BiblioWeb server license mode, just select one of the tabs - "Concurrent", "Num of Users", or "Num of Hits", and click the "Register" button. You don't need any code for switching to another license mode. If you bought the Librarian edition, it comes with 3 concurrent user licenses. You should switch to the "Concurrent" license mode after the default 50,000 hits are used up.

# Sharing a database

"We are drowning in information,  
but starved for knowledge."  
~~ John Nesbitt

# Part



XIII

## 13 Sharing a database

Biblioscape allows a single database to be shared by many users with an Internet connection or a Local Area Network (LAN) connection. Biblioscape installation includes a database server called BiblioRemote. Anyone using Biblioscape can then be given full or limited access to a shared database via the server. This provides an alternative to BiblioWeb as a way of accessing a Biblioscape database remotely, and it is provided free with all editions of Biblioscape. Not only does it allow groups of users to share a single database from anywhere in the world, it also allows a single user who works from more than one location to use the same database.

To open a database through the BiblioRemote server, users on remote computers have to run Biblioscape first. Instead of opening a database on their local computer, they open a small file which has all the necessary identifying information to locate the BiblioRemote server on their LAN or the Internet. Authentication (i.e. user name and password) can either be embedded in the small file or asked for each time the user opens a connection to the remote database. Once the connection to the remote database is opened, Biblioscape behaves almost exactly as it would if the database were on the local computer. The main difference is that it responds somewhat more slowly, because the data displayed must be transferred over the LAN or the Internet. The faster the connection, the less noticeable the lags.

Besides sharing a Biblioscape database through the BiblioWeb server and the BiblioRemote server, you can also access a Biblioscape database from other applications through the Biblioscape ODBC driver. This makes it possible for developers to integrate a Biblioscape database into a bigger information system. The Biblioscape ODBC driver can be purchased separately.

### 13.1 Setting up BiblioRemote server

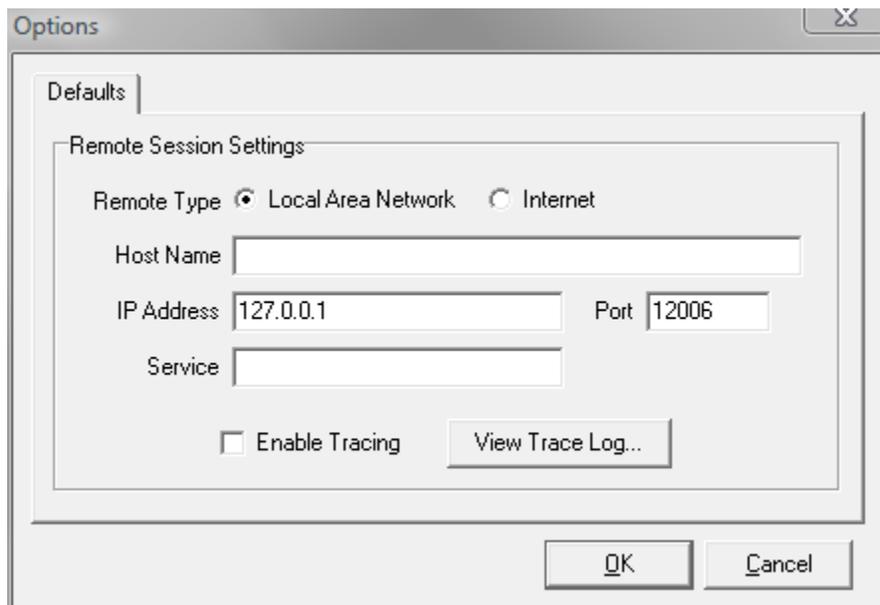
If your organization has Biblioscape users at different locations, you can set up Biblioscape in a client/server environment so remote users can access a common database through the Internet. Even if all your users are on the same Local Area Network (LAN), using BiblioRemote is still a better way to share a database than simply putting the shared database on a file server and letting end users open it directly. When opening a database through the BiblioRemote server, the end user won't see much difference. The database could be located in another city, state, even continent. Even for a single user who wants to use a common database for work and home, setting up Biblioscape with Client/Server configuration can be a good solution as well, provided you have fast Internet access at home like DSL or cable modem. Setting up Biblioscape for client/server use doesn't cost any extra money if you have less than 3 concurrent users, because the server is installed as part of Biblioscape under the folder "BiblioRemote". Under that folder, there are two executables: "dbsrvr.exe" and "srvadmin.exe". You need to have the database server "dbsrvr.exe" running first. Then run "srvadmin.exe" to do the configuration as explained in the next section.

With the BiblioRemote server running, you can let other Biblioscape users open a Biblioscape database published by BiblioRemote. The remote machine could be on your LAN or on the Internet which could be a machine in any place with broadband connection. By default, the BiblioRemote server supports 3 concurrent connections for personal use for free. If your organization needs to support more concurrent users, please order additional licenses at our web site.

### Server setup

To have BiblioRemote access set up correctly, you need to have a PC designated as server which must have a permanent IP address. If you want users outside your firewall to open databases through BiblioRemote, you must open the ports used by BiblioRemote on both the server PC and client PC. The client PC must have Biblioscape installed and have Internet or Intranet access. The server PC doesn't need to have Biblioscape installed. However, we recommend you do so, because some activities such as database maintenance and record importation are much quicker to perform on the server PC locally. If your server PC doesn't have Biblioscape installed, please copy the directory "BiblioRemote" under your Biblioscape root folder to the server PC.

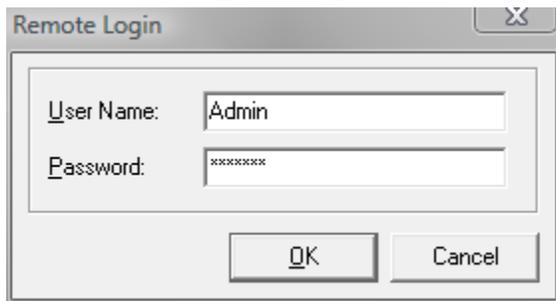
1. On the server PC, run "dbsrvr.exe", which is under the BiblioRemote folder. You can also run "dbsrvr.exe" as a Windows service. This will be explained in the next section.
2. On the server PC, run "srvadmin.exe" under the BiblioRemote folder, and go to "File | Options...".



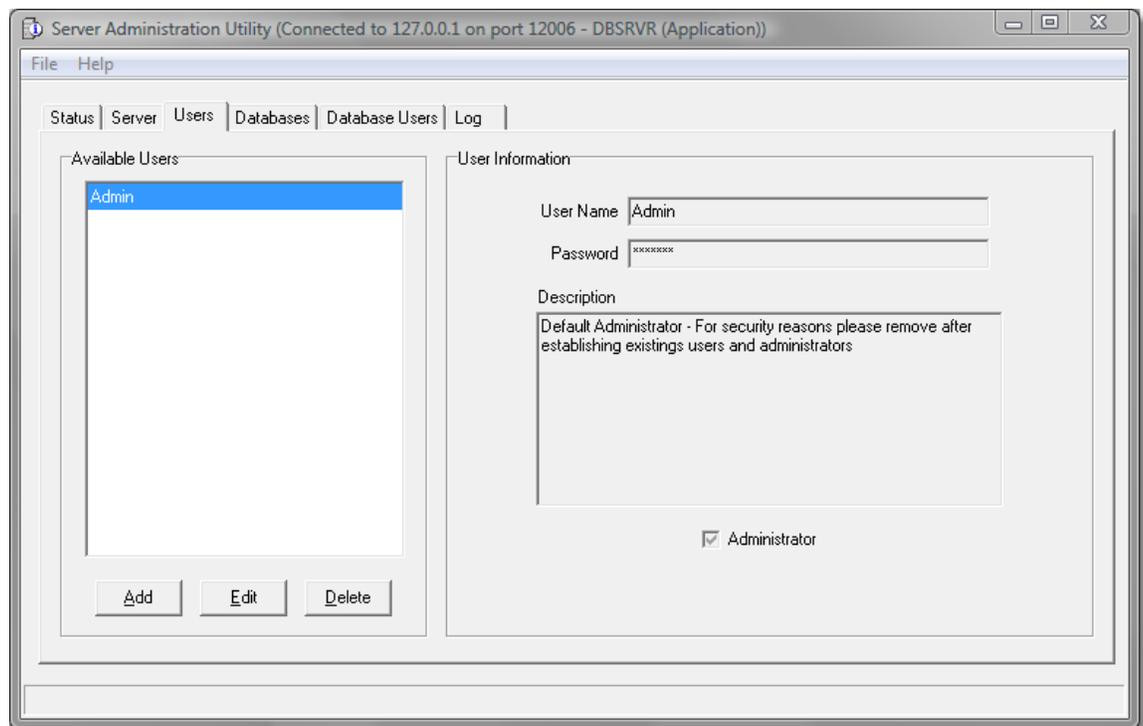
3. On the "Default" tab, select "Local Area Network" as the "Remote Type". Enter the host name or IP address of the server PC in the appropriate fields. Since both "dbsrvr.exe" and

"srvadmin.exe" are on the same machine, you can enter "127.0.0.1" as the IP address and leave "Host Name" and "Service" blank. Enter "12006" as the port number. "dbsrvr.exe" and "srvadmin.exe" will communicate with each other using this port. Click the "OK" button to close the window.

