

BIBLIOGRAPHY MANAGER II v. 2.0 MANUAL

About Bibliography Manager II

This stack is a tool for managing literature references, and requires HyperCard v. 2.1 or greater to run. It was originally distributed as "Bibliography Manager", and then upgraded to "Bibliography Manager II", as a set of stacks written for HyperCard v. 1.5. With the advent of HyperCard v. 2.1, I redesigned the stack to take advantage of HyperCard's new capabilities, but did not intend to distribute it as shareware. However, there was enough interest from those who had begun using the earlier versions in some of the capabilities that had been added in the new version that I decided to distribute it. Since I designed this stack for myself and my colleagues in science, and am not familiar with all the protocols for literature cataloging and referencing in other areas of study, it may not suit everyone's purpose, but I hope that it can be a useful tool for those who want to keep track of literature references and who need to create reference lists when they write papers.

About this Manual

Since most Macintosh users like to explore software before exploring manuals, this manual is divided into four sections: Basics, Example, and Reference, and Quick Reference. Those who wish their exploration of Bibliography Manager II to proceed with the minimum of interference from tiresome documentation or mundane examples can confine their perusing to the Basics section (and it should be read before proceeding!) and Shareware Notice, saving the Reference and Quick Reference sections for when they are hopelessly adrift. Others are encouraged to try a more hands-on approach by following the instructions for creating a sample Bibliography in the Example section.

BASICS

I. Getting Started

The first time that you use Bibliography Manager II, you will want to create a Bibliography Stack (don't use the stack "Bib. Man. II Template Stack" for storing information). To create a Bibliography Stack, open the stack "Bib. Man. II Template Stack" and choose "Create a new stack". You will be given the chance to enter a prefix for the Filing Codes that will be assigned to this stack. The Filing Code feature assigns numbers to the references in your reprint collection (the codes can be designed to store more information than just a simple number). Since you can create as many Bibliography Stacks as you wish, you may want to distinguish them (e.g., by subject). The code you enter now can optionally be assigned to all references you put into the Bibliography Stack you are about to create. As with any Filing Code you enter, any letters that you capitalize will be used to create the abbreviation for that Filing Code, and spaces will be replaced by "_". Once you have entered a code, you will then save a copy of the template stack with whatever name you chose. Then you need to open up this stack to begin using it.

Once you have created your own Bibliography Stack, you can begin to store entries. Use the "New entry" button if you want to simply type information into the file. If you want to import information from a text file, you can use the "Import text" command in the "Utilities" menu. I would strongly recommend that you

read the explanation of this command in the Reference section of this manual before attempting to read in information from text files.

III. Proper Format for Information

In order that Bibliography Manager II can properly sort the entries in your Bibliography Stacks alphabetically, you should use the standard format when entering information into them. The most critical field is the Author field. Each author name should be on a separate line, last name first followed by a comma, then first name(s) or initial(s) separated by spaces. If there are any titles (e.g., Jr., III, etc.), place them, preceded by a comma, after the first (or middle if present) name or initial. For example, "James G. Baker III" should be entered as "Baker, James G., III." Periods after initials are optional. The remaining fields should contain the appropriate information with no preceding or trailing punctuation marks except if used to identify an abbreviation. **HINT:** If you are entering information for a book or a chapter of a book, enter all of this information in the "Source" field and leave the "Volume" and "Pages" fields blank. User-created export formats will automatically check whether both of these latter two fields are blank, and if they are will not export these empty fields or any punctuation characters your export format would normally put between them.

If you use the proper format for your entries, Bibliography Manager II will be able to sort and export your entries in proper alphabetical order and allow you great flexibility in creating export formats for your entries (for example, there are 1,656 possible combinations of order/punctuation of Author names).

EXAMPLE

Follow the steps below to create a sample Bibliography from the "Sample Exchange File" document included with Bibliography Manager II:

1. Copy the files "Bib. Man. II Template Stack" and "Sample Exchange File" to your hard disk or working disk (in any folder you want).
2. Open the stack "Bib. Man. II Template Stack" from the Finder, or open HyperCard, choose "Open Stack" from the File menu, and locate and open "Bib. Man. II Template Stack".

