



**Latest Additions**  
to the  
**Literature Management System**  
of Terrestrial Systems Ecology Group  
**ETHZ**

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Abstract: The following text describes some latest changes, which were made to the literature management system as it is in use by the Systems Ecology Group at ETH Zurich. It complements the previous manual (FISCHLIN & NEMECEK, 2001).

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## 1. Latest changes and new features

A lot of changes were made to our literature management system since its original design and inception in 1989. Whenever there is a conflict between the previous manual (FISCHLIN & NEMECEK, 2001) and this document, this document overrides the previous manual.

In previous versions a large number of menu commands were offered in the *FileMaker* menu *Scripts*. This is no longer the case. Efforts were made to simplify the user interface and to offer only the most important and most often used commands. Note, the changes were also kept to a minimum to stay as compatible to previous versions as possible. Most menu commands, now hidden can still be used<sup>2</sup>. Note, this is not the case for the scripts<sup>3</sup> used for the following two features: (i) the feature to export records to an *EndNote* bibliography with master rights and (ii) the feature to split your *LiteratureMY* into several smaller files *LiteratureSmallMY*. These features are very complex and error prone and little used. Thus, they are no longer maintained and they probably contain bugs, since their support of the newer features such as reading pdf- and war-files has not been tested with these scripts at all.

New scripts were added, wich support the use of the literature management system in present times. The situation has changed considerably since this system has been designed originally in 1989. Services like the "Web of Science" and the fact that now most journals make articles available in form of pdf-files have changed significantly the environment in which we work. For instance it is no longer expected you only export records to *BibDesk* or *EndNote*, but don't import any from such bibliographies. On the contrary. The current system supports you in importing records via *BibDesk* and/or *EndNote*. Since many services like "Web of Science" or Journal web sites offer the export of information to *BibDesk* and *EndNote*, this has now become the standard technique to bring data into your personal *LiteratureMY* data base file. Notably *BibDesk* is very powerful and can create proper cite keys automatically and even more conveniently than the *FileMaker* data base can. Yet, as a data base *FileMaker* remains unsurpassed.

The latest changes described in this document<sup>4</sup> take all these developments into account and offer a more efficient management of personal references for storing and retrieval, e.g. while writing papers including the writing with *TEX*, i.e. typically with *LaTEX*. The new *LiteratureMY* makes it now possible for you to jump directly to an article in the internet and read it. Of course this requires you are currently connected to the internet at ETH Zurich (or you) have otherwise a valid subscription to the journal of interest.

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<sup>2</sup>Unless their name is marked with '(internal)'. You should never call an internal script directly unless they are also marked with 'button' like in '(internal, button)' or '(button)'

<sup>3</sup>These scripts are marked with '(use at own risk)'

<sup>4</sup> As of this writing *FileMaker Pro Advanced* 12.0.5 to 14.0.3, *EndNote X7*, and *BibDesk* 1.6.4 under OS X Mac OS X 10.7.5 (Lion) to 10.11.x (El Capitan). Most of this text is still valid for the *FileMaker Pro* 6.0.4 running under earlier Mac OS versions including Classic up to version 10.6.8 (Snow Leopard). However that *FileMaker Pro* 6.0.4 version is no longer maintained (frozen at version 3.6r21). Version 3.7 or newer uses exclusively .fmp12 format of the FileMaker data base files, which require at least *FileMaker Pro* 12. Our system does not support the inbetween format .fp7 for FileMaker Pro versions 7 to 11. Note, *FileMaker Pro* 12 is the last still running under Mac OS X 10.6.8 (Snow Leopard).