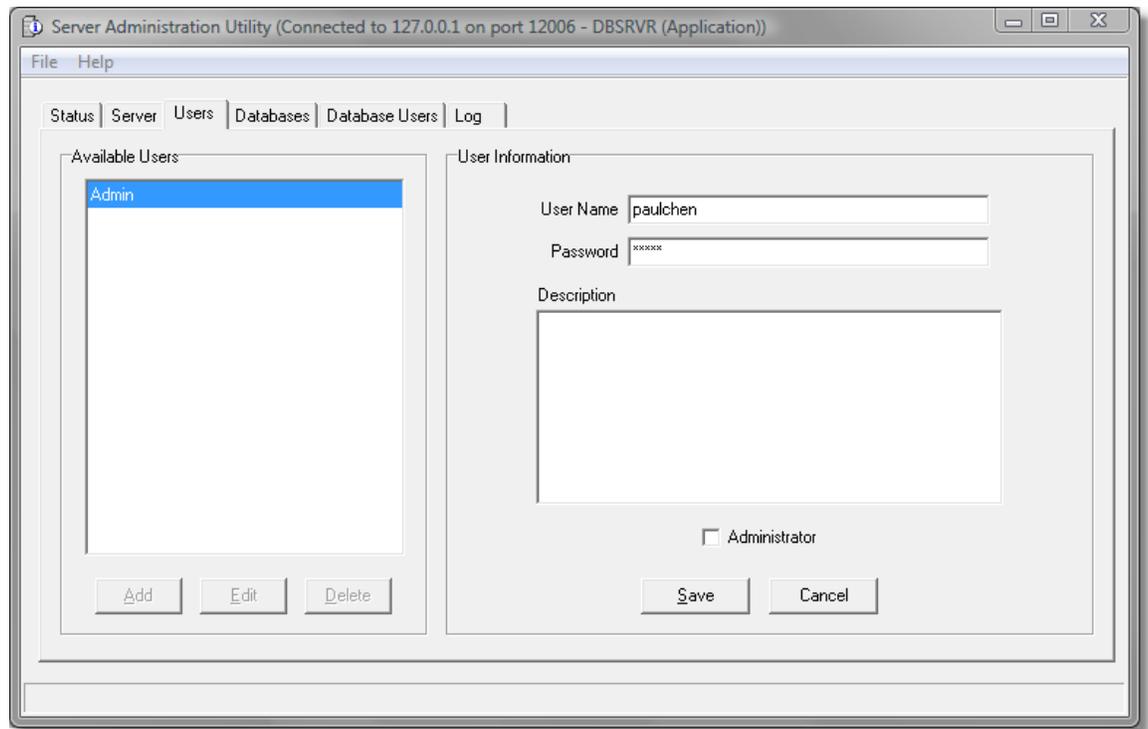
4. In srvadmin, go to "File | Login to Server". Enter "Admin" as User Name and "DBAdmin" as Password to login. This is the default password; please change it after the first login for security reasons. If you cannot login, please make sure the two ports used by BiblioRemote server port 12005 and 12006 are not blocked by a Windows firewall. These two ports are blocked by default in Windows Vista. Click [here](#) to learn how to open a blocked port.



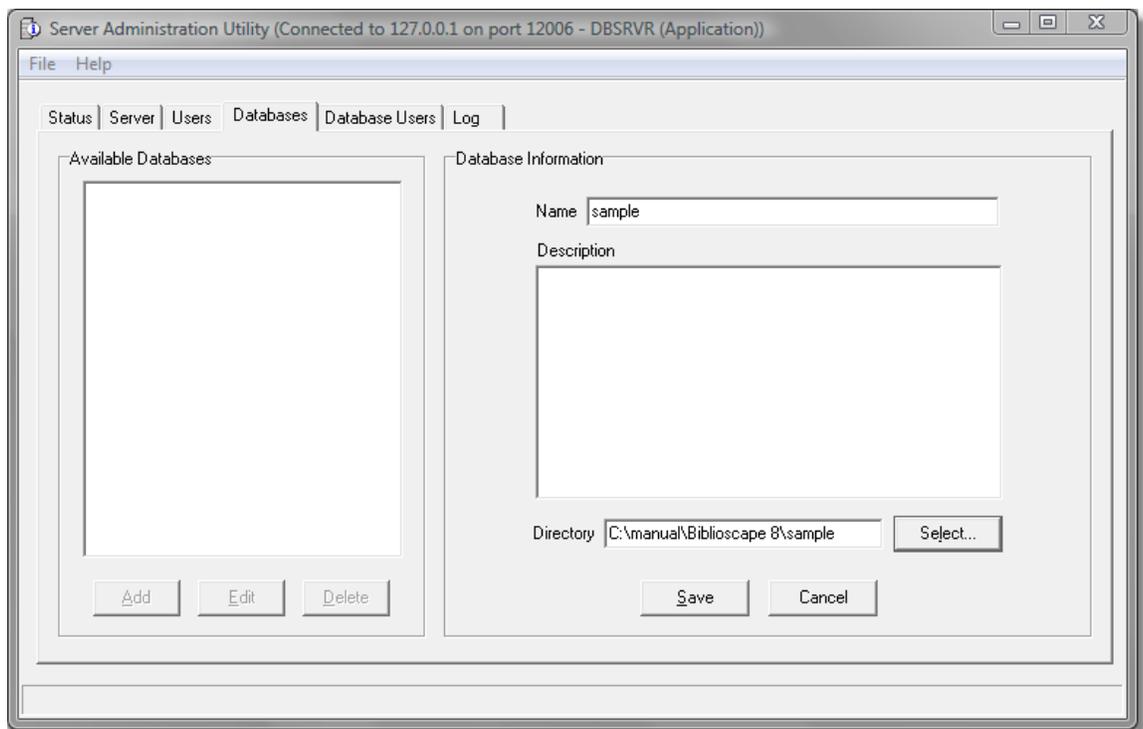
5. After logging in to the server, go to the "Users" tab. You should change the password for the Admin account instead of keeping the default password. Click the "Edit" button, and enter a new password. Please keep your new password in a secure place. Click the "Save" button to make the changes. Then, click the "Add" button to add a new user. You can also continue to use the Admin account if you wish. If you need to support more than one BiblioRemote user, you should use srvadmin to create an account on the BiblioRemote server for each user.



In this example, let's create a new user and assign this user to a database. Click the "Add" button. On the right, enter the user name and type a password. Leave the "administrator" box unchecked because you do not want to let users to have the admin privilege. The user name and password will be used to create a connection file for remote Biblioscape users to open this database. You can create an account for each end user, or you can simply create one end user account and let all Biblioscape users connect to the shared database using the same account.

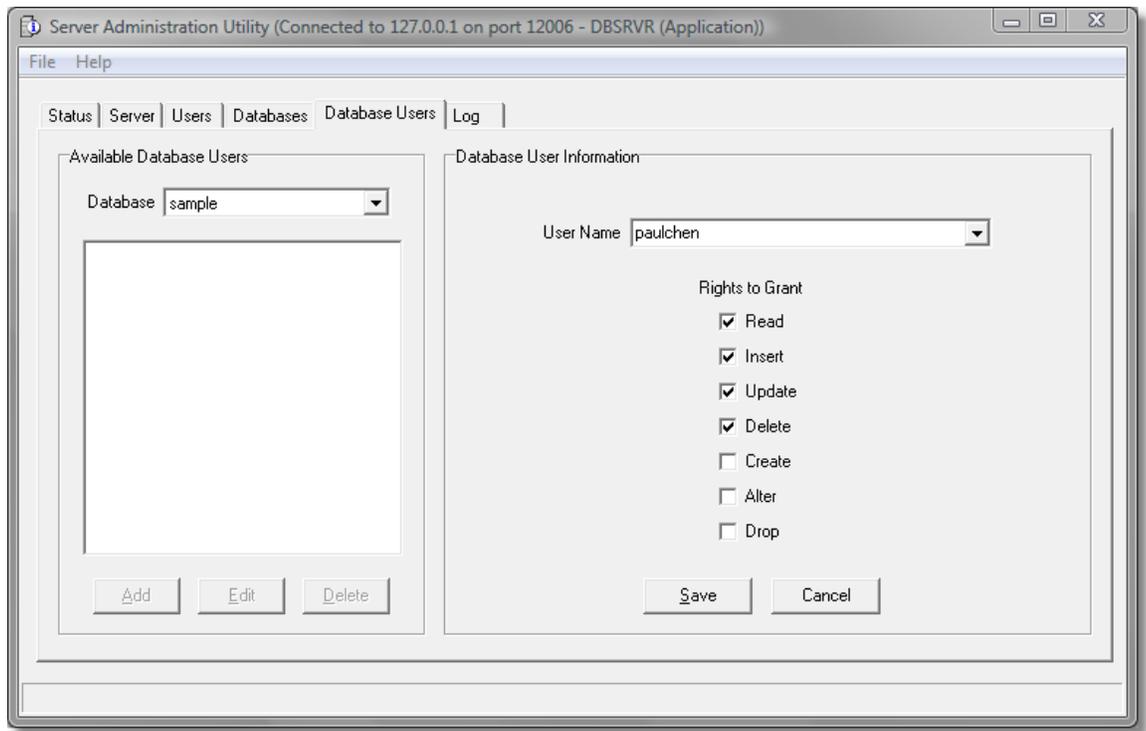


- Next, go to the "Database" tab. Before doing so, you need to ensure that there is a Bibloscape database on the server machine for the remote Bibloscape client to open. You can transfer Bibloscape databases by using WinZip (<http://www.winzip.com>) to compress all files in the Bibloscape database folder into a zip file. Transfer the zip file to the server PC and unzip it. Once you have done this, in srvradmin's "Database" tab, click the "Add" button.



First, give the database a name. You will need this name on the client PC to configure the setup; it can be anything you like (in other words, it doesn't have to have the same name as the \*.bsl file in the database, although it's recommended that it does, for clarity). Click the "Select" button to point to the folder where the database files reside. Then click the "Save" button. Create one database name for each \*.bsl file if you want to publish more than one database. In the next step, you can assign multiple users to a single database created in this step.

7. Then, go to the "Database Users" tab. Select a database from the combo box first. In our case, we'll select the database "sample" we created in the last step. If you have published more than one database, you can choose which database to add a new user to. Then click the "Add" button to add users to this database. Make sure users are given the rights they need. For normal use, you should give users the right to Read, Insert, Update, and Delete. You have the flexibility to give some users only the Read privilege, so the user cannot add, edit, or delete. Or you can just leave the "Delete" out, so the user can add and edit, but cannot delete records. Click the "Save" button to save the changes. Now you can log out from the server by going to "File | Logout from Server".



### Client setup

So far we have successfully set up BiblioRemote server; now we need to go to the client PC and use Biblioscape to create a server connection file (\*.bsr). The Biblioscape end users can then use the \*.bsr file to open the remote database published by the BiblioRemote server.

1. On the client PC, start Biblioscape and go to the menu command "File | Database | Configure Remote Database...".
2. Click the "New" button, select a directory, and give a file name to the configuration file (\*.bsr).