3. You should be shown the Shareware notice; click the button "Just trying it out" for now.
4. Click the button "Create a new stack".
5. You will be asked to enter an abbreviation to be used as the default prefix for Filing Codes in this stack. Either choose "No default prefix" or make up a code (see discussion of Filing Codes below for details).
6. Once you have entered a code you will be presented with the standard HyperCard "Save a Copy" dialog box; enter a name for the stack (e.g., "Sample Bibliography"; **DO NOT use "Bib. Man. II Template Stack"**) and click the "Save" button.
7. Once this new Bibliography Stack is created you will be asked to open the new stack. Do this now.

8. The next step is to read in information from the file "Sample Exchange File". To do this, choose "Import text" from the "Utilities" menu.
9. You should now be shown the card where Import Formats are saved. Click the "Bib. Man. II Exchange File Format" button.
10. Use the "Open" dialog box to locate and select the file "Sample Exchange File" and click "Open".
11. Once the file is read in you will be asked if you wish to update the Journal List. If you choose to do this now, the program will go to each entry and, if the text in the "Source" field is not too long and is not currently on the Journal List, will prompt you either to enter an abbreviation for (what is assumed to be) the journal name in the "Source" field, or to leave that text/journal off of the list.

Now you can experiment with the many features of Bibliography Manager II. Look at the operations that are available under the "Utilities" menu or at the bottom of the card. Some possibilities for experimentation are:

- Click on the title of any field to perform a "Quick Search" (see "Reference" for details on this feature).
- Try updating the Journal List (if you haven't already) and entering Filing Codes.
- Since the file includes duplicate entries and is not in alphabetical order you can try out various file maintenance features under the "Utilities" menu.
- Try typing in your own entry or deleting an entry or two.
- Try marking a subset of cards for browsing.
- Practice exporting information to a text file (you might want to do a bit of reading in the "Reference" section before attempting this).

REFERENCE

A. CREATING NEW STACKS

To create a new Bibliography stack, open the stack "Bib. Man. II Template Stack" and follow the instructions.

B. COMMAND BUTTONS AND MENUS ON ENTRY CARDS

1. **Home:** takes you to the Home card.
2. **Quit:** quits HyperCard.

3. **New Entry:** allows you to add a new entry to the Bibliography Stack by creating a blank card for you to type into. The new entry is automatically given a Reference Number.
4. **Delete Entry:** deletes the current entry; if you click on this button while holding the **Option key** down you can delete a range of entries by entering the first and last reference numbers of the range desired when prompted. This option comes in handy when you need to delete the bunch of references you just read in the wrong way!
5. **Mark Cards:** takes you to the "Marking Setup" card, where you can specify criteria for marking a subset of entries. See Section D below for a discussion of how to specify subsetting criteria.
6. **Unmark All Cards:** removes any subsetting by unmarking all cards in the stack.
7. **Left Arrow:** moves to the previous entry in the Bibliography Stack; click on this button while holding the **Option key** down to move to the first entry in the stack. If "Browsing Marked Entries" is checked, clicking this button moves to the previous marked entry in the stack.
8. **Right Arrow:** moves to the next entry in the Bibliography Stack; click on this button while holding the **Option key** down to move to the last entry in the stack. If "Browsing Marked Entries" is checked, clicking this button moves to the next marked entry in the stack.
9. **"U-turn" Arrow:** this special arrow takes you back to the last entry you were looking at after a search has located another entry.
10. **Journal List:** clicking this button will bring up a dialog box showing all the journal names currently in the Bibliography Stack's Journal List. The journal name you choose will be entered in the current card's "Source" field.
11. **Filing Code menu:** holding the mouse down in the "Filing Code" field will bring up the Filing Code menu. This menu allows you to delete the Filing Code for the current entry, or to enter a Filing Code for the current entry, either by creating a new code or by choosing one from those currently in the Bibliography Stack's Filing Code List.