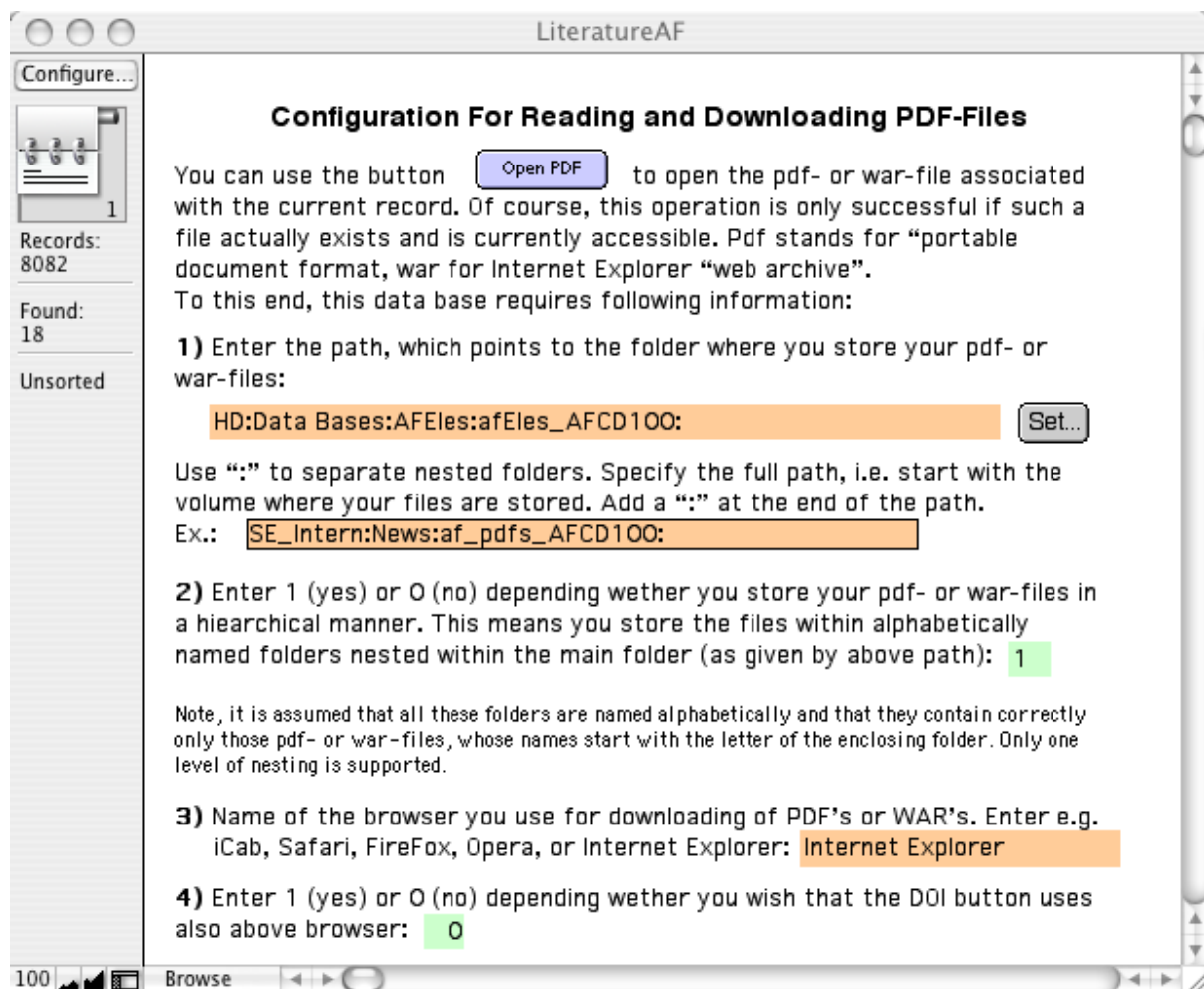
A cornerstone of our system is the support for the management of a personal reprint collection which consists typically of a personal repository of pdf-files. Such a personal collection can be extracted anytime conveniently to a web site, an iPad, or burnt to CDs or DVDs in a format that is platform independent and reading requires only a browser and/or a pdf-Reader. If you annotate pdf's also on an iOS device such as an iPad, our system offers techniques to sync those annotations back to your main personal pdf repository.



## 1.1. Support for reading pdf and web archive files

It is now possible to read directly from within your data base *LiteratureMY* pdf-files (*Adobe Reader* portable document format), war-files (*Internet Explorer* web archives), and webarchive-files (*Safari* web archives). This requires to store the files under the same name as the main key (field *SECode*), e.g. *Fi103.pdf* or *Fi103.war* or *Fi103.webarchive*.<sup>5</sup>

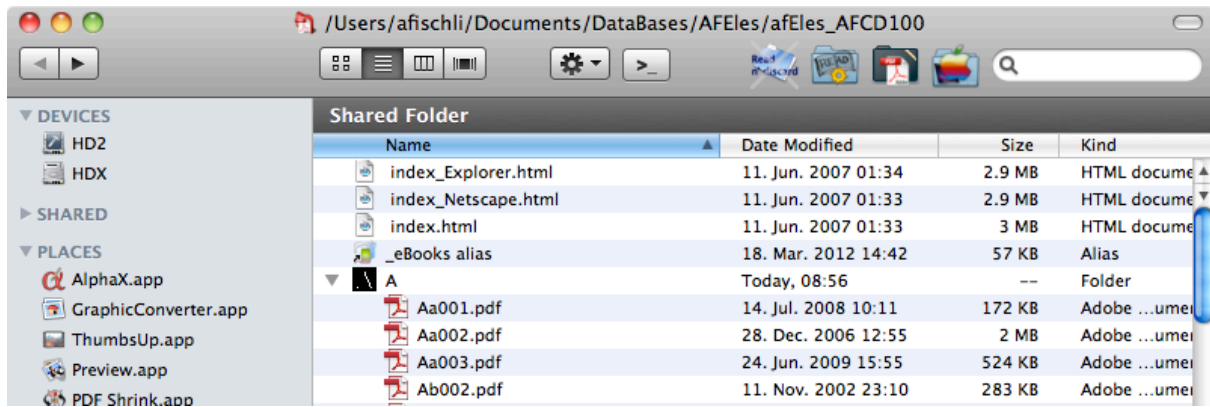
Typically you will store mostly pdf-files. The first time you attempt to access a pdf-file by clicking e.g. onto the button , you are asked to specify the path to the directory where you have stored your pdf-files with the following dialog:





Use the button  to specify the directory where you store your files or enter the path in text form into the ochre field to the left of the button.

If there is a 1 in the green field: , *LiteratureMY* expects you to have the pdf-files stored in a 1-level hierarchical file structure, similar to this:

<sup>5</sup> This can also be conveniently done using keyboard shortcuts. See Section «Helper scripts» on how to make use of such a feature.



For a hierarchical structure, have a folder for each letter of the alphabet, as shown above for the letter 'A' to store all files starting with the corresponding letter. This is the recommended technique to store your pdf-, war-, or webarchive-files. On our server there is an archive *XY\_pdfs.sit* available in *Lit SE Aux Files 1.7r9* (or later). Unpack it and you get conveniently a folder with the needed folder structure.

