Biblioscape 9 - User Manual

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Research Information Manager

Biblioscape User Manual

Research Information Manager

by CG Information

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

Biblioscape 9 - User Manual

Printed: November 2011 in Atlanta, Georgia, USA

Special thanks to:

All Biblioscape users who have sent us feedback. Your bug reports and feature suggestions are one of the main driving forces for each major upgrade. Special thanks to Hugh Gunz and Ians Welton for their long time contribution to the development of Biblioscape.

Last but not least, we want to thank EC Software who wrote this great help tool called HELP & MANUAL which printed this document.

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Foreword

Biblioscape 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

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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 9 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, and categories. 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 six modules: References, Notes, Categories, Tasks, Charts, 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.

Project	#
⊞ 📁 Places	
⊟ 📁 Folder	
📗 References	
🗒 Notes	
📅 Tasks	
📊 Charts	
🏷 Categories	
📁 Collection	
⊞ 📁 Smart Collection	
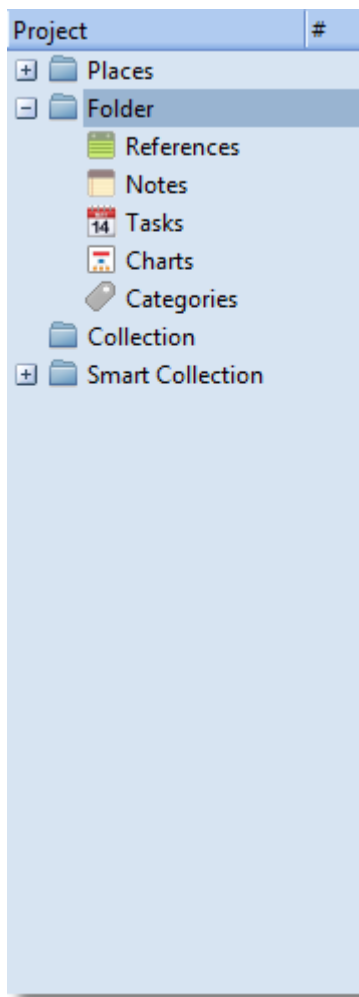
- The References module is used to capture and manage bibliographic references. Bibliographic records from different sources can be imported into a Biblioscape database with the right import filter. References are stored in folders, organized using collections, and tagged by categories. Biblioscape will convert your temporary citations into formatted citations and bibliographies according to you r 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. You can assemble notes into an outline. The writing structure can be easily re-arranged with drag and drop. Upon completion, Biblioscape can automatically generate a final draft with a Table of Contents, formatted citations and a bibliography, a suggested reading list, a glossary, and an index. This makes a big writing project like theses and books more manageable compared to have your whole writing saved in a single word document.

- 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 Biblioscape.

- 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.

Biblioscape 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   Biblioscape performance

Biblioscape 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. Biblioscape 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 Biblioscape 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 Biblioscape is designed for

Biblioscape 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 Biblioscape. As they have just started their research career without much legacy data, putting all their research related data in a single Biblioscape 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   Biblioscape 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?

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

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.

Biblioscape workflow
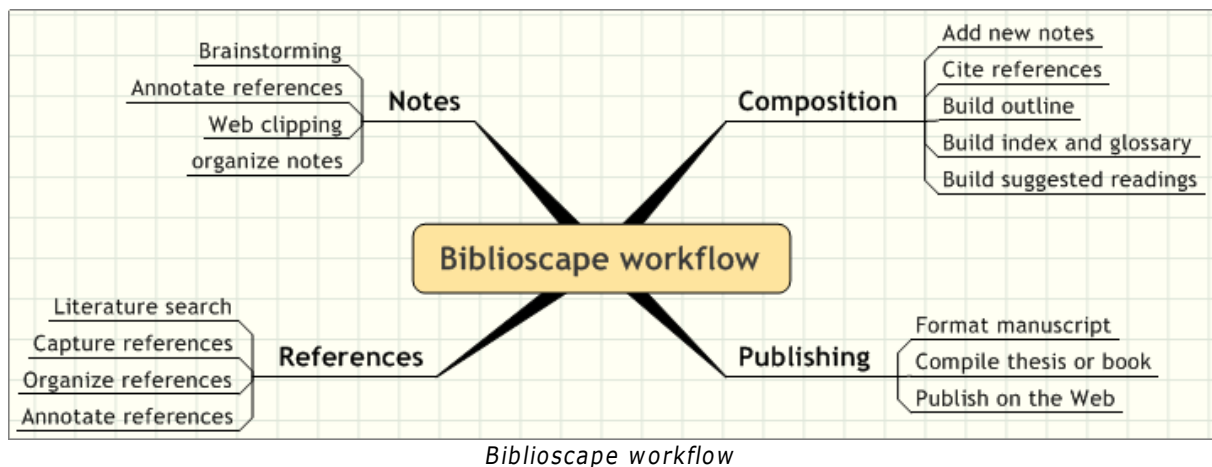
1. Collect: References are collected mainly by Internet search. Biblioscape allows users to search 2,700 plus university and public libraries, as well as commercial citation databases, while the search results are directly captured in your database. Users can also search in a web browser and use EndNote 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 Biblioscape temporary citations whenever you need to cite a reference. Before submitting to a publisher, Biblioscape 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   What's new in Biblioscape 9

Biblioscape 9 is the most important upgrade since version 4. Under the hood, a new database engine has replaced the second generation database engine in use since version 5. The new database engine supports Unicode. You can now have records in English, French, Russian, Chinese, Japanese, etc. all in the same database. An easy to use database backup and restore system is introduced. You can now backup your entire database with a single click. If something terrible happened, you can choose to restore to one of your backups easily. The main goal of version 9 is to improve the usability. The old interface is replaced with a clean and modern interface that is much easier to use. Microsoft Office Ribbon menu is used to make commands more accessible. The following is a list of the main changes

happened in version 9.

- Unicode support is finally added to Biblioscape. You can have records in all the major languages in the same database.

- A complete re-design of BiblioWeb. You can now control database web access privilege at the folder level. The new BiblioWeb has a simple and clean user interface and works well on browsers of modern smart phones and tablet computers.

- Social network features are added in BiblioWeb to promote collaboration. Online users can form groups, add comments to references and notes, leave messages on your connection's home page, share a references or notes collection, etc.

- Database backup and restore. Users can backup database manually with a single click or let Biblioscape run backup automatically after a certain number of session runs.

- Interface changes. Microsoft Ribbon menu replaced the traditional menus and toolbars.

- A new built-in PDF viewer that supports non-destructive annotation is added to the references module. You can also import your PDF files into Biblioscape database. Biblioscape will try to add the bibliographic meta data automatically.
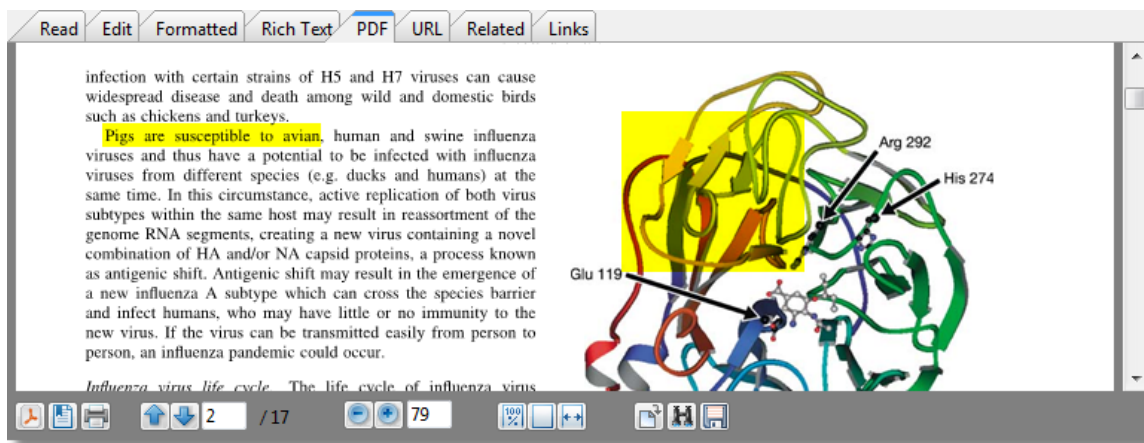
- Features of the composition module has been merged into the notes module. You no longer needs to create a composition project in order to compiles your notes.
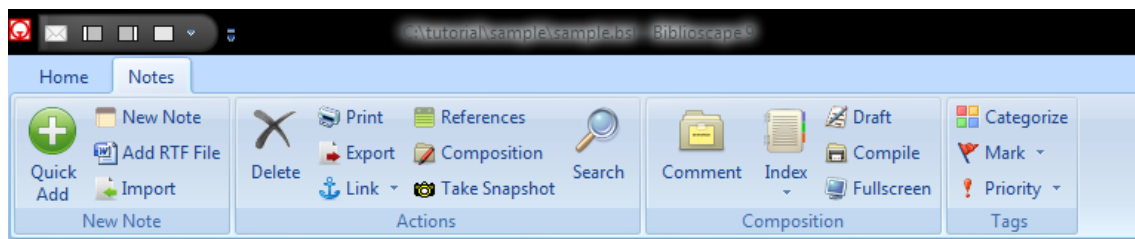
The history of Biblioscape

Biblioscape was first released at the beginning of 1998. For the first 3 major releases, Biblioscape 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. Biblioscape 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, Biblioscape 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 involves lots of architectural changes. 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. Besides Unicode support, Biblioscape 9 improvements concentrate on the area of usability. The learning curve is lowered. The user interface becomes prettier, and it takes less steps to have things done.

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

1. Create a new folder on your hard drive. We call this the "installation folder". If you have Windows 7 or Vista, do not create this folder under "C:\Program Files\" because Windows does not allow installed programs to write files under this folder. We recommend you create the installation folder at "C:\Biblioscape 9\".

2. After downloading the Biblioscape installation file "bsp9.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, 7

Windows Vista or Windows 7 are 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 9\" folder because Windows won't let Biblioscape write files in sub-folders of "C:\Program Files\Biblioscape 9\". You must put the installation folder in a place over which you have full control, for example, "C:\Biblioscape 9\" or "C:\manual\biblioscape 9\". 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

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 9\". 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

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 9\", "c:\Biblioscape 9\", "c"\my downloads\", or "My Documents".

System Requirements

Biblioscape runs only under Windows 95, 98, Millennium, NT 4, 2000, XP, Vista, and 7. It also runs under 64 bit Vista and 7. Users have run it under virtual machines on Linux or Mac OS X 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 during the trial period.

Creating a shortcut

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 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

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

If you have Microsoft Word 6, 7, 97, 2000, 2003, or 2007 on you 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

Several WordPerfect macros are installed in the "...\Biblioscape 9\Tools\" folder. To run these macros, please go to the menu command "Tools | Macros | Play..." in WordPerfect. Go 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, this won't be a problem -- it is unlikely that you will use the same public computer to run Biblioscape more times than the trial copy allowed.

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 VMware Fusion.

Linux

Users have reported running Biblioscape successfully under Linux WINE.

iPad

You can also use Biblioscape on an iPad under remote desktop applications. There are many

remote desktop apps on iPad to choose from. We have tested Slashtop Remote (http://www. splashtop.com/remote) with Biblioscape. First, you need to download and install the remote server application and install it on your PC. This server application is free. Next, go to the App Store on your iPad and search for splashtop. The application cost around $5. Once you purchased it, you can see your remote desktop PC listed if your iPad and the desktop PC are on the same local network. To access your remote desktop on the internet, you need to first make sure the ports used by Splashtop server are not blocked and then enter the IP address. Once Splashtop runs on your iPad, you can control your PC using your iPad with fingers.

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 monthly basis. After a major upgrade is stabilized, you will see less minor upgrades released. 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

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

From version 9, minor upgrades are performed by Biblioscape automatically. You can manually check if a new upgrade is available by clicking the "Update" button on the "Home" menu tab. Or you can let Biblioscape do the checking by itself periodically. When a new minor upgrade is available, it will be downloaded and installed automatically.

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 generate 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 "Home | 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

- The References module is for storing, managing, and searching for bibliographic records. 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

- 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

- 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 folders. You can draw a chart to express ideas and procedures in your research, and link objects in your chart to other modules in Biblioscape.

Web modules

- 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 Biblioscape database. Besides capturing bibliographic records, you can also use the Internet module to capture web pages.

- Biblioscape 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

- 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

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Manage your PDF collection If you have a collection of papers in PDF format, they can easily be added into your Biblioscape database. Biblioscape will search the internet and add the meta-data (Authors, Title, Year, etc.) automatically. The text of your PDF file can be extracted and made searchable inside Biblioscape
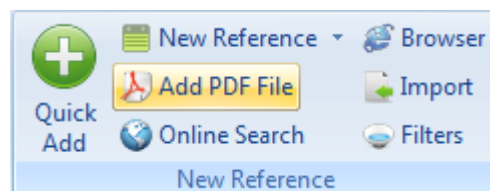
Capture references from the web Search references on the web and capture the records into your references collection with one click. You can capture references from Google scholar, as well as sites that support Direct Export.
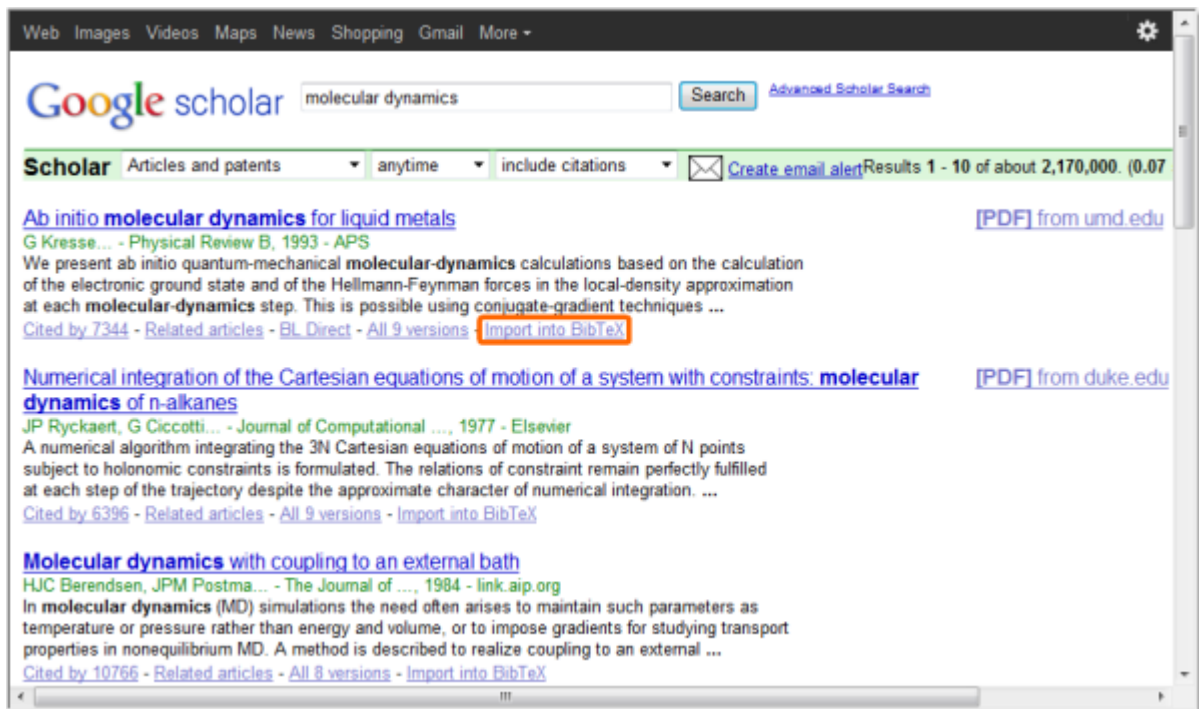
Reference QuickAdd Quickly add a reference by typing the author name, year, and a few keywords.

Search library catalog Search against your university library catalog and have the results automatically captured into your database. 2,700 libraries are included and more can be added.
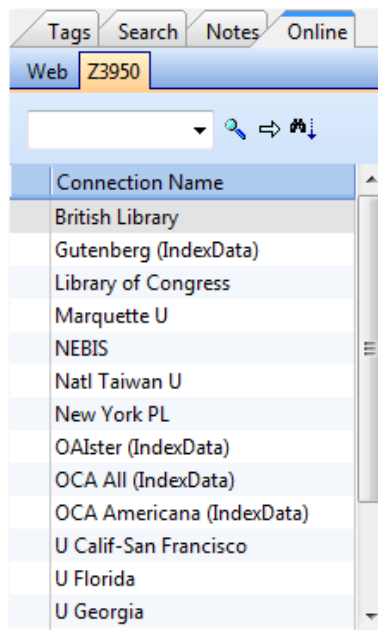
Taking notes Take notes while reading full text inside Biblioscape. The annotation is non-destructive. Your PDF file is not modified at all. All the notes are saved inside Biblioscape database and is searchable and reusable in other writings.
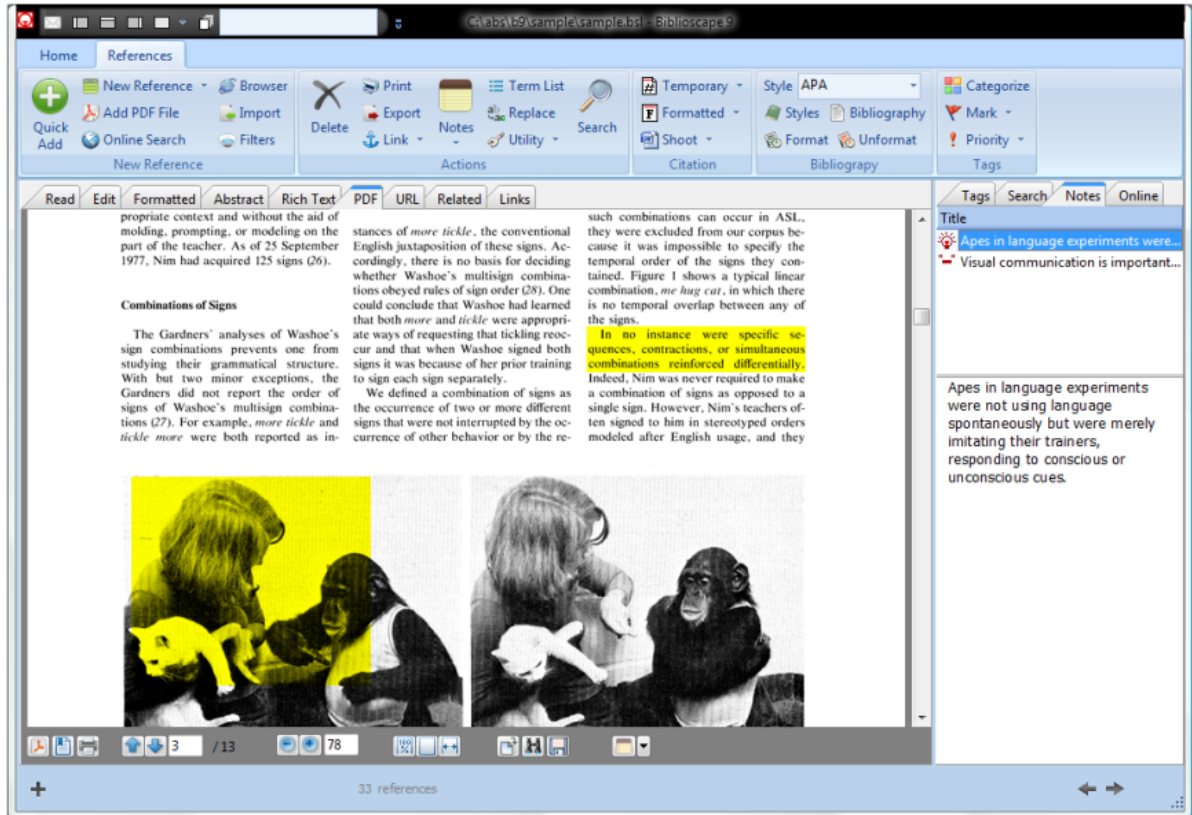
Generate a bibliography Biblioscape comes with more than 1,000 pre-built styles for all major journal publications, as well as popular styles such as APA, MLA, Harvard, Chicago, etc. It can work with any word processor to generate formatted citations and a bibliography.
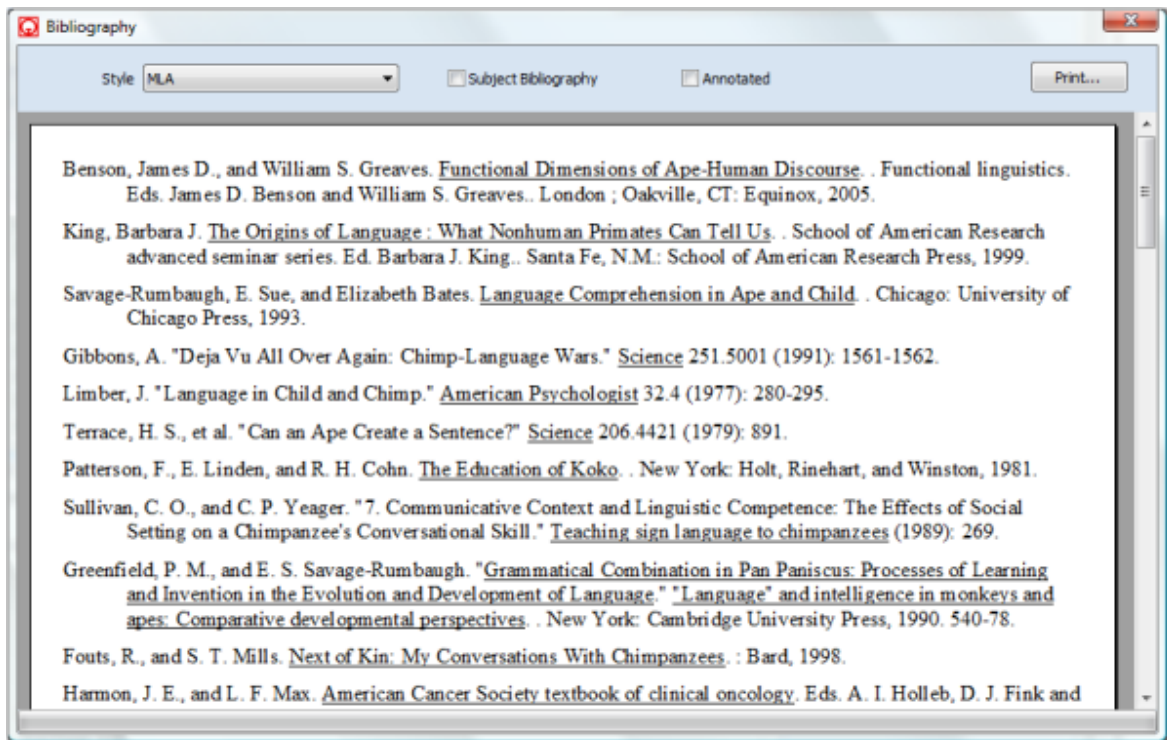
Tagging references Use categories to tag references and to organize references in many dimensions.
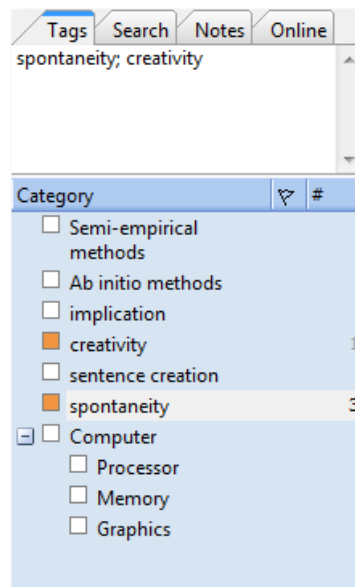
1.4.2   Notes module

Note snapshot Take a snapshot of a note before making changes. You can roll back to an earlier version at any time.
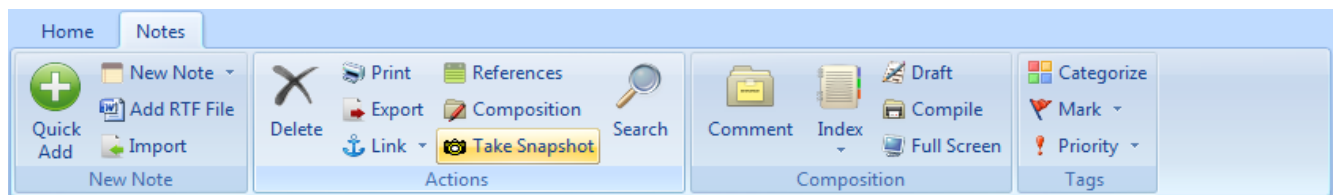
Capture notes from the web While doing research in the integrated Biblioscape web browser, you can capture a web page as a Biblioscape note and make it searchable inside Biblioscape.
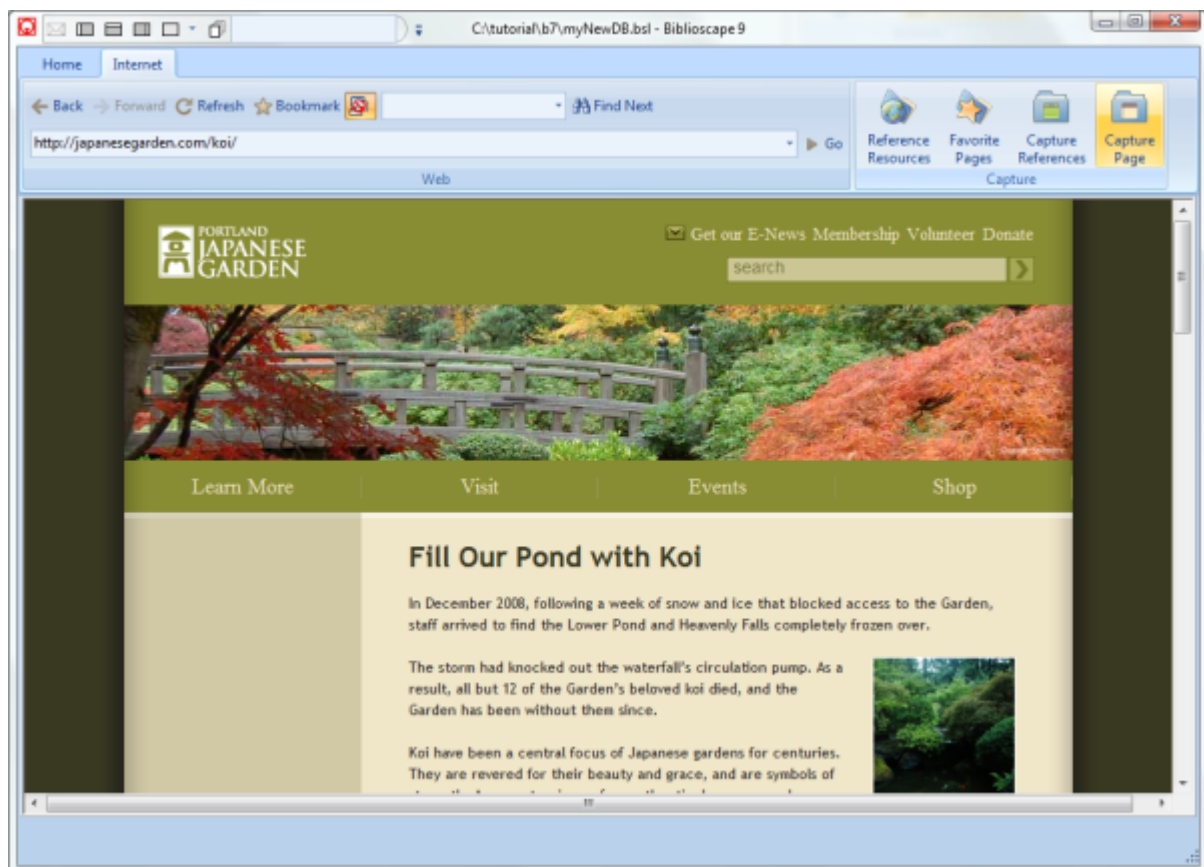
Note QuickAdd Capture your ideas continuously in a brainstorm session.

Find references Search references on the side of your note, then drag drop found references into your note to cite.

Academic writing While writing a book or thesis, you can break your project down into more manageable pieces with references and supplementary material on the side. You can also write comments about your writings.

Compile notes When you are ready, click the Compile button to turn your notes into a single document with a table of contents, index, formatted citations and bibliography all generated by Biblioscape.
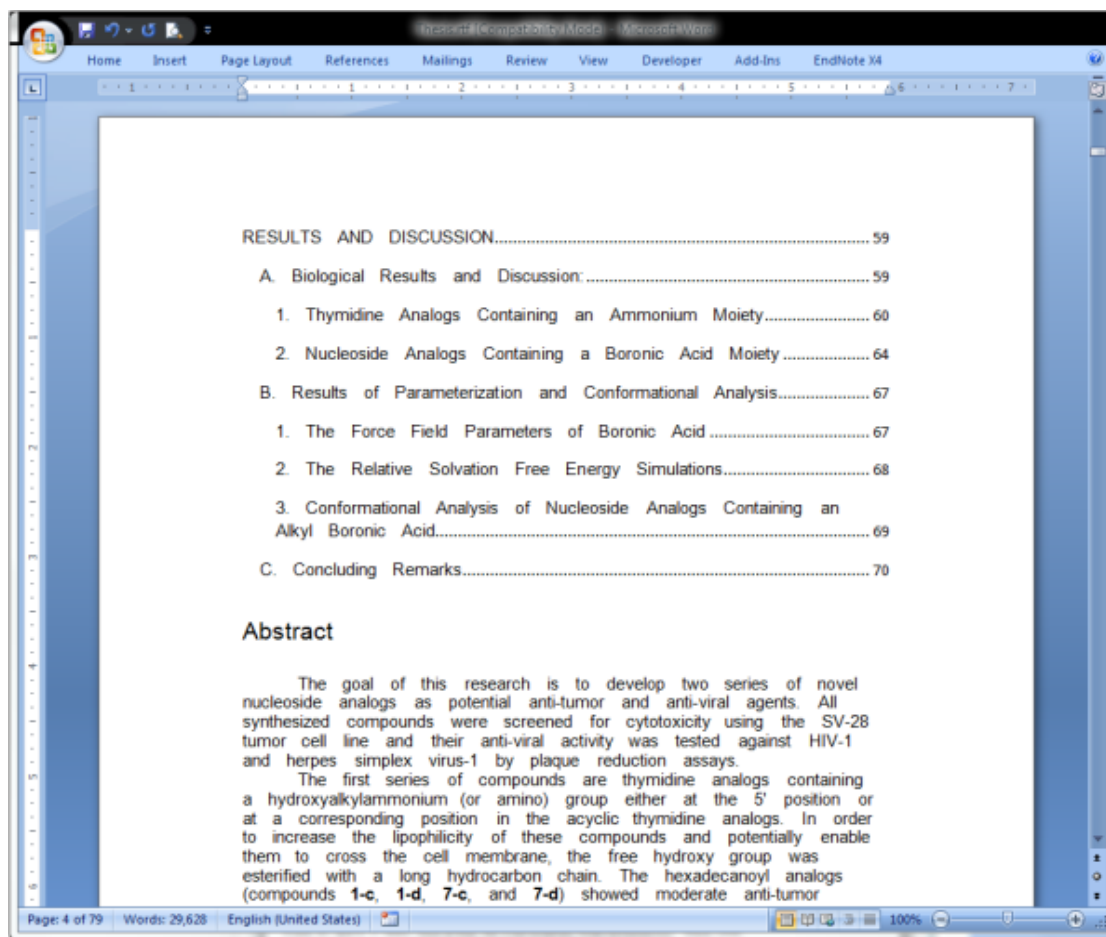
Composition Setting a target date and word count, collecting supplementary material, and writing comments are all possible under the Composition tab.
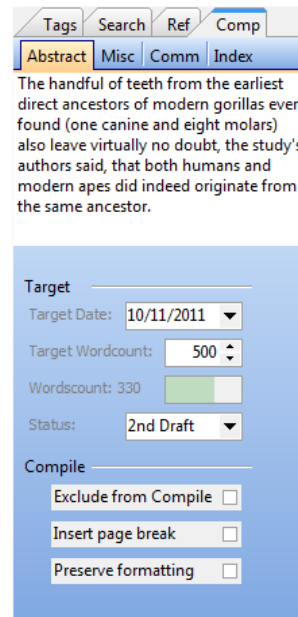
1.4.3 Categories module

Categories list Create a list of categories and use them to tag references, notes, etc. All tagged references and notes are shown under the "Tagged" tab in the list view.

Create links Use a category to represent a concept and to link the concept to references, notes, web site, files, etc. to build a knowledge base.

Tagging records with categories Click the check box to tag records or drag drop references and notes into a category on the right

.
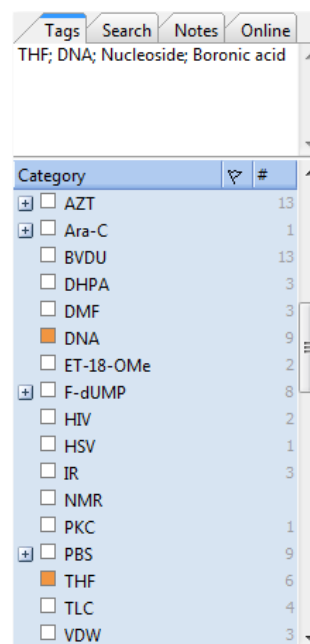
1.4.4 Tasks module

Manage research related tasks You can drag a reference or note into a tasks folder to create a new linked task. Organize your tasks according to the principles of Getting Things Done (GTD) and review them daily to boost your productivity.
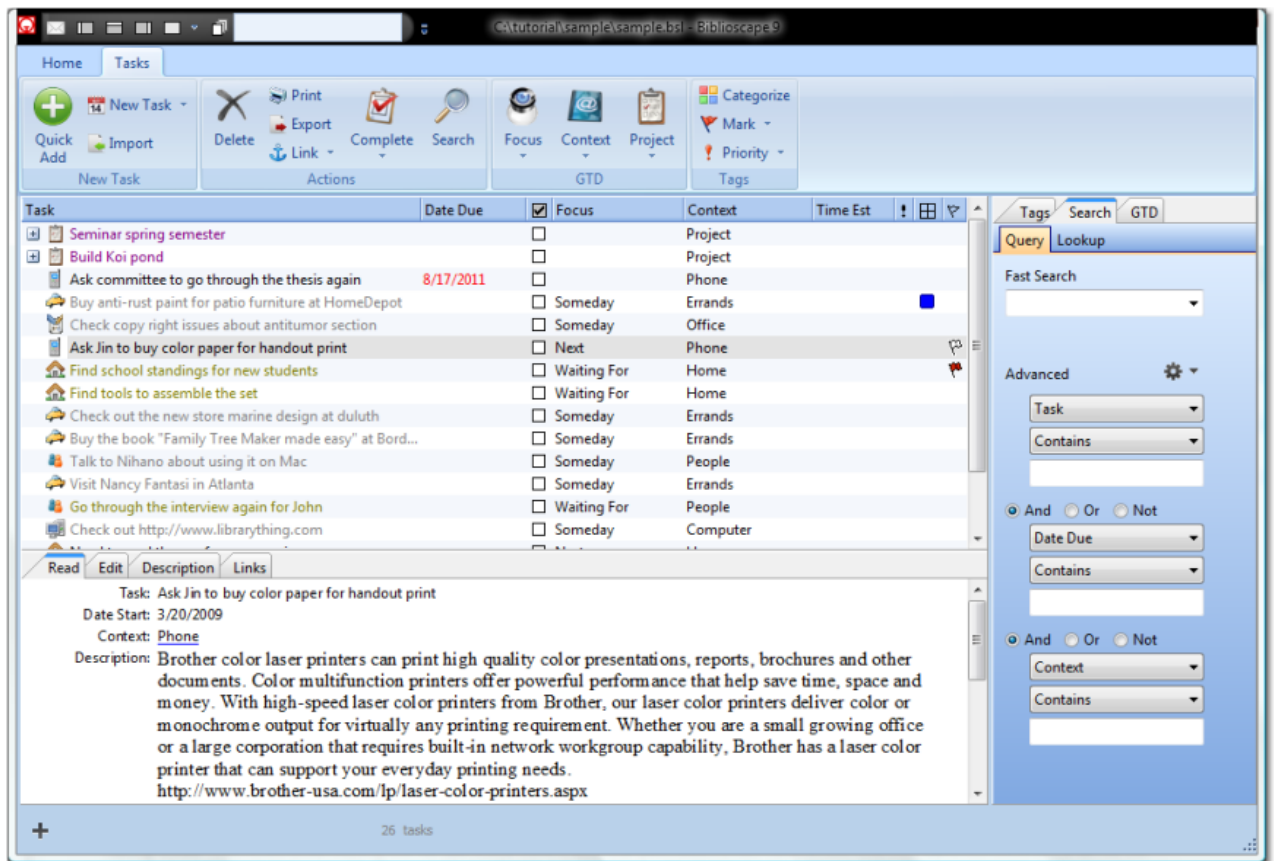
Focus Assign focus to your tasks and review the list daily.

Context Get more things done when you organize tasks by context.

Project Create a project for anything that requires multiple steps.

Tags	Search	GTD
Focus	Context	Project

- All -	26
- Unassigned -	1
🗔 Next	6
🎁 Someday	11
⭐ Today	3
💷 Waiting For	3

Tags	Search	GTD
Focus	Context	Project

- All -	26
- Unassigned -	0
🖥 Computer	2
🚗 Errands	7
🏠 Home	5
📋 Office	5
👥 People	2
📱 Phone	3

Tags	Search	GTD
Focus	Context	Project

- All -	26
- Unassigned -	17
📋 Build Koi pond	4
📋 Seminar spring semester	5
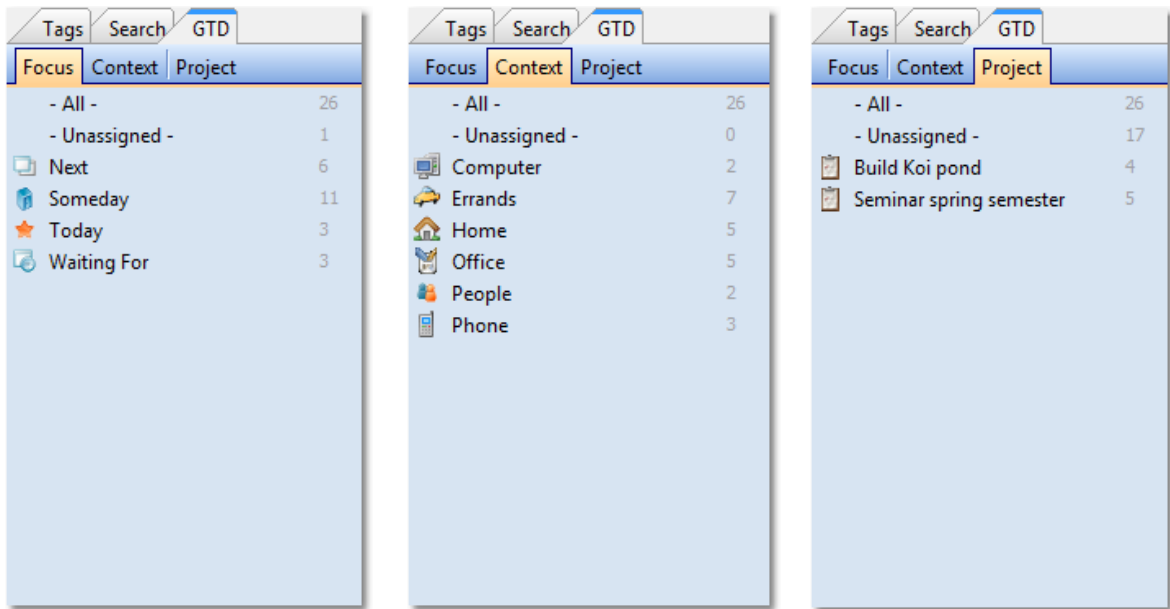
1.4.5   Charts module

Chart knowledge map Draw a chart to represent your knowledge space in a subject area. You can easily link chart objects to references, notes, files, web sites, etc.
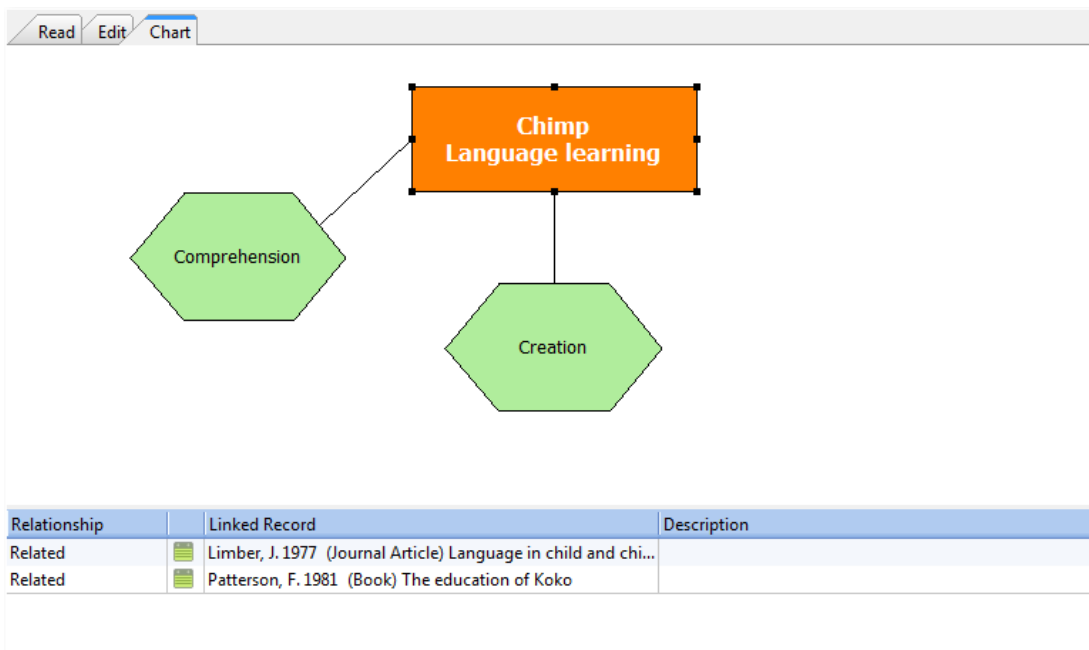
Chart editor Use the simple chart editor to draw a flow chart. You can control chart objects' font, color, shape, connections, etc. After finishing, you can select a chart object and create

links from the chart object to folders, saved searches, individual references, notes, as well as web sites and files.
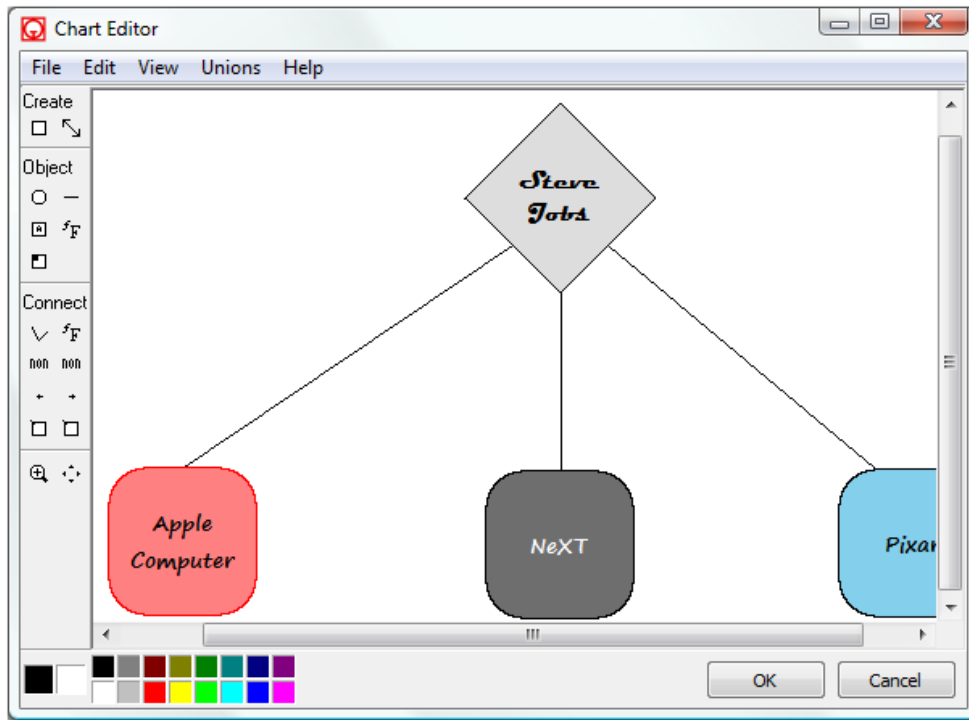
1.4.6   Library module

Library catalog You can drag drop records from a references folder to the library icon to create new catalog items. The catalog can be displayed in the card view and a book cover picture can be pasted for each item.
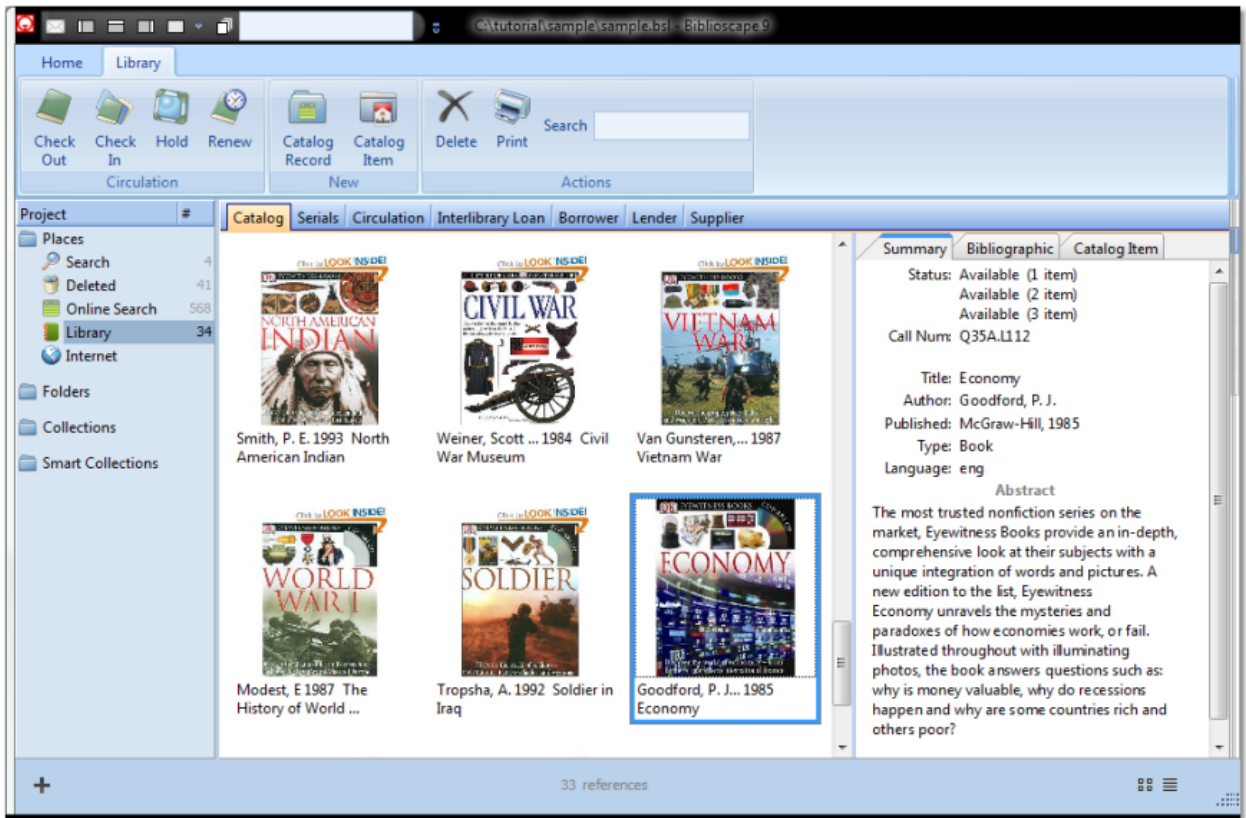
Serial management Serial management is an important part of managing a research library.

Borrower A photo can be added for each borrower.
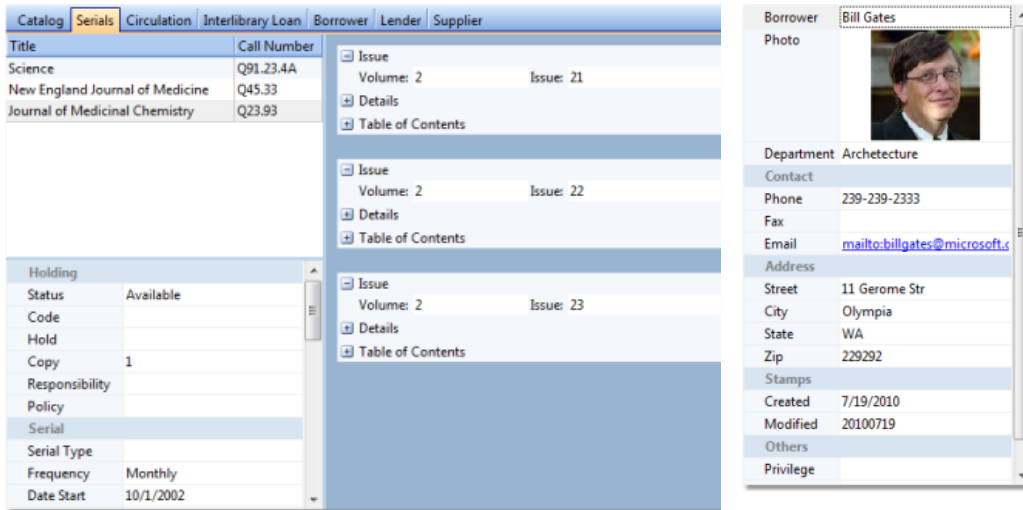
Web access With BiblioWeb server, your library catalog is searchable on the Web. All the

circulation tasks (check-in, check-out, renew, and hold) can be performed through a web browser.
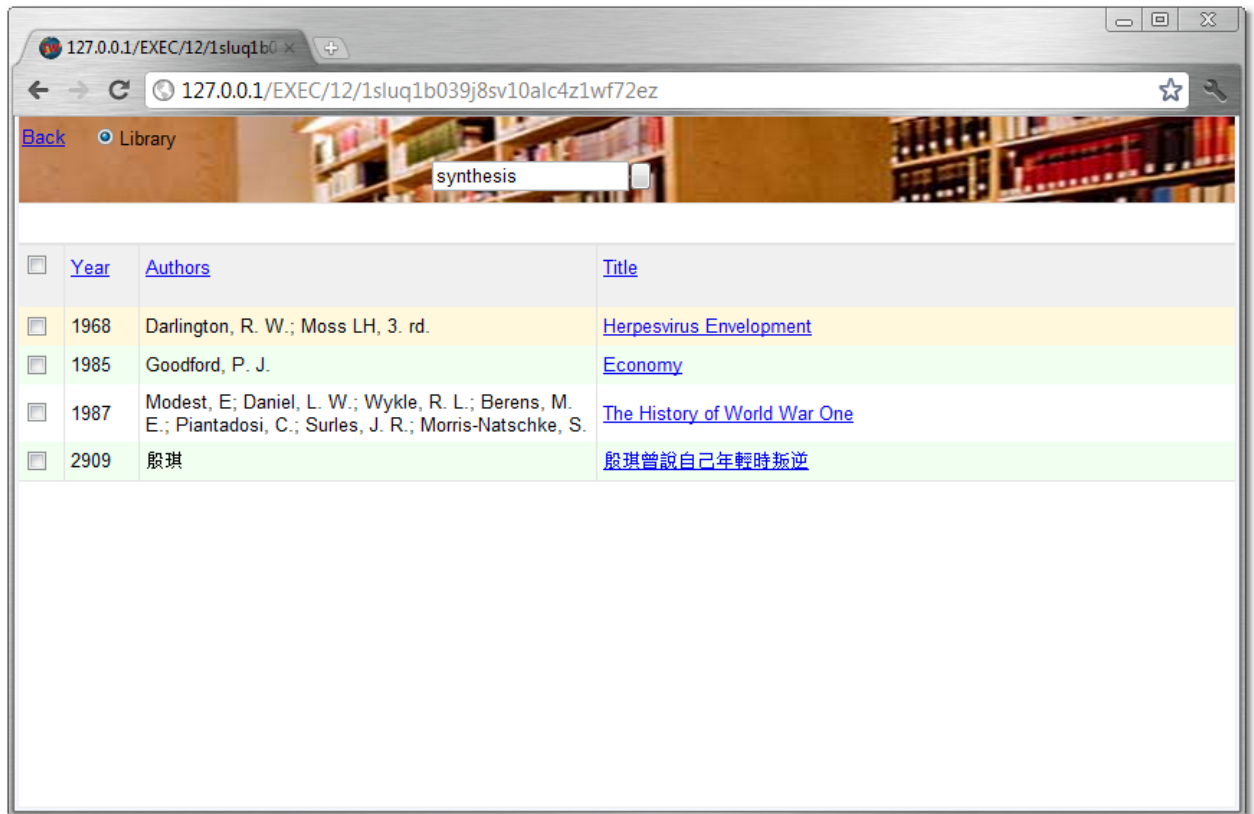
1.4.7 Web access

BiblioWeb server Biblioscape database web access is made possible by running the BiblioWeb server which is installed with Biblioscape. Making your database web accessible and under your control is no longer complicated and expensive.

