Research Information Management with Biblioscape

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Preface

Not many of us have the patience to read a book before we start playing with our new software. With that in mind, this book is organized by function, and at the beginning of each section (and some chapters) there will be a page or two about getting started in that function.

Bibliographic software has been available for over ten years, but has been used largely by people writing scientific research papers and books. It's been a little like a "best kept secret" in that respect, because this is the kind of software that can be valuable to anyone who is writing fiction, history or college research papers and conducting research of any kind. Biblioscape offers two functions that are common to all the variations of bibliographic software. Those are:

A place to store bibliographic information.

A way to enter that information into whatever you are writing in your word processor, whether that is a paper, an article or a book.

As computers have become more powerful and software has become more sophisticated, more functions have been added. It is now easy to sort and search through your database(s) to find the information you have stored. It is also possible to search for and import bibliographic information from libraries and databases around the world. Biblioscape is somewhat unique in that it offers all of these functions and a several more. Following are the major functions offered by Biblioscape, but within each function you will find a number of very powerful features.

Entering your research information into Biblioscape

Searching libraries and databases worldwide for bibliographic and research information

Organizing your information so you can find what you want when you need it

Adding citations, notes, and bibliographies to your paper, article or book

Organizing your books, journals and other publications into a library

Publishing your bibliographies on the Internet with the BiblioWeb server software (Included with the “Pro” and “Librarian” editions)

As mentioned earlier, each of the “Function” sections will have a “***QuickStart”*** page at the beginning of the section or in the individual chapters. This will allow you to get right into this software and use it. As you get acquainted with Biblioscape, you'll have questions that this book can answer, but if the question gets technical, check with “Help”. This is not a technical book, but is written to help you get the maximum benefit from your Biblioscape software. The software is very easy to work with and surprisingly flexible. It is designed to let you build enormous databases and still be able to search them quickly. Many of the functions, large and small, can be reconfigured to work in a manner that is most convenient for you.

Now, just a few more words about using this book. There will be a lot of cases where you will need to be led into a procedure with keystrokes. Here's the code.

Click “File | Database | Open Database” is probably pretty obvious. It means:

1-Move the mouse pointer to the upper left-hand corner of the screen and click on **File**.

2-When the File menu opens (drops down), click on **Database**.

3-When the Database menu opens (drops down), click on **Open Database**.

This little bit of shorthand will save you some reading, and make this book a lot simpler. In most cases you'll find that toolbars, menus and buttons work in the same manner as your operating system or your browser.

There's a glossary at the end of the book, but a few terms here might be helpful.

Database- A large file where you store your references. You can put all your information into one database (Biblioscape can handle 10,000 references in one database easily) or you can have separate databases for large categories. If for one project you are collecting information about Robotics, but elsewhere are doing research on palm trees it would be logical to have separate databases. Biblioscape can accommodate as many databases as you wish to have.

Reference- The information you have from one source. Examples could be a journal, magazine, book, interview, television program or wide variety of other possibilities.

Folder- A subdivision of a database. You can have many folders in one database and you can have one reference in many folders. References can be moved into folders, and they are always available in that folder. There is also a Dynamic folder available (Blue Folder) that will search your database and add any references that meet the criteria you set for the folder. Once you have established a Blue Folder, any new references added to your database that fit the criteria will be added to that folder.

Keywords- Words that will help you identify or categorize a reference and will help you find that reference when you need it. Biblioscape has a very capable system for searching by keywords.

Format- In the context of Biblioscape, Format refers to the act of converting temporary citation "tags" in your document to actual citations in the documentation style (MLA, APA, Chicago, etc.) of your choice. The ability to move between temporary tags and formatted citations allows you to print out your document and references in one style, then print the same document in a different style.

Index- Biblioscape indexes everything that you enter, including full text articles. This is important to you when you need to find an important piece of information which you have entered, as one of the many search, sort or lookup tools in Biblioscape will be able to find it.

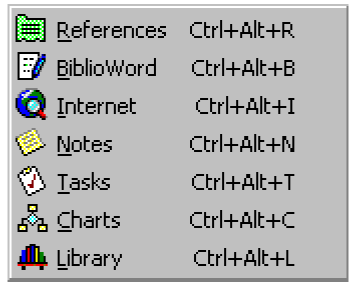
Style (Output style)- Hundreds of documentation styles are available in Biblioscape, some very general and widely used (MLA, Chicago, APA are examples) and others specific to a single publication (American Journal of Pathology, for example, and many more).

Two additional interesting features found in Biblioscape --

Although it's always a good idea to save your work, Biblioscape saves nearly everything. You are very unlikely to lose any work unless you press the cancel key.

Each time you re-open Biblioscape, it opens in the same screen where you last closed.

From anywhere in Biblioscape, you can go to another module by clicking **Go** on the menu bar, which opens a dropdown menu. Click on any module, and Biblioscape will take you there.



For technical questions that this book does not address, send an e-mail to support@biblioscape.com, or go to www.biblioscape.com. (See the Help chapter)

What else would you like to see in this book? For questions, comments or suggestions about this book, send an e-mail to: vwheewright@yahoo.com.

Enjoy your experiences with this book and with Biblioscape!

Verne Wheelwright

Installing Biblioscape

Biblioscape is unique in a number of ways, but one of the first things you'll notice is that it is available only as a download from the Biblioscape site at www.biblioscape.com. Prospective users are invited to download Biblioscape for a “test drive”.
The steps to download the software are simple:

1 -- Go to www.biblioscape.com.

2 -- In the upper right-hand corner of the web page you will see a button labeled “**Download**”. Click on it.

3 -- Follow the instructions for downloading. The default destination in your computer is on the “desktop”, which is a good location. When the download is complete, you will have an icon on your desktop representing a self-executable “zipped” copy of the software.

4 -- Double click on the downloaded Biblioscape icon and follow the steps to install Biblioscape in your computer. The default location is “C: \Program Files\Biblioscape”. Unless you have a reason to put it elsewhere, this is a good location.

5 -- When the installation program closes, a box with several Biblioscape icons in it should remain on your screen. Place your mouse pointer on the red **Biblioscape.exe** icon. When it turns blue, click on **File | Create Shortcut,** then drag the new icon onto your desktop.

6 -- Now, highlight the **BiblioSidekick** icon, click on **File | Create Shortcut** and drag the new icon onto your

desktop. You'll learn about using this utility in Chapter 13.

Registering Biblioscape

After downloading and learning to use Biblioscape, if you decide to purchase the software, simply ***leave the downloaded version in place,*** and follow these few steps:

1 -- In Biblioscape, go to **Help | About Biblioscape**.

2 -- Write down the machine ID number that is shown there.

3 -- Go to the Biblioscape Web site at www.biblioscape.com.

4 -- Click "Order" on the top right corner and follow the procedures. You will be asked for your machine ID.

5 -- After you have arranged payment, Biblioscape will assign you a serial number.

6 – Back in your computer, in Biblioscape, go to **Help | Register Biblioscape** and enter your serial number.

Be sure to record your serial number somewhere besides in your computer. If, sometime in the future, your hard drive crashes, you can simply download Biblioscape again to your new hard drive and register it with the same serial number.

Updating Biblioscape

You will probably find it worthwhile to visit www.biblioscape.com from time to time. There is a newsletter there as well as information on any updates, fixes or additions to the software. You'll find more details in the Help Page chapter section titled "Biblioscape on the Web".

Biblioscape version 5.0 includes some important and powerful changes, although they are mostly invisible. These improvements are primarily for added reliability and multi-user support. If you are upgrading from Biblioscape 4 to Biblioscape 5, it is important that you create a new version of your database(s) *before you delete Biblioscape 4.* You can download a file (http://www.biblioexpress.com/bdetran.zip) from the Biblioscape web site that will copy and convert your database(s) for use with Biblioscape 5.

Section I: Entering information into your research information manager

This section will introduce you to most of the ways you can enter research information into Biblioscape. The first step is entering references, or bibliographic information from materials you've read that you may use to document your research. Next you will work with notes which are not related to a specific reference, but which may be your observations or calculations for your research or anything you want to make a note about.

You will then learn how to import bibliographic information you have already stored in other software programs, how to use the Charts module to add illustrations or sketches to your work and finally how to access libraries and databases around the world. From those libraries and databases, you will import references with abstracts and even full text articles into your database.

Chapter 1: The Essentials

This short chapter will give you the essentials to create a database and get started entering references. There are also a few basic rules that will help the software understand what you have entered.

-*QuickStart*-

Let's assume that you have installed your software, have the program open and are anxious to see how it works without reading a book first. Okay, let's dive right in. First, we'll create a database where you can enter and save your information.

Creating your first database

Click **File | Database** | **New Database**. This opens the Save As dialogue box where you can enter a name for your new database. Unless you have a name in mind enter “General” and click **Save**. Close and restart Biblioscape. When Biblioscape reopens, it will open in the database you just created.

Now you have a database where you can store information about books, magazines, television programs, journal articles and nearly anything else you want to keep track of, even your CD collection. To get started, put a stack of books, magazines, journals or whatever you want to enter into your database near your computer and we'll move on to the next step.

Entering your first reference

Click on **New Reference** (right under File), which opens the Reference page. Here's where you will put your information for each item that you want to store in this database. You should be in the User Defined version of the reference page. If not, click on **User Defined** (right under Reference). This is the page that you will use to enter references into your database and will summarize everything you have entered for any single reference. To navigate on this page, you can use the Up and Down arrows on your keyboard, the Tab key or your mouse.

Reference types

The column on the left of the page lists typical entries for almost every reference type you are likely to encounter. You can make your selection on the first line, where it says Reference Type. Click the **Reference Type** line, then look all the way to the right of the line and you'll see an arrow putting downward. Click on it and you will see a list of reference types. Click on the one that best describes your first entry. If nothing else fits, use **Generic**. You probably noticed immediately that there are three different entry lines for books. The first is for a book that has no editor, the second is for a book that is edited by one or more people and includes the works of several authors, and the third is for a section of a book, for example, a chapter by one author in an edited book or an entry on one subject in an encyclopedia.

Authors

In most cases, the first entry line for a reference will be the author or authors, in some cases referred to as artists, programmers, composers, etc., but the same rules apply. They are simple and logical, and they are important.

> Rule 1 -- The format for authors is: LastName, FirstName MiddleName or Initial. Put a comma after the

last name and a period after the initial. If you enter two initials, include a space before the second initial. For a title, degree (Ph.D.) or abbreviation (Jr., Sr., etc.) add a comma, a space and the title. For example: Smith, Robert P. J., Jr.

Rule 2 -- When you enter more than one author, separate them with a semicolon *and a space*. If you don't know all the authors, add a semicolon, space, et al. comma (; et al.,). Entered this way, the computer will treat et al. (a Latin term meaning “and others”) as a last name.

Rule 3-- When you enter something written by an organization or corporation, enter the entire name without any commas, then put a comma at the end. (World Health Organization,) the comma tells the software that this is all one last name and it will be entered correctly. If you enter Smith and Sons, Inc., the software will treat Inc. as a first name. This rule also applies to authors with multiple last names, just put the comma after the last of the last names (Duchastel De Montrouge, Laurent).

Rule 4-- If the author is anonymous or unknown, leave the line blank. The formatting software will then make an appropriate entry.

Titles for books and articles

The next entry on the Reference page will probably be a title. Not as many rules here, and pretty logical.

Rule 1-- Enter the title with the capitalization as you want it to appear--All major words capitalized, first word capitalized, etc. This is mentioned here because some bibliographic software packages prefer that only the first word be capitalized.

Rule 2-- Don't put a period or other punctuation at the end of a title.

Most of the entry lines on the Reference page are self-explanatory, and they will be discussed in more detail later, but there are a few lines you should know about because they will be very important to you as you use Biblioscape.

Notes-- Before computers and bibliographic software became easily available, scholars and researchers made notes about their research of books and journals on the backs of 3"X 5" cards or in notebooks (this method is still discussed in current textbooks). Now, your notes about a book or journal article, whether a few words or many pages, can be entered into this area of the Reference page for any reference. Everything you know about any single book or article can be found on one Reference page! You may simply want to make a note as to where to find a particular piece of information or you may wish to enter a multi-page attack on the author's logic. If you have the space in your computer you can enter up to 256 MB of information in Notes for one reference.

Abstract -- Here you can enter a brief description of a book or article. Journal articles, dissertations and student theses are usually preceded by an abstract. Click on Abstract at the top of the Reference page, then type, paste, dictate or import an abstract into this space.

Document -- At the top of the Reference page click **Document**. Into this space you can enter almost anything; an Excel spreadsheet, scanned documents, files, graphics, and nearly anything else you can put into your computer. Here again you can store up to 256 MB of material. If you can access it, you could put an entire book here, complete with illustrations. You will be limited only by your imagination.

Keywords – Keywords are words that identify the subjects or categories of a reference. Include words that you would think of (maybe months) later when you are searching for this information. We'll only touch on keywords here, but you should be aware that Biblioscape allows you to sort and find your references with keywords in original ways. For each reference, put in a few good keywords for now, as they will help you find this reference when you need it. Keywords, like authors, are separated by a semicolon and a space (writing; research).

When you have completed entering the information for your first reference (try to fill as many blanks as possible), you can click **Save Reference** or simply click **New Reference**, and go on to enter the next reference. Biblioscape is good about saving your work as you go along, but clicking **Save** is a good habit.

Before you enter your second reference, click **References | Search | Lookup.** On the Lookup page, there will be a window in the top left corner displaying words including "Author" and "Title". Clicking on the arrow beside the window will open a list of all the Reference types. Click on **Author**, and you'll see the name of the author of your first reference followed by the number one. This means that in your entire database you have that author listed once. As your database grows, you will be able to use Lookup to tell you how many entries you have for one author, how many for one subject and so on before all of the various reference types. Lookup is just one of several very powerful search tools in Biblioscape, and understanding these tools will help you organize your material as you enter it so that you will be able to find it again when you need it. Take a quick look at the other search tools, then enter some more references.

Opening the Outlook Bar

If it's not already open, click **View | Outlook Bar** to open a vertical box containing several icons on the left of your screen. This is the Outlook bar and offers one click access to several features in Biblioscape. Clicking **View Outlook Bar** again will close it whenever you need extra space on your screen.

Viewing the references you've entered

After you have entered several references and feel comfortable with the Reference page, go to the Outlook Bar and click on **All References**. The Reference page is instantly replaced by the All References page, which shows a list of all the references you have entered into the database. Notice the icons in front of each reference representing books, journals, or other publication types. Click on the heading for this column of icons (the heading looks like a piece paper with one corner folded over), and you will find that all the icons have been sorted and like icons have been grouped together. You can also sort by year, author, and title in the same manner.

If you click on any reference in the All References page, you will see the bibliographic information for that reference in the small window at the bottom of the page. Double-clicking on a reference will open the References page where you can add or change information at any time.

Now you have started. You've learned how easy it is to enter information into Biblioscape and you already have several references in your database. The next chapters will provide more details on entering your information including, creating and linking notes, creating diagrams with the Charts module and importing references and research information from libraries, databases and other software programs.

Chapter 2: The References Module

(Go | References)

It will be worth your while to spend some time with this chapter, as the References Module is the heart of the Biblioscape system. This is where your bibliographic data is stored, organized and retrieved, and this is where you'll spend a great deal of your time while working with Biblioscape. Understanding the details in this chapter will help you organize and manage your research information. To get to the References module from anywhere in Biblioscape, go to the menu bar and click **Go | References.**

The References module has four primary functions:

Provide storage, organization and management of your information

Provide a formatting system that helps you enter (or import) your reference information into the computer while keeping uniformity between your references.

Provide search tools that help you find the information you need when you need it. (Section II).

Create citations, footnotes, reference lists and bibliographies for your documents and format them in the style of your choice. (Section III).

In addition, the Reference module works with all the other modules to provide an integrated system to help you manage and record all the elements of your research.

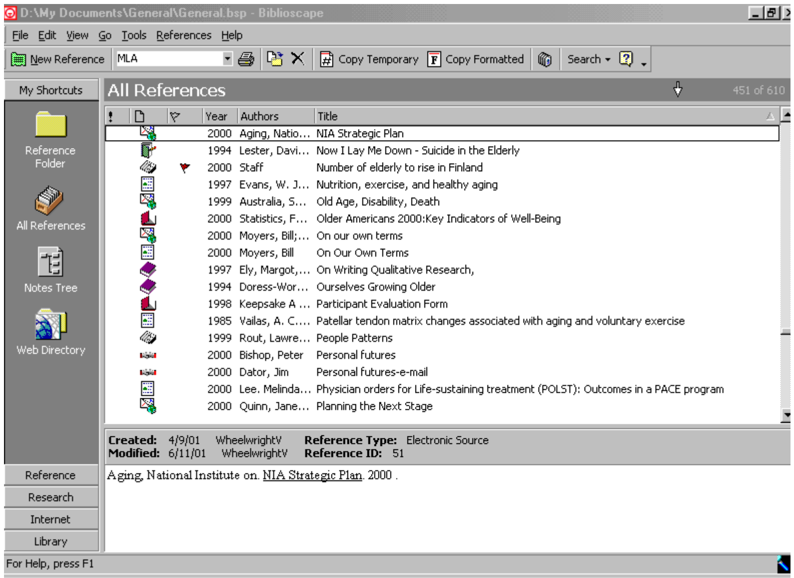


Figure 1 The References Module, showing the All References page

On your computer screen, Biblioscape provides a frame consisting of the Menu bar and the toolbars at the top and the Outlook bar on the left to help you navigate between the various pages that will be seen in the central panel, including the All References Page shown above.

In the References module, the central panel will display:

> **All References** page – a listing of all the references that have been entered into your database. The lists can be sorted, searched and tagged
>
> **Reference** page – the page where you enter the detailed information for a reference.
>
> **Folder** pages – the Folder pages are divided into three or four areas, or panels. The two panels on the right will

look very much like the All References page, with a listing of references that are included in a folder at the top and details of a highlighted reference at the bottom. The left panel includes a “tree” view of your folders.

Search pages – Several different search pages are included in References, and like the Folder pages, the panels on the right list selected references and the panel on the left contains the searching tools.

Figure 2 The Menu Bar (top) and the Tool Bar (bottom)

1 -- The Menu bar, with its mostly familiar titles, File, Edit, View, Go, Tools, References, Help.

2 -- The Toolbar(s), which varies with the various modules and pages.

3 -- The Outlook bar (see *Fig. 3* next page) on the left of the page offers five different views of icons that will help you maneuver between modules and pages in Biblioscape. There will be times when you want more room on the page and you can obtain it by clicking **View | Outlook Bar** to toggle the Outlook Bar off.

The Outlook Bar

The Outlook bar offers five views of icons plus the option of toggling the bar off to provide more room on your page.

My Shortcuts view of the Outlook Bar displays four icons (the fourth is not visible in this photo, but on screen it can be seen when you click on the arrow):

Reference Folder - Clicking here opens the Folder Page.

All References - Clicking here will open a listing of all the references that are in your database.

Notes Tree - Clicking this icon opens the Notes Page and the Notes Tree.

Web Directory - Click this icon, then wait for a moment, because it is taking you online (if you have an Internet connection) to an Internet search page and an impressive library of electronic databases

Figure 3 The Outlook Bar

Biblioscape Databases

In Biblioscape, you can have as many databases as you want, within the capacity of your computer system. Each database can handle more than 10,000 different references without losing searching speed, which means that unless you are storing huge amounts of information (many serious researchers do), you can keep all your references in one database and group different subjects into folders (more on Folders a little later in Section II).

There is one important fact to keep in mind before you create different databases for your various areas of interest. Eventually, you will probably create documents based on the information you've stored in your databases, and you will probably want to add citations, footnotes and bibliographies to some of those documents. The software that searches for and inserts references into your documents can only work with one database at a time. This gives you two options:

> 1- keep all your references that may end up in one document in one database, or;
>
> 2- when you insert and format citations, be prepared to move between multiple databases to find your references, and again when formatting your references. (This isn't as difficult as it sounds. See *Natural Citation*).

Creating a database

To create a database, click **File | Database | New Database,** which opens the Save As dialogue box. The default location is the References folder. Type in the name of your new database (you can call it "General" if you can't think of a name right now) and click **Save**. Click **OK** on the message that tells you that Biblioscape must be shut down after you create a new database. When you restart Biblioscape, it will open in the new database. Biblioscape will continue to start up in this database until you select a different one.

Opening and using databases

> <u>Opening a database</u>
> Click **File | Database | Open Database,** which opens a dialogue box. Find and select the database you want to work with and click **Open.**
>
> <u>Rebuilding a database</u>

Occasionally, information in a database will get out of order or corrupted. In most cases, Biblioscape will detect these problems and instruct you to rebuild the database. To do so, click **File | Database | Rebuild Database**. This is a simple procedure, so if you suspect a database problem, it is easy to rebuild the database.

Backing up a database

To backup your database, click **File | Database | Backup Database**. Because there is a risk that your hard drive may eventually develop problems, it's a good idea to back up to a different hard drive, possibly an external one. You can also protect your data by making copies of your databases in different hard drives on your computer using **File | Save As.** CD Writing drives are becoming inexpensive and offer a good alternative for off computer backup. Internet backup is also an alternative that is becoming popular.

Deleting a database

To delete a database, go to **My Computer**, find the files for the database you want to delete, highlight the folder where your database files reside and click **File | Delete**.

Configuring a remote database (New in Biblioscape 5)

This feature enables you to enter and store database addresses for easy access. With an address stored, you can connect to remote databases from your computer with just a few clicks. The remote database must reside on a PC with BiblioRemote server running.