Configure Biblioscape Remote Database Settings

Configuration file

C:\manual\Biblioscape 8\sample\sample.bsr

Configuration settings

Remote IP  Port

Remote Database  Remote Type

User Name  Password

Now you need to fill out the configuration settings. Enter the IP address of the server machine where `dbsrvr.exe` is running. Enter 12005 as the port number. This is the default port number used by the BiblioRemote server. This port is blocked by default in Windows Vista. Click [here](#) to learn how to open a blocked port. If you don't open this port, you cannot open the remote database. Enter the remote database name you created in step 6 of server setup. For the "Remote Type", select "LAN" if the server PC is on the same Local Area Network as the client PC. If the server PC is in another building, city, or country, please select "Internet". Enter the user name you created in step 5 of server setup or use the default Admin account. Enter the password for the account you created. In the \*.bsr file, the password will be encrypted. If you enter the password in the \*.bsr file, the end user will not need to enter the password when opening the \*.bsr file. To be more secure, you can leave the Password field blank. However, the downside of doing this is that each time you open the remote database, you will have to enter the password manually, which can be annoying. If you have the password field entered in the \*.bsr file, the remote database will be opened automatically when you open the \*.bsr file. Click the "Save" button to save the configuration file.

3. Now we have set up the BiblioRemote server by publishing a database and adding an user to that database. We have also created a \*.bsr file in Biblioscape. Next, you can give the \*.bsr file to the end user. In Biblioscape, go to "File | Database | Open Database". Select the \*.bsr file you have just created. The remote database should then be opened.

### Firewall issues

Security software such as Windows Firewall or ZoneAlarm will block all unused ports. If the ports used by BiblioRemote are blocked, you won't be able to access BiblioRemote from other computers. You will need to change the appropriate settings in your security software to unblock these ports. By default, BiblioRemote uses ports 12005 and 12006.

### Running behind a router

If you run BiblioRemote on a computer behind a router and only the router has an IP open to the world, please make sure the two ports 12005 and 12006 are not blocked by the router. Also, configure your router to forward traffic on those two ports to the computer on which BiblioRemote runs. For example, if that computer's IP address is "192.168.0.3", configure the router (this is sometimes called "port forwarding") so that it sends all traffic it receives from the Internet for ports 12005 and 12006 to "192.168.0.3".

### Host name and service name

Note: This section is for advanced users who want to use the host name instead of IP address, and the service name instead of port number. In some cases, when the sever IP address and port number keep changing, it is more convenient to use the host name instead of IP address, and the service name instead of port number. The mapping between host name and IP address is controlled by the Hosts text file available from the client operating system ([http://en.wikipedia.org/wiki/Hosts\\_file](http://en.wikipedia.org/wiki/Hosts_file)). You can add an entry to this file. It will allow you to refer to the server by host name instead of IP address. For example:

```
192.168.0.100      BiblioRemoteServer
```

When your remote machine IP changes, you can just update the hosts file instead of the \*.bsr files. The mapping between service name and port number is also controlled by the Services text file available from the client operating system (<http://support.microsoft.com/kb/832017>). You can add an entry to allow you to refer to the server by service name instead of port number. For example:

```
BiblioRemoteData      12005/tcp
BiblioRemoteAdmin     12006/tcp
```

Once you have added an entry to those two mapping files, you can edit your \*.bsr file. Open the Biblioscape \*.bsr file with a plain text editor like notePad. Add entry "RemoteHost" or "RemoteService" to the \*.bsr file. You can leave the RemoteIP and RemotePort entries untouched. Because RemoteHost takes precedence over RemoteIP, RemoteService takes precedence over RemotePort. For example:

```
[RemoteDB]
RemoteIP=192.168.0.100
```

```
RemoteHost=BiblioRemoteServer
RemotePort=12005
RemoteService=BiblioRemoteData
RemoteUser=smithon
RemotePassword=ž`~š"
RemoteDatabase=sample
RemoteType=LAN
```

Close and save changes to the \*.bsr file. The next time you open the \*.brs file from Biblioscape, the RemoteHost setting will be used instead of the RemoteIP setting, and the RemoteService setting will be used instead of the RemotePort setting.

## 13.2 Running BiblioRemote as a system service

To run the BiblioRemote server as a regular Windows application, you must be logged on to Windows. This has two disadvantages. First, other people can't use the computer because when they log on to their own accounts, BiblioRemote will stop running. Second, you can't leave the computer with no user logged on (as you might wish to, for security reasons), because BiblioRemote will shut down when you log off. To solve this problem, you can run the BiblioRemote server as a Windows service under Windows NT, 2000, XP, and Vista.

### Windows Vista

Click the Windows Start button and type "task scheduler". Select the program "Task Scheduler" to run it. Click "Action | Create Basic Task..." to add a job using the wizard. Give it a name like "BiblioRemote", and a short description. Click "Next". On the "Trigger" tab, select "When the computer starts" under "When do you want the task to start". Click "Next". Under "What action do you want the task to perform", select "Start a program" and click the "Next" button. Click the Browse button to select "dbsrvr.exe" under the BiblioRemote directory of your Biblioscape installation. Click the Next button, and then click the Finish button to create the task. Go to the Task Scheduler main window and double click the task you have just created. Under the "General" tab, check the box "Run whether user is logged on or not". On the "Settings" tab, check off the box "Stop the task after...". Click the OK button. You will be prompted to enter a password. You have to enter a Windows account with admin privilege to make BiblioWeb run at computer startup without logging in. If you do not have the admin privilege, the task will not run until you are logged into Windows. To remove BiblioRemote from scheduled tasks, just delete it from the list.

### Windows 2000/XP

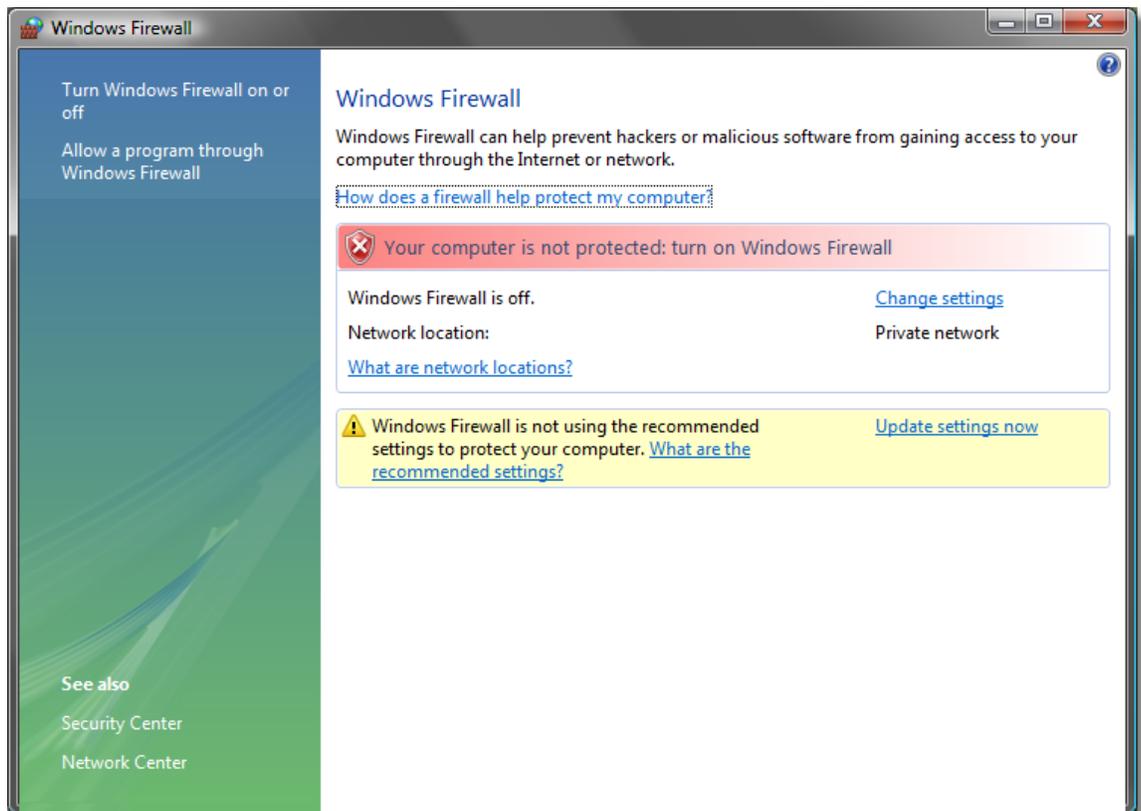
To run the BiblioRemote server as a Windows service, go to "Start | Run...". Click the "Browse" button to find "dbsrvr.exe". At the end of the file path, add " /install", for example: "<installation folder>\BiblioRemote\dbsrvr.exe" /install. Then, click the OK button to install. The service will

automatically start the next time you start your computer. You can also manually start or stop a service by going to Windows "Control Panel | Administrative Tools | Services". The service name is "Bibioscape Database Server - DBSRVR"; right-click on it and select "Start" or "Stop". To remove the BiblioRemote server from your Windows services, first shut down the service by going to Windows "Control Panel | Administrative Tools | Services". Right-click on the service name and select "Stop". When the service has stopped, enter "...\BiblioRemote\dbsrvr.exe" /uninstall under the Windows Run command line as described above.

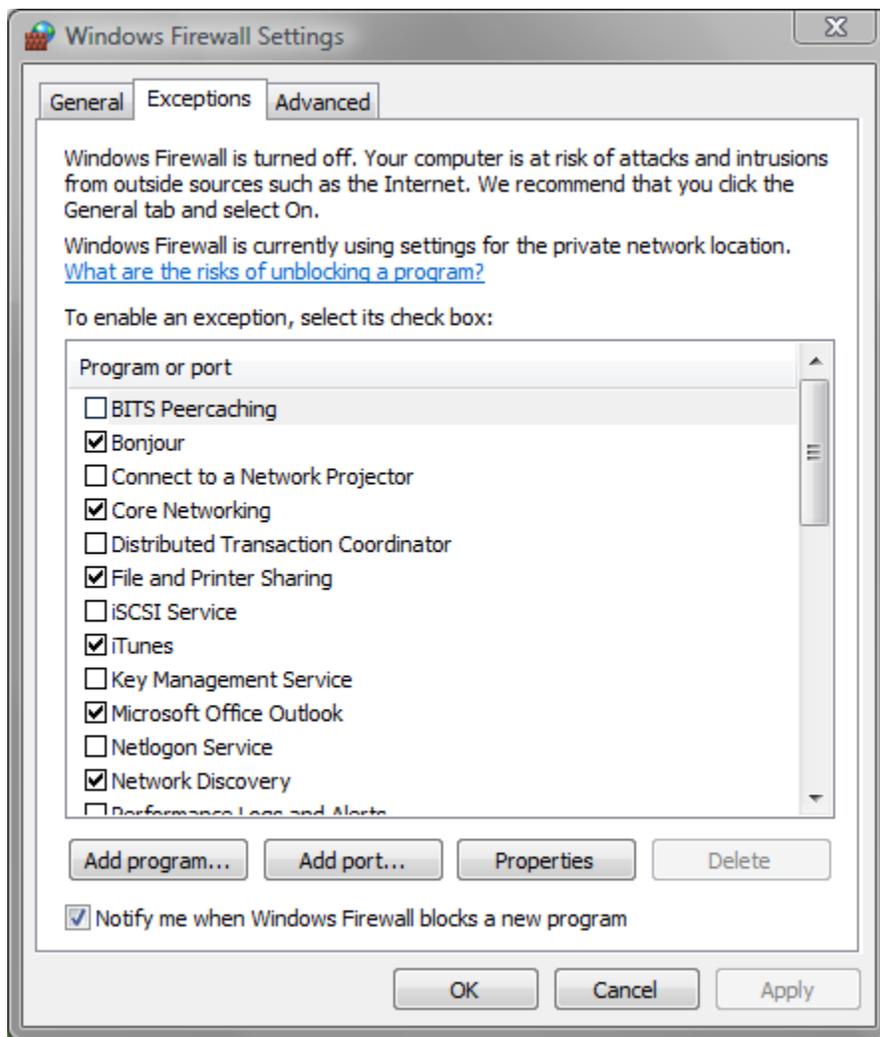
### 13.3 Open a port in Windows firewall