Start BiblioWeb You can start running BiblioWeb through Biblioscape or by double clicking BiblioWeb.exe under the 'biblioweb' folder. You can also set it up as a Windows scheduled task so it can run automatically when your computer starts.
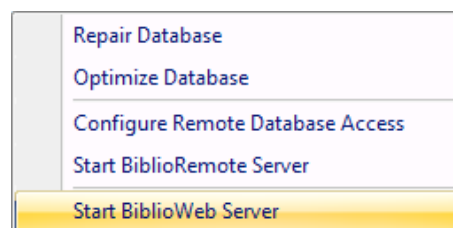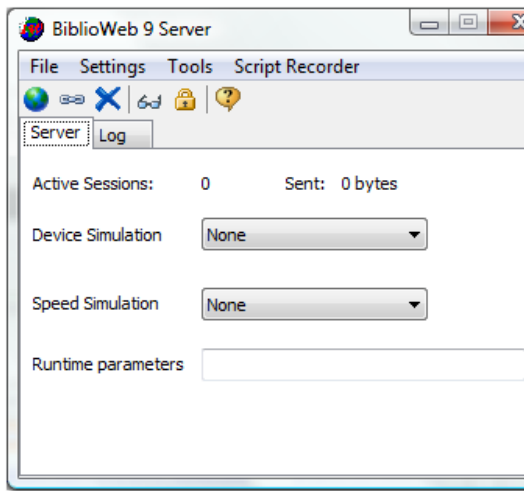
Web user interaction Web users can control who has access to the folders they create. Web users can connect with other users, and their postings will be visible in their connections home page. The new social network features in BiblioWeb will make cooperation on research projects easier. Users can form groups to share references about a common interest.
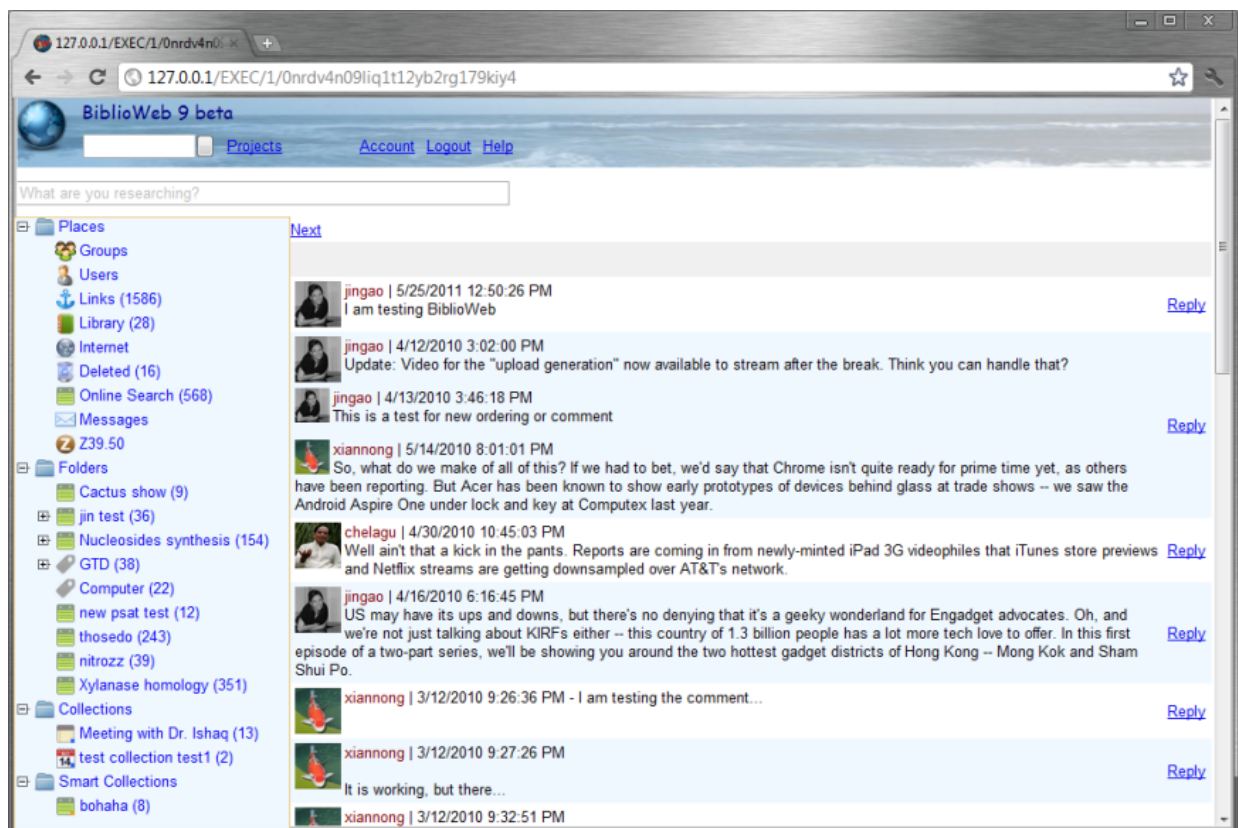
Web interface The BiblioWeb interface is designed to be usable on both desktop and smartphone web browsers. With BiblioWeb running, you can access your database from your desktop computer, notebook computer, tablet computer (iPad), smartphone, iPod Touch, etc.
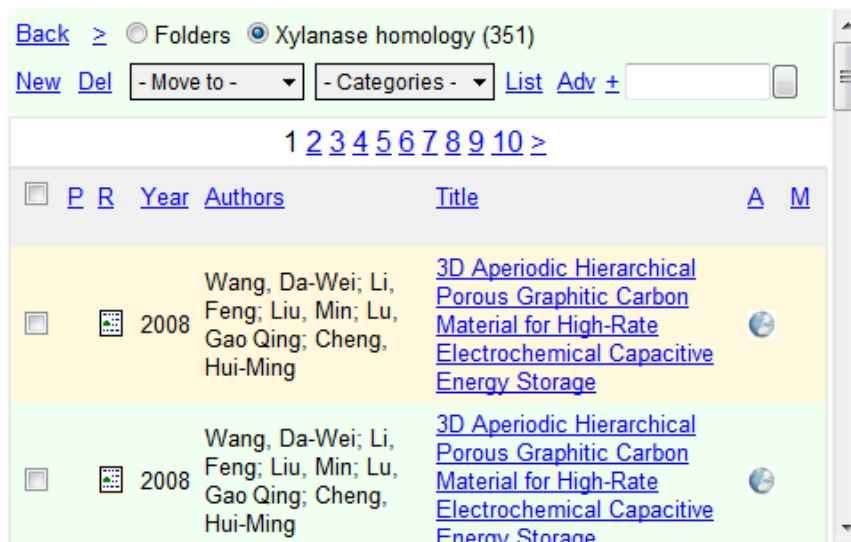
1.4.8 Multi-user

Shared database To share a database among users, first create a *.bsr file, have the database server running, and give the *.bsr file to other users. In a Local Area Network, performance is excellent. Over the Internet, performance is good.
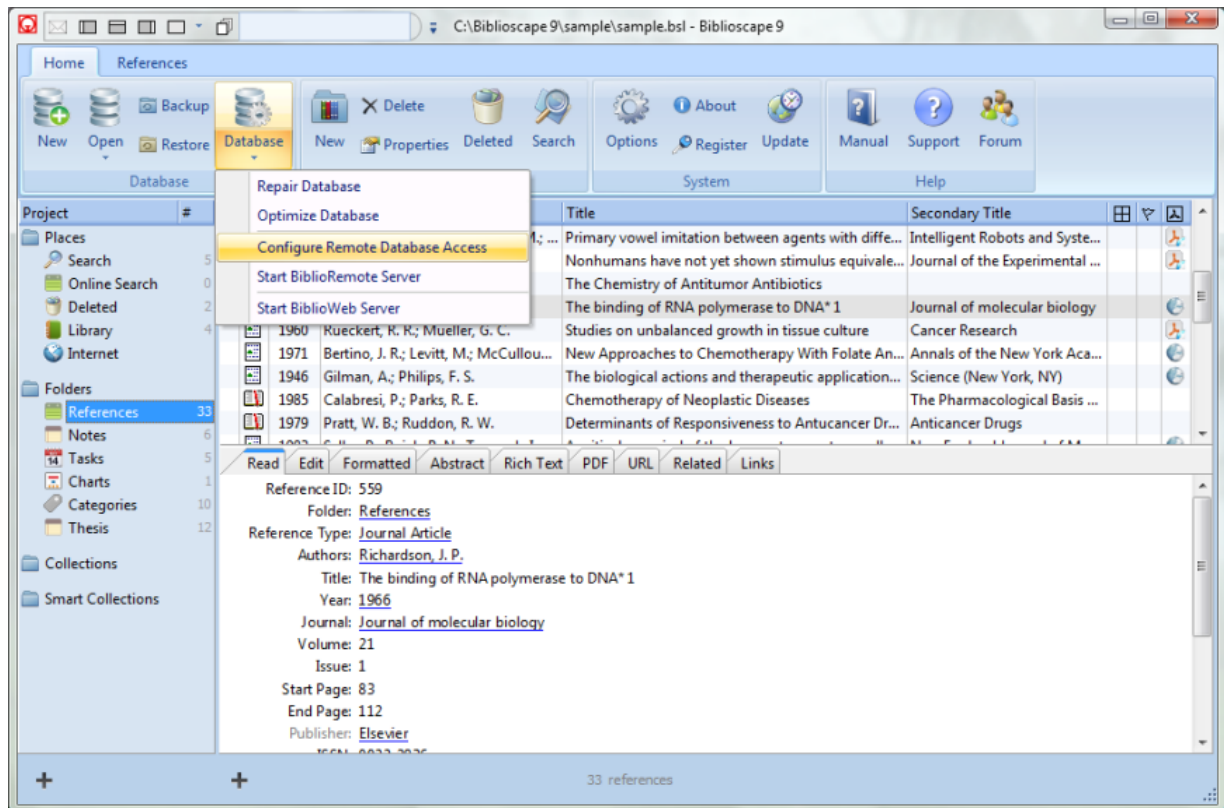
Remote access setup Setting up remote access takes less than 5 minutes. Make sure the port 12010 is open on both the server and client PCs. Copy the file "edbsrvr.exe" from the "biblioremote" folder to your database folder and run the "edbsrvr.exe" file. In Biblioscape, go to "Database | Configure Remote Database Access". Enter the server PC IP address, database name and user name. Give the *.bsr file to other users; they can open the file to access the remote database in Biblioscape. Users can share a common database in a whole organization with good performance.
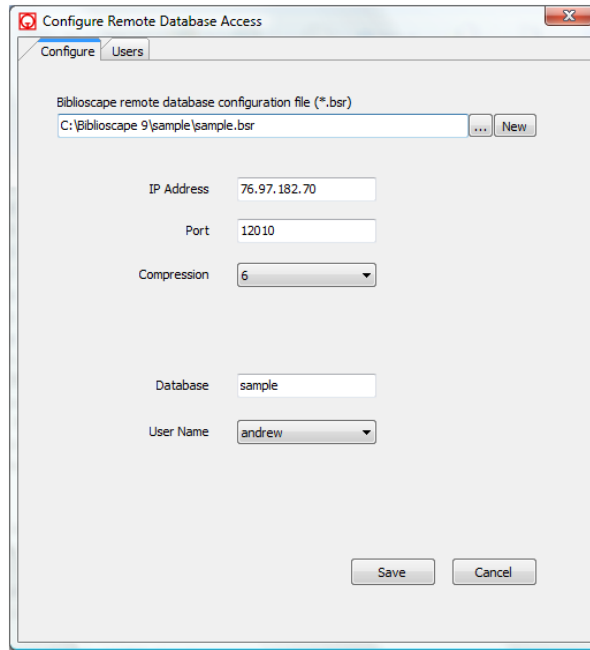
Database backup and restore Backing up your database can be automated after a certain number of sessions. Restoration to an earlier version of your database can be done with a single click.
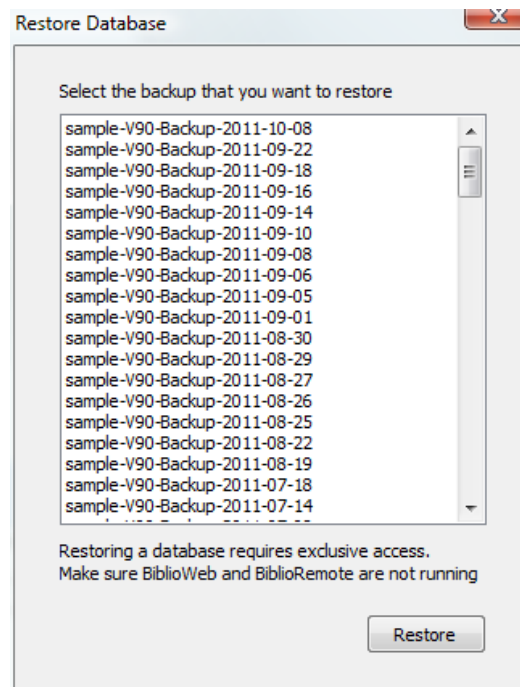
1.4.9 Biblioscape options

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
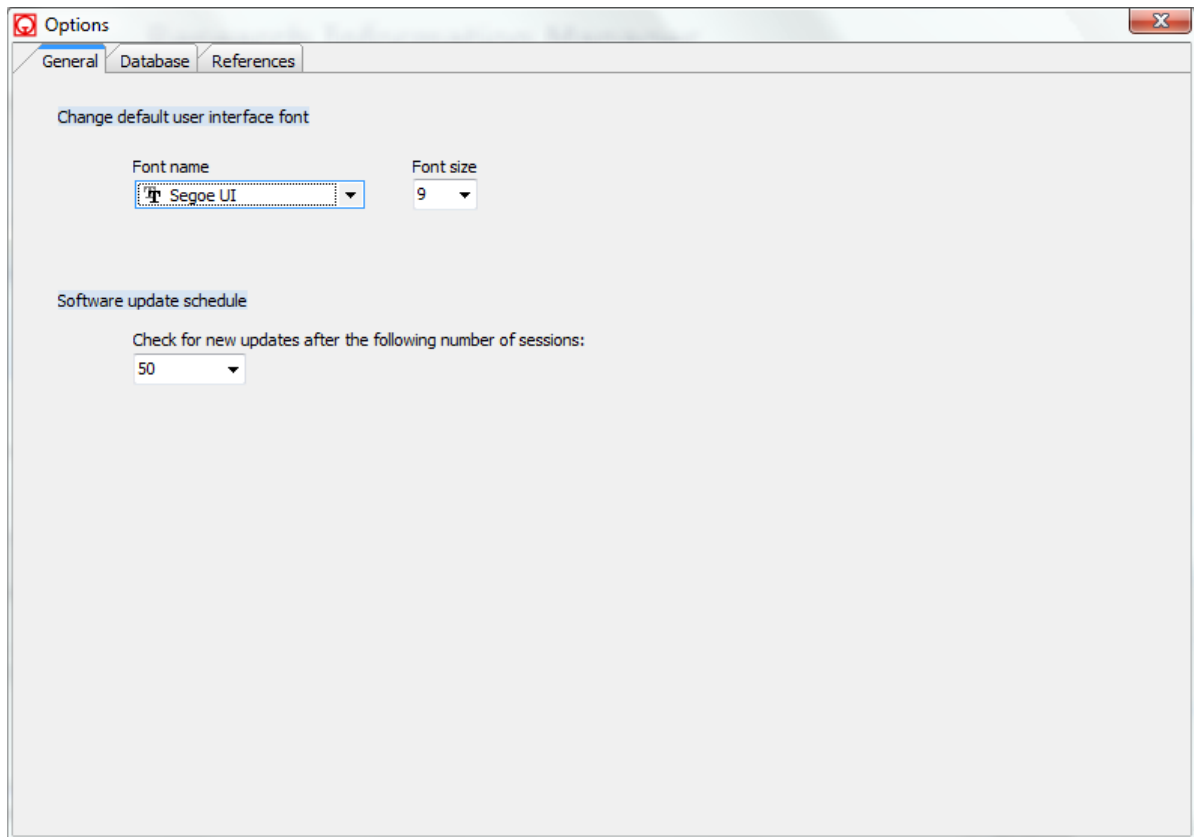
Change default user interface font: Biblioscape is set to use the font "Segoe UI" with size 9 by default. You can change this by going to the "Change default user interface font" section and selecting the font name and size. The text used by Biblioscape will be changed accordingly. All record editor windows opened subsequently will use the new font settings.

Software update schedule: Biblioscape can automatically check for update at startup. By default, Biblioscape will do the checking after every 50 sessions. You can change this to a smaller or larger number. You can also check for update manually at anytime by clicking the "Update" button under the "Home" Ribbon tab.
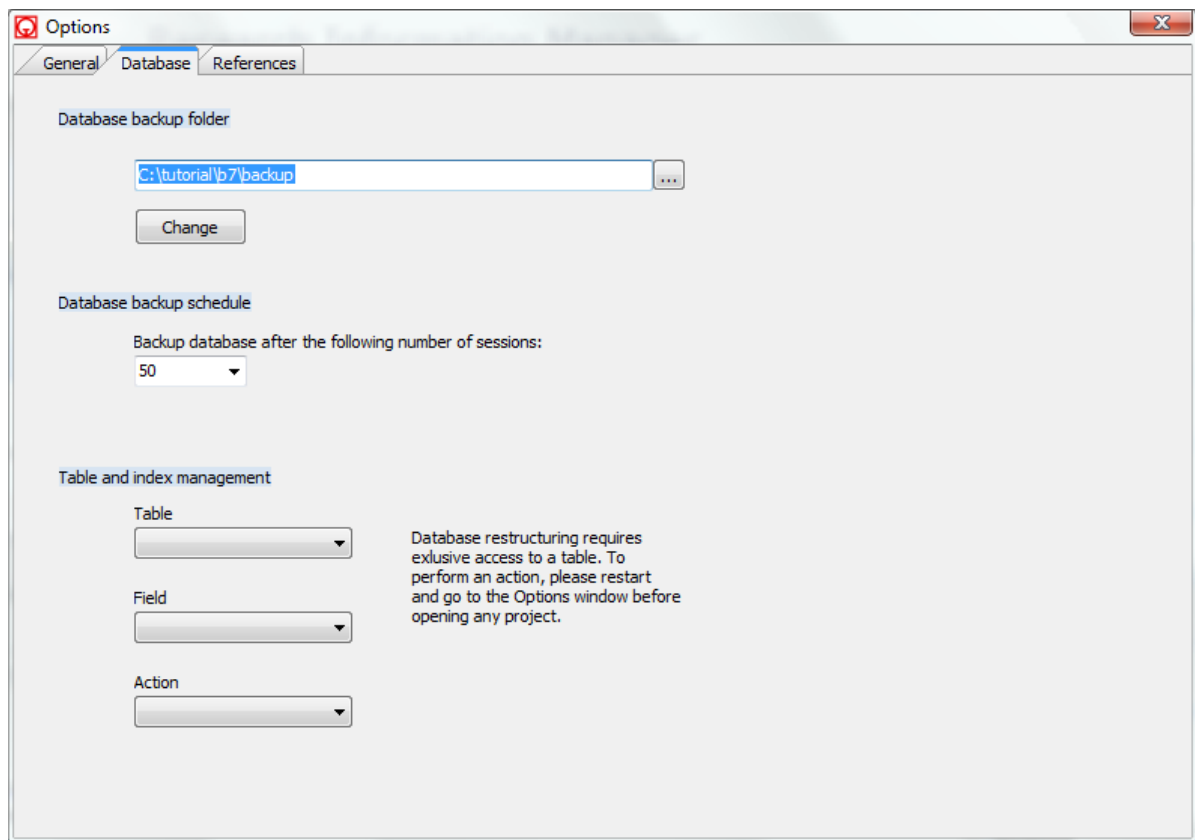
Database

Database backup folder: Biblioscape can backup your database automatically. You can specify at here where you want your database be backed up to. When creating a new database, the backup folder is set to the "backup" sub-folder under your database folder.

Database backup schedule: You can specify how often Biblioscape should backup your database. The backup is performed when you exit Biblioscape. By default, a backup is performed after every 50 sessions. When saving the backup file, Biblioscape will use current data as part of the backup file name. Besides the automatic backup, you can also perform a backup at anytime by clicking the "Backup" button under the "Home" Ribbon tab.

Table and index management: Occasionally, you may need to put more characters than what is allowed for a field. For example, the default field length for the "Custom 5" field in the references table (bib) is 50. If you need to put more than 50 characters in this field for lots of your records, you can increase the field length. You can do this by selecting a table first. Then select a field and choose "Change field length" as the action. Besides changing field length, you can also add a secondary index for a field. This will make some of your advanced search run faster. You can also add or remove full text index for a field. When you add full text index to a field, it will be included in the Fast Search.

References
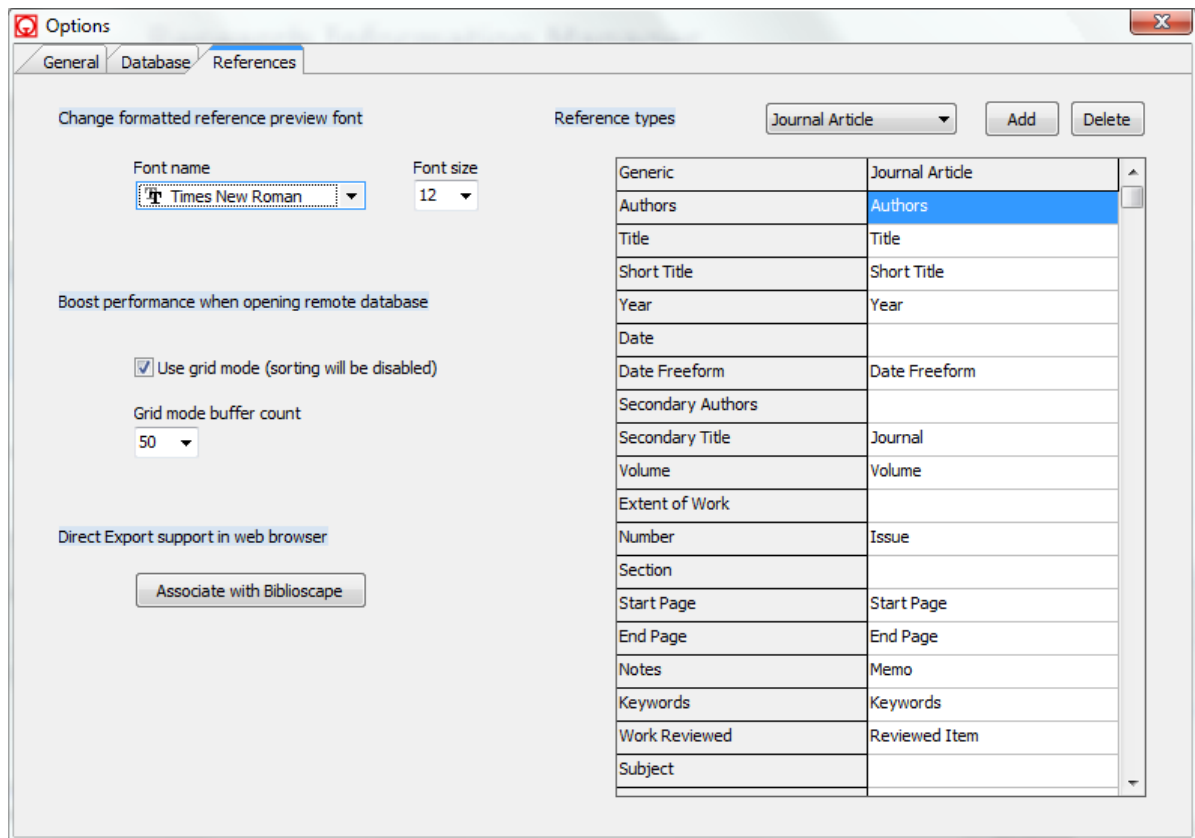
Change formatted reference preview font: You can control what font to use when Biblioscape generate the formatted citations and bibliography. This is also the font Biblioscape uses when copying formatted bibliography to the Clipboard.

Boost performance when opening remote database: When you open a database through BiblioRemote server, you may want to turn this option on to boost performance. But if your remote database is on the same Local Area Network (LAN), you don't need to turn this on. Only when you open a remote database from another location through the Internet, checking on this option will make a big difference.

Direct Export support in web browser: 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.

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 "Edit" tab.

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

- 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

- 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

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

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. 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. 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			✅	✅
BiblioWeb server			✅	✅
Library module				✅

Evaluation Edition: The evaluation edition has all the features of the Librarian Edition, but after the trial period, a nag screen will appear every time a user browses to a different record.

Price Information

Pricing information can be found at our web site: www.biblioscape.com

Where to order Biblioscape

You can order Biblioscape by credit card (online, fax, phone), check, or Paypal. Please go to our purchase Web site for detailed information. After we have processed your purchase, a receipt email will be sent to you along with the registration code.

How to register

Once you have received your registration code, start Biblioscape and click the "Register" button under the "Home" Ribbon tab. Biblioscape will prompt you with a thank you screen for a successful registration.

1.7.1   Company information

Company Information

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

Email:
Support: support@biblioscape.com
Sales: 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

II
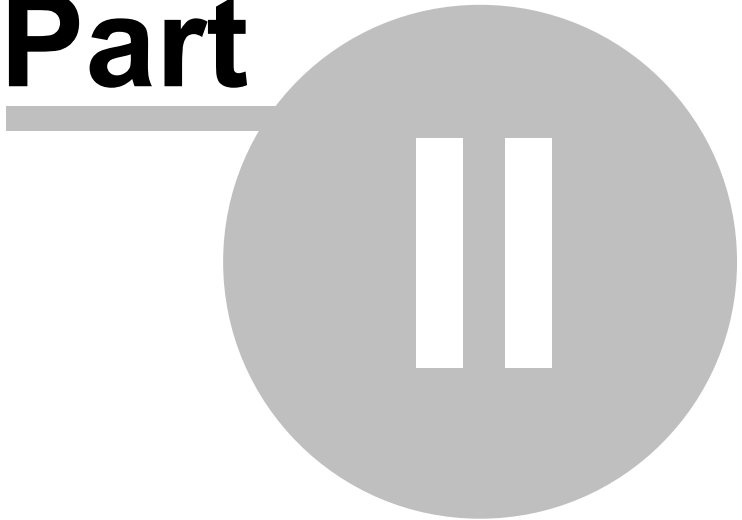
2   Quick start tutorial

Let's start with a quick overview of how to use Biblioscape. The best way to do this would be carrying out a research project using Biblioscape, 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 Biblioscape can be used to collect references, take notes, organize information, and format papers in a typical research paper writing project. Biblioscape 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 Biblioscape for a small and simple project. The workflow that is described in this tutorial will provide a clear insight into what Biblioscape 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 Biblioscape 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 Biblioscape interface

Biblioscape 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.
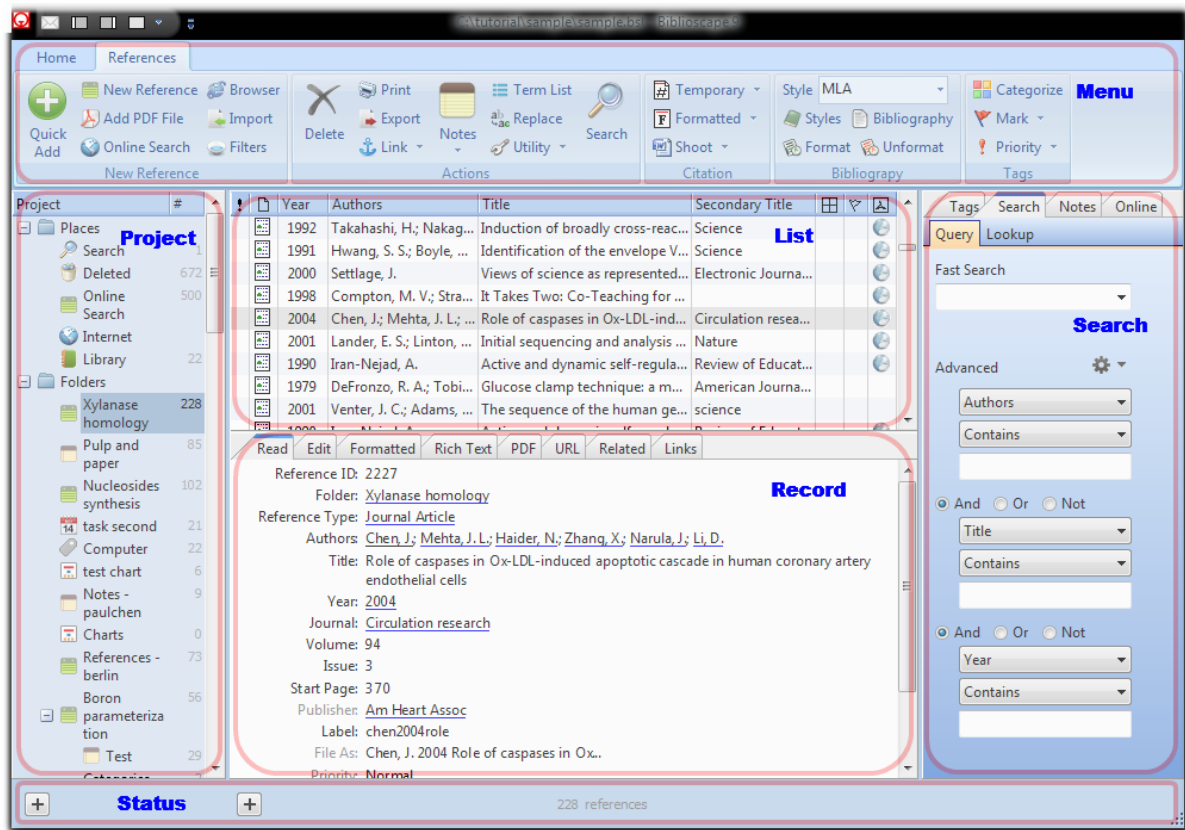
Menu Pane

Biblioscape 9 starts to adopt the Ribbon GUI to replace the traditional menus and toolbars. The new Ribbon interface makes all commands more accessible. If you want more screen space to display your records, you can hide the Ribbon by double clicking on the Ribbon tab. In the hidden mode, you can click the Ribbon tab to make all commands temporarily visible. If you want to bring the Ribbon back, just double click the tab again.

On top of the Ribbon, it is the Windows title bar. There are several command icons displayed on the left to toggle each pane. For example, if you want to concentrate on the current record, you can click the "Toggle Record Pane (F6)" icon, all other panes will be gone except the record pane. Once you are done with the current record, click that icon again will bring back the other panes.

Project Pane

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 Search to enter a search term against all module. 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 Collections so you don't have to build the query again and again.

List Pane

The list panel is at the top of the center panel. It displays 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. Records are displayed in a tree view for all modules except the references module which uses a table view. For the notes, tasks, charts, and categories module, you can re-arrange records in the tree view by drag and drop. In drag mode, move the cursor before the icon column, the cursor will turn into a blue up or down arrow. You can then release the mouse button to make the selected record go up or down. If you move the cursor after the icon column, the cursor will turn into a yellow right arrow. Releasing the mouse button will make the selected records the children node of the dropped record.

Record Pane

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.

Search Pane

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 record panel "Read Only" tab 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 double 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. 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. A convenient feature in the status bar 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.

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".
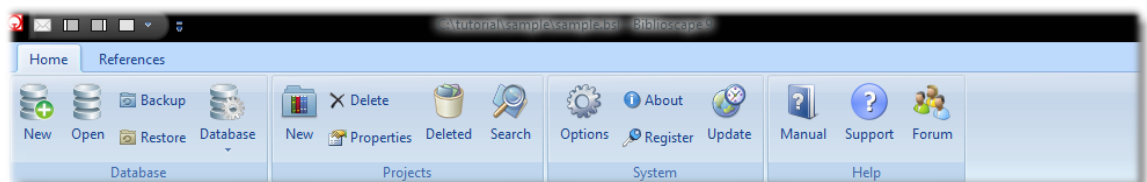
2. You will be prompted with a popup Window. It reminds you to keep only one database and organize different projects with folders and collections. Having all your research related information in a single database has many advantages. You only need to backup one database and there is only one place to 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

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 chose 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 interest 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 Biblioscape notes 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
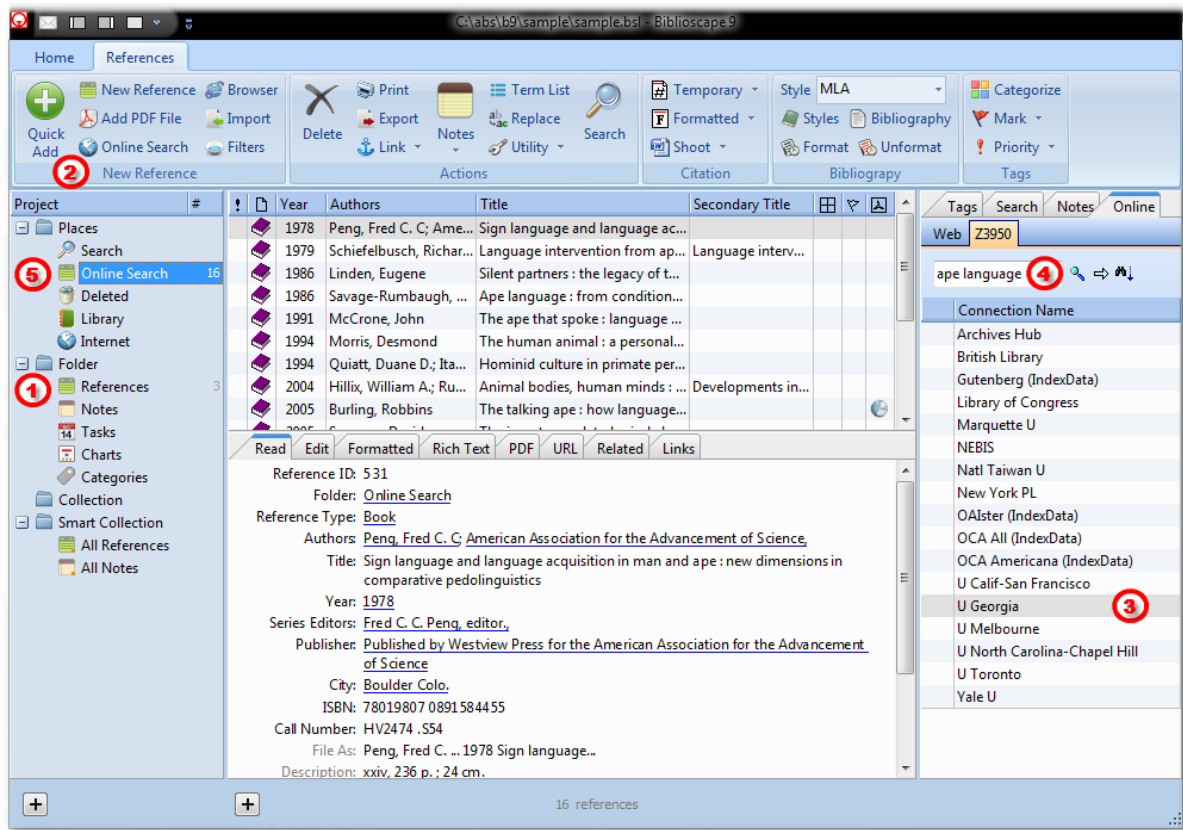
1. After creating a new database in the last tutorial, it will be automatically opened the next time you start Biblioscape. There are 4 top level items created in the project tree. Open "Folder" and click the "References" folder.

2. On the "References" tab, in the "New Reference" group, click the "Online Search" button.

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.
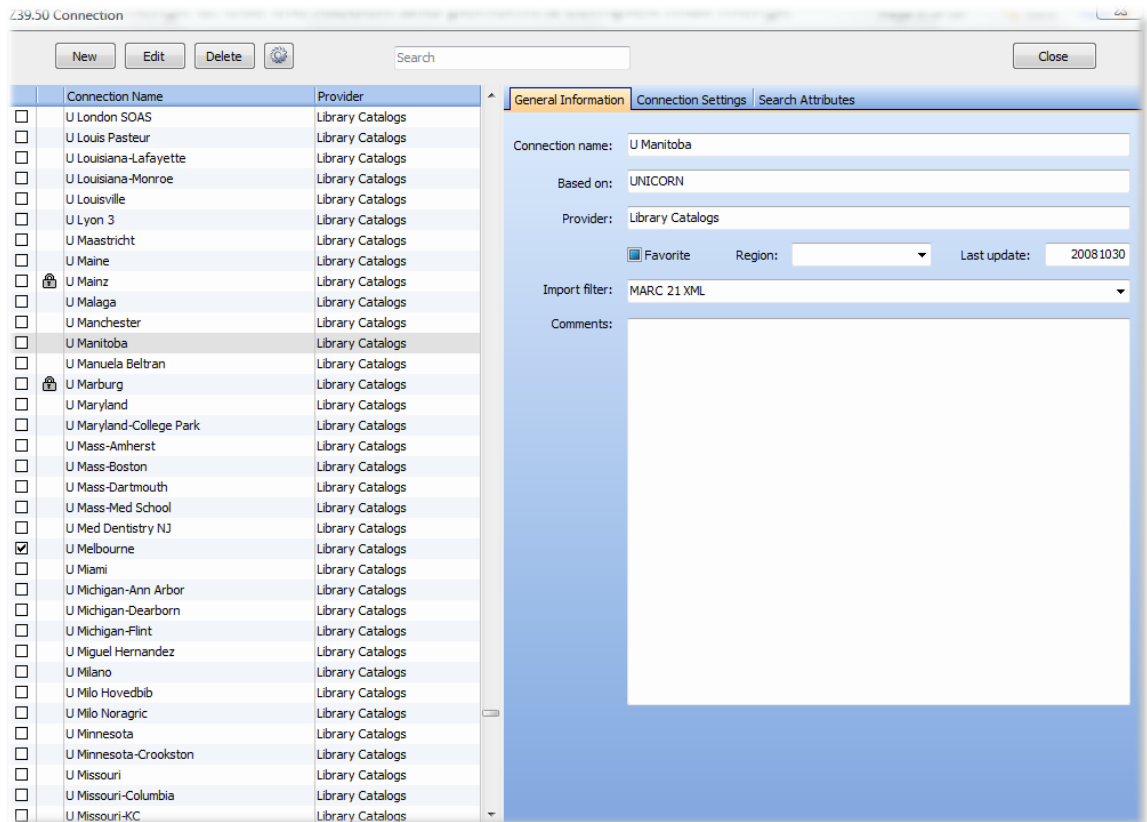
4. In this tutorial, let's search the University of Georgia library catalog as an example. Under the "Z39.50" tab, select the source "U Georgia" and enter "ape language" as the search string. After pressing the Enter key, Biblioscape will send the search string to the University of Georgia library catalog server and return the total number of hits. There are a total of 19 records found. By default, Biblioscape will retrieve 10 records per batch after you click the OK button. Click the cyan right arrow to retrieve the next batch.

5. All 19 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.

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.

2. On the "References" tab, in the "New Reference" group, click the "Online Search" button. In the search panel on the right, click "Web Search" tab at the top.

3. Select "Google Scholar". Enter the search string "chimp language wars" and press the Enter key.

4. Biblioscape will send the search to Google Scholar and automatically import the first hit into the "Online Search" folder. Click the cyan right arrow to retrieve the next hit. 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.

5. 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". Biblioscape will automatically import the reference into the current references folder.
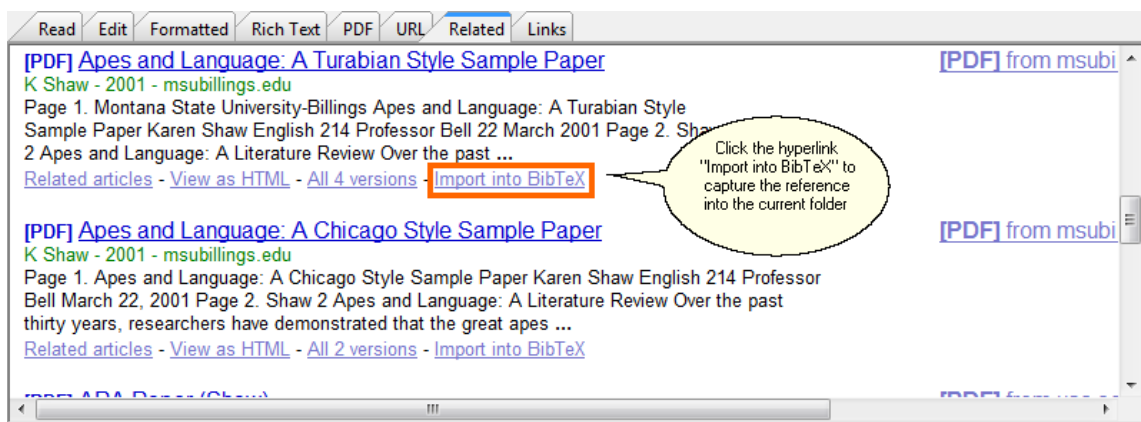
6. Now you have found some interesting papers. It is time to go to the library and make photo copy of those papers. In recent years, the full text of recently published scientific papers have become freely available, especially in the life science fields. Google has also made part of the full text of many published books freely available. When you browse to a new reference, Biblioscape 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 web or PDF icon in the last column, you can click on PDF or URL tab. You will find the full text or instructions about how to get the full text electronically.

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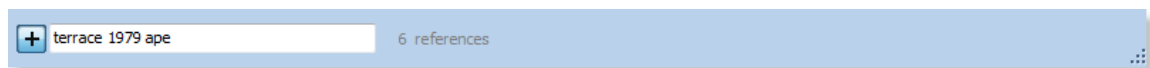
3. Biblioscape will search the Internet and automatically import the best match into the current folder.

4. You may have noticed that there is a PDF icon in the last column of the references list. It means Biblioscape has found the full text of this paper. You can click on the "PDF" tab to read the full text.

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. You can click on the "PDF" tab to view the full text. If you have a small screen, you can click the "Toggle Record Pane (F6)" button to make the PDF pane occupy more space.
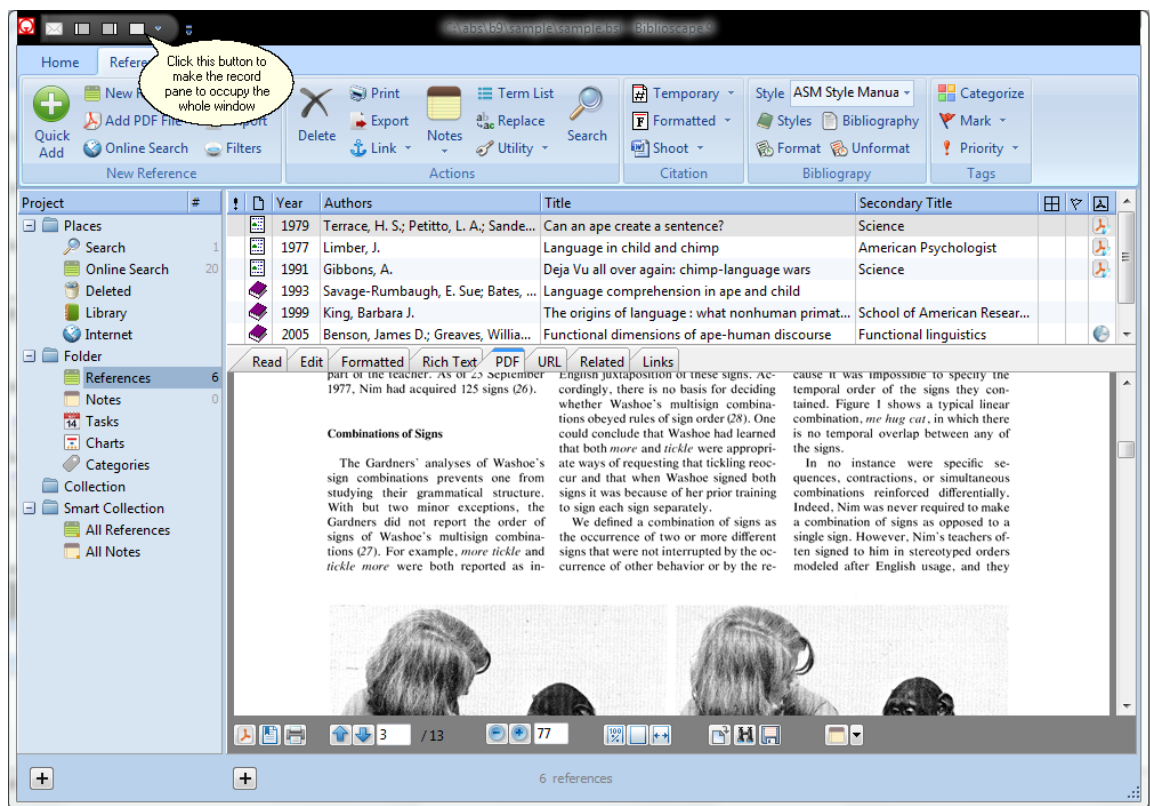
2. When reading a source material, you can add notes to be associated with the source inside the reference editor. In the PDF viewer, you can select an area of interest first. The selection can be part of a picture or text, click the drop down arrow of the "Show Notes" button and select the type of note you want to add.
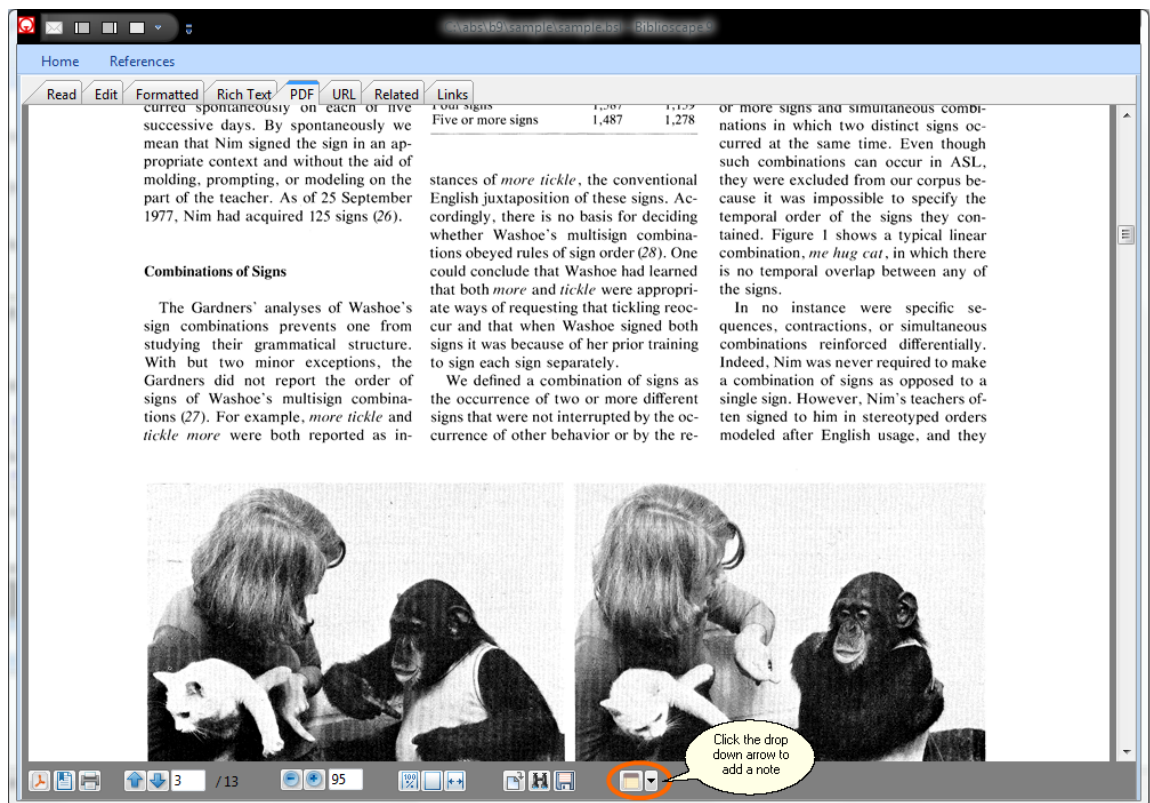
3. In this example, let's add a note about the conclusion from this paper. First, select the notes folder where you want the new note to be added. Then, add "Language is not used spontaneously by apes" as the title, and select "Claim" as the "Note type". Click the OK button to add the note.

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]
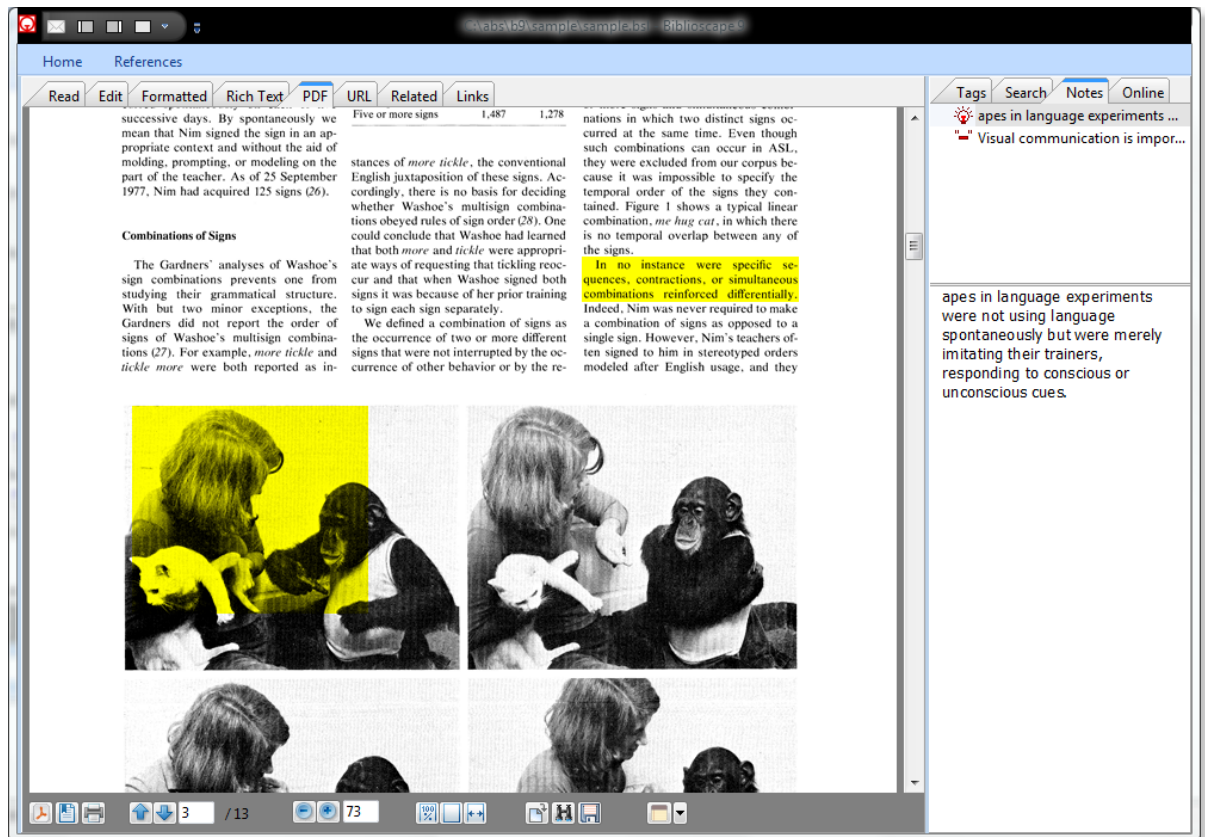
5. Now we have added a note. While reading the paper, you will find that its conclusion contradicts the conclusion from another paper "Patterson, F. & Linden, E. 1981". The Patterson paper reports that apes have used sign languages to each other spontaneously. We can add a link between these two references and assign "Contradicts" as its link relationship. Go to the "References" tab and click the "Link" drop down arrow and select "Link to Reference...".
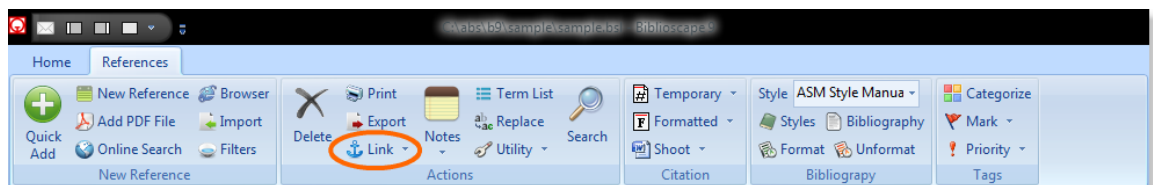
6. Select the "References" folder on the left. In the middle panel, select the reference "Patterson, F. & Linden, E. 1981" as the reference to link to. On the right panel, select "Contradicts" as the "Link relationship" between "Terrace, H. S. 1979" and "Patterson, F. & Linden, E. 1981". Click the "Add Links" button.
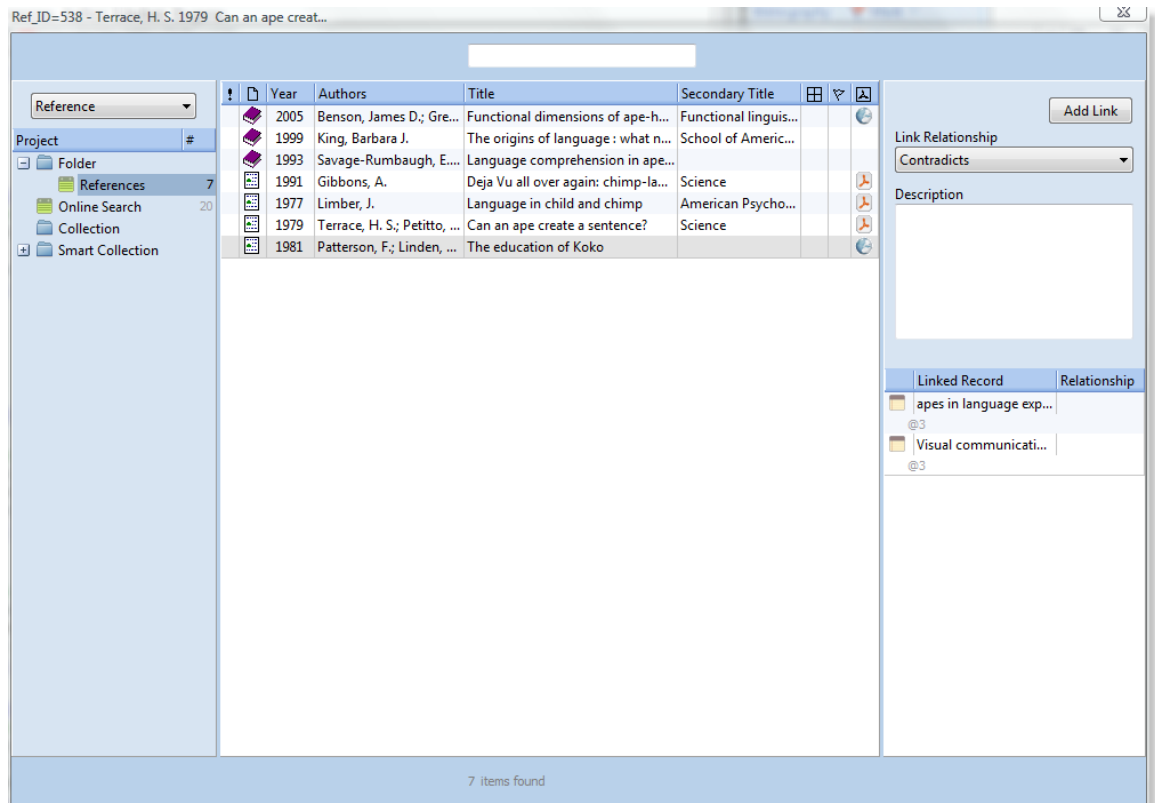
7. The new link will be shown on the "Links" tab.
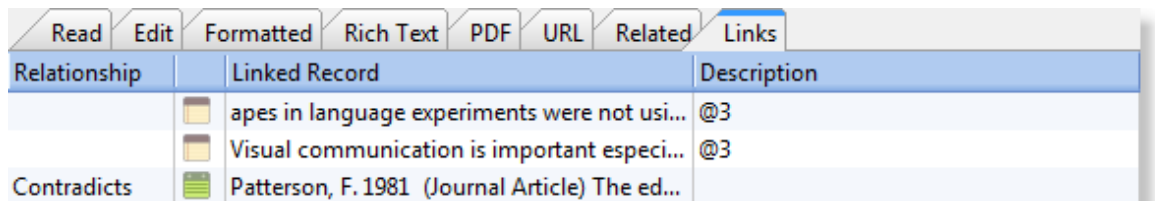
2.6   Organizing with categories

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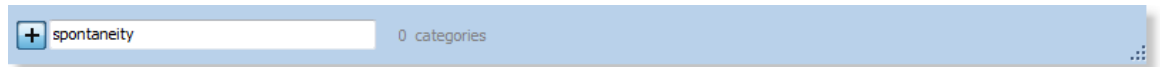
3. All 4 categories are now added to the categories folder. You can use them to tag your references and notes.

4. Now, lets go to the "References" folder. In the search panel on the right, click the "Categories" tab. 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. Biblioscape will tag those selected references with the category "spontaneity".
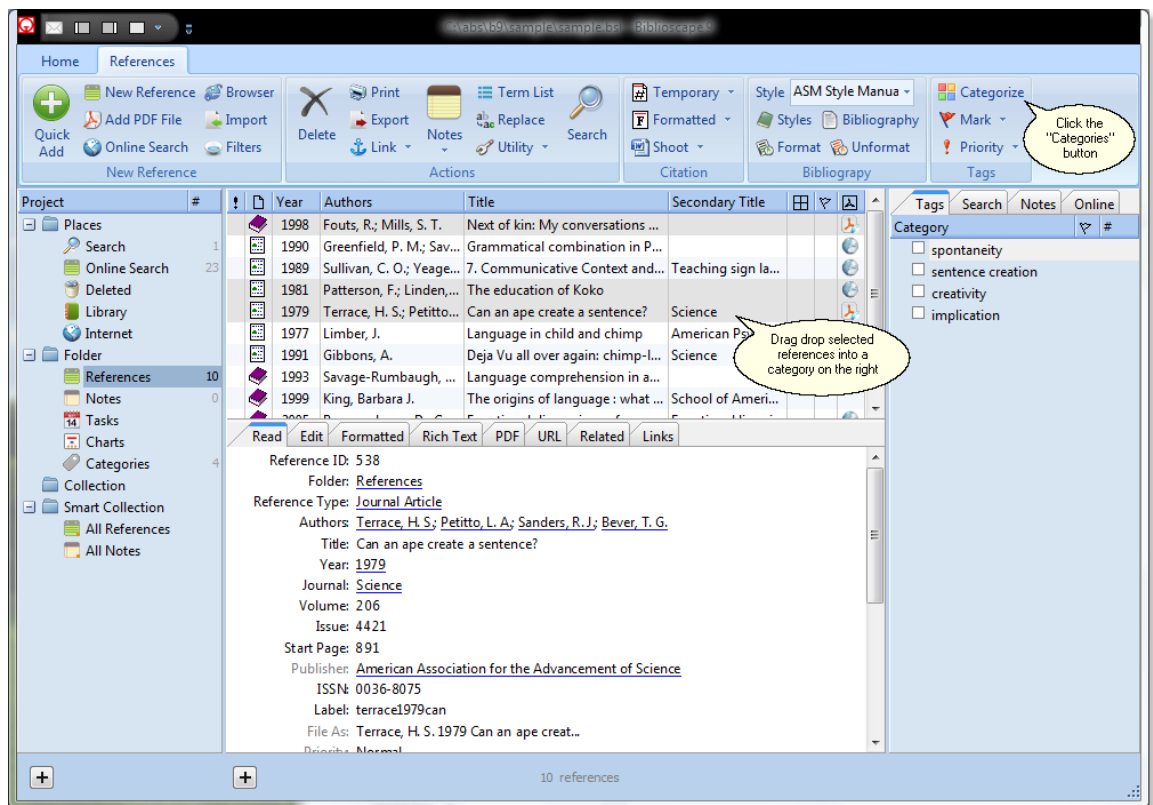
6. Double click on the category "spontaneity" in the categories tab. Biblioscape will automatically retrieve all those references that are tagged by the category "spontaneity".
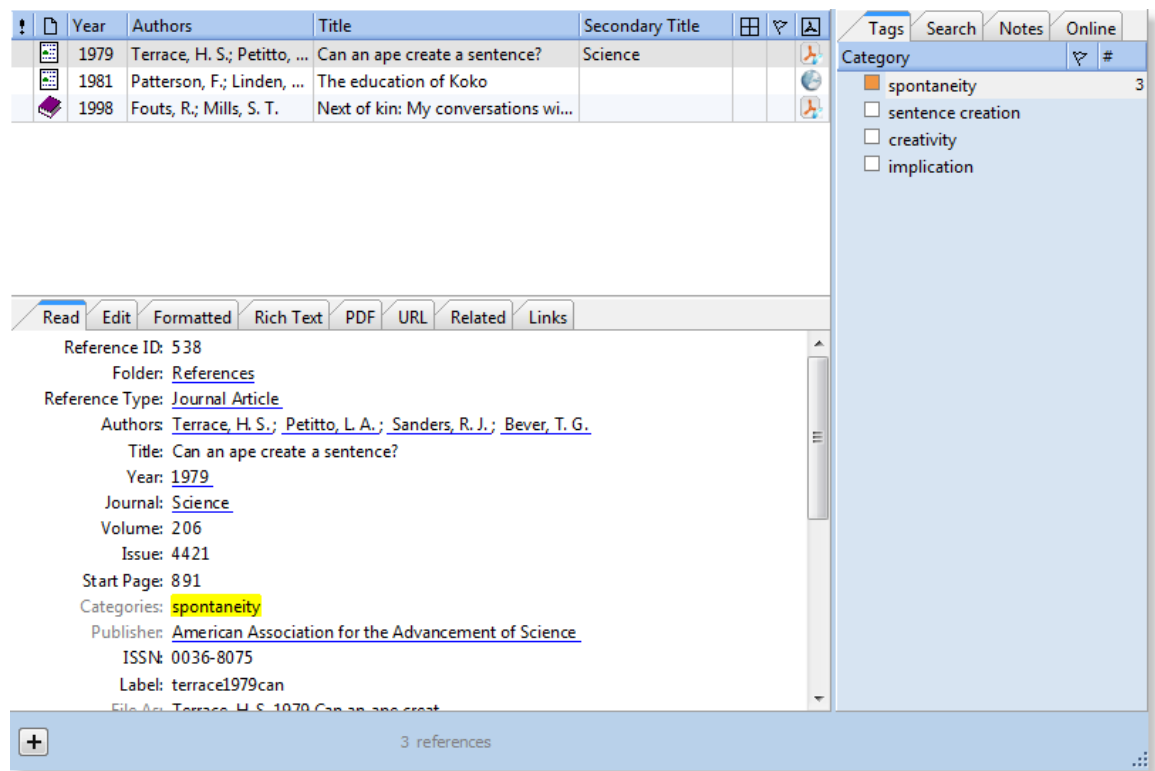
7. You can organize notes by categories in the same way.

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

1. Let's use Microsoft Word as an example. When you write in Word and need to cite a reference, switch to Biblioscape. 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 double click on the category item on the right to locate the reference you want to cite.
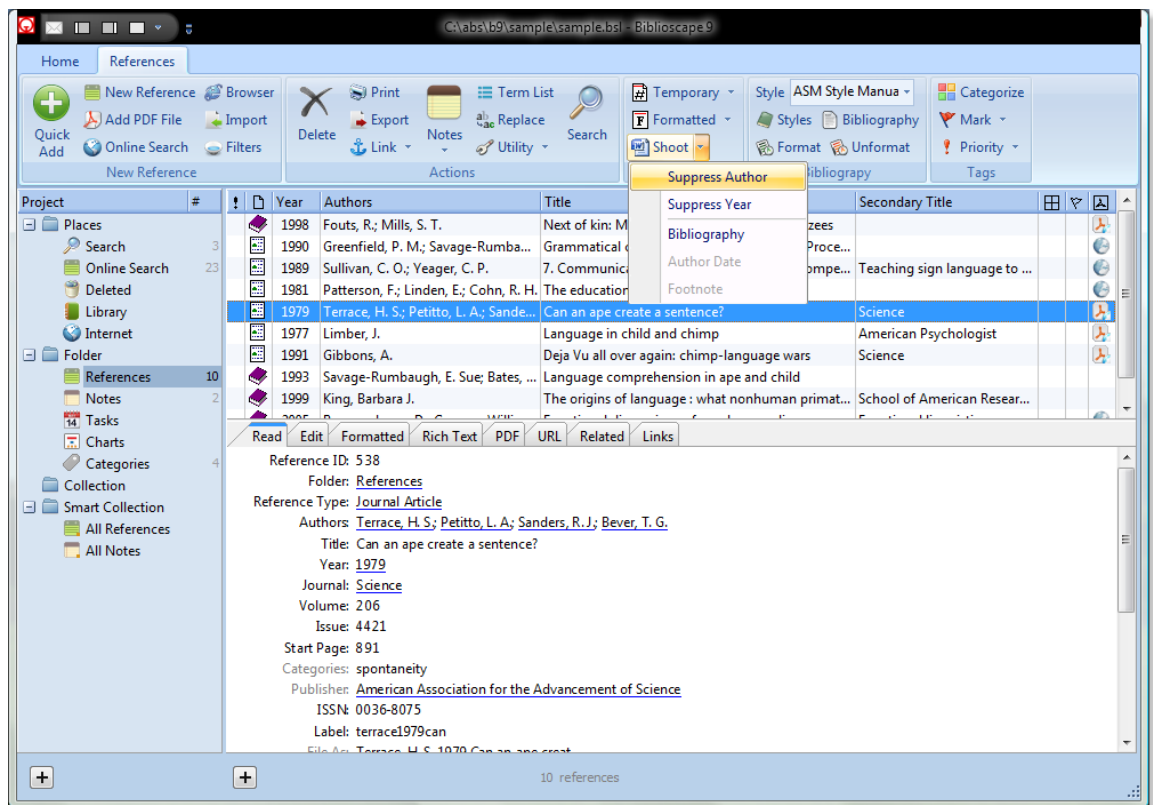
2. To cite the reference, you can click the "Shoot" button. The selected reference will be inserted into Word in the form of temporary citation. Or, you can press Ctrl+T to copy the temporary citation onto the Clipboard, go to Word, and paste the temporary citation by pressing Ctrl+V.
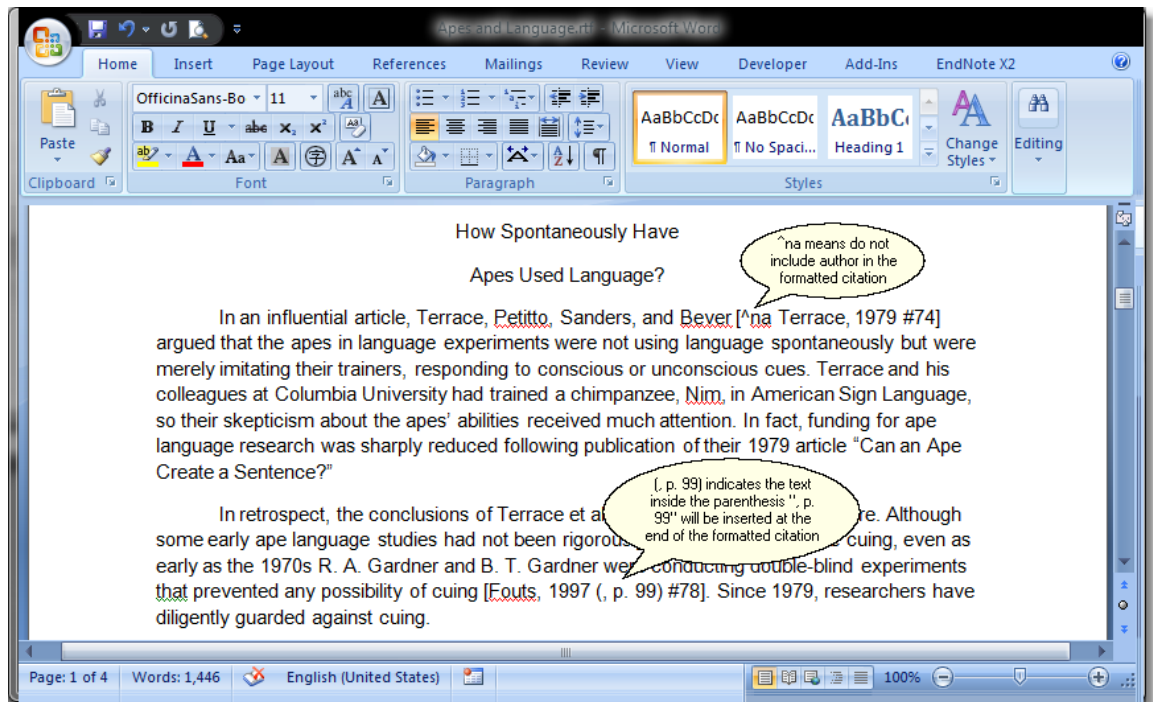
3. A temporary citation can be modified in several ways. For example, if you have already mentioned authors in the main text, there will be no need to include authors again in the formatted citation, you can put ^na inside the temporary citation to tell Biblioscape not to include authors in the formatted citation during formatting.