To activate this feature, click **File | Database | Configure a remote database | New**. Enter and save a filename for the database then enter the information necessary for contacting the database, including the IP number, your username and password, then click **Save**.

To access this database in the future, simply click **File | Database | Open**. A remote database has the *.bsr file extension, while a local database has the *.bsl file extension.

The next chapter will show you how to use the All References page to view, sort and preview the references in your database.

Chapter 3: The All References Page

(Go | References)

To open the All References page, you can either click on the All References icon in the Outlook Bar on the left of your screen, click on the Retrieve All icon in the toolbar or go to the menu bar and click **References | Retrieve All**.

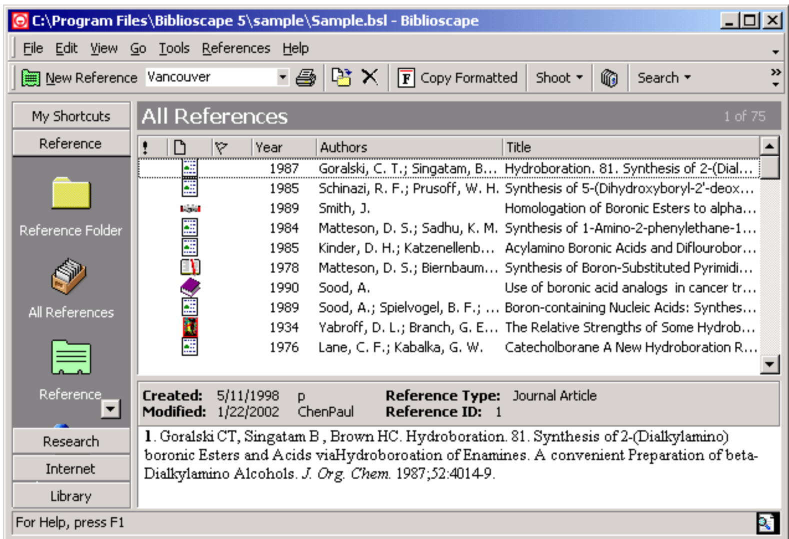


Figure 4 The All References Page

Figure 4 provides a view of the All References page. You'll notice that the top of the screen follows the Windows format, with the first bar identifying your database directory, followed by:

> <u>The References toolbar,</u> which includes a button to open New References, a window in which to select output styles, the Print button, the Move to Folder button, the Copy Temporary button, the Copy Formatted button, a

Retrieve All References button, the Research Menu button and a Help (?) button. Explanations for all these button are a little further ahead.

The central panel of the All References page lists all the references you have entered into your database, including an icon representing the type of entry (book, journal, newspaper, etc.), the year the work was published, the author and title.

The Headings bar is considerably more important than just providing names for each of the columns, as it provides a powerful sorting tool as well as ways to designate the relative importance of your references. In this example, the columns appear as they are when you install Biblioscape. You will be able to change, add and delete columns to meet your own preferences.

> The first column, headed by an exclamation point, offers you a way to indicate which references are high priority and which are low priority.
>
> The second column contains icons representing the various types of references (book, journal, newspaper, etc.) that you have listed. This column can be sorted by clicking on the heading, which will cause all entries to be grouped by reference type.
>
> The third column allows you to flag any entry, then sort all flagged entries to the top of the column.
>
> The Year, Authors and Title columns can all be sorted in *ascending* order. It's interesting to note here that the authors of this program had to make a choice. They could also have offered you a

descending sort, but in so doing they would have sacrificed speed as the number of entries in your database grew. They chose the speed option, and as a result you can enter more than 10,000 different references in one database and still have instant sorting.

The Preview Panel at the bottom of the All References page provides the bibliographic information for whichever entry you have highlighted. The bibliographic information will be presented in the style that appears in the Style window on the toolbar. There is also a header bar indicating when the reference was created or modified, the type of reference and the reference ID number. That ID number will become important when you start inserting citations into your documents. There is an open area on the right of the bar that will display icons indicating links to external files or web sites or that documents are attached.

In Chapter 4, you will work with the Reference Page, where you will enter detailed information for each of your references.

Chapter 4: The Reference Page

A quick overview

The Reference Page is the page into which you will enter all the information about each of your references. Each Reference Page represents one line on the All References Page, or one complete reference. Put as much information as you have available on this page, because you may not come back to this information for months. Also, the information on this page, particularly Keywords, will help you find this information when you need it.

Creating a new reference

Open the Reference Page from All References by clicking on the **New References** button. Note that when the Reference Page open, that button becomes the Save Reference button. The Reference page has several views available on the tool bar.

In the next figure, you can see this bar in the context of the whole page.

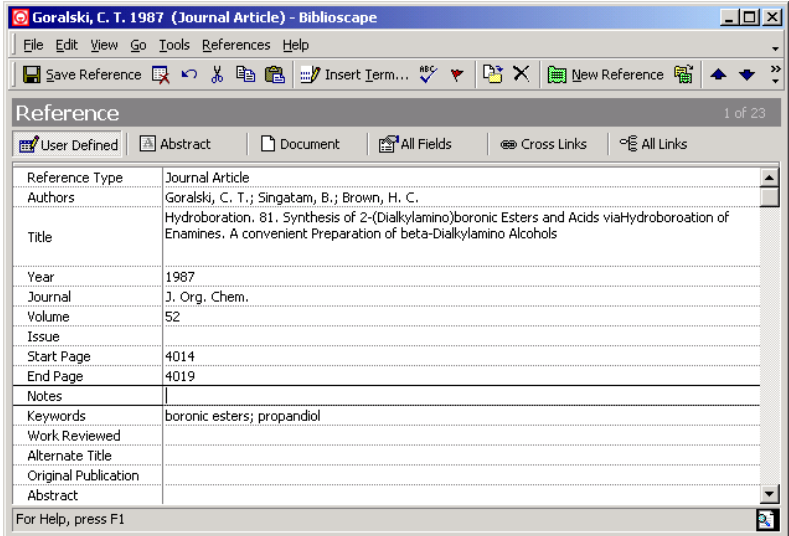


Figure 5 The Reference Page, User Defined view

User Defined view 

Look at the panel at the top of the Reference page and you will see (right under the title Reference) that the User Defined button is highlighted. This is the view that will probably be most convenient for you when entering your reference information. Each line on this page is a “field”, and the information you put on these lines will become very important, for example, when creating citations and bibliographies and also when searching for references. More information is better.

Abstract view 

You can enter an abstract here either by clicking on the Abstract line or by opening the Abstract view. You can enter information here in any of several ways, including typing, dictation (if you have dictation software), copy and paste or when importing a reference. This is actually a multidimensional page, since once you have entered your reference information, whatever you have recorded on the Abstract line, the Notes line, or the Keywords line will appear in separate panels in this view. Each of these panels offers virtually unlimited (256 MB) space. Very convenient.

Document view 

This is a very interesting page. You can put virtually anything here that you want - full text documents, graphics, spreadsheets and even Web pages. Better yet, you can mix them all together in a virtually unlimited (256 MB) space. You can also enter information here by typing, dictation or copy and paste.

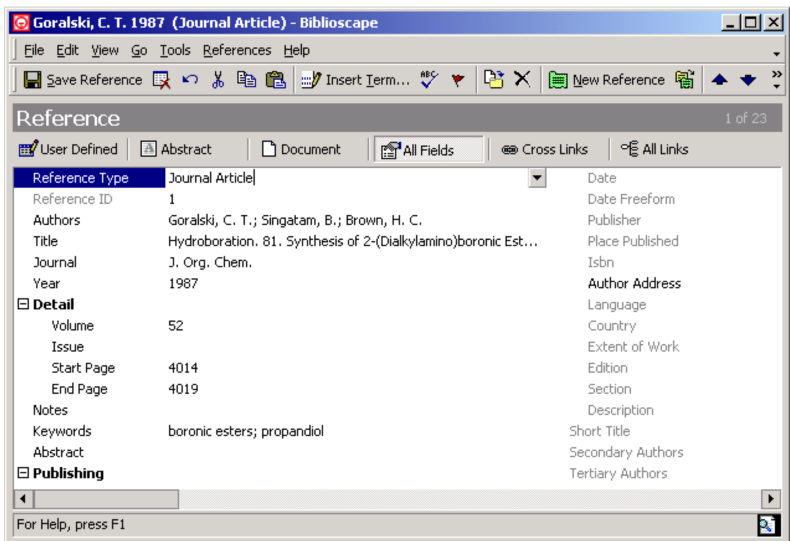


Figure 6 The Reference Page, All Fields view

All Fields view 

The All Fields page could be described as an exploded view of the User Defined page as it includes all the available fields not specific to a certain reference type. Look at the boldfaced headings and note the "minus" symbol that allows you to collapse the lines below the heading.

Cross Links view 

In this view, you can create links between references. Start by clicking **Add Link**, which opens a dialogue box that includes the contents of your open folder. You can select whether the link is to be a one-way link or a two–way (bidirectional) link. You can determine the Link type from the drop-down menu (Related, Supportive, Contradictory, Cited or type in a relationship) and add comments in the Comment window.

If you find a need to change folders, choose a folder from the drop-down list in the Go to Folder window and click on the arrow to the right of the window to open the selected folder.

To finish creating your link, select a reference from the list and click **Add Link**. If you have other links to add, select another reference and click **Add Link**. When you have selected all your links from the list, click **Close.** The dialogue box will close, and your links will be listed on the **Cross Links** page.

All Links view 

The All Links view presents a tree showing any links identified by Biblioscape between your selected reference and all other references in the database. For example, each author of the reference will be shown on the tree with a "+" sign following the name. Clicking on the "+" sign by any author's name opens branches on the tree displaying all the references in the database for which that person is an author.

Similarly, clicking next to a keyword on the tree will open a list (by author) of all references in the database that share the keyword. Double clicking on an author's name will take you to the All Links view of that reference

Entering references
To enter your reference information on the User Defined page, start by clicking on the first line of the Reference Page and selecting a reference type.

Reference type- Biblioscape offers 27 predefined reference types, which you can view by clicking on the Reference Type line and using the arrow at the right end of the line to scroll down. The default on this line will be the same reference type as the last one entered. Very convenient if you're entering references from a stack of journals, as each new page starts on the Journal page. The Reference type you select will determine which fields are included on your Reference page for that entry.

The reference types include (descriptions are to help you keep uniformity in your entries):

<u>Artwork</u> (any work by an artist -- painting, sculpture, crafts, etc.)
<u>Audiovisual Materials</u> (cassette, CD, slide, photographs, overheads, etc.)
<u>Bill</u> (a legislative bill or proposed law)
<u>Book</u> (a whole book, monograph, pamphlet, etc.)
<u>Book Edited</u> (any book with an editor, often in a series)
<u>Book Section</u> (any section of a book, including a chapter or an essay)
<u>Case</u> (a legal case or a case history)
<u>Computer Program</u> (software program, shareware, freeware, etc.)
<u>Conference Proceedings</u> (a report published after a conference)
<u>Document</u> (any computer or paper based document)
<u>Electronic source</u> (Web site, etc.)

Film or Broadcast (movie, TV show, or broadcast program)
Generic (any data type that won't fit another format)
Hearing (a public meeting or hearing)
Journal Article (an article, review or communication published by a scientific journal)
Magazine Article (an article published in a magazine)
Manuscript (a work prior to publication)
Map
Musical Score
Newspaper Article
Note (a note or idea that may be used as a reference.
Patent (Patent formats vary between countries. Use the miscellaneous field when in doubt)
Personal Communication (letters, emails or other communications between individuals)
Report (reports issued by individuals or organizations)
Serial (any regular publication. This heading is mainly for cataloging in the Library module).
Statute
Thesis (Unpublished papers including Master's and Doctoral theses)

A few comments about making entries to the reference page

Most entries are self explanatory, but here are some notes that will be helpful. You can also find more detail if you need it at the Help button.

Authors
In most cases, the first entry line for a reference will be the author or authors, in some cases referred to as artists, programmers, composers, etc., but the same rules apply. They are simple and logical, and they are important.

Rule 1 -- The format for authors is: Lastname, Firstname Middlename or Initial. Put a comma after the last name and a period after the initial. If you enter two initials, include a space before the second initial. For a title, add a comma, a space and the title. For example: Smith, Robert P. J., Jr.

Rule 2 -- When you enter more than one author, separate them with a semicolon *and* a space. If you don't know all the authors, add semicolon et al. comma (; et al.,). Entered this way, the computer will treat et al. as a last name.

Rule 3-- When you enter something written by an organization or corporation, enter the entire name without any commas, and then put a comma at the end. (World Health Organization,) the comma tells the software that this is all one last name and it will be entered correctly. If you enter Smith and Sons, Inc., the software will treat Inc. as a first name. This rule also applies to authors with multiple last names; just put the comma after the last of the last names (Duchastel De Montrouge, Laurent).

Rule 4-- If the author is anonymous or unknown, leave the line blank. The formatting software will then make an appropriate entry.

Titles for books and articles
The next entry on the Reference page will probably be a title. Not as many rules here, and they are pretty logical.

Rule 1-- Enter the title with capitalization, as you want it to appear -- all major words capitalized, first word capitalized, etc. This is mentioned here because some bibliographic software packages prefer that only the first word be capitalized.

Rule 2-- Don't put a period or other punctuation at the end of a title.

Short Title

This entry is used to differentiate between multiple works by the same author when entering citations. Required in MLA style.

Year

The year of publication

Date

Enter a complete date in all numerals. Biblioscape accepts most numeric formats. If your reference has only a partial date (March, April-May, Summer), enter it on the Date Freeform line. If the Date Freeform Line is not showing on your reference page, Click the **All Fields** view and enter it there.

Notes

This line is an expanding field for notations *about this specific reference*. There is also a Notes module (**Go | Notes**) in Biblioscape, totally unrelated to this line, where you can make notes that are not related to a specific reference or that may be linked to several references.

Before computers and bibliographic software existed, scholars and researchers made notes about their research of books and journals on the backs of 3" X 5" cards or in notebooks (this method is still suggested in current textbooks). Now your notes about a book or journal article, whether a few words or many pages, can be entered into this area of the Reference page for any reference. Everything you know about any single book or article can be found on one Reference page! You may simply want to make a note as to where to find a particular piece of information or you may wish to enter a multi-page attack on the author's logic. If you have the space in your computer, you can enter up to 256 MB of information in the Notes field for one reference.

Abstract
This Line is an expanding field where you can enter or import a brief description or summary of a book or article. Journal articles, dissertations and theses are usually preceded by an abstract. Click on **Abstract** at the top of the Reference page, where you can also type, paste, dictate or import an abstract into this space.

Keywords
Biblioscape allows you to sort and subdivide with keywords in original ways. For each reference, put in a few good keywords that range from very general to very specific, as they will help you find this reference when you need it. Keywords, just as in the instructions for authors, are separated by a semicolon and a space (writing; research).

Attachment
On the Attachment line, you can enter a file address (from anywhere in your system, not just in Biblioscape), the address of a program or an Internet address, Clicking on this line will connect you to that address and open the page or program. If the Attachment line doesn't show up on your Reference page, simply click the **All Fields** view button and enter your attachment address there. This works much like an email attachment in that you can browse for a file or program from the Attachment line.

Whenever you enter information on this line, Biblioscape creates an icon on the header bar for the Preview panel on the All References page. This alerts you that an attachment is available for this reference.

These first chapters have included considerable detail and covered quite a bit of space, yet we've only covered about half of the capability of the Reference Module. Chapter Seven will show you how to import bibliographic files from other software programs and Chapters Nine and Ten will show you how to organize your references using folders and how to search for information you have saved in Biblioscape. Chapters 12 and 13 will show you how to enter citations into your documents and how to create bibliographies, footnotes and lists of references. All of this, at the heart of your research information management system, is the References Module.

The next chapter, The Notes Module, will explain how to manage the notes you make about your research. These will be notes that are not related to one specific reference (which would be added to the Reference Page), but can be about anything you think may be interesting or helpful.

Chapter 5: The Notes Module

(Go | Notes)

Traditionally, bibliographic software has centered around building databases of references then using those references as citations and bibliographies, with emphasis on correctly formatting the various documentation styles. Also traditionally, scholars have kept notes about their personal thoughts, calculations, observations and conclusions on note cards or in notebooks (like Leonardo da Vinci's famous note-books), a method still being recommended in college texts. The Notes module will allow you to keep notes about anything that interests you, and to organize those notes so you can access them quickly and easily. A few features of "Notes" include:

- Large space- 256 megabytes, enough space to store an entire book.
- Notes pages accept any form you can get into your computer- keyboard entry, dictation, copy and paste, images, web pages, spreadsheets, etc.
- Notes can be subdivided into "Child" notes. For example, if the main page of notes is about WWI aircraft, a "Child note" could be created for notes about the Sopwith Camel, and another for notes on the "Red Baron." Yes, before you ask, you can create great-grandchild notes. Try it!
- Any note can be linked to virtually any other area within Biblioscape, a file anywhere in your computer, even to a Web Page.

-QuickStart-

In Biblioscape click **Go | Notes | New Note**. In the box that appears in the left column and says “New Note”, type a name for a note, probably related to one of the references in your database. If no name comes to mind enter “general”. Move to the large pane that looks like a word processor page (it is) and type a note about one of your references. This is your first note and entered in probably the easiest way, simply by typing it in.

Go to one of your folders and select a reference that is likely to have an abstract or a quotation attached. If you have not created folders, click **All References** and select a reference. Assuming the reference you have selected includes a quote or an abstract, highlight any portion of that quote or abstract that is of interest to you, click on the **Copy** icon in the toolbar, click **Go | Notes**, return to your note page and click at the point where you want to add the quote you just copied and click on the **Paste** icon. This is one way to collect quotations from different references into one note page, but it's a good idea to add the authors name to each quotation so you can find the reference when you go to cite it.

You can do the same thing with resources outside of Biblioscape, for example, by going to one of your word processor files and copying a line, a paragraph or the whole file then pasting it into your Notes page. You can also do this with an image file, an OLE object, a Web Page or a spreadsheet. Nearly anything that you can see in your computer can be added to a Notes page.

The Notes Page

Open the Notes page by clicking **Go | Notes** or by clicking on the Notes Tree icon in the Outlook Bar. The column on the left of the Notes page displays the Notes Tree, which lists the titles of all the notes you have entered and displays them in a “tree” diagram, including branches for sub-notes, called “Child Notes” in Biblioscape.

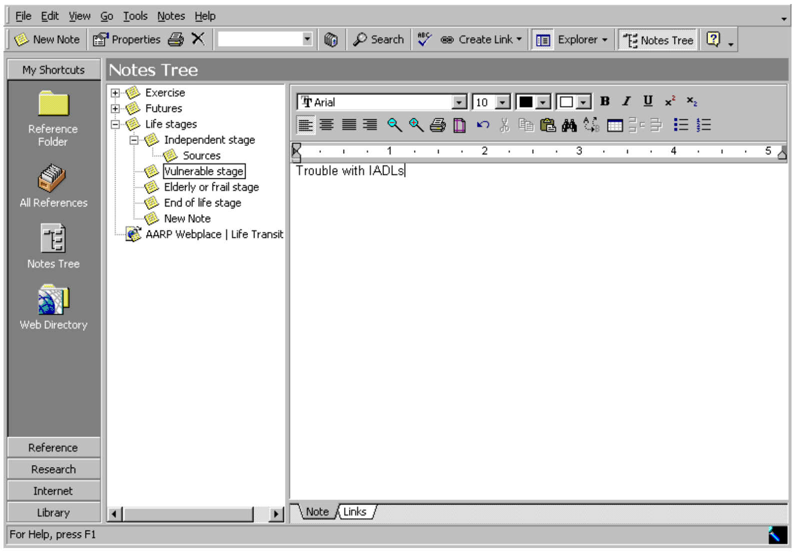


Figure 7 The Notes Page

The central portion of the Notes page is a word processing page with typical toolbars at the top, but with three tabs at the bottom:

> Notes -- the page where you type, dictate, or paste your notes, diagrams, photos or other pieces of information that you want to record.
>
> Links -- here you can create links between your notes and references, other notes, files in your computer, Web sites, etc.
>
> Web Capture (Only appears on notes when you have captured a Web page)-- If you capture a Web page into

your note, the text in that page will appear as a note, but the complete page will appear on the third tab, including links.

Creating a Note --- 

To create a note, click **New Note** and you'll see a “New Note” box opened in the Notes Tree column. Type in the title of your new note, then click in the word processing area where you can type, dictate, or paste the information for this note. With 256 MB available for this page, space is virtually unlimited.

Type a note -- use the space just like any other word processor.

Dictate a note -- if you use dictation software with your usual word processor, you will probably find it’s compatible throughout Biblioscape. Dictation is a very convenient way to enter long blocks of information that cannot be pasted in.

Paste a note -- copy and paste is a very easy way to get information into your notes. From your references you may wish to copy quotations from abstracts or from full texts. You can copy from files in your computer or on web pages. Photos, diagrams and OLE objects can also be copied into your Notes page.

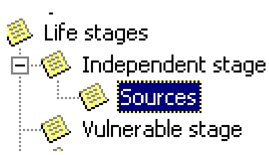
Creating a Child Note

From a Notes page, click on **Notes | New Child Note** (or right click your mouse**)** to create a subdivision or a branch from your note page. For example, if your note page was titled Europe you could open a child note and title it Italy. From here, you could create a note page for France (child note of Europe) by simply clicking **New Note** or you could create a sub note of Italy by clicking **Notes| New Child Note** and typing in Rome. If it sounds little confusing, the rule is to click **New Note** in order to create a note at the same level on the Note Tree. If you wish to create a sub note, or another branch from the tree, click **New Child Note**.