The two buttons   serve to open pdf-, war-, or webarchive-files. Both buttons behave very similarly. They differ only if you have a pdf-file as well as a web archive file for the same record. Then the first button opens the pdf-file and the second button opens the web archive file. In all other cases they open whatever is available.<sup>6</sup>

Note, in some layouts the buttons to open pdf or web archive files are only visible, when there is actually at least a pdf or web archive file available.

There is also an AppleScript *pdfwar - Store In Letter Folder.scpt* of *Did\_autofile.scpt* in folder *Folder Actions* available. Move one of them, preferably *Did\_autofile.scpt*, to folder *~/Library/Scripts/Folder Action Scripts/* and activate the script for the folder where you store your pdf or web archive files by Ctrl-clicking onto that folder. The result will be that each time you move or drop a pdf or web archive file onto that folder, the file will be automatically stored away in the proper subfolder depending on the name of the file. To disable this feature anytime, simply Ctrl-click the folder and configure it differently.

Information on the last two options shown in the layout *Configure PDF/WAR reading/downloading* are explained in the following sections of this document:

«Downloading pdf and creating web archive files»

«DOI - Digital Object Identifier»

<sup>6</sup> Here is assumed that you have either a war-file (*Internet Explorer* web archive) or a webarchive-file (*Safari* web archive), but not both present.

## 1.2. Common auxiliary data base file for journals (*Journals\_at\_ETHZ\_SE*)

Electronic journals become more and more important. Our literature data base supports the use of electronically published scientific articles in many ways.

First, there is a new repeating field, called *URL*, in the auxiliary data base file *Journals\_at\_ETHZ*. It contains the journal's universal resource locator, typically a web address. The same field is now also shown in the *LiteratureMY* data base under the heading *J URL* in the upper right corner, e.g. of the standard layout. Thus, it is convenient to access the web site of a journal by using one of the light blue buttons<sup>7</sup> which will open the *J URL* visible in the field right beside the buttons.



There are actually two journal URLs provided (repeating field *URL*). The first is the link to the main web site of the journal, typically the current issues. The second one is for accessing back issues, since they are sometimes available only from a different web site, e.g. JSTOR.

### 1.2.1. DOWNLOADING PDF AND CREATING WEB ARCHIVE FILES

Note, if you use the light blue buttons **Curr. Iss.** or **Back Iss.** you have several advantages:

- 1 The URL will be opened by a browser of your choice<sup>8</sup>, which is by default *Internet Explorer* or *FireFox*, regardless of your current system-wide browser settings. This offers the benefit that you can use a specialized browser for the downloading of pdf- or war-files. For instance *Internet Explorer* is fully configurable (see below).
- 2 The main key of the current record is in the clipboard. Simply paste it wherever you like. Typically it is used for naming the pdf-file you download via the *Explorer*.
- 3 The entry *myEle* is entered for you into the owners field should this be empty.

The Internet Explorer offers the most power for configuring downloading<sup>9</sup>. It can be configured to handle pdf-files (File Helpers) as follows:

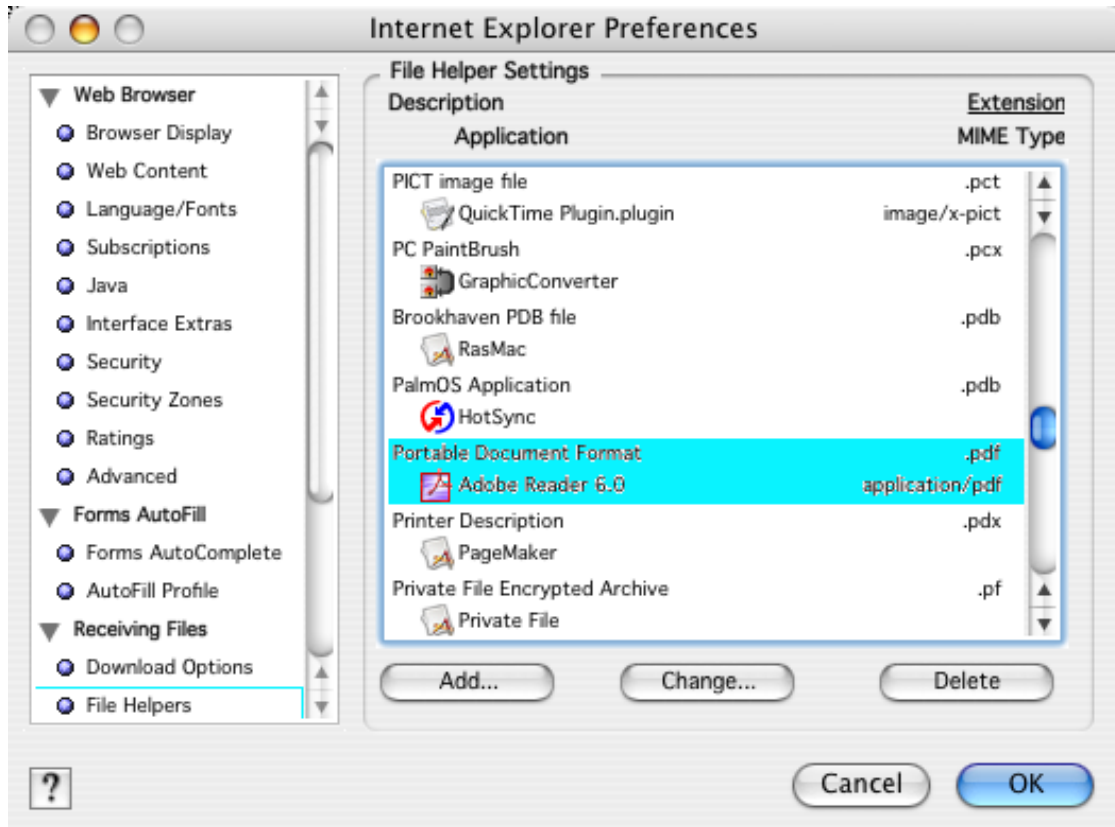
<sup>7</sup>Alternatively you could also Command+double-click into the *J URL* field. Then your default browser will be launched instead of the "Internet Explorer" and the clipboard will of course also remain untouched.

