

BIBLIO MENU ...Bibliography Formatter

Bibliography Formatter...

Bookends can automatically rearrange reference data in virtually any style necessary for bibliographies or citation lists. This capability, called formatting, can also be useful in the creation of special reports, such as alphabetized lists of all of the titles with dates. A format is used by Bookends to determine how the selected references (the Hits List) are to be displayed in a bibliography or report.

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Bookends includes over 100 different pre-defined formats. They are located in the Format Bank (accessed from the Biblio menu).

The formatting capabilities of Bookends are accessed via the Bibliography Formatter. An example of how the Bibliography Formatter might appear is:

From this screen you may define Formats, choose a specific bibliographic Format for outputting your Hits, and designate where the bibliography is to be sent. The screen is divided into 3 functional groupings: left, center, and right.

Left

This section deals with outputting the information.

You can choose to send the formatted references to the Bibliography Window (where they may be viewed, edited, printed, or saved) or to a file. The Bibliography Window is limited to approximately 30,000 characters. If your bibliography is larger than this, send it to disk.

You have the option of creating the bibliography with or without styles (multiple fonts, bolding, underlining, etc.). If you haven't used any text formatting or just want to see the list, choose the Without Styles option because it is faster.

If "as HTML" is checked, Bookends will generate a formatted bibliography that is preceded by the <HTML> command and followed by the </HTML> command. This tells a browser that the information in between contains HTML-style information. Furthermore, Bookends will add the appropriate HTML commands to the bibliography so that the references are displayed as you specify. Generating bibliographies in HTML-encoded format is covered in detail in the portion of this manual dealing with Bookends and the World Wide Web.

When you send the output directly to disk, there are several different ways the file can be saved. The type of file used when With Styles is selected (RTF or WordPerfect) is determined by your choice of word processor in Preferences. If the bibliography is made Without Styles, a plain ASCII text file is generated, using the Creator of the word processor specified in Preferences.

Center

This section deals with editing and choosing Formats.

The Output selected refs (Hits) in the format of button lets you choose the format in which the references should be output. The button is a pop-up menu. It displays the formats that are available in a given database:

he pop-up menu contains an alphabetical list of the names of the Formats in the database. To the right of the name, the number of different Types that exist for that format is displayed. Up to 10 different Types are allowed for each Format. This allows the Format to handle citations for books, chapters, journals, newspapers, etc. In the example above, there are five formats, each with two to 4 Types defined.

To view or edit an existing format, choose it from the pop-up format menu and click on the View/Edit This Format button.

o delete an entire Format (including all its Types), click on the Delete This Format button.

o create a new format, click on the Create New Format button.

dialog appears:

new format with the specified name will be created. Note that this format will be identical to the format listed in the pop-up menu above the Create New Format button (in this case, the format is for the J. Exp. Med.). Therefore, before creating a new format, select an existing format (if any) that is closest in design to the new format before clicking this Create New Format button. It is easier to modify an existing format than it is to create a new one from scratch.

You can choose to replicate just the first Format Type (usually Journal article) or all Format Types (which may include, for example, Book, Book chapter, Edited book, etc.). Choose Replicate all Format Types only when the default Format and the one you want are very similar. If you have to do more than a minimal amount of work to design the new format, choose Replicate first Format Type only. You will be able to “clone” your Types to make entry of Type variants relatively easy.

Right

he number of references in the Hits List (selected references) is given.

Clicking on the button Make Bib starts the formatting process.

If you direct the formatted output to the Bibliography Window, this window will be displayed when formatting is done. Clicking on the View Biblio. Window button takes you to the Bibliography Window. Use it to review the bibliography that you last generated.

Format Display

When you click on the Create Format button or the View/Edit Format button you will see the Format window:

he name of the new format (New Format, in this case) is displayed at the top. To its right are arrowheads that take you to the different Types with the same format name. Since a new format has just been created, there is only one Type (Journal).

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When a format is first created, its Type is always set to Journal article. Since any reference in the Hits List for which the Type is not specified (i.e. is left blank) will be formatted according to the first Type defined for any given Format, references with undefined Types will be output in the Journal style.

Holding down the Shift key when clicking on the arrows moves you to the first or last Type of the format.