Insert notes

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, click the right mouse button, and select "Shoot to Word". If the note is linked to a reference, Biblioscape will include the linked reference as a temporary citation at the end of the inserted note. You can do the same when you are in the notes tab of a reference window. Just click the right mouse button and select "Shoot to Word".

Format manuscript

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

Save a copy of the document

Word Document
Save the document in the default file format.

Word Template
Save the document as a template that can be used to format future documents.

Word 97-2003 Document
Save a copy of the document that is fully compatible with Word 97-2003.

Find add-ins for other file formats
Learn about add-ins to save to other formats such as PDF or XPS.

Other Formats
Open the Save As dialog box to select from all possible file types.
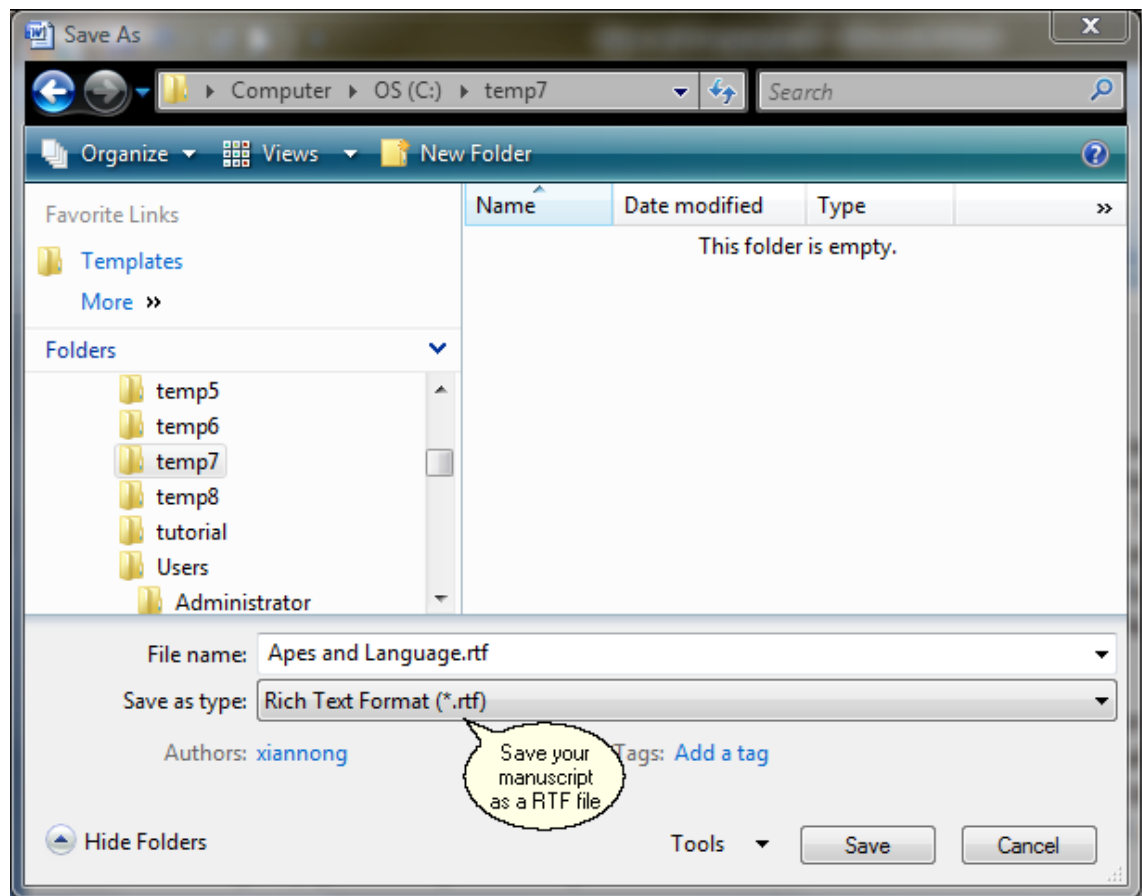
2. In Biblioscape, go to "Tools | Format Manuscript". Select the file you saved in the last step. Select "APA 5th" as the style to use. Click the "Start" button to format the manuscript.
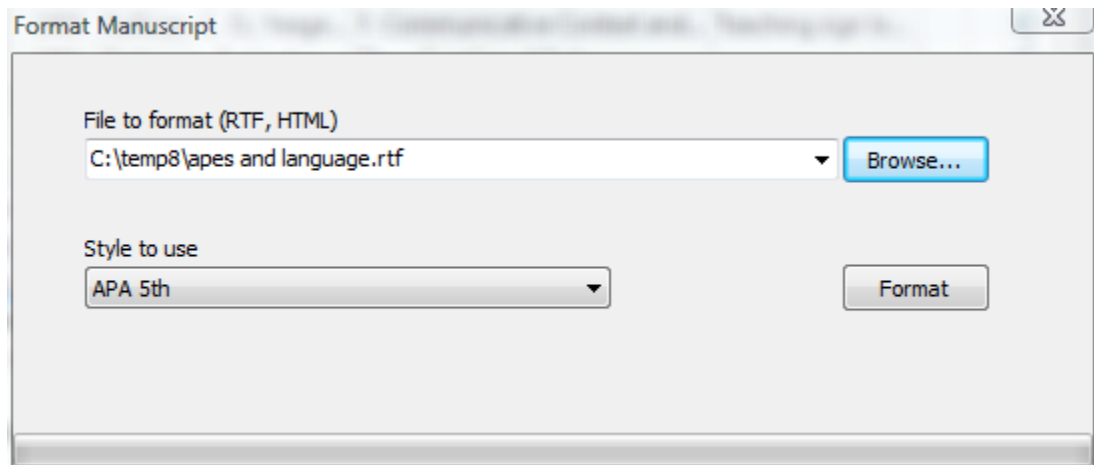
3. Once finished formatting, click the "Yes" button to open the formatted manuscript. Biblioscape will convert the temporary citations into formatted citations and generate a bibliography at the end of the manuscript.
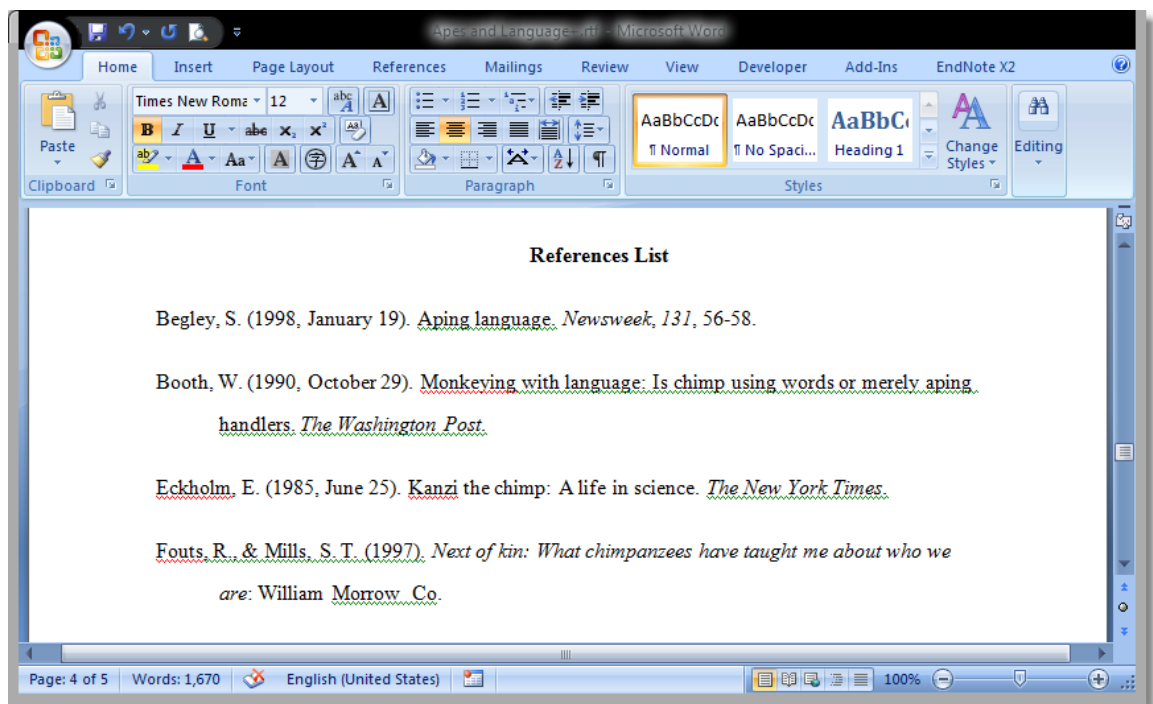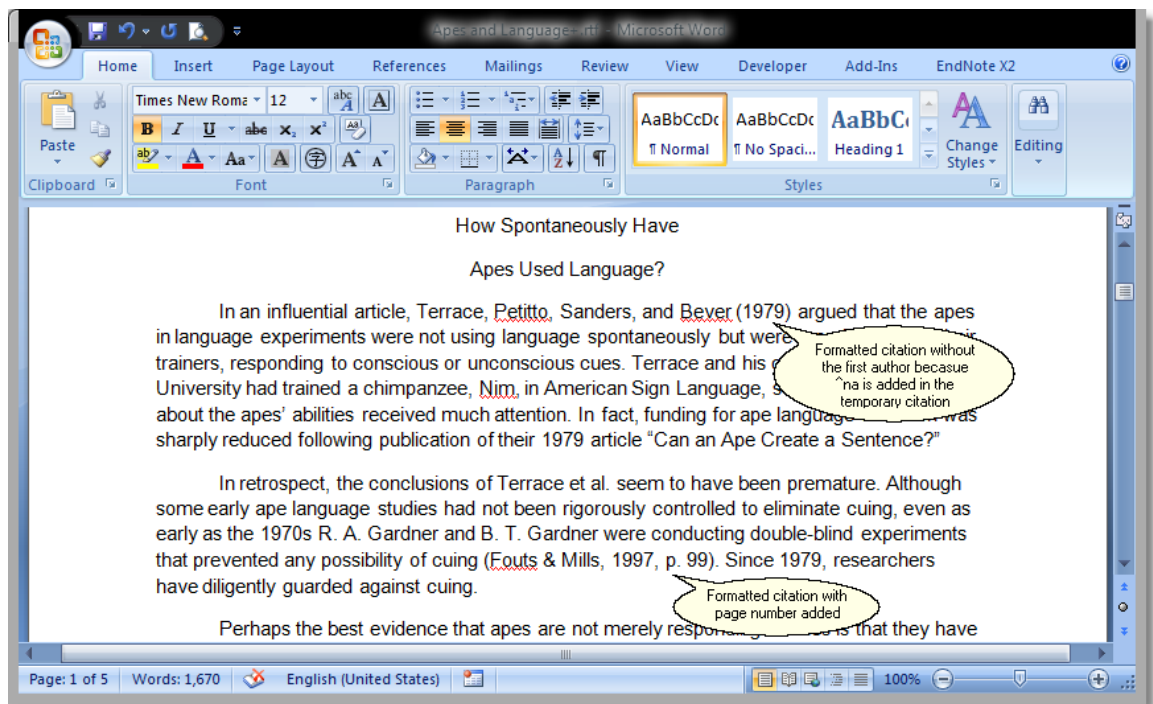
Managing projects

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

Part III
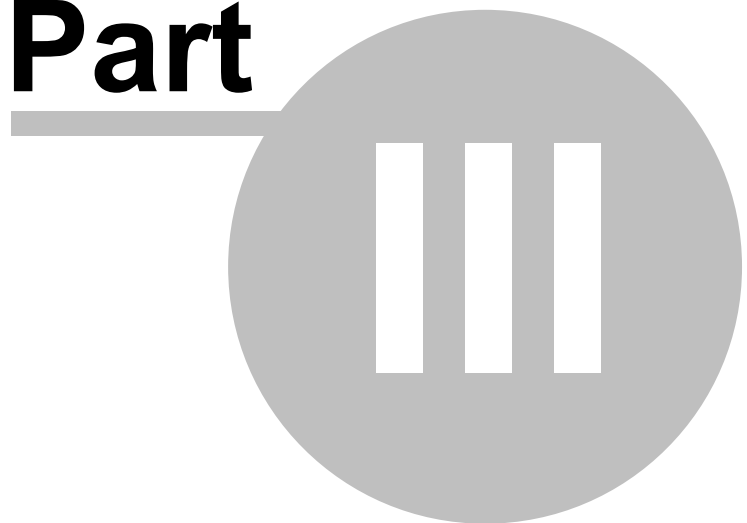
3   Managing projects
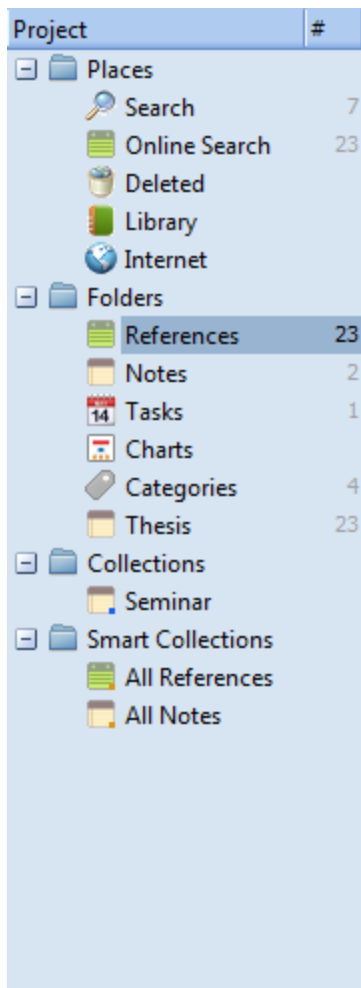
All Biblioscape records from different modules are managed in the project tree. Under the project tree, there are 4 top level branches: **Places**, **Folders**, **Collections**, and **Smart Collections**. Under the "Places" branch, there are:

- "**Search**" to perform searching across modules;
- "**Online Search**" to store references captured from the Internet temporarily.
- "**Deleted**" to access all the deleted records;
- "**Library**" to access the library module;
- "**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.

- **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.

Under the "Collections" branch, you can open a collection of references, notes, tasks, charts, and categories. Folders are the basic organizing tool. A record must be under a folder. Collections are optional when you need to have the same record under two collections. Some users may never need to organize records under collections. The more detailed comparison between folders and collections will be presented later.

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. Unlike folders and collections, you don't put records into a smart collection. It will query the whole database and list all those records that satisfy the search conditions.

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
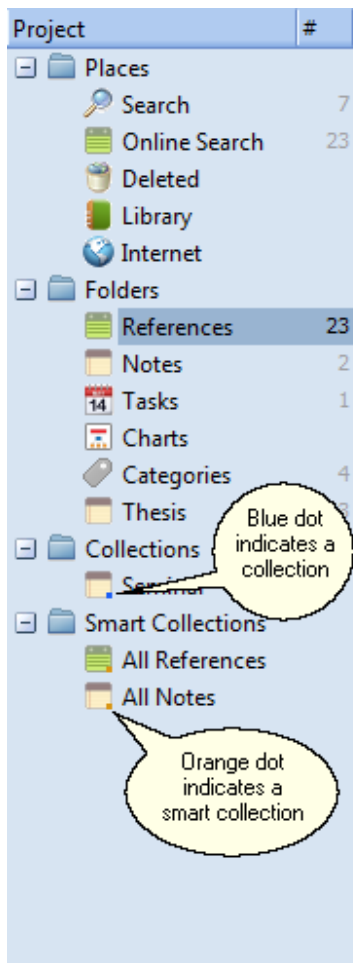
Folders are the most basic organizing structure in Biblioscape. A folder in Biblioscape resembles a folder in your Windows file manager. Everyone is familiar with Widows Explorer. It is used to organize your files. All your files have to be under a folder. For an individual file, it can only be under 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. If you have such needs, you can use collections instead of folders.

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. Again, if you have such needs, you can use categories to tag records across modules. References, notes, tasks, and charts can then be viewed together under the category module.

Creating a folder

To create a folder, go to the "Home" tab. Under the "Projects" section, click the "New" button.

- **Name**: First, give your folder a name.
- **Module**: Next, select what kind of folder you want to create. There are 5 types of Biblioscape folders: References, Notes, Tasks, Charts, and Categories. If you just want to create an item in the projects tree to organize other folders under it, select "Container".
- **Kind**: There are 2 kinds of projects you can select: Folder and Collection. A detailed comparison between folders and collections will be shown right after this.
- **Description**: Enter some descriptive text about your folder. This may not be necessary if your database is for personal use only. For a shared database, a description will be helpful for others to know why this folder is created.

Using folders

Folders are the primary tool for organizing your research projects. Collections and smart collections are complementary tools. When you import records, the new records must be imported into a folder. Although you can manually add new records into a collection, the newly added records will be added to the last opened folder automatically. Since every records in Biblioscape must be under a folder. If you need to make your database available on the web with BiblioWeb server, folders can be used to control user access privilege. You can assign Read and Write privilege to your web users for individual folders.

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 blue dot is added to the bottom right corner of the module icon to indicate this is a collection. 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 several folders into this collection. The references you dragged are not moved; Biblioscape just creates a link so that all those records can be retrieved easily.

For the references module, a collection does not bring more advantage compared to tagging records with categories. Both tools allow you to organize a record into more than one places. But for the other modules, records can be organized in a tree structure and ordered manually with drag and drop. A collection will be more useful than tagging with categories because records can have separate parent child relationship and ordering. For example, in the original folder, note B is the child of note A. But under a collection, note A and note B could be siblings.

Creating a collection

Creating a collection is the same as creating a folder except "Collection" is selected after the "Kind:" label. You can go to "Home | Projects | New". Enter a collection name, select "Collection" as the folder kind, and click the OK button.

Folders vs Collections

Since folders and collections are similar, you may want to know how to decide wether 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 automatically and be put into the current collection as well. When you import records, only folders are listed as possible destinations.

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
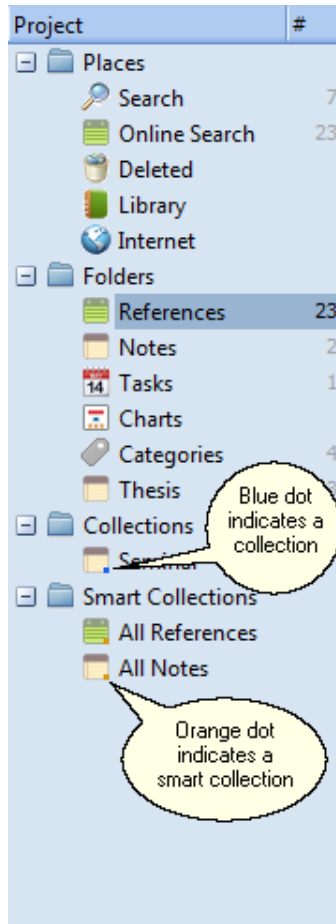
Folders are the places to add or import records. Collections are created to collect records from several folders. Both folders and collections represent a project, or something you need to accomplish. They are also static, which means that records have to be added to a folder, or dragged to a collection. 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 orange dot in the bottom right corner of the module icon.

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 action button and select "Add as Smart Collection". Enter a name for the new smart collection, and it will be added under the "Smart Collection" container of the project tree.

In the example, an advanced search is built to find all references authored by "Gilman" that is published before 1988. Press the Enter key to run the advanced search. Click the action button and select "Add as Smart Collection". You can give it a name like "Gilman old works" and save it as a smart collection. As your database grow, you may collect more references that satisfy the query. That is why it is called a smart collection.

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   Importing references 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 Biblioscape is through "Direct Export". It is supported by many online databases. You can go to http://www.endnote.com/endnote_export.asp to see a list of sites that support Direct Export. After finishing your search, select the references you want to save. Click the "Direct Export" button or hyperlink, please see. 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, etc. Biblioscape supports Direct Export as well. In most sites that support Direct Export, the word "Direct Export" is not shown. Instead, the sites will offer users to export search hits to a reference manager. EndNote and Reference Manager are always listed. If you click EndNote or Reference Manager, the references will be automatically imported into Biblioscape if you choose so.

Add Direct Export support in IE

Biblioscape adds Direct Export support when it is first installed by associating certain file types with Biblioscape. If you have installed other reference management softwares later, the file types may become associate with another application. To make those file types become associated with Biblioscape again is easy. In Biblioscape, go to "Home | Options". On the "References" tab, click the button "Associate with Biblioscape" under the label "Direct Export support in web browser".

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. Next, click a Direct Export link to configure and test it. Let's go to a free site http://www.bmj.com and do a search. Click the hyperlink "
Download all citations on this page to my citation manager". You will be prompted to select which program you want to import the records into. Click "EndNote".

You will be prompted with the following window. Next to "Open with", select "Biblioscape Version 9". Check the box "Do this automatically for files like this from now on", Click "OK". Your references in BMJ will be automatically imported into Biblioscape.
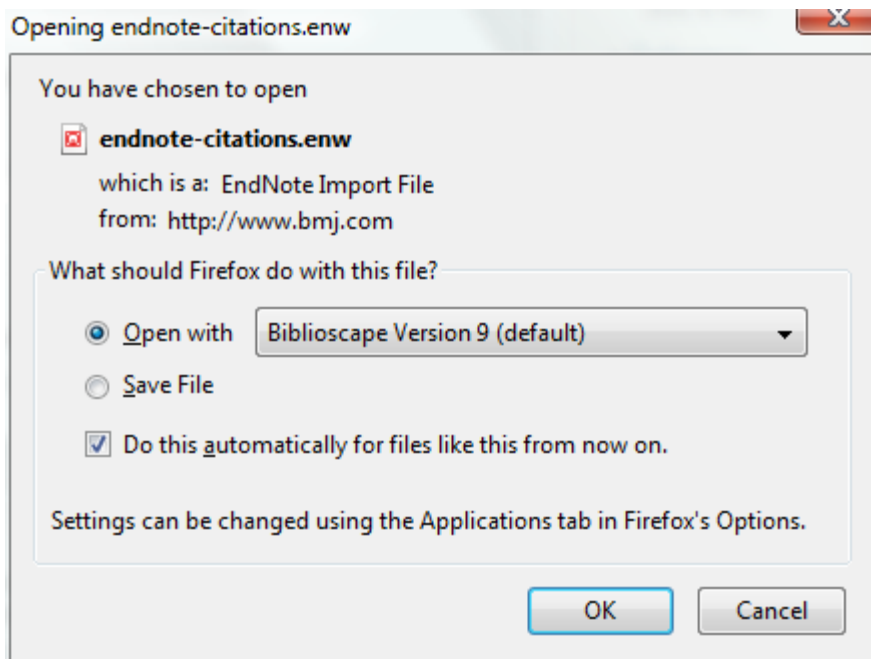
Add Direct Export support in Chrome

With Google Chrome, after you click the export records to EndNote or Reference Manager, a file is downloaded and shown at the bottom left corner. If you click on the downloaded file

button, it will be opened by associated application. If the file type is associated with Biblioscape, the records will be automatically imported into the last opened references folder.

Add Direct Export support in Opera

In Opera, go to: "Tools | Preferences | Advanced | Downloads". Click Add, and make these entries in the fields:

MIME Type: **application/x-endnote-refer**
File Extension: **enw**
Open With Other Application: **Biblioscape.exe**

Click OK.

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.
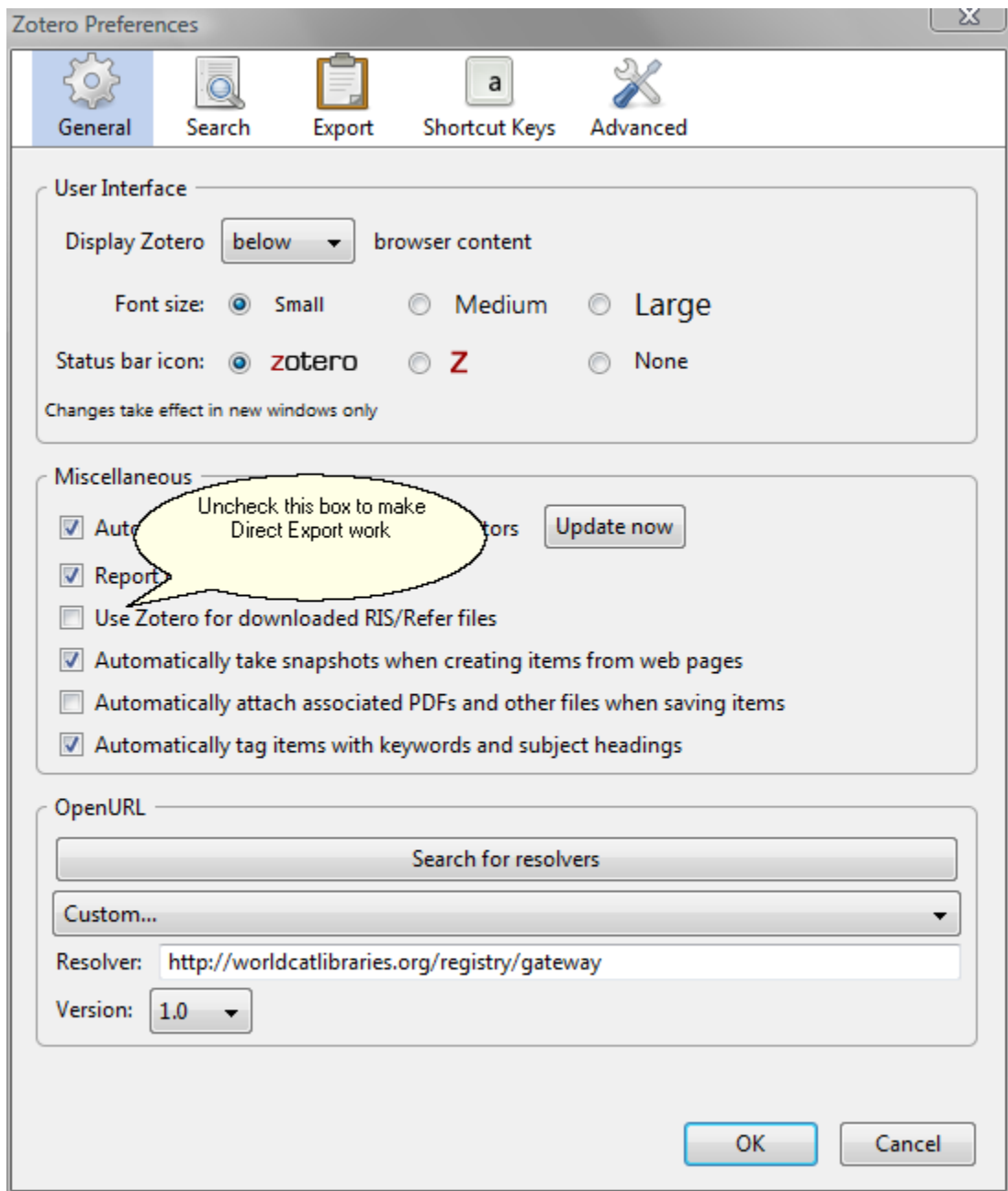
Import from the Web without Direct Export

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 Biblioscape, you can import Refer files, RIS files, and Ovid export files directly into Biblioscape. All refer files that end with *.brf will be associated with Biblioscape. You can double click this file, and it will be automatically imported into Biblioscape. 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 Biblioscape. You can double click those files. Biblioscape will automatically import those files with the correct import filter.

4.2 Capturing references from the integrated Web browser

In the previous section, we talked about how to capture references through Direct Export. This approach works with any major web browsers including IE, FireFox, and Chrome. There are also lots of web sites that do not support Direct Export. To capture references from these sites, you have to save the web page as a plain text file and then import it into Biblioscape. This approach takes several steps. With Biblioscape integrated browser, you can combine the save and import steps into one by setting up a web resource list. Let's use PubMed as an example to see how to capture references using the built-in browser.

Capture references using Biblioscape integrated Web browser

In the projects pane, click "Internet" under the container folder "Places". Biblioscape will open the built-in web browser. Under the "Internet" Ribbon tab, click "Reference Resources". Select "PubMed" from the resources list.
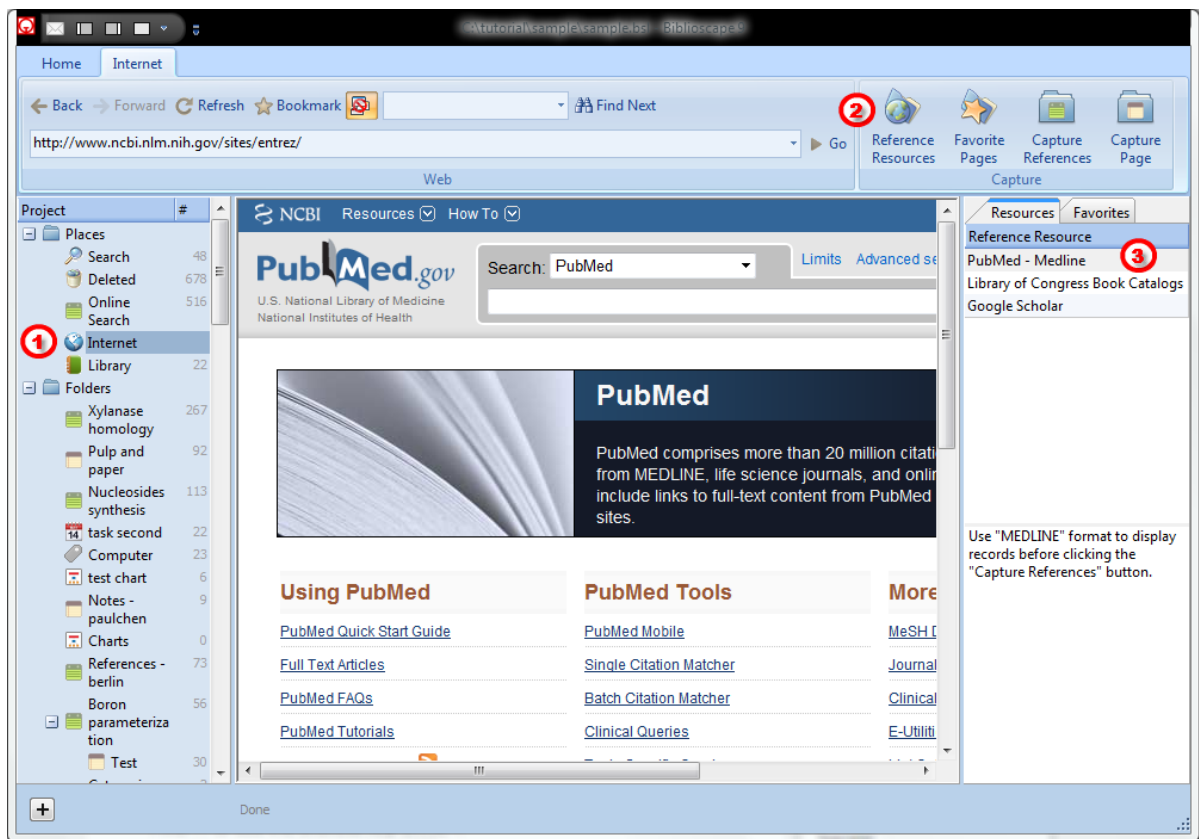
Perform a search at PubMed. When the search hits are displayed, click "Display Settings" and select "MEDLINE" as the display format. This instruction is shown in the top box when you select a web site from the resource list. Now click "Capture References" under the "Internet" Ribbon tab. Biblioscape will automatically capture the displayed records into the last opened references folder.

Manage the web resources list

To successfully capture bibliographic records from a Web page, you need the right import filter. Biblioscape 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. To see the detail of a web resource item, click the right mouse button on the resources list and select "Edit".

- 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. When adding a new resource item, you need to know which import filter to use. First display your search results in a tagged format. Then save it as a plain text file instead of the default html format. Go to a references folder in Biblioscape and click "Import" on the "References" Ribbon tab. Select the file you just saved and click "Suggest" to let Biblioscape finds the best matching import filter. If no desired import filter is available, you have to create a new import filter for your source.

- 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.

You can add more web resource items to the resources list by clicking the right mouse button and select "Add". Or you can delete an existing item by selecting "Delete".

4.3   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.

1. Go the folder where you want to add the new reference. Click the Quick Add button on the "References" Ribbon tab or the "+" button on the status pane 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 icon is shown in the attachment column, 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 icon will be shown.

4.4   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. The first reference under the "Related" tab is the one you selected. You can click the "Cited by ..." hyperlink to see a list of references that cited the selected reference. 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. 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.

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.

4.5   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.

4.5.1   Collecting references by Web Search

To access "Online Search", you can click the "Online Search" button in the "References" Ribbon tab, or click the "Online Search" item under "Places" in the project pane. Click the "Web" tab at the top of the "Online Search" tab; you can now search some of the most popular citation databases on the Web. The search engines in the list cannot be customized by end users.
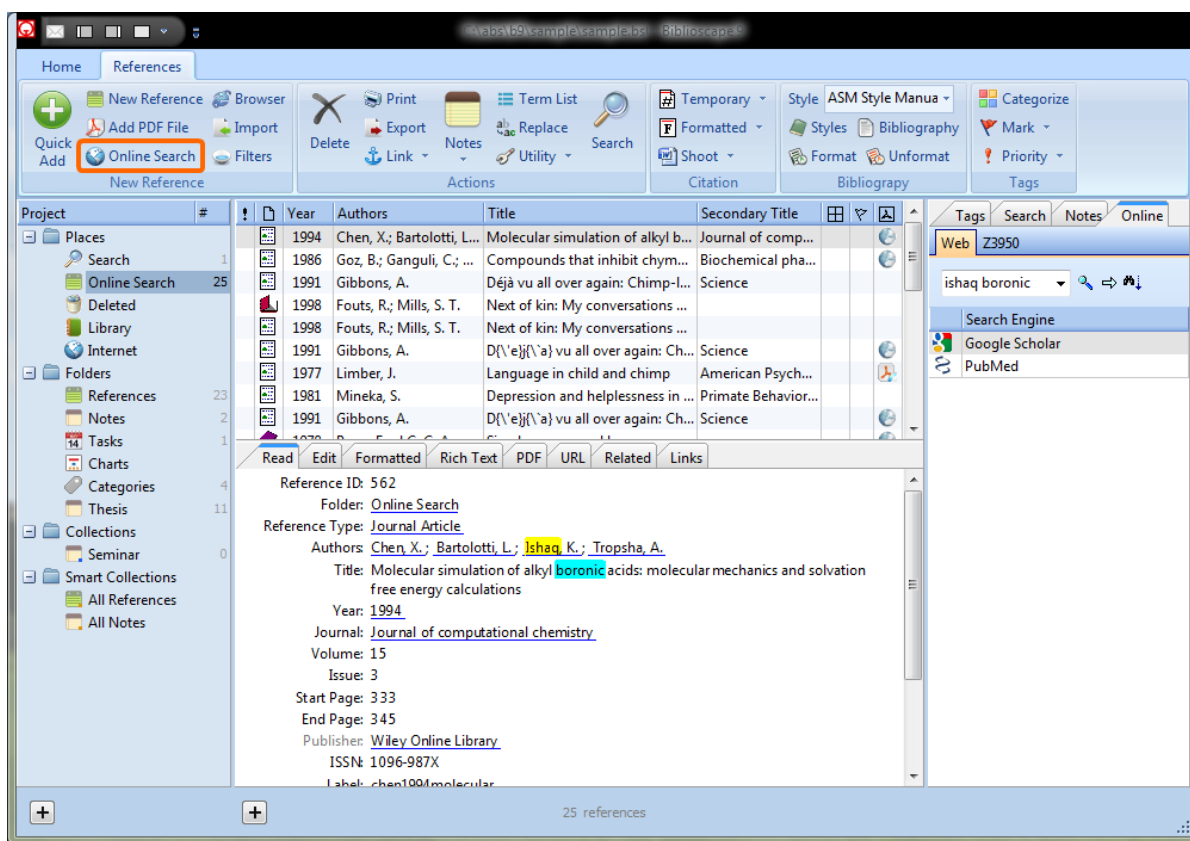
1. First, you need to select the search engine to use. Google Scholar is the most popular one. It covers many subject areas in both the hard and soft sciences.

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. Biblioscape will automatically capture the first batch of your search results and put them in the "Online Search" folder. For Google Scholar, one reference is downloaded per batch. For PubMed, 10 references are downloaded per batch.

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:
- 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.

4.5.2   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" button on the "References" Ribbon tab, 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 are 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 once there are too many unwanted records.

4.5.3   Using a barcode scanner to enter a reference
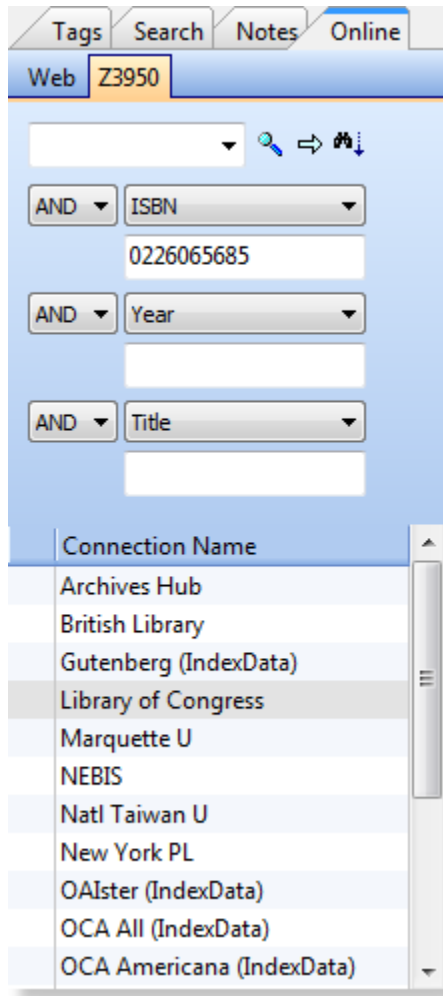
If you have a low cost barcode scanner, you can use it to scan the barcode of the ISBN number on the back cover of your book. This number can then be used to run a search and capture the hit directly into your Biblioscape database. Therefore, you can enter the bibliographic data of your book collection into your Biblioscape database without typing.

1. In the references module, click the "Online Search" button in "References" Ribbon tab.

2. In the "Online Search" tab on the right. Select the "Z39.50" tab at the top.

3. Select the Z39.50 source "Library of Congress". You can also use another Z39.50 source if you prefer. Click the "Advanced Z39.50 search" button ↓ and select the "ISBN" field.

4. Next, enter the ISBN number with a barcode scanner or by typing, click the Search button to run the search. If there is a hit, Biblioscape will automatically capture the bibliographic record and put it into the references folder "Online Search". You can then drag and drop it to references folder for keeping.

1.

4.5.4   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. In references module, click the "Online Search" button in the "References" Ribbon tab. Click the "Z39.50" tab at the top. Double click any item to bring up the Z39.50 Connection window.

2. On the "General" tab, you have to enter many parameters. The most important one is

the "Import Filter".
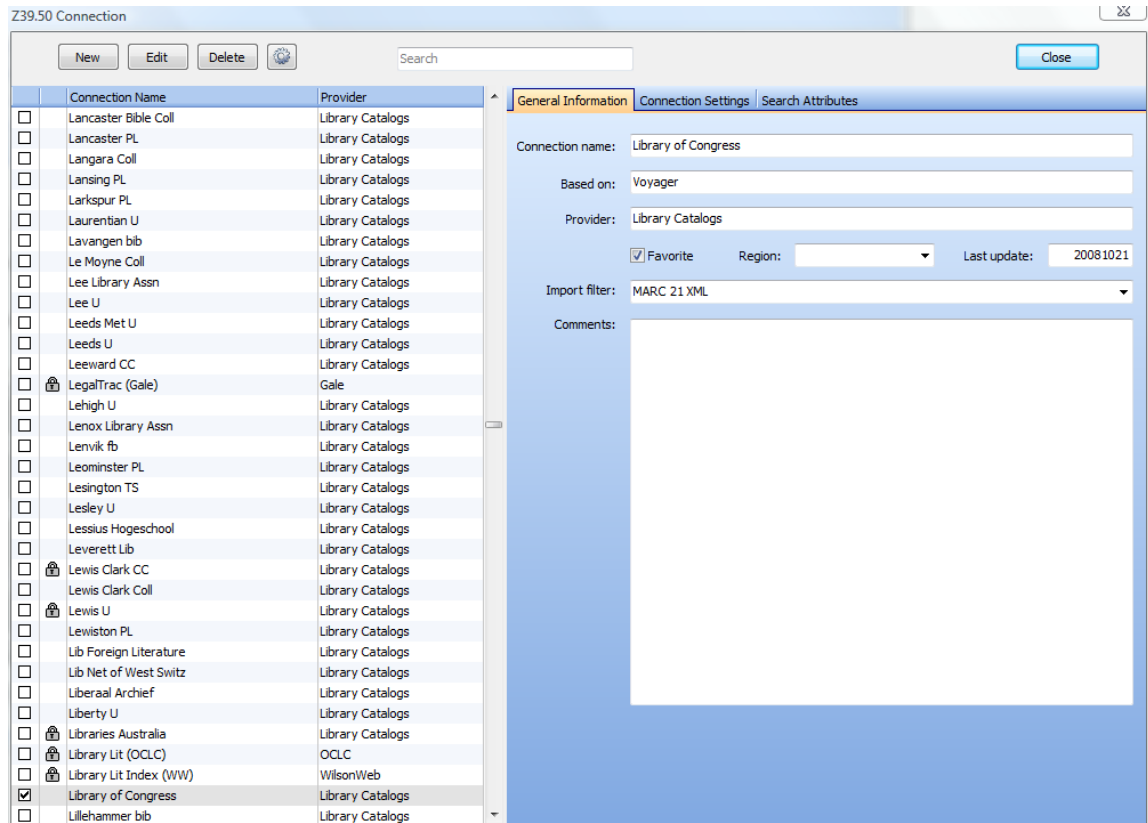
- o   Connection name: Enter a name for your Z39.50 connection. This name used for you to remember a connection, so you can use any name. Most connections in Biblioscape use a library's abbreviated name.

- 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, Biblioscape 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.

| General Information | Connection Settings | Search Attributes |

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:

☐ Login Required

User ID:

Password:

Group ID:

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.

Field Name	Use	Relation	Position	Structure	Truncation	Completeness
Any Field	1016					
Author	1003					
Year	31					
Title	4					
Subject	21					
Series Title	5					
Publisher	1018					
Place of Publication	59					
ISBN	7					
ISSN	8					
LCCN	9					
Personal Name	1					
Corporate Name	2					
Conference Name	3					
Subject Personal Name	1009					
Uniform Title	6					
Language Code	54					

4.6   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 clicking the "Options" button on the "Home" Ribbon tab. On the "Options" window, go to the "References" tab. After you select a reference type, the data field labels will change accordingly. Enter the data for all the relevant fields.

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. Select the reference which you want to duplicate.

2. Click the right mouse button and select "Create Duplicate".

3. After a duplicate record is created, change the field values that are different among the two references.

4.6.1   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 while reading a reference. This will be explained in detail in the next chapter, "Taking Notes". To open the reference editor as a separate window, double click the selected reference. Make necessary changes and click the window's "Close" button to save changes.
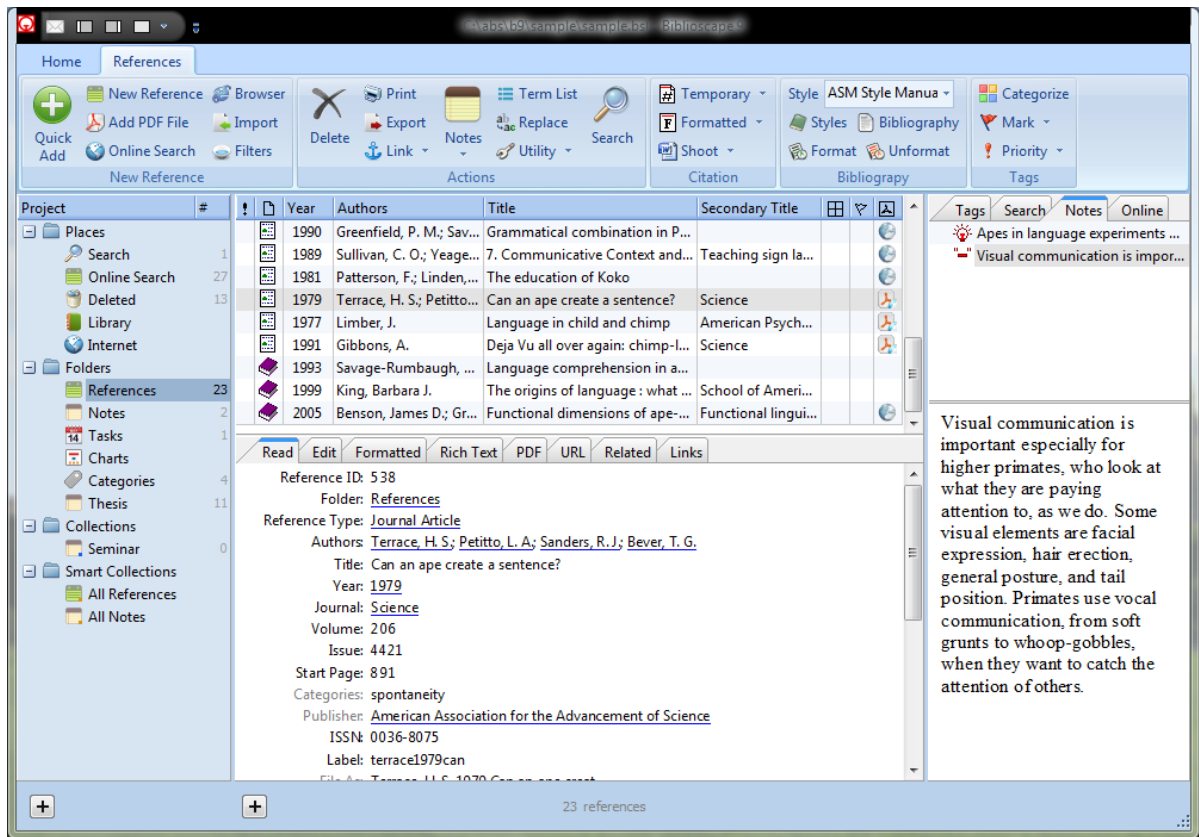
Edit a reference in live preview

When you are in a reference list, the selected reference can be displayed in the preview panel. The default tab in the preview pane is "Read". You can edit text here but the changes will not be saved to the database. Only under the "Edit" tab, the changes you make will be saved to the database.

Add a PDF file to a reference folder

If you have the full text of a journal article in a PDF file, you can add it to a reference folder by clicking the "Add PDF File" button under the "References" Ribbon tab "New Reference" group. Select the PDF file and click "Open". Biblioscape will create a new reference record and try to fill the data fields if possible. The content of the PDF file will be added under the "Rich Text" tab as plain text. So the content of the full text become searchable. You can then go to the "PDF" tab to read the full text and taking notes if needed.

4.6.2   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 filed 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_numer: 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.

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 becomes 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.

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.

Biblioscape 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 Biblioscape 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.

4.6.3   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 "Options" under the "Home" Ribbon tab.
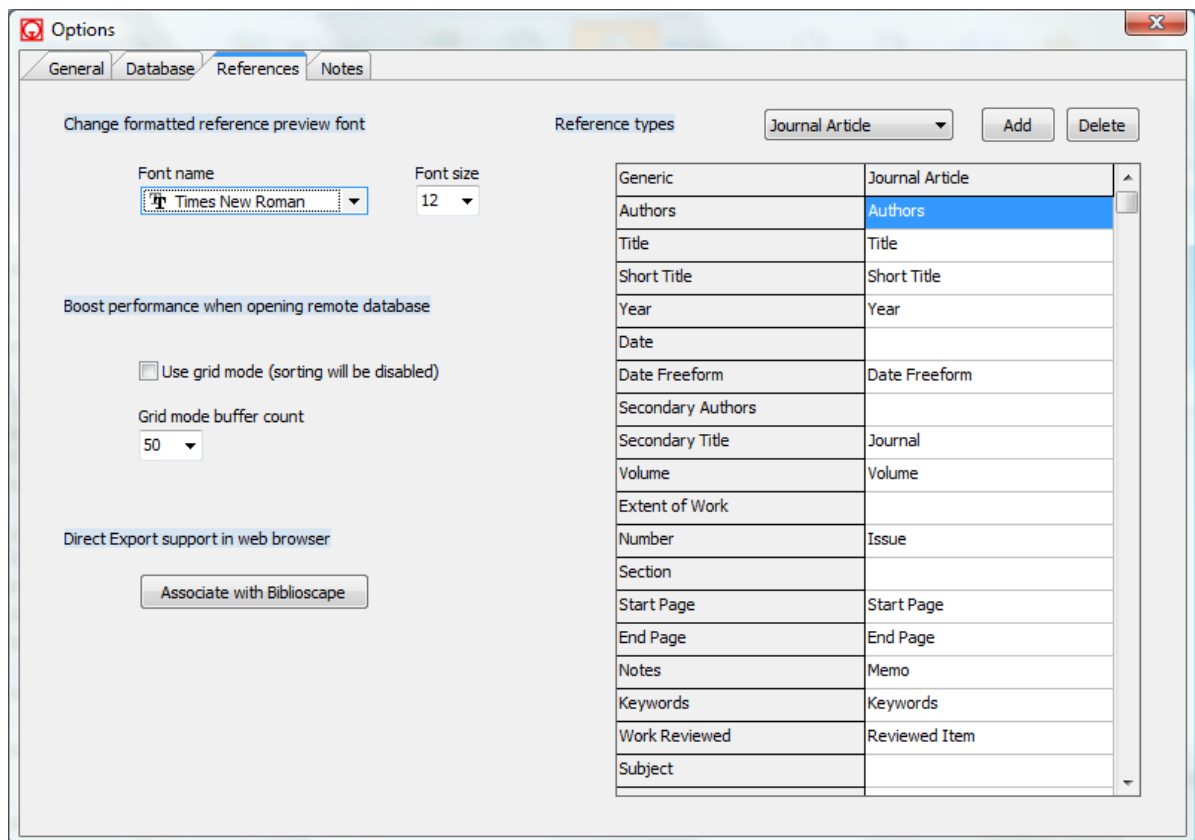
The first column lists all the data field names in the reference table. The second column lists

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.

4.7   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.

Besides importing search results from the Web, Biblioscape can also 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 more than a thousand pre-made output styles in Biblioscape. 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.

4.7.1   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.

4.7.1.1   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. Biblioscape provides many import filters for such cases. You can browse the import filters list by clicking the "Filters" button under the "References" Ribbon tab "New Reference" group. 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.

4.7.1.2   Import formatted references in a bibliography

In the past, Biblioscape 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 pro
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.

Biblioscape 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, etc. Biblioscape will use the Internet to look for your

references and import them. If the full text of a reference is available on the Web, Biblioscape 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. Biblioscape can only import a file in plain text format.

3. In Biblioscape, select the reference folder where you want to import the file. Click the "Import" button under the "References" Ribbon tab "New Reference" group.
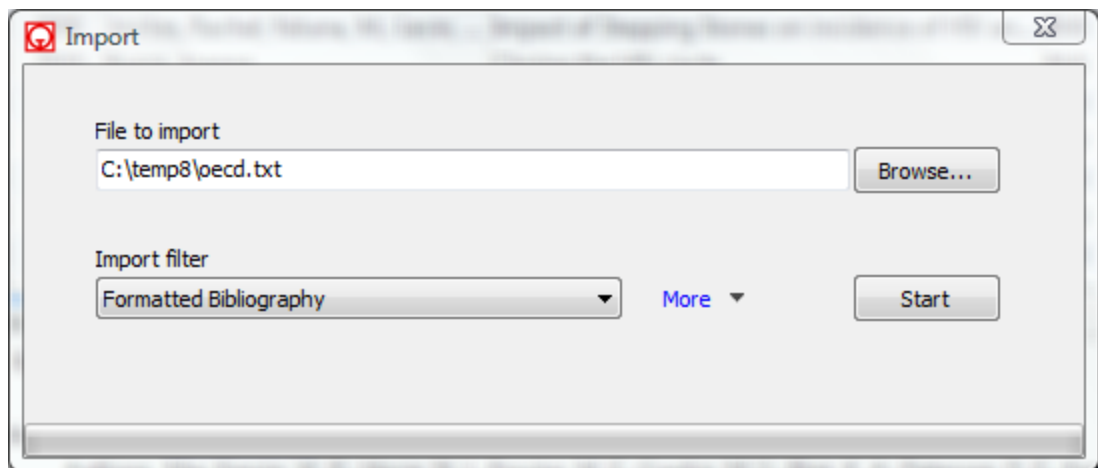
4. Click the "Browse..." button and select the plain text file you want to import.

5. Select "Formatted Bibliography" from the "Import filter" list. "Formatted Bibliography" is the first one in the list.

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 may take some time. But this new feature still will save you a lot of time because formatted references could not be imported in the past.

4.7.1.3   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 database (Access, DBase, Paradox), 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 the "Import" button under the "References" Ribbon tab "New Reference" group.

2. In the import window, click "Browse..." to select the import file.
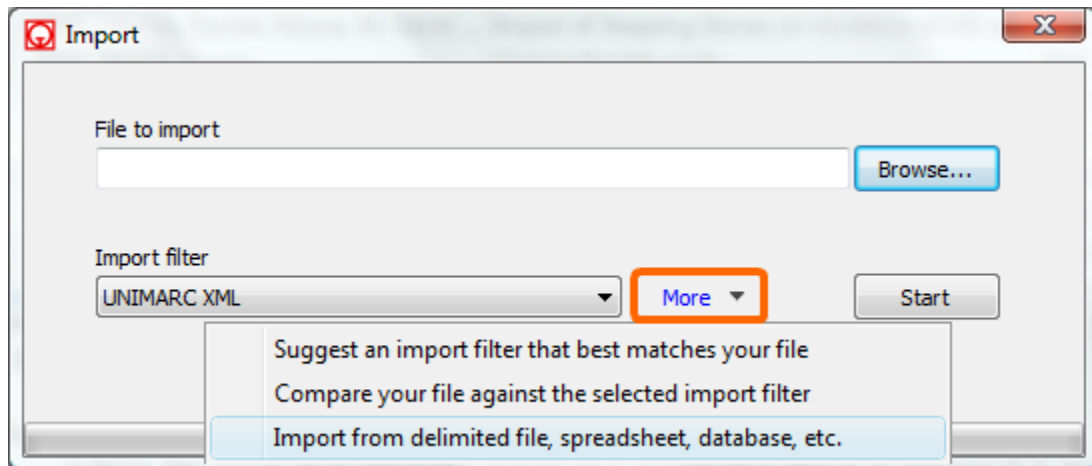
3. Click the "More" button and select "Import from delimited file, spreadsheet, database, etc." to run the wizard.

