Contents

Creating and using a bibliography

The contents of the bibliography are maintained by the program regardless of closing, opening and creating new files.   Thus you can compile a bibliography from several source databases.

Select the reference(s) you wish to add to the bibliography and choose **Reference, Add to bibliography**. If the Bibliography was previously empty, a bibliography window will be automatically created.

References currently in the bibliography are shown a different colour from the others.   In the bibliography window, different coulouring is also used.   Coloured references are also to be found in a currently open file, whereas normal colouring indicates that the file this reference is from has been closed, or the reference has been deleted from that file.   Either way, the bibliography has the sole remaining copy of the reference in memory, and deleting it will be permament.

To remove references from the bibliography, select the bibliography window.   You may now use **Reference, Delete** as usual to remove the references.   However, in this case the references are not removed from memory unless they are not from any of the currently open files.   If the deletion results in the bibliography becoming empty, the bibliography window is automatically destroyed.

To empty the bibliography, simply close the bibliography window.

The bibliography window can display its contents in two ways; either as a reference database very similar to normal database windows, or as formatted text for editing and copying to the clipboard.   You can toggle between these displays with the **Options, Display formatted bibliography** command.

Depending on the state of this toggle, you can save the bibliography contents as either a database or as a standard text file, using **File, Save As**.

New bibliography formats can be created and entered in REFS.INI using Notepad.   See bibliography format syntax for details.

Introduction

Welcome to Refs, a program for creating, maintaining and searching academic reference databases.

In this help file, paragraphs preceded by [keyboard icon] concern keyboard use only.   Paragraphs preceded by [mouse icon] concern the mouse only.

Refs provides a user-friendly interface for handling Unix-style reference databases.   It provides the following features:

1. Multiple Document Interface support allowing bibliography construction from multiple sources
2. Import databases from other formats
3. Create bibliographies which can be saved as text files, refer files, or pasted into other applications
4. Store data in the following fields: Author(s), Title, Date, Journal, Book Title, Report, Issuer, Editor, City, Volume, Number, Pages, Keywords and Abstract
5. Single or multi-column display options.
6. Easy Cardfile-like keyboard operation.

There are four main window types in Refs:

Database windows:

Each database window contains a single database file.   This is where results of searches are displayed, and where the contents of databases can be modified.

Bibliography window:

This is where the bibliography is displayed, in either database or plain text format, and from where it can be saved to disk or copied to the clipboard.

Reference form:

This appears when you ask to view or edit a reference.   It displays the authors and date of the reference in the title bar, and contains edit fields for the various fields of the reference.

See <u>Editing references</u>

Author form:

This is used to edit the author or date fields of the reference that make up its title in the reference form, and also to specify the reference type (book or journal).

About Refs 7.1

Please send any bug reports, registrations or suggestions to any of the following addresses:

tjrc1@cus.cam.ac.uk

or by snail mail:

T. J. R. Cutts
194, Vinery Rd.
Cambridge
CB1 3DS
UK

You may also phone me at home on (+44) 223 572622 (note this has changed since Refs 6.32), though please make it a sensible hour of the evening.   I won't be very polite if Bloggs calls from LA at 4am...

When reporting a bug, please tell me the following:

a)   What you were attempting to do; if the bug is not reproducible I won't be able to find it!
b)   How much memory was free
c)   What the error was (Runtime error numbers and/or address at which the error occurred)
d)   Program version number
e)   Anything else that might be even remotely relevant

Changes since Refs 7.0

3D look now provided by CTL3D.DLL rather than BWCC.DLL, for reasons of consistency with other versions of Windows.

Bug in Main List options fixed.   Behaviour of all dialogs adjusted and improved.

Sorting changed: 'van de Graaf' now comes before 'Watson', whereas it used to come afterwards (case sensitivity has been removed during sorting).   Sorting now also utilises your language driver, so will sort in a manner appropriate to your Windows language setting.

Mats has vastly improved IMPCHEM.DLL

Changes since Refs 6.32:

Lots of them!   This is a major change, possibly the biggest in any release of Refs.

MDI Interface, and associated cut/paste between bibliography windows.   This has resulted in two new drop-down menus, Edit and Window.

Edit form changed considerably:
        1) Journal title box is now a drop down combo box to allow storing of frequently used journal names
        2) New '**Ok and New**' button, for rapid entry of multiple references.

Bibliography menu removed (functions either moved elsewhere or are now obsolete).

Bibliography now consolidated to a single window, with formatted and list display toggle.

Many file menu options are now obsolete and have been removed (such as 'save displayed references').