In order to make your computer more secure, Microsoft enables the Windows firewall by default in Windows Vista. This poses a problem if you need to run the BiblioWeb or BiblioRemote servers. The following instructions show how to open the ports needed by BiblioWeb and BiblioRemote in Windows Vista firewall. If you run other security software that blocks Windows ports, please refer to its user manual for how to open a port.

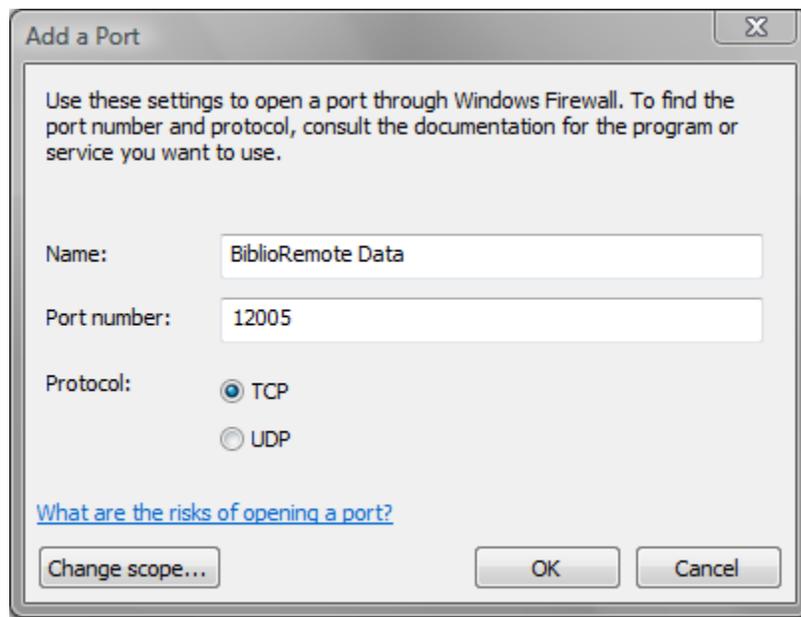
1. In Windows Vista, click the Start button and type "firewall". Select the suggested program "Windows Firewall".



2. On the left pane, click the hyperlink "Allow a program through Windows Firewall".



3. BiblioWeb uses port 80 by default. Click the "Add port..." button. Enter a name like "biblioweb" and port number "80". Chose TCP as the protocol and click the OK button. If you already have a web server using port 80, BiblioWeb will default to port 8001. In that case, enter port 8001 instead. Or, instead, you can click the "Add program..." button and enter the full path to BiblioWeb.exe and click the OK button.
4. BiblioRemote uses ports 12005 and 12006 by default. Click the "Add port..." button. Enter a name such as "biblioremove data" and port number "12005". Chose TCP as the protocol and click the OK button. Click the "Add port..." button again, and enter a name like "biblioremove admin" and port number "12006". Chose TCP as the protocol and click the OK button. Or, you can click the "Add program..." button and enter the full path to "... \BiblioRemote\dbsrvr.exe" and click the OK button.

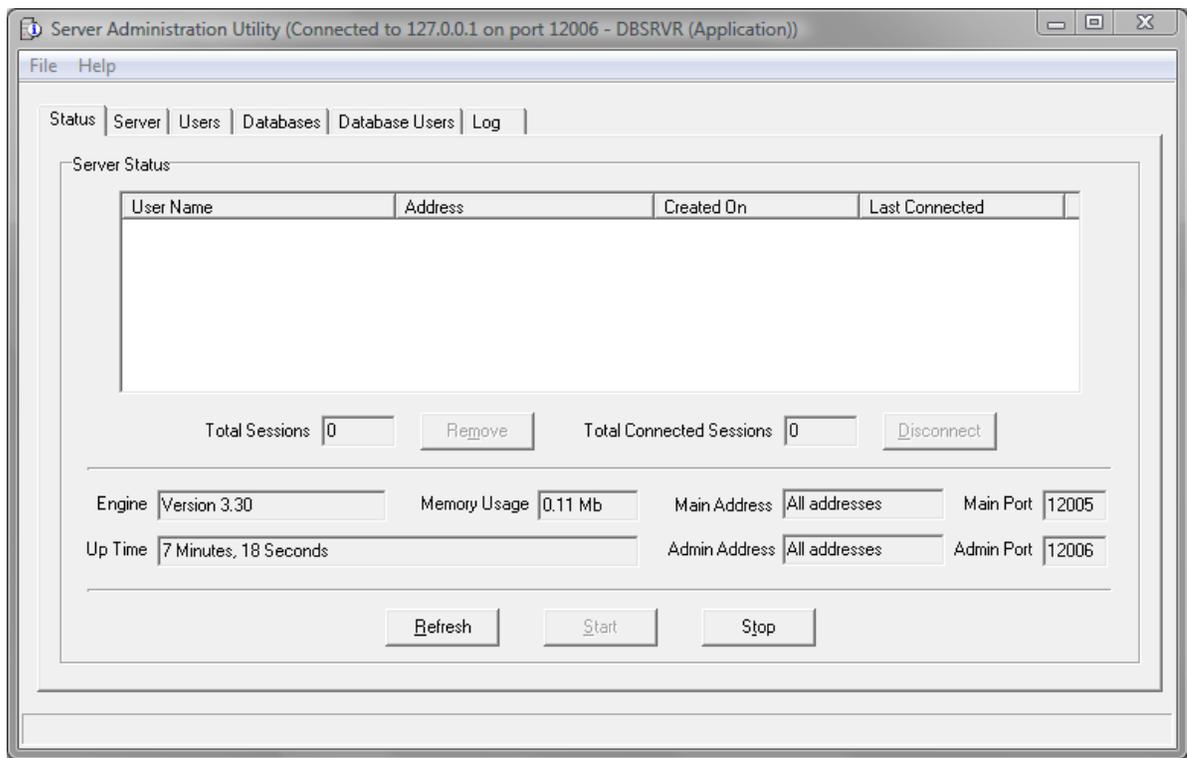


## 13.4 Server administration utility

In the section about setting up the BiblioRemote server, we have used the server administration utility to publish a database and add users. In this section, we will go through the other settings in the server administration utility. Before doing so, be sure to have the BiblioRemote server running by double clicking "...\Biblioscape x\BiblioRemote\dbsrvr.exe". You can also run the BiblioRemote server as a system service. To configure the BiblioRemote server, run "...\Biblioscape x\BiblioRemote\svradmin.exe". When you first run this program, you will need to use the default account to log in (User name: "Admin"; Password: "DBAdmin").

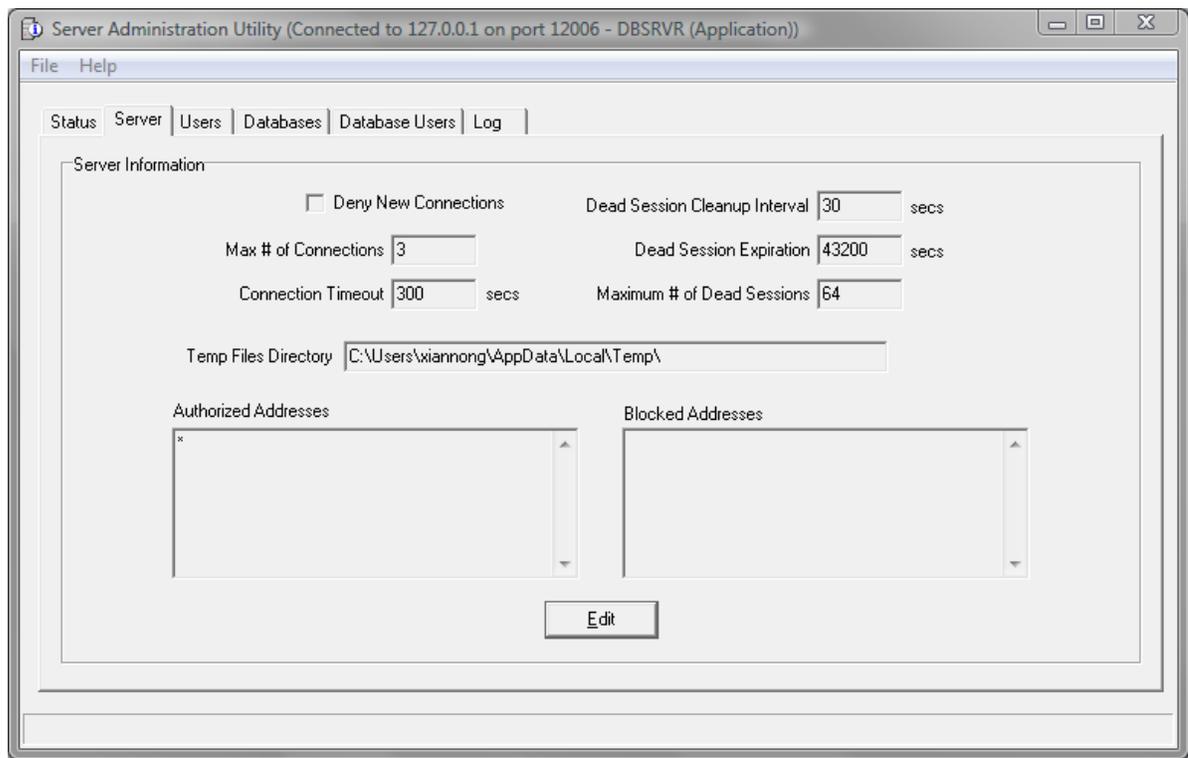
Go to the menu command "File | Options". Select the remote type (Local Area Network or Internet), and enter the IP address of the server. If you are using the computer on which the server is installed, use the default IP address 127.0.0.1. Click "OK". Now go to "File | Login to Server" and use "Admin" as the user name and "DBAdmin" as the password. For security reasons, you may want to remove the default account after establishing existing users and administrators, or at the very least, change the password.