4. Under the "Spreadsheets/Workbooks" section, select "Excel file (*.xls)" and click "Next".
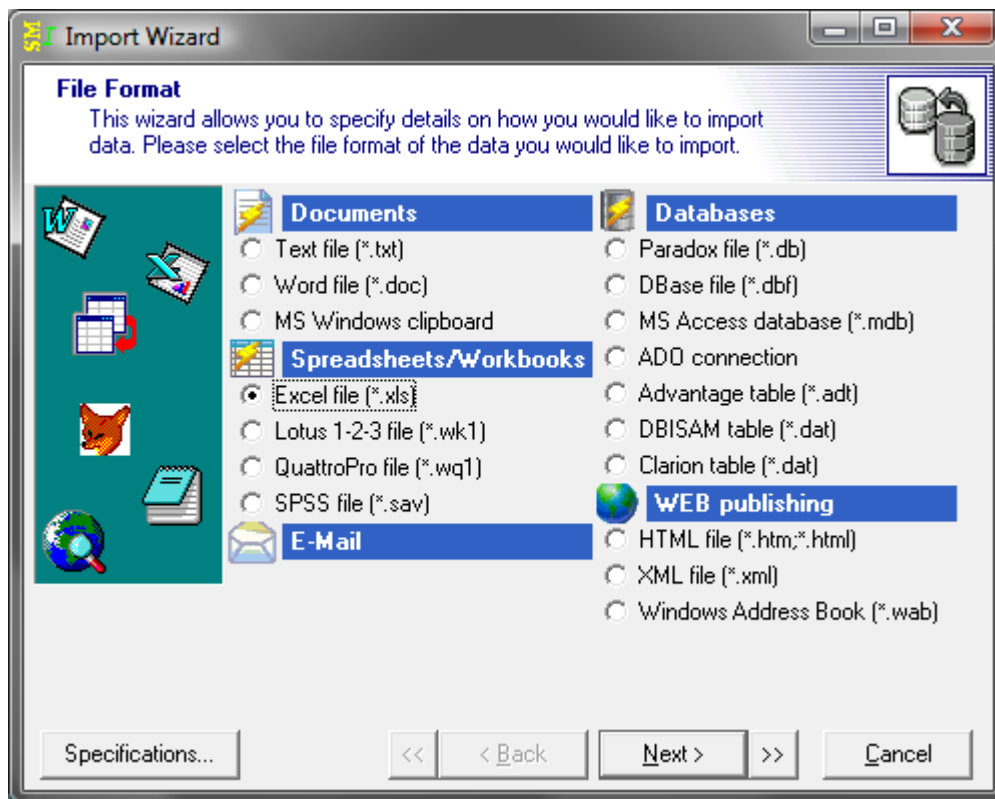
5. In the second step, select the Excel file you want to import. Click the "Next" button.
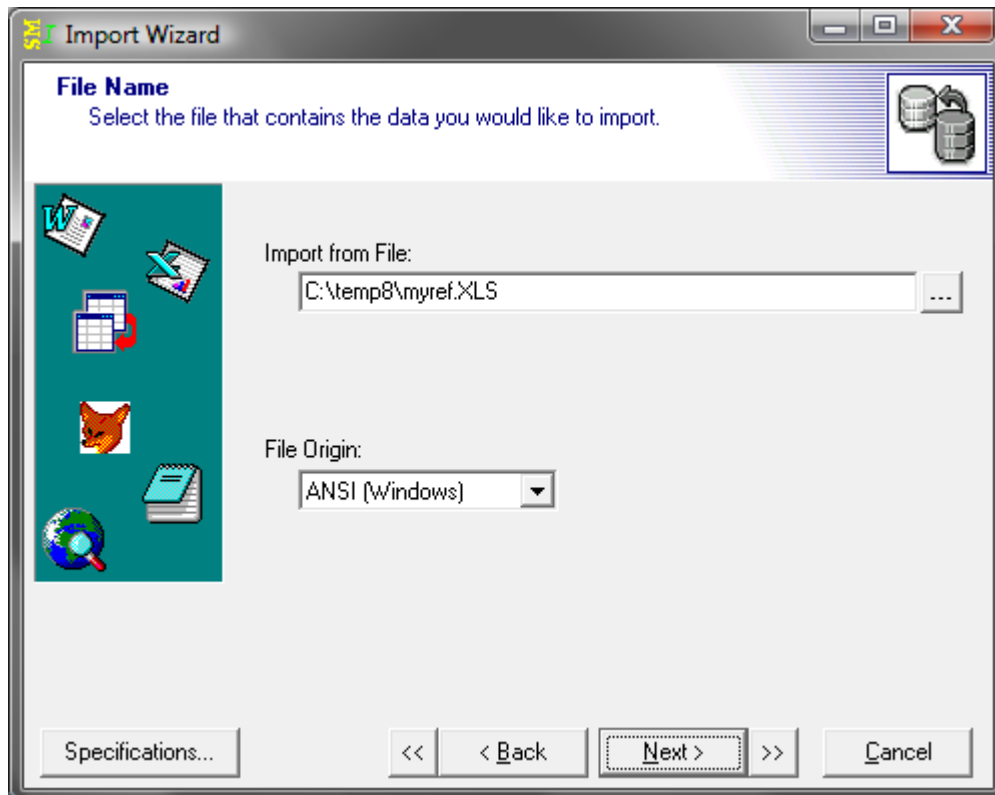
6. In the third step, you can change the formats of "Dates, Times and Numbers" to match the ones used in your Excel file. You can also specify the first and the last rows to import. By default, "First row:" is set to 1. The "Last row:" is left blank which means all rows will be imported.
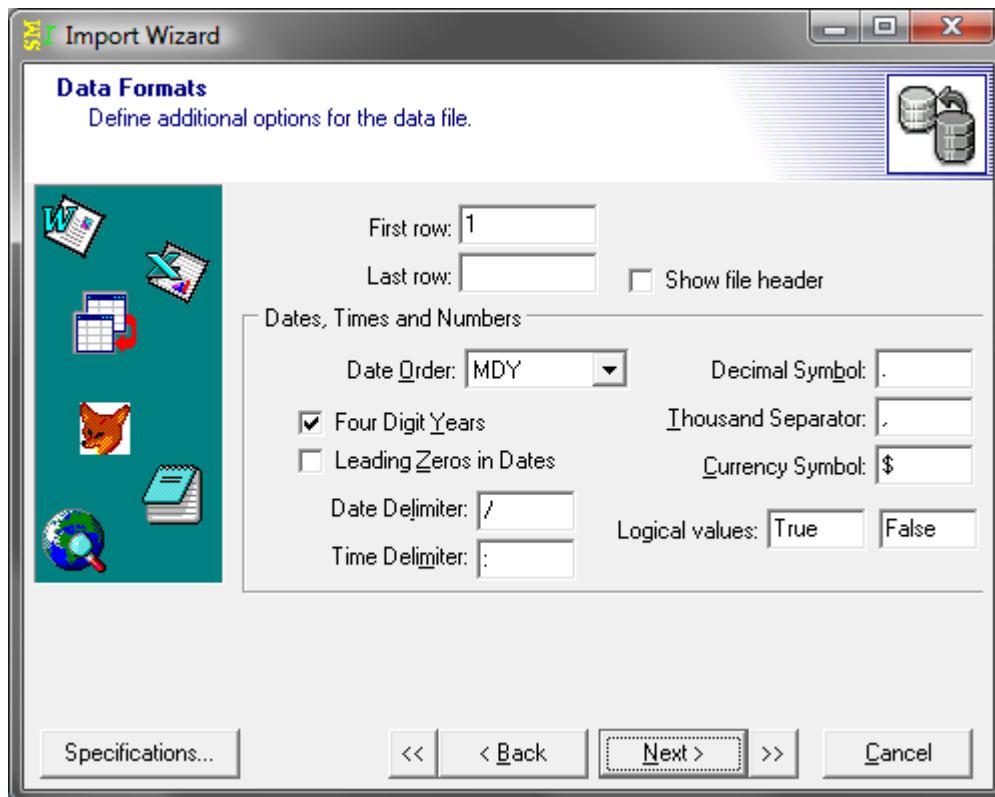
7. This is the most important step because you need to map each column in your Excel file to a Biblioscape database field. The columns are first shown un-mapped in alphabetical order.
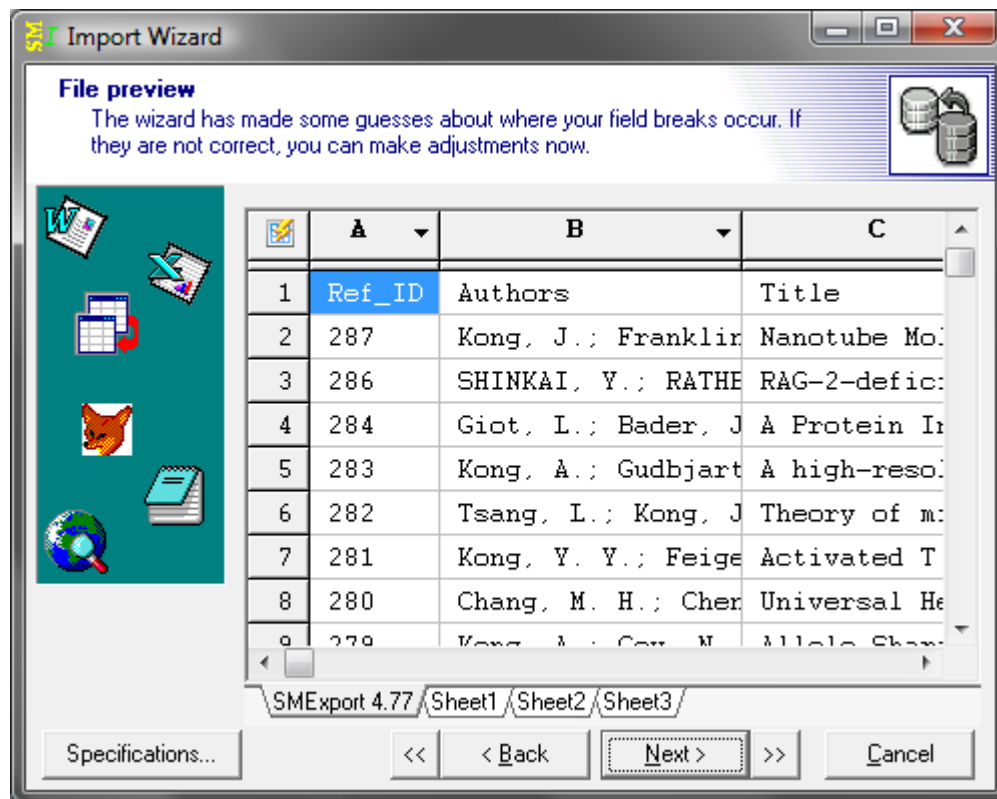
To map a column, click the down arrow in the column header. A popup list will be shown
to allow you to pick the matching Biblioscape database field name. Start from
Column A and map each column to a database field. After you map a column to a
database field, the column header will be changed to the database field name. Once
you finish mapping all columns, click the "Next" button.
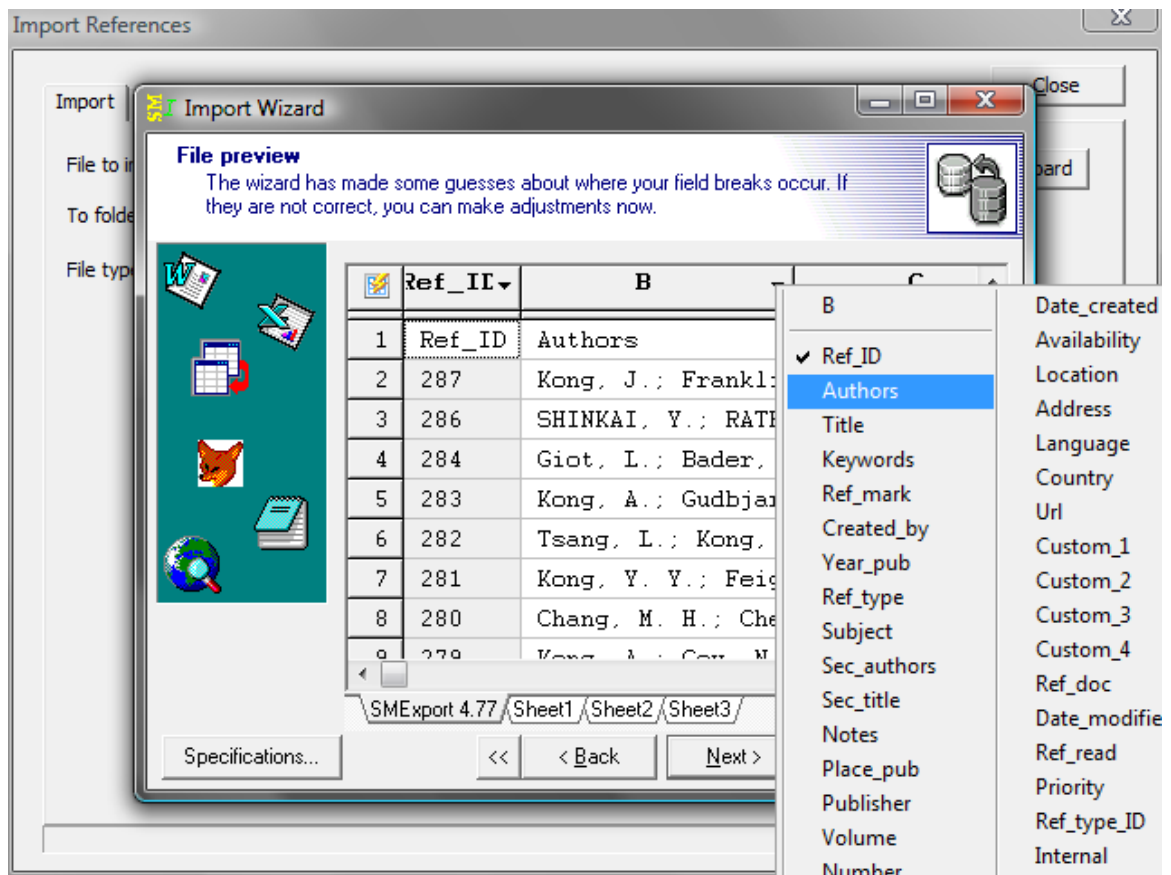
8. In this step, the mapped columns are displayed next to the database fields. You can chose a field as the key field, but this is not needed for importing into Biblioscape. If a column in your Excel file is not mapped to a database field, that column will be skipped during importing.
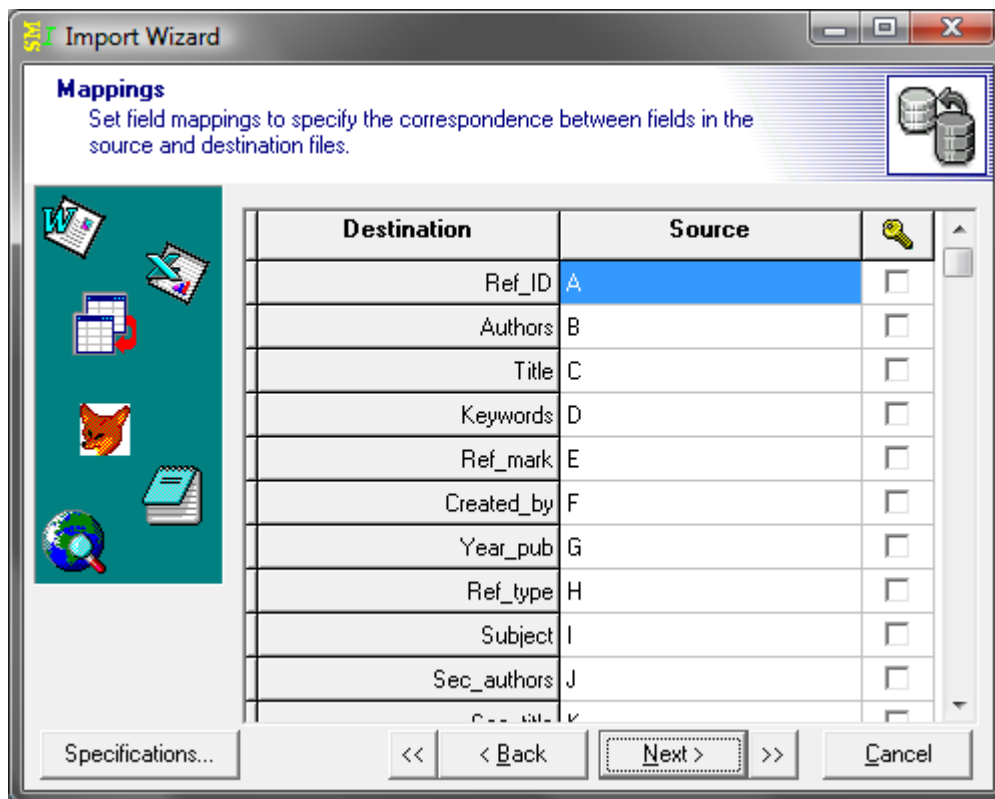
9. In this step, you can preview the mapped data, add conditions to load, or skip certain rows. Click the check box "Load when" and click the "..." button to add a condition for loading. Click the check box "Skip if" and click the "..." button to add a condition for skipping. For example, you can specify 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.
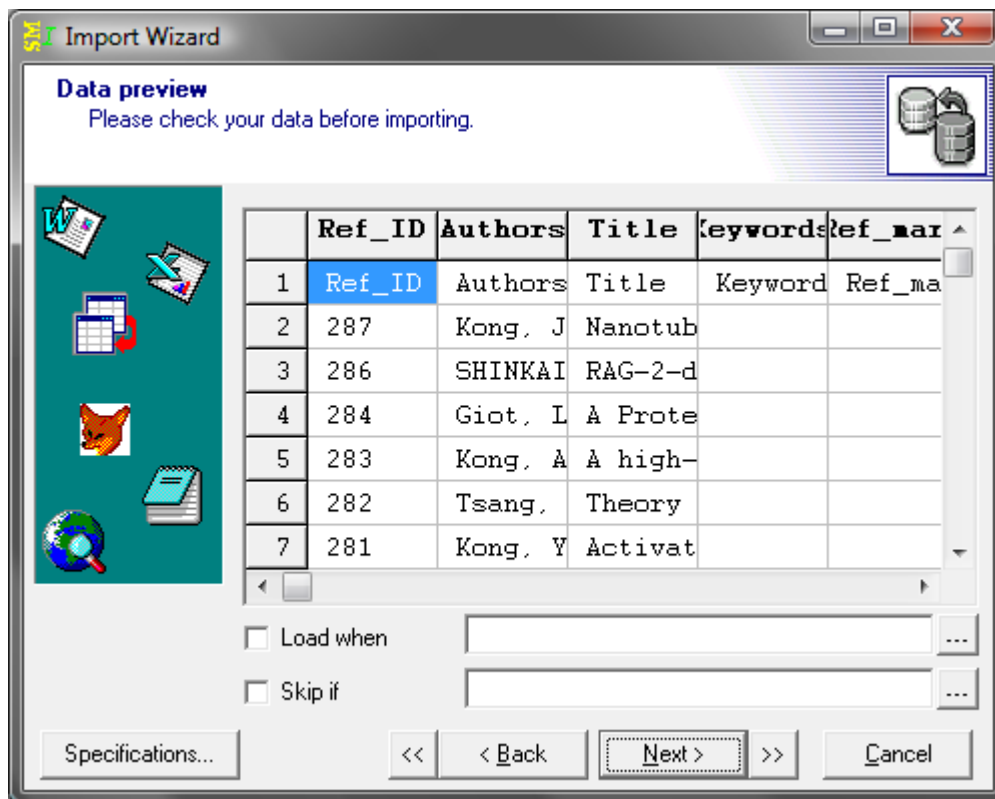
10. In the last step, choose the "Import mode". In most cases, you should use the default "Append: add records to the destination table". Click the "Execute" button to start the import process.

4.7.1.4   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 click the "Import" button under the "References" Ribbon tab and "New Reference" group.

3. Click the "Browse" button and select the file you exported in step 1. Select "Biblioscape Tag File" as the import filter. Click the "Start" button to import.

4.7.1.5   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".
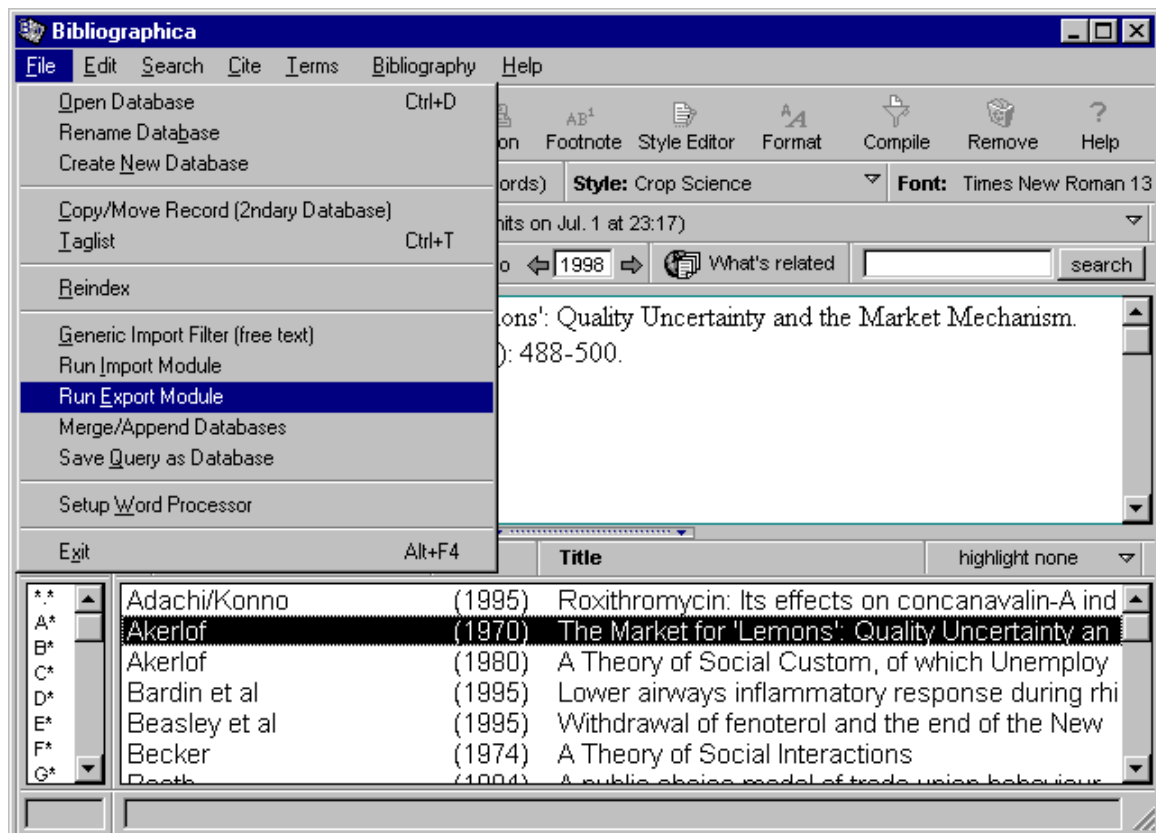
2. Click the "Open" button to select the Bibliographica database you wish to export, then select "Reference Manager (RIS)" as the "Export format". Click the "Start" button to start. A text file with the same name as the database will be created with ".ris" as a file extension. In our example, the file name is "asthma.ris" in the directory "D:\TEMP2 \ASTHMA\".
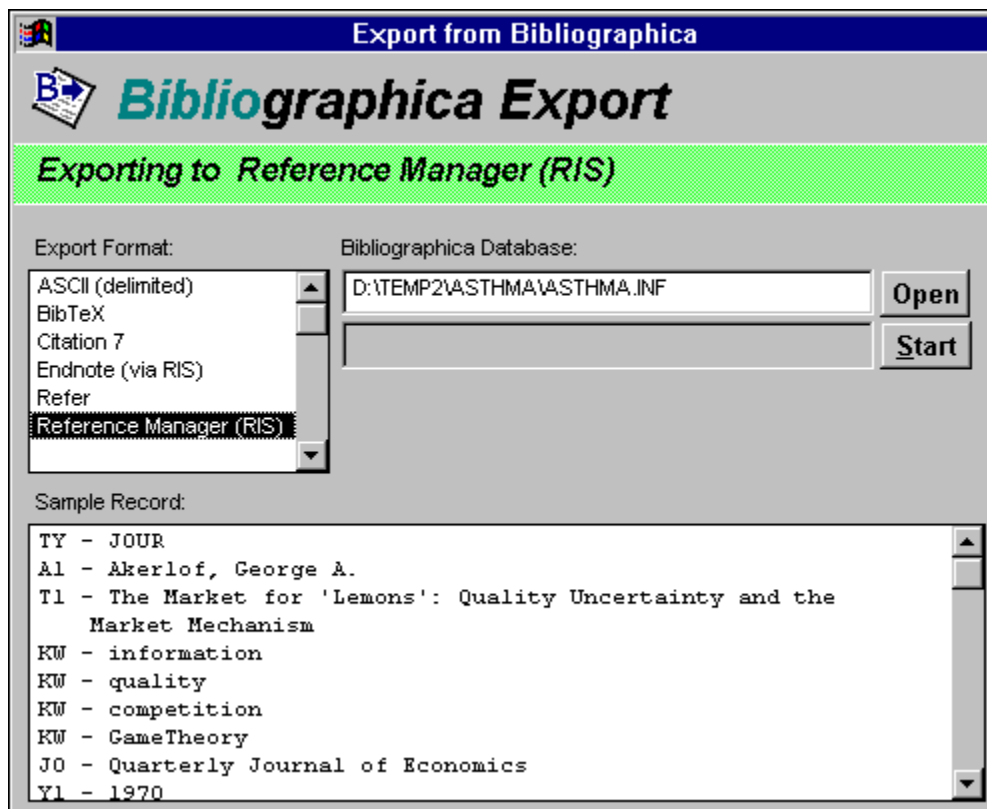
3. In Biblioscape, select the references folder where you want to import the records, and click the "Import" button under the "References" Ribbon tab "New Reference" group. Click the "Browse" button to select the file you exported in step 2. Select "RIS -- Reference Manager" as the "Import filter". Click the "Start" button to import.

4.7.1.6   **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. Click the "Export" button under the "References" Ribbon tab "Actions" group.

3. Click the "Browse" button to select the export folder and enter a file name.

4. Under "Export format", select "Biblioscape Reference Tag File".

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 click the "Import" button under the "References" Ribbon tab.

7. Click the "Browse" button and select the file just exported.

8. Select "Biblioscape Tag File" as the import filter.

9. Click the "Start" button to import.

4.7.1.7   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 click the "Import" button under the "References" Ribbon tab.

3. Click the "Browse" button to select the Citation database file.

4. Select "Citation" as "Import filter".

5. Click the "Start" button to import.

4.7.1.8   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.
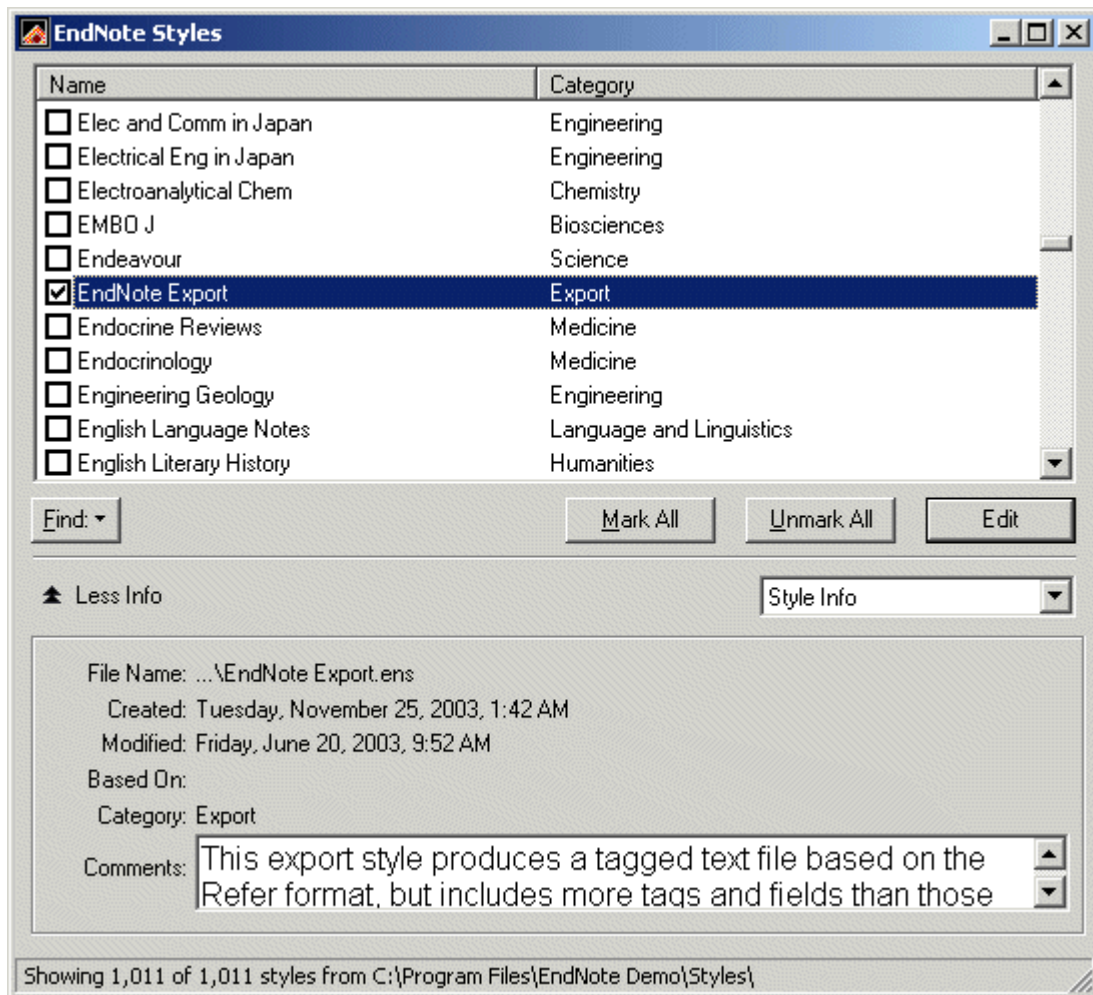
2. Next, we need to export the EndNote references as a text file. Inside EndNote, select "EndNote Export" as the "Bibliographic Output Style". For EndNote X2, this can be selected in the references window.

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

3. 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".
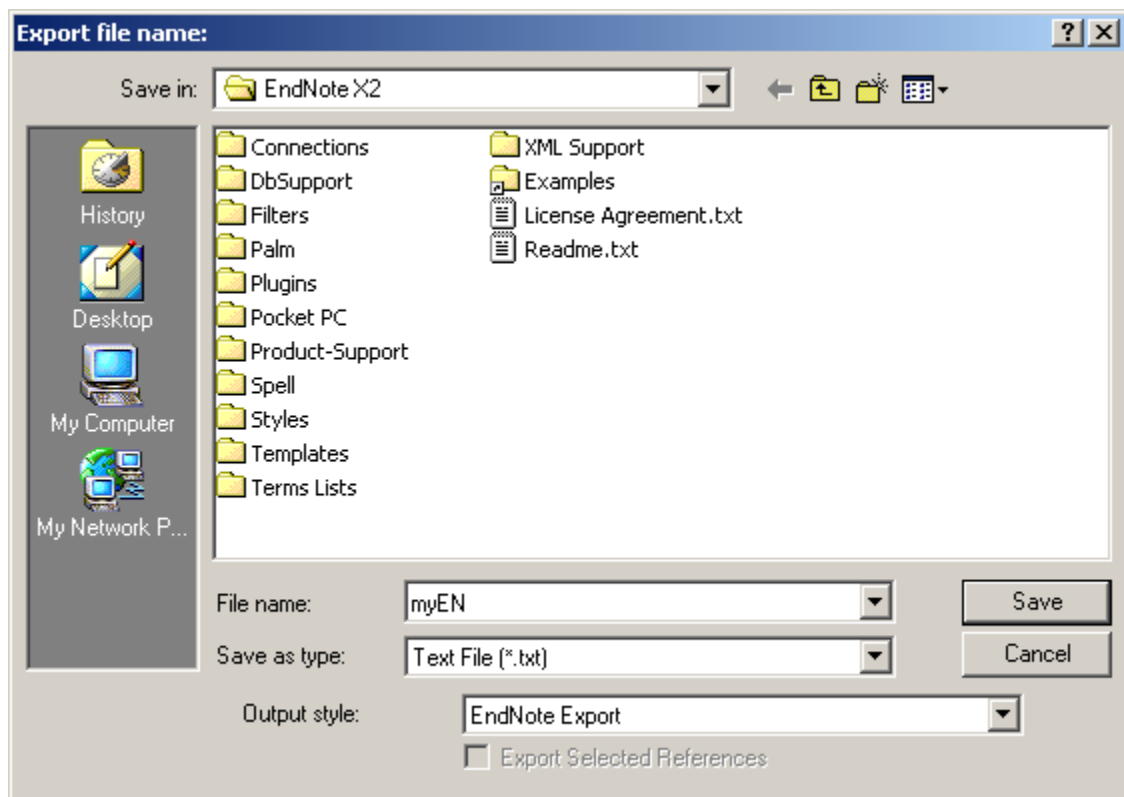
4. Click the "Save" button. The records will be exported as a text file in EndNote Refer format.

5. Start Biblioscape. Select the folder where you want to import the records. Click the "Import" button under the "References" Ribbon tab.

6. Click the "Browse" button and select the file you just exported from EndNote. Select "EndNote -- Refer" as the "Import filter".
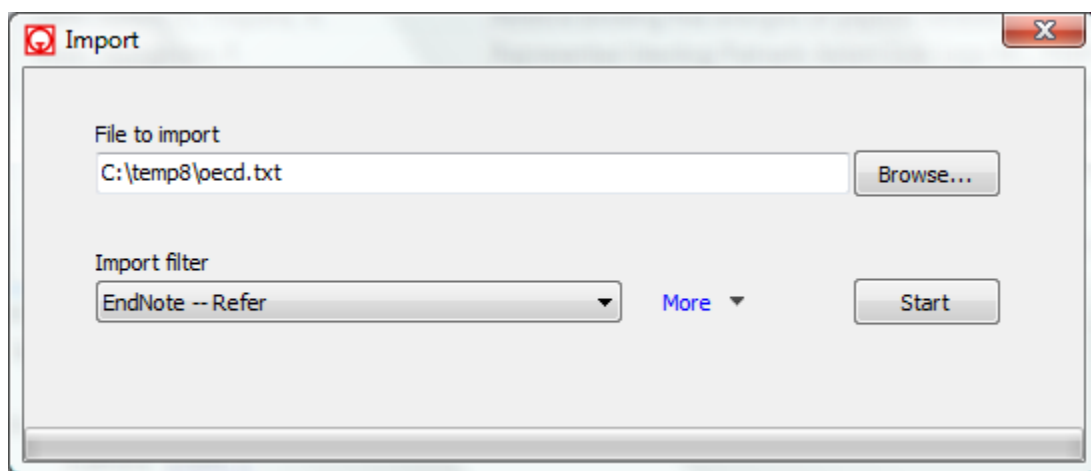
7. Click the "Start" button to import the records.

4.7.1.9 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
Fajltipus: File type
Meghajtok: Drive

1. Start NoteBuilder 1.04

2. Open database (.dat file)

3. From REPORT menu select Quick Report.
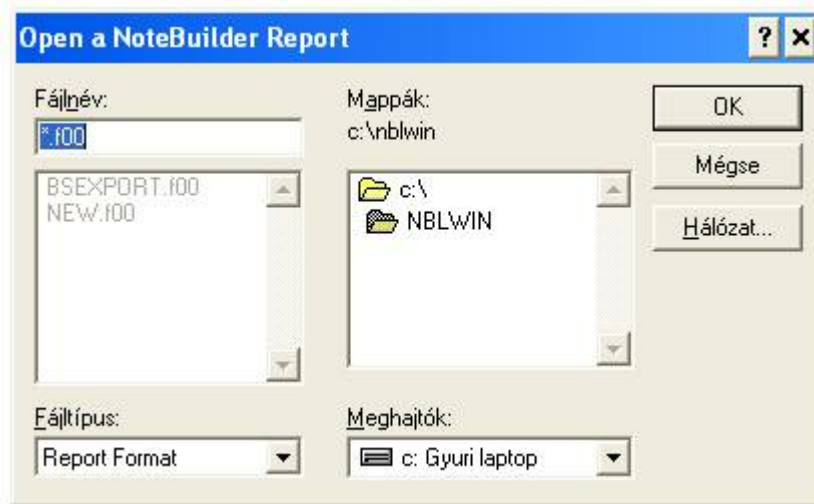
4. Enter a name (not longer than 8 characters). A .f00 file will be created.
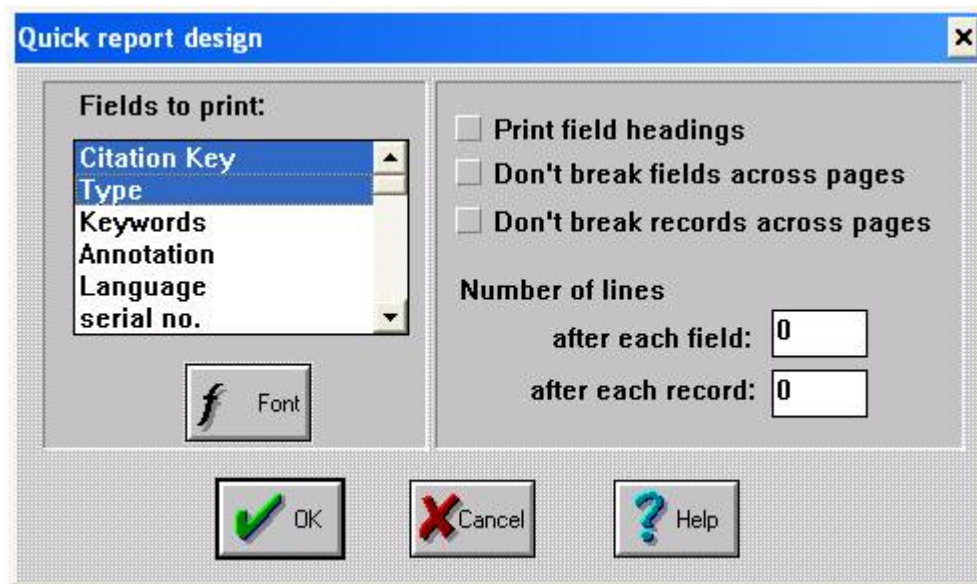
5. Check off the fields in the left box of the screen you want to print. Select only those you really want.

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
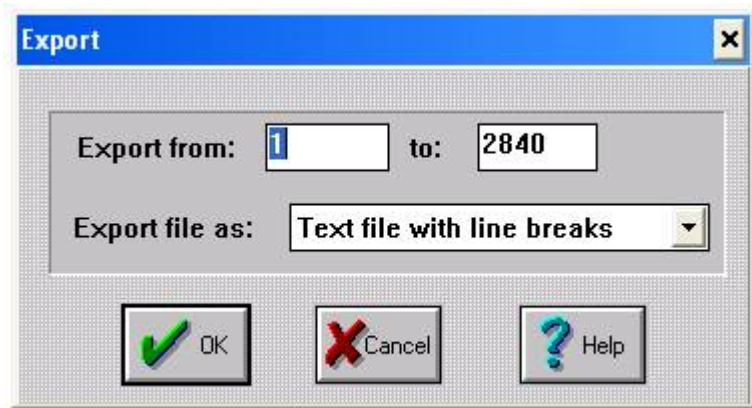
14. Select numbers in the options box „ Export from [number] to [number]". Default is the first and last number of your records in the NoteBuilder database.

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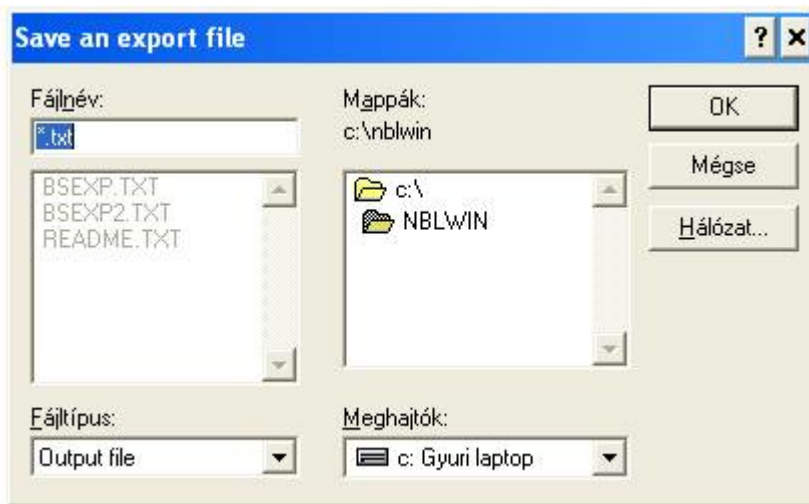
A Status window will appear as long as the file is prepared.

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.

4.7.1.10 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.
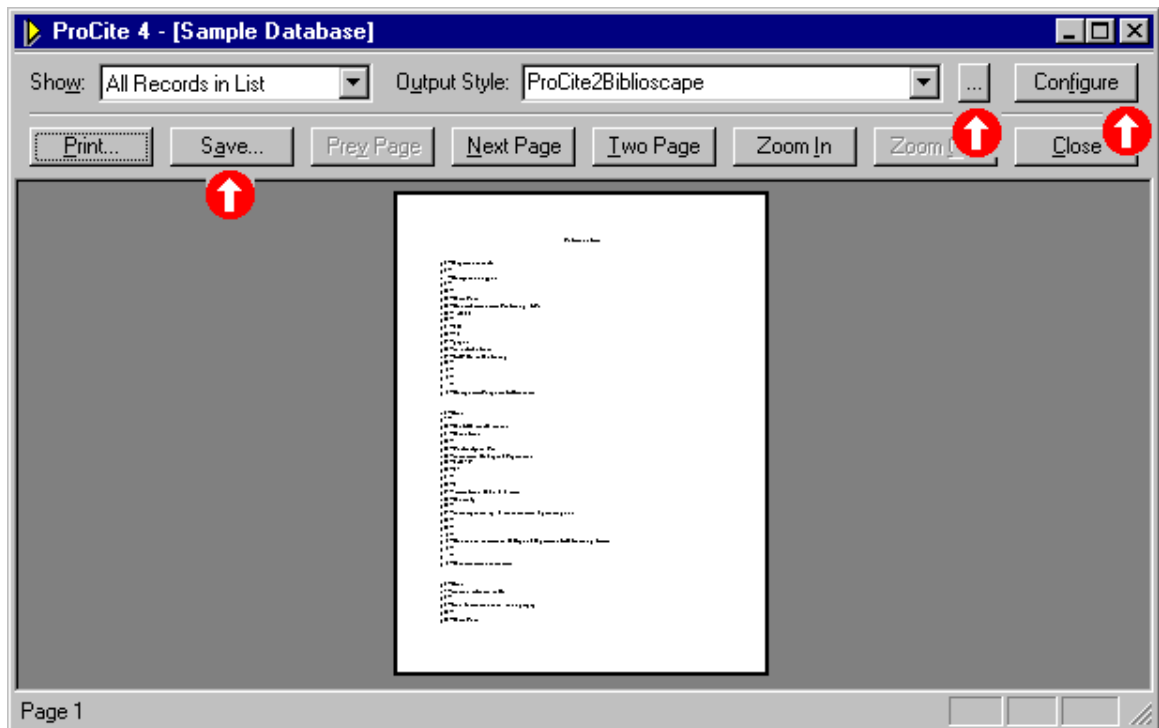
4. Click the "Configure" button, select the "Fields" tab, and check the boxes "Show Notes", "Show Abstract", and "Show Keywords". Click the "OK" button.
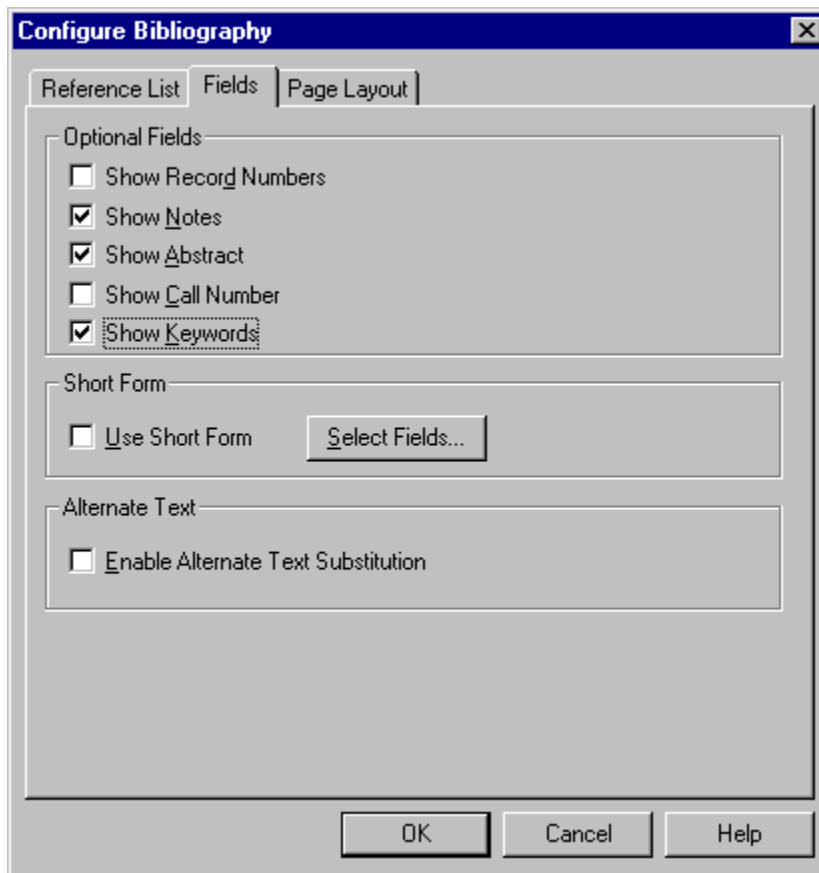
5. Return to the Print Preview window in step 3, and click the "Save..." button to save it as a text file. The default file type may be set as "Rich Text Format" after clicking the "Save..." button, so be sure to change it to the "Text" file format.

6. Start Biblioscape, 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 "ProCite2Biblioscape" 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 "ProCite2Biblioscape.pos" so that each of your customized workforms will correspond to a "Reference Type" in the Biblioscape database. You should put the appropriate Biblioscape reference type after tag "p0--" (see the screen shot below), and list all other fields under their corresponding tags, for example "p1--", "p2--", etc.
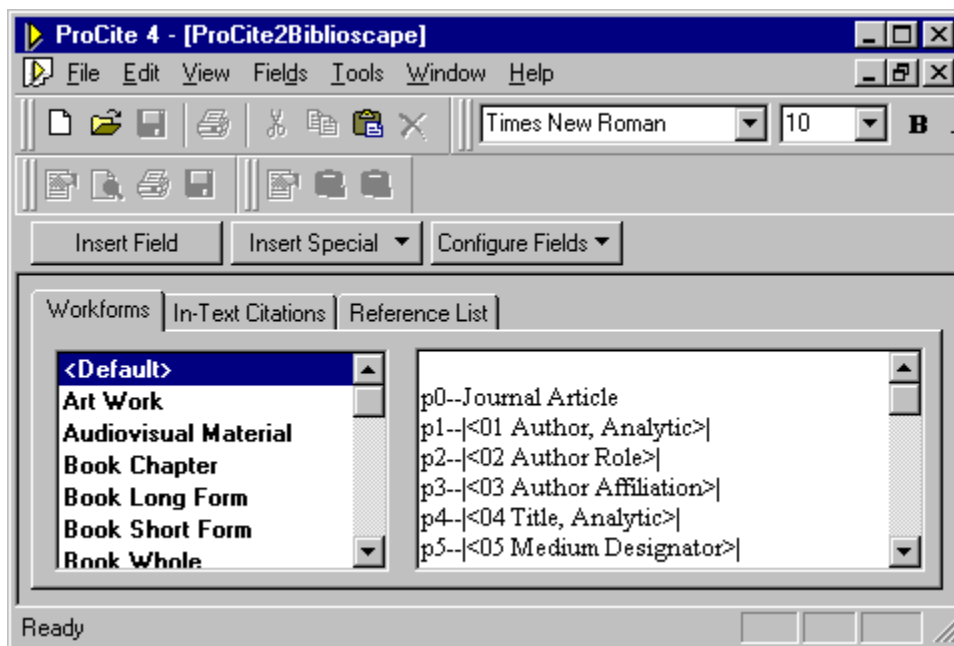
4.7.1.11 Import from Reference Manager

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

1. Start Reference Manager and click the menu command "References | Export...".
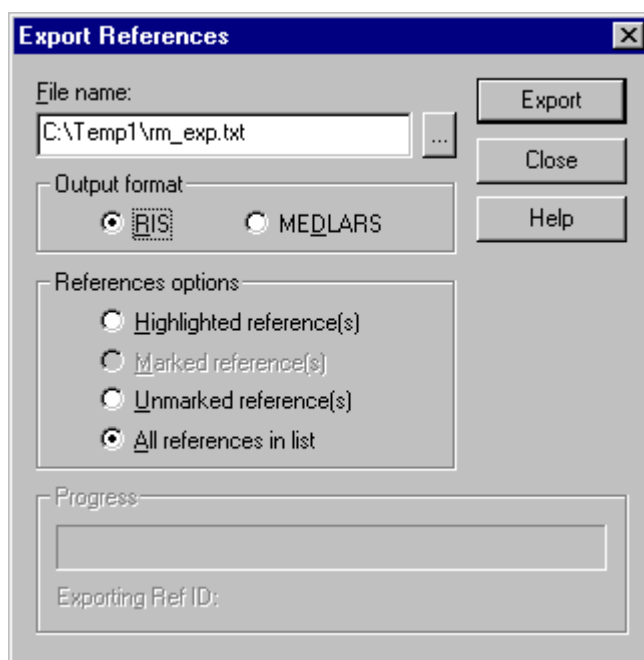
2. Click the "..." button, select the export folder, and enter a file name.

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. Select "RIS -- Reference Manager" as the "Import filter".

8. Click the "Start" button to import.

4.7.1.12 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".
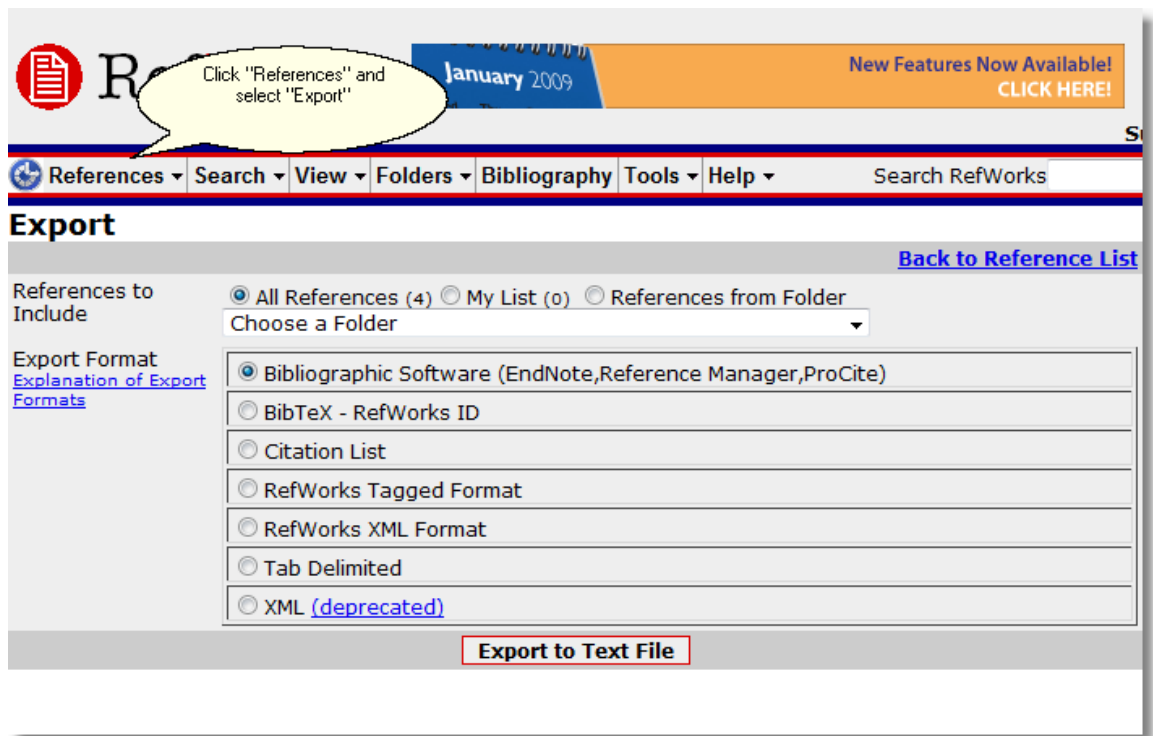
2. You can chose to export "All References", your current list "My List", or "References from a Folder".

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, click the "Import" button under the "References" Ribbon tab.

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.

4.7.1.13 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.
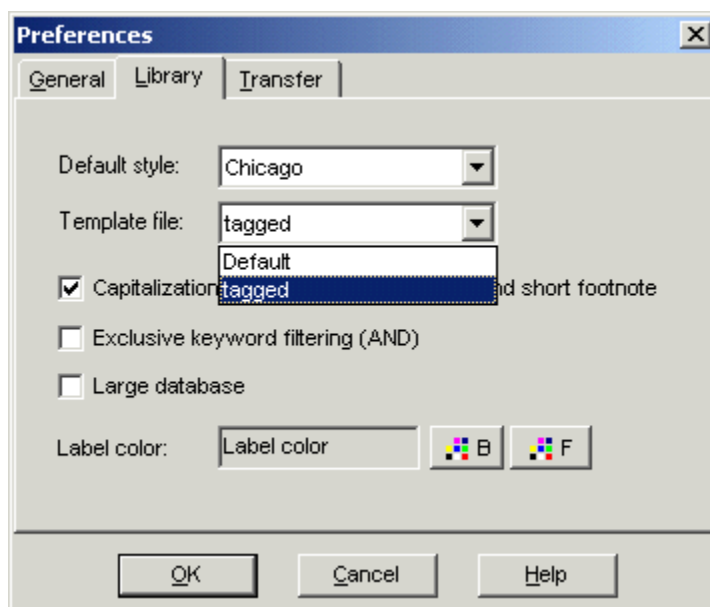
4. In Scholar's Aid, go to the menu command "File | Export to...". On the Export Window, go to the folder where you want to save the export file and enter a file name. Select "Plain text file formatted by a template (TXT)" as the "Save as type". Click the "Save" button.
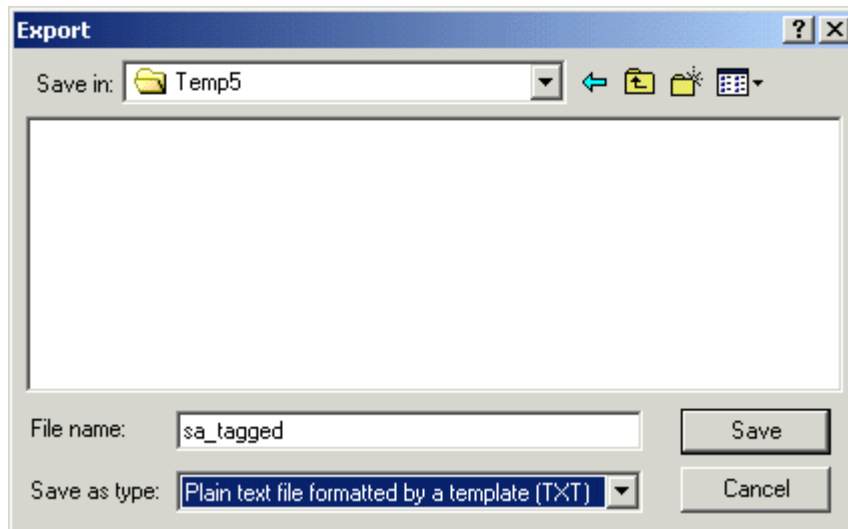
5. The Export window will be shown. Make sure "tagged output" is selected. Check "All records" in order to export all records in your database. Click "Export" to start exporting.
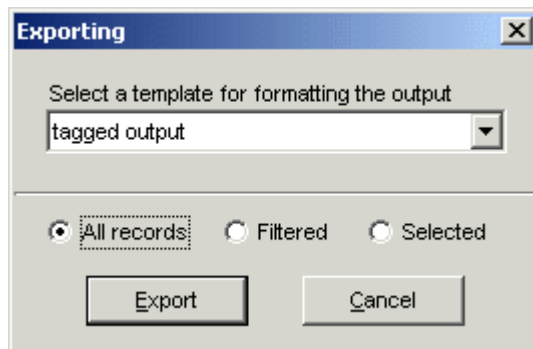
6. In Biblioscape, select the references folder where you want to import, and go to the menu command "File | Import...".

7. Click "Browse" to select the file you exported in step 5 as the "File to import". Select "Scholars Aid -- Tagged Output" as the import filter to use.

8. Click "Start" to import.

4.7.1.14 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...".

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, click the "Import" button under the "References" Ribbon tab.

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.

4.7.1.15 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.

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

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.
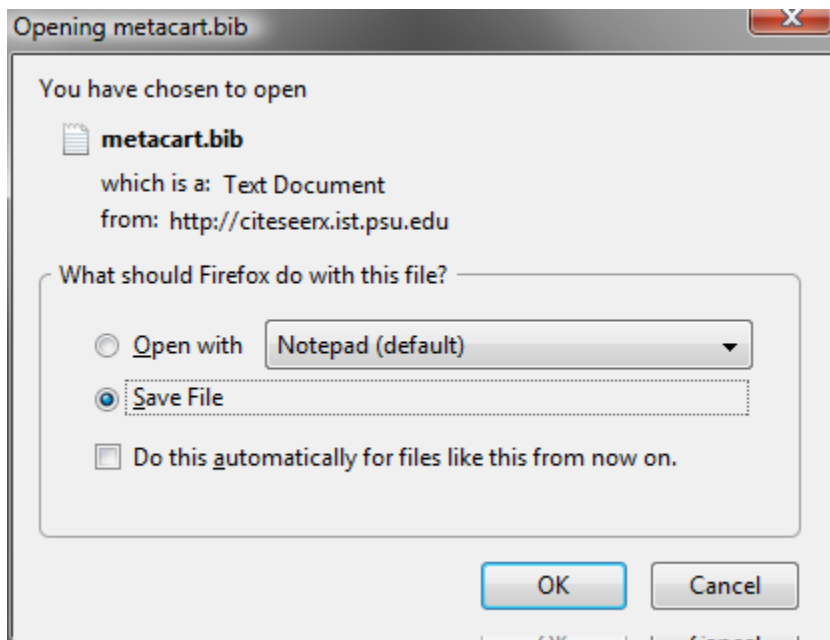
4. After the file is saved, Switch to Biblioscape and click the "Import" button under the "References" Ribbon tab. Select the file you just saved. Chose the import filter "BibTeX" and click the "Start" button to import.

4.7.2   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.
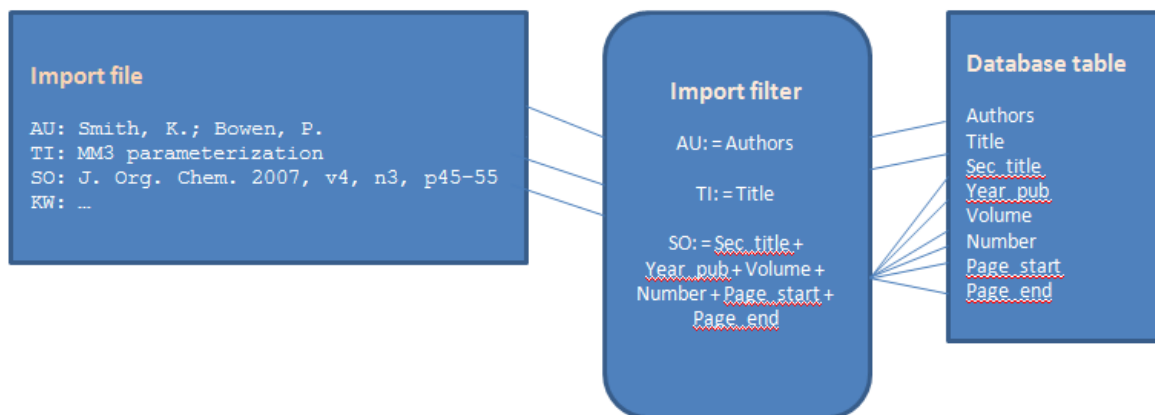
There are a few import filters for popular tagged formats like UNIX Refer, EndNote Refer, and RIS, but most import filters that come with Biblioscape are for tagged files from commercial database providers. Large information companies provide lots of databases for different disciplines. Each of these databases has its own way of using tags for its output file. The user, after completing a search, can save the results in an 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 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.

4.7.2.1   Manage import filters

Import filters are organized according to the data source. The table at the top 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 the web sites of the current import filter.

Search

You can search import filters by entering part of an import filter name, and pressing the Enter key.

Mark Favorites

Click the the Favorite cell of the selected record to mark it as Favorites. If the import filter is already marked Favorite, it will be unmarked. When you import records from a file, only favorite import filters will be listed in the selection list.

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.

Base On

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 "More Actions" button and select "Base On" 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 foe the "Comments" and "Example" fields. These two fields should be different for each import filter.

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.

4.7.2.2   Create an import filter
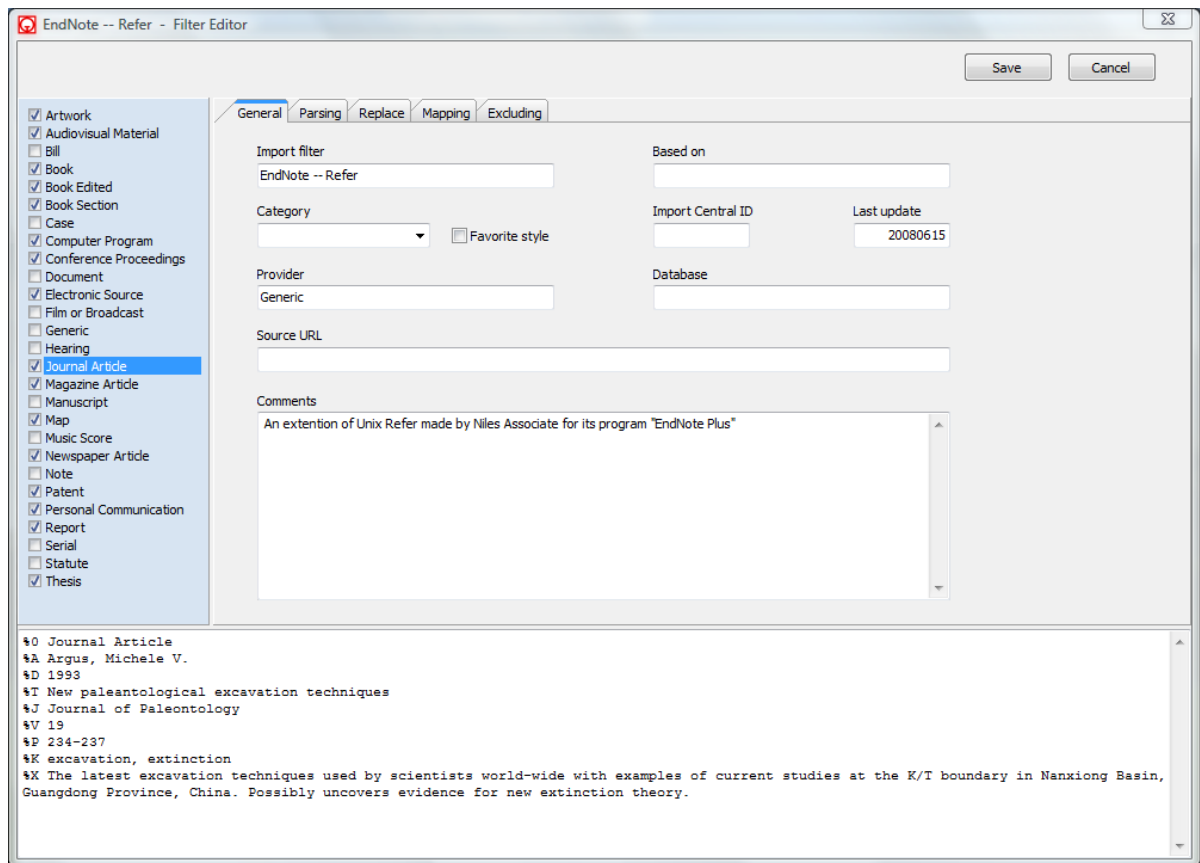
General

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.

- 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 "Base On" 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.

Parsing

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.

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.

Authors

- 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.

- 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.

Date

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".

Keywords

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; ...

Identifiers for multiple filters

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".
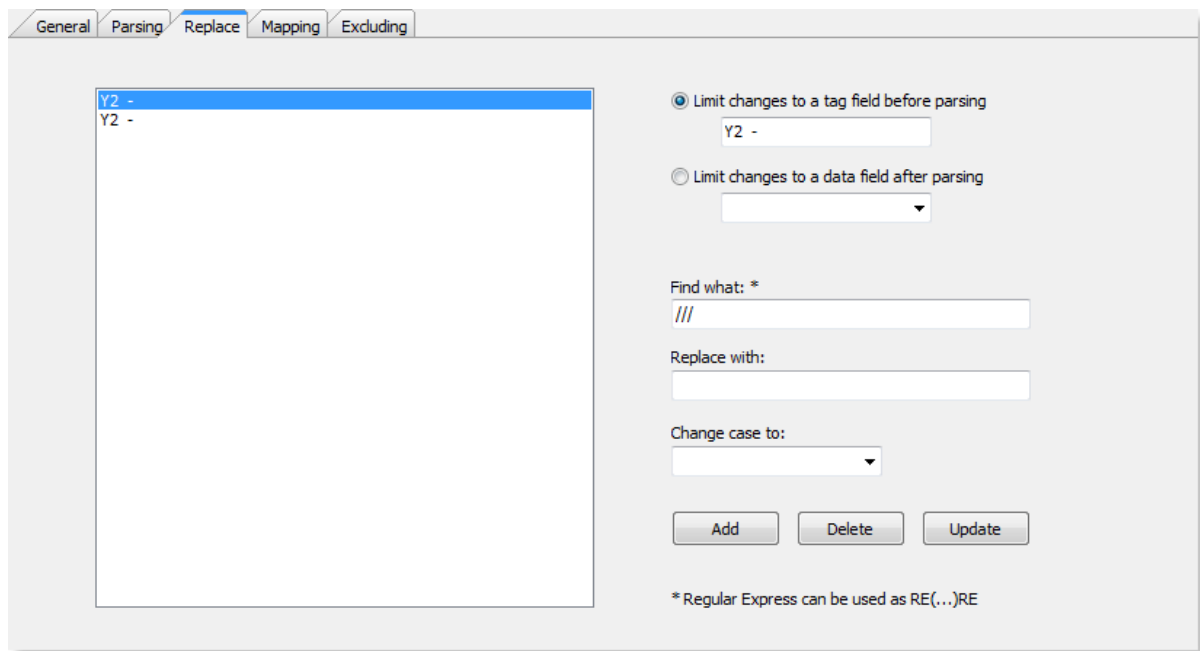
Replace

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 seemly 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.