<sup>8</sup>You could choose also another browser than the default *Internet Explorer*. Use the layout *Configure PDF/WAR reading/downloading* to set the browser you wish to use (3rd. item).

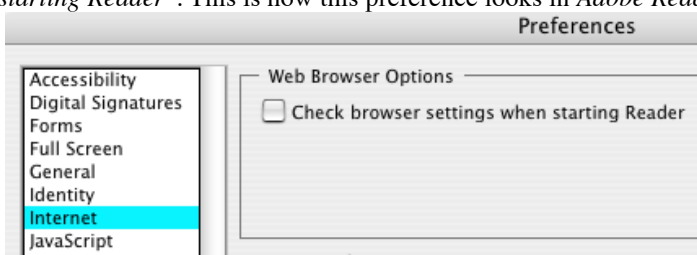
<sup>9</sup>Compared with Netscape, iCab, Camino, Mozilla.


- saving a web site as a web archive (war-file)
- download pdf-files instead of viewing them in the browser<sup>10</sup>
- ask for a destination folder for the download (*Prompt*), which gives you a chance to rename the file properly by using the main key. You find the main key in the clipboard.

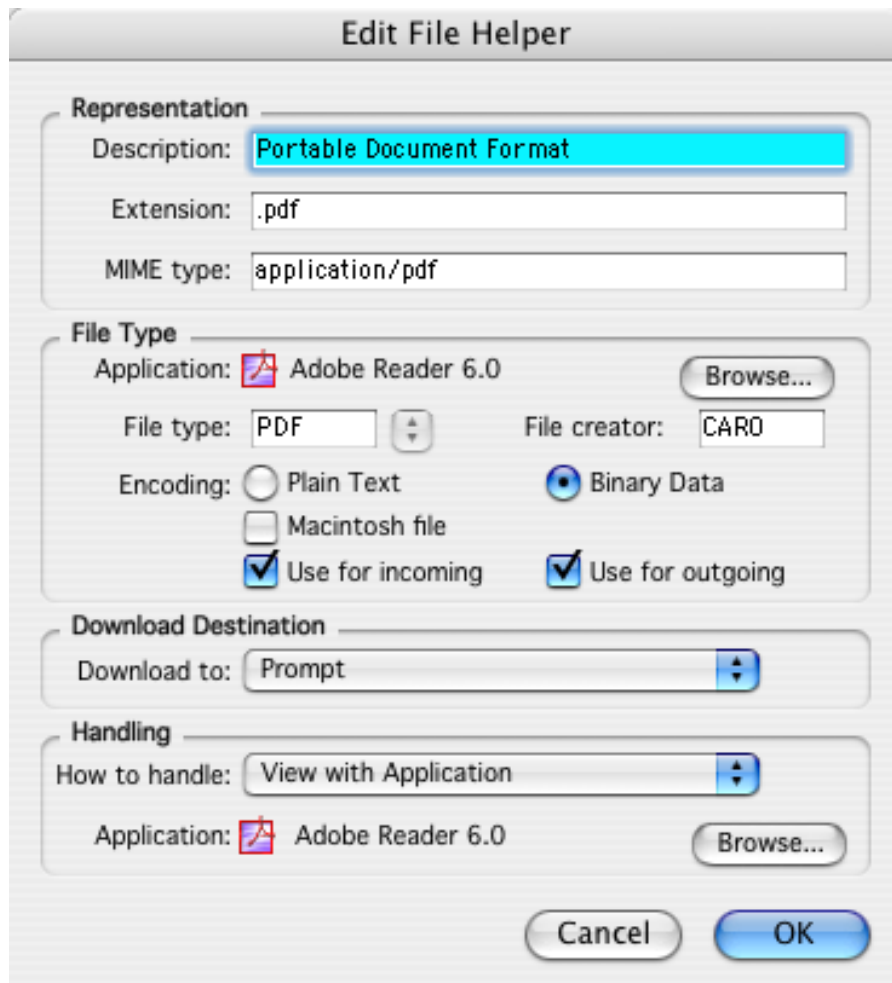
This is the configuration I recommend can set in *Internet Explorer (Preferences... > File Helpers, click on Extension (top right corner) and type pdf quickly to jump to the pdf-files). Your dialog should then look similar to this:*



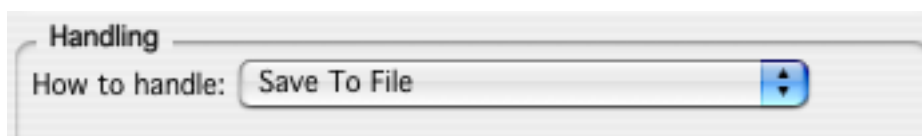
<sup>10</sup>Note, this configuration gets overwritten by *Adobe Reader* or *Acrobat* each time you launch one of these applications, unless you tell these applications to leave the browser alone. To this end you need to set only once in *Adobe Reader* and *Acrobat* the *Internet* preferences such that they do not "Check browser settings when starting Reader". This is how this preference looks in *Adobe Reader v6.x*:



Click on button  and you can edit the settings as this:



Alternatively you may also set the Handling even simpler, i.e. to:



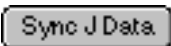
war-files need no configuration. Simply save a web site and set the nesting level till which you wish to store the site. Similarly, in Safari choose the menu command “File -> Save As...” to save a web page as a web archive.