Notes organization

Tree view --- 

The Notes Tree is a simple diagram of the relationships between notes. The plus (+) sign on the tree indicates that there are sub (Child) notes, which can be seen by clicking on the + sign. The Notes tree will show up to six generations or sub-divisions of a note in its normal view. The column can be made wider (or narrower) by dragging the lines on either side of the column.



Notes can be moved within the tree structure by "drag & drop". If you drag a note up or down the tree, any related "child" notes will follow.

Figure 8 Section of Notes Tree

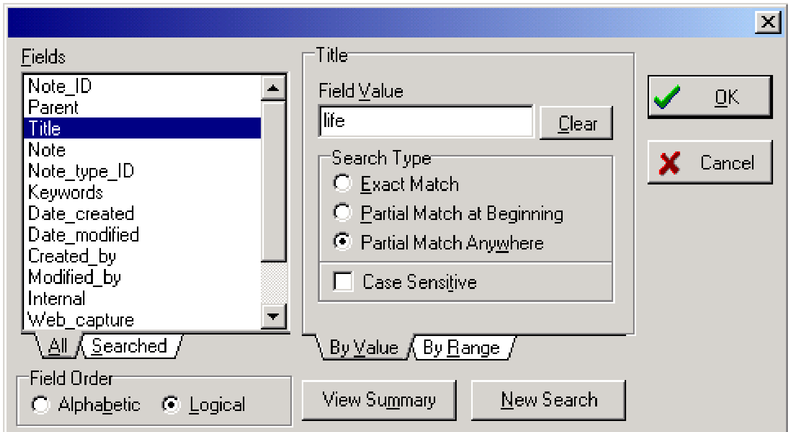
Table view -- 

The table view of your Notes titles includes an alphabetic listing of the titles followed by a column showing the date each note was created. Both columns can be sorted (ascending or descending) by clicking on a heading.

Searching your notes

<u>Advanced Search</u> allows you to search multiple fields in a reference using Boolean operators. For example, you

could search for all listings for a specific author before or after a specific year. To accomplish this search, you would click **Search** in the toolbar or **Notes | Search** which opens the Advanced Search page and a dialog box.



The pane on the left of the dialogue box shows a list of searchable fields. Select a field, Keyword for example, then enter a keyword into the window in the center. Select the type of match, then click OK.

This is a relatively simple search, but demonstrates the power of this search tool. Experiment with different combinations in the search windows to get a clear idea how this tool can help you find information you need quickly.

Linking your notes

Linking can be an excellent tool. For example, you can link quotations (that you have assembled in your notes to support an argument) to the original reference for easy citation. If you have several quotations from different references on one Notes page, you can create links to each of them. You can also link to notes on other Notes pages, to other files in your computer or to web pages.

Linking a note to a reference
Go to the folder containing your reference, locate and highlight the reference and while pressing the **Ctrl** key, type **L** (Ctrl+L). This opens a dialogue box that allows you to select the Note page to which you wish to link. Select the Note page and click **Link.** Your link will appear on the Links view of your Notes page.

Linking a note to another note
From the Notes page where you want to create a link, click **Notes | Create link | Link to Notes**. The *Link to Notes* dialogue box will open and you can select a note to link to. Click **Link.** Your link will appear on the Links view of your Notes page.

Linking a note to a file
From the Notes page where you want to create a link, click **Notes | Create link | Link to Local file.** A browse window will open from which you can select the file to which you want to link. Click **Open** and your link will appear in the Links view of your Notes page.

Linking a note to a web page
From the Notes page where you want to create a link, click **Notes | Create a link | Link to web site.** An Input box will open, instructing you to enter the Web URL. Type in the URL and click OK. Your link will appear on the Links view of your Notes page.

Capturing a web page into your notes

Information on web sites changes frequently, so a URL may not be sufficient to return to information you need at a web site, yet, sometimes copying doesn't work easily on a web site. Biblioscape not only allows you to capture web site information, but also indexes all the captured text. To capture a web page, click **Go | Internet**, which will take you to the Biblioscape web site. Very importantly, you will have an Internet address window on your tool bar and a display area for web pages, all inside the Biblioscape frame. This gives you Internet access and Biblioscape tools at the same time.

Enter the URL for the web page you wish to capture in the Internet address window on the Biblioscape tool bar. When you have reached the page you wish to capture, click **Web | Capture Page | As a Note**. This will open the Save Web Page browse box where you can select the place to save the web page as a file. The title of your web page will appear in your Notes Tree window, and when clicked upon, will open a text version of the web page. This page can now be edited just like any word processor document. For example, you may wish to remove advertisements, footers or other extraneous material. At the bottom of the Notes Page, there will now be a third tab, "Web Capture", which will contain the entire web page, complete with links.

The Notes module adds a lot of versatility and capability to Biblioscape. As you use Notes more, you will discover new ways to make Biblioscape even more useful to your research.

The next chapter will show you how to create diagrams that will illustrate some of the points of your research.

Chapter 6: The Charts Module

(Go | Charts)

The Charts module offers a way to quickly create charts or diagrams to illustrate your research and to link or copy them to other modules, including References, Library, Notes and Tasks. All this can be done without ever leaving Biblioscape. The Charts module is very effective for illustrating relationships, and flow charts or organizational charts can be created here, then copied and pasted wherever needed, or linked to a reference or note.

-Quick-Start-

Click **Go | Charts | New Chart** and enter a name for your chart or diagram in the box labeled New Chart in the left column. Next, click **Edit Chart**, which opens the chart editor. On the left side of the chart editor is a "toolbox" which is divided into the four boxes plus a color palette at the bottom. The top box, labeled Create holds two icons; one for creating Objects and the other for Connections.

Move down to the Object box and select a shape by first clicking on the **Shape Style** (open square at the top of the box), then select a shape (rectangle, triangle, ellipse, diamond, etc.). Move back up to Click on **Object**, in the Create box, move your cursor out into the work area and select a place for the first object. Hold down the left mouse button and move the cursor down and to one side until the shape is the right size, then release the mouse button. To create a second object, click on **Object** in the Create box, (click on **Shape Style** in the Object box again only if you want a different shape) and place the shape in the work area, about an inch to the right of the first object. For each object (or shape) you create, you must first click in the Create box.

To make a connection between the two objects that you have just drawn, move the cursor down to the Connection box. On the right side of the Connection box, select the second item (Destination Arrow, under the “F”), which opens a drop down menu. Click on the arrow, then move up to click **Connection** (the double headed arrow) in the Create box and move the cursor onto the work page. Click on the object on the left, holding down the mouse key and dragging a line to the object on the right. Release the mouse key. You should now have an arrow pointing to the object on the right. To change the size of the arrowhead, click the third item on the right of the Connection box (“Destination arrow size”), select a size and click on the arrowhead at your second object.

To add color, click on either object (six black squares around the object indicate it is selected), then touch the cursor on any color in the palette and click the left mouse button to select a color for the perimeter of the object. Now point to another color and click the right mouse button to fill the object with color. In the lower right corner of the Charts Editor, click **OK**, and your image will move to the Charts page. With that, in just a few paragraphs you have tried most of the features in this module. The chapter below will have more details.

The Charts Page

The Charts page is simple in appearance; a column on the left lists all the charts that have been created and the panel on the right displays whichever chart has been selected from the list. When you are creating a new chart or editing an existing chart, the Chart Editor, with its tools, lays on top of the Charts page while you work.

Creating a chart or diagram

On the Charts page, click on **New Chart**, which will place the Charts icon and a title box at the bottom of the list of charts on the left of the page. Type in a name for your new chart, then click on **Edit Chart,** which will open the Chart Editor. You could also open an existing chart by clicking Chart Editor.

Throughout this chapter, you'll find the term “selected object”. A single click on an object will “select” it, and six black squares will appear around the object. Once selected, an object can be moved, resized, colored or changed in other ways.

Chart Editor

<u>Create</u>-- Always click on either **Object** or **Connection** in the Create box to add either an object or a connection in the workspace.

Object- Click here first to select a different object shape than the one that is currently shown.

Connection- Click here first to select a connection or to re-size an arrowhead.

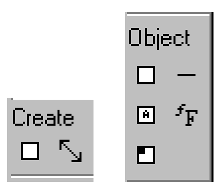


Figure 9 The Create Box and the Object Box

Object Box-- Holding the cursor on any of the small icons in the Object Box will cause one of the following descriptive names to appear.

Shape Style- Click to open a drop-down box of shapes that you can create.

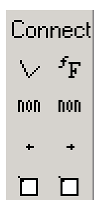
Text Layout- after placing text in an object, click to open a drop-down box that lets you choose where in your object (shape) the text should be placed.

Imaging Layout- after placing an image in a selected object, clicking here opens a menu that lets you select a position for the image inside the object.

Shape Line Width- opens a drop-down menu of line widths available for the border of a selected object.

Text Font- (For object) click to select or change a font or its size, style or color.

Connect Box-- Holding the cursor on any of the small icons in the Object Box will cause one of the following descriptive names to appear.



The Connect box contains eight icons that set the parameters for the connections between shapes. You can set the styles and positions of your connectors and arrowheads here before you create connections.

Figure 10 The Connect Box

Connection type - Select from straight or curved lines, and either horizontal or vertical stepped lines. When you select a curved or stepped line, it may be straight when drawn, but if you click in the center of the line, you can create a bend or an angle by dragging the line with your mouse. In the stepped line, you can click at different points on the line to create multiple angles.

Source and Destination arrows - These three icons let you choose the type of connection a line makes with the source object. The default is none, which means that the no symbol will mark the point where the connecting line intersect with the perimeter line of the object. You can also select a symbol such as an arrowhead, a circle and a square.

Source and Destination Arrow Size - These five sizes apply to the arrows you selected above and apply either to the source (left icon) or the destination (right icon) end of the connecting line. Although the box shows arrowheads, the relative size also applies to circles and squares.

Link to point of Source object and Destination object – Selecting a position from the drop down menu determines the linking point on either a source object or a destination object

Text Font - (For connection) click to select or change a font or its size, style or color.

<u>Zoom</u> -- To change the viewing size of images on the screen, click on the zoom button, then move the magnifying glass pointer into the work area and click. Each click will make the object look larger. To zoom out, hold down the “ALT” key while clicking the magnifying glass pointer.

Color palette -- Select one object to which you wish to add color, then point to the color you have chosen.

Clicking the Left mouse key will change the border or perimeter color of the selected object.

Clicking the Right mouse key will fill the selected object with color.

Edit Object and Edit Connection -- Double clicking on any object will open the Edit Object dialogue box, which has three tabs.

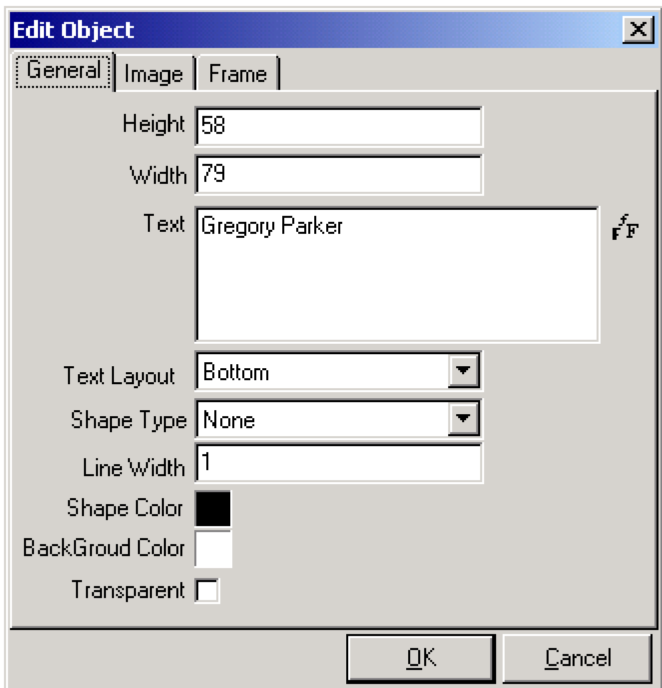


Figure 11 The Edit Object Dialogue box

The *General tab* lets you make changes by typing rather than dragging.

The *Image tab* lets you select images to place inside objects.

The *Frame tab* lets you select from a number of attributes for the frame of an object.

Double clicking on any connection will open The Edit Connection box, which has all its elements on one page, where you can add text or make changes to a connection.

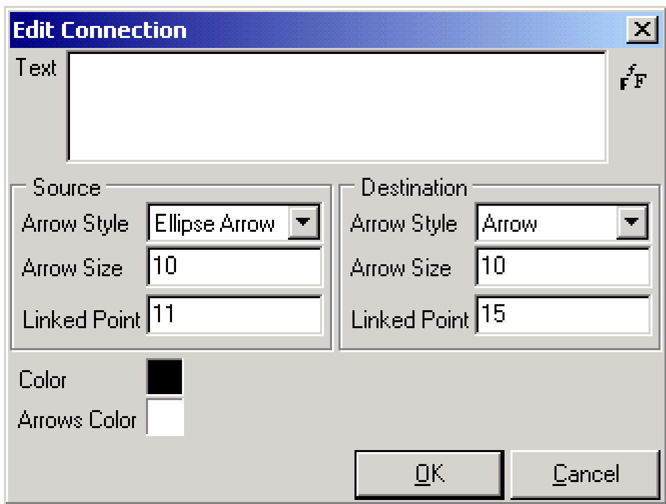


Figure 12 The Edit Connection dialogue box

<u>Bring to front and Send to back</u> -- When two or more objects overlap, these icons on the Edit menu allow you to select which object appears "on top".

<u>Unions</u> -- Objects on one page in the Chart Editor can be virtually connected as a union. Select one object (the

"main" object), then click **Edit | Select all**. Next, click **Unions | New Union**. This action ties the objects together, so that if the main object is selected, then moved, all objects in the union will move with it. If the main object is filled with a color, the other objects in the union will take the same color. Individual objects can be added to or deleted from the union by clicking **Unions** and selecting an action from the drop down menu.

When you finish editing

When you have finished editing your chart, simply click **OK** at the bottom of the Chart Editor and your chart will appear on the Chart page. You can edit an existing chart page at any time by clicking **Edit Chart** on the tool bar.

Linking your charts and diagrams to your notes

After you have put your chart on the Chart page, you can create a link to a note by clicking on the Link to Note icon on the toolbar or by clicking **Charts | Link to Note.** A dialogue box will open, showing your Note tree. Select the note to which you wish to link, click on it, then click **Link**.

Charts can be a very helpful tool, whether you use the diagrams as notes to yourself or to illustrate papers and articles. The next chapter explains how to import bibliographic information that you have created in another program such as your word processor, spreadsheet or a bibliographic program.

Chapter 7: Importing the bibliographic information you have already entered and saved somewhere else

(Go | References)

Most of us who need research information management software have already tried keeping our bibliographic information in a few different software programs. This chapter will help you import your data from bibliographic programs, spreadsheets, popular databases and other software systems. Biblioscape offers filters for most of the recognized bibliographic software programs as well as filters for importing data in delimited formats.

Although there are several steps, the process is relatively simple. First, you must open the program where the data you want to import is stored and export the data into a temporary file. Next, you will open Biblioscape and import the temporary file into the database and folder of your choice.

-QuickStart-

Because there are so many software packages where bibliographic information can be stored only two examples will be shown here in Quick-start. Details of importing references from these and a number of popular software packages can be found in this chapter.

Importing from bibliographic software, in this example, EndNote:

Start EndNote and click **File | Output Styles | Refer Export.** Next, click **File| Export,** which opens the Export File Name dialogue box. Select the Reference Library or file you want to export to Biblioscape, select **Text File** as the file type. Be sure to note where the file will be saved, because you'll have to find it again in a minute, and click **Save**.

Start Biblioscape. If you don't already have a file folder into which you want these files imported, create one. Otherwise click **File | Import...,** opening the Import Bibliographies dialogue box (*Fig. 13*). Click the **Browse** button and select the file you just exported from EndNote. Select **Tagged** as the file type and click on the scroll-down arrow to find and click **EndNote -- Refer**. In the bottom window you can select a folder for your imported references or they can go into the default folder, My Folder. Click **Start** and an information box will appear to tell you how many references have been imported.

Importing bibliographic data from spreadsheets and databases, in this example, Excel:

Start Excel and open the spreadsheet that you want to import into Biblioscape. Click **Edit | Move or Copy Sheet** and check **Create a copy**, select a place in the book for the new worksheet and click **OK**. Now you can make radical changes without changing or destroying the original worksheet. In order to convert the information on this worksheet to a delimited file, you will need to eliminate all your existing headings then create a row of headings that are compatible with Biblioscape. For this exercise, you will only work with a few essential columns so you can get a clear idea of how this process works. Details for importing all your information are in this chapter.

If you have a column that lists the type of reference (book, magazine article, journal article, etc.), type "Ref_type" as the heading for that column. The heading for your column of authors' names will be "Authors". Book and article titles will be listed under "Title" (singular) and publishers will be listed under "Publisher" (also singular). Delete the rest of the information on your worksheet (that's why you created a copy). Click **File** | **Save As,** opening the Save As dialogue box. Select a directory where you will save your file and enter a name for the file that you are importing into Biblioscape. In the bottom window select **Text (Tab delimited)(*.txt)** and click **Save**.

Start Biblioscape and create a new folder by clicking **References | Folder | Create Folder** and typing in a name for the new folder. Click **File** | **Import**, opening the Import Bibliographies dialogue box. Click **Browse** to find the text file you saved in Excel and click **Open**. In the Import Bibliographies dialogue box (*Fig. 13)*, select **Delimited** as the file type, **Tab** to separate the data fields and the quotation marks(") to surround strings. Click in the **To Folder** box and select the folder that you just created. Click **Start** and watch as Biblioscape imports the information from your Excel files. When the import is complete, Biblioscape will open a box telling you how many references were imported. Click **OK** and take a look at the references you have just imported into your new file folder.

If any of the data did not come through the import process exactly as you expected, it probably will have to be organized differently in the Excel spreadsheet and you'll find suggestions in the chapter. Since this was just a practice exercise, you can delete this import by clicking on the folder name in the tree column, then click **References** | **Folder | Delete Folder**. A confirming box will open to ask if you're sure about deleting this folder, and if you are, click **Yes**.

These two techniques for importing references cover most of the situations you will face when moving data from another software program into Biblioscape. There will be minor variations for each program, but the principles will remain the same.

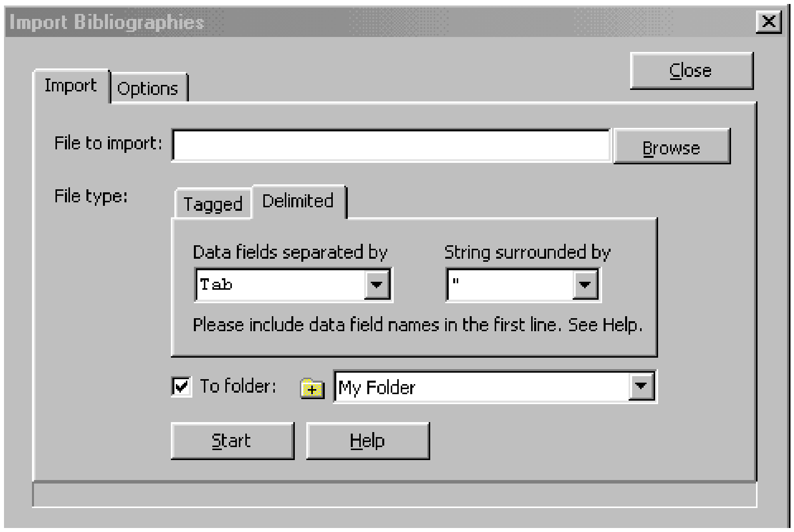


Figure 13 Import Bibliographies dialogue box

Importing references from bibliographic software programs

General principles of importing bibliographic data

Each bibliographic software program has its own format for storing data, so the first step in importing references is to convert that data into a common format that can be read by Biblioscape. In most cases, the common format will be a text file, so the basic steps are:

Open the originating program and the file where the references are stored.

Click **File | Export** or the equivalent for that program

Select the filter recommended by Biblioscape (**File | Import Filters**)

Export the file as a text file and save

Import the text file into Biblioscape (**File | Import** to open the dialogue box *Fig. 13*)

If your import fails, or Biblioscape says that only one record was imported, try again. Importing requires a number of steps, and one misspelled word (just like Web addresses) can cause the whole import to fail. These techniques do work, but they require precision.
If your import is successful, examine several of the references before mixing them into your database. It is usually easier to correct and repeat the import rather than correct each of the new references.

Creating text files for export and importing to Biblioscape – a few examples

If you have references in a program that is not one of the examples here, send an email to: support@biblioscape.com with the name of the software and ask for the suggested filter and method for importing. Most program publishers make it easy to share references with other bibliographic programs, but some do not.

EndNote

Start EndNote and click **File** | **Output Styles | Refer Export.** Next, click **File** | **Export,** which opens the Export File Name dialogue box. Select the Reference Library or file you want to export to Biblioscape, select **Text File** as the file type. Be sure to note where the file will be saved, because you'll have to find it again in a minute, and click **Save**.