4.7.2.3   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.
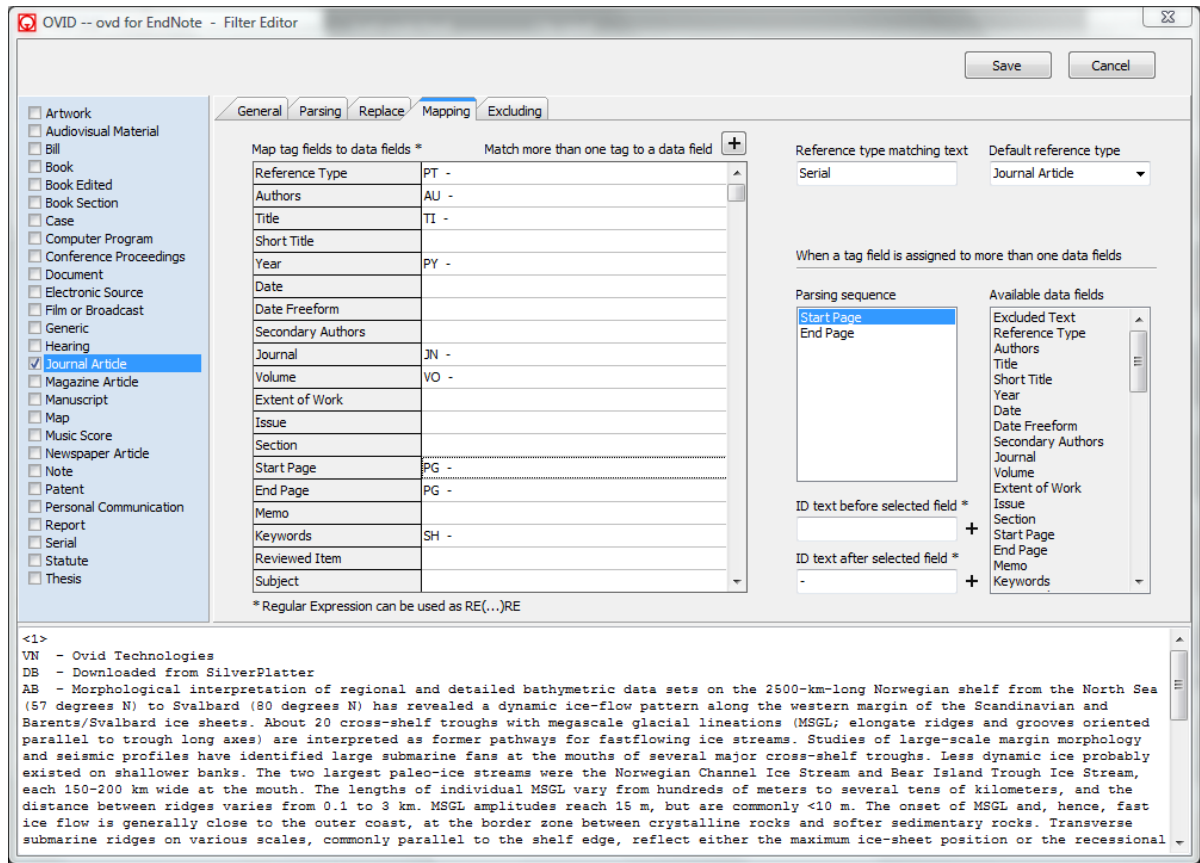
New

To create a new reference type specific sub-filter, click the check box before the reference type. 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 inherence 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

After selecting a reference type from the left pane, you can change the properties. All the changes will be saved when you switch to another reference type or after you click the "Save" button.

Delete

Click an already checked box before a reference type will delete the sub-filter.

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.

Mapping

Now we will cover the sub-filter "Mapping" tab. This tab 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 "Reference type matching text" label is used by Biblioscape to decide which sub-filter is to be used. On the "Mapping" 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 example, if Biblioscape found the text "Journal-Article" after the tag "DT:", 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.
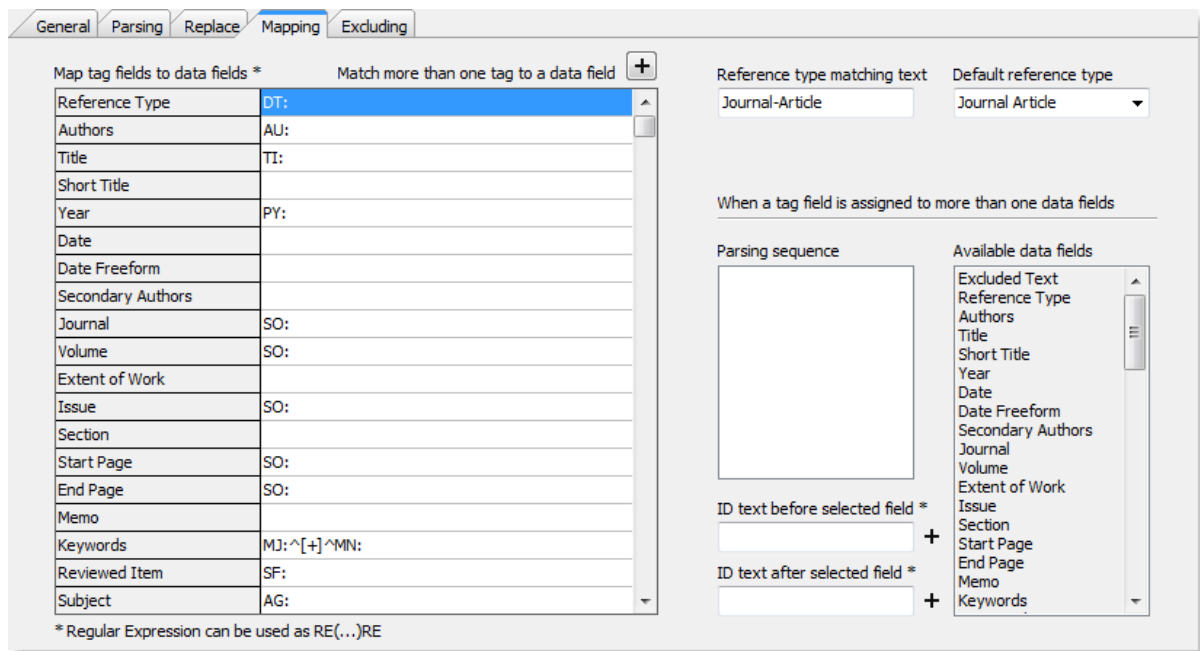
There are two columns in the fields matching list. The first one is the reference type field label. The second one is the field tag found in the import file. In the above example, the field tag "TI:" is mapped to the database field "Title". If Biblioscape found tag "TI:" in the import file, it will put all the text after the tag "TI:" into the database "Title" 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 more than one tag to a data field". 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 may 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
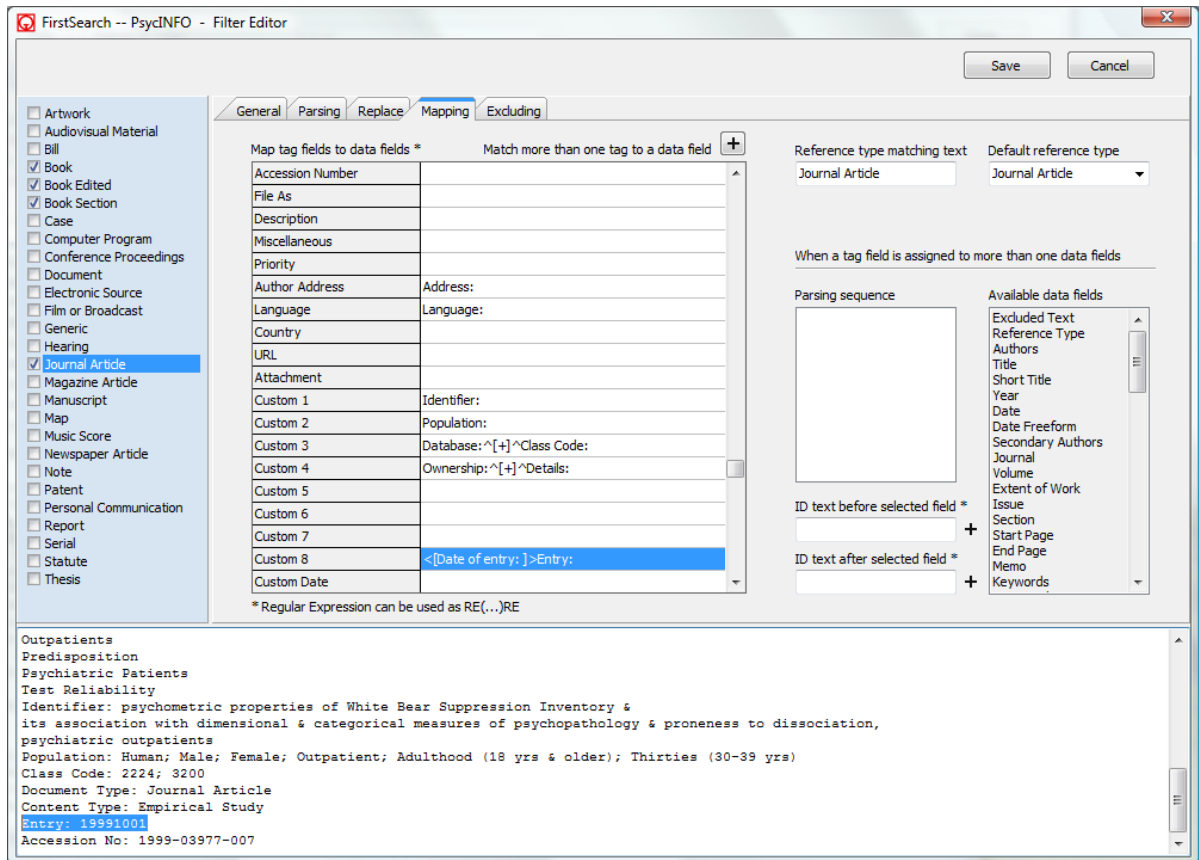
Some tag fields do not have corresponding database fields in Biblioscape. You may have to map them to one of the custom fields in the Biblioscape database, or to the Miscellaneous field which can take almost unlimited amounts of data. In such cases, you may want to insert some text before or after the 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

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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.
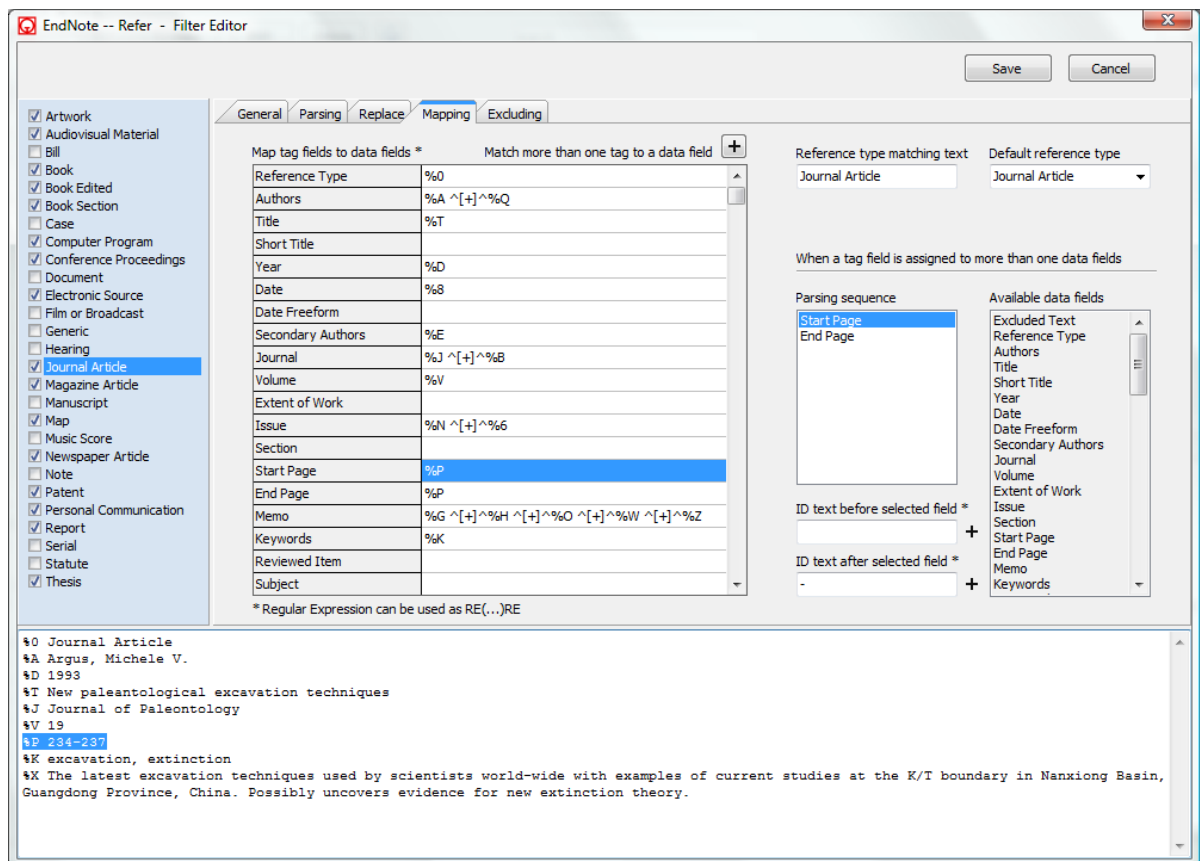
Special ID text

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" after clicking the "+" button. The text "^[month]^" will be inserted

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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, ...".

Excluding

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 Biblioscape sees these tags, they will be removed. If they are not included in the "Exclude Fields" list, Biblioscape will treat it as part of the previous tag field.
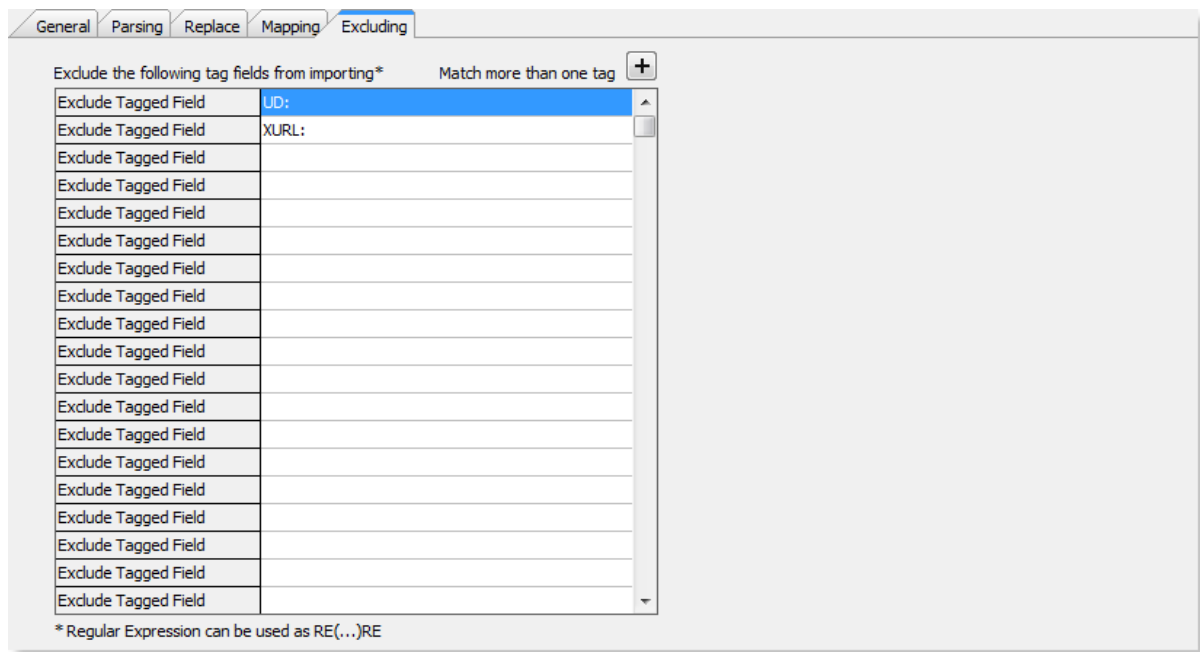
Regular expression

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.

4.7.2.4   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.

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 matchs string 'foobar'
\^FooBarPtr matchs '^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 matchs 'foo bar' (note space in the middle)
\tfoobar matchs '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] matchs 'a', 'z' and '-'
[az-] matchs 'a', 'z' and '-'
[a\-z] matchs 'a', 'z' and '-'
[a-z] matchs all twenty six small characters from 'a' to 'z'
[\n-\x0D] matchs any of #10,#11,#12,#13.
[\d-t] matchs any digit, '-' or 't'.
[]-a] matchs 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 matchs string 'foobar' only if it's at the beginning of line
foobar$ matchs string 'foobar' only if it's at the end of line
^foobar$ matchs string 'foobar' only if it's the only string in line
foob.r matchs 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 agains 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 matchs 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 occurences 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', 'foobalkjdflkj9r' and 'foobr'

foob.+r matchs strings like 'foobar', 'foobalkjdflkj9r' 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) matchs strings 'foobar' or 'foofoo'.

Metacharacters - subexpressions

The bracketing construct (...) may also be used for 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} matchs strings which contain 8, 9 or 10 instances of the 'foobar'
foob([0-9]|a+)r matchs '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+ matchs 'aaaa' and 'cc'.
(.+)\1+ also match 'abab' and '123123'
(['"]?)(\d+)\1 matchs '"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 matchs 'Saint-petersburg' and 'Saint-Petersburg'
(?i)Saint-(?-i)Petersburg matchs 'Saint-Petersburg' but not 'Saint-petersburg'
(?i)(Saint-)?Petersburg matchs 'Saint-petersburg' and 'saint-petersburg'
((?i)Saint-)?Petersburg matchs '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.

4.7.3   Exporting references

You may need to share bibliographic data with other users who don't use Biblioscape, or you may want to switch from Biblioscape to another software that can serve your needs better. Biblioscape provides easy ways for users to export data in many formats.

- For exporting to other bibliographic software, Biblioscape 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

4.7.3.1   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:
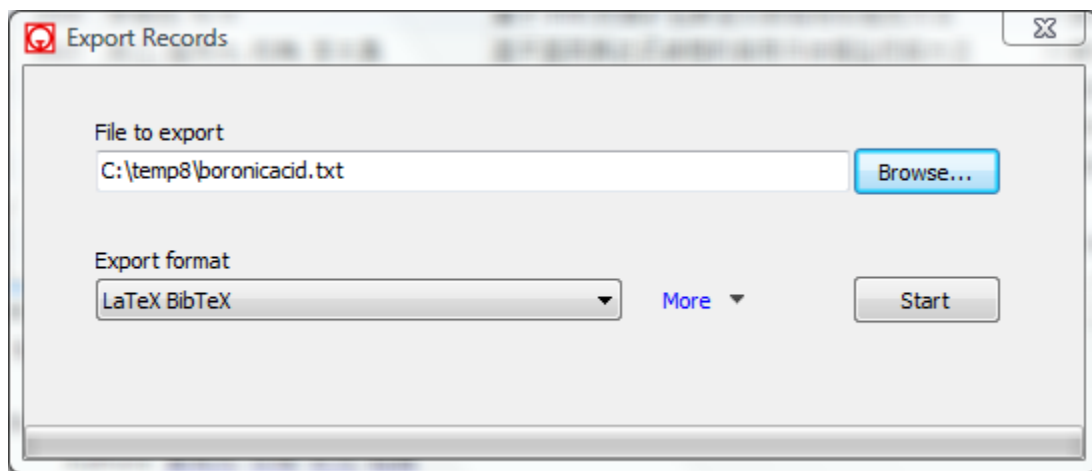
1. Select the records you want to export.

2. Click the "Export" button under the "References" Ribbon tab "Actions" group.

3. Select "BibTeX -- LaTeX" as the export format.

4. Click the "Browse" button to select the folder you want to export to and give it a file name.

5. Click the "Start" button to export.

See also: Using Biblioscape with LaTeX editors.

4.7.3.2   Export references as RTF or HTML file

Biblioscape comes with 1,000 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 can save it in RTF format, HTML format, etc. 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.

1. Select the references you want to export.

2. Click the "Bibliography" button under the "References" Ribbon tab "Bibliography" group.

3. Select the output style you want.

4. Click the right mouse button and select "Save As".

5. Select an export folder and give a file name.
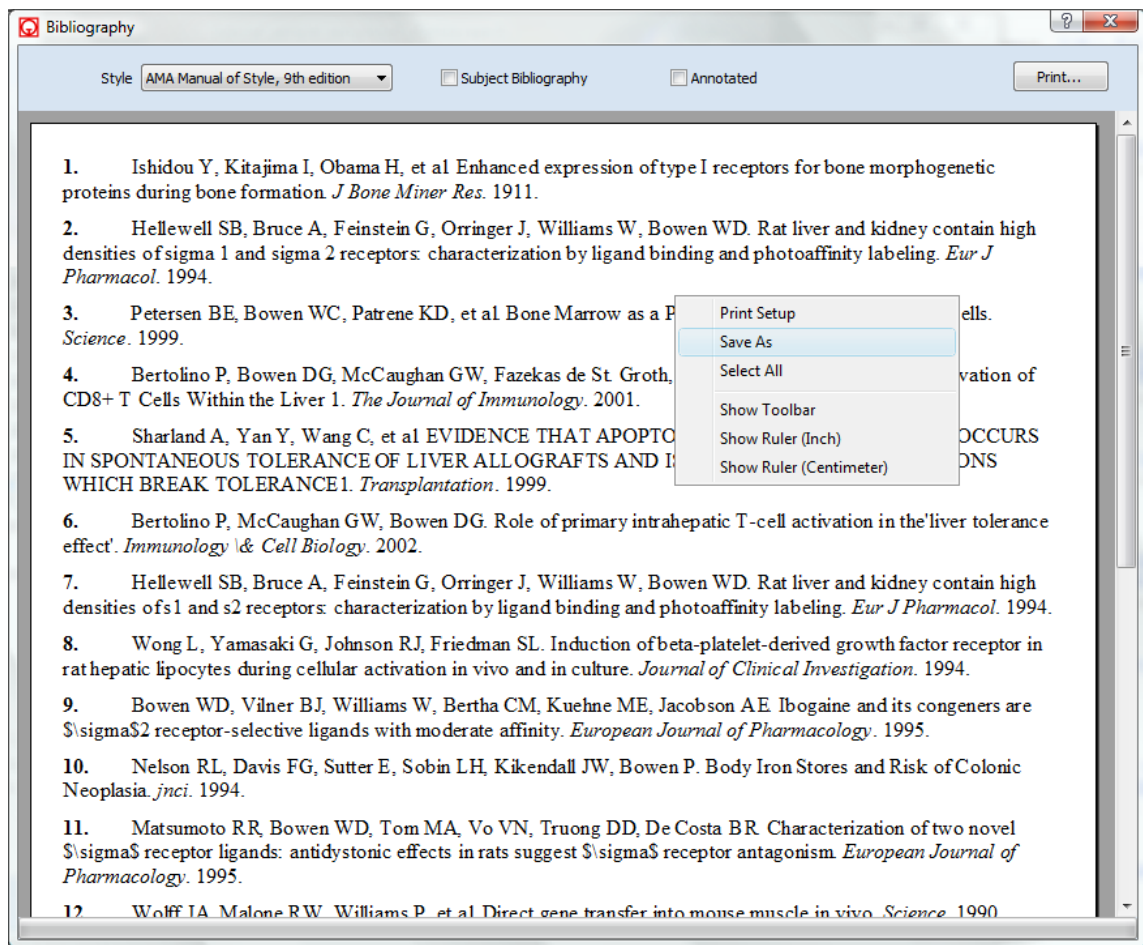
4.7.3.3   Export references to a delimited file, a spreadsheet, or a database table

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, press Ctrl+Alt+A to retrieve all references. You can also open a collection, smart collection, or run a search. All the references in your current list will be exported.

2. Click "Export" button under the "References" Ribbon tab.
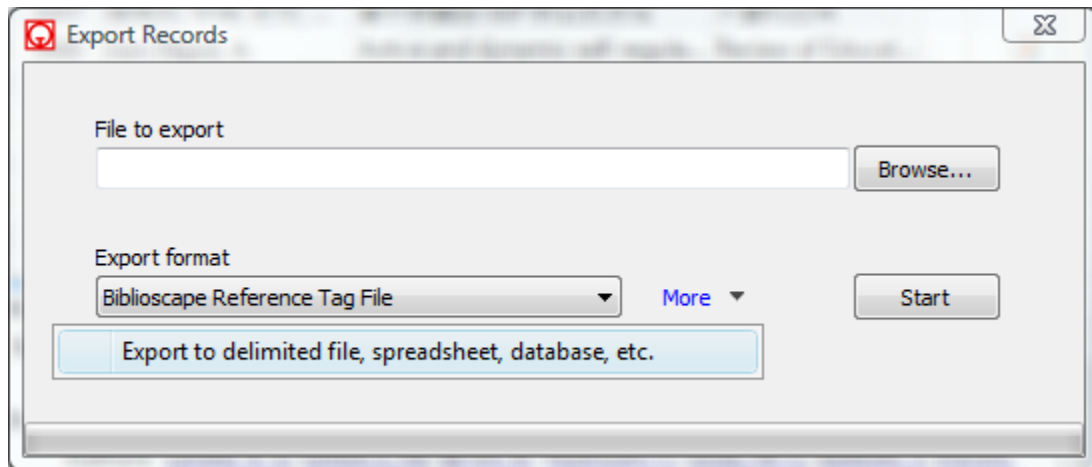
3. Click the "More" button and select "Export to delimited file, spreadsheet, database, etc."

4. Select the desired format to export and click the "Next" button to go through the wizard step
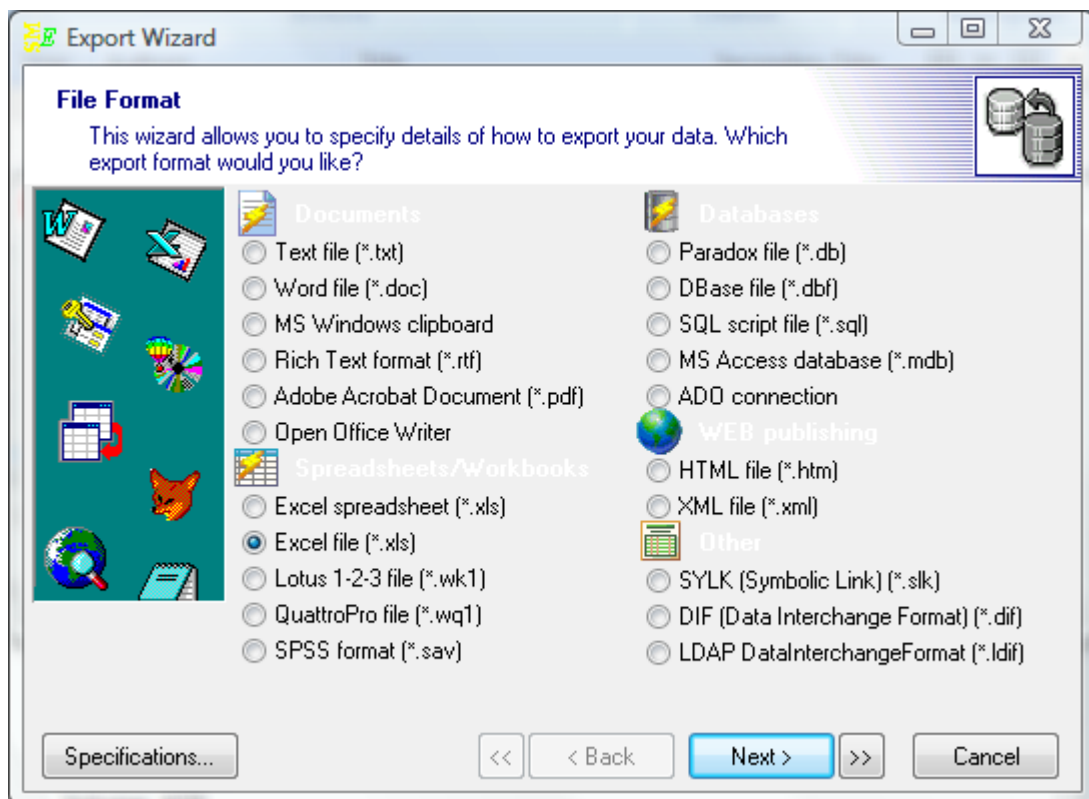
4.7.3.4   Export references to other software programs

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 press Ctrl+Alt+A to retrieve all references. You can also run a search and export the hits only.

2. Click the "Export" button under the "References" Ribbon tab.
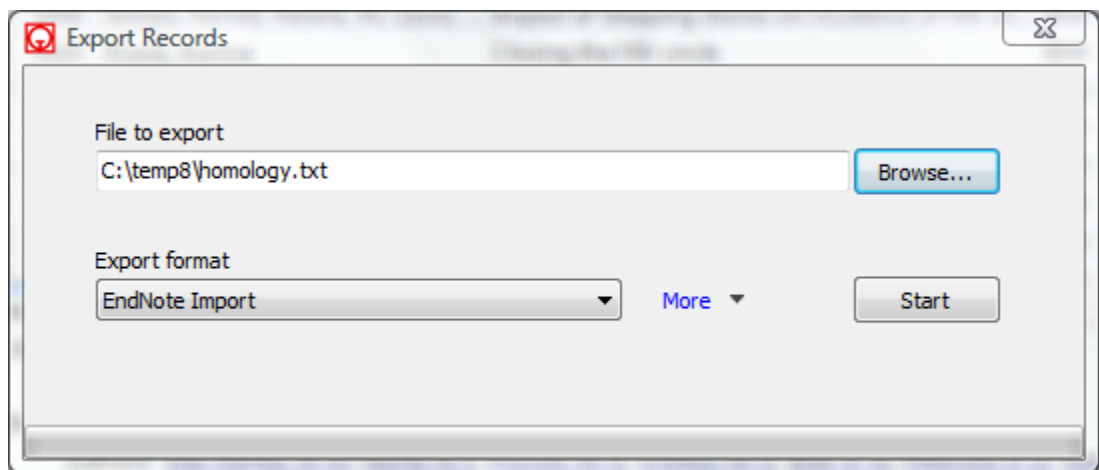
3. Select "EndNote Import" as the export type.

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 press Ctrl+Alt+A to retrieve all references. You can also run a search and export the hits only.

2. Click the "Export" button under the "References" Ribbon tab.

3. In the Export window, Select "Reference Manager RIS" 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.

4.7.4   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, press Ctrl+Alt+A to retrieve all references.

2. Click the "Export" button under the "References" Ribbon tab.

3. Click the "Browse" button and select the folder where you want to store the export file and type a file name.
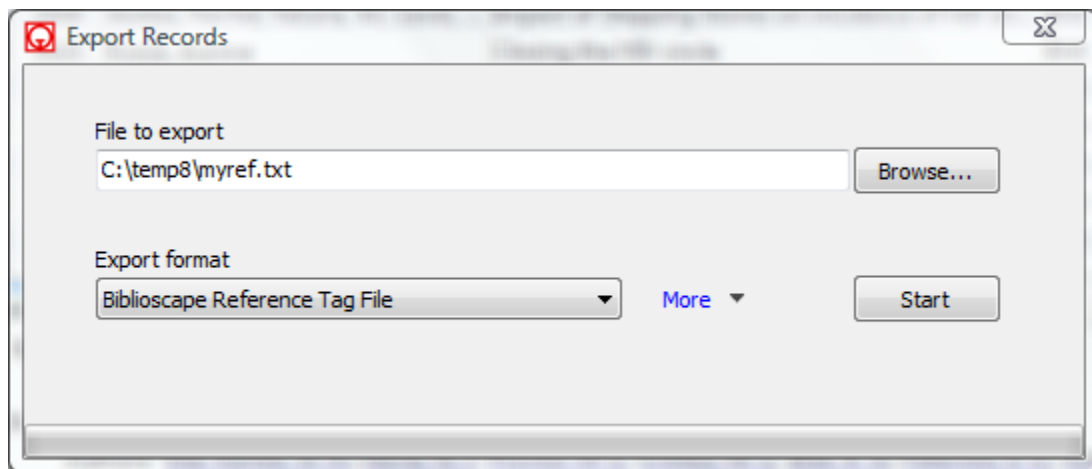
4. Make sure "Biblioscape Tag File" is selected as the export format. Click the Start button to export.

5. Open the second database. Click the "Import" button under the "References" Ribbon tab.
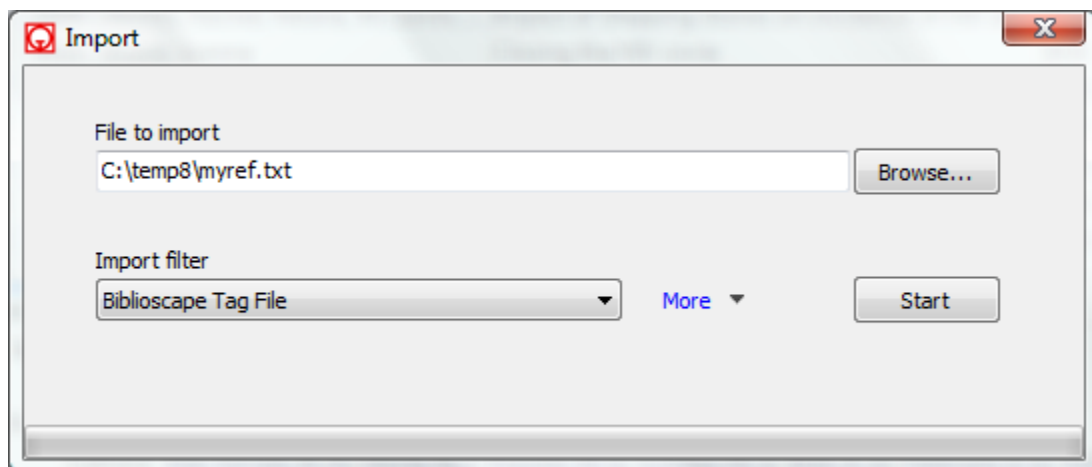
6. Click the "Browse…" button to select the file you just exported.

7. Make sure "Biblioscape Tag File" is selected 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.

4.7.4.1   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 proteinisoform 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 aliphaticgroup 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

4.8   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 re-organize 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.

4.8.1   Insert symbols

To insert symbols, put the cursor where a symbol needs to be inserted. Click Window's Start button and enter "charmap". Select the program "charmap.exe" to launch it.
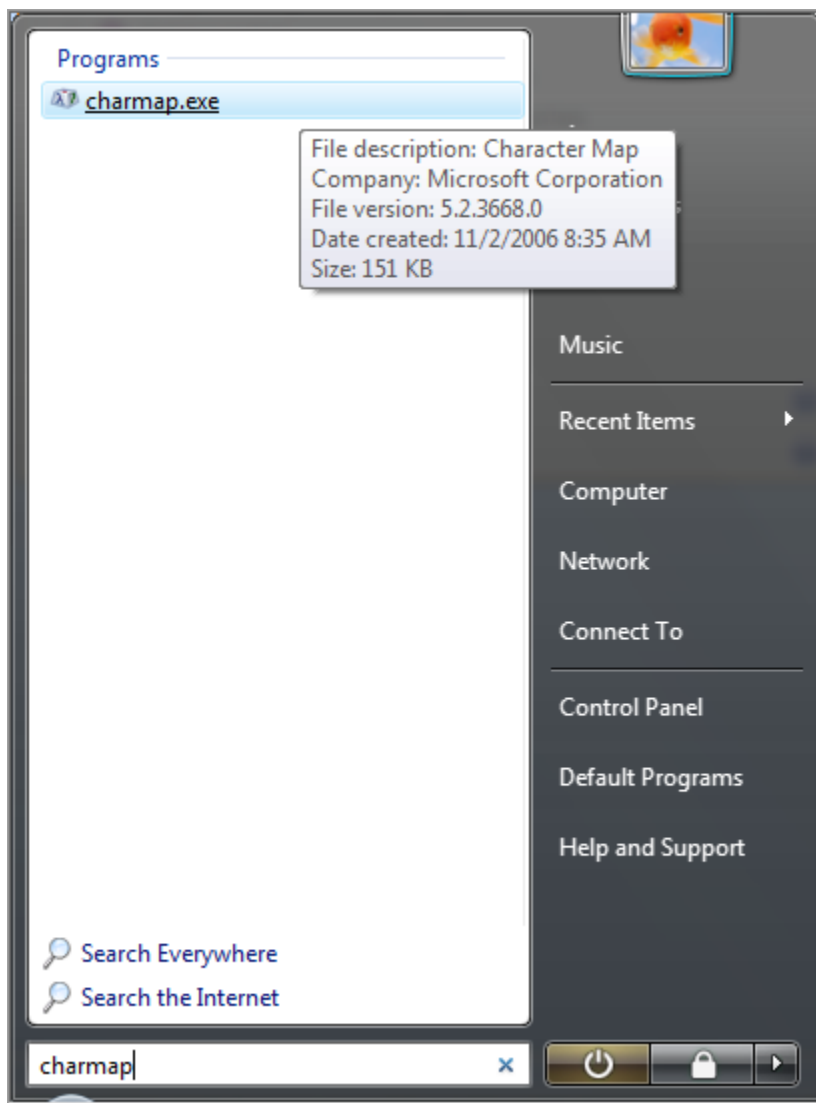
Make sure the font selected matches the font used in Biblioscape which is "Segoe UI" by default. Select the symbol you want to insert, click "Select" and "Copy".
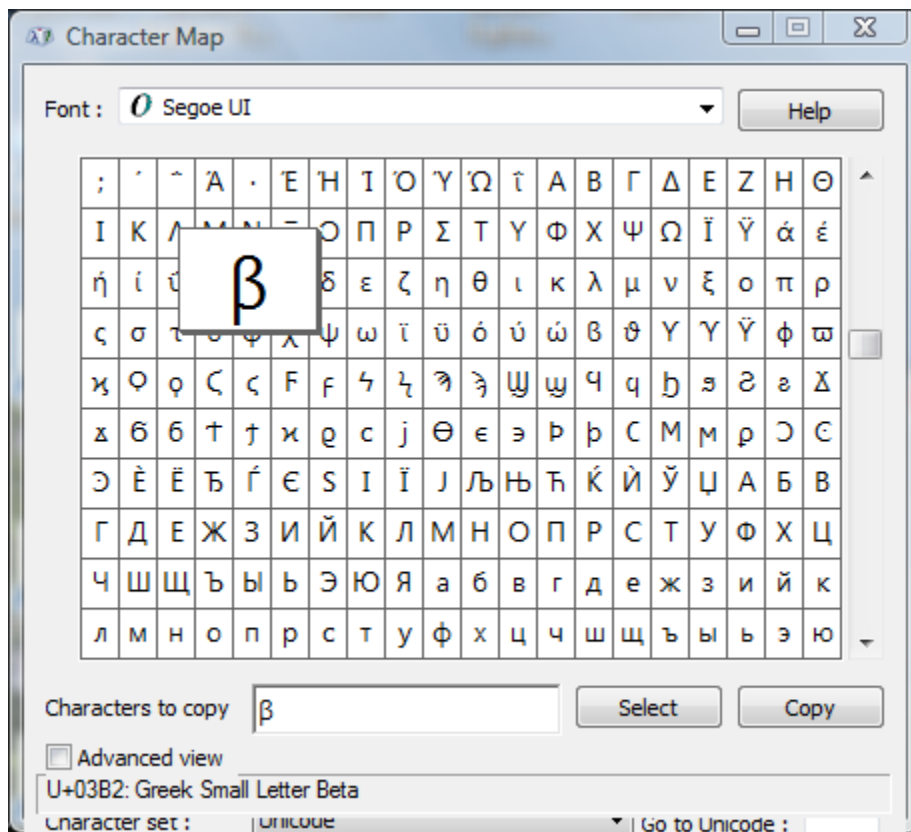
Go back to Biblioscape and press the Ctrl+V keys to paste it.

4.8.2   Eliminate duplicates
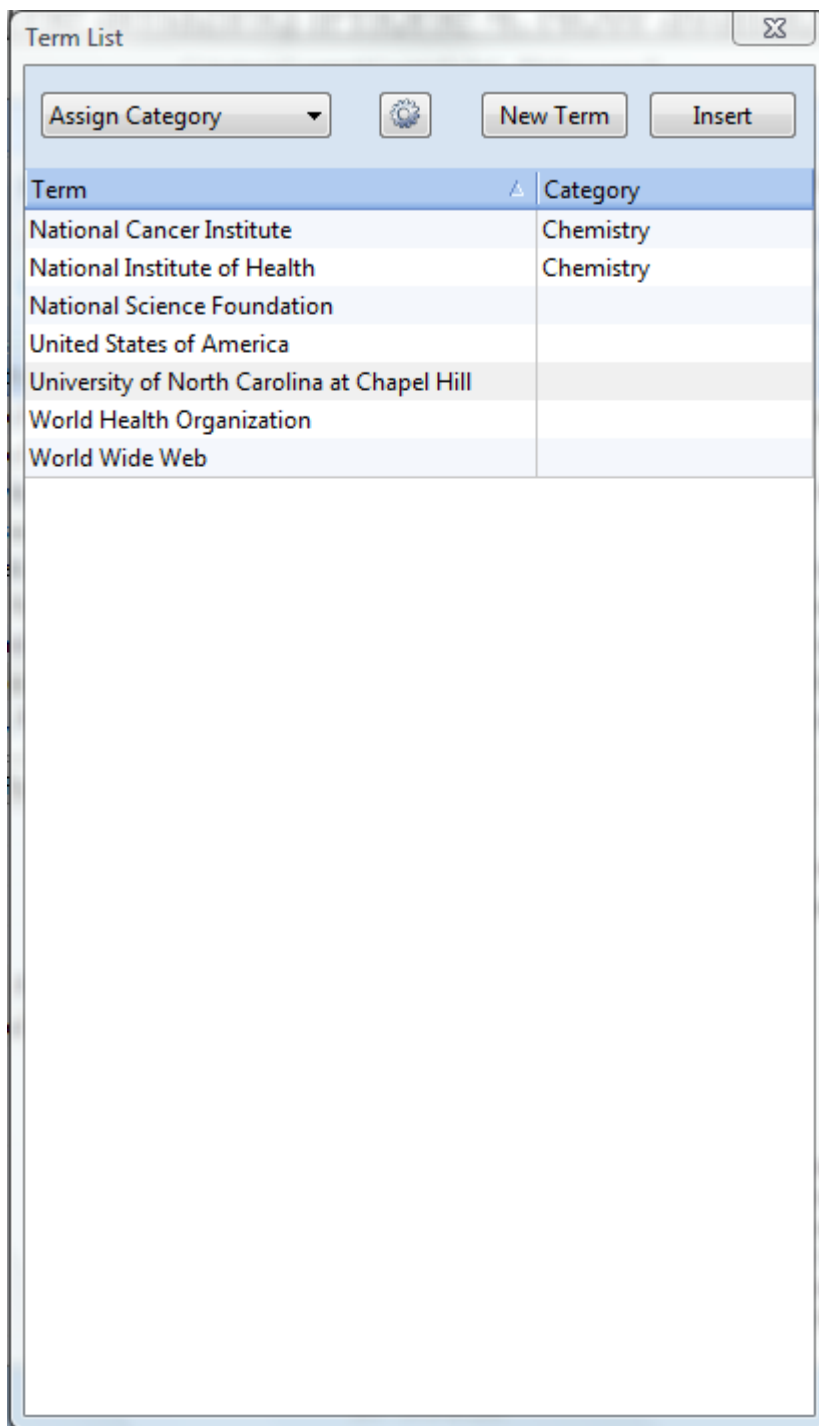
It is possible the same record was entered twice in your database. You can remove duplicate records by clicking the "Utility" button under the "References" Ribbon tab and select "Eliminate Duplicates". "Eliminate Duplicates" only removes duplicate records in the current references list. If you want to remove all duplicates in your database, you should first press Ctrl+Alt+A to retrieve all references. When you browse each duplicate pair, both records will be displayed at the bottom. You can move data between the two records. Click the "Delete" button to delete the record you don't want to keep.
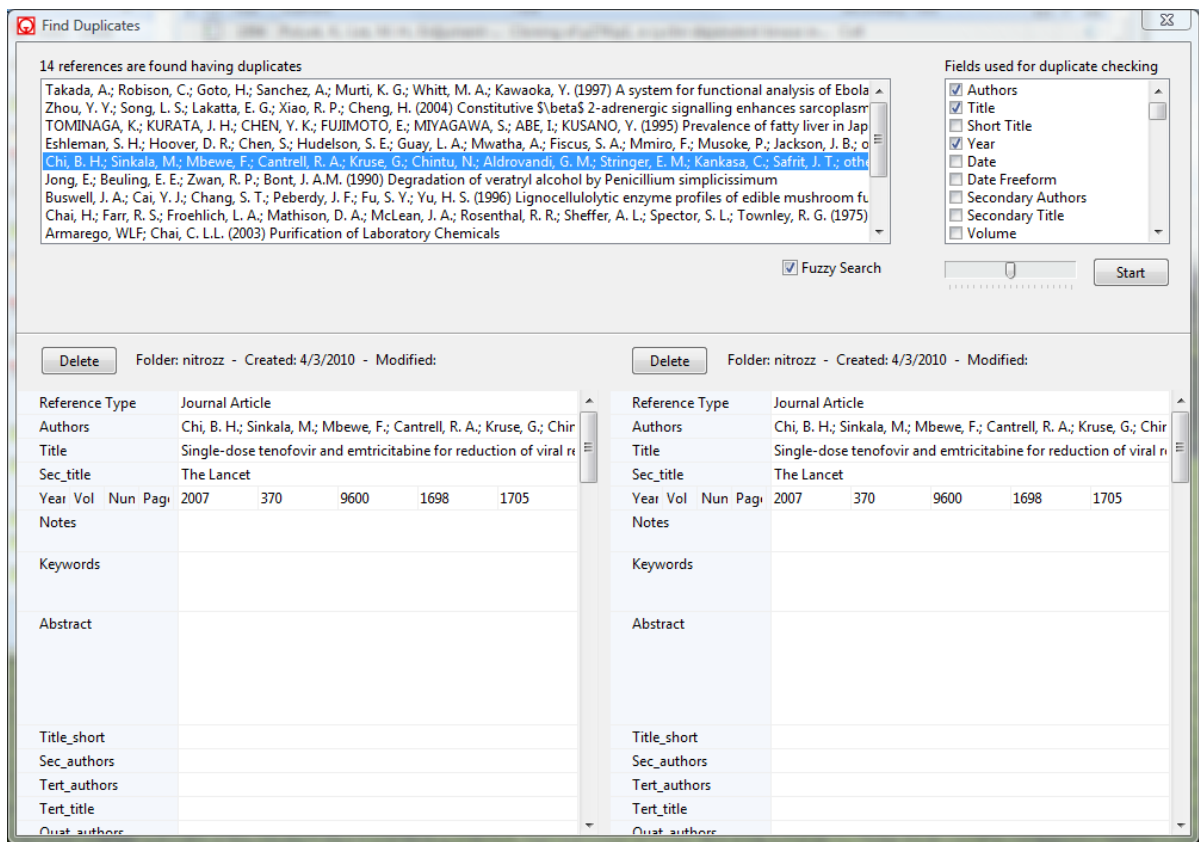
Eliminate duplicates using fuzzy comparison

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. The fuzzy search is turned off by default.

4.8.3   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 the "Term List" button under the "References" Ribbon tab. Each term can be assigned a Category. To add a new category, click on the "Actions" button and select "New Category". Click on the "New Term" button to insert a new term. Click the "Actions" button and select "Delete Terms" 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 an spreadsheet program like Excel according to the format found in a sample export file. Then save the sheet as a tab delimited file. To import this file, click the "Actions" button and select "Import Terms". Biblioscape also allows users to import a simple word list in a plain text file. Each line can contain a word or phrase.

4.8.4   Global edit
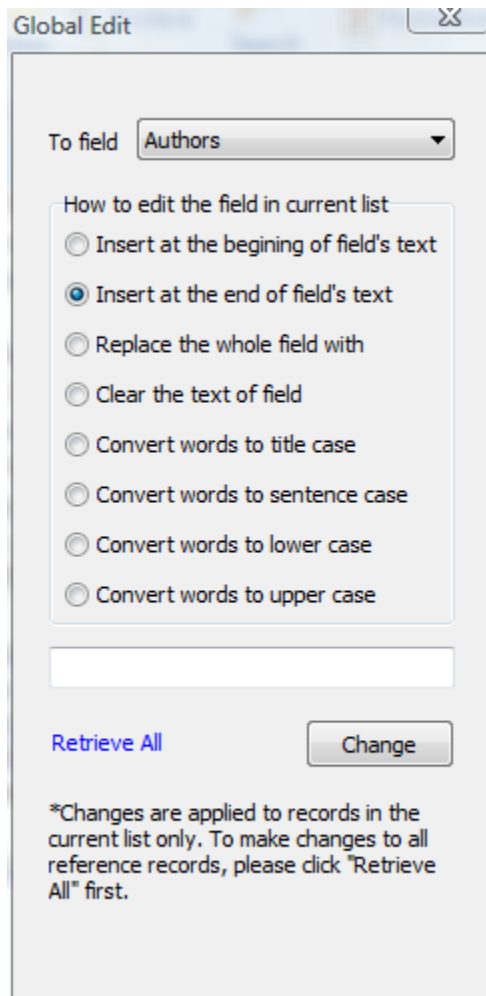
Sometimes you may want to make changes to more than one record at once. In that case, "Global Edit" is the tool to use. Global edit will operate on your current reference list. If you want the changes to be applied to all the references in your database, press Ctrl+Alt+A to retrieve all references. To use global edit, click on the "Utility" button under the "References" Ribbon tab and select "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:\biblioscape x\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.

4.8.5   Move or copy field
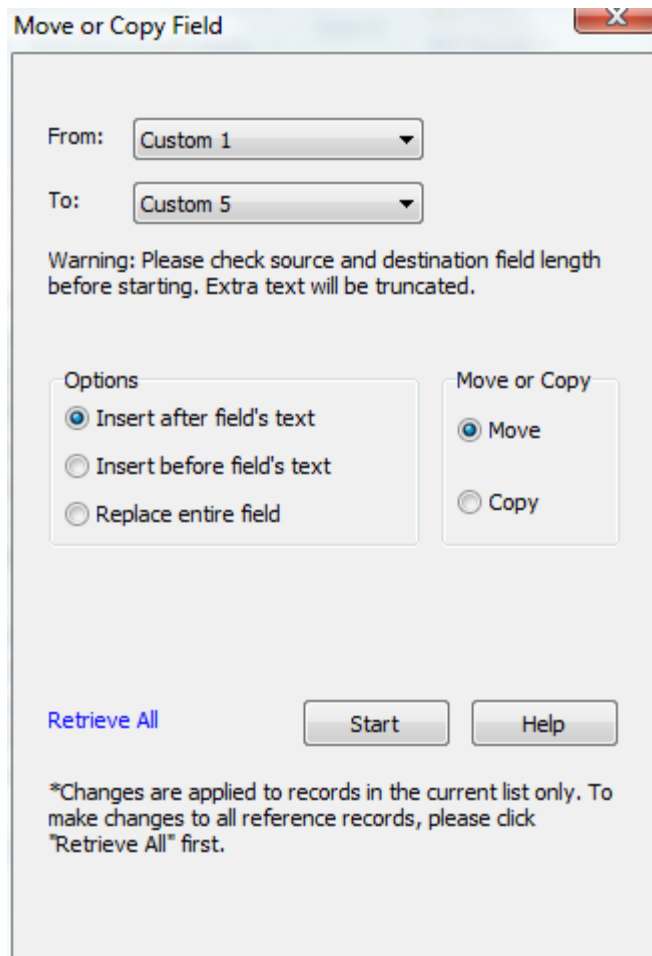
You can move or copy the entire contents of one field to another one. This operation will be applied to all references in the current reference list. If you want to apply this operation to all the references in your database, press Ctrl+Alt+A to retrieve all references first. To move or copy field content, click the "Utility" button under the "References" Ribbon tab "Actions" group and select "Move 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 "...\Biblioscape x\Tools\edbmgr.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.

4.8.6   Find and replace

Biblioscape 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.
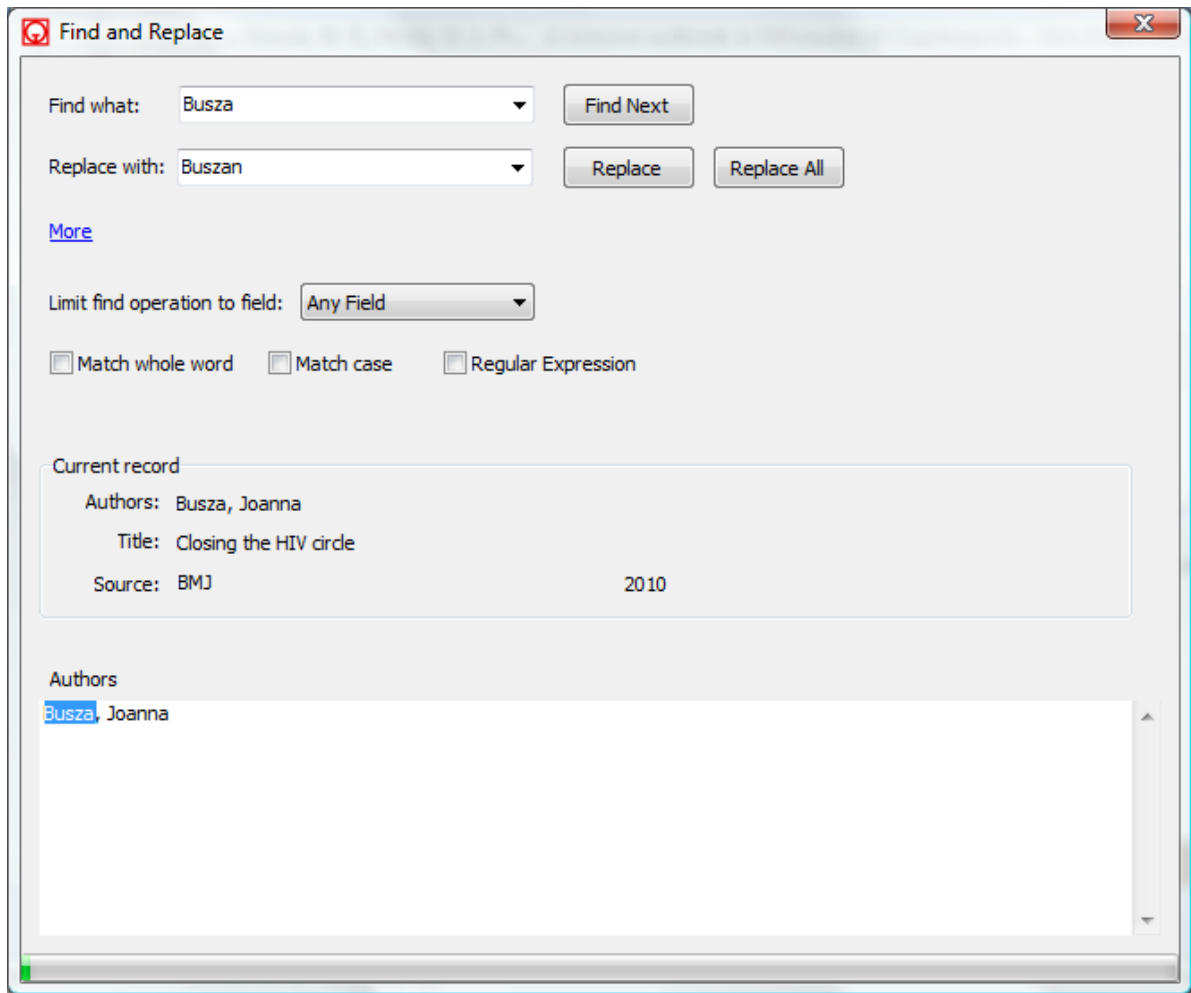
Find a word or phrase

1. Click the "Replace" button under the "References" Ribbon tab "Actions" group.

2. Next to "Find what:", 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 the "Replace" button under the "References" Ribbon tab "Actions" group.

2. Type the word you want to find after "Find what:", and the word to replace it with after "Replace 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 wether to match the whole word or part of the word.

4.8.7   Printing bibliography

The Print command in Biblioscape will print what's shown in the "Read Only" tab. If you want to print references in a selected style, you have to click the "Bibliography" button under the "References" Ribbon tab "Bibliography" group. You can select a style from the list of favorite styles. If the style you want is not listed there, close the Bibliography window. Click the "Styles" button on the "References" Ribbon tab "Bibliography" group and mark the desired style as Favorite. You can also create a new style if none of the existing ones fit your needs. This makes it a very flexible way to print records from your references collection. Biblioscape also provides an easy way to generate subject bibliography. You can chose any field as the subject field.

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 "Bibliography" button under the "References" Ribbon tab "Bibliography" group. 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.
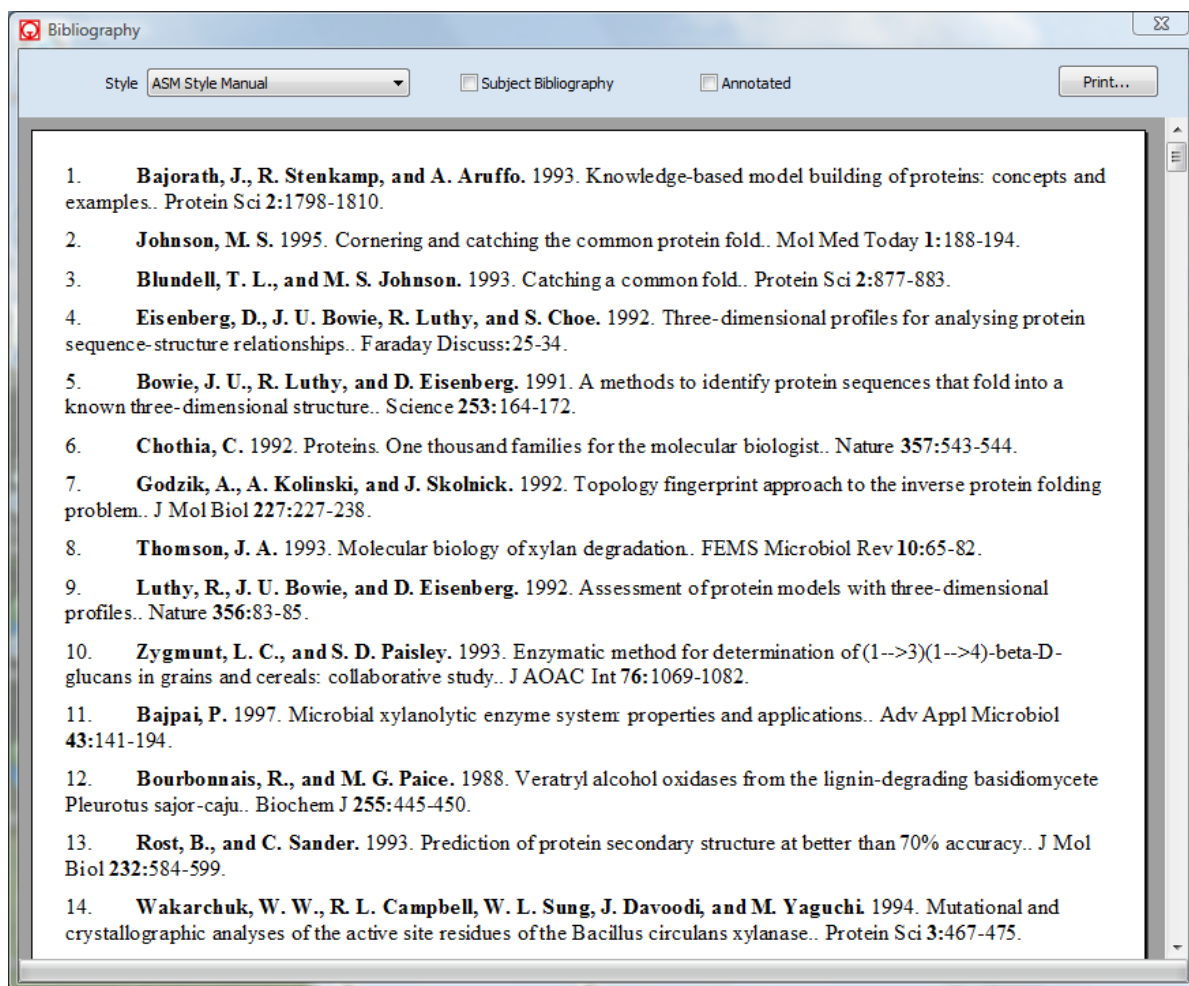
The format of your references is controlled by the output style you pick. By default, Biblioscape uses the output style selected in the style box under the "References" Ribbon tab "Bibliography" group. If you want to use another style, pick one from the style list. The formatted references list will be regenerated to reflect the change. You can choose to save the formatted references as a file by clicking the right mouse button and select "Save As". You can open this file later in a word processor. To change the paper size, source, and orientation, click the right mouse button and select "Print Setup".