## Status



The Status panel lists all the active sessions currently connected to the server as well as other information like memory usage, up time, etc. By default, the BiblioRemote server uses port 12005 for database communications and port 12006 for administrative communication. You can stop the server by clicking the Stop button, and restart it by clicking the Start button.

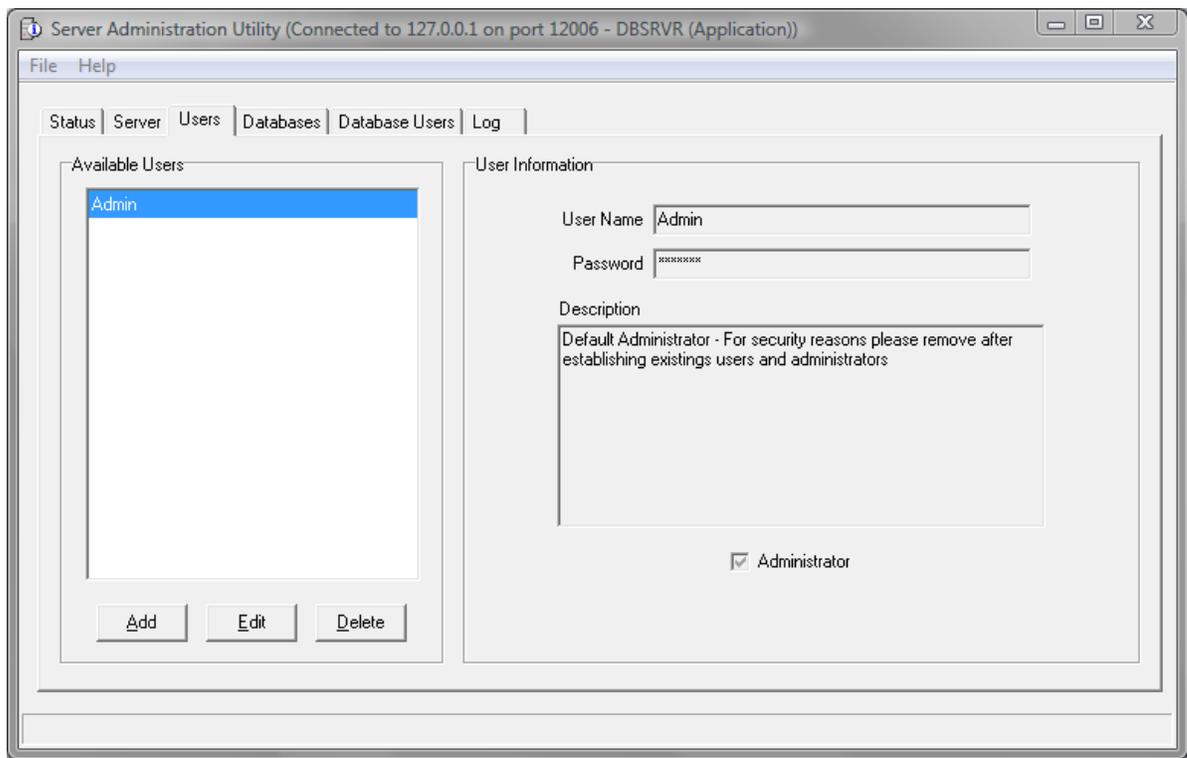
## Server



On this panel, you can change server-related parameters. The most important one is "Max # of connections". By default, it is set to 3. If you need to support more concurrent users, you can go to the Biblioscape web site and purchase additional BiblioRemote server licenses. Then, click on the label "Max # of connections" and enter the key you received. All the other server-related parameters can be changed after clicking on the "Edit" button.

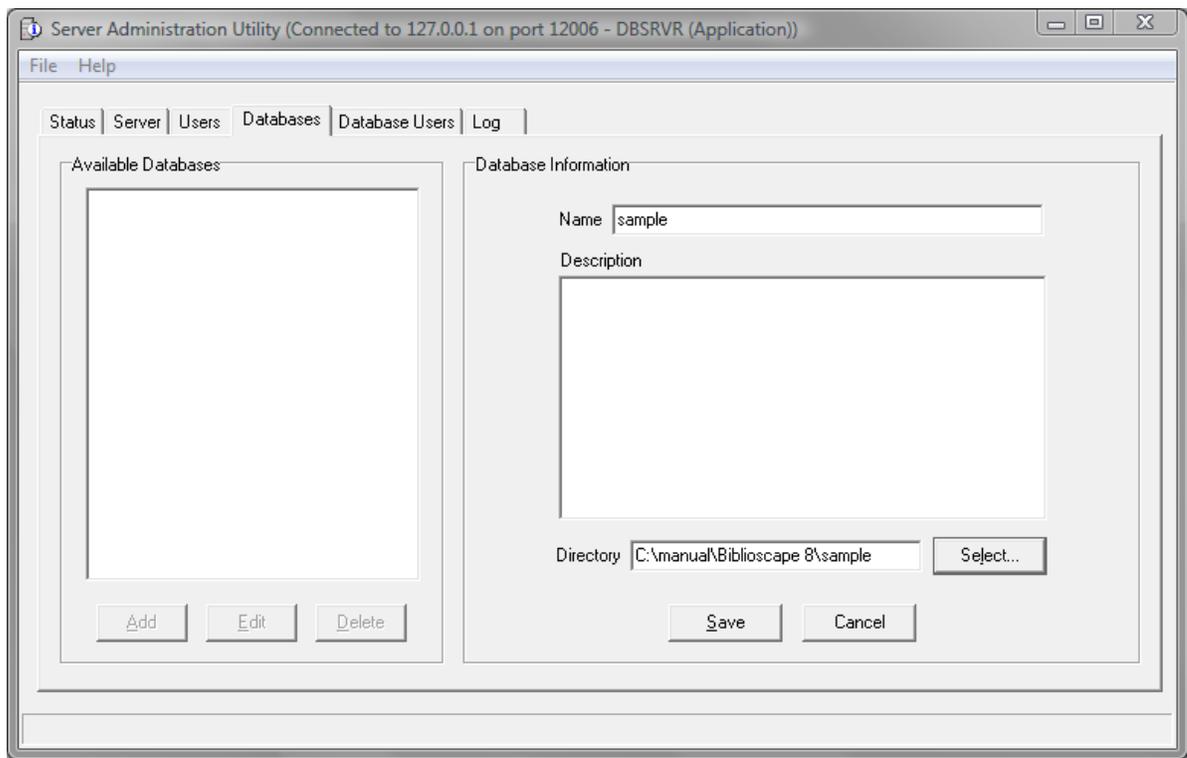
- Deny New Connections: With this box checked, no more users can connect to the server.
- Connection Timeout: If user can't make a successful connection within the indicated time, the user has to reconnect.
- Dead Session Cleanup Interval: BiblioRemote server checks for dead sessions periodically.
- Dead Session Expiration: If an user doesn't reconnect within the time specified, the session will be removed and the user has to log in again.
- Max # of Dead Sessions: The max number of dead sessions allowed.
- Temp File Directory: The folder where temporary files are created.
- Authorized Addresses: The IP addresses allowed to connect to the server. Use \* to allow connections from any IP.
- Blocked Addresses: The IP addresses not allowed to connect to the server.

## Users



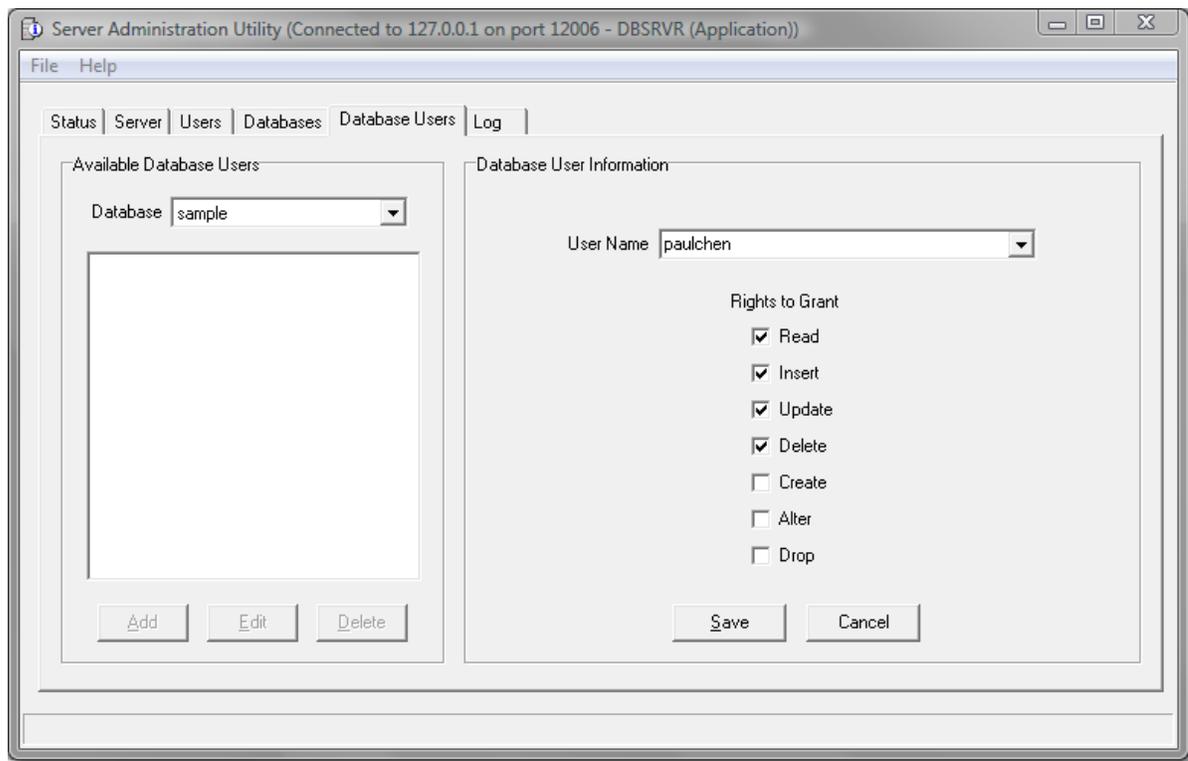
You can add, edit, or delete users on this panel. A user can be given administrator privileges if the "Administrator" box is checked.