Together with action folders, this technique offers you much convenience and efficiency during downloading of pdf files.


### 1.2.2. MAINTAINING THE *J* URLS AND «NEBIS SYSTEM NUMBER»

Normally the URL of a journal is stored only within *Journals\_at\_ETHZ*. Normally, you have a personal copy of this file besides your personal literature data base *LiteratureMY*. In order to be able to profit from other users entering journal URLs, there is now a new mechanism available. If you have access to the internet, e.g. in your office at ETHZ, there is now a new

central auxiliary data base file, called *Journals\_at\_ETHZ\_SE*, available. It allows to share URL data among all users by the synchronizing button "Sync J URLs". This button will synchronize your *Journals\_at\_ETHZ* with the central file *Journals\_at\_ETHZ\_SE*. Use this button as follows:


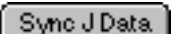
- Let's assume you wish to access the journal of a given article as described by the current record. You have entered all fields describing the reference, yet you don't see anything in the *J URL* field. However, it may well be that someone has previously entered the journal's URL you are looking for into *Journals\_at\_ETHZ\_SE*.
- Try whether the central data base contains the wanted *J URL* by clicking onto the button 
- If the *J URL* contains now an URL, you are done.

If above did not help, it means nobody has entered the *J URL* yet. Thus continue with the following steps:

- In case the field is still empty, you should now search the URL yourself. Best use the ETHZ library's web sites dedicated to this task, e.g. by button  (described below) or by Command<sup>^</sup>double-clicking into the hot URL number 3

|  |                            |  |
|--|----------------------------|--|
| <p>Hot URLs:</p> <p><a href="http://wos.cons">http://wos.cons</a> 1</p> <p><a href="http://opac.nebi">http://opac.nebi</a> 2</p> <p><a href="http://www.eth">http://www.eth</a> 3</p> <p><a href="http://www.eth">http://www.eth</a> 4</p> <p><a href="http://zbsearch">http://zbsearch.</a> 5</p> <p><a href="http://roraima">http://roraima-</a> 6</p> | which then turns into this | <p>Hot URLs:</p> <p><a href="http://wos.cons">http://wos.cons</a> 1</p> <p><a href="http://opac.nebi">http://opac.nebi</a> 2</p> <p><a href="http://www.eth">http://www.eth</a> 3</p> <p><a href="http://www.eth">bib.ethz.ch/zs_e.</a> 4</p> <p><a href="http://www.eth">html</a> 5</p> <p><a href="http://roraima">http://roraima-</a> 6</p> |
|--|----------------------------|--|




and then navigate to the web page with the wanted journal.


- Once you found the URL, please copy and paste it into the field *J URL*. Then press once more the button 
- From now on all other users will have the same *J URL* at their disposal, as soon as they press the synchronizing button 

Note, this means also that the rules as described in FISCHLIN & NEMECEK (2001) Section 3.6 «Neueinträge in den unpersönlichen Hilfsdateien» are no longer valid. Note also, in your auxiliary file *Journals\_at\_ETHZ* are now scripts available, which allow you to conveniently synchronize the URLs of several currently selected records or even all records contained in the data base. After a successful synchronization your file *Journals\_at\_ETHZ* should contain the latest URLs from both the central data base *Journals\_at\_ETHZ\_SE* as well as your local file *Journals\_at\_ETHZ*. Whatever URL you have entered and was newer than what is in the central data base, will end up there. On the other hand, some newer URL contained in the central data base will override that in your copy. Note, comparisons are done on a record by record basis, whichever record has been modified latest is the master! Be warned that any modification within the record will make the URL the master, regardless whether the modifications took place in the field *J URL* nor not! Again, similar to what is true for your records in *LiterataureMY*, it follows that it is recommended to synchronize frequently your *Journals\_at\_ETHZ*. This will minimize the risk of any loss of data.




There are new, handy scripts available, which allow you to easily update your local copy of the non-personal auxiliary file *Journals\_at\_ETHZ* (see script *Download missing records from Journals\_at\_ETHZ\_SE*). Use this script to downloading missing records or even for a complete overhaul by first deleting all present records and then to download all records from *Journals\_at\_ETHZ\_SE*.