Various and sundry bugs fixed: Reference sorting, dialog behaviour.

Bug in IMPMED.DLL fixed.   It doesn't ignore the abstract any more.   :-)

New IMPCHEM.DLL for Chemical Abstracts, from Mats Valli.   Many thanks, Mats!

Licence and Registration Information

This piece of software is shareware.   It is **not** public domain, or freeware.   Versions up to and including 0.4 were freeware beta releases.

The Refs is fully functional when unregistered, except for a limit on its capacity of 100 references per database window, and only two open database windows per program instance.   Refs will load and display files larger than 100 references, but you will not be able to add new entries to such files.   This should give you some time to evaluate its usefulness for you before you run out of entries.

You are licensed to copy and distribute the unregistered version freely as long as you distribute the following files together:

> REFS.EXE
> REFS.HLP
> REFS.INI
> IMPBIDS.DLL
> IMPMED.DLL
> IMPCHEM.DLL
> CTL3D.DLL
> INSTALL.EXE
> INSTALL.INI
> TEST.REF
> README.TXT

and make no charge other than reasonable duplication costs.

Important:

This software comes under no warranty whatsoever, expressed or implied.   The author cannot be held responsible for any loss occurring during the use of this program, directly or indirectly.

Registration:

The registration fee is £30 sterling, by cheque drawn on a UK bank, or International Money Order.   My apologies; I cannot accept VISA or MasterCard registrations.   Registration gets you:

i)   A registration number to remove the unregistered limitations.
ii)   Your registration fee covers a single-user copy of the program.   **You may not distribute the registered version to any other persons.**   Network administrators wishing to register Refs for multi-user use should write to me for details.

My address can be found in the about section, as can information about the current state of development and plans for future versions.

How To Do It

How to...

[Add a new reference](#)
[Edit a reference](#)
[Delete a reference](#)

[Search for references](#)
[Create and manage a bibliography](#)

[Print a reference](#)
[Transfer information to other applications](#)

[Import references from a foreign file format](#)
[Add or remove import libraries](#)

[Customise Displays](#)

Adding/removing import DLLs

The Import feature of Refs 6.x and later is designed to be easily expandable with new formats.   I will release these DLLs as they become available.   So far I have covered Medline (for our American friends) and BIDS for us Brits.   Medline is more or less untested, so I would be pleased to hear if it works or not. This help file also contains information for programmers wishing to write their own import DLLs.   See Import DLL Interface   for details.

Letting Refs know about new DLLs is easily accomplished.   Edit REFS.INI.   Click the notepad icon below to do this now: (this will only work if REFS.INI is located in a directory called C:\WINDOWS)

The [Import] section should look similar to:

```
[Import]
Filters=2
1=IMPBIDS.DLL
2=IMPMED.DLL
```

So to add/remove an import DLL, add or remove its name to or from the list, and adjust the Filters value appropriately.

Please note:

a) 'Filters' should always return the number of entries that follow.   Any more and there will be errors.
b) The order of DLLs in the INI file is the order in which they will appear in the list box of choices.
c)   The numbered list must run from 1 up to the number of DLLs - numbers must not be missed out.

Importing other database formats

Refs can theoretically import references from any text-based reference file format.   Each format needs to have an import DLL written for it (such as IMPBIDS.DLL), to deal with the foreign format.   These DLLs should be listed in the [Import] section of REFS.INI.   Refs can deal with up to 65,535 foreign formats.   At present, I have written such DLLs only for ISI (BIDS) and Medline.   A DLL for the Chemical Abstracts format is also included, written by Mats Valli.

1. Select **File, Import...** and a dialog will appear listing the available formats known by Refs.   Select a format, and choose **OK**.

2. Some DLLs may have an options function.   Choosing the **Options** button will allow you to call this function if it exists.   This typically displays version information and allows you to modify the filter's behaviour.

3. Choose **OK**

    Double-clicking the desired format will also close the dialog box, as if you'd selected it and then clicked **OK**.

4. Select the file to import in the next dialog box.

5. Refs will then import the file as well as the DLL can manage.   Imports may well lose some information, depending on the capabilities of the format being imported.   The imported file will appear as a new database window.

Programmers wishing to write their own import DLLs are referred to the Import DLL Interface section.

How to find a reference:

1.   Select the database you wish to search

2.   Select **New search...** from the **View** menu, or press **F3**.

3.   From the **Search By** combo box choose the type of search you wish to perform.

4.   In the **Search For** box type the string you wish to search for.

5.   Choose **OK**.   The main window will then show all references matching your criteria.

The status bar will show how many references were found and the criterion used.