## Databases



All available databases published by the server are listed. Click the "Add" button to make your Biblioscape database available. First, give it a name. This name will be used when you set up Biblioscape to access the database on the BiblioRemote server. You can add a description about the database in the Description box. Then, specify the path where the database resides.

## Database Users



You can grant each user specific privileges to access a specific database. Each user can be assigned Read, Insert, Update, Delete, Create, Alter, and Drop privileges to a specific database. In order for an user to open a remote database with Biblioscape, the user must be given the privilege to do so.

### Log

All the server activities are logged. You can load the log by clicking the Load button and save the log as a text file by clicking the "Save" button.

## 13.5 ODBC driver

### What Is an ODBC Driver

ODBC stands for Open DataBase Connectivity. ODBC provides a standardized set of rules for getting information to and from a database. An ODBC driver is a software interface that accepts ODBC standard queries and then passes them through to the specific application, modifying where necessary to account for application specific database structure and format. The functions of a driver are invisible to users and third party applications. From a third party perspective, a standardized ODBC query or update is presented to the database, and a standardized ODBC

response is returned.

#### How Do I Benefit from My ODBC Driver?

Many software applications (such as Biblioscape) use databases to store and retrieve information. The database design is often specific to the application associated with the database. Before the introduction of ODBC, important information might only have been accessible through one application, or via export solutions. The immediate benefit of ODBC is that those applications that support the ODBC standards can access Biblioscape directly through ODBC. They can search and read the data in Biblioscape and even update records in Biblioscape without starting Biblioscape. With the ODBC driver, you can make the Biblioscape database part of a bigger solution in your organization.

#### [More About the Driver](#)

---

The Biblioscape ODBC driver is an ODBC 3 driver, and we've used it successfully with MDAC 2.7 and the following applications:

Crystal Reports 8.5

MS Query (and subsequently mail-merge in Word and external data in Excel) (Office 2000)

MS Access 2000

MS Visio 2000

BDE 5.01

ODBCExpress 5.06/7 (Delphi 5)

ADOExpress (Delphi 5 with update packs)

IIS5 ASP scripts

Visual Basic 6

Visual Studio .NET

- The driver can completely handle all updating of data via SQL statements and the SQLExecute or SQLExecDirect calls, including BLOB data. Parameters are also completely supported, including BLOB parameters.
- The driver provides scrollable cursor support via SQLFetchScroll and SQLExtendedFetch. The only two types of scrollable cursors supported are Static and Dynamic. Keyset-Driven cursors are not supported.
- The driver cannot perform positioned updates using the SQL syntax WHERE CURRENT OF and using the SQLSetCursorName and SQLGetCursorName calls. This functionality is not supported in the database engine.

- Even though the driver supports parameter arrays, you still cannot request multiple result sets with the SQLMoreResults call. This is not supported by the database engine. You will, however, be able to execute multiple INSERT, UPDATE, or DELETE statements.

### How to Get it

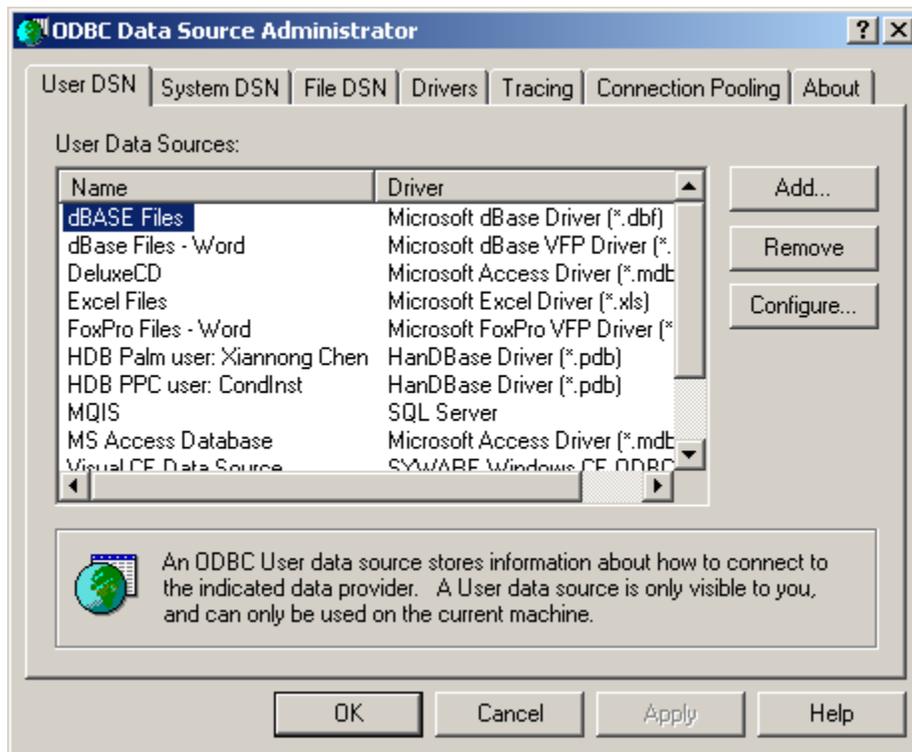
You can purchase the ODBC driver for \$99. [Click here to purchase it online](#). A separate help file is included in ODBC installation.

### How to use the ODBC driver

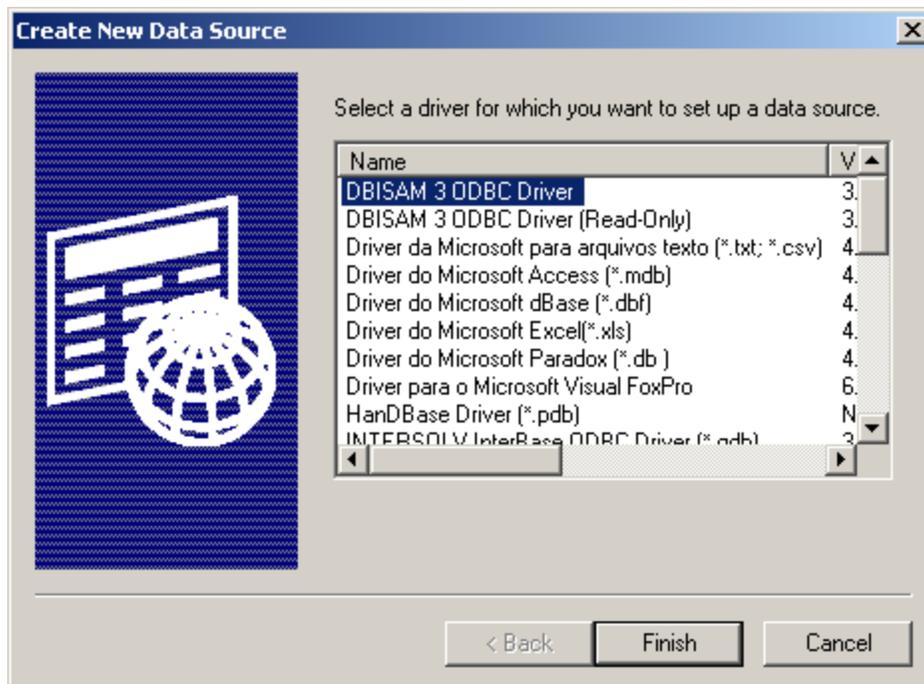
---

To use the ODBC driver, you have to install the driver first. After purchasing the driver, you can double click the installation file to install. Second, you need to set up an ODBC data source. The data source can point to a local database on your computer, or a remote database published by the BiblioRemote server. This makes it possible to access a remote Biblioscape database from other applications. If you need to integrate the Biblioscape database with other information, being able to access a remote data source is very important. Once the ODBC data source is set up, you can access and consume Biblioscape data inside another application. The following section shows you the steps to create a Biblioscape ODBC data source in detail.

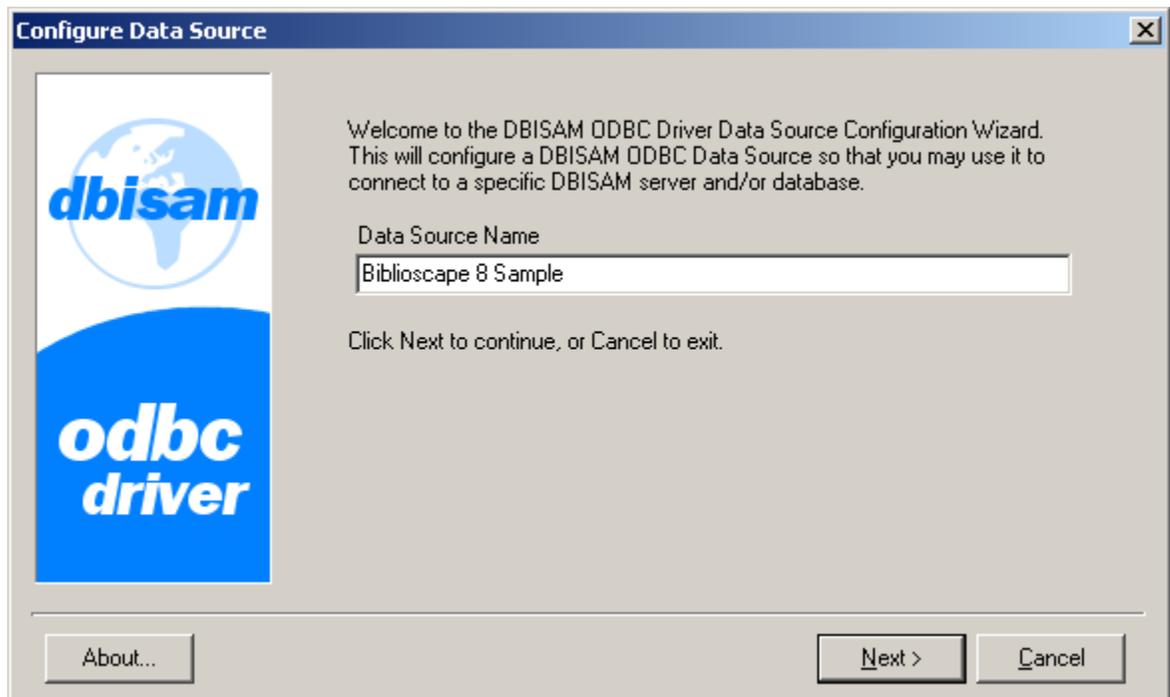
1. Open your Windows Control Panel by going to "Start | Control Panel".
2. In the Windows Control Panel, go to "System and Maintenance | Administrative Tools | Data Sources (ODBC)".
3. Under the "User DSN" tab, click the "Add..." button to add a new data source.