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 click the "Bibliography" button again. Biblioscape also supports sorting references by more than one field. For example, you can sort references first by Authors and then by Year by click the "Authors" column header first, hold down the Shift key and click the "Year" column header. Then click the "Bibliography" button.

Print a subject bibliography

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. Click the "Bibliography" button under the "References" Ribbon tab "Bibliography" group.

3. Check the box "Subject bibliography" at the top.
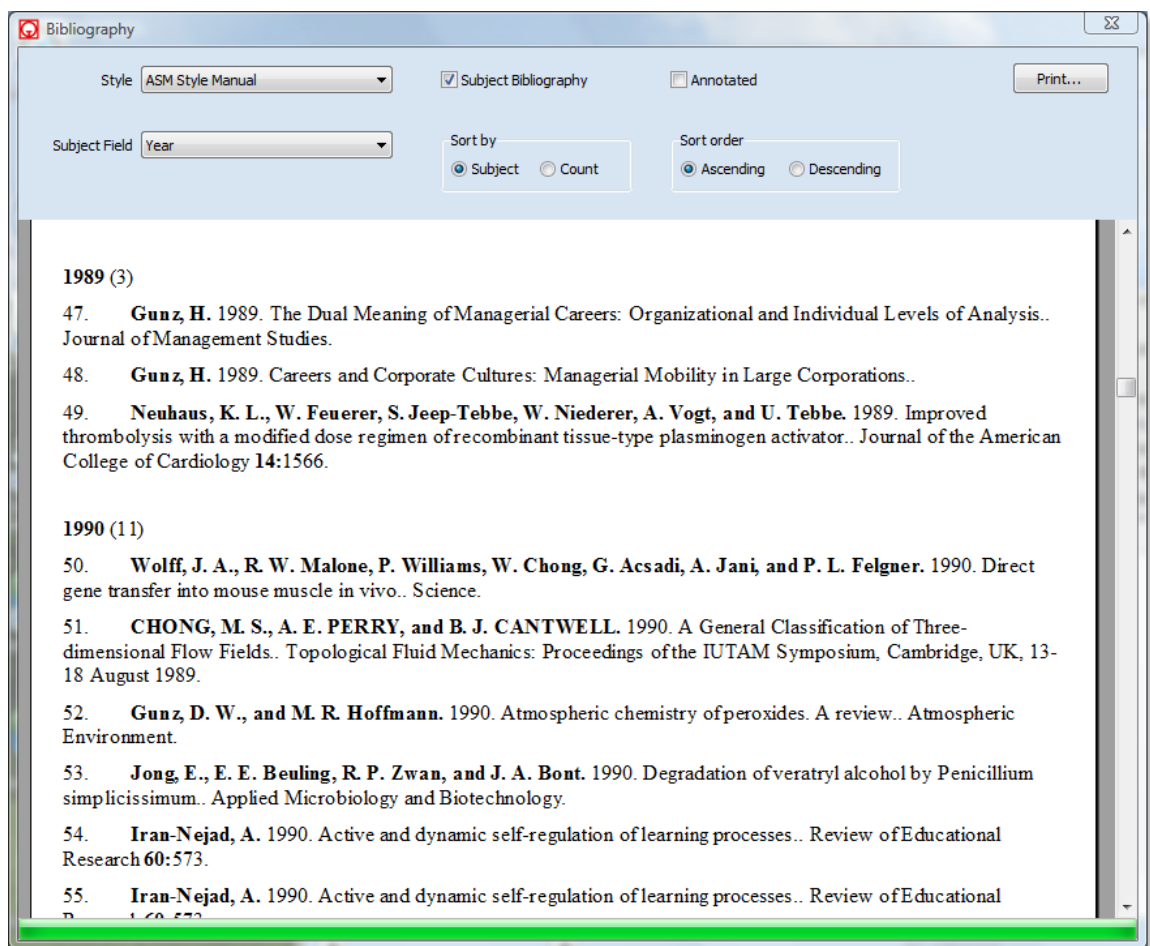
4. Under the subject bibliography section, select the field to be used as the subject heading. Select the sort field for the subject list. Next, select the sorting order for the subject headings. The headings can be sorted in ascending or descending order. The sorting order for the references under each 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 "Style" combo box at the top.

5. To print the subject bibliography, click the "Print" button. To save the subject bibliography as a RTF file, click the right mouse button and select "Save As".

Taking notes

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

Part

V
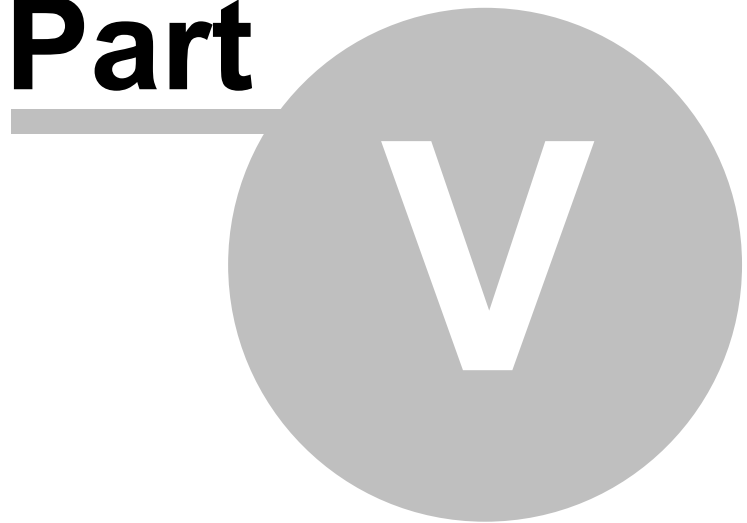
5   Taking notes

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 Biblioscape 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. 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 creation 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, select the text of interest. Then click the "Notes" drop down arrow and select the type of note you want to write. Enter the text of your annotation and click the "Save" button. The note will be saved to the last notes folder you opened in the same session. If you have not opened any notes folder in the session. It will be saved to the first notes folder in your database. The first sentence will be used as note's title. You can paste graphics in the note field or paste copied content from a web browser. If you need to change text formatting, click the "Toolbar" hyperlink.
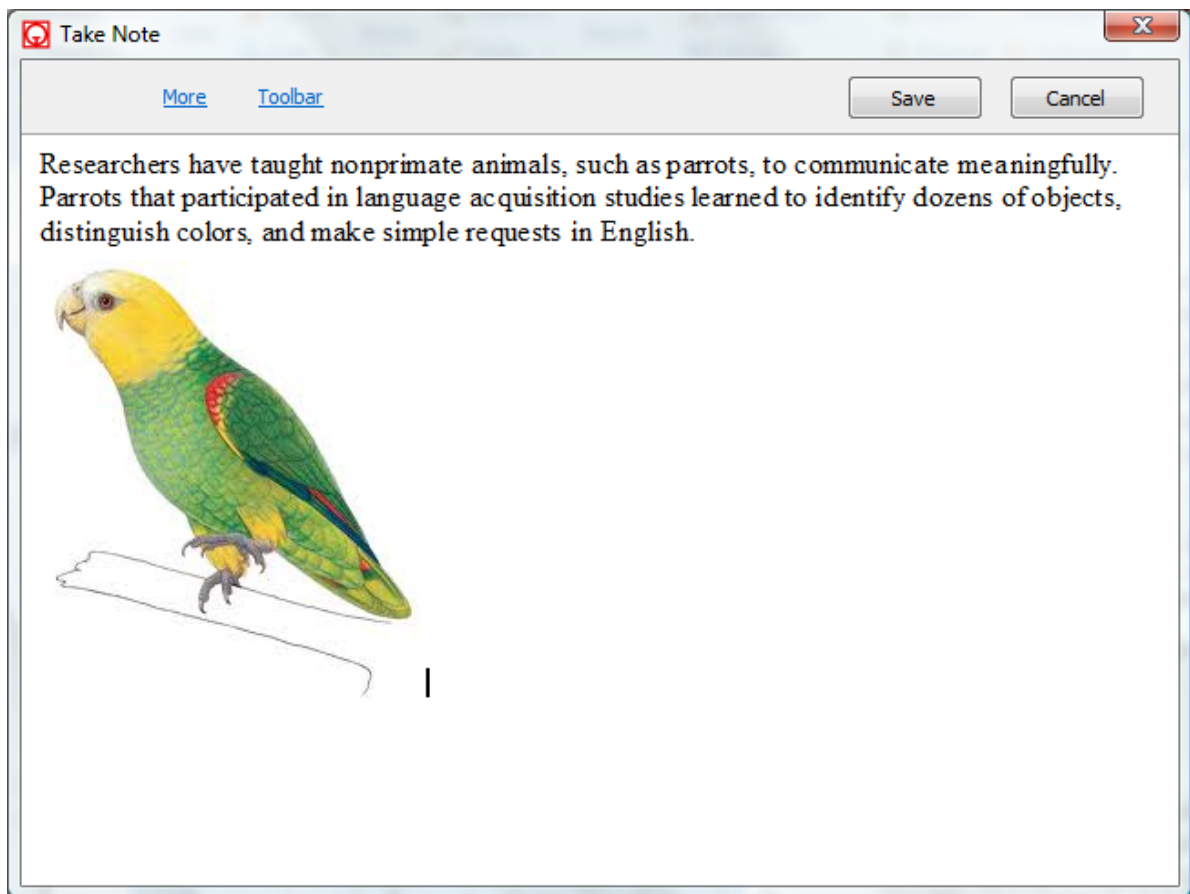
If you want to enter a title other than the first sentence of the note, click the "More" hyperlink. First change the title to what you want. You can also change the note type. Note type is important because it will tell you if the note is a direct quote, a paraphrased quote, a summary, or if it is your 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 chose "Contradicts". There are other options. You can also edit the list by editing the file "...\Biblioscape x\Global\link_relationship.txt". If you were in the PDF tab before taking a note, Biblioscape will add the page number automatically. Otherwise you can the page number manually. Writing quality notes is essential, and retrieving your notes is also important, so you should categorize your notes. You can select a category from the drop down list. You can also categorize your annotation notes manually when they are created. Separate each category by "; ".

Take Note

More   Toolbar   Save   Cancel

Title:
Researchers have taught nonprimate animals, such as parrots, to communicate meaningfully

Note Type: Link Relationship: Page Number: Categories
Idea   1

Researchers have taught nonprimate animals, such as parrots, to communicate meaningfully. Parrots that participated in language acquisition studies learned to identify dozens of objects, distinguish colors, and make simple requests in English.

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 on 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.

+ Enter your ideas here   11 notes
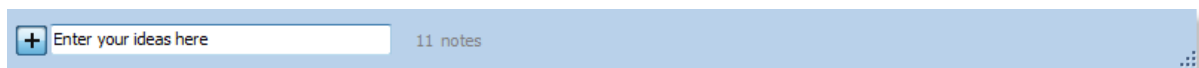
Capture content from the Web as new notes

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 as a note. To capture part of a web page as a note, first select the text you want to

capture. Then click the button "Capture Page". 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 "New Note" button. Enter a title first. You can leave the title blank, Biblioscape will use the first sentence of your note as the title. 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. You can toggle the formatting toolbar by clicking the right mouse button and select "Toggle Toolbar".

If you need to cite a reference while writing a note, clicking on the "References" button will display your reference collection. You can perform a search first, then drag selected references and drop them anywhere in your note to insert a temporary citation. This makes it

very convenient for you to cite a source while writing a note. On the "Categories" tab, you can click the check boxes to assign the current note to different categories.
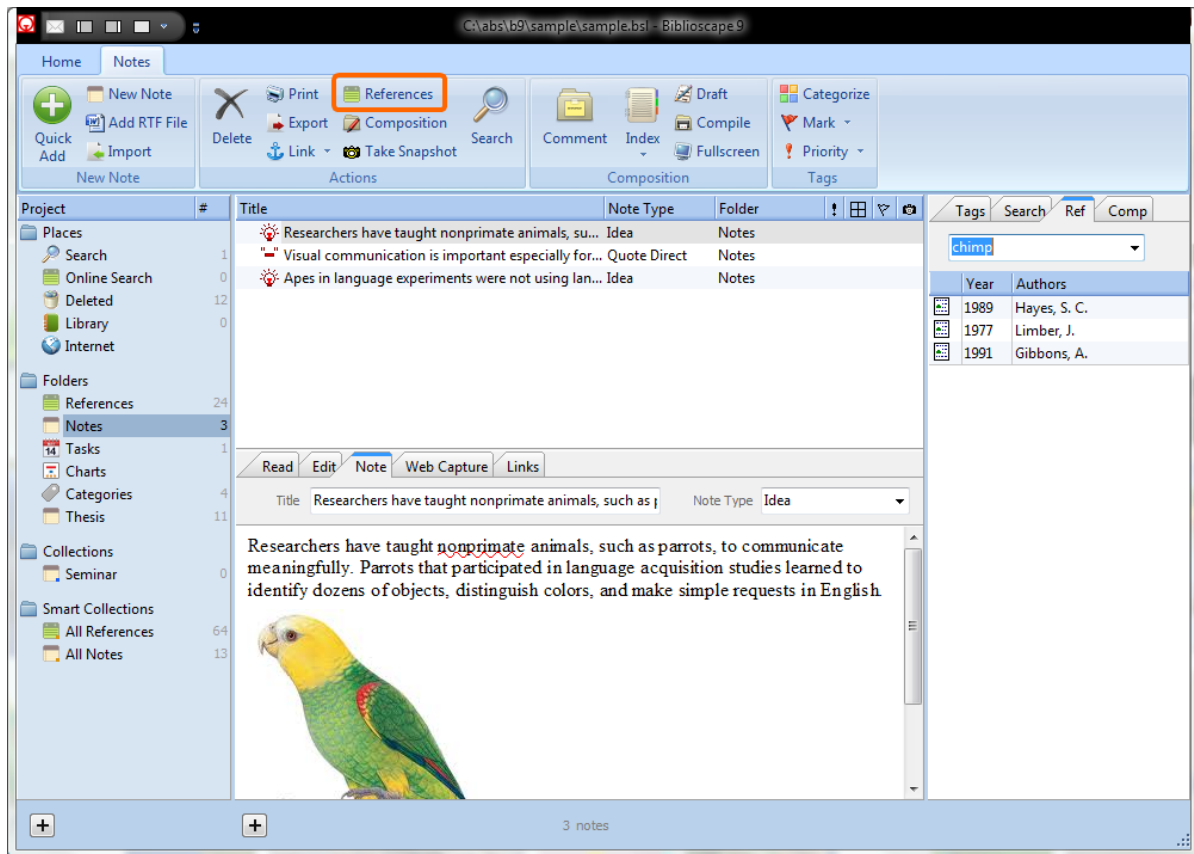
5.2   Import and export notes

Import notes

Biblioscape lets you import notes in different formats including: plain text, html, MS Access, Excel, Word, XML, DBase, Paradox, etc. The import wizard will walk you through the process step by step with many options.

1. Click the "Import" button under the "Notes" Ribbon tab.

2. If the file you want to import is a Biblioscape notes export file, you can leave the import filter as "Biblioscape Note Tag File" and click the "Browse..." button to select the file you want to import.

3. If the file you want import is a delimited file, spreadsheet, or database, click the "More" button and select "Import from delimited file, spreadsheet, database, etc.". You can then follow step by step instructions to import records in many different

formats.

Export notes

You can export notes in different formats depending on your needs.

1. Click "Export" button under the "Notes" Ribbon tab. All records in the current list view (folder or search) will be exported.

2. If you want to transfer the notes from one Biblioscape database to another, leave the "Export format" as "Biblioscape Note Tag File". Click the "Browse..." button and select a destination folder and file name.

3. If you want to send the export file to another program, click the "More" hyperlink and select "Export to delimited file, spreadsheet, database, etc.". You can then follow instructions in the export wizard to export.

5.3   Use notes in your writing

After reading the source and accumulating enough notes, you are ready to write the first draft. For a research paper, 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. If you need to write a book or thesis, it is better to do all the writings inside the notes module. The tight integration between the references and notes module, notes versioning, outlining by drag drop make it easier to work on a big project inside Biblioscape than a traditional work processor. We will discuss the details in the next chapter.

Transfer notes to a word processor

If you use Microsoft Word or Corel WordPerfect, you can shoot a note to your word processor. In the "Note" tab, select the text you want to transfer. If no text is selected, the whole note will be included. Click the right mouse button and select "Shoot to Word" to shoot the selected text into your word processor document. 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]".

Assemble notes in the composition module

The Biblioscape notes module is also 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 by drag and drop individual notes will be much faster than doing copy and paste in a word processor. You can also assign index terms to a note. When completed, clicking the "Compile" button will generate a formatted document with a Table of Contents, index, and formatted citation and bibliography. The composition features 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 Biblioscape, the problem can be solved with note versioning. In the note editor, 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 right clicking the mouse button and "Rollback Snapshot". To compare a snapshot with the current note, you can double click the snapshot note and place the two windows side by side.
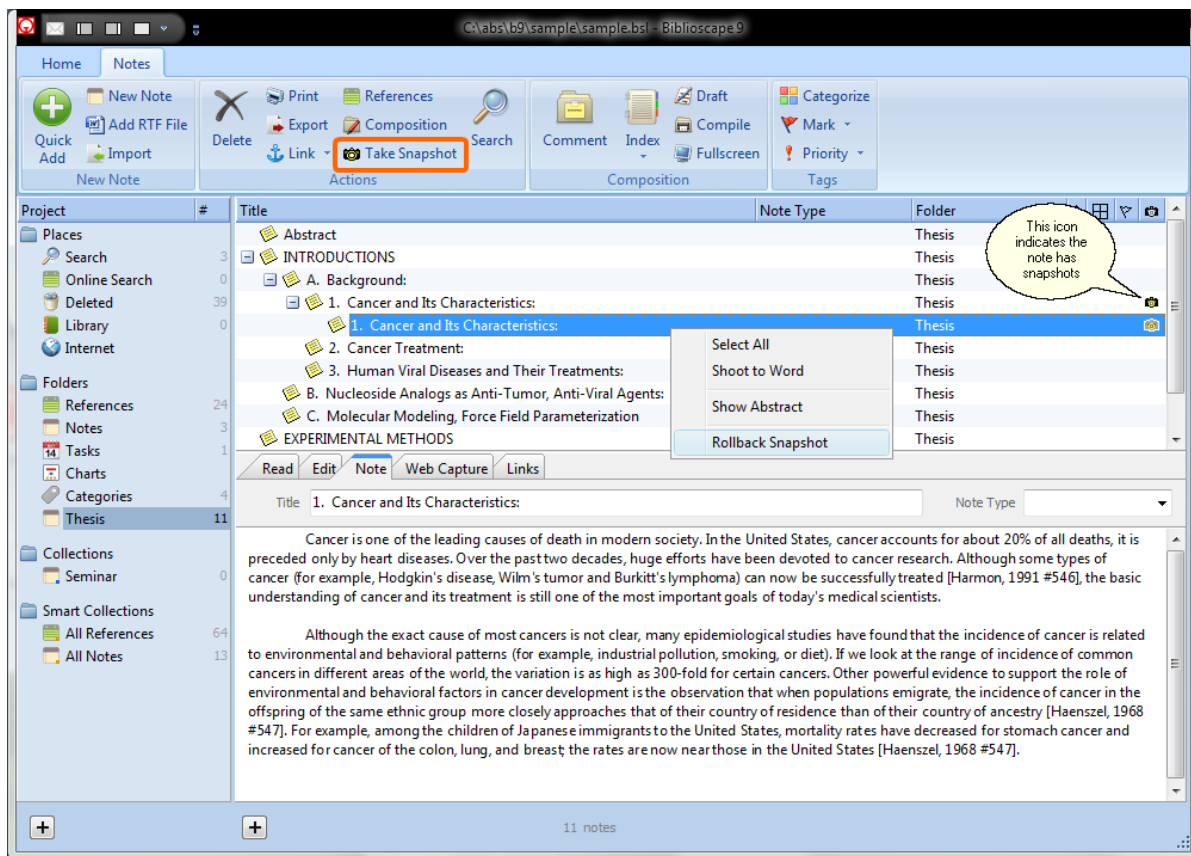
5.5   Note editor

The Biblioscape note editor is a simple word processor. All the commonly used formatting buttons are available in the toolbar at the top. If the toolbar is not shown, click the right mouse button and select "Toggle Toolbar". 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" button. Type the references search text and press the Enter key. The search text could be a folder name, author name, title, keywords, etc. 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.
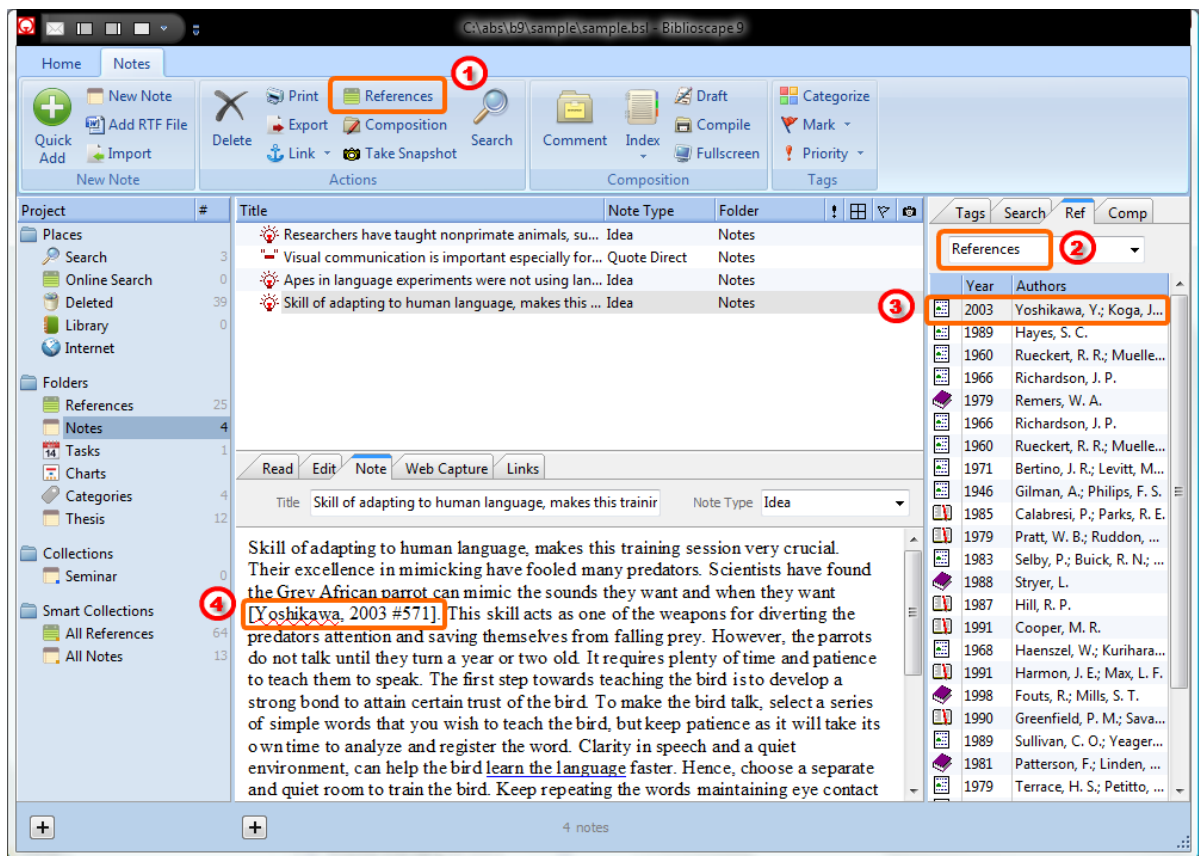
Categorize a note

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 note editor, click the "Categories" button first, you can drag and drop selected notes to a category on the right or you can click a category checkbox to tag a note.
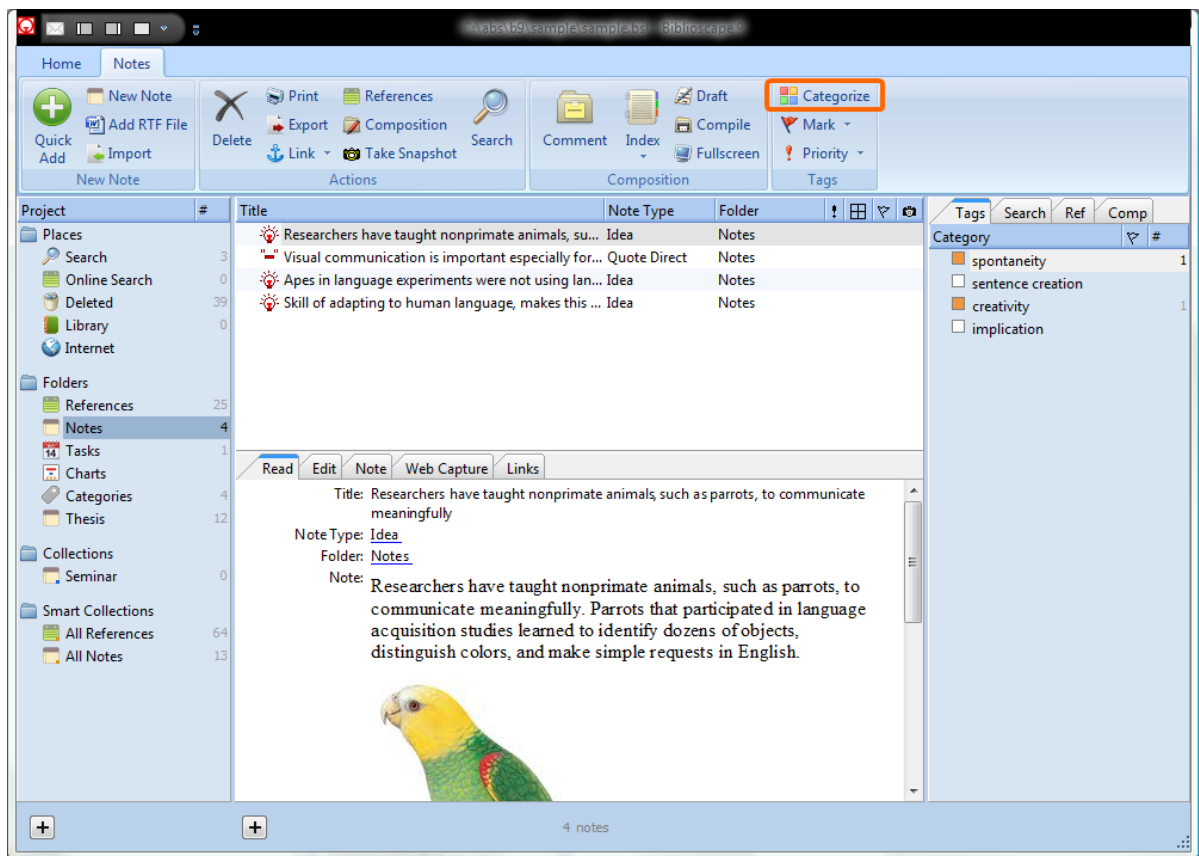
Link to other records

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. It is also possible to link selected text in a note to another record. First, select the text of interest. Then click the "Link" button drop down arrow and select the type of record you want to link to. Once a link is created, when you click on the hyperlink text, the linked record will be opened in a separate window.
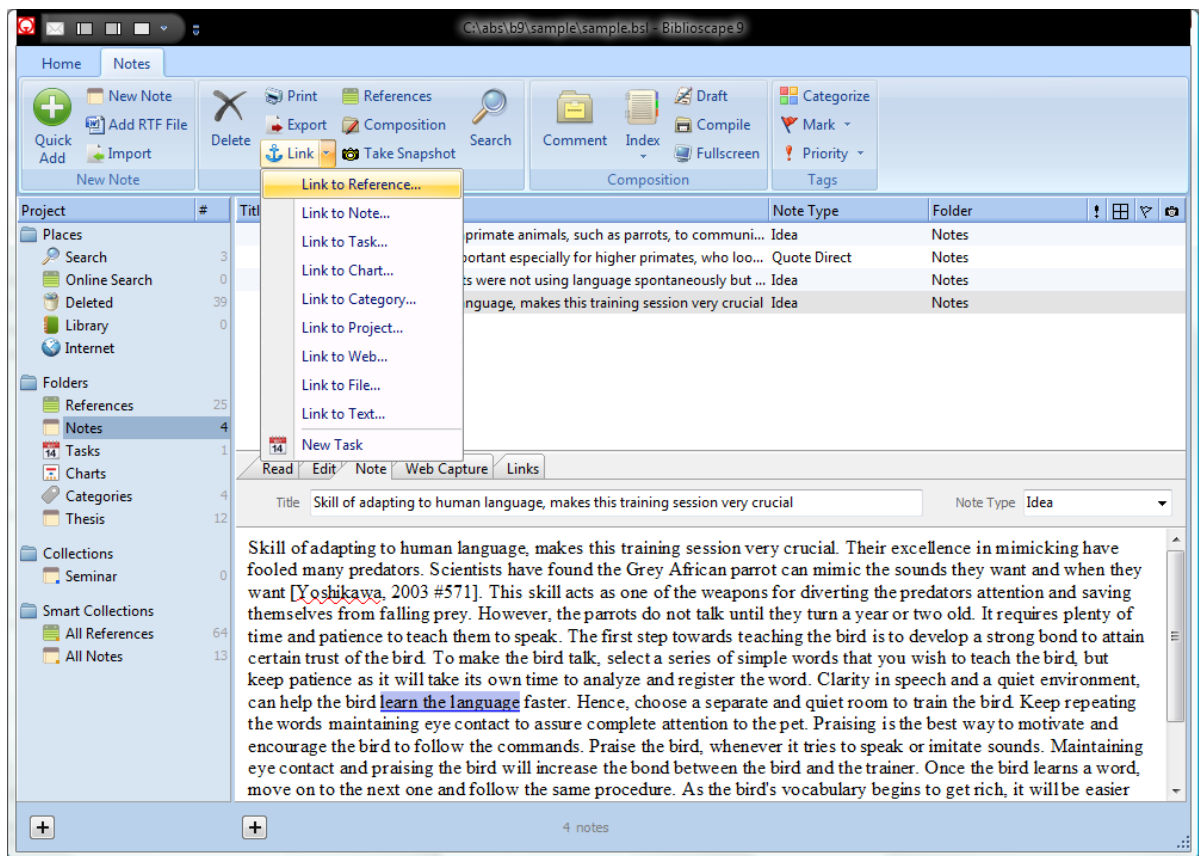
Footnote

Academic writers in the software science fields cannot get by without using footnote. To add a footnote in the note editor, click the right mouse button and select "Insert Footnote". Enter the footnote text. If you want to cite a reference in the footnote, click the "References" button under the "Actions" Ribbon group. Enter the search text and press the Enter key to find the references you want to cite. Then drag and drop the reference into the footnote. The selected reference will be inserted into the footnote in the form of a temporary citation. When you compile the notes, make sure a footnote style is selected to generate citations and a bibliography. All Biblioscape footnote styles start with "*". For example, "*MLA (notes)" is a footnote style that is used in the field of arts and humanities.

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. 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 features 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 notes 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 to copy and Ctrl+W to shoot) as well as formatted references (Ctrl+B to copy).

Copy temporary citations

Select the reference you want to cite and click the "Temporary" button under the "Citation" group. You can also press shortcut key 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 to generate bibliography. 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. Click the "Formatted" button under the "Citation" group (shortcut Ctrl+B).

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 Biblioscape toolbar. You can use the combo box on the Biblioscape references module toolbar to switch to another style. To view how a record will be formatted, select the "Formatted" tab on the preview panel.

Shoot references from Biblioscape to Word or WordPerfect

Biblioscape 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 the "Shoot" drop down button. Before using the "Shoot" commands, please make sure the Word or WordPerfect 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 Biblioscape.

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.

6.1.2   From temporary citations to formatted document

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 your 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 bibliography 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 the "Temporary" button to copy the temporary citation into the clipboard. 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 the "Format" button under the "Bibliography" group. Then click on the "Browse" button and select the RTF file you want to format.

3. Select the desired Style.

4. Press the "Start" button. Biblioscape will convert the tagged document into a formatted document with properly formatted citations and a bibliography.

Temporary citation matches

During the formatting of a paper, Biblioscape extracts the temporary citations in the paper, and searches the database to find records that match each of the citations. If Biblioscape can't find a match, it will insert ((reference not found)) into the place of the temporary citation.

Sub-style not defined for reference type in the selected style

During the formatting of a paper, Biblioscape will use the sub-style that matches the reference type of your temporary citation. If such a match can't be found, Biblioscape will use the default "Generic" sub-style 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, the "Generic" sub-style will be used.

Format and unformat an HTML file with temporary citations

Biblioscape can also format and unformat a HTML document. You should follow the same procedures as described above. Biblioscape will create a hyperlink automatically between in-text citations and its corresponding reference in the bibliography section.

Journal submission and hidden text

When converting temporary citations to formatted citations and a bibliography, Biblioscape adds hidden text around formatted citations and the bibliography. So if needed, Biblioscape 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. Biblioscape offers the option to format a manuscript without adding hidden text. In the "Options" window "References" 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.

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

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

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

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.
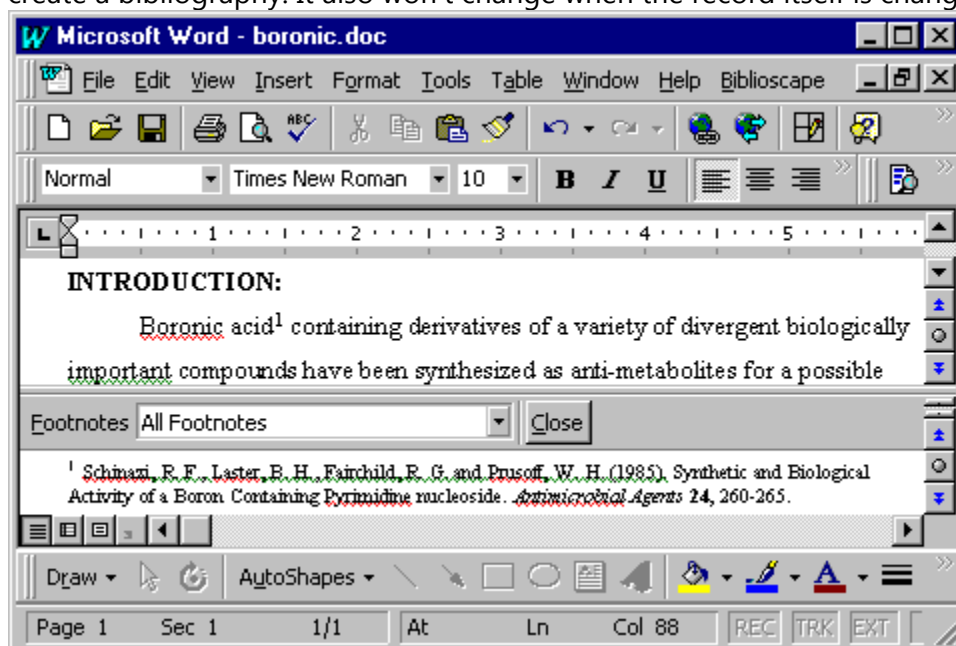
Insert Temporary Citations in Footnotes

You can also insert temporary citations into footnotes. When Biblioscape 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.
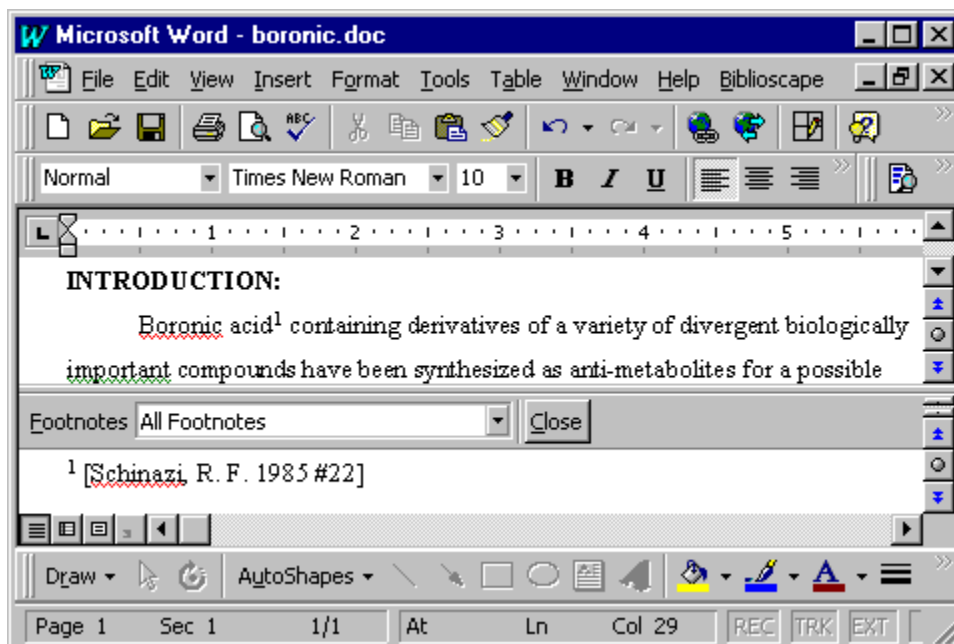
6.1.2.3   **Insert temporary citations**

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 "Biblioscape | 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 wether 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 Biblioscape, 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 interest1.

- 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 Biblioscape, in order to generate formatted in-text citations and a bibliography, you need to insert unformatted citations called temporary citations first so the Biblioscape 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, Biblioscape will use the text after # to identify a record. If ambiguities arise, Biblioscape 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, Biblioscape 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

"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)". Biblioscape 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 temprary citations

You can convert a Biblioscape 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 Biblioscape, 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 Biblioscape. On the "Format Manuscript" tab, check the box "Format double byte languages". Now, while unformatting a document, Biblioscape will generate the author year in the temporary citation directly from the record in the database instead of from the formatted document.

Note: Biblioscape can format and unformat document saved in RTF or HTML format.

6.1.4   Integration with word processors

Biblioscape can format documents saved in RTF or HTML format, so any word processor that support RTF or HTML can work with Biblioscape. Just insert temporary citations as needed and save documents in RTF format once finished writing. In Biblioscape, go to "Tools | Format Manuscript" to format the document and pick the desired style. For Microsoft Word and Corel WordPerfect users, Biblioscape provides better integration by allowing users to access Biblioscape commands from your word processor.

Integrate Biblioscape with Microsoft Word

You can add Biblioscape 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 "...\Biblioscape x\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

Going through RTF

Several WordPerfect macros are installed under the "...\Biblioscape x\Tools\" folder. To run these macros, please go to menu command "Tools | Macros | Play..." in WordPerfect. Go the the "Tools" sub-folder under Biblioscape installation and run the macros. The format and unformat operations defined in these macros all need to go through the RTF format. WordPerfect doesn't support RTF(Rich Text Format) as well as Microsoft Word. Some advanced features cannot be saved in RTF by WordPerfect. If you don't want to go through RTF, you can chose to use another set of macros listed in the next section that can format your document within WordPerfect.

- 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 "a".

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.

Format within WordPerfect

One of the main features of a bibliographic software is to format a manuscript by converting the temporary citations into formatted citations and a bibliography. Biblioscape does this by reading in the Rich Text Format (RTF) file or HTML file produced by a word processor and generating the formatted document in RTF or HTML. Since RTF is supported by all word processors on Windows, this approach guarantees that Biblioscape will work with all word processors. But there are two problems: First, RTF is very inefficient in saving graphics and OLE objects. When there are graphics and OLE objects in a document, Biblioscape can become very slow during formatting, or even hung up. Second, RTF is very well supported by Microsoft products like Word, but some word processors have problems with supporting some rarely used features when saving in RTF. The alternative approach is to do the formatting inside a word processor. Biblioscape will generate the formatted reference, while the word processor scripts (macros) do the formatting work. We first started this project with professor Hugh Gunz to find a better solution for WordPerfect users. Biblioscape was modified to return formatted references through Dynamic Data Exchange (DDE). Professor Hugh Gunz did all the original WordPerfect script coding. It was later improved by professor Yehuda Falk. We decided to make this an open source project, so other power users can improve the scripts, as well as porting it to other word processors like Word and OpenOffice.

- Click here to download the WordPerfect scripts by Hugh Gunz.

- Click here to download the WordPerfect scripts by Yehuda Falk.

6.1.5   Using Biblioscape 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 Biblioscape. 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 Biblioscape to do

If you want to use Biblioscape to manage your reference collection and write in a LaTeX editor, there are two things Biblioscape needs to do well.

Generate temporary citation for LaTeX

To add a citation for LeTeX, select the reference(s) you want to cite and click "Temporary | 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.

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, you can click the Export button and choose "LaTeX BibTeX" as the export format. You can then include this file with your LaTeX file for final processing using a LaTeX engine.

6.2   About output style

Biblioscape 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. Biblioscape 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@biblioscape.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.

Biblioscape styles

Biblioscape uses format filters called "output styles" to implement a style manual's specification regarding citations and the bibliography. Biblioscape comes with output styles for all major style manuals, as well as 1,000 plus styles for major research journals. The Biblioscape style editor allows users to edit or add new output styles, so you are not limited by the output styles provided with Biblioscape. Bibliographic styles are rules for the preparation of a manuscript. For bibliographic software like Biblioscape, 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. Biblioscape can handle both cases well. In the case of in-text citations, you insert Biblioscape 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 Biblioscape 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 dihydoorotase [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 dihydoorotase (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 dihydoorotase [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 dihydoorotase (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 Biblioscape temporary citations into the footnote or endnote. All Biblioscape 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 dihydoorotase[1].

Footnote: [1] [Yamamoto 1990 #49]
After formatting:
Main text: ...Boronic acid analogs have been synthesized as transition state analogs

for acyl transfer reactions, and inhibitors of dihydoorotase[1].

Footnote: [1] 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.
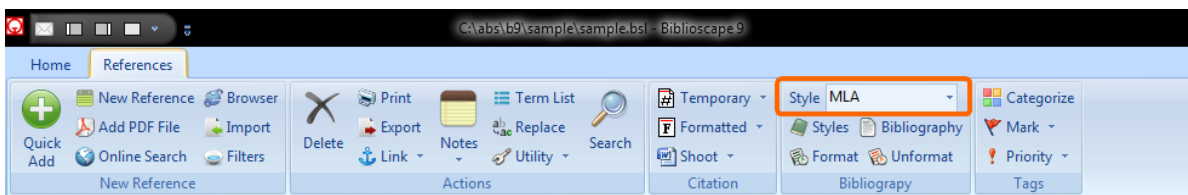
Bibliography

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 Biblioscape 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.
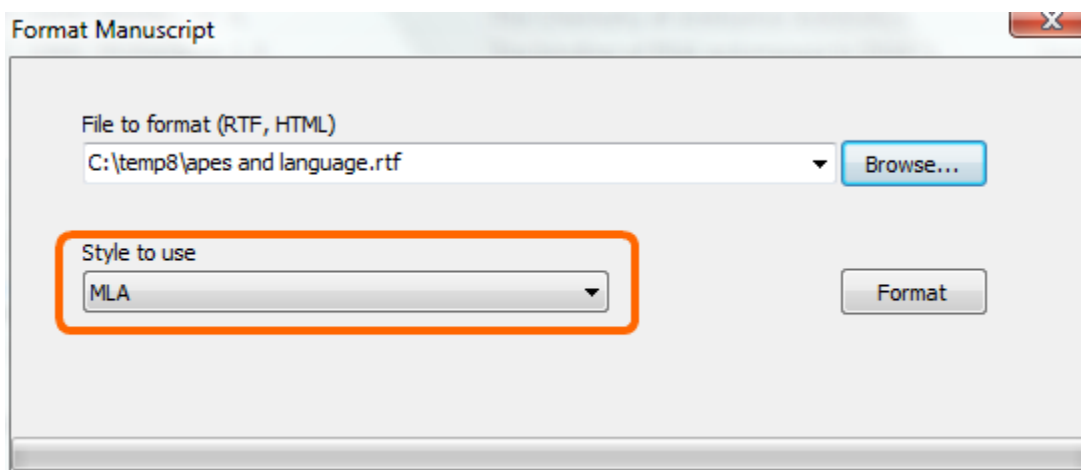
Biblioscape uses the selected style on the toolbar to format a reference when you use the command "Formatted". The selected style also determines how a reference is formatted in the "Formatted" tab of the preview panel.

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.
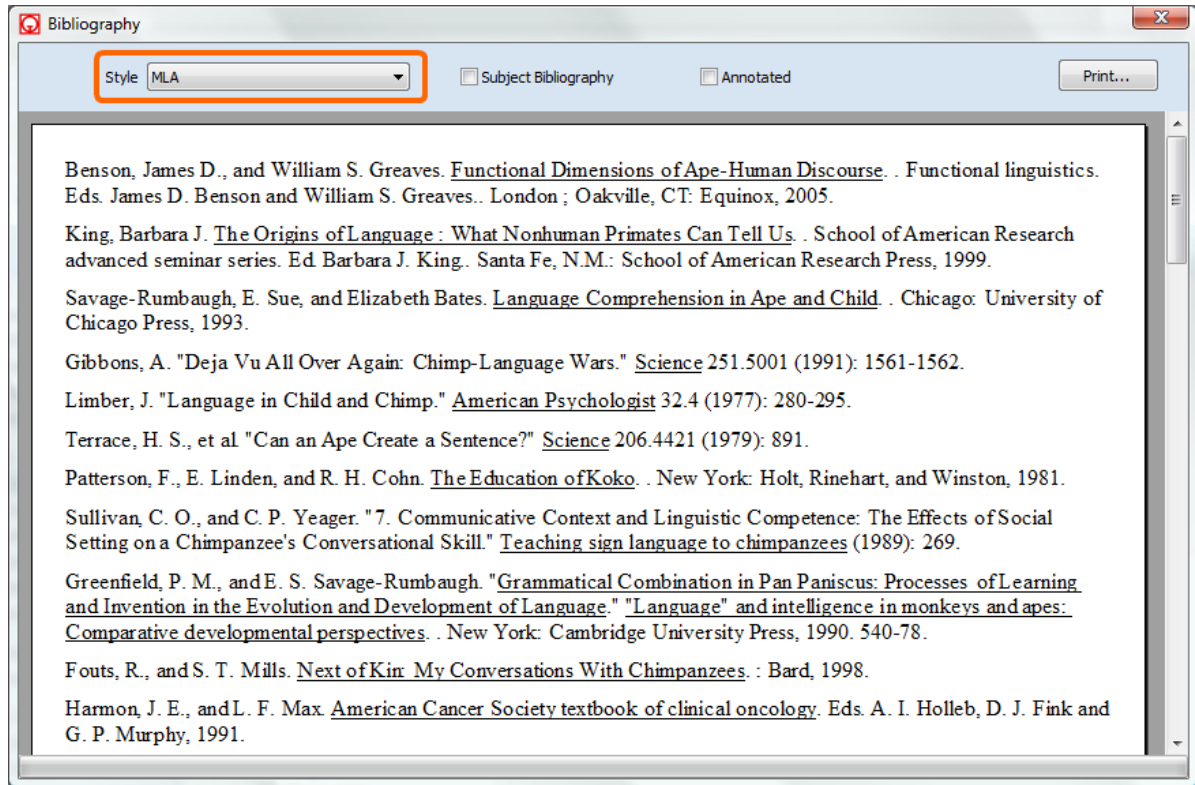
6.2.1 Manage output styles

Biblioscape 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.
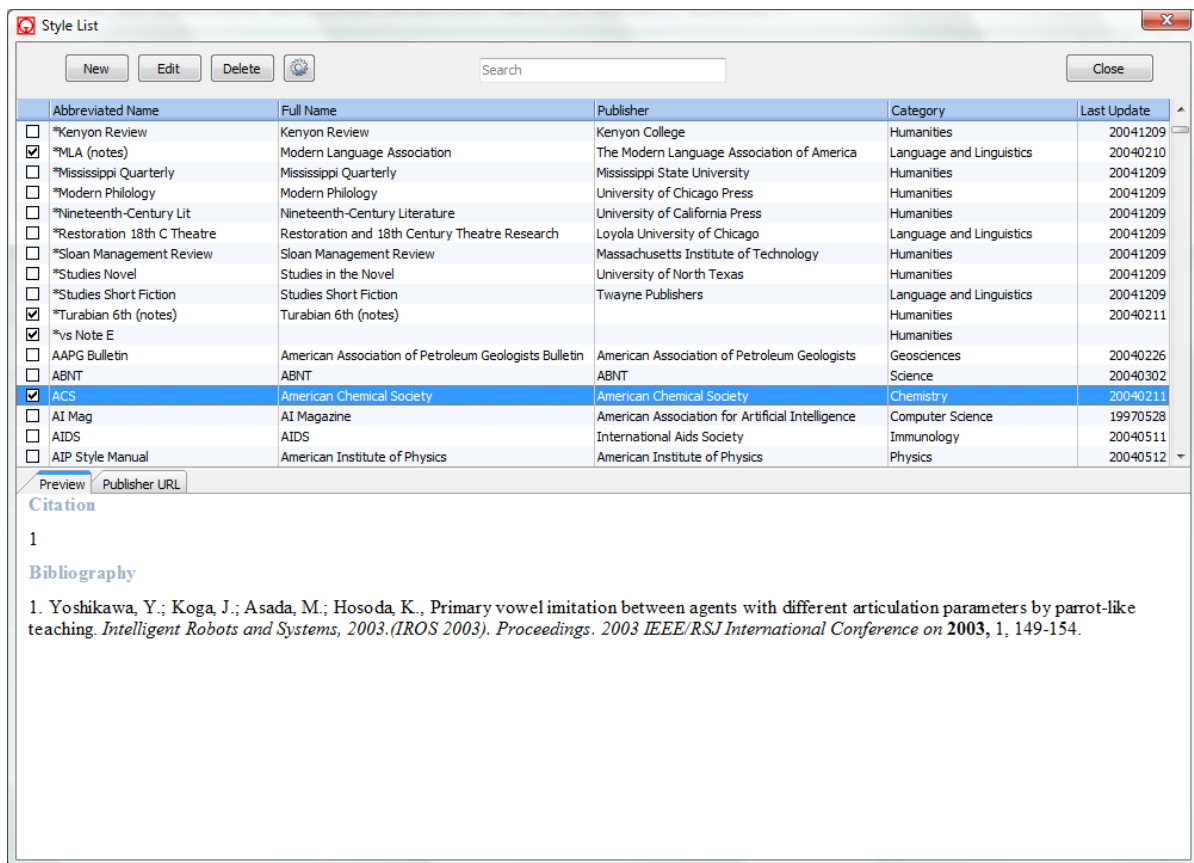
Output styles are usually named after a journal. Each output style has several sub-styles associated with each different reference type. For example, a "Journal Article" record is formatted differently from a "Book Section" record. To view general information about an output style, click the "Styles" button under the "Bibliography" group. Double click a style item to see the details. 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, enter the search text in the edit box and press the Enter key. All relevant styles will be listed. To display all styles again, empty the search box and press the Enter key again. You can also mark some styles as favorites by clicking the favorite box.

Sort or group styles

To sort styles, just click on the column header. Clicking again will sort in reverse order.

Import styles

1. Download the style file (*.bff) from the Web and save it under a folder.
2. Click the "More Actions" button and select "Import".
3. Select the 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 "More Actions" button and select "Export".
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, 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 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, click the "Styles" button under the "References" Ribbon "Bibliography" group to bring out the style editor.

Create a new style

1. Click on the "New" button.

2. Under the "General" tab, type in the relevant information about the new style. If the style is to be used for a footnote system, check the box "Use the style to format citations in 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 "Publisher URL" field.
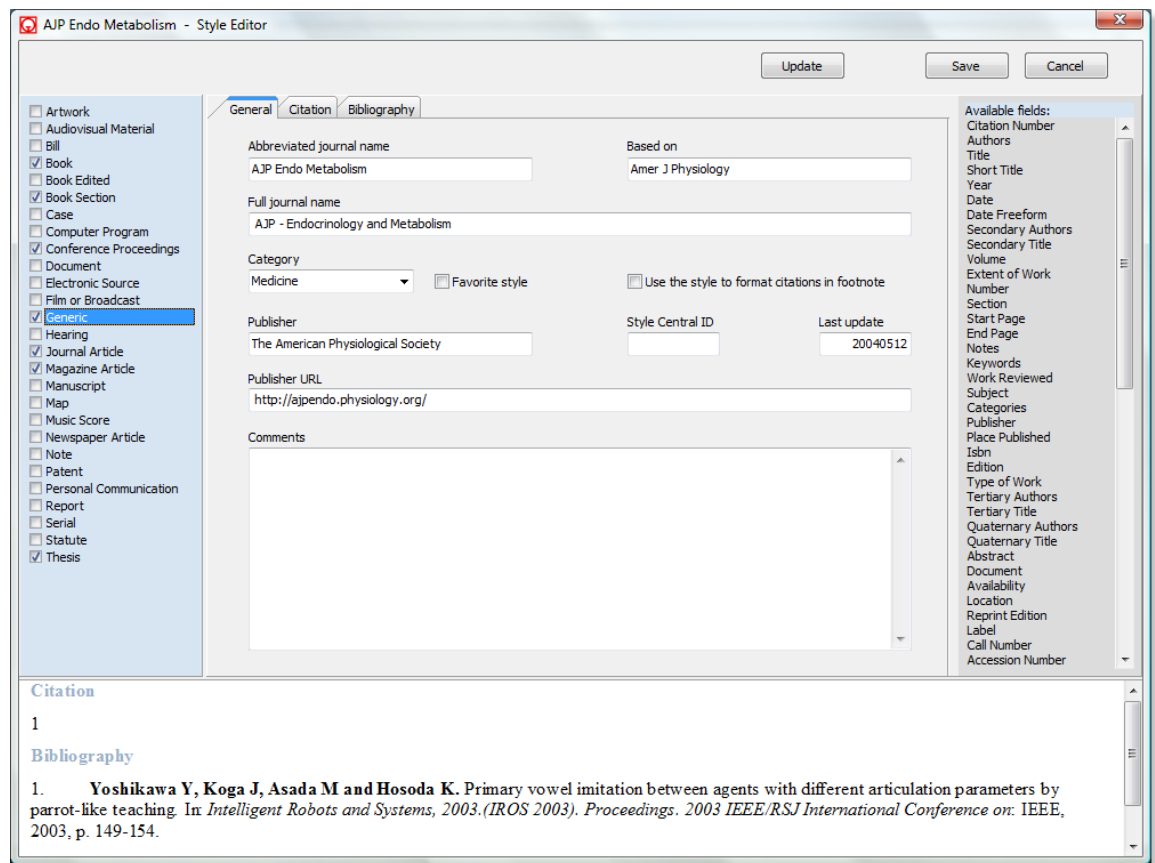
3. The first sub-style you work on should be the "Generic" type. It is used when no matching sub-style can be found for a reference type. After finishing the "Generic" sub-style, you can create other sub-styles by checking the box before the reference type on the left.

Define reference type specific sub-style

Besides the "General" tab, there are two tabs: "Citation", and "Bibliography". For styles that use in-text citation, the tab "Citation" controls how the citation number or author-date should be formatted. For styles that use footnotes, the tab "Citation" controls what fields to be included in the footnote and how they are formatted.

6.2.3   Citation settings

All the parameters for the formatting of citations as well as footnotes or endnotes are on the "Citation" tab. After being formatted by Biblioscape, 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 radio box "Number" checked.

2. You can change the font properties of the citation number by clicking on the "Citation" button.

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".

Citation Style

Citation

Biblioscape will use a number in the formatted citation. You can set the font for this number by clicking on the "Citation" button. You can change the number to superscript, italic, etc.

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), Biblioscape 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 surround 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 then 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.

Defining a style when citation uses text

1. When a citation uses text such as "Author + Year", keep the radio box "Author-Date" checked.

2. You can add more data fields to the "Citation Sequence" by dragging and dropping it

from list box "Available Fields".

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.

5. To edit the formatting information for each data field, double click the field name or click on the "Edit" button.

Sorting

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.

Ambiguous Citations in Author-Date

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. Biblioscape 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).

Defining a style that uses footnote or endnote
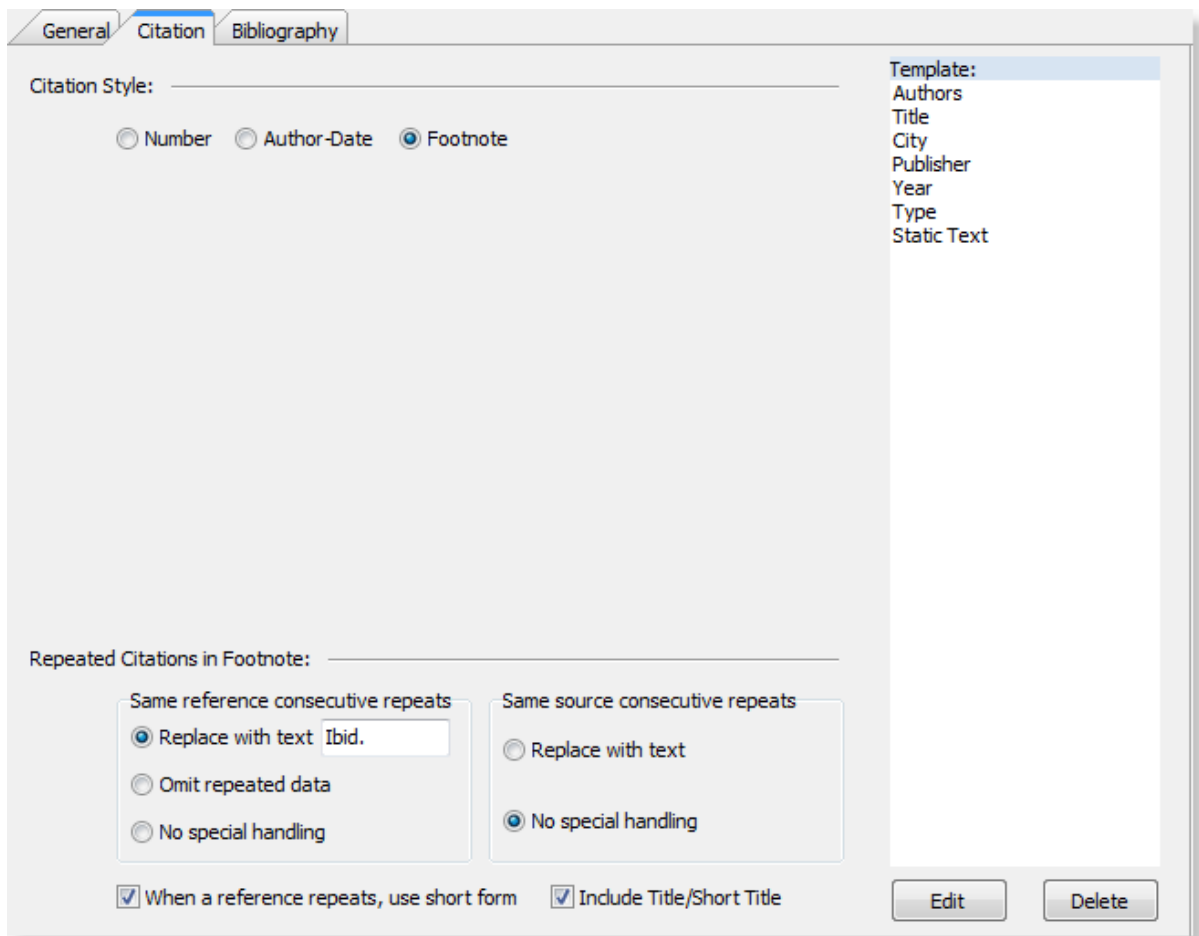
1. When citing references such as footnotes or endnotes, keep the radio box "Footnote" checked.

2. You can add more data fields to "Templates" by dragging and dropping it from the list box "Available Fields".

3. When citing as footnotes, "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.

Repeated Citations in Footnote

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, Biblioscape 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" 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.

6.2.4   Bibliography settings

The "Bibliography" tab 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". 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. 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.

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.

Sorting

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 selected, you can sort the references based on any data field in Blioscape.

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".

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.