Start Biblioscape. If you don't already have a file folder into which you want these files imported, create one. Otherwise click **File | Import...,** opening the Import Bibliographies dialogue box (*Fig. 13*). Click the **Browse** button and select the file you just exported from EndNote. Select **Tagged** as the file type and click on the scroll-down arrow to find and click **EndNote -- Refer**. In the bottom window you can select a folder for your imported refernces or they can go into the default folder, My Folder. Click **Start** and an information box will appear to tell you how many references have been imported.

Reference Manager

Start Biblioscape. If you don't already have a file folder into which you want these files imported, create one. Otherwise click **File | Import...,** opening the Import Bibliographies dialogue box (*Fig. 13*). Click the **Browse** button and select the file you just exported from Reference Manager. Select **Tagged** and click on the scroll-down arrow to find and click **RIS—Reference Manager (Ver.8)**. In the bottom window you can select a folder for your imported files or they can go into the default folder, My Folder. Click **Start** and an information box will appear to tell you how many references have been imported.

NotaBene Ibid

Start Biblioscape. If you don't already have a file folder into which you want these files imported, create one. Otherwise click **File | Import...,** opening the Import Bibliographies dialogue box (*Fig. 13*). Click the **Browse** button and select the NotaBene Ibid file you wish to import. Select **Tagged** as the file type and click on the scroll-down arrow to find and click **NotaBene Ibid**. In the bottom window you can select a folder for your imported files or they can go into the default folder, My Folder. Click **Start** and an information box will appear to tell you how many references have been imported.

Citation

Start Biblioscape. If you don't already have a file folder into which you want these files imported, create one. Otherwise click **File| Import...,** opening the Import Bibliographies dialogue box (*Fig. 13*). Click the **Browse** button and select the Citation datafile you wish to import. Select **Tagged** as the file type and click on the scroll-down arrow to find and click **Citation**. In the bottom window you can select a folder for your imported files or they can go into the default folder, My Folder. Click **Start** and an information box will appear to tell you how many references have been imported.

Obviously, it isn't possible to list every publisher of bibliographic software here, but these examples will give you an idea of how importing works. If you have references saved in a bibliographic program that is not listed here, send an email to Biblioscape at: support@biblioscape.com for details on how to import those references.

Importing from spreadsheets and databases

General principles of delimited formats

References stored in databases must be exported to a spreadsheet.

References in spreadsheets must be organized with only one type of data in each column.

Each spreadsheet column must have a heading that can be recognized by Biblioscape.

The completed spreadsheet must be saved in a delimited format text file.

Biblioscape can import delimited format files directly into your folders.

Don't be intimidated by these rules. It's not that difficult, so give it a try.

Organizing your data for export to a delimited text file

From a database

If your reference files are in a popular database such as *Access*, *Paradox, Filemaker Pro, Approach*, etc. the first step is to export the file to a spreadsheet program where you can organize the data into a delimited format with Biblioscape headings. Generally, you will create and export the file from your database program and save it with an extension used by your spreadsheet (Excel files, for example, use the extension *.xls), then open this new file from your spreadsheet program.

From a spreadsheet

In your worksheet, delete all headings and create a blank row at the top of the worksheet. This is where you will enter headings that can be recognized by Biblioscape. Check each column to be sure that there is only one type of data per column. If you have a publisher, city and year all in one column, you must separate the data so that each data type is in its own column. When the columns are complete, you can add headings in the first row of the worksheet. If you do not have a column listing the reference type (often not included in databases and spreadsheets) you should add a column and enter the reference type (book, journal, newspaper, etc.) for each row.

Following is a list of Biblioscape headings that correspond to each of the lines on the reference pages. From the list, match a heading to a column and type the heading into the top row. Type carefully. One mistake in spelling or punctuation (just like web addresses) in any heading will cause the import to fail.

The columns do not have to be in any order and you only need as many headings as you have data columns, but each heading must be correct.

Abstract	Date_input	Number	Reprint
Accession_num-ber	Date_mod-ified	Page_end	Sec_authors
Address	Date_pub	Page_start	Sec_title
Attachment	Description	Place_pub	Section
Authors	Edition	Priority	Subject
Availability	Extent_work	Publisher	Tert_authors
Call_number	File_as	Quat_authors	Tert_title
Categories	Internal	Quat_title	Title
Country	Isbn_issn	Ref_doc	Title_short
Custom_1	Keywords	Ref_ID	Type_work
Custom_2	Label	Ref_mark	URL
Custom_3	Language	Ref_misc	Volume
Custom_4	Last_post	Ref_read	Web_post_hide
Custom_5	Location	Ref_type	Work_re-viewed
Custom_6	Modified_by	Ref_type_ID	Year_pub
Date_freeform	Notes	Ref_user	

Figure 14 Field names of Biblioscape reference table

Note- Words in one heading are joined by an underline (_). Hyphens are used only to fit the table, and are not part of the heading

When your worksheet is complete, save it as a *delimited text file.* In Excel, click **File** | **Save As,** opening the Save As dialogue box. Select a directory where you will save your file and enter a name for the file that you are importing into Biblioscape. In the bottom window select **Text (Tab delimited)(*.txt)** and click **Save**.

Importing delimited files into Biblioscape

Start Biblioscape and create a new folder by clicking **References | Folder | Create Folder** and typing in a name for the new folder. Click **File** | **Import**, opening the Import Bibliographies dialogue box. Click **Browse** to find the text file you saved in Excel and click **Open**. In the Import Bibliographies dialogue box, select **Delimited** as the file type, **Tab** to separate the data fields and the quotation marks(") to surround “strings” (groups of words). Click in the **To Folder** box and select the folder that you just created. Click **Start** and watch as Biblioscape imports the information from your Excel files. When the import is complete, Biblioscape will open a box telling you how many references were imported. Click **OK** and take a look at the references you have just imported into your new file folder.

If the imported references are not correct or you received a message that only one reference was imported (this is why you created a new folder), you can delete the folder, make corrections in the spreadsheet and repeat the export to the text file and the import to Biblioscape. If the references are correct, you can move the references into your existing folders using **References | Move to Folder.**

This should be enough information to get your references into Biblioscape from most other programs in your computer. If you need help or information on how to import other programs, send an email with your request to the Biblioscape support staff at support@biblioscape.com.

The next chapter describes the Internet Module and how to collect bibliographic information from databases and libraries around the world.

Chapter 8: The Internet Module

Finding and selecting information from libraries and databases worldwide
(Go | Internet)

It's no surprise that there is a huge amount of information available on the Internet that could be valuable to nearly any research project. Finding reliable information in a usable form can be a challenge, despite all the availability. The Internet module provides the tools that help you search in some of the best places first, narrow your searches and retrieve formatted information directly into Biblioscape's references folders. The Internet module will connect you to the Library of Congress, Medline, hundreds of university libraries worldwide and help you bring back usable information. In doing all this, Biblioscape succeeds in integrating Internet research with research information management on your computer.

The Internet page also gives you direct access to the Biblioscape Web site, including general information, tech support, downloads and other helpful information.

-QuickStart-

Click **Go | Internet** to open Biblioscape's Internet page and to connect with the Biblioscape website. At the top of the page that opens (BiblioBrowser) will be a box with several headings. Select **General**, then scroll down and click on **Z39.50 Gateway to 200+ Library Catalogs**. Scroll down the page to see a list of university libraries that are available through the Z39.50 standard to see if the list includes a university library near you, then return to the top of the page to the Library of Congress area. Click on **Advanced Search** to open the search dialogue box.

As Term 1, enter the name **Einstein**, then move to the window at the end of the same line and scroll down to select **Author**. Select the operator **AND**, then as the second term, enter **relativity**, move to the window at the end of the line and scroll down to select **Title** and click **Submit Query**. You have created a query that will search for all records authored by anyone named Einstein, then restricted the query to those records that include the word "relativity" in the title.

Of the list of records you receive in response to your query, you will notice that one is authored by A.C.V Ceapa. Click on **"More on this record"** to see the full record, which reveals that Albert Einstein is listed as "Other authors". Under the Biblioscape toolbar note the message that you must open the reference to "full record", which you've just done, before capturing. Click **Capture References,** which opens a dialogue box. The central window should show the import filter as Library of Congress. If not, select that filter. Select or create a folder for this reference and click **Start**. The reference will now be in your folder.

Note that Biblioscape imports references from the Internet one reference at a time. Earlier Internet searching bibliographic software encouraged users to bring large numbers of references resulting from searches into the computer for offline sorting. Lower costs and faster Internet access now make it practical to sort references before importing them, which keeps your database tidy. In Biblioscape, you can also display large number of search results and capture them all at once.

This quick exercise gives you a glimpse of the capabilities of this module to search out and find references for your research in many corners of the world and return that information to your database in a usable form.

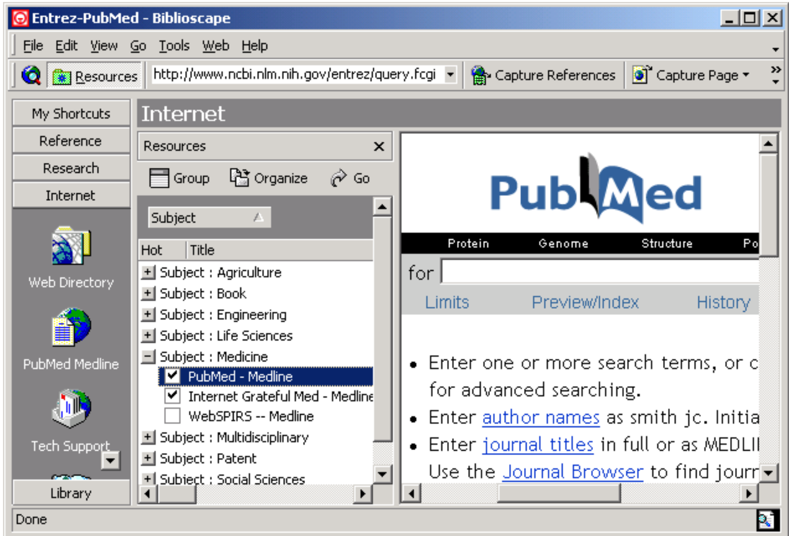
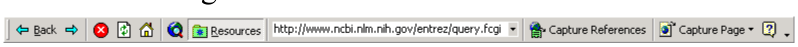


Figure 15 The Internet Module screen with Outlook Bar on left, the Resource Tree in the second column and the Biblioscape Web Directory in the main panel.

The Internet Page

From anywhere in Biblioscape, clicking **Go | Internet** will take you to the Internet page, where you will notice that the Menu bar and the Tool bar have both changed to provide you the tools you need while on the Internet. Whenever you return from the Internet page for a moment to look at a reference or other information in Biblioscape, you can return to the place on the Internet you left by clicking **Go | Internet**.

The Internet Page Toolbar



Resources – Opens a list of web resources in tree format. Although it appears as a column on the Internet page, Resources is actually a full page of information that can be viewed and edited by clicking **Web | Organize Resources**. Click on any line, and the detailed information for that line appears in the column on the right. To add a new resource, click **New** on the toolbar, then enter the information for the new resource in the panel on the right. Be sure to include the appropriate import filter so you won't have to look for it in the middle of a capture. If you expect to access this new site frequently, check the **Hot** button at the bottom of the entry.

From the column view, double click on any entry on the list to go directly to the web page for that entry.

Internet address window – Displays the address of any current site you are viewing. Scroll down to see addresses of sites you have visited recently. Enter an address here for any site you want to visit.

Capture References – When you find a reference that you want to add to your database or one of your folders, follow the instruction on the line under the toolbar, then click **Capture References** which opens a dialogue box. The central window should show the import filter for your reference source. If not, select the correct filter. Select or create a folder for this reference and click **Start**. The reference will now be in your folder.

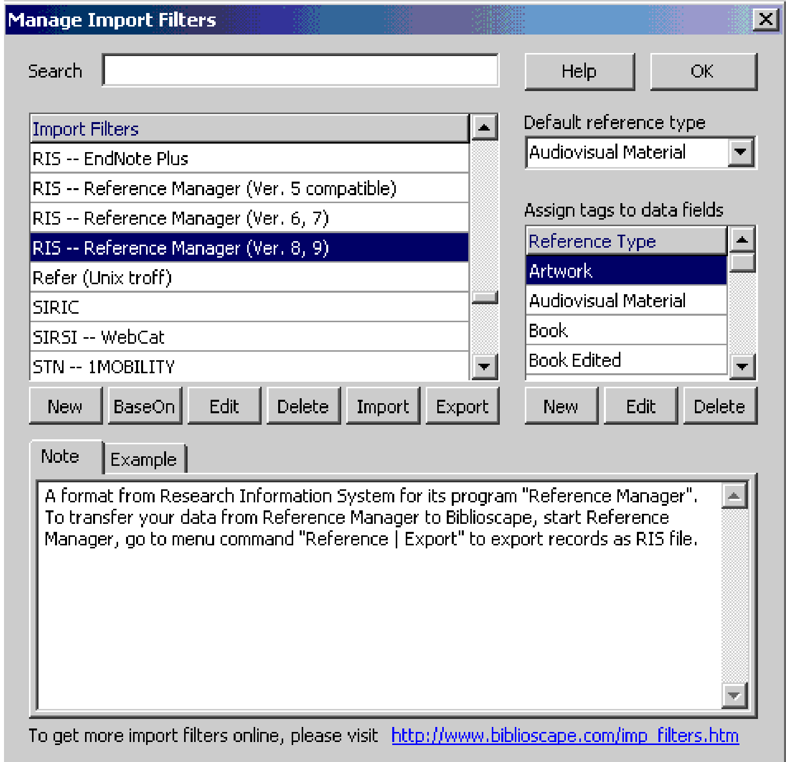


Figure 16 The Import Filter Manager, which will help you select an import filter if one hasn't already been selected.

Capture Web Page - 

If you find a web page that you want to save as a Reference or as a Note, Click on Capture Web Page, then choose As a Reference or As a Note. In both cases, after you have selected the folder and saved the page, select the file which you just saved, which will create a hyperlink to the web site.

The Outlook Bar

The Outlook Bar displays the following six icons in the Internet view:

Web Directory - Opens a page on the Biblioscape web site that provides a number of categories and descriptions that will help lead you to the sites of greatest interest:

Figure 17 Biblioscape Web Directory headings

Each of the above headings will open a list of web sites for that category. The General category includes Z39.90 links to the Library of Congress and over 200 other libraries where you can conduct searches and retrieve bibliographic information, including abstracts or full text wherever they are available. The Medicine heading links to Medline and other sites with searchable journal listings that offer tables of contents, brief article summaries, abstracts and occasionally full text articles.

PubMed Medline - Takes you directly to the PubMed page, where you can search medical journals that offer tables of contents, brief article summaries, abstracts and occasionally full text articles.

Tech Support - Includes the email address for Biblioscape Technical Support, User Forums, The knowledge Base, Frequently Asked Questions about Biblioscape, and links to downloads.

Web Help - Page of icons linking to Biblioscape Technical Support, User Forums, The knowledge Base, Frequently Asked Questions about Biblioscape, and links to downloads.

Output Styles - Provides a list of output styles, an explanation of their use and downloads for most styles.

Import Filters - Provides a list of import filters, an explanation of their use and downloads for most filters.

The Biblioscape Web Site

The Biblioscape web site has several major areas, including:

Product information and product downloads

- Names and descriptions of all Biblioscape products
- The current issue of the Bibliorama newsletters and announcements
- Information about any upgrades, patches or recommended procedures

Technical information and support

- Technical support
- Knowledge base
- Import filters, export style lists and available downloads.

Research information and support

- Web site directories
- Library lists and access
- Database lists and access

Databases

Many journals make their articles available through on line databases. Generally you will be able to access the tables of contents of past issues of the journal as well as abstracts of many articles. The full text information must usually be purchased (although there are now many free databases) either by subscription to the database or by the individual article. You may be eligible to access full text articles through a library, school, university or business that has a subscription to the service. Internet access is valuable in that you can search through a great number of articles, identify the ones you really want to read, then either purchase them on line or find them quickly at a nearby library.

Libraries

From the Internet module, you can access libraries world wide to collect bibliographic information. Simply select a library, put in your search parameters and look through the returns to see which items are going to be of interest to you.

Books – Books can be searched out by keywords and by subject matter. You can also restrict searches by date “after 1995” or “before 1776” for example. When a single word search returns too many records, add more parameters to the query until the result becomes manageable.

Authors – Author searches can be very helpful. You may read one work by a writer in your field of interest and want to see what else he or she has written. An author search may turn up newer material, very early material, books or journal articles that you would not have expected.

Journals – If your local library or a nearby university library subscribes to databases of journals, you may be able to access full text articles from those journals. Journal articles tend to have information on the latest published research data in their field, so this is where you can stay current on anything published about your area of research. Most publishers make their pages of contents and abstracts available on the Internet, so you can do preliminary research from your own computer.

As communication technology continues to improve and reliable research information on the Internet expands, the importance of the Internet page to your research can only increase.

The Internet page already provides you the ability to import complete bibliographic information from locations around the world, capture web pages and download artwork to support your research or enhance your presentations, along with music and video clips. Without question your ability to conduct, illustrate and present your research is being enhanced almost daily by the Internet.

This completes the section on putting information into the Biblioscape system. The next section will help you organize your information, then show you how to find those important pieces of information you really need to find.

Section II: Organizing your information so you can find it when you need it

It's great to have a place to store all your information, but it's very important to have it organized in such a way that you have similar information grouped together and you can find things quickly when you need them. Biblioscape folders help you group related references into folders, including smart folders that collect references according to parameters you can define. Biblioscape also offers several ways of sorting and finding information anywhere in your database.

Chapter 9: Using Folders to Organize Your References

Folders in Biblioscape work just like file folders in a drawer. You can throw all of your references of one type into the same folder and know they are together when you need them. There are a few differences though. You have a list available of everything that's in the folder all the time, and the list can be sorted and searched

You can move references between folders, put copies of one reference into multiple folders, and you can tell your dynamic folders what kind of references to collect—and they will. All of the folder pages include two panes on the right that list the references for that folder, but the activities (Create folders, set parameters, etc.) are all conducted in the column on the left.

Folders are for *your* convenience. They are easy to create and easy to throw away when you are done with them. If you are writing an essay with only a few references, put them into a folder so you don't have to sort through the other references in your database. Use this flexibility to make your work easier.

-QuickStart-

From anywhere in the References module, click **References | Folder | Create Folder,** (or click on the Reference Folder icon in the Outlook bar) which opens the Folder page. In the column on the left of the page click, on the highlighted box labeled "New Folder" and type in a name for your folder, for example, Biology. Now right click your mouse anywhere in the left column. In the menu that opens, click **Create Child**

Folder. This will be a sub-folder of Biology**,** so label it Plant. By now you can see where this leads. You can create sub-folders for any folder for as many generations as you choose.

Next, in All References, select a reference for one of your new folders (you can select additional references by holding down the Ctrl key). Click **References | Copy to Folder,** which opens a dialogue box where you can select a folder for your references. Select the folder and click **OK**. Open the folder and your references should be there.

Details are in the chapter about copying, dragging and moving as well as Dynamic and Exclusive folders.

The Folder Page

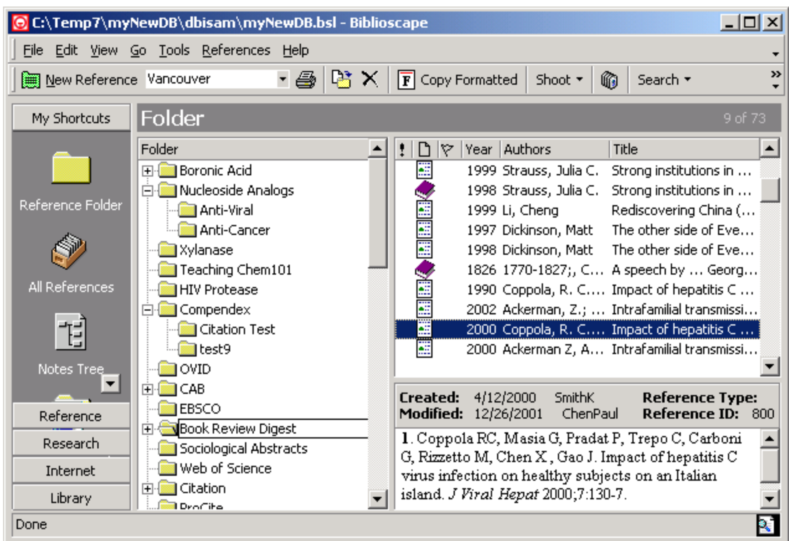
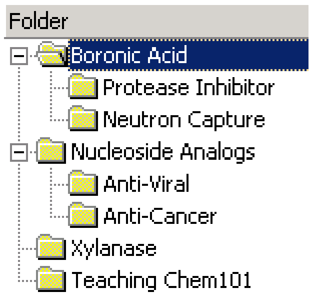


Figure 18 The Folder Page

Folders

To open the Folder page from the Reference module, you can click **References | Folder,** or you can click on the Reference Folder icon in the Outlook bar.

The Folders Tree



On the left of the Folder page is the Folder tree, which diagrams all your folders. Whenever you see a "+" sign in front of a folder, it indicates that there are subfolders ("Child" folders), which you can see by clicking on the "+"

Figure 19 The Folders Tree

Creating a folder

Anywhere *in the tree column*, Right-click your mouse to open the Folder menu and click on **Create Folder** (you can also click **References | Folder | Create Folder** from anywhere in the References module).

Creating a child folder

Anywhere in the tree column, Right-click your mouse to open the Folder menu and click on **Create Child Folder** (you can also click **References | Folder | Create Child Folder**).