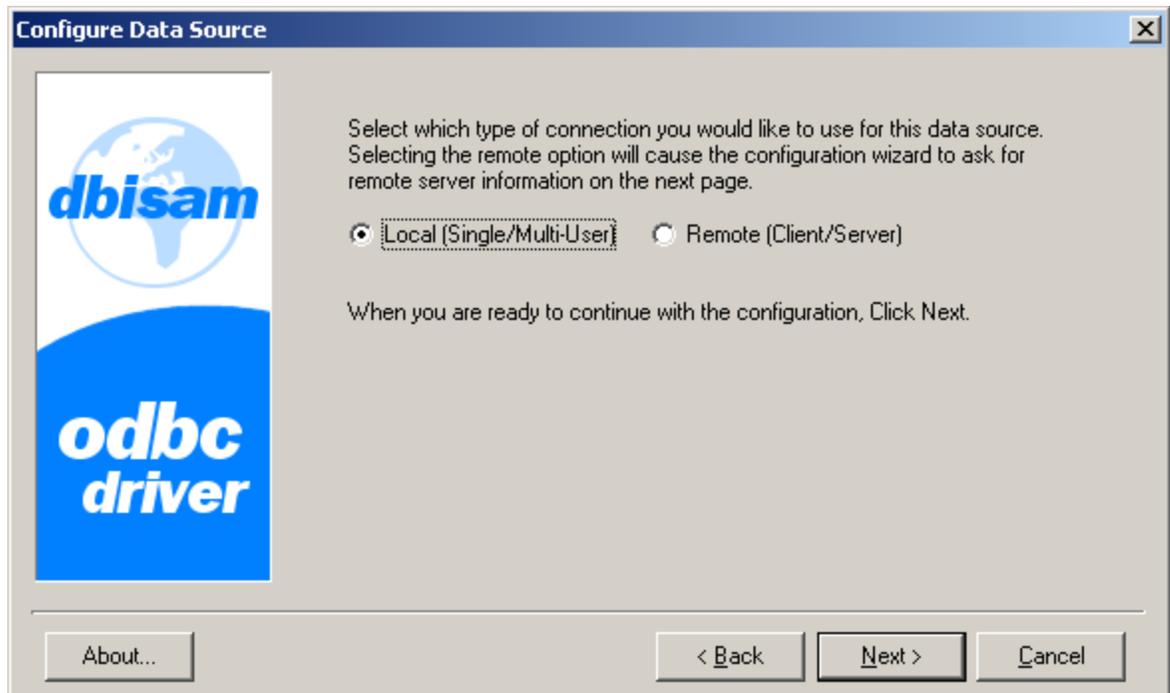
4. Select "DBISAM 3 ODBC Driver" and click "Finish". You can create a read-only data source by selecting the driver "DBISAM 3 ODBC Driver (Read-Only)".



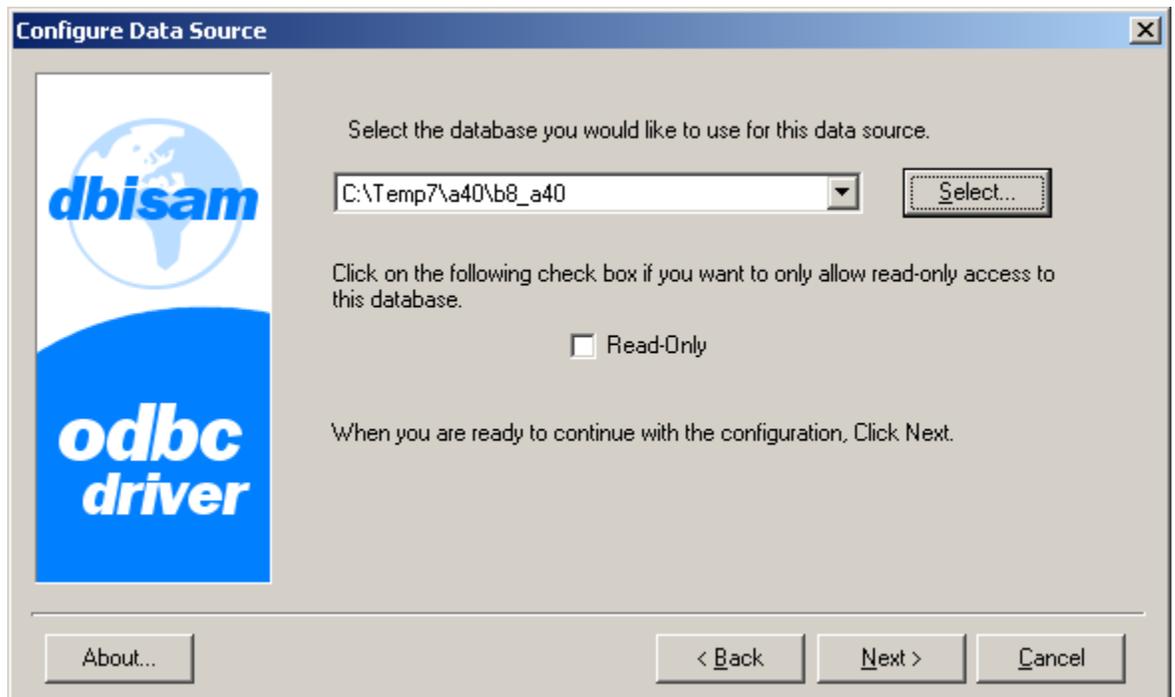
5. Now, we need to go through the data source configuration steps. First, give the data source a name.



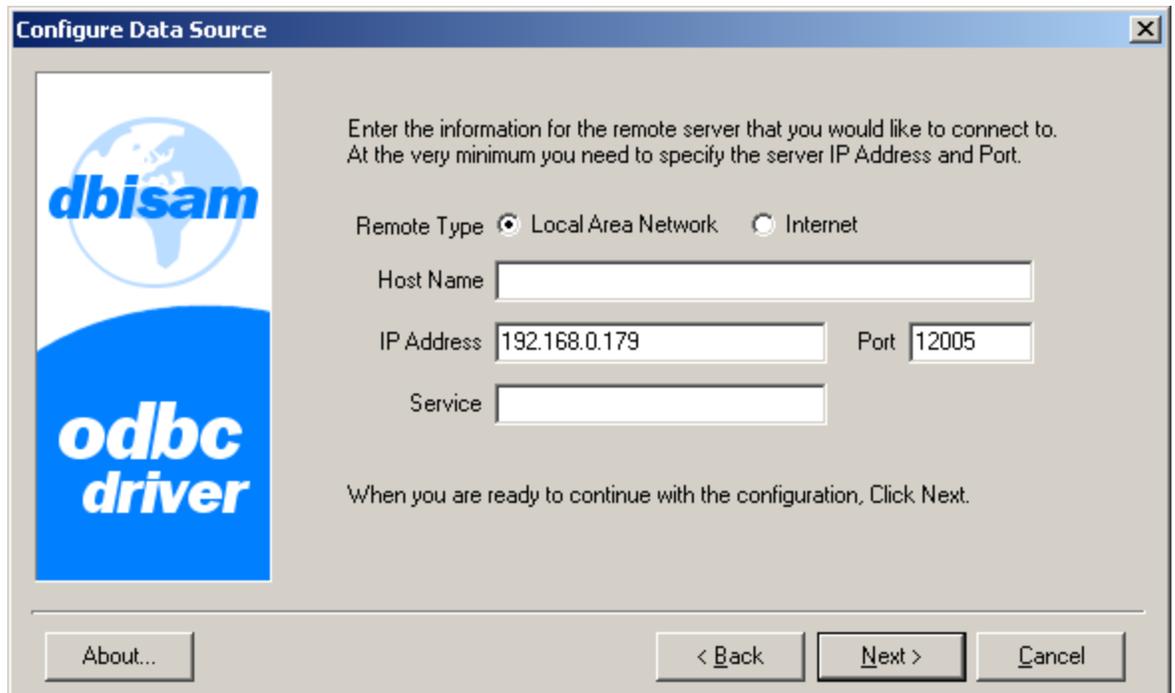
6. You can choose to connect to a local database or a remote database published by the BiblioRemote server. If you choose a local database, you need to give the database path in the next step. If you choose to connect to a remote database, you need to provide the remote database connection parameters.



7. If you choose the local database, click the "Select" button and select your local Biblioscape database folder.



If you chose a remote database, provide the connection parameters. If the remote database is on your LAN, chose Local Area Network. If the remote database is in another place, chose Internet. Enter the IP address and port number. Click here to learn more about connecting to a remote database. For Vista users, you need to have the port opened.



Next, you need to enter the "User Name" and "Password" for the remote database connection.

**Configure Data Source**

Enter any desired default user information here. The default user name and password will be used when accessing a remote DBISAM database server.

User Name

Password

Enter the default remote read-ahead (in number of records) to use for forward-only cursors that use a rowset size of 1.

Remote Read-Ahead  records

When you are ready to continue with the configuration, Click Next.

About... < Back Next > Cancel

In this step, you need to select a database that is published on the BiblioRemote server.

**Configure Data Source**

Select the database you would like to use for this data source.