The Filing Code menu allows you to delete the Filing Code for an entry, create and use a new Filing Code for an entry, or assign an existing Filing Code to an entry. Any time you create a new Filing Code, that code is saved to the Filing Code List and appears in the Filing Code menu. Filing Codes are purely optional. They are made up of one to several short abbreviations, followed by a number, that allow you to categorize your reprints by subject and number them. When you type in a Filing Code, you specify the way in which it will be abbreviated by capitalizing the letters you want used in the abbreviation. If you enter spaces, they will appear as "_" in the abbreviation. For example, suppose you had entered "PLant BIOlogy" as your Filing Code prefix for a stack. Then, when prompted for a new Filing Code, you entered "ANATomy" after the default prefix "PL_BIO-", and asked to have the numbering start at 1. This would result in the current entry being assigned the Filing Code "PL_BIO-ANAT-1". The code "PL_BIO-ANAT" would now appear in the Filing Code menu, and each entry you assign to this code will automatically be numbered consecutively.

You can assign a new Filing Code to an entry without adding it to the Filing Code List by selected "New" from the Filing Code menu while holding the **Option key** down. You can also assign an existing Filing Code to an entry with your own number (i.e. without using the automatic numbering system) by selecting that Filing Code from the Filing Code menu while holding down the **Option key**. These features might come in handy if you already have a coding system started.

12. **"Quick Search" buttons:** you can search a field at any time by clicking on the name of the field.

There are two ways to choose the text to search for. If you select text in any field with the mouse, and then click on any field's name, Bibliography Manager II will automatically search for the selected text in the field you clicked (HINT: you can select a word in any field by double-clicking on it). If nothing is selected when you choose a Quick Search you will be asked to type in a key to search for; in the Author, Date, or Keywords fields, the first name or word in that field will be presented as a default search key. Your most recent quick search key becomes the default key for subsequent quick searches in the same field. You can repeat quick searches in the same field by holding the **Option key** down while clicking the Quick Search button again.

13. **Determining the highest Reference Number assigned:** if you click the "Reference Number" field title while holding down the **Option key** you will get a dialog box showing you the last Reference Number assigned.
14. **Clean up non-scrolling fields:** Sometimes when you read in entries from a text file the information doesn't end up in the right fields because of problems in the text file. This can create editing problems in the three fields that do not scroll - "Date", "Volume", and "Pages" - when the text in these fields goes beyond the first line. A safety-valve for this problem has been built in. If you click on the names of any of these three fields while holding down the **Command key**, the entire contents of the field will be removed and appended to the "Notes" field.

C. THE UTILITIES MENU

1. FILE MAINTENANCE COMMANDS

- a. **Sort:** sorts the entries Bibliography Stack in order by author and date. This operation also checks for blank entries (actually, for entries in which the Title is blank) and asks you if you want to delete them. After the file is sorted you have the option to renumber the file immediately.
- b. **Renumber:** assigns consecutive numbers, starting with 1, to entries in the Bibliography Stack after sorting them.
- c. **Search for duplicates:** This can be a time-consuming operation (depending on the size of your stack), though only the computer is tied up for the bulk of it. What this does is find entries that have both the same (1) first word in the Author field and (2) last word in the Title field. It then displays, in one place, each set of suspected duplicate entries and gives you the option of deleting and/or keeping each of these. If there are more than five entries that are the same, you will have to do this more than once to isolate and delete the extras.
- d. **Update Journal List:** Use this command to add journal names to the stack's journal list by checking the "Source" fields of each entry for journal names that do not appear on the list. When you select this command, all entries from the current entry to the end of the stack are automatically checked, and then you are given the option of checking from the beginning of the stack. When the computer finds an entry in a "Source" field that is not currently in the stack's Journal List, you will be prompted either to enter its abbreviation and add it to the list or to ignore that "Source" entry. The program automatically ignores "Source" field entries that are more than 50 characters long.

2. IMPORT/EXPORT COMMANDS

- a. **Import text:** this menu selection takes you to a card displaying all the currently specified Import formats. You can either choose an existing format and begin the process of importing text, or you can specify a new format (which you can then save if you wish).

Import formats:

Bibliography Manager II can read in text files as long as they are formatted so that the right information can be put into the right fields. If the file you want to read in is a "Bibliography Manager II Exchange File" - that is, if the file was created by Bibliography Manager II using the export format "Bib. Man. II File Exchange Format" - click the button bearing that name. Otherwise either choose an input format you defined and saved previously or specify a new format for your input file.