Putting references into your folder

Copy – (A copy of the reference remains in the original folder)

In the source folder or the All References page, highlight the references you want to copy, holding down the Ctrl key when you click on the second and succeeding references. After you have selected the references to be copied, click **References | Copy to Folder.** A dialog box opens which lets you select the destination folder, create a new folder or create a child folder. Click on the destination folder and your references will appear there.

Drag and Drop – (The reference moves *out* of one folder and into another)

In the source folder, click on a reference you want to move and drag it into the tree column. As your cursor approaches the tree, the nearest folder will become highlighted. Move the cursor up or down the tree until the destination folder is highlighted, and release the mouse button. The reference has been moved to the destination folder.

Move – (The reference moves *out* of one folder and into another)

In the source folder or the All References page, highlight the references you want to move, holding down the Ctrl key when you click on the second and succeeding references. After you have selected the references to be copied, click **References | Move to Folder.** A dialog box will open that lets you select the destination folder, create a new folder or create a child folder. Click on the destination folder and your references will appear there.

Printing

You can print out the bibliographic information for any reference, group of references or the entire folder. Select the references by highlighting them, then click **File | Print Bibliography**. To print information for the entire folder, click **File | Print Bibliography** and click **Yes** when asked if you want to print the entire folder.

Exclusive Folders

An exclusive folder holds references that are not in any other folders in your database and cannot be moved or copied to other folders.

Any folder can be designated as Exclusive by right clicking the mouse in the left column of the Folder page, then clicking **Exclusive Folder**. When you first apply the exclusive designation to a folder any references that appear in other folders (are not exclusive) will be marked with an “F”. When you have removed the duplicate references from the other folders, right click your mouse in the left column and select **Exclusive Folder** again which will verify that all references in the folder are exclusive.

Once a folder is designated as “Exclusive”, you can move or drag references into it, but you cannot “copy” references in, as that would leave a copy in another folder.

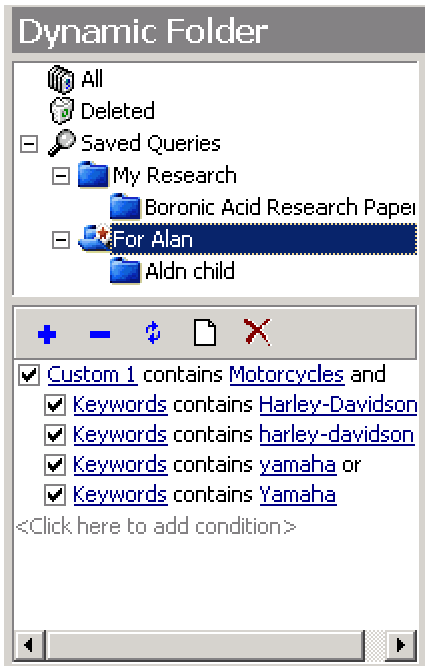
At some point in time, you may not want this folder to be Exclusive any more. To cancel the Exclusive feature, right click in the left column and click on **Exclusive Folder**.

The Dynamic Folder Page

Dynamic folders are unique, as they are folders but they are also search tools. They are, in fact, a folder that searches out all the references that are to be included in the folder.

A dynamic folder can follow "rules" or query parameters that you establish. With those rules, the Dynamic folder searches your database to find all references that meet the requirements you have set.

To open the Dynamic Folders window, click **References | Search | Dynamic Folder** or click on the blue folder in the Outlook Bar (Reference window)**.**



The Dynamic folder window presents four panes including the standard reference panes on the right and two panes on the left that contain a tree at the top showing your existing dynamic folders and a window at the bottom where you can construct or modify queries for existing or new Dynamic folders.

Figure 20 The dynamic folder pane

<u>Creating a Dynamic folder</u>

The first step in creating a Dynamic folder is to set up a "query", or a set of rules that the Dynamic folder will use when selecting references to be included in the folder. Read the instructions carefully, as this procedure will probably be different than any you are familiar with.

In the lower part of the Dynamic folder column, click on **<Click here to add condition>** then click on the word in red print, probably "Abstract". The list that drops down includes all the entries available on a Reference page. Your choices from these entries will define your query.

For example, select **Keyword** from the list, then click **<?>**, enter "nucleoside" and press **Enter**. Note that when you press Enter, the references that match your query appear in the central panel.

In effect, the query you have just entered is shorthand for "Include this reference in the folder if the <u>keyword</u> field contains the word <u>nucleoside</u>."

Repeat the process to add other conditions to your query, but notice that each time you add a condition, the word "and" is added to end the previous condition, meaning that *both* conditions must be met for the reference to be added to the folder. You can click on the operator "and", which gives you the option of changing the operator to "or". Using "or" as the operator allows the reference to be included if *either* condition is met.

When you have entered all the conditions for your query, click on the "+", and a blue folder will open in the upper part of the column. Enter a name for your folder and press **Enter**. All references that match your conditions will now be in the central pane. <u>To save the dynamic folder you have just</u>

created, click on the “update” button or it will not be saved.

As you add new references to your database in the future, each reference that meets the query of any Dynamic folder will be added to that folder. Whenever a blue folder is opened, it will list all the references that match the criteria you have established.

Folders will help you organize your research information just as you would in a file drawer, but even so, there will be times when you need to find an elusive reference. The next chapter explores Biblioscape’s searching tools, which offer several ways to find nearly anything you have saved into Biblioscape.

Chapter 10: Finding Your Information with Search Tools

(Go | References)

Understanding these search tools will make it very easy for you to find whatever you are looking for in Biblioscape, as each tool has a different approach to searching. It's important to understand that Biblioscape indexes everything that you enter into it. References, notes, abstracts, everything. When you want to find something that you've entered, you just need to know which search tool will find that type of information quickest.

In this chapter, you are working in the References module, so the search tools will search for information entered on the *reference pages*. In the References module you can search for words in the abstracts and notes that have been included in a reference page. Similar search tools are found in the Notes module for searching Notes pages

Each of the search tools can be reached from a folder or from the All References page by clicking on **Search** in the toolbar or clicking **References | Search** and selecting the best tool for your search. Note that although you can reach a search tool from a folder, searches will cover the entire database of references.

-QuickStart-

A quick search

From anywhere in the References module, click on **Search** in the toolbar or **References | Search** in the menu bar and select **Lookup**. Which opens the Lookup page. The column on the left has a window at the top that usually displays "Authors" when first opened. Below, the column lists all the authors in your database and a number indicating how many references by that author are in the database. Click the scroll arrow beside the Lookup window and you will see a listing of all the possible entries for a Reference page. Select **Keyword**, then in the small window next to the Lookup window, type the first few letters of a keyword, and you'll see it highlighted in the list below. Double click on the highlighted word, and all references with that keyword will appear in the central pane on the right.

The chapter will explain more about Lookups, Quick Search, Indexed Searches and Advanced Searches.

Lookup

Want to know which journals are represented among your references? Or how many references for any one journal? How many references by an author? And see a list of them? **Clicking Search | Lookup** provides a list of each of the lines (fields) on the reference pages – Titles, Authors, Publishers, Dates, etc. Select any item from the list and you will receive an immediate listing of all the entries for that item and the number of times that entry appears.

For example, in Lookup if you scroll down and select "Journals", all the journals that you have entered into your database will immediately be listed, along with the number of times that each journal appears in the database. If you select a journal name and double click on it, a listing of all references from that journal will appear in the main pane.

Figure 21 Lookup window

Keywords can be very easily searched with Lookup. Simply select **Keyword** from the scroll-down window, and a list of every keyword you have entered (or imported) into any of your references will be shown along with the number of references listing the same keyword.

Double click on the keyword, and those references appear in the central pane.
This emphasizes the value of putting as much information into each reference as you have available. It takes more time to enter several keywords, a category and a subject, but they will help you find exactly the information you need very quickly with Lookup.

Indexed Search of References

Biblioscape indexes every word that you enter or save into a reference, which means that you can search for any word, phrase or combination of words anywhere in your database.

The default search option under Indexed Search pane is "Fast Search". It is very easy to use and returns results fast. Just enter the word you want to search and press the Enter key. If you want to perform more complicated search with logical operators and wildcards, you can use the Indexed Search. Index Search is not turned on by default because it takes additional disk space. To turn it on, please go to "Tools | Options" in Biblioscape. On the "Database" tab, check the box "Full text live indexing".

To start an indexed search in All References or from a Folder, click in the toolbar, **Search | Indexed Search**, opening a dialogue box that works much like one for an Internet search. The results of each search appear on the Indexed Search page, where all the references containing the matching word or phrase, in any field, are listed in the central pane. In the Notes Module, you will be able to conduct identical searches of your notes in that module.

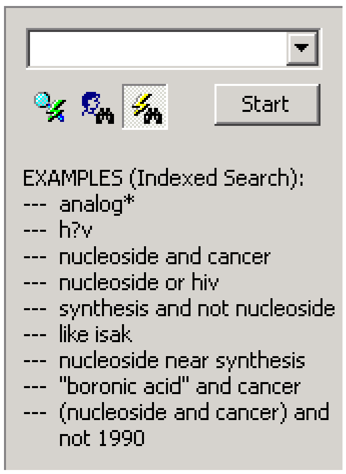


Figure 22 Indexed Search window

Biblioscape indexed searching is <u>not</u> case sensitive and supports the following types of searches

Single word	longitudinal
Multiple words in quotation marks	“longitudinal study”
Use of * for multi-character wildcards	long*
Use of ? for single character wildcards	li?e (returns life, like, lime, lite, etc,)
Use of the logical operator "and":	nucleoside AND cancer
Use of the logical operator "or":	nucleoside OR HIV
"Near" to find words that are close together	nucleocide NEAR synthesis
Use of parentheses for complicated searches	(nucleocide and cancer) not 1990

Indexed Search also offers a natural language search, which is reached by clicking on the “Smart Search” button  right under the search window. This search allows you to ask questions such as:

papers by Bowie before 1994
books about HIV
papers about nucleoside by Ishaq between 1970 and 1995

Obviously the questions must include search parameters used and understood by Indexed Search.

Advanced Search of References

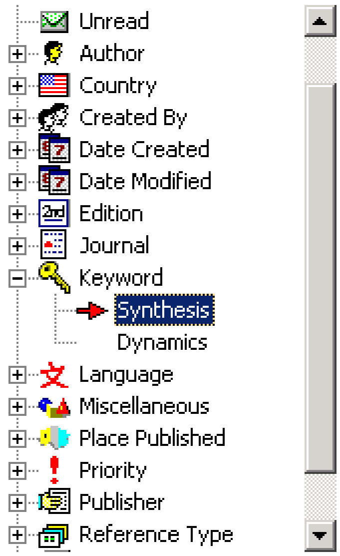
Advanced Search allows you to search multiple fields in a reference using Boolean operators. For example, you could search for all listings for a specific author before or after a specific year. To accomplish this search, you would click **Search | Advanced Search,** which opens the Advanced Search page.

In the top window of the three-windowed dialogue box on the upper left of the page, click the scroll arrow and select "Authors". In the second window, select "Contains exactly" then in the third window select the name of an author and click on the "+" at the bottom of the box. The Author's name will appear in the list area after "<Authors> contains exactly".

Next, select "Year" in the first window. You'll notice that the options in the second window have changed, so select "is more than", type 1990 in the third window and click on the "+" sign. In the list area you will see <Year> is more than "1990". Now click on Search (the Magnifying glass), and all references by the author you selected that were written after 1990 will appear in the central pane. This is a relatively simple search, but demonstrates the power of this search tool. Experiment with different combinations in the search windows to get a clear idea how this tool can help you find information you need quickly.

Quick Search of References

Quick Search is used for searches you expect to repeat often. Once you type in a search word, you can return and do the same search any time. This is important if you are adding references frequently in particular areas.



For example, click **Search | Quick Search**, and a tree of search types will appear in the left column. Near the center of the tree, click on the "+" sign in front of "Keywords", which will show two example search words under Keywords. To add a new search word, with Keywords highlighted, go to the bottom of the window and click on the"+" sign. Under Keyword, you will now find an arrow with the message "Type your Glance here". Type in a keyword. When you click on the new keyword, all references in your database with that keyword will be listed in the central panel.

Figure 23 Quick Search tree

The following steps apply throughout the Quick Search tree:

- Select and click on a search category
- Click the "+" sign to see listings in that category
- Add or delete listings using the "+" and "-" signs at the bottom of the window
- Change a listing by clicking it, clicking the refresh button at the bottom of the window and typing in the listing space.
- Click on a listing to see all references containing that listing.

Saving a search

The result of any of these searches is a list of references in the central pane of the page. If you want to save the search, you can click **Edit | Select All**. Next, click **References | Move to Folder**. When the Move Items dialogue box opens, select a folder or create a new folder for the references you have found in your search. If you want to perform the same indexed search again, you can click on the drop down arrow and select an old search term. Biblioscape keeps the last 20 search terms used for easy access.

Dynamic (Blue) Folders

Dynamic folders are both a folder and a search tool. They are covered in the previous chapter about folders.

Once again, all these searches are based on the information you have entered for each reference. If you have an important reference, but have not entered any keywords, you won't find that reference with a keyword search. That's the end of the nagging about entering lots of reference information – for this chapter.

Chapter 11: The Tasks Module

(Go | Tasks)

The Tasks module is a simple To-Do list manager that is integrated with the Notes and References modules. You may already be asking “Why do I need another To-Do list?”, but the concept here is really pretty sound.

This is a task manager exclusively for your research, not to remind you of birthdays and anniversaries, but to help you keep your research on track and on schedule. Anyone who is conducting research knows that a little structure is very helpful, and this module provides some help with structuring your time.

Quick-Start

To open the Tasks module, click **Go | Tasks** (or on the Outlook Bar click **Research** and click on the Tasks icon). The cursor will appear at the top box of the right column (labeled Task) where you can enter the name of your task. Only the first few words of the title will appear on the task list, so it's a good idea to get the important identifying words at the front of your title.

Move down to the next box, Priority, to set the priority for this task. If you set the priority as High, an exclamation point will appear in the first column of your task list. In the next box you can describe your task in as much detail as you like.

In the Project box, you can enter the project to which this task is related. For example a task might be to create an illustration or a chapter for a larger project such as a dissertation, article or book. Next, Biblioscape will automatically enter today's date as the Start Date, but you can change that as appropriate, then enter a completion date in the next box.

Add any helpful notes in the Miscellaneous box and move down to the Status box. Click on the line then click the arrow and select the status of the task. Move down to the "% Complete" box where you can enter a number representing the percentage of the task that has been completed. When you complete a task, check the Completed box in the Progress area.

Now look at your task list. All the tasks you have entered are listed here, probably in the order you entered them. If you click on the Task heading, your tasks will be sorted into alphabetical order, which probably is not very helpful in most cases, but if you click on the Due Date heading, your tasks will be listed by due date, which should be very helpful.

The Tasks Page

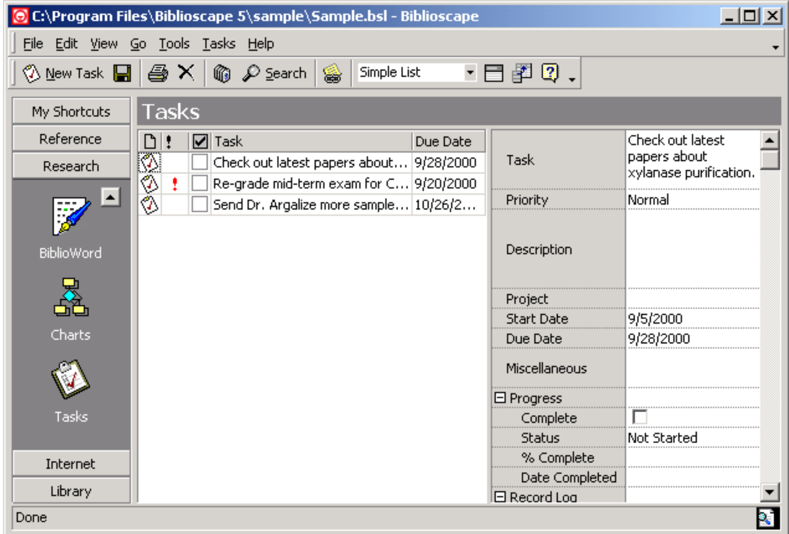


Figure 24 The Tasks Page

The Tasks Page is divided into two parts:

> On the left side of the page is a list of tasks that have been entered and their due dates. This list can be sorted either by due date or alphabetically by task.
>
> On the right side of the page are the details for any selected task. This is also where you will enter information for any new task.

Creating a new task

To enter a task on the Task Page click **New Task**, 

which will open a blank line in the Task list and a blank form in the column on the right. The spaces where information can be entered into the form include:

Task -- this is the title of the task, and will appear in the listing. It's a good idea to put the most important identifying words at the front of the title, as only the first a few words will appear in the list. By putting the important words at the front, a glance at the list will tell you immediately what that task is.

Priority -- the default priority is Normal, but clicking on Normal opens a drop-down menu that includes Low and High as priority choices. If you select High, then a red exclamation point will appear in the first column of your task list.

Description -- in this space you can enter a detailed description of the task.

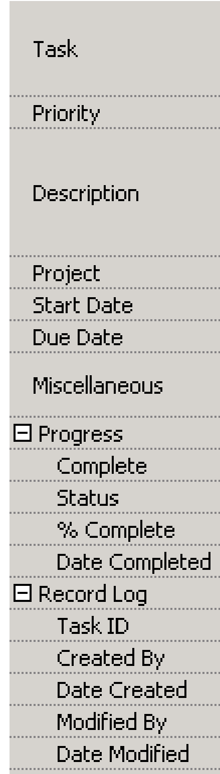


Figure 25 The Task Column

Project -- in many cases your task will be part of a larger project. The task may be to complete a chapter or a section in a report, article, book or other document, and you may have several tasks listed for any project. You can group tasks by project in the Tasks list.

Start Date -- the default start date is the date you enter the information into Biblioscape. If you started work on the task earlier, you can enter the actual starting date or if you plan to start the task later, enter that date. For a calendar, click the arrow at the right of the line.

Due Date -- enter the date when you want this task to be completed. To display a calendar, click the arrow at the right of the line.

Miscellaneous -- this is the place where you can put anything of interest, or nothing at all.

Progress

Complete -- click in the box when the task has been completed.

Status -- the default is "In Progress". Other alternatives include - Not Started, Completed, Waiting on someone else and Deferred. Click on whichever answer is appropriate. A different value can be selected anytime in the future.

% Complete -- enter the percentage of the task that has been completed. This value can be updated at any time.

The Task List

There are several different views available of the task list, the default being the Simple List. At the window in the toolbar click the arrow to open the drop-down menu that will list all the views:

Simple List - Includes the following columns

- Priority
- Icon
- Check box
- Title
- Due date

Detailed List **-** Includes the following columns. It's easier to view all these columns if you close the Outlook Bar.

Priority
Icon
Check box
Title
Status
Due date
% Complete

By Icon - This feature is to be added in the future and is not available at the time this was being written.

By Priority **-** The simple list with tasks ranked by priorities- High, Normal, Low.

By Project **-** The simple list with tasks grouped by their projects.

By Status **-** The simple list with tasks ranked by status.

Printing your task list

Printing your task list will be just a little different from the usual method. Clicking on either the Printer icon or **File | Print** will take you to your browser, where you will click either the printer icon or **File | Print** again, which will produce the printed task list.

Deleting a task

To delete a task, highlight the task in the Task List and click the delete button in the tool bar or press the delete key.

Linking your tasks to Notes

There may be times when you want to link a task to a note, possibly as a reminder. To create a link, highlight the task and click on the Link to Note icon  in the tool bar. The Link to Note dialogue box will open, displaying your Note tree. Select the note to which you want to link your task and click Link at the bottom of the dialogue box. The selected task will now appear on the Links page of the note you selected.

In Section III, you will be shown how to add citations, footnotes and bibliographies to your papers and articles.

The Tasks Module is a practical addition to a research information manager. It is very easy to begin a research project without taking the time to break it down into its component tasks. This feature of Biblioscape encourages you to think about the individual tasks involved in a project and the time period in which you must complete them.

Section III: Adding citations, notes, and bibliographies to your paper, article or book

For many writers, the ability of software to simplify the complex process required to create and format citations, footnotes and bibliographies is the primary reason for owning or using bibliographic software. Biblioscape includes a broad array of features to simplify and organize these tasks including:

*BiblioWord, an integrated and fully featured word processor that supports drag and drop citations on the same page your text is being created.

*Full integration with your word processor by adding Biblioscape to the menu bar or activating BiblioSidekick.

*An extensive list of integrated bibliographic styles, including widely used styles for all writers (MLA., Chicago, APA etc.) as well as over 200 journal or institution specific styles plus a style editor for creating new styles. Additional styles are available at Biblioscape.com.

*Simple insertion of citation markers or tags into your resident word processor.

*Optional "natural citation" entry allows you to write on any computer, then complete formatting of your work on the system or computer where your Biblioscape database is installed.

*The ability to format in text or HTML files.

There are a few things you should understand about using Biblioscape that apply to all word processors, including BiblioWord:

> It will simplify your work if all the references for writing project are in one database, as Biblioscape can only search and format one database at a time.
>
> When you instruct Biblioscape to place a citation in your text, the entry you will actually see is a temporary citation, or a “Tag”. The actual formatted citation will be inserted at the time you select a documentation style, format the document and create a bibliography.