6.   You're not content with the results?   Too many references?   You can restrict the search, by now
         selecting **View, Narrow search...**   This will repeat steps 2-4, but this time will perform the search
         only on those references you found last time (i.e., those which are currently displayed).

         Too few results?   What if you want those references with either DNA or RNA in the title?   You
         could search for NA, but this would turn up all sorts of junk.   Instead, search for DNA, then select
         View, Expand search...   Again, this repeats steps 2-4, but this time search for RNA.   The existing
         search is kept and any new references found which are not already in the list are added to it.

How to add a new reference:

1. Choose the database to which you wish to add the reference

2. Choose **Reference, New...** or press **F7**.

3. A dialog box will appear for you to enter author and date for the reference. The Author field *must* be filled.   The Unix refer format does not require this, but since the program sorts by Author name before sorting by year and then title, it's fairly important!   Besides, *somebody* must have written it!

4. Select one of the option buttons for the document type.   Journal is the default (although this can be changed).   The only difference this makes is to save a %J, %B or %R field.   See <u>technical notes</u> for more information on Unix refer file field identifiers.

5. Choose **OK**

6. A second dialog box will appear for you to enter the title, journal or book title as decided in Step 3, and notes for the current reference, as for <u>editing a reference</u>.

How to edit or view a reference:

1. Select the reference you are interested in and then select **Reference, Edit...**

Double-click on the reference you are interested in the main list.

Press **F6**.

2. Choose **Cancel** to go back to the main list, or **OK** if you want the reference to be updated to its current displayed contents (i.e. if you've just edited it).   You can also choose **Ok and New** which will update the current reference and go straight to a new author entry screen (as if you'd chosen **Ok** and then **Reference, New**.

NB: You cannot edit or view a reference if more than one is selected in the main list.

You can edit REFS.INI so that your most frequently used journals are listed in the drop down combo box, so you can choose one with the mouse.   This also encourages consistency.   To add your own journals or remove those in the default list, simply edit the [Journals] section of your REFS.INI file.   This is fairly self explanatory.

If you wish to change the author, year or document type (book or journal) you cannot do this from the standard reference form you have just called up.   To do this, close the reference form:

Hold down **Ctrl** and double-click the reference.

Select **Reference, Edit author...**   or press **F2**.

Please note:

(a)   Windows multi-line edit controls all allow carriage returns to be entered using **Ctrl+Enter**.   **Do not do this!**   If the field accepts carriage returns (without using **Ctrl+Enter**), then you may insert them. In other fields, using **Ctrl+Enter** will cause confusion when saving the file, and text following the carriage return will be reloaded as part of the abstract!

(b)   If you wish to insert tab characters in your abstract field (or any other field), you must use **Ctrl+Tab**, since **Tab** alone moves the input focus to the next control in the dialog.

(b)   To enter unsupported fields such as %0 (other) just type them **on a new line** in the abstract field. For instance if the abstract edit box when viewing the reference contains:

```
This is your abstract.¶
%O spong
```

This will produce the correct refer file of:

```
%X This is your abstract.
%O other
```

Be careful of duplicating entries this way.   If you put a %T field in here, and your title field has something in it, both will be saved as %T lines.   When this is next loaded by Refs, the second %T entry (the one in the abstract) will be ignored and subsequently lost!   I don't know how other programs would behave. This is the case for all duplicated fields, except %A (Author), which is duplicated for each author anyway.

(c)   The Keyword field should have your keywords on separate lines, without blank lines between them.   The same applies to the author field.   Each author should occupy a separate line with no blank lines.

How to delete a reference

Select the reference(s) you wish to delete.

Then press **Del(ete)** or select **Reference, Delete**

How to print references

This is not yet possible directly.   However, an interim solution is to paste a bibliography into Notepad and print that, or print a .REF file using Notepad.   It's plain text, and is a fairly readable format.   Refs also saves it in a reasonably logical order; Authors and Title followed by the other fields, and the Abstract last. Refs also saves the file in alphabetical order of primary author.

Transferring information to/from other applications

Transferring information to word-processors is best done as follows:

1. Add the references you want transferred to the bibliography
2. Choose a format for display
3. Display the formatted bibliography
4. Edit it if you wish
5. Select as much as you wish to copy,   in the bibliography window
6. Choose **Edit, Copy** to place the selected information in the clipboard
7. Now you can paste it into any application that supports text pasting from the clipboard

You can also cut and paste directly to any edit box, in any either the reference or author forms:

Select the text you wish to copy, or place the insertion point where you wish to paste.