Layout

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 "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.
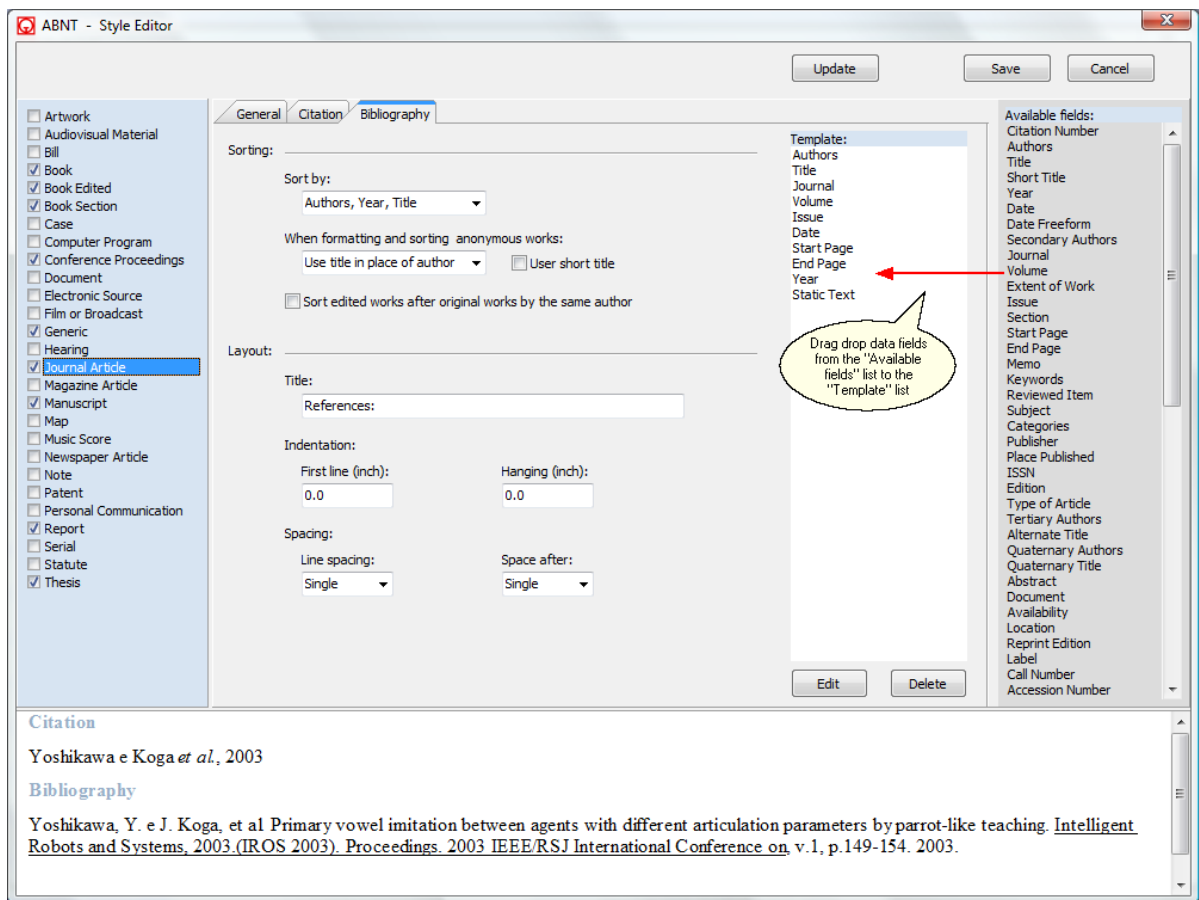
Text before and after a field
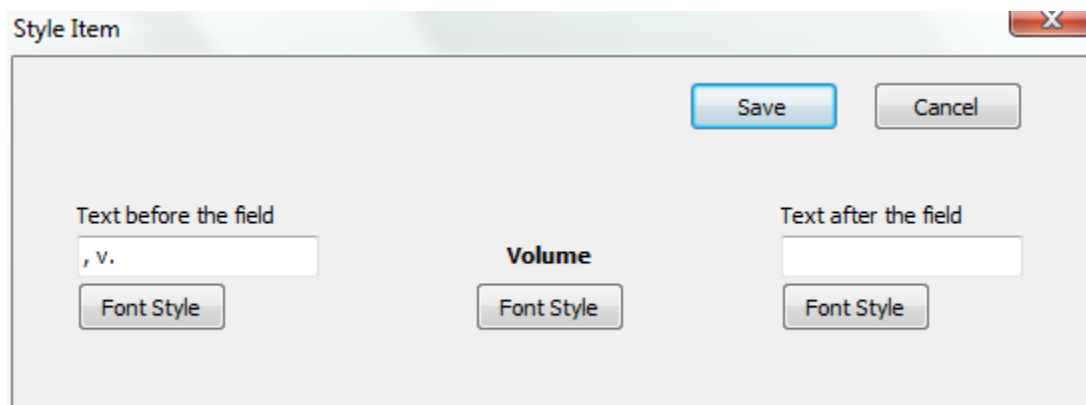
Double click on a field in the "Template" list box to specify how a field should be formatted. You can change its font properties or other properties that are specific to a field. There are two edit boxes before and after the field label. The text in these two edit boxes are dependent on the data field. 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

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

Some references have a large number of co-authors. You can chose 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

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".

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".

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
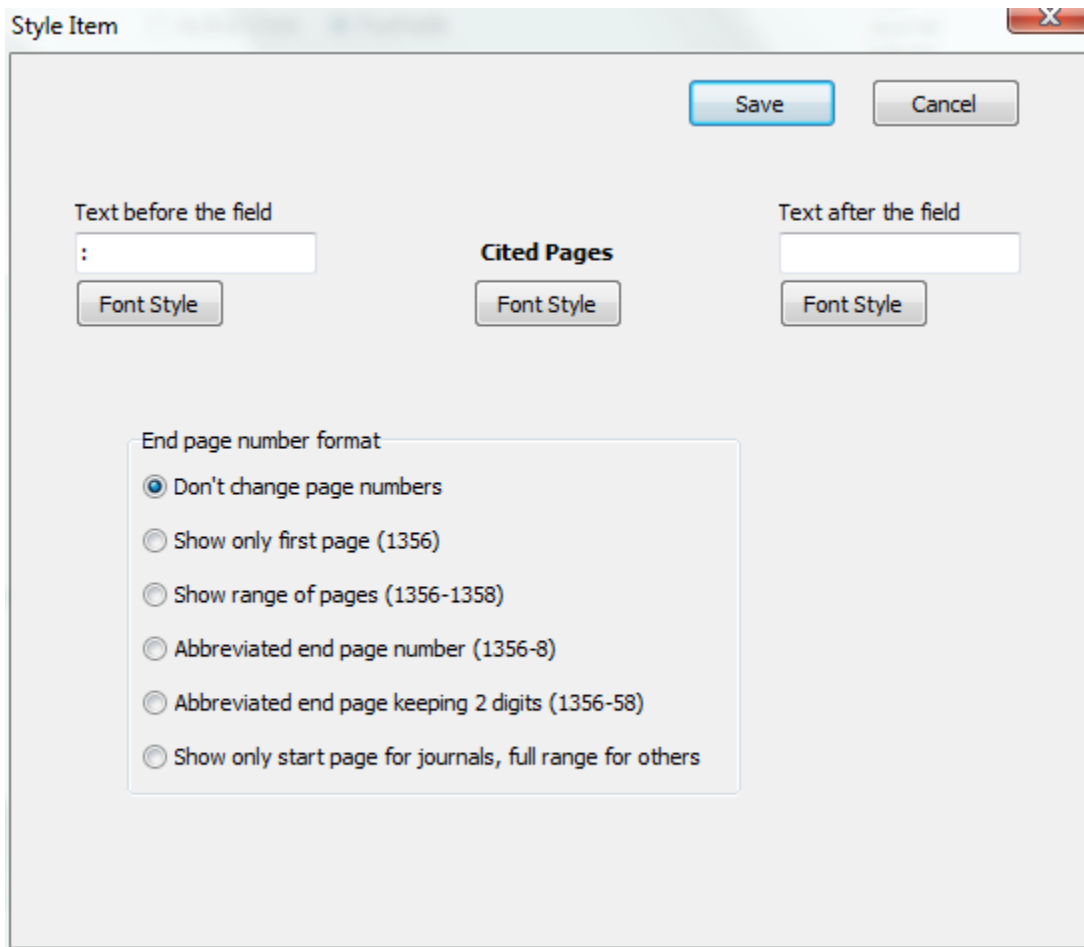
When citing references in author-date format, sometimes you want to include the cited pages. In Biblioscape, there are two ways to do so.

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 wether to ad "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 Biblioscape. 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
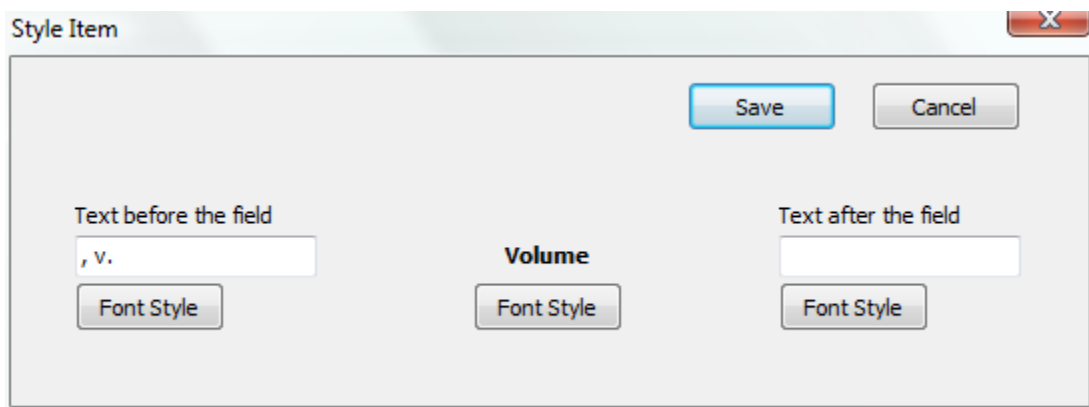
Don't change page numbers	The cited pages will be added as you enter them.
Show only first page (1356)	Only the start page will be shown.
Show range of pages (1356-1358)	Full page range will be shown.
Abbreviated end page number (1356-8)	The end page number will be abbreviated to the last possible digit.
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 Biblioscape 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, Biblioscape 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   Writing books and theses

The notes module is also designed to help users writing a thesis or a book. Working on such a big project is an evolutionary process. It is much easier to separate your writing into smaller pieces instead of one big file. 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 notes module allows you to easily organize your notes into an outline. A notes collection supports the reuse of your notes. The same note can be put into more than one notes collection and quickly assembled into different outlines. The notes 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.

In most cases, a folder should be used for a major writing project. In some cases, you may want to reuse existing notes to assemble a report, you can create a notes collection. Existing notes can be dragged into a notes collection. Notes in a collection can be ordered differently from its folder. Notes are the building blocks of a writing project. All outline entries are based on notes. You can drag-and-drop notes to an outline. When the note content is changed, the drafts built from those outlines are all changed accordingly.

6.3.1   Create an outline

An outline breaks down the parts of your writing 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. Biblioscape 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. After the brainstorming session, you can fill the content of your outline.
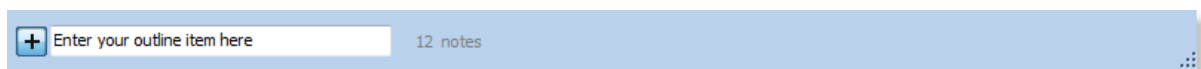
Build an outline from existing notes

For writers who like to work on details directly and build an outline later, Biblioscape provides an easy way to create an outline from existing notes. Select a note and drag drop it to another note. There are two possible outcomes. The dragged note will become a child note if your cursor is on top of note title before dropping it. In this case, a yellow arrow icon is shown before dropping the note. The dragged note will be moved on top of or below the dropped note if the cursor is on top of the note icon before dropping it. In this case, a blue up or down arrow is shown before dropping the note.

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.

Note editor

In the record pane, there are several tabs. The "Read" tab display your record in a table format. When you run a search, the search words will be highlighted in the Read tab. The "Edit" tab shows the meta data of a note including its Title, Type, Folder, Categories, etc. The "Note" tab is the place to write your notes. If the toolbar is not show, click the right mouse button and select "Toggle Toolbar" to show it. Most often used word processor commands are available on the toolbar. If you need to add a graphic, you should click the right mouse button and select "Insert Graphic" and select the file. Biblioscape will create a link to the file instead of saving the graphic inside the note which is inefficient.
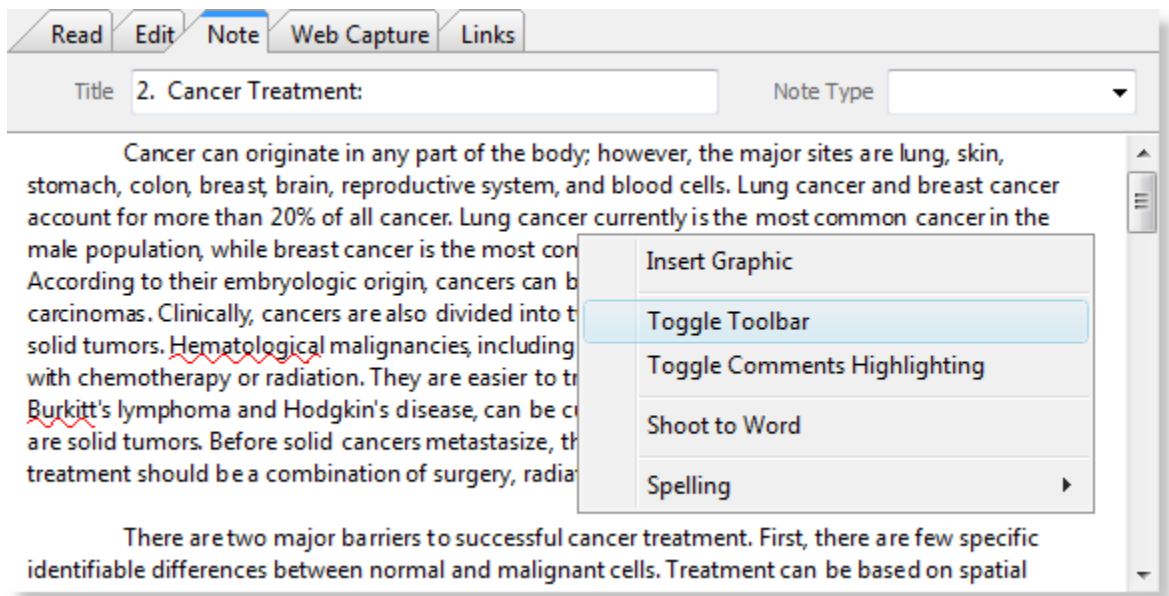
Display two notes side by side

When working on a big project, you may want to display two notes side by side. You can do this by a note item in the notes tree. The selected note will be opened in a separate window. You can then resize and position the two windows side by side.

Full screen editing

If you like to have a clean screen while writing, click the "Full Screen" button. The note editor will take all the screen space. All other windows and controls will be hidden. Press the Esc key to get out of the full screen mode.

Composition tab

The composition tab lists data fields that are relevant in a writing project. Click the "Composition" button to make the composition tab visible.

Abstract
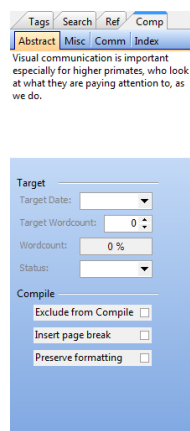
Abstract: You can write a brief summary of your note. When you browse your outline, you can quickly know what the note is about.

Target Date: Enter the target date to finish writing the current note.

Target Word 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.

Word Count: The number of words the current note contains.

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.

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 Biblioscape 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 Biblioscape to use the assigned font for this note, check this box.

Misc

Miscellaneous: If you want to include anything else about a note, enter it here. You can also paste graphics into this field. You can use the Misc field to store auxiliary information about the current note. This is a rich text field. You can access the toolbar by clicking the right mouse button and select "Toggle Toolbar". The text in Misc field can only be accessed from the current note. It is not a separate note. The other approach is to write a separate note and link it to the current note.

Comments

You can write comments about a note. Click the "Comment" button under the "Composition" group and start to type your comment. If you selected text in a note before clicking the "Comment" button, the newly added comment will be linked to the selected text. The selected text will be highlighted in yellow. The highlight color will not show in the compiled document.
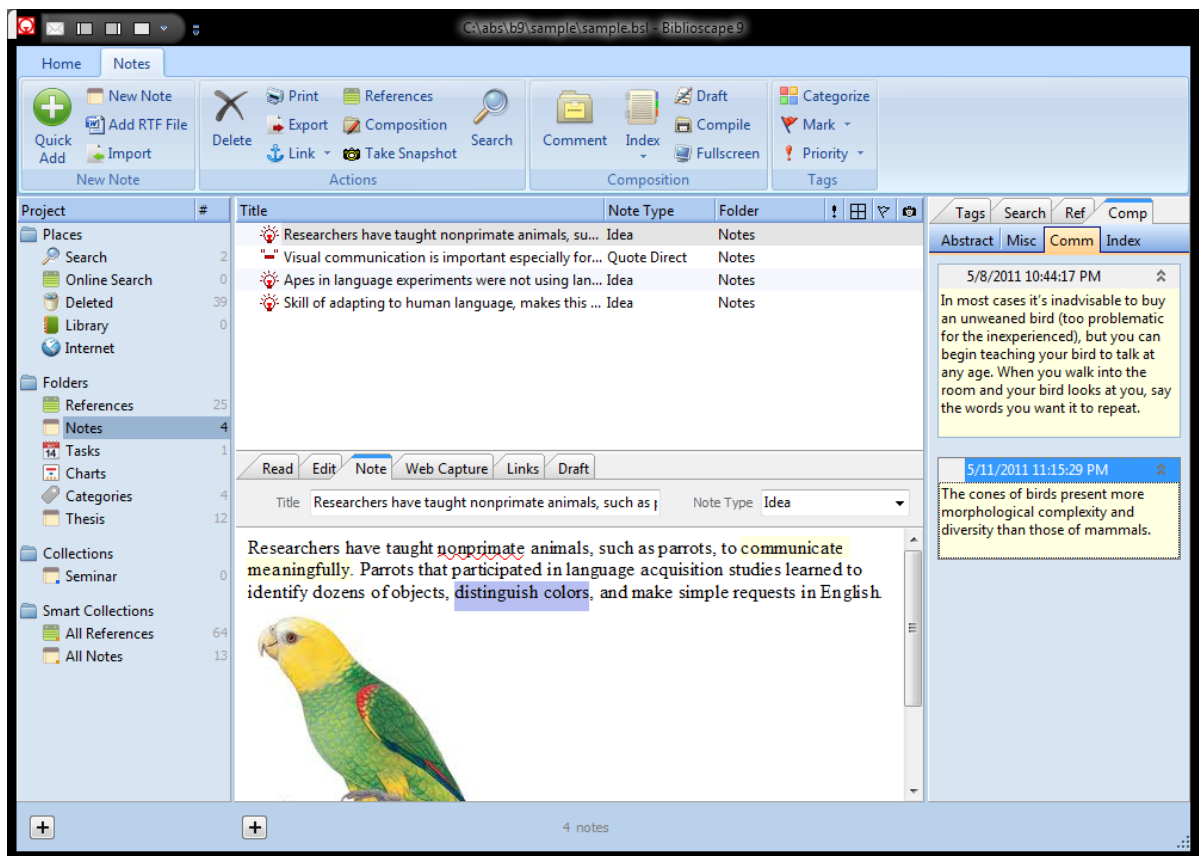
Index

You can add index terms to a note. In the compiled document, a full index will be built at the end. The next section will cover this in detail.

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 mode. First, select the notes you want to include. Then, click the "Draft" button under the "Composition" group. The selected notes will be combined and displayed in the draft tab. The title of each note is highlighted in light gray and cannot be edited. You can only edit the note text. If you want to save the changes you made in the draft tab back to the notes, click the right mouse button in the "Draft" tab and select "Save Back to Notes".
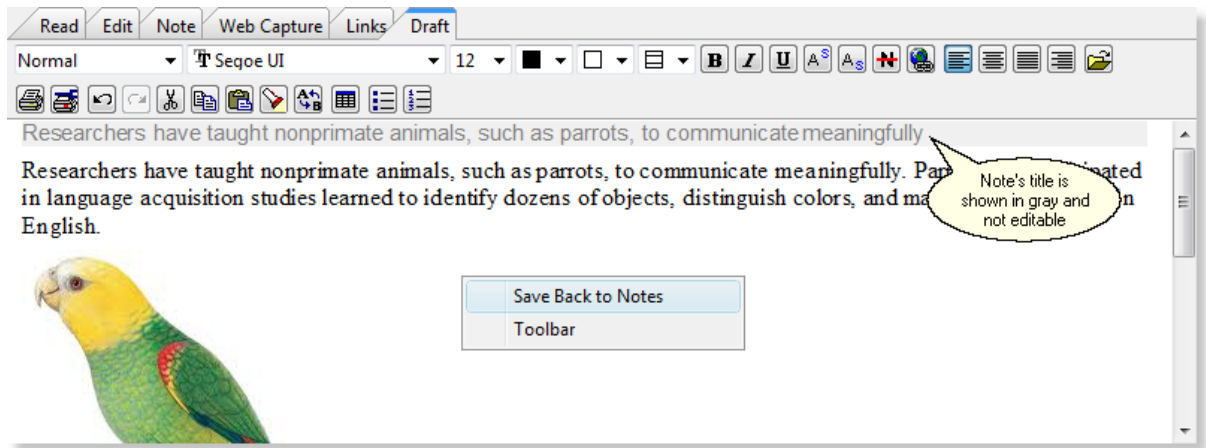
Cite references

While working on your first draft, you can insert a citation easily without leaving the notes module. Click the "References" button under the "Actions" group. Enter a search term and press Enter. The search term could be a references folder name, an author name, part of the title, etc. Select the reference you want to cite and drag and drop it to the note editor. The selected reference will be inserted as a temporary citation. When finished writing, click the "Compile" button to convert the inserted temporary citations into formatted citations and generate a bibliography.
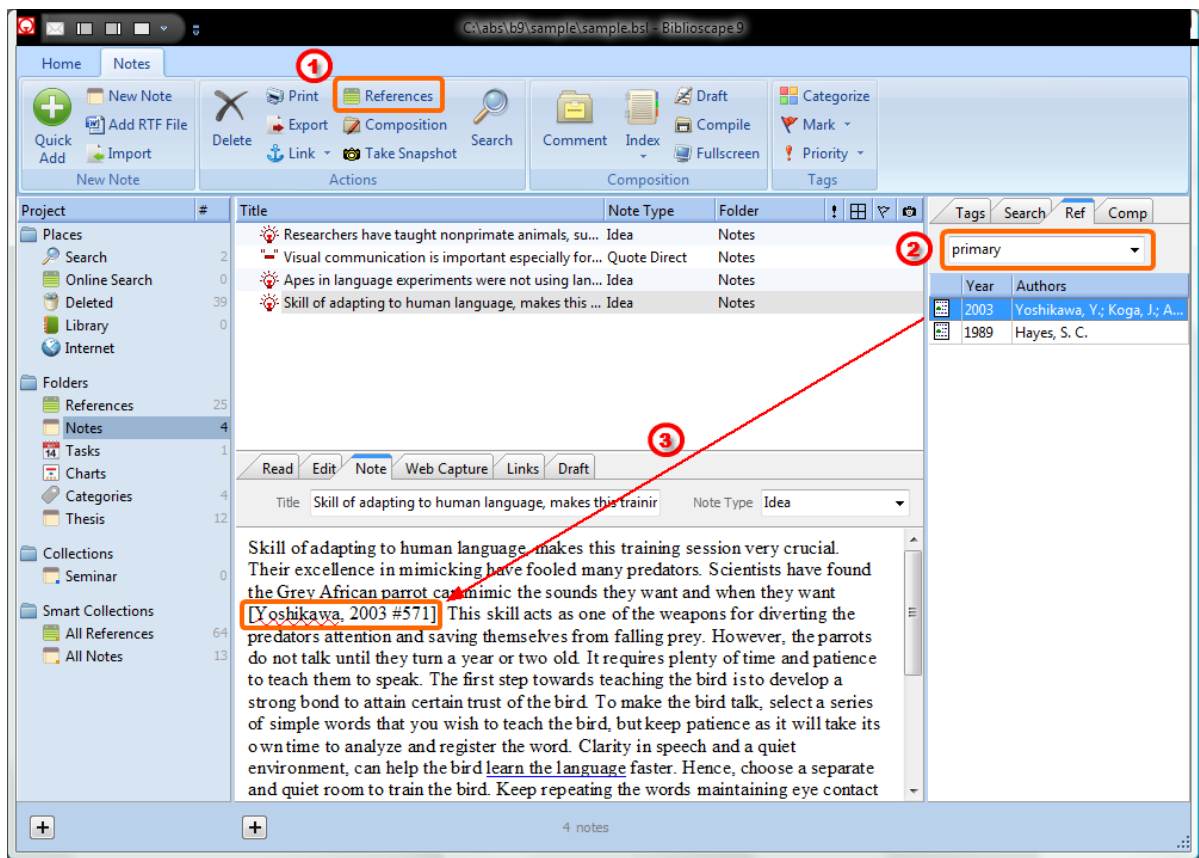
6.3.3 Build an index, suggested reading list, and glossary

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 part of your writing project, you can assign multiple index terms to it. Click the "Index" button on the Ribbon toolbar and enter an index term. You an also select a word in your note and drag drop it to the index list. 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. Click the right mouse button to edit or delete an added index term. By default, the index list shows the index terms associated with the current note. You can also display all the index terms associated with the current notes list which can be a folder, a collection, or search list. When you double click an index term, the associated note will be opened in the current note editor.
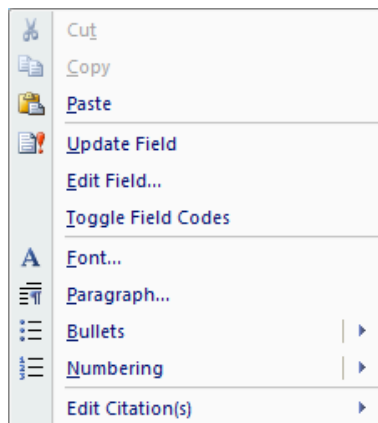
Extra step for Word 2007 users

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".

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.
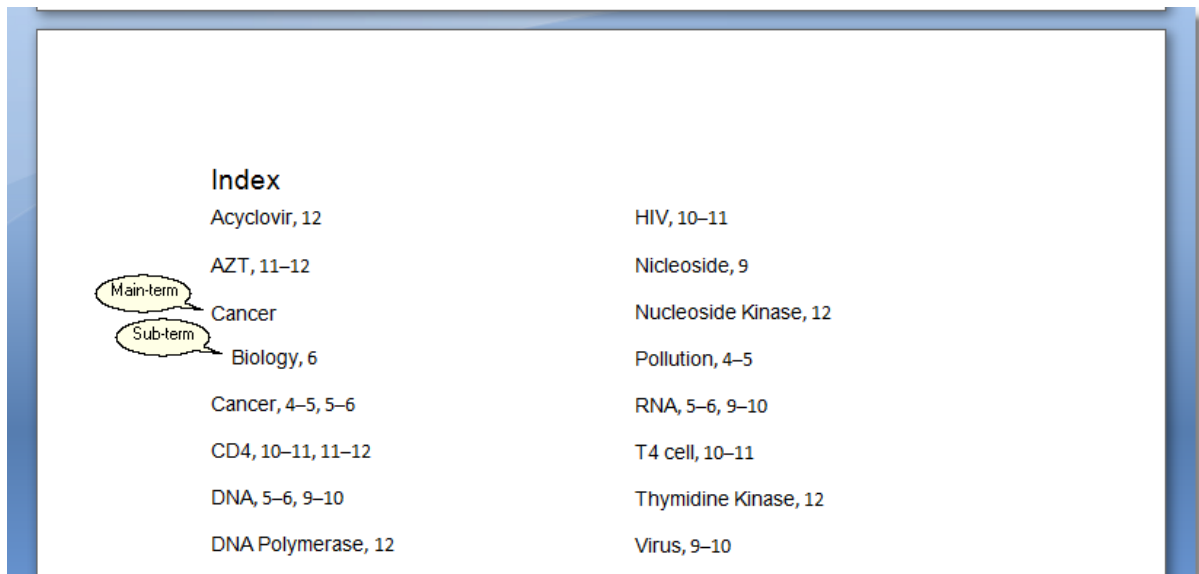
Build a suggested reading list

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 Biblioscape notes module, click the "Index" drop down arrow and select "Add Suggested Reading from Reference". In the next window select the references you want to add to the suggested reading list and click "Add Link". The added suggested reading will be shown under the "Ref" tab. Click the right mouse button, you can choose to show the suggested readings of the current note or all the notes under a folder.
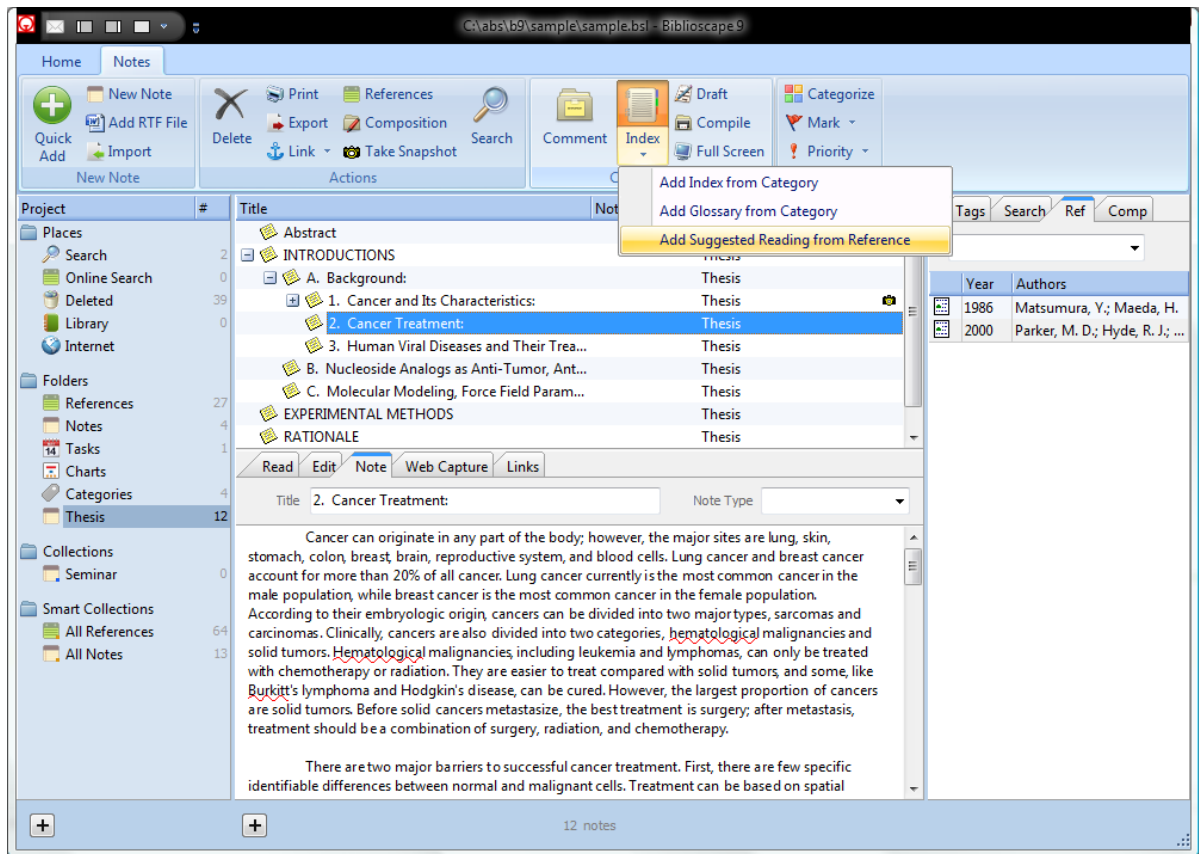
When you compile your composition project, there is an option to include the suggested reading list. You can chose the style to use for the suggested reading list and its sort order.
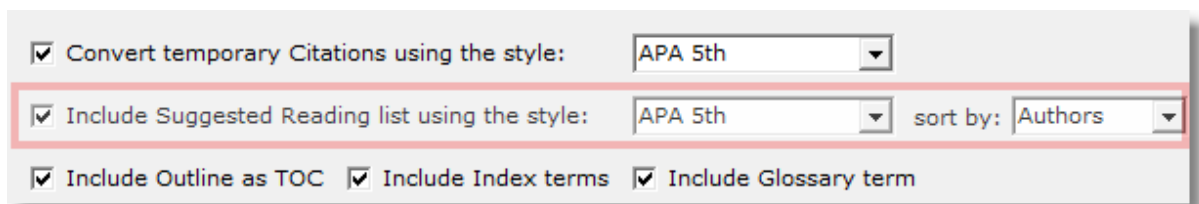
Build a glossary
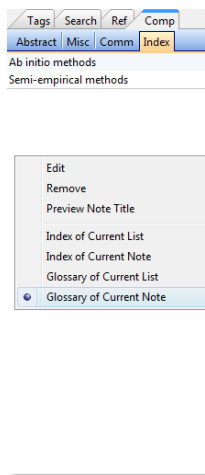
A glossary list is included at the end of a book or thesis. It shows a list of terms and their definitions. If you want to build a glossary list, you need to first go to a categories folder and create a list of categories, then add the definitions to the "Definition" field. Once you have the list prepared, go to the notes folder, click the "Index" drop down arrow and select "Add Glossary from Category". Select the category items and click the "Add Link" button. The added glossary terms will be shown under the "Index" tab. You can click the right mouse button and select to show "Glossary of Current List" or "Glossary of Current Note". When you compile the notes and chose to include a glossary list, the term and its definition will be included at the end of the compiled document.

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. Click the "Compile" button. How notes will be compiled is controlled by the selected settings file. To see the setting details, click the "More" hyperlink. 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" button. The generated RTF file can be opened by
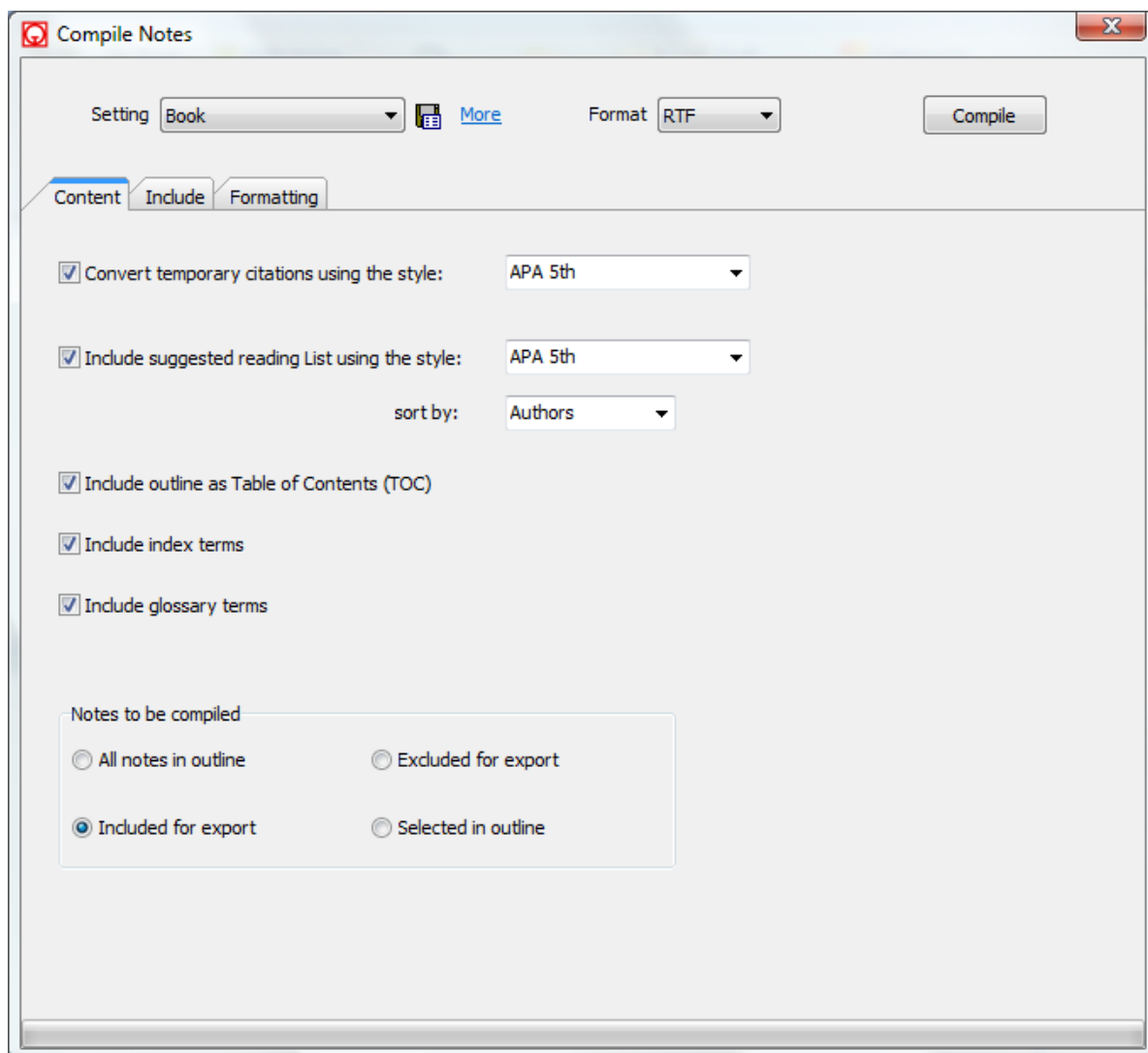
- Convert temporary citations using the style: Check this box to let Biblioscape convert the temporary citations to formatted citations and generate a bibliography according to the output style selected.

- 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, 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, 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.

- 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.
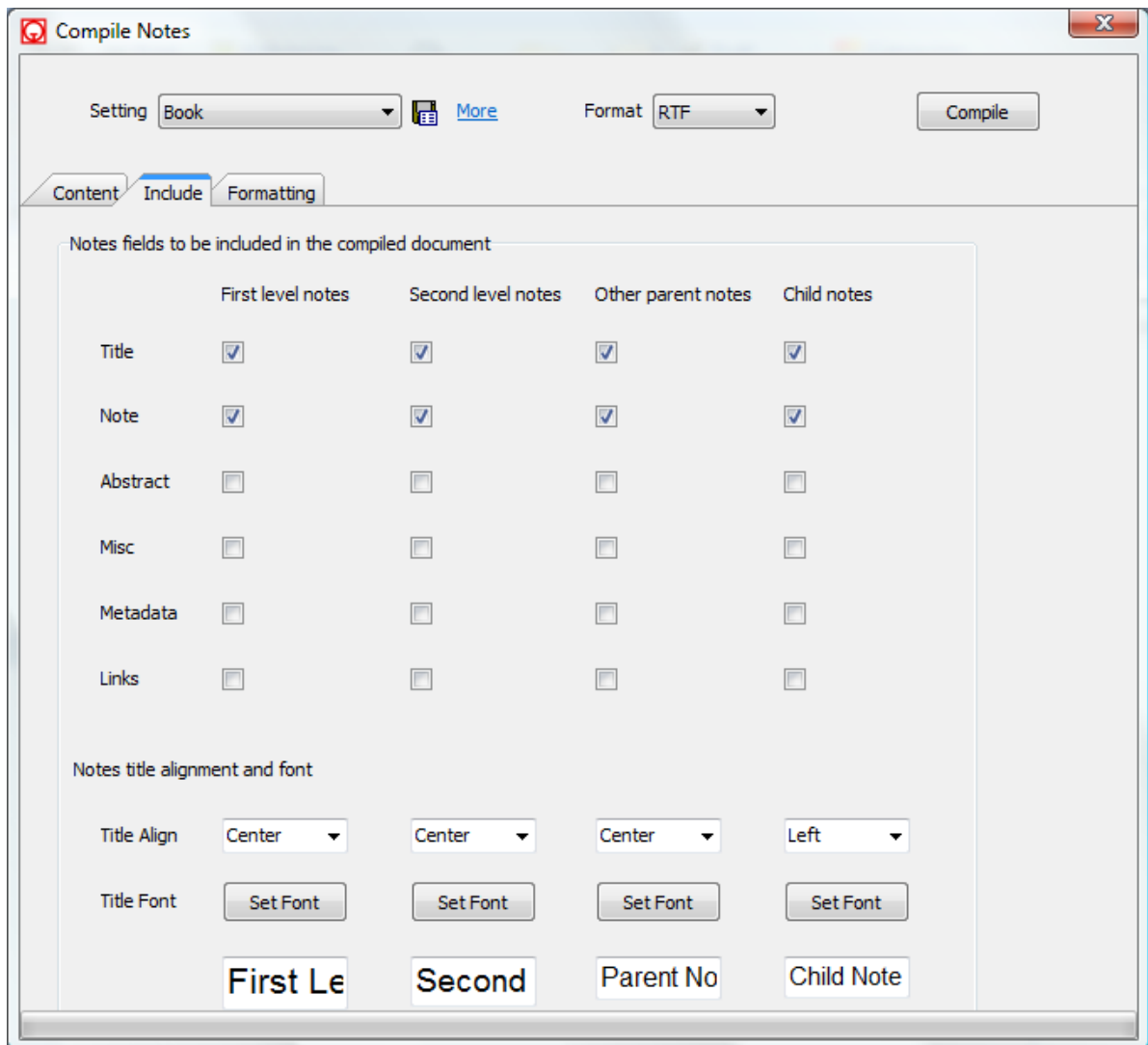
- Notes fields to be included in the compiled draft: Biblioscape treats notes included in the outline differently according to its position in the outline. There are 4 types of notes in this scheme: First level notes, second level notes, Other parent notes, and

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.
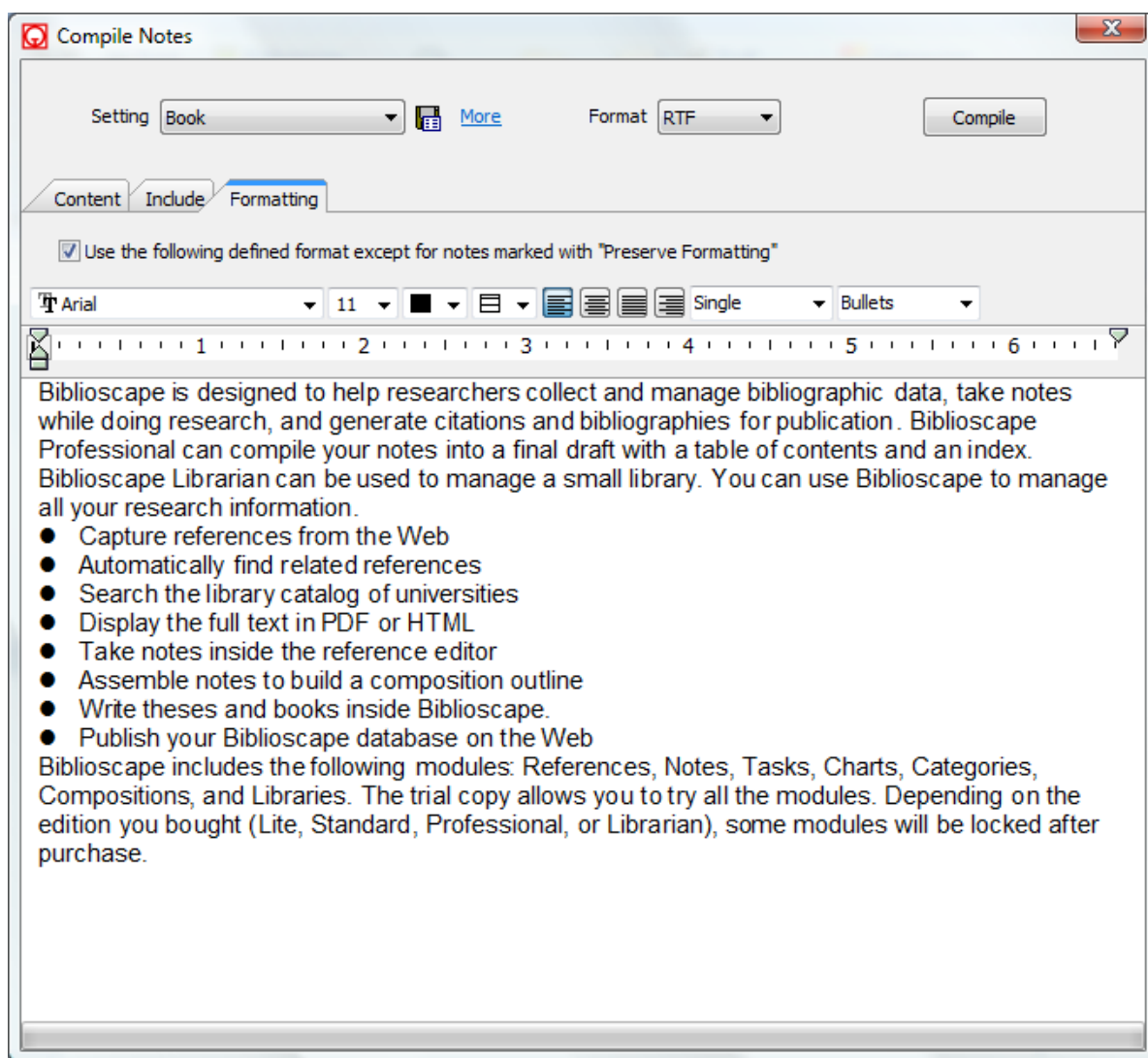
- Use the following defined format except for notes marked with "Preserve Formatting": Check this box to make Biblioscape use pre-defined text format settings for each note included in the outline so that the generated draft will have a consistent text format. For example, if note A is formatted in font "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.

Organizing information with categories

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

Part

VII

7   Organizing information with categories

The Biblioscape categories module is designed to organize references, notes, tasks, and charts by tagging. 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. 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 for multiple records, or click the category check box for a single record.

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 name, 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 drag and drop. You can build a parent child relationship by dragging and dropping selected categories into another category.

Add a category in the Categories tab
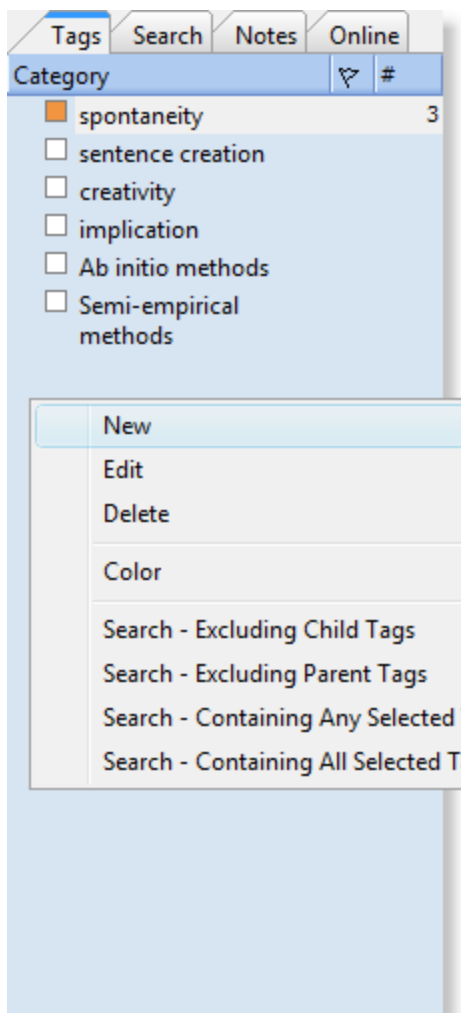
You can add categories directly in the Categories tab from another module. If you have only a few extra categories to add, this can be a convenient way to do so. If you have lots of categories to add, using Quick Add will be much faster. In the Categories tab, click the right mouse button and select "New Category". Type the new category name and press the Enter key.

You can reorder the categories by dragging and dropping selected category to its new position. You can also drag and drop selected categories to another position to create a parent child relationship.

Add a category in the category pane

To add a category in its own window, click the "New Category" button. First type the category name. In this pane, 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 separated by "; ". 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.

| Read	Edit	Links	
Category	Ab initio methods		
Category Type			
Category URI			
Other Names			
Definition	Ab initio quantum chemistry methods are computational chemistry methods based on quantum chemistry. The simplest type of ab initio electronic structure calculation is the Hartree-Fock (HF) scheme, in which the Coulombic electron-electron repulsion is not specifically taken into account.		
Checkings			

Import categories

You can export Biblioscape categories from one database as Biblioscape Category Tag File and import it into another database. If you already have a categories list from another application, you can import the file using the import wizard. Click the "Import" button. Click the "More" and select "Import from delimited file, spreadsheet, database, etc.". You can choose to import from a comma or tab delimited file, a 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. Click the "Categories" button if the "Categories" tab is not shown already. 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.
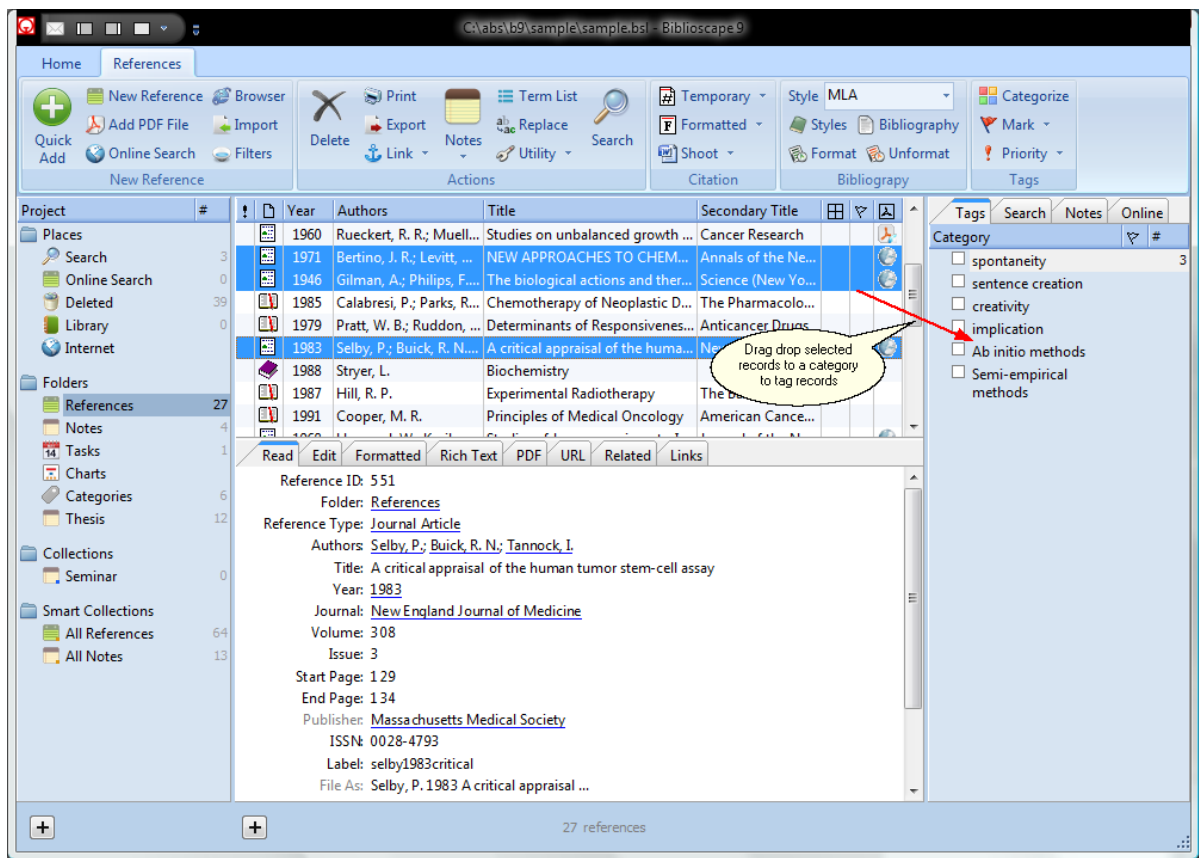
Tag a single record

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.
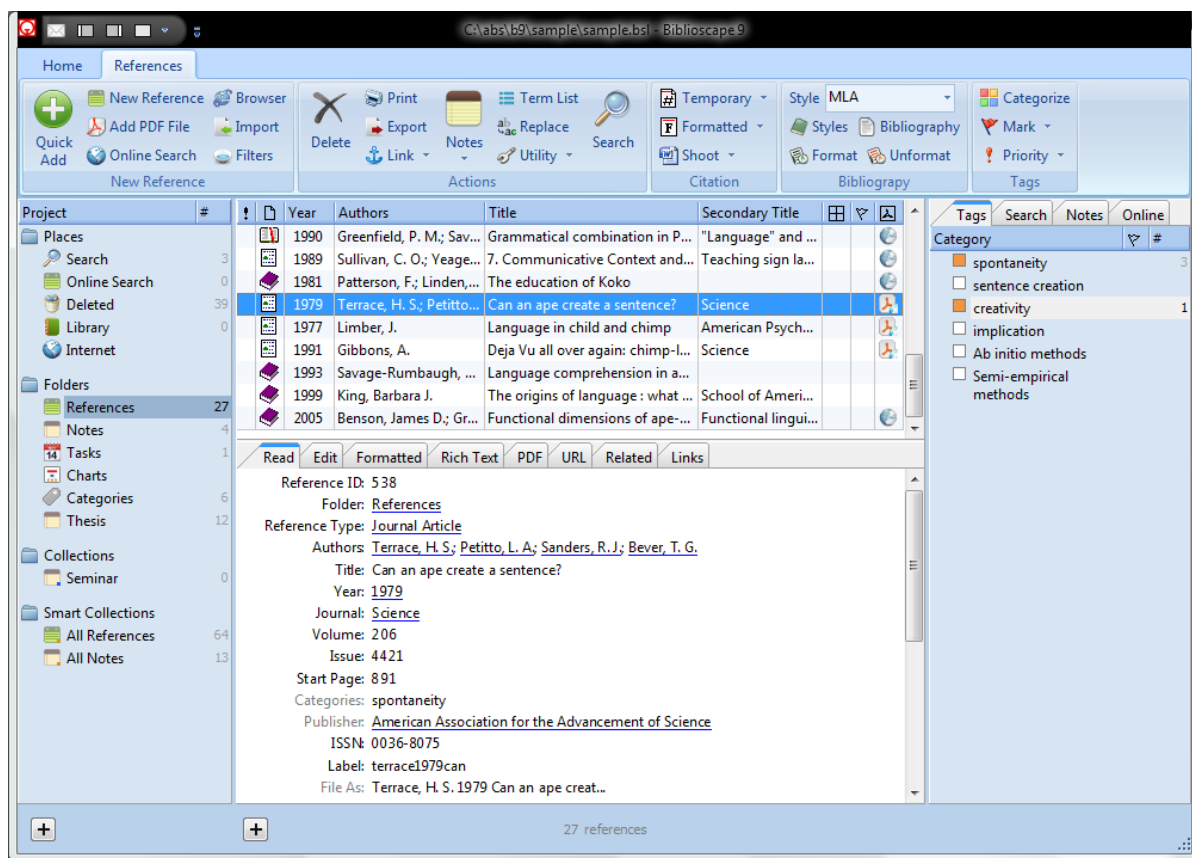
7.3   Organize with taxonomy

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

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
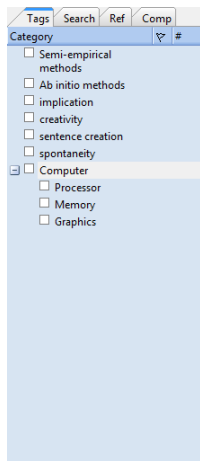
Categories can also be used to attach metadata to an information object (reference, note, task, chart). Metadata is data about other data. For example, if you have a note in the notes module about a laptop computer, you can have other data about the content of this note. When talking about laptop computers, 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 "Link | Link to Category…". Select the categories you have added about computer. These categories will become the property part of the property-value pair. On the right panel, select "Metadata" as "Link relationship". Leave the "Description" box blank. Now click the "Add Link" button.
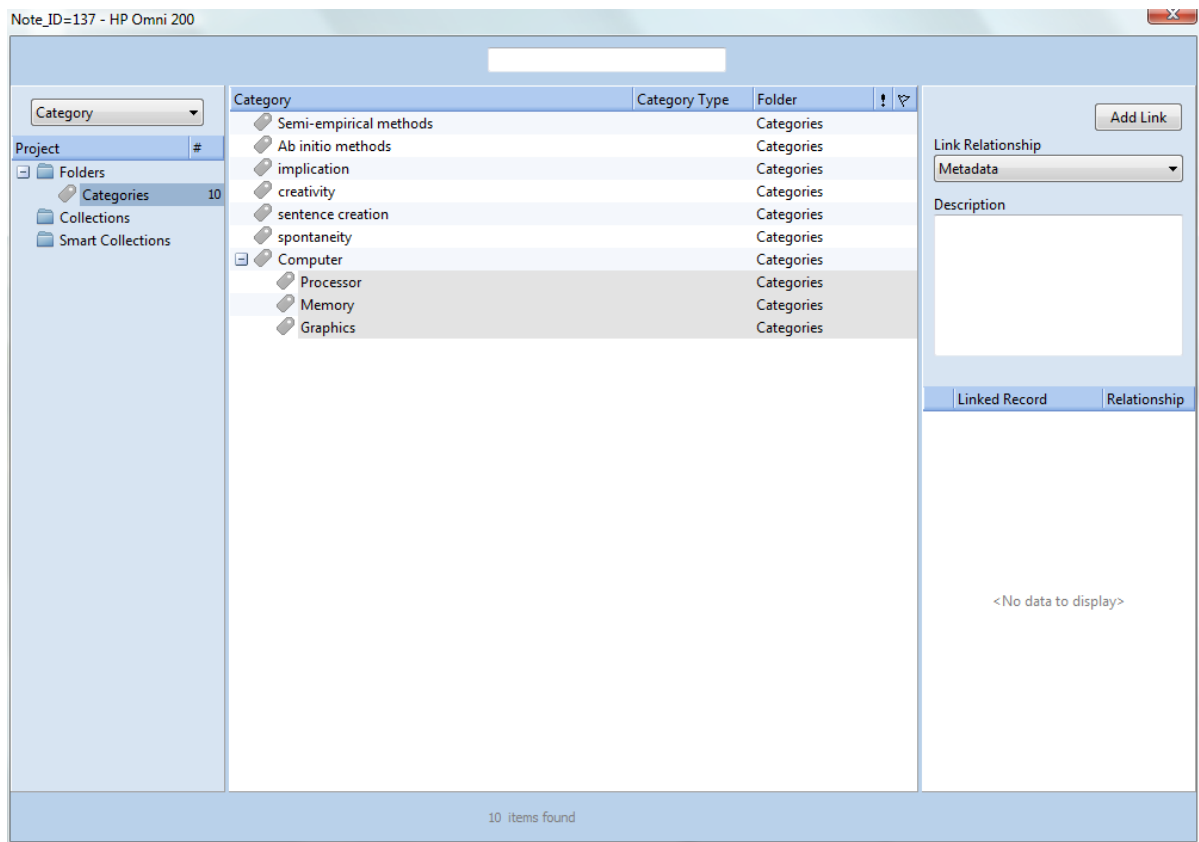
The link window will be closed once the links are added. On the note window record pane, select the "Links" as the active tab. You can see all the added metadata properties. Select a cell under the "Description" column and enter the metadata value.

Planning tasks

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

Part

VIII

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.
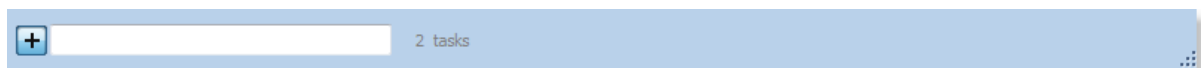
8.1   Create a task

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 clicking the "Retrieve All" button in the Quick Access bar or pressing Ctrl+R.
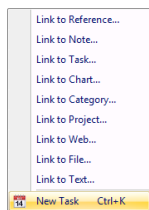
Create a task
   1. Click the "New Task" button under the "Tasks" Ribbon tab.
   2. Enter the task title at the top. Enter other data if needed, like "Start Date", "Due Date", etc.

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.

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 click the "Link" drop down button and select "New Task" or press Ctrl+K. Biblioscape will create a new task in last opened tasks folder. A hyperlink to the reference or note will be added into the Description field of the new task.

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 Biblioscape users are mainly researchers, GTD is implemented in Biblioscape 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.
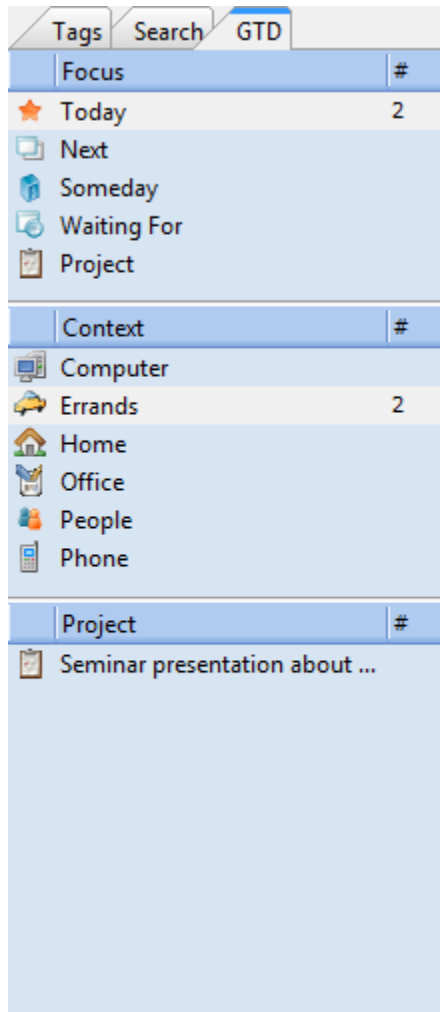
Collect

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 Biblioscape, 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 Biblioscape references or notes into a tasks folder to create a new task.
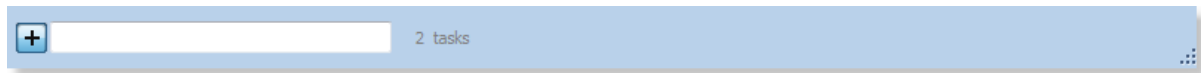
Process

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 TuboTax 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 it is part of a project, drag it to a project. If you can delegate the task to someone else, do it and drag the task into the "Waiting" item under "Focus". For all the other actionable things, put them into the "Next" basket and set a date if necessary. 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" item. If it is an idea that can be used as a reference in the future, drag drop it into a notes folder. The task record will be removed from the task folder and added as a note into the notes folder.