Chapter 12: BiblioWord

(Go | BiblioWord)

BiblioWord is a full-featured word processor designed specifically for writers who want to include citations in their text and bibliographies or reference lists at the ends of research papers, chapters, articles or books. BiblioWord is fully integrated with all the modules in Biblioscape, so you can easily select or change folders, add illustrations from charts and refer to your notes while composing your document in BiblioWord.

-QuickStart-

Opening BiblioWord

For a quick look at how citations can be entered and formatted, open one of your documents in BiblioWord by clicking **Go | BiblioWord**, which opens a word processor page in Biblioscape. You will see a list of references from the current database arranged down the right side page. Now open one of your existing (.txt or .rtf only) documents by clicking **File | Open** (or the icon) and selecting your document file. If the Outlook Bar is open, this makes this page a little crowded, so click **View | Outlook Bar** to make a little more space.

Inserting a citation into your document

In your document, place the cursor wherever you wish to insert a citation. Select a reference from the column on the right of the page, click and drag it to the insertion point, release the mouse button and a citation tag will appear. Notice that this is not a formatted citation and is not what will appear in your final paper. This is a tag that tells Biblioscape which reference to insert and where to put it.

Selecting a document style and creating a list of references

You have now inserted one citation into your paper and can continue the same process until you have inserted unformatted citation tags wherever they are needed. You're now ready to format the paper into the appropriate document style and to create a list of works cited or a bibliography. Go to the Style window in the tool bar. Click the scroll arrow on the right of the window to see the various document styles that are available in Biblioscape. Select **MLA** and click **Format Document** on the tool bar.

All the citations in your document should now be properly formatted in the MLA style, and all the references should be listed alphabetically at the bottom of the page. Simply add a title such as "Bibliography" or "Works Cited" and your paper's complete. But, before you move onto something else, click on **Unformat** in the tool bar. This returns your paper to temporary citation tags in case you want to change to a different document style. When you're done working with this document, click on the **Save** icon then **File | Close**. You can also click **View | Outlook** to restore the Outlook Bar to your screen. Wasn't that easy?

The BiblioWord Page

One of the first things you'll notice when you open BiblioWord from anywhere else in Biblioscape is that the menu bar and toolbars have changed. The menu bar has added Format, Table and Bibliography. In addition, there are two new toolbars that look like they belong in a word processor program, which is right. BiblioWord is a complete word processing program within Biblioscape, and it has a few very special tricks to help writers.

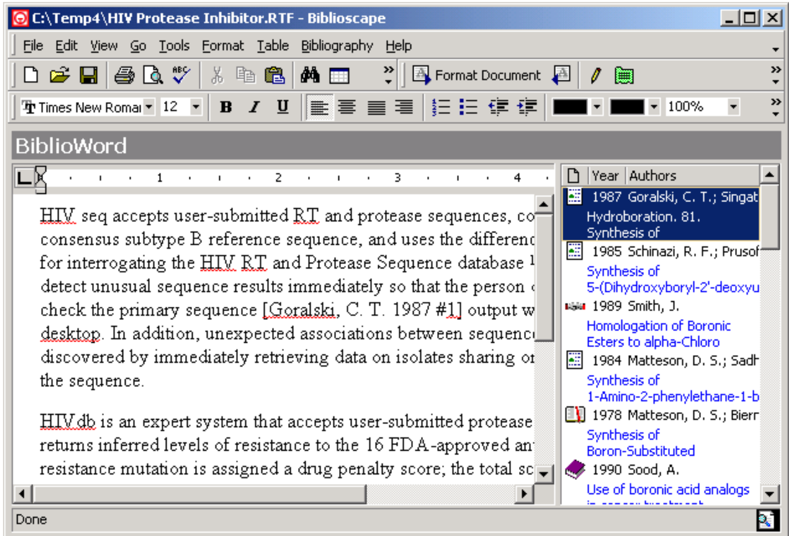


Figure 26 BiblioWord Page

The reference list

Probably the most important new feature for you on this page is the column on the right side of your screen, which appears to be a “squeezed in” version of your All References page and, in fact, it is. BiblioWord combines your word processor with your list of references in order to create instant citations. This column can display your entire database or simply list the contents of one folder. To limit the list of references in the column to the contents of one folder, select and open a folder, then return to BiblioWord. The references for the selected folder will now appear in the reference column.

Sorting References 

In the reference list header, you can click on the Category Icon, Year or Author to sort the column in ascending order. A second click will re-sort the list in descending order. This will help you find your references quickly.

Reference details

To see the reference page for any reference in the list, double click on the reference.

Changing reference sources

The references included in the reference list are those of your active folder. You can change folders at any time by clicking on the Reference Folder icon in your Outlook bar. Just select the folder you want and return to BiblioWord by clicking **Go | BiblioWord**, which returns you to your document.

Hiding the reference list 

When you are working in BiblioWord, you can turn the reference list Off or On by clicking the **Reference List** icon in the tool bar. You can also open additional working space on this page by clicking **View | Outlook Bar** to turn off the Outlook Bar.

The document panel

One of the unique features of BiblioWord is that whenever you are working in a document, you can leave the document to go anywhere in Biblioscape, then return to the same place in your document.

Working with documents

You can use BiblioWord the same way you use your word processor. You can create a new document in BiblioWord and type or dictate directly into it. You can open an existing Text or Rich Text Format document into BiblioWord or you can copy and paste from any document into BiblioWord. Toolbars and formatting are very similar to Word, but Word documents must be converted to Rich Text Format before importing into BiblioWord.

Documents can be saved (**File | Save Document**) in rich text format (***.rtf**), which can be read by most word processors.

Paragraphs and fonts can be formatted using icons in the tool bar or by clicking **Format** in the menu bar. The page can be formatted for printing by clicking **File | Page Setup** and can be printed by clicking **File | Print**.

Inserting citations into your document

Drag and drop
Click on any reference in the reference list and, holding your mouse button down, drag the reference onto the main page to a point in your document where you would like to insert a citation. When you release the mouse button, you create a temporary citation, or a "tag". Tags simply tell Biblioscape where to put a citation and which reference to use when the document is formatted later. As you can see, this method makes it very simple for you to "cite while you write".

Using the Insert Temporary Citation button 
In your reference list, click on a reference to highlight it, then move your cursor into the document and click on the point in the document where you want to insert a citation. Move the cursor to the tool bar and click on the "Insert Temporary Citation" button and your citation tag will appear at the point you selected.

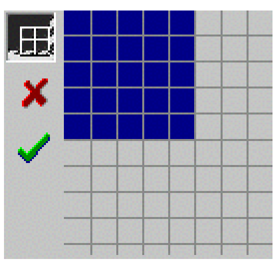
Why tags?

When you complete your document, you will select a "style", and Biblioscape will format the document in that style. Okay, you're probably wondering why bother with tags, why not format as you go? The answer is simple. The tags tell Biblioscape exactly which reference is being cited. No matter how much you change the document around before it's finished, Biblioscape will find the tags and insert the correctly formatted citations in the style which your specify.

Sometimes, you will want to send a document (paper, article, manuscript, etc.) to more than one publication. If the publications require different styles, Biblioscape can re-format your paper into a new style with just a few clicks.

Adding a table to your document

On your document, click the point where you wish to insert a table. In the menu bar, click **Table | Insert Table** to see the Table work pad. Now you have to decide how many rows and how many columns you want in your table.



For example, to create a table with 5 rows and 4 columns, move your cursor down 5 rows then across 4 columns of the work pad and click on the *outside corner* of the square at that position. Try this a few times at different points in the work pad to get a feel for where your cursor marks the table size.

Figure 27 The Table work pad

When the squares marking the size of your table turn blue, a green check-mark appears to the left of the table. When the table in the work pad is the right size, click on the **Green Arrow** and a table will appear in your document where you placed the cursor.

Simply fill in the blank squares until your table is complete.

Styles of Documentation

There are hundreds of different styles that can be used to document and acknowledge the work of other writers. Many scientific publications have their own style requirements Some universities have styles established for use by their students, and there are a number of broadly accepted styles including MLA (Modern Language Association), APA (American Psychological Association) and CMS (Chicago Manual of Style – often referred to as simply "Chicago"). If you are writing for publication, the editor will guide you as to the required style. Style requirements assure uniformity in a publication.

Biblioscape lets you select (or even create) appropriate styles for your documents and inserts citations wherever you need them. Biblioscape then correctly formats the citation, bibliography, references or footnotes in whichever style you select, and gives you the opportunity to reformat the document in a different style at any time. No concerns about what to underline or italicize or where to put commas and periods. Biblioscape does it all.

Formatting your document

Selecting the style 

Whenever you are in either the References module or the BiblioWord module, there will be a window in your toolbar where you can select a style for your document. Click the scroll arrow to the right of the window to see the style choices. Click on the style you want, and that will remain the current style until you change it.

Formatting your document 

When your document is complete and you are ready to format the citations and create your bibliography, click on the **Format** button in your toolbar. Immediately, all your citations will appear in the style you have designated, and a list of references will appear at the end of the document. You can change the title from References to “Works cited” or whatever is required for your document.

Creating bibliographies

As described above, bibliographies are created when you format your citations, and will appear at the end of your document whatever its size. If you prefer to have lists of references at different intervals (chapters, for example), you should create separate documents for each chapter and your reference lists will appear when you format the chapter.

Stand-alone bibliographies

To print a bibliography without printing a document, go to the folder containing the references, highlight the references to be included then click **File | Print Bibliography**. You can also print the bibliographic information for the entire folder or an entire database by clicking **File | Print Bibliography** from the folder or database and clicking **Yes** when asked if you want to print the entire folder.

The next chapter explains how Biblioscape works with your present word processor, as is common in other bibliographic programs. The concept of bringing the word processor *inside* the software is a very practical approach, and obviously works very well with BiblioWord.

Chapter 13: Add Citations and Bibliographies to your Word Processor Documents

Biblioscape can be used to enter citations and create bibliographies in nearly any word processor, and can even be used to produce a single formatted document from one that has been created on multiple word processors. A very helpful utility that is compatible with most word processors, BiblioSidekick, can be activated to place the your database or folder of references on one side of your document page. In the case of two very popular programs, WordPerfect and MS Word, Biblioscape tools can be integrated into the program toolbars.

You'll find it helpful to understand the different types of citation forms you can use in Biblioscape.

Temporary Citations – This is the form you will probably use most. It is the default form in Biblioscape and will include a number that identifies the specific reference. When you format your document, which might be much later, even if you have several references by the same author, Biblioscape will cite the correct reference. A temporary citation also allows you to choose the style format at the time you format the document. A temporary citation might look like: [Meadows, Donella H.1992 #2153].

Formatted Citations – Formatted citations are often used in footnotes. The style must be selected before the formatted citation is copied, as it will remain exactly as entered into the footnote when the rest of the document is formatted. Formatted citations can also be used in documents, letters for example, where you want the reader to have the bibliographic information, but will not add a bibliography.

Natural Citations – If you work on a single document from multiple computers, you should use Natural Citation – a citation without an identifying reference number. Biblioscape uses the text you entered in Natural Citation to identify the reference you want to cite. If Biblioscape finds more than one reference that matches your text, you will be prompted to pick the correct one. Since Natural Citation does not rely on the reference number, there will be no conflicts.

-QuickStart-

From a document in your word processor, switch to or open Biblioscape, then open the folder containing the references you want to cite in your document. Click on a reference to highlight it, then click on **Copy Temporary** in the toolbar. Switch back to your document, click at the point where you want the citation to appear and click on the **Paste** icon in your word processor. The temporary citation will appear at the point you marked with the cursor. Repeat this to add temporary citations throughout your document.

When you have added all the temporary citations to your document, save the document as an .rtf file (Rich Text Format). In Biblioscape, click **Tools | Format Manuscript**, which opens the Format Manuscript dialogue box. Click on the **Browse** button and select the .rtf file you just saved, which will appear in the Input File Window. Notice that the file name also appears in the Output File window, but with a "+" sign added to the name. This is the file you must open to see your formatted document.

Select a formatting style such as MLA in the Using Style window, leave the File format at RTF (unless you plan to publish the document on the web) and click **Start.** In your word processor, open the formatted document (the one with the “+” sign).

This process should work with any word processor that recognizes the RTF format, which includes most word processors.

Adding citations to your word processor document

You can add citations to a document (paper, article, book, etc.) as you write, or you can add them to a completed document

Three ways to add citations

<u>Copy a Temporary Citation</u> 

From a document in your word processor, switch to or open Biblioscape, then open the folder or database containing the references you want to cite in your document. Click on a reference to highlight it, then click on **Copy Temporary** in the toolbar. Switch back to your document, click at the point where you want the citation to appear and click on the **Paste** icon in your word processor. The temporary citation will appear at the point you marked with the cursor. Repeat this to add temporary citations throughout your document.

<u>Shoot a Temporary Citation</u> 

In a document in your word processor, place the cursor at the point where you want to insert a citation, then switch to or open Biblioscape. Open the database or folder containing the references you want to cite in your document. Click on a reference to highlight it, then click

Edit | Shoot | Shoot Temporary. The temporary citation will appear in your document at the point you marked with the cursor. *Note* -If you are going to "Shoot" citations very often, you can click **Tools | Customize | Command tab** and select **Edit**. In the window on the right, scroll down to Shoot Temporary Citation and drag the icon up to the tool bar. Now you can shoot citations with one click.

Drag citations in with BiblioSidekick
BiblioSidekick is a *very* handy utility which will pop up on your word processor with one click, allowing you to sort through your folder or database, select a reference and drag the temporary citation into the place you want it in your document. This works with nearly any text document or program, even e-mail. BiblioSidekick is probably different than anything else you've used, but it's well worth the few minutes it takes to learn to use this handy utility program.

To open BiblioSidekick, click **Start | Programs | Biblioscape | Biblio-Sidekick** or click on your desktop icon. BiblioSidekick will appear in a pane (which can be easily moved or re-sized) on your document. Select a reference and drag it to the point where you want the citation inserted in your document and release the mouse button. When you have entered your citations, you can re-size or minimize BiblioSidekick until you need it again. An interesting fact, you do not have to have Biblioscape running to use BiblioSidekick.

Using "Natural" Citation

If you work on a single document from multiple computers, or cite from multiple databases in one computer, you should use Natural Citation – a citation without an identifying reference number. You can use first author name, year published, and part of the title as your natural citation text after the "#" symbol. Biblioscape uses your natural citation text to uniquely identify the reference you want to cite. Since Natural Citation does not rely on the reference number, there will be no conflicts. When you format your document, Biblioscape will ask you to choose between any questionable reference choices (two or more references by the same author in the same year) before formatting the document.

To set Biblioscape for Natural Citation, click **Tools | Options**. Select the **Format Manuscript** tab and check the box (last on the page) that says" "Use 'File As' instead of 'Reference ID' for Temporary Citation". In this mode, you can use any of the methods shown above for inserting citations into your document.

Styles of Documentation

There are hundreds of different styles that can be used to document and acknowledge the work of other writers. Many scientific publications have their own style requirements and there are a number of broadly accepted styles including MLA (Modern Language Association), APA (American Psychological Association) and CMS (Chicago Manual of Style – often referred to as "Chicago"). If you are writing for publication, the editor will guide you as to the required style. Style requirements assure uniformity of appearance in a publication.

Biblioscape lets you select (or even create) appropriate styles for your documents and inserts citations wherever you need them. Biblioscape then correctly formats the citation, bibliography, references or footnotes in whichever style you select, and gives you the opportunity to reformat the document in a different style at any time. No concerns about what to underline or italicize or where to put commas and periods. Biblioscape does it all.

Formatting your document and creating a bibliography

When you have added all the temporary citations to your document, save the document as an .rtf file (Rich Text Format). In Biblioscape, click **Tools | Format Manuscript**, which opens the Format Manuscript dialogue box. Click on the **Browse** button and select the .rtf file you just saved, which will appear in the Input File Window. Notice that the file name also appears in the Output File window, but with a "+" sign added to the name. This is the file you must open to see your formatted document.

Select a formatting style such as MLA in the Using Style window, leave the File format at RTF (unless you plan to publish the document on the web) and click **Start.** In your word processor, open the formatted document (the one with the "+" sign). Your citations will all be formatted in the style you selected, and you will find a list of references at the end of the document. You can change the title from References to "Works cited", "Bibliography" or whatever is appropriate for your document.

As described above, bibliographies are created when you format your citations, and will appear at the end of your document whatever its size. If you prefer to have lists of references at different intervals (chapters, for example), you should create separate documents for each chapter and your reference lists will appear when you format the chapter.

Stand-alone bibliographies

To print a bibliography without printing a document, go to the folder containing the references, highlight the references to be included (hold down the control key to select more than one reference) then click **File | Print Bibliography**. You can also print the bibliographic information for the entire folder or an entire database by clicking **File | Print Bibliography** from the folder or database and clicking **Yes** when asked if you want to print the entire folder.

Linking Biblioscape to the Microsoft Word toolbar

You can add Biblioscape tools to your Word toolbar using the following procedure. At first this may look complicated, but it isn't that difficult. Just follow the steps and be impressed with your success.

<u>First – Find Biblioscape files in your computer</u>
In most cases, you can go directly to the file by clicking **My Computer | [C:]** | **Windows** | **Program Files | Biblioscape 4 | Tools**. In the Tools folder, you will find that one of the icons is labeled "Bib_Word". Highlight **Bib_Word** and click **Edit | Copy**, then follow the procedure below. If you can't find the Biblioscape files, use the **Find** Utility in your **Start** list or contact Biblioscape technical support.

<u>Linking to Microsoft Word</u>
If you have Word installed in Microsoft Office, go to **My Computer | [C:] |Windows | Program Files | Microsoft Office | Office | Startup** (you're clicking on file folders through most of this). Click on the white space away form the icons, then click **Paste**. The Bib_Word icon will appear. The next time you open Word, Biblioscape will appear on the toolbar.

If you have a stand-alone version of Word, the procedure is a few steps shorter than above. On the Desktop click

My Computer | [C:] |Windows | Program Files | WinWord | Startup (you're clicking on file folders through most of this). Click on the white space away form the icons, then click **Paste**. The Bib_Word icon will appear. The next time you open Word, Biblioscape will appear on the toolbar.

The advantages of linking to Biblioscape through the toolbar are that you can:

Search for a reference using logical operators
Format your document directly
Unformat your document directly

The combination of linking Word to Biblioscape through both the toolbar and BiblioSidekick offers a great deal of power and flexibility.

Biblioscape also provides links to WordPerfect and other programs. For detailed information, in Biblioscape click **Help | Biblioscape on the Web | Support,** which will connect you with Biblioscape's technical support

The next section will introduce Biblioscape's library management system. You will find this system very helpful for managing a research library, whether the library is large or small.

Section IV: Organizing your books, journals, and other publications into a library

It's an obvious question, "Why include a program to organize a library with your bibliographic software?" The answer is pretty easy. A lot of people who are doing research are accumulating sizable libraries. Yes, this includes corporations and sizeable research groups, but even individuals can accumulate enough books and journals to benefit from the organizational structure a library provides. You'll also benefit from the fact that not only can you find a specific reference in the References module, you can also find the original publication if it is in your library.

And, if you ever lend books to friends or fellow researchers, this system will tell you where your books are. It will also help you remember from whom you borrowed, where you bought books and when your subscriptions to journals and magazines are due.

Chapter 14: The Library Module

(Go | Library)

The Library Module includes seven key pages:

- The Catalog Page – enter and view information for each catalog item (books, serials, etc.) here.
- The Serials Page – displays information about serials; journals, magazines, newspapers, etc.
- The Circulation Page – all library catalog activities; check-out, check-in, renew, etc. are entered and displayed on this page
- The Interlibrary Loan Page - activities between libraries are recorded here
- The Borrowers Page – enter and maintain data about borrowers
- The Lenders Page – enter and maintain data about lenders
- The Suppliers Page- enter and maintain data about suppliers

You'll find the Outlook bar very helpful in this module as it offers you the quickest way to move from page to page.

-QuickStart-

Most of us think of a library as a place to find books, so a logical place to start with the Library Module is to put some books into the catalog.

Building the catalog

Since you have already created a database of references and presumably included several books, a first step is to search your References database for books that you want to add to your library. In References, open the All References page and click on the heading for the Icons column to sort the references and bring the symbols for books together in the column. Click on the first book you would like to add to the library, then press on the control (**Ctrl**) key and hold it down while you click on each of the books that you want to add. When you have selected all the books from the database that you want to put into the library, click **References | To Other Modules | Copy to Catalog**. Now look at the catalog page. Instant library!

If you look at the column to the right of the page you'll note that all the information you have for each book has been copied into the library catalog, including notes and abstracts. Keywords appear in the “Subject” space. You can also add books individually by clicking **New Item** and entering the information into fields in the column.

Adding Serials to your library

Serials are publications that are produced at regular intervals such as magazines, newspapers, journals and even some books (annual directories for example) The first step in adding serials to your library is to click **New Item** on the Catalog page, select **Serial** as the reference type in the data column on the right, then scroll down to the heading “serial” and click on the Serial Type line. Select from:

Book series
Journal
Magazine
Newspaper
Newsletter

Fill in the general and subscription information for your serial in the balance of the Serial section, then click the

Serials icon in the Outlook Bar or click **Library | Serials** in the menu bar, to display the Serials page. Here you can enter the individual issues of each serial. You will see a listing of the serials you have entered displayed on the left of the Serials page. Click on one, then click the **New Issue** icon which will open the window in the lower right of your screen. Enter the Volume (for journals) and the issue date and other appropriate information for one issue, then click the **New Issue** icon again. The information you entered for one issue now appears in the listing at the top of your screen. In this way, you can list all the issues for each serial in your library.