Formatting Author Names

On the left side of Format display is a section for arranging author names. For these formatting features to work correctly, you must have entered the authors' names properly in each reference: last name, comma, first name(s) or initial(s).

urname Order. The order of the names (surname first or surname last) can be set for authors and editors independently. The column headings (Doe, John and John Doe) indicate the order in which the surnames will be output—surname first or surname last, respectively. The settings for the first author and editor and subsequent authors and editors can be different. If a reference has only one author or editor, the Order designated for First author/editor order is used.

Name Options. This pop-up menu offers three choices:

If Surname & Initials is selected, all names after the surname are truncated to a single letter. For example:

Names	Appears as
Arnold, Mary	
Arnold, M	
Bardot, Jean-Jacque	
Bardot, J-J	
Krieger, K.	
Krieger, K	

If Full Name is selected, the output appears as you entered it, regardless of whether it was a full name or initials.

If Surname Only is selected, only the authors' or editors' surname will be output (any extensions of the surname, such as "M.D." or "Jr.", will also be output if Surname Only is selected).

Punct. After Initial. If you have checked Initials Only, you can specify what punctuation you want to follow the initials in the bibliography. For example, for the name:

Harris, John Edward

Punct. after initial

Results in

·-

Harris, J. _E. _
(nothing)

Harris, JE

.

Harris, J.E.

-

Harris, J _E _

(Note: the underscore character () is used to signify a SPACE).

Authors in ALL CAPS. If this button is checked, the author names are output in capital letters.

Punct. Between Names. The sequence of characters that will separate the names of the authors or editors. Usually, this is a comma or semicolon. Don't forget to include a space after the punctuation.

Separate Last Names With. The last two authors or editors of a citation may be separated with different characters. Common examples include:

Separate last

authors

with Results in

,_and_

Jones, E., Franklin, M., and Stanley, H.

and

Jones, E., Franklin, M. and Stanley, H.

&

Jones, E., Franklin, M. & Stanley, H.

'_

Jones, E., Franklin, M., Stanley, H.

Punct. After Surname. Punct. after Surnames is used to specify the punctuation

separating the surname and first name(s) of an author or editor when the surname is output first. In most instances, this will be a comma followed by a space. Some bibliographic formats (i.e., New England Journal of Medicine) require the names to be output surname, space, first name, while some want a semicolon or no space. In this field, enter the punctuation needed for the particular bibliography format.

Punct. After Surname

Results in

,—

Jones, E.

;—

Jones; E.
(nothing)s

JonesE.

Use 'et al.'. If a reference has many authors, you can have 'et al.' inserted instead of author names. If you check the 'et al.' box, in the first field to the right enter the maximum number of authors in a reference that should be spelled out before 'et al.' is used, and in the second field to the right enter the number of authors that should appear before 'et al.' is used in the finished bibliography citation. 'et al.' isn't used for Editors.

Special Formatting Options

Put title in Title Case. Title Case means that every word (often with the exception of some prepositions and conjunctions) in a sentence or phrase begins with a capital letter: This Is a Title in Title Case. Bookends can automatically convert a title that was entered in Sentence case (only the first word of the sentence is capitalized) to Title Case in a bibliography. To do this, check the Put titles in Title Case box.

Bookends considers a word as one or more characters following a space, hyphen, or open parenthesis. In most cases you will not want prepositions and articles (e.g., "to", "in", "a", etc.) capitalized. Bookends allows you to exclude such words. In the third Preferences page there is a list under the heading Don't capitalize in Title Case. Any words entered in this list will not be capitalized when Bookends converts a title to Title Case (the first character of the title will be capitalized, whether it begins a word that is in the exclusion list or not).

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Bookends will not convert an uppercase character to a lowercase character! This means that Bookends will not erroneously convert uppercase characters to lowercase: for example, DNA will not be converted to Dna). Therefore, if you have entered a title all in uppercase, Bookends will not convert it to Title Case. Titles should be entered in Sentence case.

Remove Journal Periods. This determines if a journal name should be printed with or without periods. In effect, an abbreviated journal name containing periods can be output in two different forms. For example, you could enter journal names with periods:

N. Engl. J. Med.
for the New England Journal of Medicine
J. Immunol.
for the Journal of Immunology

If you don't want the periods printed (e.g., print N Eng J Med or J Immunol), click on the Remove Journal "."s button. If this option isn't checked, the journal name is output exactly as it is entered (or as it appears in the Journal Glossary, if it is entered there).

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See the section on the Journal Glossary for more information on journal formatting

options.