Use standard Windows Cut/Copy/Paste keys.   These are:

Cut: Ctrl+X
Copy: Ctrl+C
Paste: Ctrl+V

In the reference form, there is also a menu for this purpose.

Customising the displays

Options, Main list...

Options, Input... Allows you to specify the default date used when creating a new reference, and the default source for references (book or journal).

Options, Bibliography format... Choose how references will be formatted in the bibliography window. See bibliography format syntax for details.

Options, Bibliography colour... When a reference has been added to the bibliography, it changes colour in the main list.   Use this dialog box to choose what that colour should be.

Bibliography format syntax

These formats are stored in REFS.INI.   To create a new format, or change an existing one, edit REFS.INI with Notepad.   Click the notepad icon below to do this now:

In the **[Formats]** section add a line like:

```
Journal=<A[N]@, ><T@, >< J@, ><V@><N/@ ><P@ ><D(@)>
```

'Journal' is the name that will appear in the **Bibliography format...** dialog combo box.

Fields begin with a <.   The next character must be a valid field identifier character.   If this field exists in the reference, the other characters in the field will be printed until a > is encountered, otherwise parsing continues after the next >, so the field is missed out.   The symbol @ indicates where in the field to insert the field text itself.   To insert a literal @, < or > without using their special function, precede them with a \.   \\ will produce a single \ in the formatted text.

The uppercase letters ATJIECVNPDKX have the same meanings as they do as field tags in the Refer file format, except J which returns %J, %R or %B fields depending on the reference source.   See Technical notes for an explanation of the tag meanings.   They are fairly self evident.   Other characters are literally copied, so if your reference has Date field of '1992', `<D(@)>` will produce '(1992)' when formatted, and nothing if the date field is empty.

'A' may be followed by a number 1, 2 or 3, which correspond to the three Author formatting options available in the Main List Options dialog.   For example, `<A1@>`.

There is no way to create bold or italic type, since Refs formats ANSI text, as used in Notepad.   However, if you are creating bibliography files for TeX, it *is* possible since TeX uses plain text source files, and I have included an example TeX format line in REFS.INI.

List Options Dialog

There are two panels to this dialog.   The left hand panel governs how the references are displayed in the main list; how wide the column for author names is, how many author names to display, and whether to also display the title of the reference.

The right hand panel governs the behaviour of the main list box, rather than its appearance.   There are three radio buttons giving progressively higher levels of warnings when deleting references.   Such warnings never appear when deleting references from the bibliography, only when deleting references from the currently loaded file.

The **Select new items** check box controls whether a newly created reference is automatically selected afterwards.

These settings are stored on a per window basis.   The last choices made determine those saved to the REFS.INI file, and also will be the options the next created window will have.

The Chemical Abstracts Import DLL

The following notes are from Mats Valli, regarding the Chemical Abstracts DLL:

Chemical Abstracts (CA) is not consistent in the way references to reports, books and patents are stored. Therefore only journals will be imported correctly, that is the Pages, Vol, VolNo and Journal are separeted. For other types of references all this information is stored in the Journal field.   I will try to work this out in a later version.

When searching CA the following command should be issued before starting the search:
SET HIGHLIGHTING OFF

When displaying answers in CA the command D BIB ABS KW or D ALL should be used.

This DLL requires about 20K of free RAM to work. If this is not availible an error message will appear requesting more memory.

If data fields are longer than the DLL allows they will be truncated and a message will appear saying so.

Technical notes

This program was written in Turbo Pascal for Windows 1.5, and requires Windows 3.1 or higher to run.

The central database structure has a maximum capacity, in the registered version, of 262,140 references in Standard mode, and something over 4.1 million references per database window in 386 Enhanced mode.   You will certainly run out of memory before reaching this limit!   The **About** box in the program tells you how much memory is free.

There are restrictions, unfortunately, that are imposed by Windows 3.x.   You are only allowed 8,192 entries in a List Box, so searches going over that will stop being displayed when the list box is full, though they will still be in the search results.   I do not know whether this restriction applies if the program is run under Windows NT.   You should also be aware that displaying all the references can take some time with large files (of several hundred references or more).

Huge data files will be slow to search by the current program, and this is probably better done with a program such as WinRefer which maintains indexes to make this faster.

At present I have arbitrarily imposed a maximum length of 8K to each field.   This should be enough for most purposes, I hope!

Files are saved in the common Unix refer format.   This means that databases created by this program can be used with Unix refer, and bibliography programs such as WinRefer.   The order of fields is not important.