Borrowers, lenders and suppliers

There are sections for entering the names, addresses and other information for borrowers, lenders (interlibrary loans) and suppliers that can be accessed from **Library** on the menu bar or from their icons on the Outlook Bar. These are pretty straightforward and self- explanatory. Click **Library | Borrowers** to open the Borrowers page, click **New Borrower** in the toolbar and enter your own name as a borrower in the first field in the column on the right.

Checking books in and out of your library

If the Outlook bar is open, click the **Circulation** icon then click **Check Out** on the toolbar, otherwise start with **Circulation** on the Menu bar.

To enter a borrower's name, click the arrow on the Borrower window and select your name (which you entered two paragraphs back). To enter a book title, select the title in the title window, confirm the due date and click **Check Out.** When a book is returned, use the **Check In** box and enter the book title.

That simple. You now have a complete library system that can handle a few bookshelves or a sizeable research library. More details will be covered in the chapter, but this quick look at the Library module will give you an understanding of its substantial capabilities.

The Catalog Page

The initial information that is entered for a book or other item on the Catalog page is the same as the information you entered on the Reference page, so the two pages exchange information easily. New or added information for this page is entered into the column on the right.

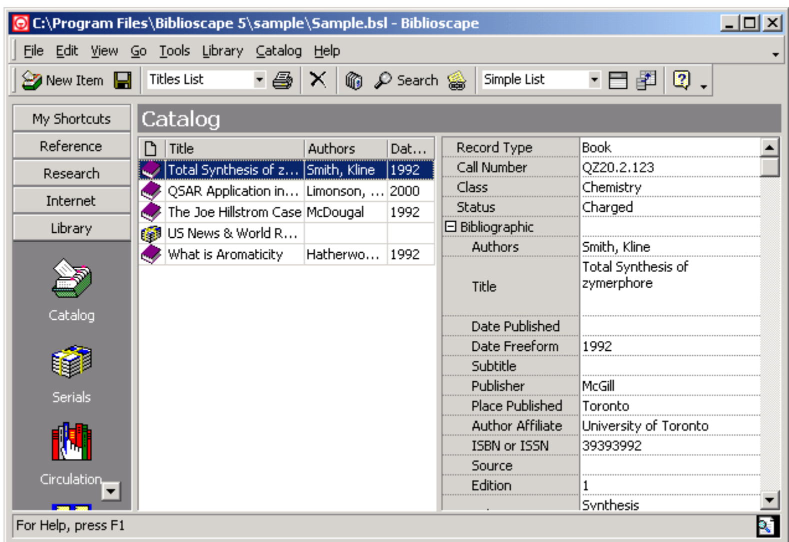


Figure 28 The Catalog Page in the Library Module

The center panel is a list of publications in the catalog and the column on the right shows reference information for each publication. The Outlook Bar on the left holds icons for each of the major sections of the library.

Copying references into the catalog

To copy references from the Reference module to the Catalog page, go to the folder or database which contains the references you want to add to your library. If these will all be books, sort the columns so that all the books are grouped together, then select one book. Click on the first book you would like to add to the library, then press on the control (**Ctrl**) key and hold it down while you click on each of the books that you want to add. When you have selected all the books from the database or folder that you want to put into the library, click **References | To Other Modules | Copy to Catalog**.

Entering new items into the catalog 

On the Catalog page toolbar, click **New Item** In the column on the right of the page, click on the first line and select the record type, then fill in each of the fields under "Bibliographic" for which you have information.

Entering information for a serial into the catalog

The first step in adding serials to your library is to click **New Item** on the Catalog page, select **Serial** as the reference type in the data column on the right, enter the name of the publication as "Title", add the name and location of the publisher, then scroll down to the heading "serial" and click on the Serial Type line and select from:

Book series
Journal
Magazine

Newspaper
Newsletter

Fill in the general and subscription information for the serial in the balance of the Serial section,

Searching the catalog

On the Catalog page toolbar, click **Search,** 

opening the Search Catalog dialogue box. In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Catalog screen will clear, then all items matching your search terms will appear in the central pane. If the screen remains blank, there are no matches.

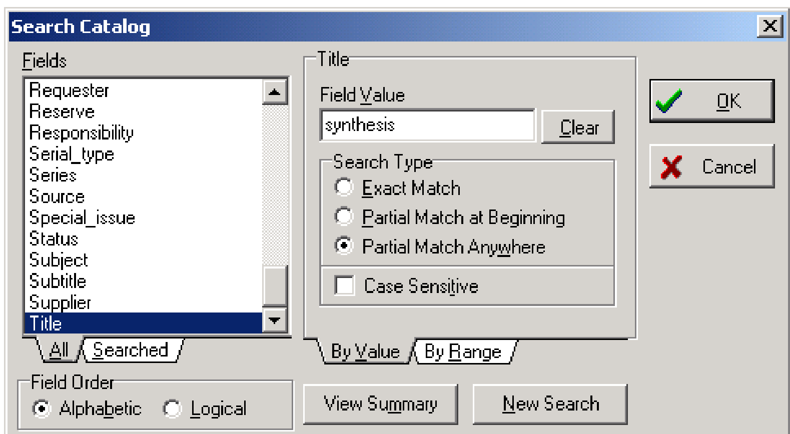


Figure 29 The Search Catalog dialogue box

To return to the view of all items in the catalog, click the Retrieve All icon in the tool bar.

The Serials Page

Serials are publications that are produced at regular intervals such as magazines, newspapers, journals and even some books (annual directories for example). The Serials Page stores information that will help you manage your serials collection.

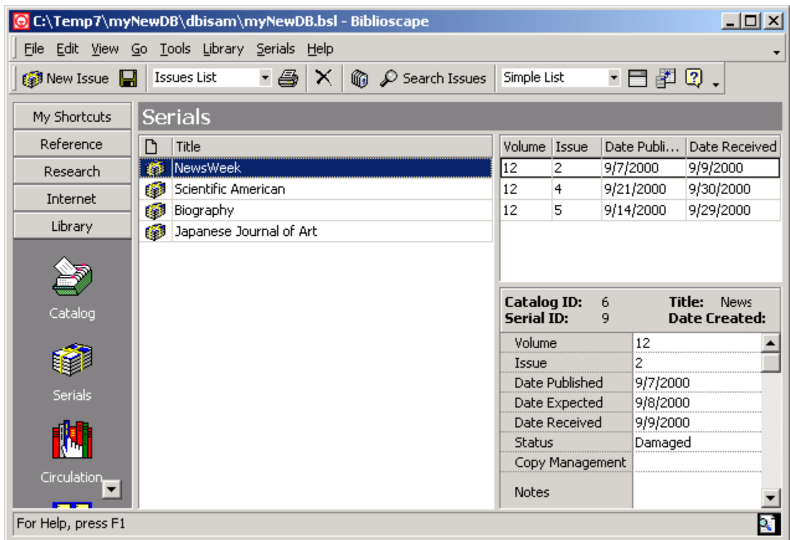


Figure 30 The Serials Page

Entering issues of a serial

Click on the **Serials** icon in the Outlook Bar or click **Library | Serials** in the menu bar, which displays the Serials page. Here you can enter the individual issues that you have available of the serial. You will see a listing of the serials you have already entered (on the Catalog page) displayed on the left of the Serials page. Click on one, then click the **New Issue** 

icon which will enable the window in the lower right of your screen. Enter the Volume (for journals) and the issue date and other appropriate information for one issue, then click the **New Issue** icon again. The information you entered for one issue now appears in the list at the top of your screen. In this way, you can enter and maintain a list of all the issues for each serial in your library.

Searching the Serials page

On the Serials page toolbar, click **Search Issues** 

opening the Search Issues dialogue box.

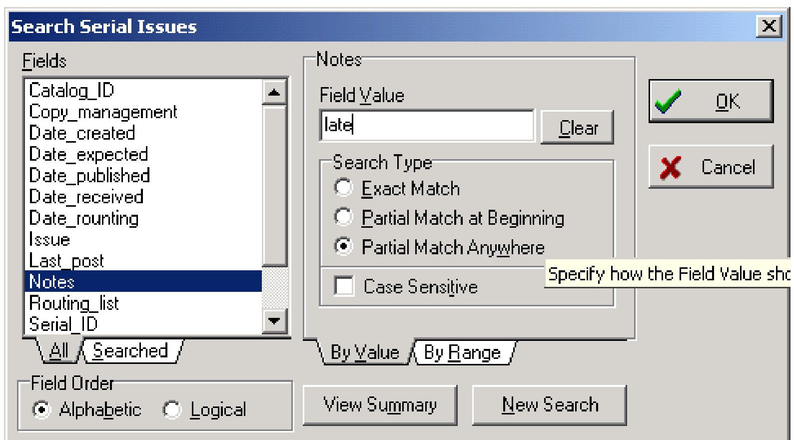


Figure 31 Search Issues dialogue box

In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Serials screen will clear, then all items matching your search terms will appear in the central pane. If the screen remains blank, there are no matches.

You may have already noticed that this search tool is primarily for administrative or organizational information.

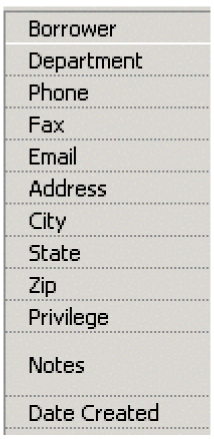
To search for *bibliographic* information in serials, use the search tool on the Catalog page.

To return to the view of all serials, click the Retrieve All Issues icon in the tool bar.

The Borrowers Page

The purpose of the Borrower's page is to record information about anyone who is going to borrow books or other items (serials, videos, maps, etc.) from your library. The information from this page will be used on the Circulation page whenever any book or library item is checked in or out.

Creating a borrower's record



From anywhere in the Library module, click on **Borrowers** in the Menu bar or the Outlook bar to open the Borrowers page. Click on **New Borrower** 

and enter the borrower’s name in the column on the right. Also enter whatever other information you will need to contact this borrower in case a book is not returned when promised. Each new borrower that you enter will be added to the list in the central panel. Information about a borrower can be changed at any time by selecting the name on the list and adding or changing information in the column on the right.

Figure 32 The Borrower’s Record

Deleting a borrower

To delete a borrower's entire record, simply highlight the name on the list and press the **Delete** key.

Searching the Borrowers page

On the Borrowers page toolbar, click **Search,** opening the Search Borrowers dialogue box.

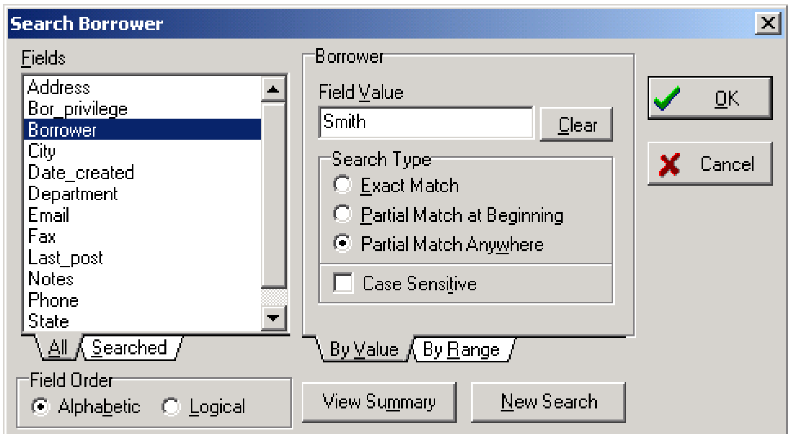
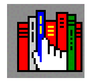


Figure 33 The Search Borrowers dialogue box

In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Borrowers screen will clear, then all items matching your search terms will appear in the central pane. If the screen remains blank, there are no matches.

To return to the view of all borrowers, click the Retrieve All icon in the tool bar.

The Circulation Page



All activities related to lending books are performed on the Circulation page. These include:

Checking items out
Checking items in
Renewing items
Holding items
Reviewing circulation history
Searching circulation history

Checking items out

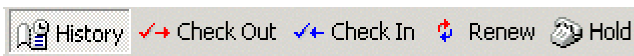


Figure 34 The Circulation Page toolbar

On the Circulation page toolbar click **Check Out**, which opens the Check Out dialogue box. Click on the **Borrower** window and select the name of the borrower. Click on the **Catalog** window and select the name of the book or other item that the borrower is checking out. The default return period is 30 days, but you can select any return date by clicking the Date Due window and selecting a date on the calendar.

Checking items in

On the Circulation page toolbar, click **Check In**, which opens the Check In dialogue box. Click in the Title window and select the name of the book or other item that is being checked in.

Important **--** you *must* click on the **Check In** button to record this transaction in the circulation records.

Renewing items

On the Circulation page toolbar, click **Renew**, which opens the Renew dialogue box. Click in the Title window and select the name of the book or other item that is being checked in. The default renewal period is 30 days, but you can select any return date by clicking the Date Due window and selecting a date on the calendar.

Important **--** you *must* click on the **Renew** button to record this transaction in the circulation records.

Holding items

On the Circulation page toolbar, click **Hold**, which opens the Hold dialogue box. Click in the Borrower window and select the name of the borrower who wants to hold the book or other item. Click on the **Title** window and select the items to be held.

Important **--** you *must* click on the **Hold** button to record this transaction in the circulation records.

Reviewing Circulation-History

On the Circulation page toolbar, click **History**, which opens the Circulation-History page. This page displays all activity that has taken place on the Circulation page. Each of the columns on this page can be sorted by clicking on the heading, or you can click **View | Current View | Group By** for other views of the circulation history.

Searching Circulation-History

You can also search the Circulation-History by clicking on **Search** in the History page toolbar, opening the Search Circulation dialogue box. In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Circulation - History screen will clear, then all items matching your search terms will appear in the central pane. If the screen remains blank, there are no matches.

To return to the view of Circulation – History, click the Retrieve All icon in the tool bar.

The Lenders Page

The Lenders page is very similar in appearance and organization to the Borrowers page and is designed to store information about libraries and other organizations that lend books or other items to your library. Information is entered in the column on the right of the page and lenders are displayed in the central panel. If you are using Biblioscape for your personal research, this is a good place to keep information about the libraries where you borrow books or where you access online catalogs.

Creating a Lender's record

From anywhere in the Library module, click on **Library | Lenders** in the menu bar or the icon in the Outlook bar to open the Lender s page.

Click on **New Lender** 

and enter the lenders' name in the column on the right. Also enter whatever other information you will need to contact this lender in an order to borrow a book or other item. Each new lender that you enter will be added to the list in the central panel. Information about a lender can be changed at any time by highlighting the name on the list and adding or changing information in the column on the right.

Figure 35 Lender's record

Deleting a Lender

To delete a Lender's entire record, simply highlight the name on the list and press the **Delete** key.

Searching the Lenders page

On the Lenders page toolbar, click **Search,** opening the Search Lenders dialogue box.

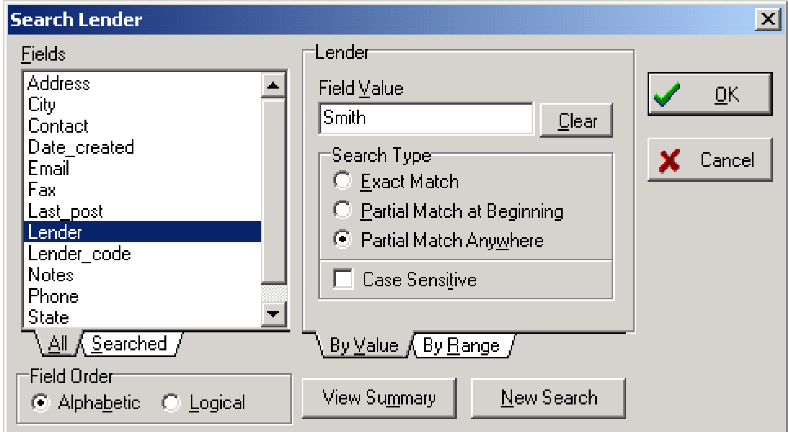
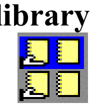


Figure 36 Search Lenders dialogue box

In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Lenders screen will clear, then all items matching your search terms will appear in the central panel. If the screen remains blank, there are no matches.

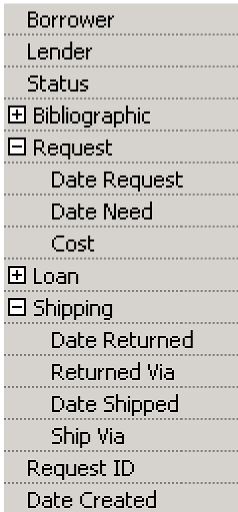
To return to the view of all lenders, click the Retrieve All icon in the tool bar.

The Interlibrary Loan Page



This is the page where you enter the details of each interlibrary transaction and where you can view the status and history of your interlibrary loans. Interlibrary loans are very useful in supplementing your libraries resources and providing greater service to your borrowers. Many libraries have Web sites where you can access their catalogs, and those that have Z39.50 compatibility can be accessed through the Internet module.

Entering an Interlibrary loan



On the Interlibrary Loan Page, click on **New Loan** 

and go to the column on the right of page. Click on the **Borrower** line and scroll down to select a borrower's name. Click on the **Lender** line and scroll down to select the name of the lending library. Fill in all the information about this transaction in the Bibliographic, Request, Loan, and Shipping sections of the column. Click on the **Save** icon in the toolbar.

Figure 37 Interlibrary Loan record

Note that your new transaction has been added to the list in the central panel.

Deleting an Interlibrary loan

To delete a loan, highlight the transaction in the list and click on the **Delete** icon.

Searching the Interlibrary Loan page

On the Interlibrary Loan page toolbar, click the **Search** icon (magnifying glass), opening the Search Interlibrary Loan dialogue box. In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Interlibrary Loan screen will clear, then all items matching your search terms will appear in the central pane. If the screen remains blank, there are no matches.

To return to the view of all interlibrary loans, click the Retrieve All icon in the tool bar.

The Suppliers Page

On the Suppliers Page, you can enter detailed information about each of your suppliers in the column on the right and view a list of all those suppliers in the central panel. This list can include publishers, distributors, office supply companies, courier services and any other suppliers of products or services you are likely to call.

Entering information about a supplier

On the Suppliers Page, click on **New Supplier** 

on the toolbar, then go to the column on the right of page and enter the name of the supplier and information about how to contact the supplier. In the Notes field you can add information about the products you purchase from this supplier and any Web address if one is available.

Deleting a supplier

To delete a supplier, highlight the suppliers name in the list and click on the **Delete** icon

Searching the Suppliers page

On the Suppliers page toolbar, click **Search,** opening the Search Suppliers dialogue box. In the Fields window on the left, you can select a search field, then select the type of search and whether or not the search should be case sensitive. Type in a search word or phrase and click **OK**. The Suppliers screen will clear, then all items matching your search terms will appear in the central pane. If the screen remains blank, there are no matches.

To return to the view of all suppliers, click the Retrieve All icon in the tool bar.

The Reports Feature

The Library Module includes a feature for creating and printing reports for each page within the module. To explore this feature, from any page within the Library Module click **File | Report** and select **Print Report** from the menu that drops down. This will open the Print Preview page and will show you the standard report for that specific page in the Library Module, as each page has a different report.

The standard reports tend to be simple and basic, so Biblioscape has included the capability to customize or create new report forms to meet you are meets. To create a custom form click **File | Report | Customize Report,** which opens a forms design page where you can create a report to meet your requirements.

Section V: Publish your Bibliographies on the Internet

BiblioWeb Server lets you use your computer as a Web server. It is surprisingly easy to use and is made available in the Biblioscape suite so that you and other researchers can share your bibliographic research with colleagues over the Internet. Beyond simply sharing information, BiblioWeb supports interaction between researchers anywhere in the world, providing password protected access to authorized users. If you registered for either the Biblioscape “Pro” or “Librarian” editions, BiblioWeb is included as part of the Biblioscape suite of programs.

By combining Web server capability with the bibliographic database, Biblioscape has achieved high levels of performance, flexibility and scalability.

Chapter 15: The BiblioWeb Server

Opening the BiblioWeb Server

BiblioWeb Server is a complete and separate program from Biblioscape, but was downloaded to your computer and installed along with Biblioscape.

If you moved the green BiblioWeb icon  onto your desktop when you installed Biblioscape, you can click on it now to open the BiblioWeb program or click **Start | Programs | Biblioscape** | **BiblioWeb Server.** You can also skip down to the next heading where you can take a look at the BiblioWeb Server.

If you do not have the icon on your desktop or a listing in your programs, it will only take a moment to place an icon. On you desktop, open **My Computer | (C:) | Program Files | Biblioscape 5,** find the green BiblioWeb icon and highlight it, and click **File | Create Shortcut**. Drag the new shortcut icon onto your desktop and click on it.