Include Issue # with Vol. Many on-line databases (i.e., Medline, Dialog) include an issue number in parentheses after the volume number. If the Include Issue # with Vol. button is not checked, any data starting with a parenthesis in the Volume field is suppressed and the issue number will not appear in the output.

Use year only for Date. If the Format has the Use year only for Date button checked and the Format order includes a 'd' (date), Bookends will look in the Date field for a year. If it finds one, it will output the year rather than the entire contents of the Date field. A year is defined as a four digit number beginning with a '1' or a '2'. If Use year only for Date is unchecked, the entire Date field is output.

Examples of how dates would be output in a bibliography:

Bibliography generated with

Use year only for Date
Date field

unchecked

checked

1995

1995

1995

Nov 1995

Nov 1995

1995

10/23/93

10/23/93

10/23/93

Monday, Oct. 30, 1995

Monday, Oct. 30, 1995

1995

1989, Sep 15

1989, Sep 15

1989

Format Order

Most of the Format display is devoted to defining how the reference data is to be ordered.

The Order field is where the user determines which specifies which fields are to be output and in what order they will appear. Single letters are used to represent reference categories. A summary of the single-letter codes:

Letter	Category	Letter	Category
a	Author(s) 1 Location		
b	Abstract		
n	Notes		
d	Date Page(s)	p	
e	Editor(s) t Title		

f	Journal (full name)
u	Publisher
i	Issue Number
v	Volume
j	Journal (abbreviated)
y	Type
k	Keyword(s)

Most letter symbols are the same as the first letter of the field they represent. There are three exceptions. Because the first letters Abstract, Publisher, and Type are used for other fields, the second letter of these words is used to represent these fields.

The journal name can be output in two different forms depending on its entry in the Journal Glossary. When Bookends encounters a j or an f in the Format Order, it first looks at the journal name in the reference, then looks in the Journal Glossary to see if this journal name is entered there. If the journal name is in the Journal Glossary, Bookends selects either the short (if a j) or the full (if an f) form. If the journal name isn't in the Journal Glossary, Bookends uses the journal name as it was entered in the reference. See the section on the Journal Glossary for more details.

There is no specific field set aside for the issue number. If you want to enter the issue number of a magazine or journal, enter it in parentheses after the volume number in the Volume field:

Volume 125(10)

To use the issue number in a bibliography format, use the letter "i" (without the quotes) in the Order field. Bookends will use the characters within the parentheses in the format. It will not include the parentheses themselves.

Bookends deciphers Order in a straightforward way. Order is read from left to right. Each character encountered is compared with the reserved symbols listed above. If there is a match,

the field represented by that symbol is output. If there is no match, the character is output exactly as is.

Thus, an Order of

a, t.

displays the author(s) in the order specified, a comma, a space, the title, and concludes with a period.

An Order of

a t.

formats a reference like the first example, except there is no comma following the last author(s) names.

Entering information into the Order field

You can use pop-up menus to enter the categories, punctuation, and special characters. The characters in these pop-up menus that appear in curly brackets will be inserted into the Order field when the corresponding menu item is selected. You can also type these characters directly into the Order field without using the pop-up menus.

The three pop-up menus contain:

Categories

The items in this pop-up menu may be different if you have changed category labels.

Punctuation

ny character preceded by a caret is output as a control character. ^I represents a TAB, and ^M represents a Return. Note that any trailing ReturnS are ignored by Bookends when formatting unless they are specified as ^M (which is a Carriage Return).

The TAB and Return characters are very useful in obtaining an appropriate final look for the bibliography. For example, if you want references to have one blank line between them, you should end the Order with ^M.

Similarly, you may want a “hanging indent,” such as:

1.
James, J. E., Randolph, R., and O’Leary, F. Taxing times. The Financial
Advisor. 13:123-142 (1988).

To do this, begin the Order with ^I. When the Bookends-generated bibliography is then loaded into word processors with the rulers set appropriately, the references will automatically appear with a hanging indent. See Appendix E for details concerning specific word processors.