There is a new button  <sup>11</sup>to conveniently retrieve the needed data from NEBIS. If you click it, your browser should visit in NEBIS the page that corresponds to the current record, e.g. the journal or the book. It will use different information from the record, depending on availability and type of record. In case the record is a *Journal Article*, then the button tries to use first the field *NEBISsysNo* from *Journals\_at\_ETHZ* (This field is shown in the grey area to the right of the button). In this case it will directly open the web page in NEBIS where you can order articles from the journal<sup>12</sup>. If the record is a *Journal Article* and the button leads not directly to the corresponding journal holdings in the library, try to retrieve the missing information, notably field *NEBISsysNo*, from *Journals\_at\_ETHZ\_SE* by using first the button . Otherwise, if the number is missing and you have otherwise navigated to the wanted page, please enter it into the grey area to the right of the button . Entering the data can conveniently be accomplished by simply clicking onto the gray area. Whatever is currently in the clipboard will then be pasted into the field. Then synchronize the journal data once more similarly as described above for URLs.

Depending on the information available, the button  tries to use either the title, author information, or the so-called location or call number (in German Signatur or ETH-Bibliotheks-Bestellnummer) to access the corresponding holdings in the library. The latter uses the information stored in the field TH, e.g. *P 814786*, and then tries to ask your default browser to go to that page. This way the button should make the ordering of given articles or books from the library considerably faster.<sup>13</sup>


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<sup>11</sup>TH stands for **T**echnische **H**ochschule and used to be a common abbreviation for the main ETH library.

<sup>12</sup>Alternatively you may use the button  in the auxiliary file *Journals\_at\_ETHZ* to the same end..

<sup>13</sup>In case all this fails and you never reach the wanted page, or if the wanted page seems to contain only dead links, you have to click along all the links till you get there. To make this task easier, the new button stores information according to availability and priority rules into the global clipboard (try it out to learn about it). Thus the following sequence of links in the NEBIS system becomes more convenient:

- 1) Click [Browse](#)
- 2) Click e.g. [Locations](#)
- 3) Paste the information from the clipboard, e.g. location/Signatur into the search field, e.g. Call number
- 4) Select library Location ETH-BIB (Zürich)
- 5) Click on button Search

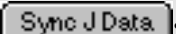
But you should understand the following: The button  jumps directly to the wanted page only if the «NEBIS System Number» is known. Otherwise there is still the need to navigate to the wanted page by some more clicks before you will reach the wanted destination. Therefore, for all those pages you need to visit frequently it is recommended to actually store somewhere the «NEBIS System Number». This is the case for journals (periodica) because of the need to visit them for ordering reprints. This is the purpose of the new field *NEBISsysNo* in the auxiliary data base file *Journals\_at\_ETHZ*.

However, for books and similar records there is no extra field to store this information. Instead you can use the field *Bibl.* (labeled TH) to this end. Attempts to store the «NEBIS System Number» in the grey area to the right of the button  result in a storage in field *Bibl.*<sup>14</sup>

**To summarize**, these are the new rules replacing what is stated on the topic managing auxiliary file *Journals\_at\_ETHZ* in the first paragraph in FISCHLIN & NEMECEK (2001) Section 3.6 «Neueinträge in den unpersönlichen Hilfsdateien»:

**Add new records for journals only in the new central data base file *Journals\_at\_ETHZ\_SE*.**

**Except for the data mentioned in the next rule, edit existing records for journals only in the new central data base file *Journals\_at\_ETHZ\_SE*.**


**Edit *J URL* information and/or the «NEBIS System Number» only directly within your personal *LiteratureMY* and once finished press button .**

## Browse Locations

Browse through an alphanumerical list of locations (call numbe

|                        |   |
|------------------------|---|
| <b>Call number:</b>    | <input type="text" value="P 819343"/>   |
| <b>Select library:</b> | <input type="text" value="Location ETH-BIB (Zürich)"/>                        |
|                        | <input type="button" value="Search"/> or <input type="button" value="Clear"/> |

6) Click on the 2nd entry in the presented list

If all this should still fail, NEBIS sometimes is really confused, use first link [Reset](#) before repeating above steps. By the way, if the library staff supports me, I will make efforts to get the new blue button  working fully so that all steps described above will no longer be necessary.

<sup>14</sup>The previously stored location number is not lost. It is stored in a hidden, repeating field. This field is visible in the layout "Maintainer's layout".



**Synchronize frequently *Journals\_at\_ETHZ* with *Journals\_at\_ETHZ\_SE*<sup>15</sup>**

or alternatively

**Download all records from *Journals\_at\_ETHZ\_SE* into your *Journals\_at\_ETHZ* after having deleted the old records there first.  
Never delete anything in *Journals\_at\_ETHZ\_SE* unless there is a definite need, e.g. removal of a faulty record.**

Remember when entering new journals into *Journals\_at\_ETHZ\_SE* to abbreviate them correctly, i.e. according to the ANSI rules. Good sources for journal abbreviations are:

FISCHLIN, 2001 Appendix H, p.40ff.

<http://cassi.cas.org/search.jsp> (also available as one of the *Hot URLs* in *LiteratureMY*)

and then see Appendix A6

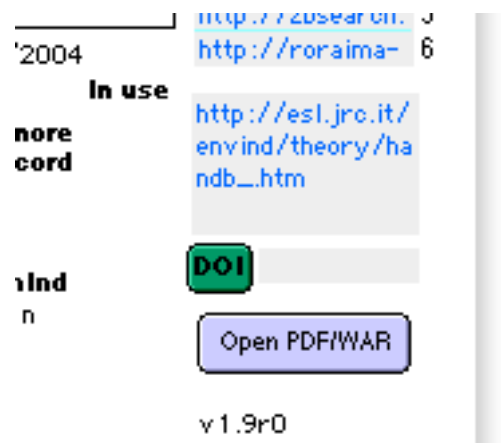
Finally, note that the field ISBN (on standard layout labelled ISB/SN) serves to store ISBN for books and ISSN numbers for journals. This is different from earlier versions of our data base and you may wish to relookup journals to enter the ISSN for records where it is missing.