The BiblioWeb Server Page

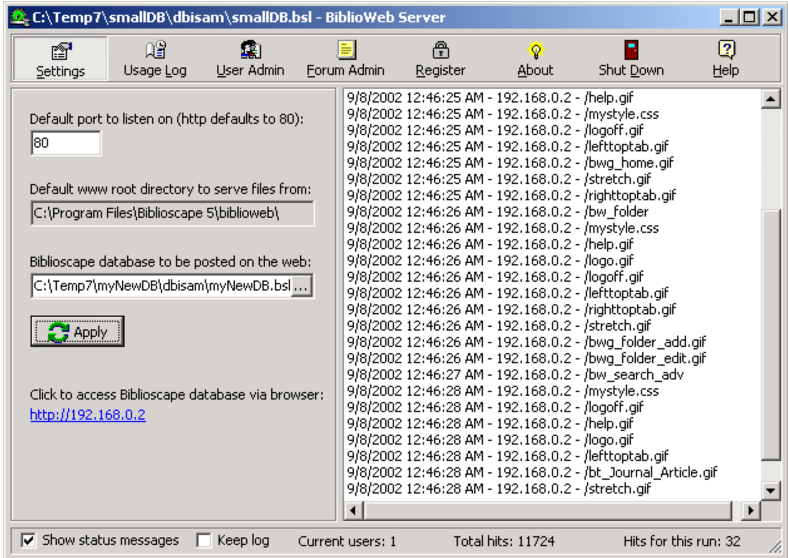


Figure 38 The BiblioWeb Server page

When you open BiblioWeb Server, it may look both plain and empty, but the large empty space on the right is a log of activities on the server, as shown in Fig. 36, so there's nothing to fill in there. For the most part, your server has configured itself when you clicked on the icon to open the program.

Setting up your BiblioWeb server

Your server port - If this will be the only server on your system, you will use the default port 80, and you can enter that in the top window if it does not already appear there. If port 80 is in use by someone else on your network, enter 8001.

Your Web address – The most important item on this screen is the Web address in blue letters, because that's your address. If you cannot use the default port (80), you must add :8001 to your address.(Notice the colon between the address and the port number). If the address shown in blue on the Web Server page is **http://209.86.27.129**, it would now be: **http://209.86.27.129:8001**. That is the address where people will find whatever bibliographies you have posted.

Note – if you click on your web address (in blue) on this page, it will open a page at the Biblioscape Web site where you can see the registration process, sign in and view a small BiblioWeb test site.

Your Web posting window- " Biblioscape database to be posted on the Web"

The default entry is the sample database that comes with Biblioscape. Click on the  button beside the window, then enter the path to the database you want to make available on the Internet. Click on **Apply** 

button. Your selected bibliographies will now be available on the Internet whenever you have the BiblioWeb server turned on.

Licensing BiblioWeb for heavy traffic

Your BiblioWeb server is licensed for 50,000 "hits" as it is installed with Biblioscape. If you expect heavy use on your site, you should consider these three different ways to license with Biblioscape.

License by the number of hits
Good for use on the Internet. Each request made of the server is considered a hit, so one visitor to your site might register a number of hits. When your server

indicates you have nearly reached the total number for which you are licensed, its time to purchase more hits from Biblioscape.

License by the number of users
Good for use on an organization's intranet. The license permits access by a specific number of registered users.

License by the number of concurrent users
Very convenient for either Internet or intranet use. The license is based on the number of users who can access the server at one time. Authorization is not necessary. The Librarian edition of Biblioscape comes with a license for three concurrent users, and the Pro edition is licensed for one concurrent user.

Switching license modes
Biblioscape licenses 50,000 hits by default, and this is the least restrictive mode as the number of concurrent users is unlimited. If you start in this mode, you can switch to the concurrent user mode whenever your hits are nearly used up. Just click **Register** on the BiblioWeb server page to select the new mode.

Managing your web site

In case you hadn't realized it yet, you are now a Web Master! And that involves a certain amount of management

The usage log
Everything that happens on your web site is logged into the Usage Log, so when you reach 50,000 hits, it is time to clear the log table. If you wish to keep a record of the log, clicking **Export** will save the log to a delimited file.

If you have no need for the Usage Log information, you can turn the log off by clicking the "Keep Log" checkmark off at the bottom of the BiblioWeb server page.

New user accounts

People who access your site are required to register before viewing your information. The registration form is very simple but will allow you to keep some control over your site.

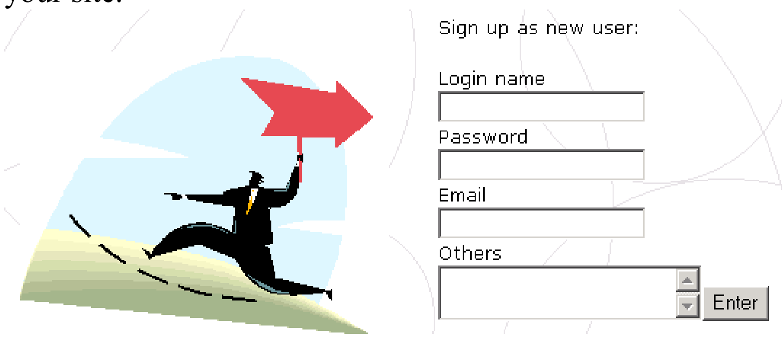


Figure 39 New User registration form

As Web Master, you will be able to extend or limit access privileges for each visitor. On the BiblioWeb server page, click on **User Admin** to open the User Admin(istration) page, where you can set parameters for visitors to your site. You have four initial choices about the privileges you are going to extend to people who register on your site:

1- "Create new account automatically upon request..."
If you check this, visitors who sign up as new users are automatically granted site privileges.

2- "Only allow the user who created the record to edit ..."

If you check this, only the person who entered a record can edit it. If you do not check this, anyone with “Write” privileges can edit any entry.

3- “Read” privileges

Marking this dot grants “Read” only privileges to visitors who are automatically registered.

4-“Write” privileges

Marking this dot grants “Read” and “Write” privileges to visitors who are automatically registered. Be careful.

As visitors register, you will be able to review the list of users and change or increase their privileges as you feel appropriate.

Logging in

Once a visitor to your site is registered, logging in will require only a Login name and a Password.

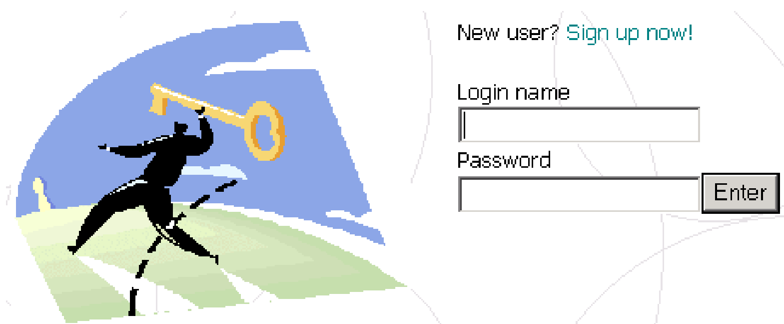


Figure 40 User Login

It may have occurred to you that there is information in your database that you don’t really want to make available to everybody that finds your site. Here’s a solution.

You will probably remember seeing a term “Web Post Hide” in Biblioscape and wondering what it meant. Now you can use it. In Biblioscape, click **Tools | Options** and select the **Others** tab. The column on the right is labeled “Web Post Hide Fields” and includes a check box for each of the fields found in references. If you protect your notes from the view of visitors, simply check the box next to Notes. Do the same for any other fields you want to keep private.

To exclude individual references from the web site, go to References, select a reference and double click on it to open the References Page. Select the All Fields view, scroll to the bottom of the page and check the box for the Web Post Hide field.

If you’ve never worked with servers and web sites before, this experience with BiblioWeb has probably surprised you with the ease of setup and administration. But, as you look back at what you have covered in this book and with Biblioscape, it’s all pretty simple when you work on one part at a time. When you combine the parts, you gain substantial leverage.

This combination of BiblioWeb, Biblioscape, BiblioWord and the other modules you’ve worked with in the Biblioscape suite demonstrates that this is truly a comprehensive set of tools for anyone conducting research at any level.

Section VI: Help is always available on your computer at www.biblioscape.com support@biblioscape.com

Wherever you are in Biblioscape, help is available. The “question mark” icon at the right end of the tool bar will take you directly to the Content and Index section of the Help Page with one click. You can click **Help | Biblioscape on the Web | Support** and reach Biblioscape’s online Technical Support almost instantly. In addition, you can email questions to support@biblioscape.com, and expect a prompt reply.

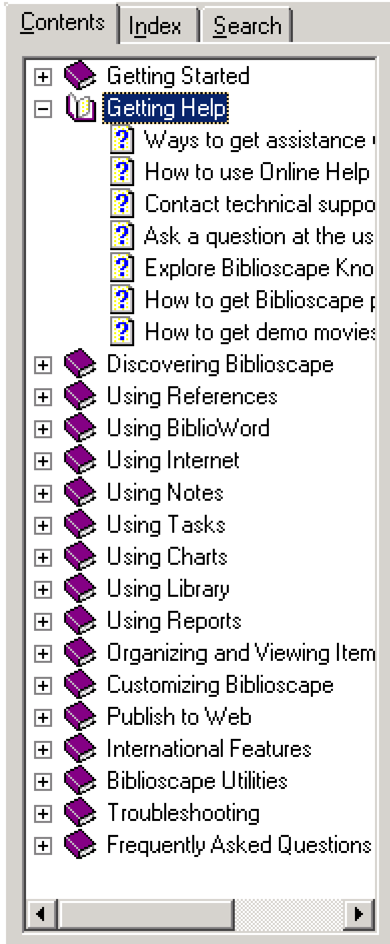
If you are new to Biblioscape, click **Help | Learn Biblioscape** to see a tutorial movie, or take a look at “Getting Started” in the Content and Index section of Help.

Chapter 16: The Biblioscape Help Page

From anywhere in Biblioscape, click **Help** in the menu bar. From the dropdown menu, select any of the items below (boldface headings).

Content and Index – Help located on your computer

The Content and Index section of Help displays a general description of each Biblioscape module in the central panel, which provides a good overview of the program. The panel on the left displays a column with three tabs.



Contents Tab- Displays a list of general topics. Pick a topic and click on the"+" sign to open a list of sub-topics. Clicking on a sub topic will display the information for that sub-topic in the central panel.

Index Tab- Displays an alphabetical list of most items in Biblioscape. There is a window at the top of the column where you can type in a keyword that describes what you are looking for in Help. When you press **Enter** or **Display**, Biblioscape takes you to that word in the index and opens a box that lists related topics that should provide the help you need.

Figure 41 Help Content and Index

Search Tab- This is a unique approach to finding help, as it searches Biblioscape for every instance where the keyword you enter appears in the Biblioscape Help manual. A list of topics that contain the keyword appears in the column, then clicking on a topic displays that paragraph (or page) from the Help manual with the search word highlighted wherever it appears in the text.

Learn Biblioscape (Requires an Internet connection)

To help you learn quickly, Biblioscape offers a tutorial movie that will show you the basics of using bibliographic software.

Biblioscape on the Web (Requires an Internet connection)

Home - Takes you to the Biblioscape Home Page, which includes general information about Biblioscape, product information, downloads and access to the current newsletter

Support - Takes you directly to the product support page.

E-mail Support (support@biblioscape.com) Emails are reviewed hourly between 9:00AM and 9:00PM Eastern Standard Time, and responses usually go out with a few hours of receipt.

User Forum for General Discussion “This is a web based discussion, bug report, and feature request system. It provides a structured and formal environment where customer problems are visible to all customers (even potential ones) and promotes the core ideals of customer service present at CG Information. 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. The system is also consistent with CG Information's e-mail only support policy and hopefully provides a comfortable support environment for all customers.” This statement is quoted because it reflects Biblioscape’s policies and attitude. The User Forum is monitored by CG

Information staff so that they can respond quickly to any questions that arise.

The Knowledge Base The knowledge base includes a list of topics with answers, and also includes a search tool where you can enter key words.

FAQ (Frequently Asked Questions) This page includes a large number of questions selected by the Biblioscape support staff from questions that Biblioscape users have asked. Many of your own questions can be answered here.

Bibliorama This area includes the back issues of Bibliorama, Biblioscape's online magazine. Issues will include information on upgrades, new downloads and other helpful information.

Download Import Filters This page includes a list of Import filters which are available as downloads as well as a section on how to use import filters.

*Download Style*s This page includes a list of documentation styles which are available as downloads as well as a section on how to use or create different styles.

Download Update Patches- Whenever "bugs" are found in the software, Biblioscape creates a "Bug Fix". From time to time, all the bug fixes are gathered together to make up a "Patch" which can be downloaded and added to your Biblioscape software. This page offers the current patches and lists all the bug fixes that are included in the patch.

Purchase - If you’re still using the demo version of Biblioscape, click here to purchase your personal registration number that opens Biblioscape beyond the trial period.

About Biblioscape - This page shows the edition of Biblioscape that you have licensed, the User Name that Biblioscape has assigned you and your machine ID number. This page also has shortcuts to access System Information relating to your computer and to contact Biblioscape Tech Support.

Biblioscape provides several alternatives from which you can choose the type of assistance you need for any given situation. In addition, they have a very open attitude toward sharing information with and between users of the software, which gives you the benefit of sharing information with other users.

Glossary of Terms

Following are definitions of some of the terms used in Biblioscape. The information in parentheses refers to the amount of space available if the word describes a line or page in Biblioscape. For example, **(memo: 256MB)** tells you that you can store up to 256 megabytes of text, graphics or other information in this area. **(char: 250)** tells you that on the address line you can type up to 250 letters or numerals in this field. More detailed information for most of these words can be found using the index.

Abstract (memo: 256MB) A summary of the full content of a book or article.

Accession Number (char: 20) For storing an ID number of a database during records importing. For example, the “PMID” can be put into this field when searching Medline at PubMed. This field can also be used to store any locally-meaningful number, a universal code number, or whatever will identify a record.

Address (char: 250) Principle author's mailing address, or the author's affiliation.

Attachment (char: 250) 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 in a similar way as an email attachment.

Authors (char:250) All authors should be listed in the format “Lastname, firstname middlename" (Smith, Kenneth D.) and separated by “; “.

Availability (char: 50) The ways to access the reference if it is not easily available. Can also be used to indicate whether the reference is published or in preparation (for example: In Press or Work in Progress) and when it will be made publicly available

Bibliography A listing, usually at the end of a document, book or chapter, including details about authors, titles and publishers of the works cited.

BiblioSidekick A utility that can be used with nearly any word processor. BiblioSidekick displays a list of references alongside a document, allowing the references to be “dragged and dropped” into the document.

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

Capture Reference In the Internet module, this command copies all available bibliographic information from a source (database, library, etc.) and places it in a designated folder in your database.

Capture Web Page In the Internet module, this command copies a web page and places it in a memo field.

Categories (char: 100) A category is a keyword or phrase that helps you 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" project when you create a category named "Chem 102" and assign references to it.

In the reference editor Window, if you are in the Categories field in the "User Defined" panel, clicking on the Search button at the end of the field will bring up a lookup window where all categories used are listed. You can then pick one of them. If there is more than one category in this field, separate the categories with "; ".

Citation A notation in a document that acknowledges and documents works of authors.

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

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

Custom 1 (char: 250) Any data that is not suited for another field can be put here. You can use this field to store a type of data that is not included as default by Biblioscape.

Custom 2 (char: 250) Same as "Custom 1".

Custom 3 (char: 100) Same as "Custom 1".

Custom 4 (char: 100) Same as "Custom 1".

Custom 5 (char: 50) Same as "Custom 1".

Custom 6 (Custom_6: char: 50) Same as "Custom 1".

Database - A large file where you store your references. You can put all your information into one database (Biblioscape can handle 10,000 references in one database easily) or you can have separate databases for large categories. If for one project you are collecting information about robotics, but elsewhere are doing research on palm trees it would be logical to have separate databases. Biblioscape can accommodate as many databases as you wish to have.

Date (date) The date the reference was published. Must include all three values: year, month, date and must be entered in US format 12/ 07/91.

Date Freeform (char: 20) This space can take a date in any format, with or without all 3 values.

Date Created (date) The date when a reference was first added to a database. This field is automatically created by Biblioscape when a new reference is added and is useful in building Advanced Searches or Dynamic Folders.

Date Modified (date) The date when a reference was last edited. This field is automatically updated by Biblioscape when a reference is edited. This value is useful with "Advanced Search" or "Dynamic Folder".

Description (char: 150) A brief description of the physical property 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 (memo: 256MB) For storing the full text of a reference. The document can include formatted text, graphics, OLE objects, etc.

Dynamic folder A dynamic folder can follow “rules” or query parameters that you establish. With those rules, the Dynamic folder searches your database to find all references that meet the requirements you have set.

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

Editor (char: 250) The editors of a publication. Do not put “ed.” etc. in this field, because Biblioscape will add those according to the output style used. Enter names in the “Authors” format.

End Page (char: 20) The end page number of a reference when a page range is needed. For example, Journal Articles and Book Sections.

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

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. You can edit it later if needed. The File As field can be used as a temporary citation to uniquely identify a reference.

Folder A subdivision of a database. You can have many folders in one database and you can have one reference in many folders. References can be moved into folders, and they are always available in that folder. There is also a Dynamic folder available (Blue Folder) that will search your database and add any references that make the criteria you set for the folder. Once you have established a Blue Folder, any new references added to your database that meet the criteria will be added to that folder.

Format In the context of Biblioscape, Format refers to the act of converting temporary citation “tags” in your document to actual citations in the documentation style (MLA, APA, Chicago, etc.) of your choice. The ability to move between temporary tags and formatted citations allows you to print your document and references in one style, then print the same document in a different style.

Index Biblioscape indexes everything that you enter, including full text articles. This is important to you when you need to find an important piece of information which you have entered, as one of the many search, sort or lookup tools in Biblioscape will be able to find it.

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

Journal / Secondary Title (char: 250) 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 type “Journal Article”, the authors use “Journal / Secondary Title” for its generic name.

Keywords (memo: 240) Words that will help you identify or categorize a reference and will help you find that reference when you need it. Biblioscape has a very capable system for searching by keywords. Individual keywords should be separated by “; “.

Link Allows you to connect an area in Biblioscape to: another area in Biblioscape; a file in your computer; a program in your computer; a Web site; an email address.

Label (char: 60) Text that can help you to 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 purpose: Reference ID; File As; Call Number.

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 (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.

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

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

Natural Citation A citation without an identifying reference number. To set Biblioscape for Natural Citation, click **Tools | Options**. Select the **Format Manuscript** tab and check the box (last on the page) that says" "Use 'File As' instead of 'Reference ID' for Temporary Citation".Useful if you are writing a document on multiple computers.

Notes (On the Reference Page) For storing your comments, ideas, etc. about a reference. This is a memo field and can take up to 256 MB of data.

Notes Module A complete module for creating and storing notes that do not relate to specific references. This module will also store graphics, web pages and nearly anything you want to save.

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

Other Title (char: 250) For storing any data that is a title in nature. Depending on the reference type, it could be the original title if the reference is first published in a foreign language.

Output style- Hundreds of documentation styles are available in Biblioscape, some very general and widely used (MLA, Chicago, APA are examples) and others specific to a single publication (American Journal of Pathology, for example, and many more).

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

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

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

Reference- The information you have from one source. Examples could be a journal or magazine article, book, interview, television program or a variety of other sources.

Reference ID (integer) A number that can uniquely identify a reference in bibliographic database. This number is handled by Biblioscape internally, and you can not be changed

Reference Mark (char: 1) For storing a single character “X” to flag a reference. A reference can be marked for all kinds of purposes.

Reference Read (char: 1) Stores 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 (char: 30) Biblioscape has 27 pre-defined Reference Types, each with a set of associated data fields. The Reference Type determines how the reference will be formatted in a bibliography.

Reprint (char: 12) The reprint status of a reference. You can choose from In File, Not in File, On Request, or type in whatever can fit into the field.

Section (char: 20) Used when the reference is only a part of a publication. Needed for certain reference types like Edited Books, Newspaper Articles, Statute, Bill, etc.

Series Editor (char: 250) 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, Kenneth D.) and separated by “; “.

Series Title (char: 250) Series title of the reference. You should enter the series title in the same way you would like it to be capitalized in your bibliographies..

Short Title (char: 100) The abbreviated version of the regular title. In many humanities styles, a short title is used in a citation to identify which reference is being cited.

Start Page (char: 20) The start page number of the reference. If you only have one page number for a reference, put it into this field.

Style (Output style)- Hundreds of documentation styles are available in Biblioscape, some very general and widely used (MLA, Chicago, APA are examples) and others specific to a single publication (American Journal of Pathology, for example, and many more).

Subject (char: 250) The Subject field can be used to classify references so you can easily find, sort, filter, or group them. Use Subject 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 about “Computational Chemistry” when you create a subject named “Computational Chemistry” and assign references to it.

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 are listed. You can then pick one of them. If there is more than one subject in this field, separate them with “; “.

The Subject field also gives you a way to keep track of references without putting them in separate folders. For example, you can keep references belonging to different subjects in the same folder, then use “By Subject” view to group them.

Title (char: 250) Title of the reference. You should enter the title in the same way you would like it to be capitalized in your bibliographies.

Translator (char: 250) This field is designed to store a person's name. It could be a translator, performers, etc. depending on the reference type.

Type of 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 (char: 250) If a reference has a related page somewhere on the Internet, you can enter that URL location in this field. By clicking the Web Link button, Biblioscape will take you to that location. Be sure to enter a complete URL.

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

Web Post Hide (char: 1) Indicates whether to show or hide certain fields when the bibliographic database is posted to the Web by the BiblioWeb server. Which fields to hide can be selected by going to the menu command **Tools | Options,** then select the **Others** tab.

Work Reviewed (char: 100) For entering works reviewed by the reference. Reference types such as Journal Articles, Magazine Articles, Newspaper Articles, and Book Chapters can be a review of books, computer programs, films etc. You can enter the name and author of a work being reviewed into this field.

Year (integer) The year a reference is published.

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