Special Characters

In addition to the reserved letters, there are several modifiers you can use to further manipulate the information. These are contained in the Special Characters pop-up menu:

Character	Meaning
\$	The “quote” function. Any characters between two dollar signs are output as is, without any parsing.
#	The sequential reference number (e.g., the # symbol would be replaced with 3 for the third reference in the Hits List).
%	The true reference number (e.g., the % symbol would be replaced with 56 when the 56th reference in the database is printed).
@	If the “at” character (@) is encountered when printing the Bibliography Window, a new page is begun. This is useful,
for	example, if one wants to print formatted references
containing	a, t, j, v:p-. b@
&	Used in format when one wants the unique ID number to be output.
\$\$	This will cause the \$ sign itself to be output. For example,

\$The price was \$\$54.44.\$

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In a bibliography format it is common to label the editors with, for example, “Ed.”, “Editor:”, etc. In Bookends, this is done by surrounding the label in dollar signs (\$). To ensure that the label is singular when there is only one editor, and plural when there is more than one editor, insert two plus signs (++) where the “s” should go. When Bookends encounters the plus sign it will determine how many editors there are in the reference and add an “s” when appropriate.

For example, the following format

(\$Ed++. \$e)

could yield

(Ed. R. Roberts) [one editor]

or

(Eds. R. Roberts, W. Smith) [two editors]

The formats in the Format Bank that insert a label for editors make use of this capability.

Make Another Type

Type has the same meaning it has in each reference. It denotes the kind of reference for which this format is meant. To allow for the fact that references require a different form for each type of publication (i.e., book, journal, dissertation), a set of formats to be used for a single bibliography style can be created by specifying different Types.

This button creates a new format with the same name as the format displayed. The format will be identical to the previous format, except the Type entry will be empty. Use the Type pop-up menu to enter a new designation, or use the keyboard to enter a one letter designation in the Type box.

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The first Type of a format is always the Journal type.

Up to 10 Types can exist for each format.

Bookends reserves the following Type designations:

=	j
=	journal
=	o
=	conference proceedings
=	b
=	book
=	m
=	map
=	c
=	book chapter
=	a
=	artwork
=	e
=	edited book

v
=
audiovisual materials
d
=
dissertation
t
=
letter
n
=
newspaper
p
=
personal communication
i
=
in press

Any other character can be used to create a user defined Type. For example, to create a new Type, First Edition, use the letter 'e' for the Type in both the reference and the format. When the reference is formatted, Bookends will match the 'e' reference to the 'e' format.

Bib & Document Options...

here are a number of options that must be specified to generate a correctly formatted bibliography. Furthermore, a number of options are available to make the best use of Scan a document for citations.

Clicking on the Bib & Document Options button brings up this dialog:

Bibliography Options

These settings work in conjunction with Scan a Document for Citations to ensure that the final bibliography adheres to a publication's specifications. They are also used when one creates a Hits List and then clicks on the Make Bib button in the Bibliography Formatter.

Number references—if checked, references in the bibliography will be numbered sequentially, starting with 1.

Alphabetize references—if checked, the Hits List will be alphabetized before the bibliography is generated.

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Bookends will automatically sort the Hits List by Author and then Date. If you want the bibliography sorted in a different order, uncheck the Alphabetize references button in the Format, Scan the document without generating a bibliography, Choose the Hits, configure the Sort Hits menu item in the Hits menu as you like, and generate the bibliography by clicking on the Make Bib button.

Use 'Ibid.'—Some formats for citations in the humanities require the use of "Ibid.", an abbreviation of the Latin *ibidem*, meaning "in the same place". Ibid. (with the period) is used when two references to the same work follow one another without any intervening references. This is often used in footnotes rather than in bibliographies.

To have Bookends insert "Ibid." (without the quote marks) in a bibliography, check this option. When a bibliography is generated with this format, Bookends checks to see if the same reference is used in successive citations. If so, Bookends substitutes the word "Ibid." (without the quote marks) in place of the second citation.

If an identical work is used in successive citations but the page numbers differ, Bookends will replace the second citation with the word "Ibid." followed by a comma and the page (or page range) of the second citation, e.g.

1. Jones, M.E., 1996. War and post-war. (Barton and James, MIA). 34.

2. Ibid., 56.

For two different references in the database to be considered the same source, the following fields must be identical: Authors, Editors, Title, Journal, and Volume.

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When the Use 'Ibid.' option is checked ON, the Scan a Document option is also affected. Usually, when a reference is cited more than once in a document, Bookends assigns it only one place in the bibliography. When Use 'Ibid.' is checked ON, however, Bookends will create a new place in the bibliography for every occurrence of a citation to that reference (and use Ibid. in all but the first occurrence when the citations are successive).

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