To describe the required format for the information in your text file, I use the standard database terms "field" and "record". In this case, a "field" corresponds to a field on the cards in a Bibliography Stack (i.e. Author, Date, etc.) and a "record" corresponds to an individual card or entry. Any text file you want to read in must have the following attributes:

- The information for one record must be contiguous;
- Within the information for one record, the information to be put into one field must be contiguous (e.g., no first having some author names, then the date, then more authors);
- The information for each field must be terminated by a delimiter that is either a SINGLE non-space character, a tab, or a carriage return, and that delimiter should be the same for the entire file;
- The information for each record may also optionally be terminated by a delimiter or carriage return; the record delimiter cannot be the same as the field delimiter.

To specify the format of your file, select a previously saved Import format or click the "Specify a new Format" button.

When specifying a new Import format, you will be prompted for four categories of information about your text file. First, you will be asked to specify in what order the information for each field appears in; simply click on the field names in the order that the corresponding information appears in your text file. Secondly, if your input file includes author names, you will be asked to specify (1) the order in which the first author name appears, (2) the order in which the second author name(s) appear(s), and (3) whether there are commas between the author names. Next you will be prompted to specify the field delimiter - choose either "One Line per field" (if the information for each field is terminated by a carriage return), "Fields separated by Tabs", or "Set Field delimiter". Lastly you will be asked to specify whether or not you have record delimiters in your text file, and if so, what they are.

Here are a few things to keep in mind when you are setting up a text file to be read in:

- If you use special characters for your field and/or record delimiters, make sure that they do not appear in the text of the information itself.
- Be sure that you have a delimiter after the last field for each record if you are not using record delimiters. (This is not a bad idea even if you are using record delimiters, as it will make the operation go more quickly).
- Be sure that you have field delimiters for each field in each record **even if there is no information for that field.**
- Blank lines between records will be ignored (EXCEPT in "Line per record" format); HOWEVER, if you are using "Line per field" format be sure that there is one line for each field **even if there is no information for that field.**

The entries read in are added at the end of the Bibliography Stack and automatically assigned Reference Numbers. Once your file has been read in (or you have stopped the read operation), you will be returned to the card of the first entry that was read in. HINT: If you want to delete the entries you just read in for some reason, you can easily do it by (1) noting the Reference Number of the first entry read in, (2) clicking on the "Reference Number" field

title while pressing the Option key - this gives you the last Reference Number read in, and (3) clicking "Delete entry" while pressing the Option key to delete a range of entries and entering the first and last Reference Numbers read in.

- b. **Export Marked...:** This menu selection allows you to export the subset of entries that are currently marked to a text file. You will be presented with the card showing all the currently available Export Formats; you can either choose an existing format or design a new one. The following discussion of Export Formats applies to both export commands.

Export Formats:

Bibliography Manager II comes with one predefined export format. It is designed solely for exporting information to another Bibliography Manager II Bibliography Stack. All other export formats are designed by the user. These export formats, once designed, can be saved for future use with any Bibliography Stack.

When you design a new export format you will be guided through this exercise by the program. Basically, you design the export format by clicking on the buttons that represent the information fields in your Bibliography Stack and possible punctuation or other characters in the order you wish them to appear in the export. The format design will appear in the box immediately above them. Use the "**Undo**" button to undo mistakes or the "**Clear Format**" button to start over. A single space (◇) is automatically inserted before each item of bibliography information, open parentheses, or characters or words typed in by the user, unless "Omit preceding space" is checked (which is the default after colons, tabs, or carriage returns have been entered). Also, when text is exported to a file, each record (all the information from one entry) is followed by two carriage returns. If you elect to include Author names in your export format, then you will be asked to specify formats for the order of, and punctuation of and between, the first author and co-author(s) names, and whether to use initials or full names (if present in the stack) for first and middle names. When you have finished designing the format, click "**Create Format**". You will then be shown an example of the format you have designed.

Once you have created an export format, you can choose either (1) "**Design a new format**" to start over, (2) "**Use format**" to use the format without saving it, or (3) "**Save format**" to name and save the format for future use before using it.

The special predefined export format "Bib. Man. II File Exchange Format" allows you to move information from one Bibliography Manager II stack to another. You can choose to export one or more of the following kinds of information: References, Journal List, Filing Code List, Import Formats, and Export Formats. You can then read this information into another Bibliography Stack, even if it already has information for these items.

- c. **Export All:** writes all entries in the Bibliography Stack, in their current order, to a text file using whatever export format you choose (see discussion of export formats under the information for "**Export Marked...**" above).