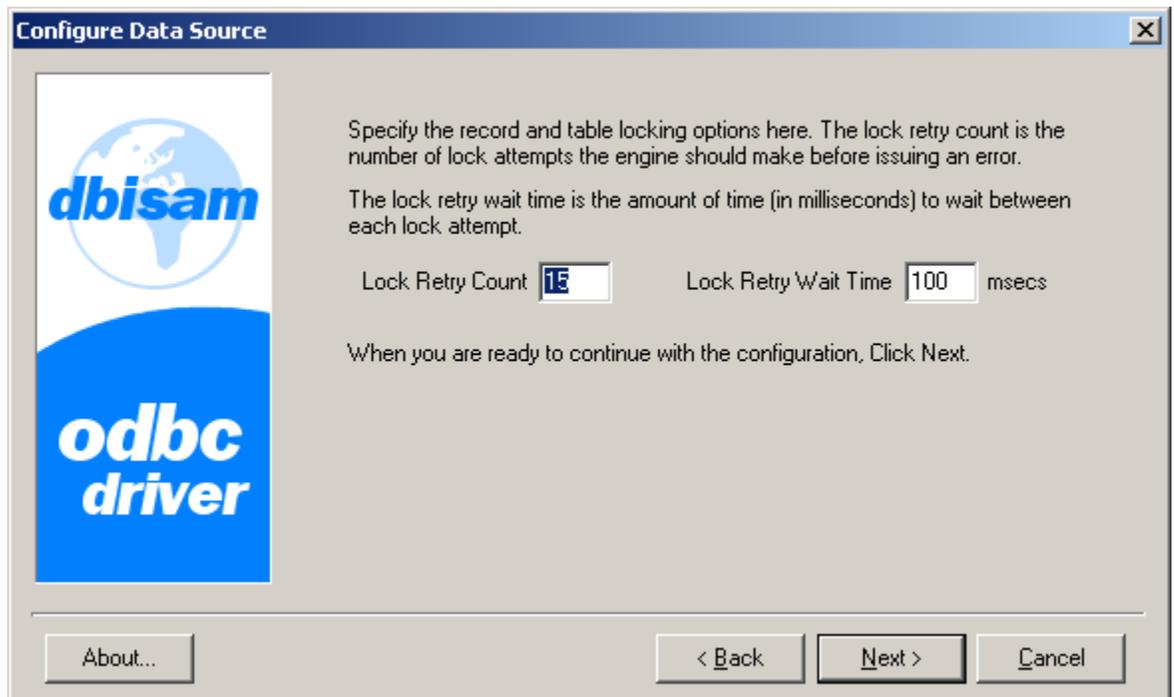
Click on the following check box if you want to only allow read-only access to this database.

Read-Only

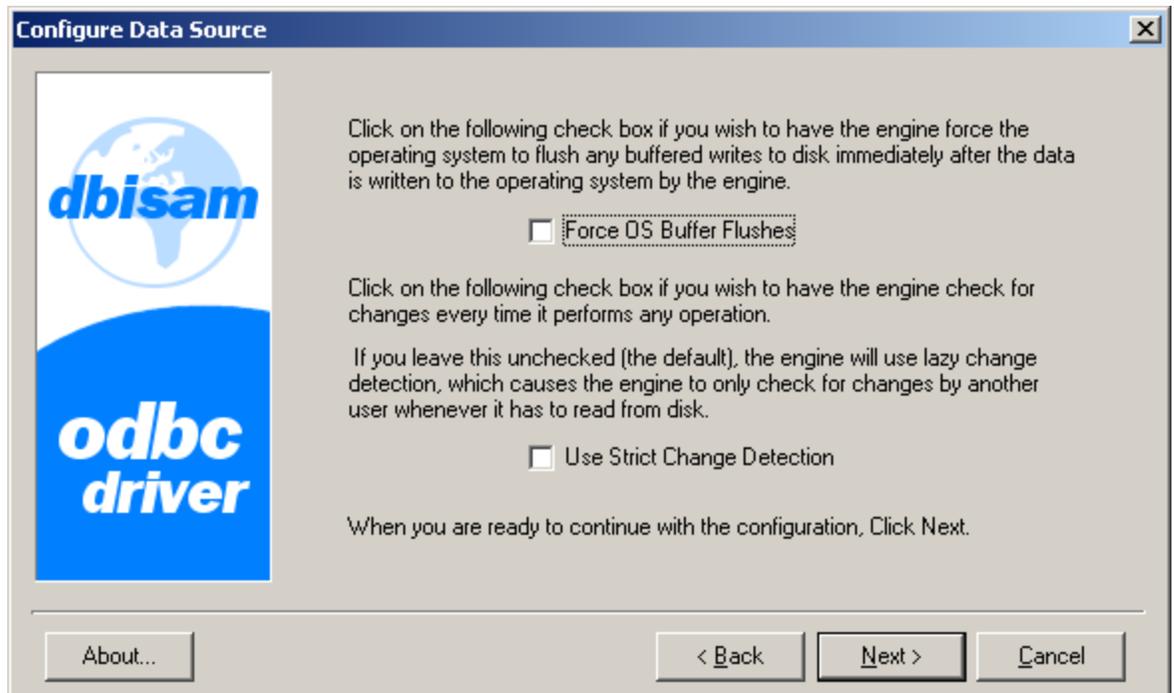
When you are ready to continue with the configuration, Click Next.

About... < Back Next > Cancel

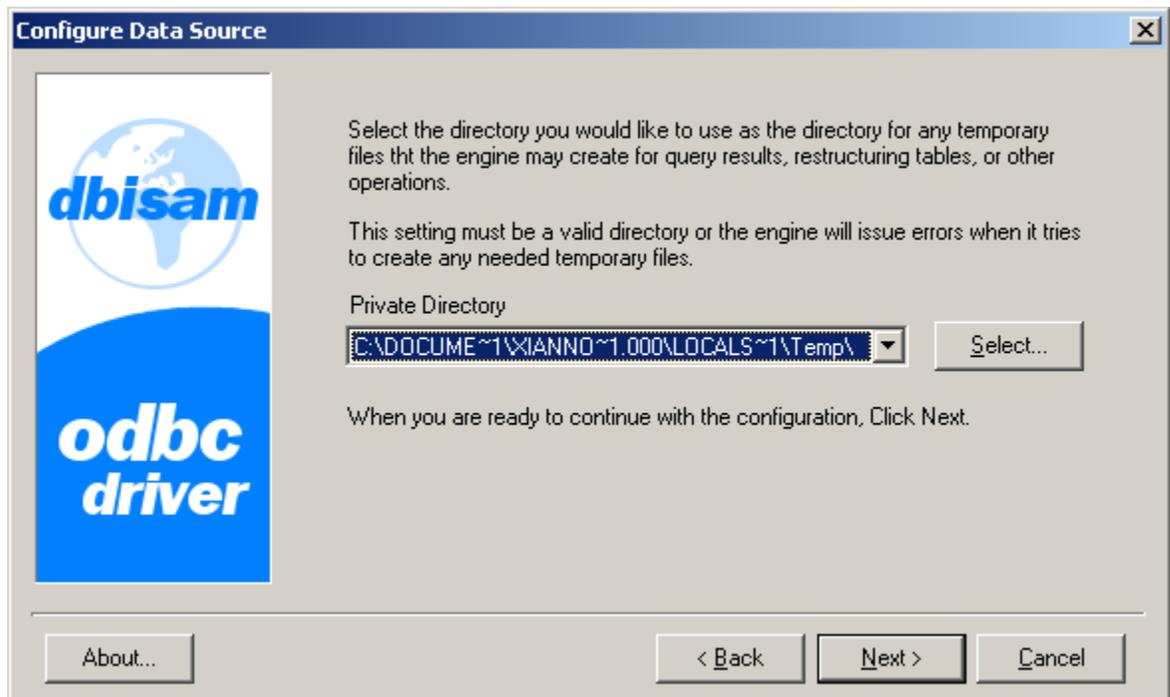
- The following steps are shared by both local and remote database connections. You need to specify the record and table locking options. You can leave the number unchanged.



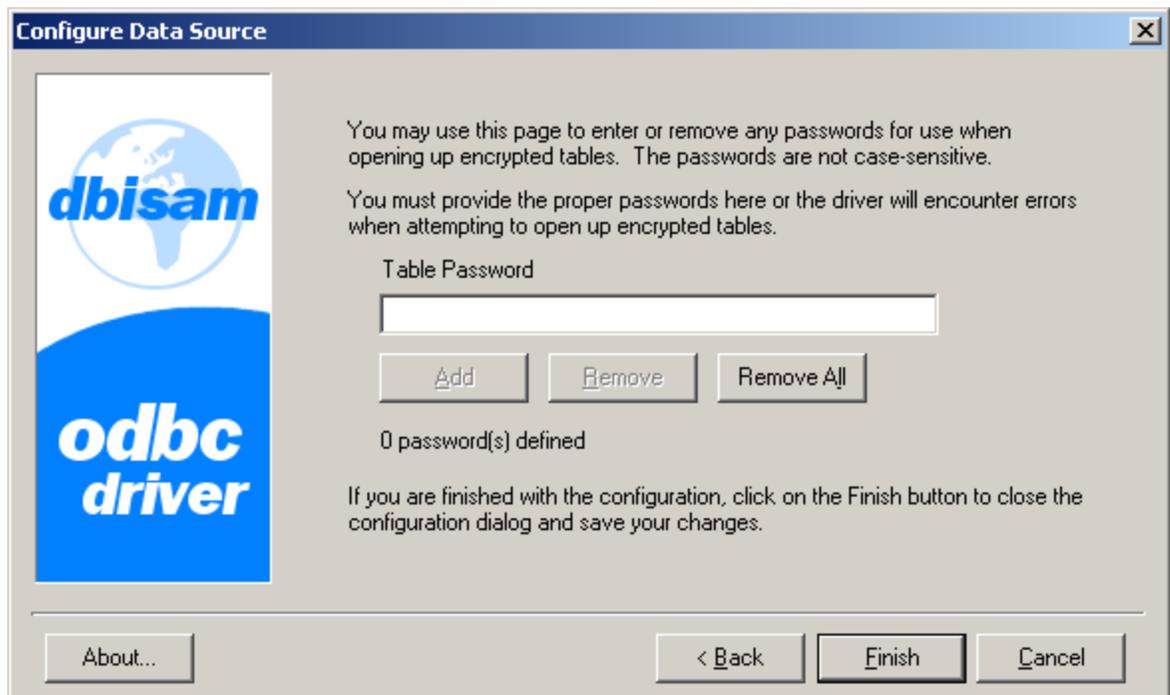
9. You can chose to let the ODBC driver write every change to your database immediately without caching. The advantage is: if your computer crashes, all your changes in the current session will not be lost. The disadvantage is: the database performance will be slower.



10. You need to select a temporary folder for the ODBC driver. You can leave the default one unchanged.



11. In the last step, you can provide a password in case your database is password protected. You can also leave it blank. Click the "Finish" button to create the ODBC data source.





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