Organize

Tags	Search	GTD

Focus	#
⭐ Today	2
🗔 Next	
📦 Someday	
🔄 Waiting For	
📋 Project	

Context	#
🖥 Computer	
🚗 Errands	2
🏠 Home	
📋 Office	
👥 People	
📱 Phone	

Project	#
📋 Seminar presentation about ...	

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 focus and context.

- 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)

- Context: Context describes locations, people and tools that is required to complete an action. You do a task at a certain place, with certain people, using certain tools. When you group tasks by context, you can easily find out what else can be done at the same context. A popular list includes Computer, Errands, Home, Office, People, and Phone. Under People, you can list several person you have to deal with regularly.

- Projects: If you need to perform several tasks to accomplish a goal, you can group them under a project. If you decide a task should actually be a project, you can drag drop it to the "Project" item under "Focus". Or you can click the right mouse button under the "Project" section and select "New Project". When you finish all the tasks under a project, you can click the "Complete" button.

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 "Next" basket. To practice GTD correctly, you need to do a weekly review as well. 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" basket 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

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.
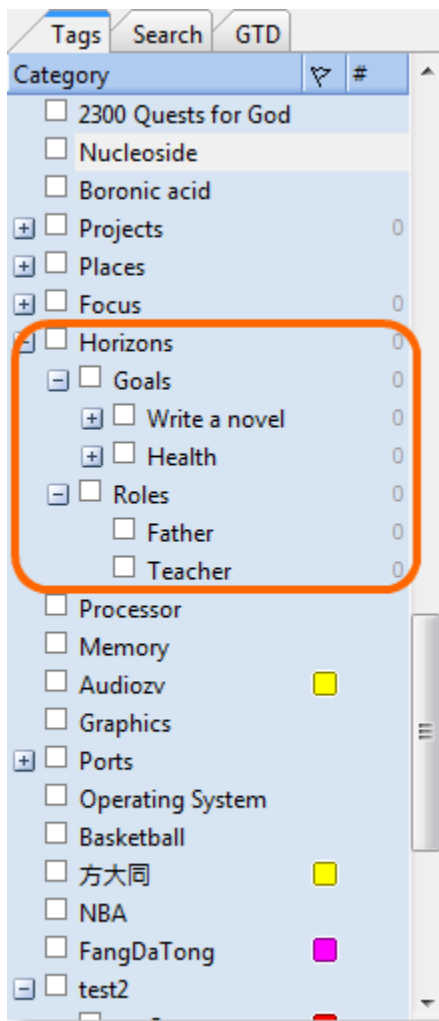
For most people, we only manage tasks at level 5 and 6. It is a bottom-up approach. We can easily get lost in the details and ignore those really important things for the long term. If you want to have a top down vision, you can create a root category "Horizons" under a categories folder. Under "Horizons", 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. To track what you have done to achieve those goals or fulfill the responsibilities of your roles., you can drag and drop your tasks and projects into these categories. 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

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 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 wether 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

So far we have introduced 3 top level ways 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 several names under "People". 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. In Biblioscape, ordering tasks is very easy. Just drag the selected record and move the cursor above the target task icon. The cursor will be changed to blue top or down arrow depends on your cursor position. After releasing the mouse button, the selected record will be moved above or below the target.

Charting ideas

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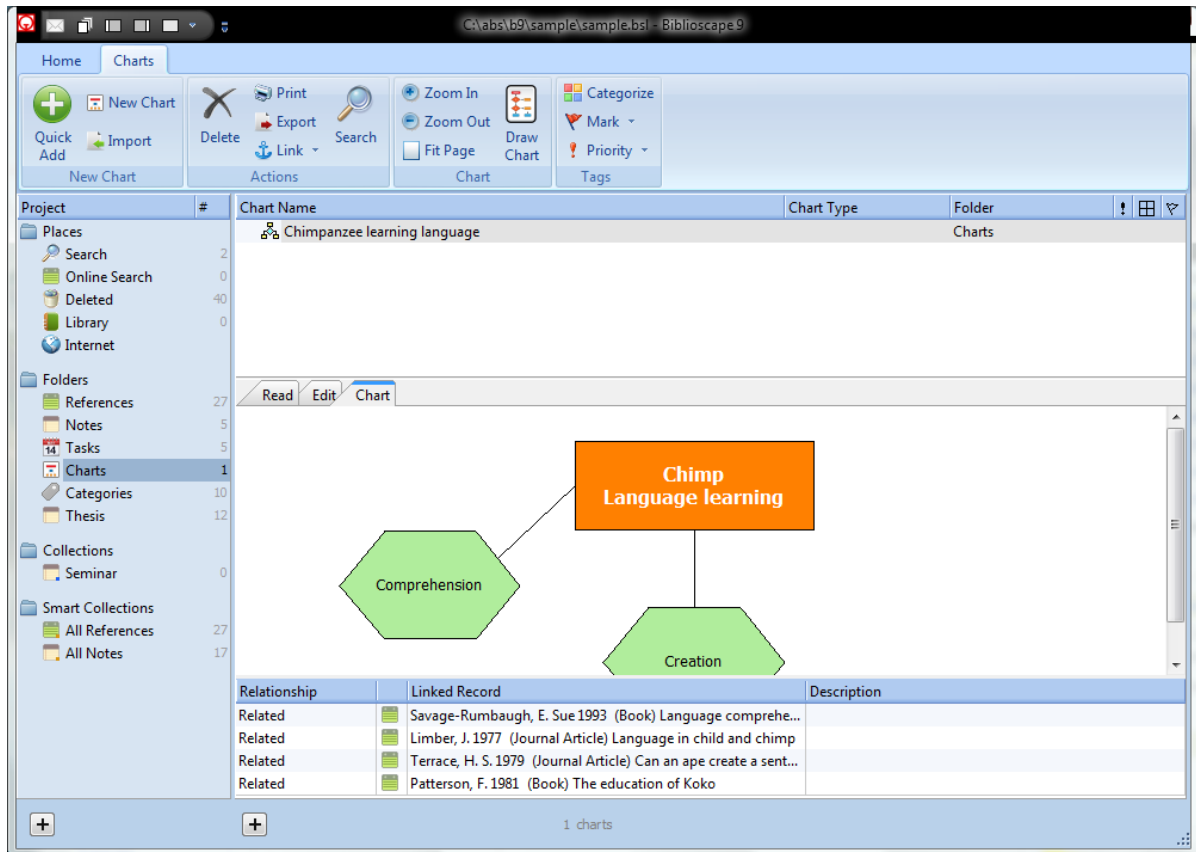but starved for knowledge."
~~ John Nesbitt

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 a chart

To create a new chart, first click the "Quick Add" button. Enter a chart title and press the Enter key. Next, click the "Draw Chart" button. This will open the chart editor window.
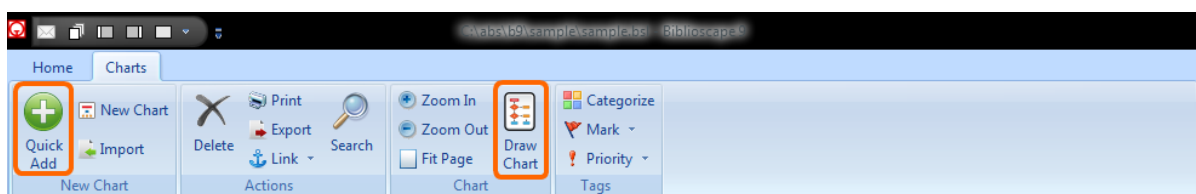
The chart editor is a simple flow chart editor. To create an object, click the first button under the group "Create" on the left. On the canvas, hold down the left mouse button and drag. When you release the left mouse button, an object will be created. Once an object is created, double click it will bring up the properties window. You can then change an object's size,

shape, text, color, etc. To connect two objects, click the second button under the "Create" group. Click on the first object, hold down the mouse button, drag to the second object and release the mouse button. Once the connector is created, you can double click it to change the arrow style, size, and add text. After finished drawing, click the "OK" button to save changes and close the window.
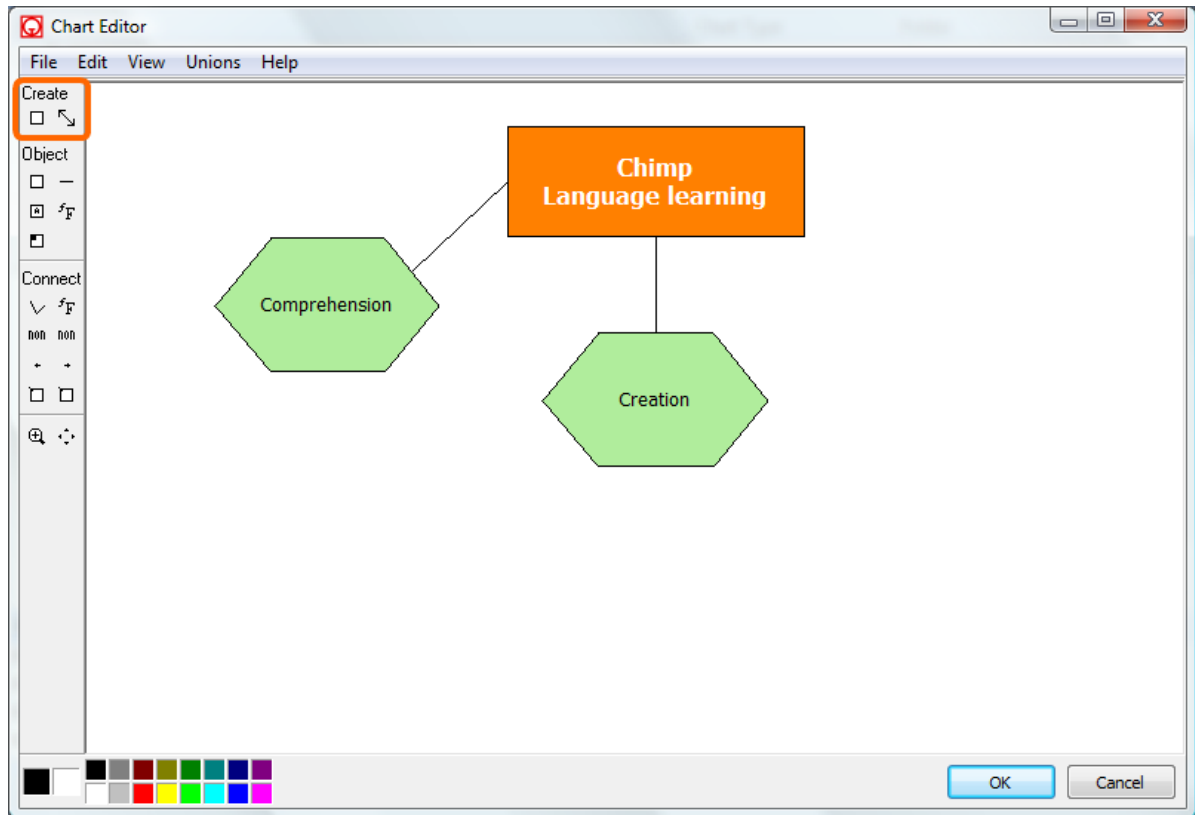
9.2   Link to records from other modules

The purpose of creating a chart inside Biblioscape is to link chart objects to other records stored in a Biblioscape database including references, notes, tasks, and categories. Let's link the chart object "Comprehension" to a reference as an example. Under the "Chart" tab, select a chart object first. Click the "Link" drop down button and select "Link to Reference...". Select the reference you want to link to and click the "Add Link" button. The next time you click on the object "Comprehension", the linked reference will be shown. When no chart object is selected, all the linked records will be displayed.
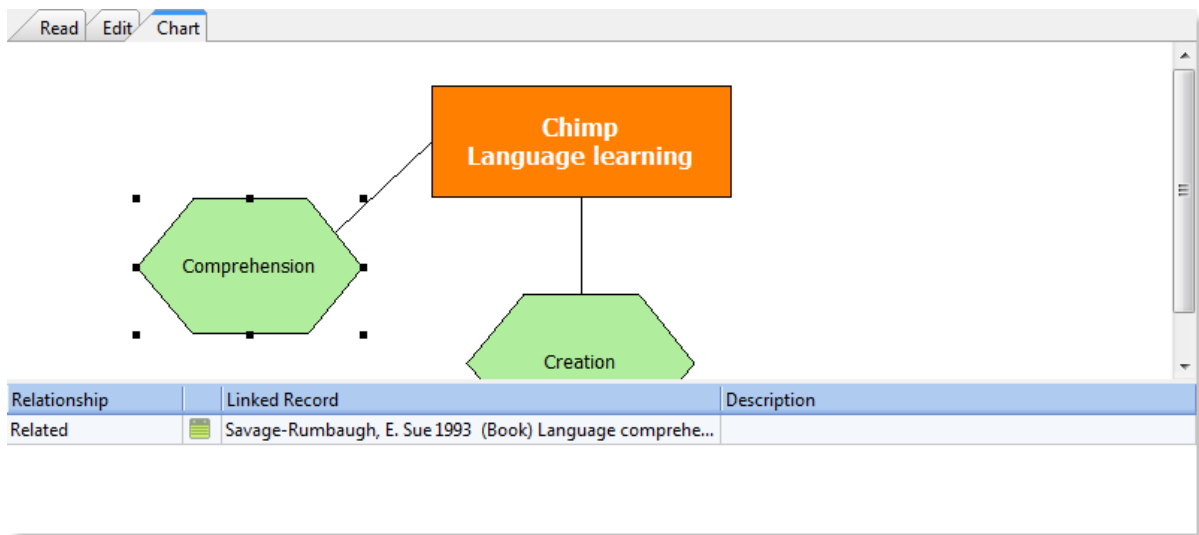
9.3 Chart editor

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
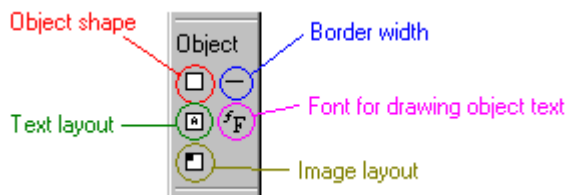
Use buttons from this section to customize object formatting.
- To change object shape, use the "Shape Style" button.
- To change the border width of an object, first select the object, then use the "Shape Line Width" button.
- Use the "Text Font" button to change the font of object text.
- Use the "Text 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
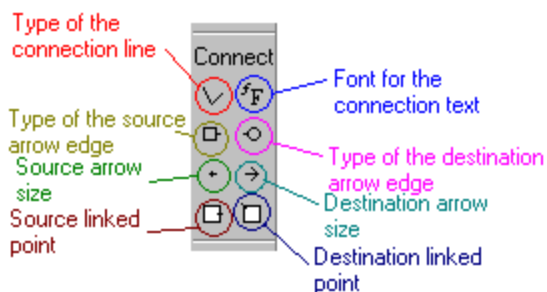
Use the buttons in this section to customize the look of a selected connection.

- 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:
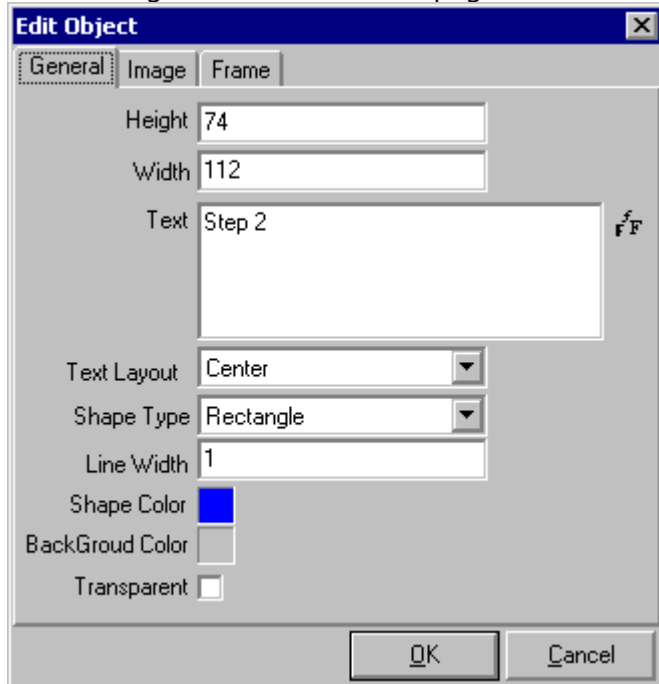
General Page

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

Linking records

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

Part

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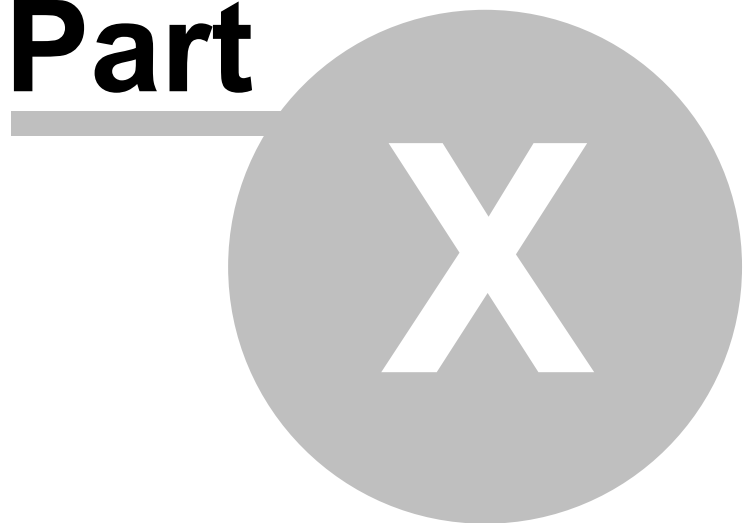
10 Linking records

Besides helping users to collect and manage references, notes, etc. Biblioscape can also help users to build a knowledge base. Linking is an essential part of building a useful knowledge base. In Biblioscape a record can be linked to other records from all five modules with ease. In each module, the "Link" drop down button is available under the "Actions" Ribbon group. On the record pane, there is a "Links" tab to display all linked records. Double click a linked record will open it in a separate window. In addition to record level linking, Biblioscape allows user to link selected text in the notes module to other records, as well as chart objects in the charts module to other records.

10.1   Link relationship

There are many kinds of useful links. For example, when you link two references that gives contradictory results. You can link one note to another as supplementary materials. When creating a link in Biblioscape, you can specify the link relationship. New link relationship can be added. You can customize link relationship items by opening the "...\Biblioscape x\global\link_relationship.txt" file. The forward relationship is on the left of "=" sign, the backward relationship is on the right. When you add a link between two records, a backward link is added automatically. Besides assign a relationship when creating a link, you can also add a short description about the link. This is optional.

10.2   Link as metadata

Another use of the link feature is to assign meta to a record. You can create several categories as meta data properties and link them to a record. In the "Link" tab of the record view, you can add values to the meta data fields. In the following example, a note is linked to 3 categories: Graphics, Memory, and Processor. In the linking step, "Metadata" is selected as Link Relationship. After the linking step, user can go to the "Links" tab of the record pane and enter the values for each metadata property. The same set of categories can be linked to multiple notes as metadata.

Managing a research library

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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   Catalog

The Catalog module uses the same records in the Reference database. You first create a book under a references folder. Then drag and drop it to a "Library" icon under "Places". A catalog item will be created and marked as "Available". You can add a second copy later in the library module if needed.
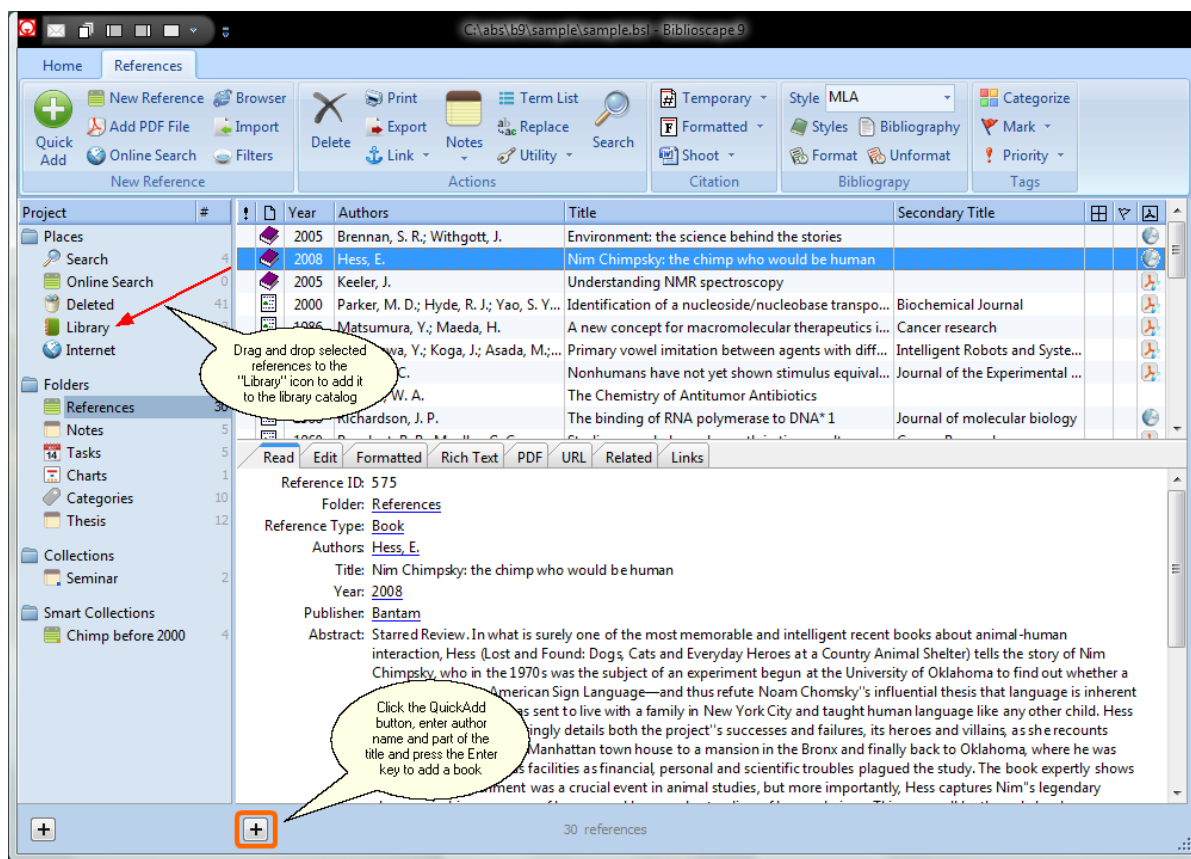
Create a catalog item

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. When you drag a reference into the Library icon, a catalog item is created automatically. If you purchase another copy of the same book, you need to add a second catalog item. First, click the "Catalog Item" button. A new item will be added and numbered. Next, select a Status using the combo box.
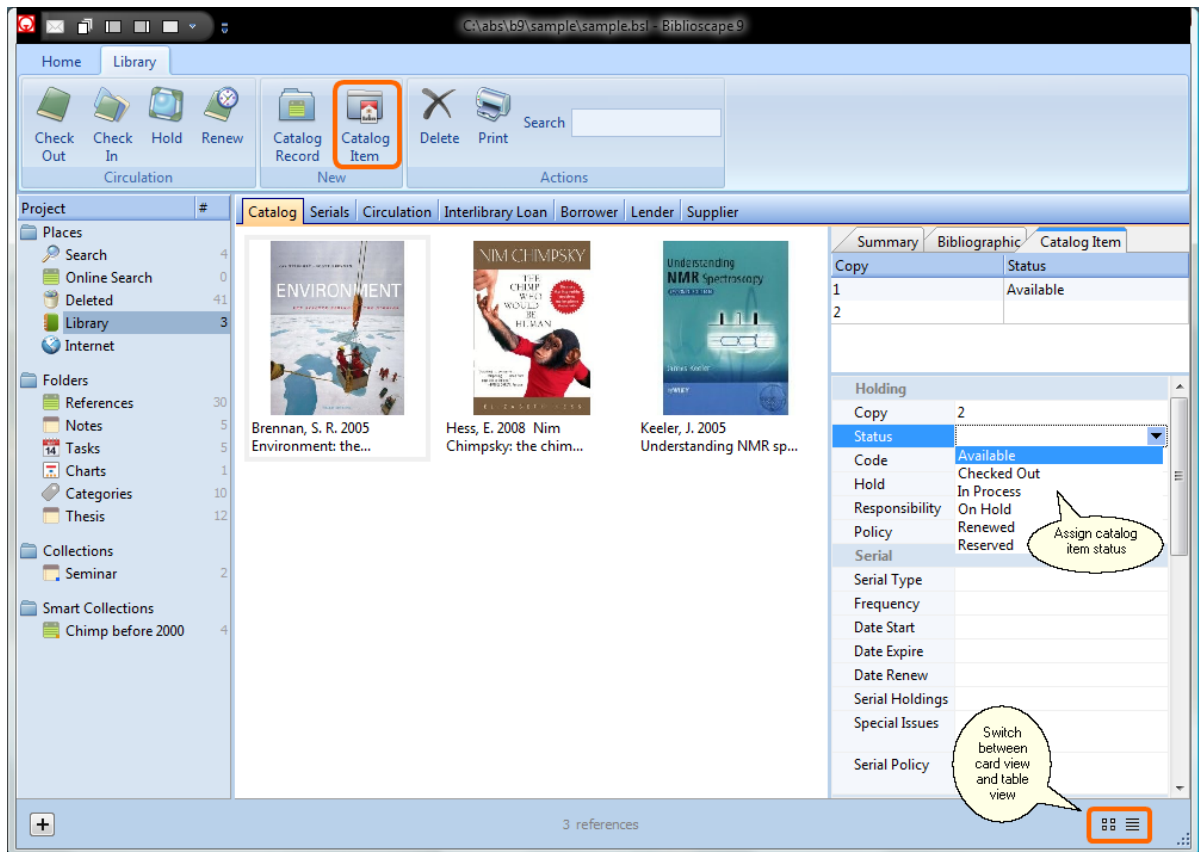
Card view and table view

In the catalog sub-module, you can display records in the card view or table view. In the card view, you can paste an image to the graphic field of a card. If you find a image in a web browser, click the right mouse button and select "Copy". Go to the card view graphic field and press Ctrl+V to paste it. The image size will be adjusted when you browse to another record.

Import records to catalog

Unlike the References module, the Catalog module does not have import features. But, you can transfer records from the References module to the Catalog module by drag and drop. You should go to a references folder and import your references and drag drop them into the Library icon.

Circulation

The circulation module handles check-in, check-out, renew, hold, etc. All these activities are logged and can be searched, grouped, and analyzed. To view the circulation history, please go to the "Circulation" tab. All the circulation activities are handled under the "Catalog" tab.

Check Out: First select the book you want to check out. Click the "Check Out" button. Select a borrower and click the "Check Out" button. If the borrower's name is not in the list, go to the Borrowers sub-module and add a borrower first. If there are any comments about this transaction, add it to the Notes box.

Check In: Select the book you want to check in. Run a search if needed. Click the "Check In" button. Make sure the information listed are correct and click the "Check In" button.

Renew: To renew a checked out book, select the book first and click the "Renew" button. Make sure the information listed are correct and click the "Renew" button.

Hold: To put a hold on the checked out book, select the book first and click the "Hold" button.

11.2 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 a serial

First, click the "Serial" tab. Then click the "Serial Record" button under the "New" Ribbon group. In the reference editor, a new "Serial" type record is created. You only need to enter a title. Close the reference editor. The newly added serial record will be shown in the library module.

Create an issue

To add a serial issue, click the "Serial Issue" button under the "New" Ribbon group. Enter the volume, issue. Change the issue status if necessary. Click the "+" button before "Detail", you can enter detailed information about a serial issue including: Date Published, Date Received, Notes, Date Routing, Copy Management, and Routing List. You can also enter a table of contends of a issue under the section "Table of Contents".
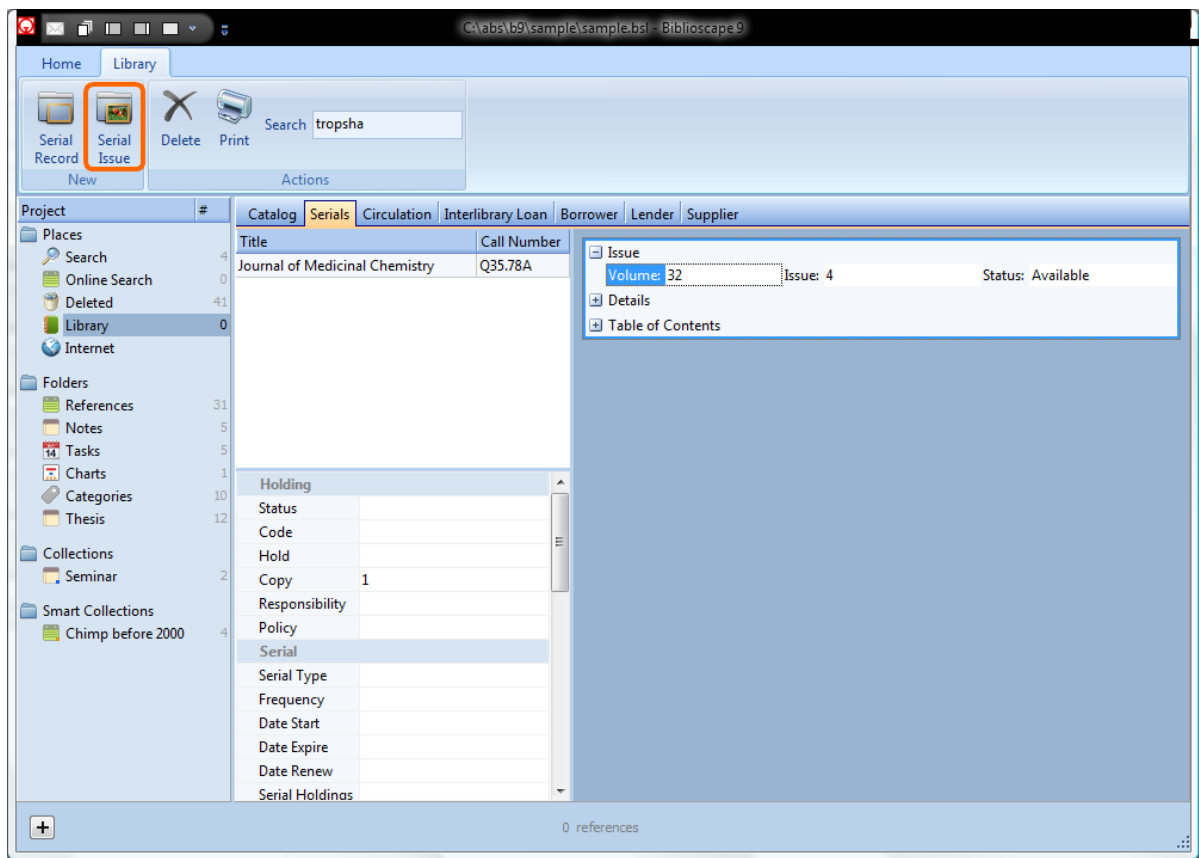
11.3 Circulation

All the circulation activities are recorded in a log. You can review the history by going to the "Circulation" tab. You can search the circulation history by enter borrower name, book author, title, etc. All the circulation activities are handled under the "Catalog" tab. These include Check In, Check Out, Hold, and Renew.
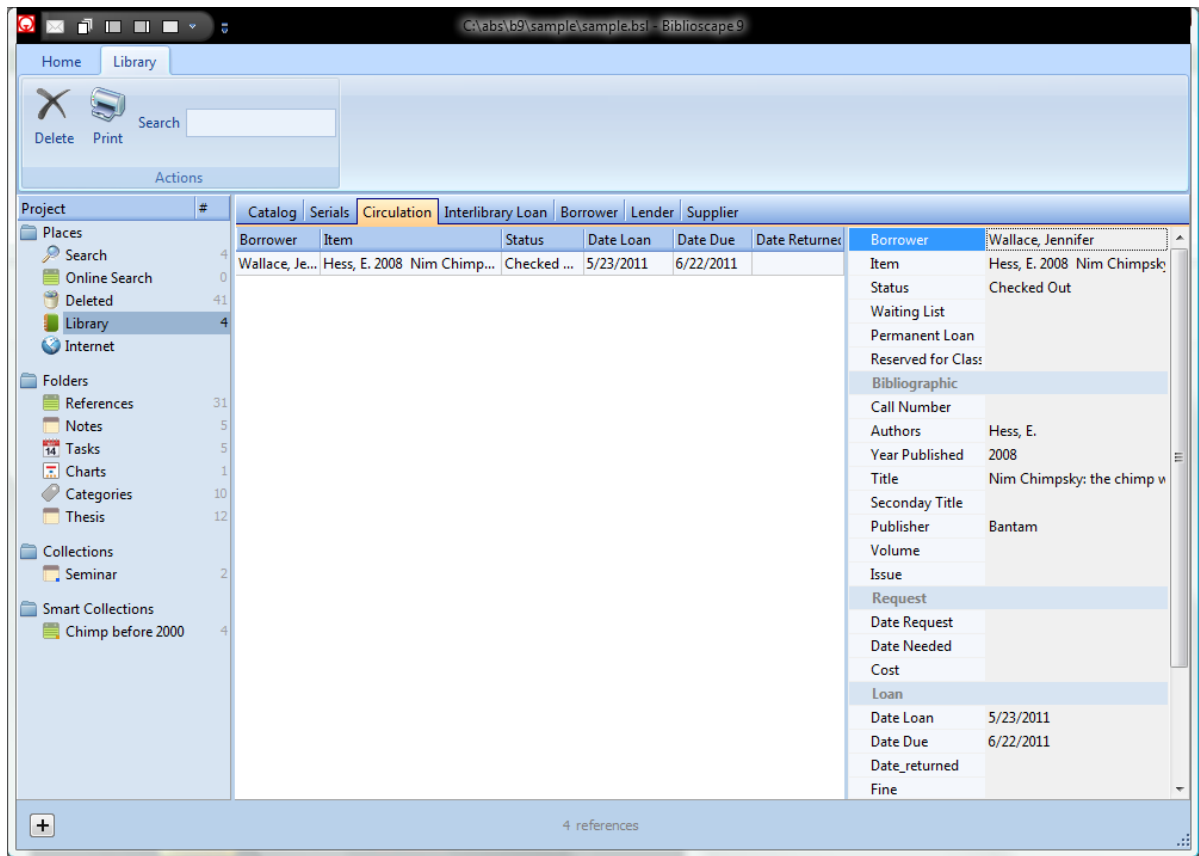
11.4   Interlibrary loan

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. To create an Interlibrary loan request, click the "Interlibrary Loan" button. Select a Lender using the drop down box. Next, select the borrower who requested the loan. Enter the bibliographic data of the requested item. Enter the "Date Requested" and "Date Needed". Once the loan is received and returned, enter the related data accordingly.

11.5   Borrowers

Borrower	Wallace, Jennifer
Photo	
Department	Chemistry
Contact	
Phone	384-349-0942
Fax	384-394-9923
Email	mailto:jwallace@upen.com
Address	
Street	43 Baker Street
City	Carrboro
State	NC
Zip	29383
Stamps	
Created	5/23/2011
Modified	20110523
Others	
Privilege	
Notes	

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. To create a new borrower, click the "Borrower" button under the "New" Ribbon group. Enter the contact information accordingly. You can paste a borrower photo into the Photo field by pressing Ctrl+V after copying it from another place.

11.6 Lenders

Lender	UNC Health Science Library
Lender Code	802560
Contact	
Name	Bowen, Sarah
Phone	293-292-2332
Fax	293-949-9984
Email	mailto:sbowen@unch.edu
Address	
Street	93 Mason Farm Road
City	Chapel Hill
State	NC
Zip	29833
Stamps	
Created	
Modified	
Others	
Notes	http://www.hsl.unc.edu/

The lenders module includes the names of libraries that lend materials to you through Interlibrary Loan. To create a new lender, click the "Lender" button under the "New" Ribbon group. Enter the contact information.

11.7   Suppliers

Supplier	Louis Goldberg Books
Contact	
Name	Smith, John
Phone	398-293-0233
Fax	398-230-2231
Email	mailto:johnsmith@goldberg.com
Address	
Street	90 Walnut Street
City	Durhum
State	NC
Zip	29839
Stamps	
Created	
Modified	
Others	
Notes	http://www.goldberg.com

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. To create a new supplier, click the "Supplier" button under the "New" Ribbon group. Enter the contact information.

Publishing on the Web

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

Part

XII
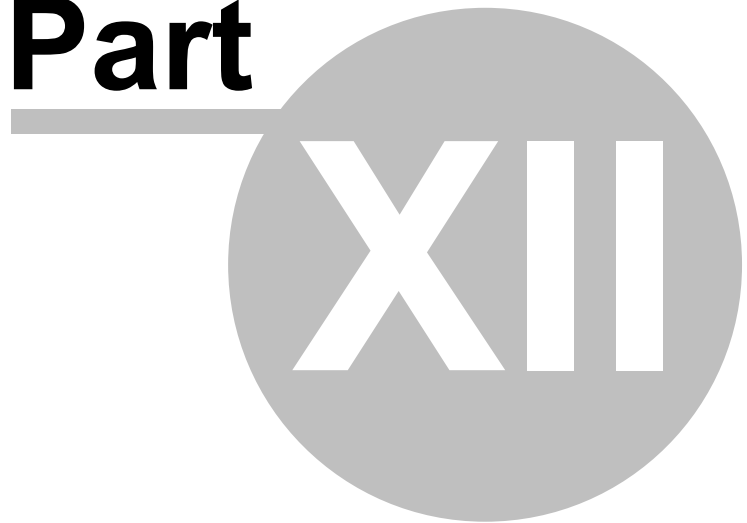
12   Publishing on the Web

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:
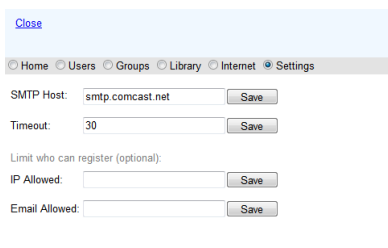
- Fast performance, because the database connection is now persistent. The new BiblioWeb.exe can support a large number of concurrent web users without big performance loss.

- 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 third party 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 running Windows.

- PC has to be on the Internet or Intranet.

- Biblioscape has to be installed.

12.1   Setting up BiblioWeb server

To run BiblioWeb, double click the file "BiblioWeb.exe" under the "...\Biblioscape x\BiblioWeb\" folder. When you run BiblioWeb for the first time, the file "BiblioWeb.ini" will be created. Press F9 to launch the browser to access the last opened database. The first user logging into BiblioWeb will be assigned the "admin" privilege. After logging into BiblioWeb,

click the "Admin" hyperlink. At the top, click the "Settings" radio button. You need to enter the "SMTP Host" and click the "Save" button. SMTP host is needed to send emails to new users. You need to enter this for email programs as well. For example, if you use Microsoft Outlook, go to the email account setting, you will find the SMTP host listed as "Outgoing mail server (SMTP)". Below SMTP host, enter the Timeout period in minutes. If a logged on user become inactive for a certain number of minutes, BiblioWeb will log out the user automatically. The admin user can also control who can register as a new user by setting "IP Allowed" and "Email Allowed". If the admin want to limit the access to users from a certain university campus, the university IP domain can be used. For example, if you put "152.2." in there, users can only register when running a web browser from UNC Chapel Hill campus computers. If you want to add another IP domain, separate them by "; ". For example: "152.2.; 128.192." will only allow UNC Chapel Hill and UGA Athens campus users to register as new user. Once a new user is registered, the user can login from any computer. The "Email Allowed" works the same way. If you only allow users with a certain company email to register, you can enter your company email domain there. For example, if you put "@jnj.com" into "Email Allowed" box, only users with "Johnson and Johnson" email address can register. To enter multiple email domains, separate them by "; ".

In the settings tab, you have to enter the SMTP Host. Without it, new users cannot register. BiblioWeb will use "30" as the default timeout period. The "IP Allowed" and "Email Allowed" settings can be left as blank if you don't need to restrict new user registration. Here is a sample of the "BiblioWeb.ini" file. You can double click this file to open it in NotePad.

database=c:\tutorial\sample\sample.bsl
port=80
timeout=30
smtp=smtp.comcast.net
ip allowed=
email allowed=

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 8888 is used and the IP address of your PC is 209.86.27.129, you should use the following URL

http://209.86.27.129:8888

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. If BiblioWeb uses a port other than 80, 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" and BiblioWeb runs on port 8888, configure the router (this is sometimes called "port forwarding") so that it sends all traffic it receives from the Internet from port 8888 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.

12.2   Running BiblioWeb server as a scheduled task

BiblioWeb can be run as a regular Windows application. To do so, you have to login to Windows first. This becomes inconvenient when you are away from your computer. To make BiblioWeb run when Windows is started, you can set up a Windows scheduled task to run BiblioWeb when Windows starts.

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 wether 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.

12.3   BiblioWeb server license

To satisfy the needs of our customers, the BiblioWeb server is licensed in 2 ways: 30 concurrent users and unlimited users. Biblioscape Professional edition allows BiblioWeb to serve 30 concurrent user sessions. This is an ideal and economic solution for a research group to share a common database on the Web. For large organizations, Biblioscape Librarian edition allows BiblioWeb to server unlimited number of user sessions. The number of users served is only limited by your hardware, network speed, and database size, etc.

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, a configuration file (*.bsr) has to be prepared first. Instead of opening a database on the local computer, user opens a *.bsr 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 then 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 all users have already purchased a copy of Biblioscape. The database server is installed as part of Biblioscape under the folder "BiblioRemote".

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.
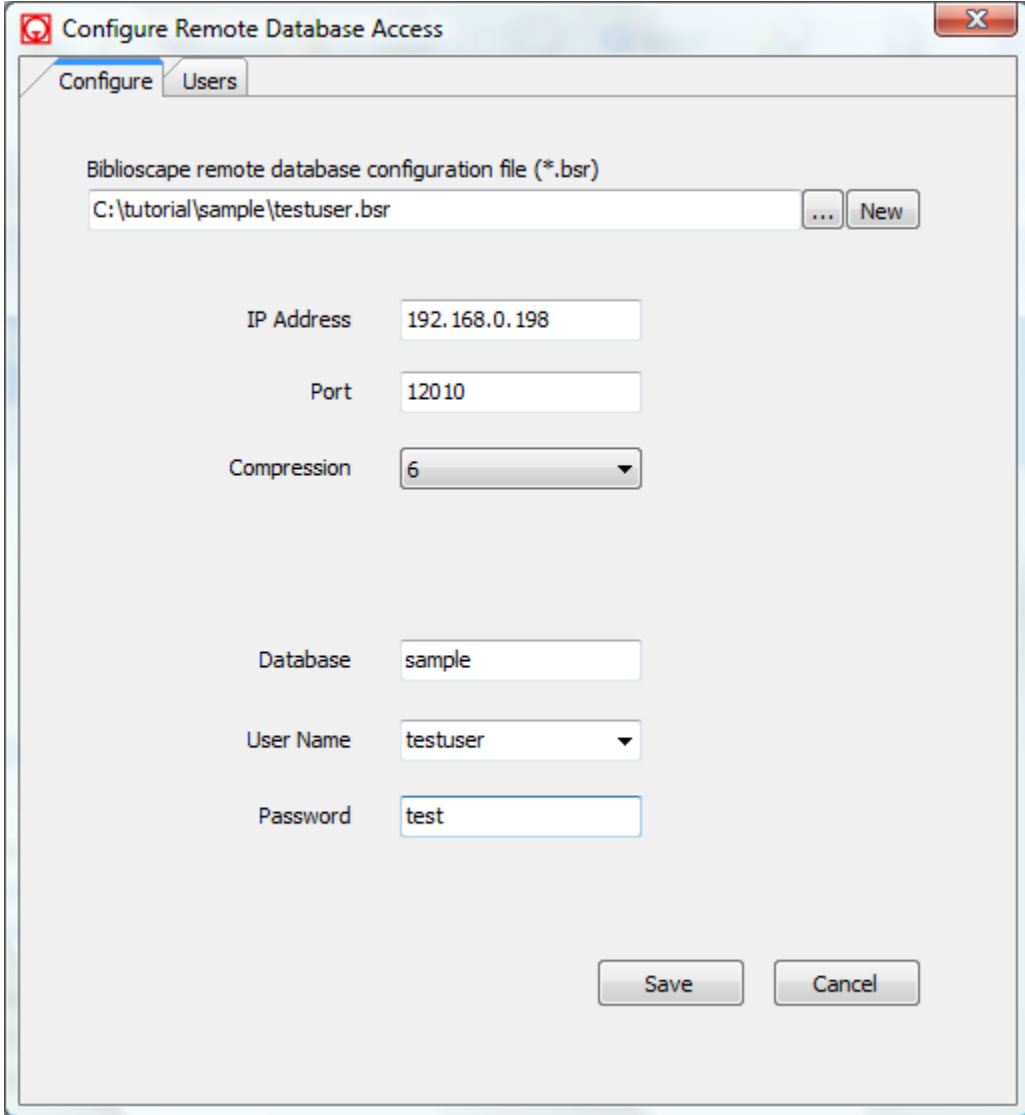
Server setup

To have BiblioRemote access set up correctly, you need to have a PC designated as server which have a permanent IP address. You can set up BiblioRemote server at home as well if you have DSL or cable modem connection. The home computer IP address is assigned by your internet service provider. It rarely changes. In case it changes, you can simply edit the *.bsr connection file to accommodate the change. 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. Both the client PC and server PC must have Biblioscape installed and have Internet or Intranet access. If you have BiblioRemote running on a PC behind a router, you need to customize the router to make sure the traffic on port 12010 is directed to the correct PC.

1. Use file manager to copy the file "edbsrvr.exe" from "C:\Biblioscape 9\BiblioRemote\" folder to the database folder. For example, if you want to share the database "C:\Biblioscape 9\Sample\sample.bsl", copy "edbsrvr.exe" to the "C:\Biblioscape 9\Sample\" folder. Double click "edbsrvr.exe" under the database folder to run the BiblioRemote server.

2. On the server PC, run Biblioscape and click the "Database" button drop down arrow under the "Home" Ribbon tab "Database" group. Select "Configure Remote Database Access...".

3. You will be prompted "Do you want to create a new remote access file (*.bsr)?". Click "Yes" to create one. Select a folder and give the file a name. This is the file that will be given to the client user to open the server database.

4. **IP Address**: Enter the server PC's IP address. If you do not know your computer's IP address. Open your browser and enter the URL: http://whatismyipaddress.com/.
   Port: Enter a port address. The default is 12010. Make sure this port is opened on your server PC and client PC. Opening a port is covered in detail at the end of this section. If your server PC is behind a router, you need to customize the router to direct traffic to the PC where BiblioRemote is running. This is also covered in detail at the end of this section.
   Compression: When your client PC and server PC are on the same LAN, you can set compression to 0 which means no compression. When connecting through the Internet, setting compression to 6 is a good compromise.
   Database: The currently opened database is added automatically.
   User Name: You need to pick a user name from the drop down list. You don't have to create a new user name for each individual user. You can give the same *.bsr file to multiple users. To create a new user name, go to the "Users" tab and click "New". When you create a new user, you will be prompted to enter a password.

Password: When you pick a user, the associated password will fill the Password field automatically.

5. If you need to create a new user name, go to the "Users" tab. Click the "New" button to add a new user and give a password.
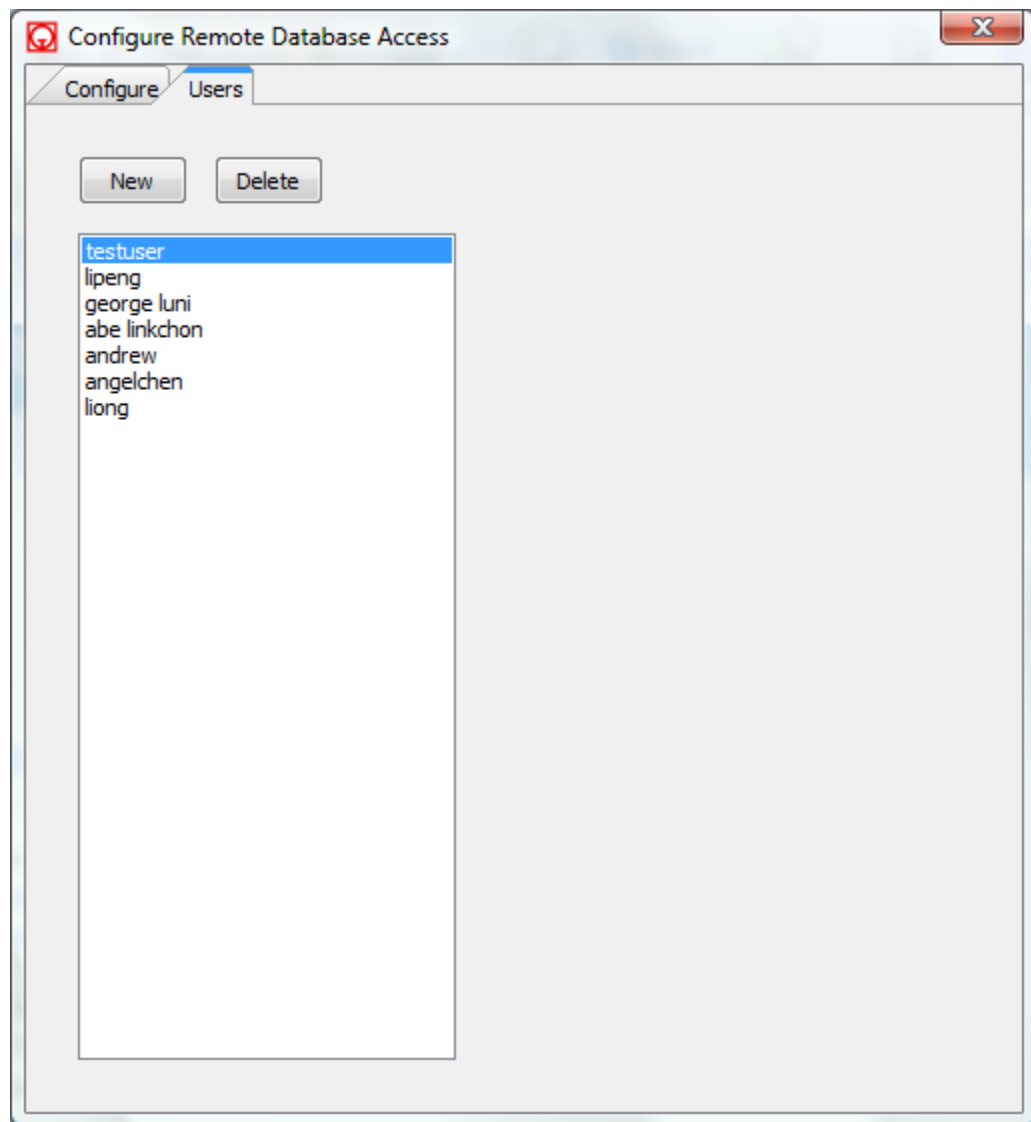
6. On the "Configure" tab, click the "Save" button. You can now give the *.bsr file you just created to a user on the client PC. The user can run Biblioscape and click the "Open" button under the "Home" Ribbon tab "Database" group and select the *.bsr file to access the database on the server. Make sure the port 12010 is open and BiblioRemote server is running. You can run the server by clicking the "Database" button on the server and select "Start BiblioRemote Server".

Client setup

So far we have successfully set up BiblioRemote server; and created 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 click the "Open" button under the "Home"

Ribbon tab "Database" group.

2. Select the configuration file ("*.bsr") that is given to you. This file is created on the server PC as shown above. When a remote database is first opened, Biblioscape will ask you if you want to use the grid mode to boost performance. Select Yes if you have several thousands references under a single folder, otherwise select No. If Biblioscape failed to open the remote database, you need to check the port used (12010) is open on both the server PC and the client PC. Also make sure BiblioRemote server is running on the server PC.

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 12010.

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 port 12010 is not blocked by the router. Also, configure your router to forward traffic on this port 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 1201 to "192.168.0.3".

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, Vista, and 7. To run BiblioRemote server as a Windows service, you need to logon to Windows as System Administrator.

Windows service

To run the BiblioRemote server as a Windows service, go to "Start | Run...". On Windows Vista and 7, go to "Start | All Programs | Accessories | Run". Click the "Browse" button to find "edbsrvr.exe" under "...\Biblioscape 9\BiblioRemote\" folder. 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 "ElevateDB Server"; 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.

Windows task

Under Windows Vista and 7, you have the option to setup a scheduled task instead of running BiblioRemote server as a Windows service. You only need to do one of the two. 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 "edbsrvr.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 wether 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.

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".
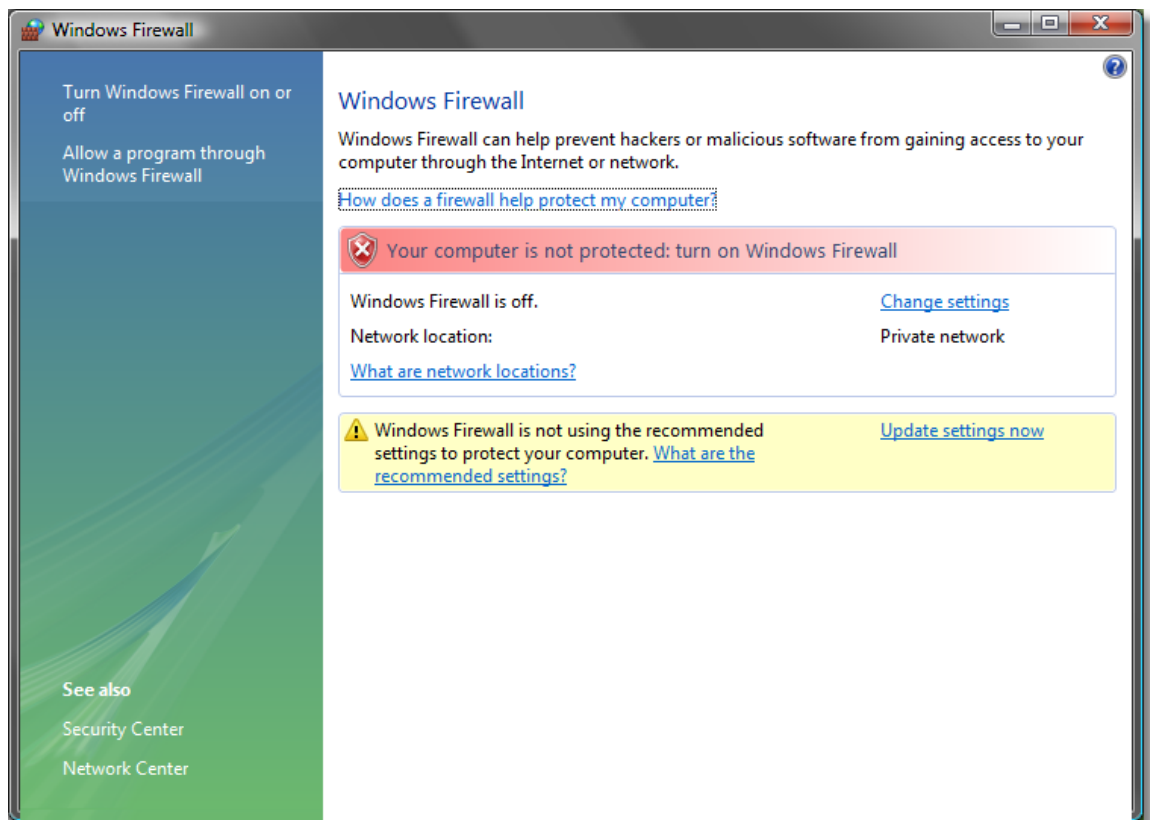
2. On the left pane, click the hyperlink "Allow a program through Windows Firewall".
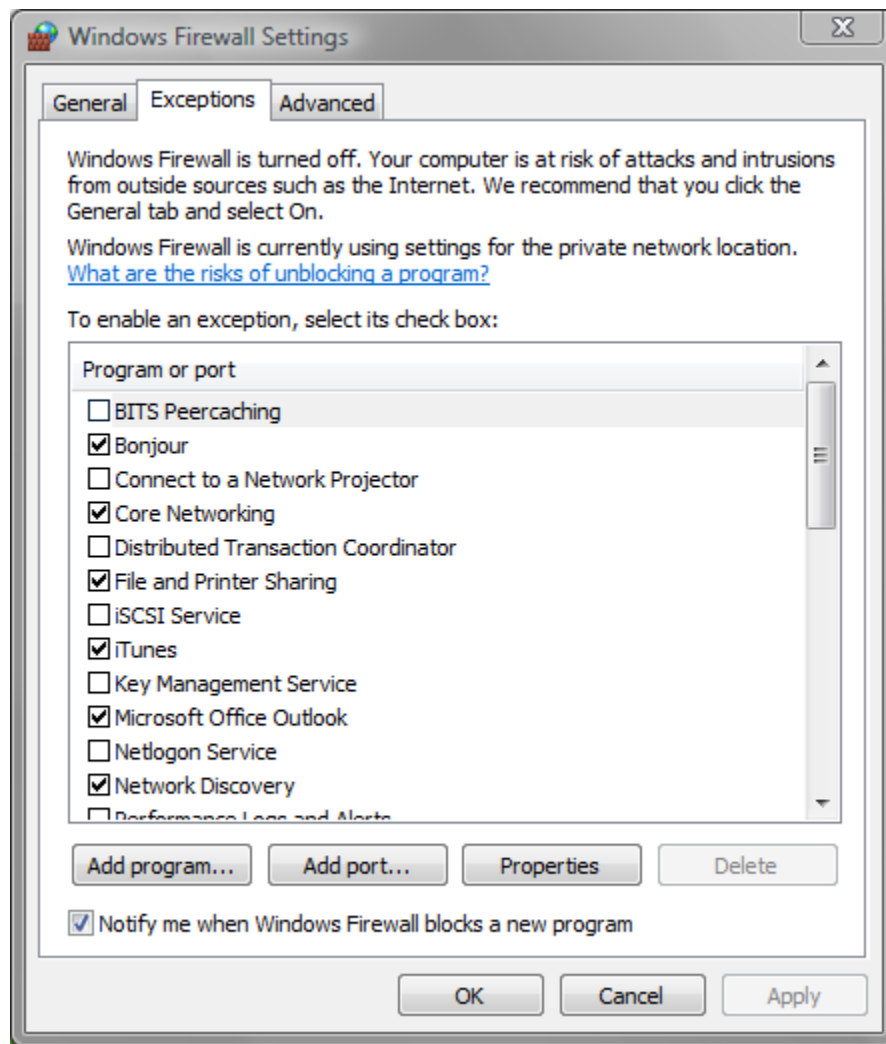
3. BiblioWeb uses port 80 by default. This port is open in all systems. If you use a port other than 80 in BiblioWeb. You need to open that port. Click the "Add port..." button. Enter a name like "biblioweb" and the port number. Chose TCP as the protocol and click the OK button. Or, instead, you can click the "Add program..." button and enter the full path to BiblioWeb.exe and click the OK button.

4. BiblioRemote uses port 12010 by default. Click the "Add port..." button. Enter a name such as "biblioremote data" and port number "12010". 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\edbsrvr.exe" and click the OK button.
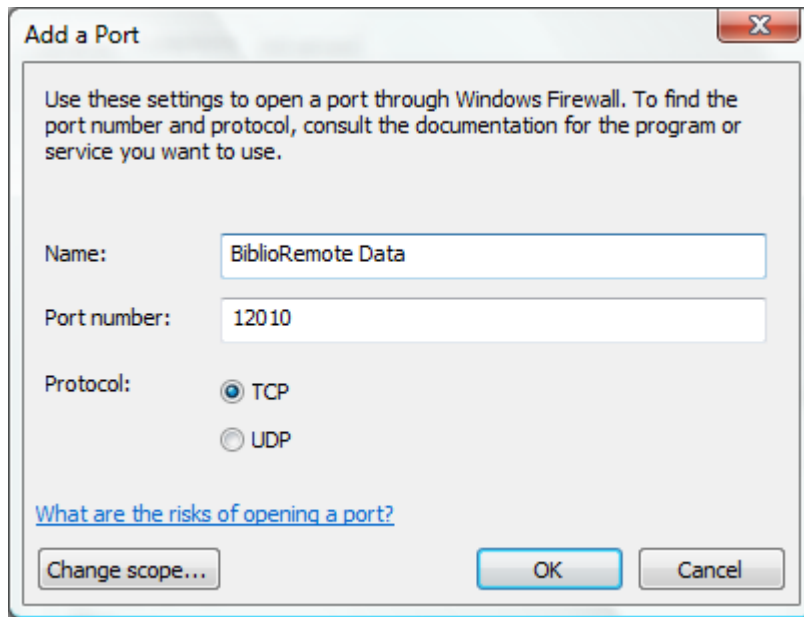
13.4 ODBC driver

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 database 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

This product can be used with Visual Studio 2005, 2008, and 2010 (.NET Data Provider) and

any application or development environment that can use ODBC for data access.

How to Get it

You can purchase the ODBC driver for $69. Click here to purchase it online. A separate help file is included in ODBC installation.

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