3. NAVIGATIONAL COMMANDS

The last set of items in the "Utilities" menu lists the names of all the cards in the stack on which you can do manipulations. Selecting an item from the list will take you to the corresponding card:

Selecting **References** will take you to the first Reference entry.

Selecting **Marking Setup** takes you to the card which is used to specify criteria for marking cards.

Selecting **Journal List** takes you to the card displaying the stack's list of journal names and their abbreviations. You can edit items in the list, or add new journals to the list, by clicking the "Edit List" button. You can delete a journal from the list by clicking the "Delete a Journal Name" button. You can also delete ALL journal names from the list by clicking the "Delete a Journal Name" button while holding down the **Option key**.

Selecting **Filing Code List** takes you to the card displaying the stack's list of Filing Codes and last numbers assigned to each. You can delete a Filing Code from the list by clicking the "Delete a Filing Code" button. You can also delete ALL Filing Codes from the list by clicking the "Delete a Filing Code" button while holding down the **Option key**.

Selecting **Specify Import Format** takes you to the beginning of set of cards used to specify the format of files to be read into the stack.

Selecting **Import Formats** takes you to the card displaying the saved Import Formats for the stack; you can begin the process of importing a file by clicking on one of these, or choose to specify a new format or delete a format. Up to 21 Import Formats can be stored. You can delete all stored Import Formats by clicking the "**Delete a format**" button while holding down the **Option key**.

Selecting **Create Export Format** takes you to the beginning of set of cards used to create export formats.

Selecting **Export Formats** takes you to a card displaying all the currently saved Export formats. You can either choose an existing format and begin the process of exporting entries to a text file, or you can design a new format or delete a previously stored format. Up to 21 Export Formats can be stored. You can delete all stored Export Formats by clicking the "**Delete a format**" button while holding down the **Option key**.

Selecting **Help** will take you to the on-line help card.

D. SUBSETTING ENTRIES - THE "MARKING SETUP" CARD

The "Marking Setup" card allows you to specify criteria for marking a subset of the entries in your Bibliography Stack. You can either type in marking criteria yourself using the appropriate HyperCard syntax, or you can automatically create criteria specifications using the buttons on the top of the card. Just click on a field name to indicate what text to search for in a field, and on the "**AND**", "**OR**" or parentheses buttons to add these elements to your specification's syntax. For example, say you wanted to mark all entries where: the word "resource" appears in the title OR the Date field equals 1988 AND the journal name (the Source field) is "Science". The proper way to specify this would be as follows:

(field "Title" contains "resource") OR ((field "Date" = 1988) AND (field "Source" = "Science"))

If you make a mistake, you can edit it directly or just use the "**Clear Criteria**" button to start over. **NOTE** that the buttons only place text at the END of the text in the criteria specification field. You should be able to get the hang of creating specifications with a little experimentation.

Once you have specified your marking criteria, click the "**Mark Cards**" button to mark all entries that meet your specifications. If a subset of entries has already been marked, you can unmark them first or add the entries meeting your current specifications to those already marked.

After you have marked some entries, you can create a list of all the marked entries in the field at the bottom of the card using the **"List Marked Entries"** button. Once you have created this list, you can use the buttons that appear to export the list to a text file, print the list, or clear the list. You can also go directly to the card for any entry on the list by clicking on that entry.

QUICK REFERENCE

This section briefly describes how to perform actions available in Bibliography Manager II v. 2.0.

A. FILE COMMANDS

1. **Create a new Bibliography Stack:** open the Bib. Man. II Template Stack and follow the instructions

B. ENTERING REFERENCES

1. **Type in a new entry:** click the "New Entry" button
2. **Import entries from a text file:** select "Import Text" from the "Utilities" menu, and then choose an existing import format or specify a new format
3. **Automatically enter a journal name from the journal list:** click on the "Journal List" button and select an item from the list presented.
4. **Enter a Filing Code:**
 - a. **Add a new Filing Code to the list with automatic numbering:** hold down the mouse on the Filing Code field (NOT the title) until the pop-up menu appears, and choose "New"
 - b. **Use an existing Filing Code with automatic numbering:** hold down the mouse on the Filing Code field (NOT the title) until the pop-up menu appears, and choose the name of the Filing Code you want to use
 - c. **Use a new Filing Code without adding it to the list:** hold down the mouse on the Filing Code field (NOT the title) until the pop-up menu appears, and choose "New" while holding down the Option key
 - d. **Use an existing Filing Code without using automatic numbering:** hold down the mouse on the Filing Code field (NOT the title) until the pop-up menu appears, and choose the name of the Filing Code you want to use while holding down the Option key