---

<sup>15</sup>Use the many convenient scripts from *Journals\_at\_ETHZ* provided for this purpose.

### 1.3. DOI - Digital Object Identifier

The field *DOI*, i.e. Digital Object Identifier field, is now fully supported. A DOI is a unique identifier permanently associated with a particular journal article. It allows to jump directly to the web site where the journal article is published. You can control which browser is used<sup>16</sup>. Of course this is only possible if you have the access rights to read that journal. Use the green DOI-button to accomplish this:




The field *DOI* may contain only the DOI or may be preceded by the prefix "doi:". It may even contain an ordinary internet URL starting with "http://", e.g. "http://dx.doi.org/...". In all these cases the button  will attempt to jump directly to the location the field refers to. Note, this button is in many layouts only visible, when the field DOI actually contains some DOI information.

In case the field *DOI* is empty, the button will try to extract a DOI from the field *URL*. In case that neither the field *URL* nor the field DOI contain a DOI number, the button's algorithm will try to extract a <Go to ISI> number from field *URL* and try to link to the associated record in «*Web Of Science*» (see Section below „Linking to «*ISI Web Of Science*» via URLs containing a <Go to ISI> Link”). If the latter attempt fails, but the field URL contains a valid URL starting with "http://" an attempt will be made to go to this web site. Only if all these attempts fail an error message will be displayed.

To resolve a DOI go to:


- <http://dx.doi.org/> or [http://www.crossref.org/05researchers/58doi\\_resolver.html](http://www.crossref.org/05researchers/58doi_resolver.html)
- Our shadow home page <http://www.sysecol.ethz.ch/Internals.html> offers a resolver button (Get by DOI) which allows you to enter a DOI and jump to it.
- Such a resolver button can also be installed in your won browser. You find all you need for this here: <http://www.doi.org/tools.html>

<sup>16</sup>You can control whether the system wide default browser is used or the same browser that *LiteratureMY* uses for downloading pdf-files. Use the layout *Configure PDF/WAR reading/downloading* to set that preference. If you wish that the DOI button uses the system wide browser (default), use the value  under the 4th. item, otherwise enter value 1.

To learn more about DOIs in general visit:

- International DOI Foundation (IDF): <http://www.doi.org/index.html>
- Content Directions, Inc.: <http://www.contentdirections.com>
- Corporation for Nat'l Research Initiatives (CNRI): <http://www.cnri.reston.va.us>
- CrossRefConsortium: <http://www.crossref.org>
- DELLAVALLE *et al.*, 2003


#### 1.4. Linking to «ISI Web Of Science» via URLs containing a <Go to ISI> link

The script "Go to ISI"<sup>17</sup> or the button  does now also support the direct linking to associated «ISI Web Of Science» records, given the field URL contains some information of the following kind:

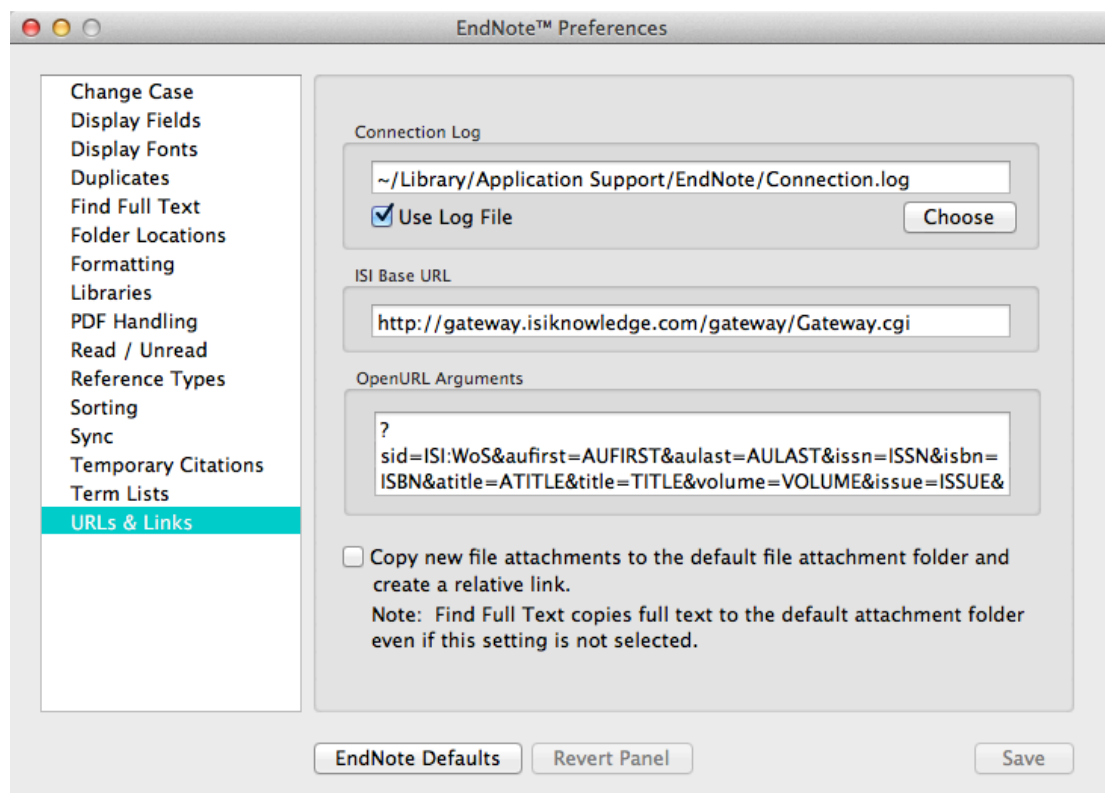
```
<Go to
ISI>://00018248
1700001
```

```
<Go to ISI>://000182481700001
```

Check in *Maintainers Layout* the content of field *GotoISIBaseURL* in *LiteratureMY*, in case you encounter problems using this feature<sup>18</sup>.