Fields currently supported explicitly by Refs are:

%A	Author
%T	Title
%J	Journal
%B	Book title
%R	report (used for unpublished documents)
%I	Publisher
%C	City of publication
%E	Editor
%V	Volume
%N	Number in volume
%P	Pages
%D	Date
%X	Abstract
%K	Keywords

The above meanings are as described in SunOS 4.1.3 manpage refer(1)

Fields not included in the above list can still be entered in the database;   see <u>editing references</u>.

The major fields not covered explicitly are:

%O	other (appended)
%Z	ignored

Such fields, when encountered in files, will appear in the abstract field, but will be saved correctly.   If anyone knows of other less common fields (those listed here are all the ones I know about), I would be glad to learn about them.

Import DLLs are loaded at run-time.   The DLL interface structure is included in this help file for any programmers wishing to write one.

Import DLL Structure and interface

Import DLLs consist of four exported functions.   Three are compulsory, one isoptional.   These are as follows:

```
function WhoAmI: PChar;
function GetSpecs: PChar;
function LoadRef(AParent: HWnd; F: PText;INIPath: PChar): PImportRef;
```

Optional:

```
procedure Opts(AParent: HWnd; INIPath: PChar);
```

Please upload any import DLLs you write... others might find them useful!   Or send them to me, and I will include them in the next official release of Refs.

function WhoAmI: PChar; **export;**

This returns a PChar (LPSTR for you C fans) pointing to a null-terminated string describing the DLL. This is the string that gets inserted in the choices list box.

function GetSpecs: PChar; **export;**

This returns a pointer to a special string that will be referred to in the *lpstrFilter* member of a *TOPENFILENAME* structure that will be passed to GetOpenFileName.   See   your compiler documentation for details.   IMPBIDS.DLL has the following code for this function:

```
function GetSpecs: PChar; export;
begin
  GetSpecs := 'ISI text file (*.isi)'+
    #0+'*.ISI'+#0+'All files (*.*)'+#0+'*.*'+#0#0;
end;
```

```
function LoadRef(AParent: HWnd; F: PText; INIPath: PChar):
PImportRef; export;
```

PText is a far pointer to a Pascal variable of type text.   Sorry, C programmers.   You'll have to find out exactly what the structure of this beast is.   Besides, if you're not writing DLLs in Pascal, you're missing out - it's a piece of cake!

The file F^ will be open, and LoadRef must load a single reference at this point, and fill a TImportRef structure with the new reference.   You then return a pointer to this structure.   REFS.EXE will copy the data, so you may dispose of it in another procedure (or next time LoadRef is called, which is the way both IMPBIDS and IMPMED do it).   LoadRef is repeatedly called by Refs until you return a non-zero Result member of the TImportRef.

If you need to load any options, INIPath gives the path to REFS.INI

procedure Opts(AParent: HWnd; INIPath: PChar); **export;**

This is your optional procedure.   If this procedure is not present, Refs will display a message box to the user saying so when the **Options** button is chosen, otherwise Opts is called, and you are free to display an options dialog box for your DLL, using AParent which is the REFS.EXE main window handle.   Bear in mind that your DLL will be freed before being used again to import a reference, so any options should be saved to an INI file.   You may use REFS.INI for this purpose.   The path to REFS.INI is given by INIPath.

```
TImportRef
```

This is declared by Refs as follows

```
type
  PImportRef = ^TImportRef;
  TImportRef = record
    Result: Byte;
    RefType: Byte;
    Authors: PChar;
    Date: PChar;
    Title: PChar;
    Journal: PChar; {Or book title, depending on RefType}
    Vol: PChar;
    VolNo: PChar;
    Pages: PChar;
    Text: PChar; {Abstract}
    Keywords: PChar;
    Publisher: PChar;
    City: PChar;
    Editor: PChar;
    SortStr: PChar;
  end;
```

Result should be filled as follows:

0	Reference read, file not yet exhausted, carry on reading
1	Reference read, end of file reached, stop reading
>1	Other error, stop reading, do not create a reference from this TImportRef.

RefType:

0	Journal (%J)
1	Book (%B)
2	Report (%R)

Other values will result in problems.

The other entries should contain pointers to null-terminated strings, or a value of 'nil' (or NULL in C-speak). There are some rules:

Keywords and *Authors* fields:

The individual items should be separated by CRLF, otherwise Refs will make errors saving and displaying the references.

SortStr is ignored, at present. Refs will fill this itself, on copying the structure.