C. FILE MAINTENANCE

1. **Sort entries by author and date:** choose "Sort" from the "Utilities" menu

2. **Renumber entries to reflect their current order in the stack:** choose "Renumber" from the "Utilities" menu
3. **Search for potential duplicate entries:** choose "Search for duplicates" from the "Utilities" menu
4. **Search the "Source" fields of all entries after (and including) the displayed entry for new journals to add to the list of journals and their abbreviations:** choose "Update Journal List" from the "Utilities" menu
5. **Delete a single entry:** click the "Delete entry" button
6. **Delete a range of entries:** click the "Delete entry" button while holding down the Option key and enter the starting and ending reference numbers for the range of entries you wish to delete when prompted
7. **Edit the Journal List:** choose "Journal List" from the "Utilities" menu, then use the buttons at the bottom of the Journal List card to edit journal list entries
8. **Delete a Filing Code from the Filing Code List:** choose "Filing Code List" from the "Utilities" menu, then click the "Delete a Filing Code" button
9. **Delete all Filing Codes from the Filing Code List:** choose "Filing Code List" from the "Utilities" menu, then click the "Delete a Filing Code" button while holding down the Option key
10. **Specify and save a format for text files you wish to import information from:** choose "Specify Import Format" from the "Utilities" menu and follow the instructions presented
11. **Delete a previously saved Import Format:** choose "Specify Import Format" from the "Utilities" menu and click the "Delete a Format" button
12. **Create and save a format for exporting text:** choose "Create Export Format" from the "Utilities" menu and follow the instructions presented
13. **Delete a previously saved Export Format:** choose "Specify Export Format" from the "Utilities" menu and click the "Delete a Format" button

D. SEARCHING ENTRIES AND SUBSETTING CARDS

1. **Finding text in a specific bibliographic field:** click on the name of the field you wish to search (these are termed "Quick Search" buttons) and enter the text to search for when prompted
2. **Repeating a Quick Search:** click on the name of the field you just searched while holding the Option key down
3. **Finding the selected text in any field:** select the text you wish to find (it can be in any field), and then click on the name of the field you wish to search
4. **Specify criteria for delimiting a subset of entries:** click the "Mark Cards" button (or choose

"Marking Setup" from the "Utilities" menu) and use the buttons to create a criteria list for subsetting; then click the "Mark Cards" button

5. **Creating and exporting a list of the currently marked entries:** click the "Create List" button on the "Marking Setup" card once you have marked a subset of cards. Once a list is created, it can be printed or exported to a text file
6. **Going directly to a subsetted card on the list of marked entries:** click on any entry in the list
7. **Browsing only the cards in the subset:** click the "Browsing Marked Cards" check box; the arrow buttons will now take you only to marked entries
8. **Unmarking all cards (removing the subsetting):** click on the "Unmark All Cards" button
9. **Marking or unmarking an entry manually:** click on the card marking box in the upper right-hand corner of the card for that entry

E. EXPORTING TO TEXT FILES

1. **Exporting marked entries:** select "Export Marked..." from the "Utilities" menu, and then choose an existing export format or create a new format
2. **Exporting all entries:** select "Export All" from the "Utilities" menu, and then choose an existing export format or create a new format
3. **Exporting references and/or the Journal List, the Filing Code List, Import Formats and Export Formats to another Bibliography Manager II stack:** select either "Export Marked..." or "Export All" from the Utilities menu, and choose the "Bib. Man. II File Exchange" export format

SHAREWARE NOTICE

This stack is being distributed as shareware. You may use it on a trial basis for up to 30 days. If you decide to continue using it, please send the shareware fee of \$20, along with your name, address, and any suggestions for improvements, to:

**David Tremmel
901 Chalk Level Rd., Apt. T-14
Durham, NC 27704**

If you have any questions about or find any problems with this stack, you can also contact the author via electronic mail on Internet at:

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