Note, if you use the button  and the field DOI contains a valid DOI, the latter is used to link to the article on the web. However, you can still force the link to «ISI Web Of Science» by directly clicking onto the field URL or choosing the menu command *Scripts > Go to ISI or URL*<sup>19</sup>.

Note, links of this kind are also supported from within *EndNote*. However, to ensure that these links do really work you need to set the field *ISI Base URL* in the *EndNote* preferences *Online* as shown below:



<sup>17</sup>May need to be first activated in order to perform this script via menu command *Scripts > Go to ISI*. Alternatively click onto the URL field containing the URL.

<sup>18</sup><http://gateway.isiknowledge.com/gateway/Gateway.cgi?GWVersion=2&SrcAuth=ResearchSoft&SrcApp=EndNote&DestLinkType=FullRecord&DestApp=WOS&KeyUT=> (as of August 2016)

<sup>19</sup>Given this helper script is currently available from your scripts menu (see Section «*New Helper Scripts*»).

Note also, you may encounter a situation where you have many URLs available, e.g. a <Go to ISI> Link as well as a PURL (Permanent/Persistent Universal/Uniform Resource Locator), a URL for the DOI of the form [http://dx.doi.org/...](http://dx.doi.org/), or any other URL (Universal/Uniform Resource Locator). The recommendation is to not waste the field URL for a DOI, since there is the field DOI available for that purpose. If the field URL contains such a DOI link, simply choose the menu command *Scripts > Maintenance > Fix URL (replace 'http:/' form by '<Go to ISI>:/'*), *prefix 'www.' by 'http:/'*) and it will extract the DOI and store it safely in the field DOI. Otherwise favor a real PURL over <Go to ISI> Link or another URL, where the latter is most likely the least stable.<sup>20</sup>

Note that reports may require special treatments, since many lack a DOI. The recommendation then is to use field URL to hold the URL to the web site where the report is described. Store in the field DOI then a deep link to the pdf. Since the latter is typically the least stable, this approach increases the probability to be able to locate the report while providing maximum convenience and flexibility for citing.

Special treatment may be required for own publications and Systems Ecology Reports, where the field URL should contain an URL to the web site of Systems Ecology, i.e. [www.sysecol.ethz.ch/publications](http://www.sysecol.ethz.ch/publications). Please choose for such publications the menu command *Scripts > Maintenance > Fix URL and DOI for SE publications* to make sure the content of fields URL as well as DOI conform to our standards.

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<sup>20</sup> Aforementioned *FileMaker* script will also detect whether there are multiple URL's stored in field URL. In such a case the script should be able to conveniently detect and extract a DOI as well as favor URL's according to this recommendation.

## 1.5. FileMaker Helper scripts


There are several handy helper scripts available, which make your work with references considerably more efficient, notably when you make them available via keyboard shortcuts (see below).

*Duplicate record* This is the script which should be used to duplicate a record. Never use *FileMaker's* menu command *Duplicate Record* or you are likely to encounter all sorts of irksome or even confusing alerts. This script helps you much in case you want to enter many records containing similar information. E.g. several articles in an edited book, several articles in the same issue of a journal, or a new edition of a book.


*Mark for electronic ownership* Inserts in the owner list an entry of the form *afEle*. This is done in a data base user specific manner. Note, however, constructs like *afPdf* are not supported. Moreover, this script clears the Comment if it appears to contain only some redundant text on the journal. The latter is often the result if you download references from *ISI Web Of Science*.


*Undo clear of comments by above mark script* If you have accidentally deleted the comments, this is an undo command for that side effect of *Mark for electronic ownership*. Note, this undo works only as long as you do it immediately afterwards.

*Paste DOI* pastes the current content of the clipboard into field *DOI*. Note, this trims and removes extra characters not belonging to the actual DOI. Thus a simple double-click onto a DOI shown in the browser followed by a Cmd-C may be sufficient to get a proper, i.e. functioning DOI.

*Go to article by DOI* is the same as clicking button  (see Section «*DOI - Digital Object Identifier*»). Having a script offers in OS X<sup>21</sup> the advantage of defining a keyboard shortcut in the Systems Preferences pane *Keyboard & Mouse* (see below).

*Go to ISI* (see Section „Linking to «*ISI Web Of Science*» via URLs containing a <*Go to ISI*> *Link*”)


*S·F·X* is the same as clicking button . If the current record is a journal article and field ISB/SN contains a valid ISSN, this script will open in the default browser a search mask to find the article using the SFX service of ETH Zurich, i.e. the Context-Sensitive Reference Linking service. Having a script offers in OS X<sup>22</sup> the advantage of defining a keyboard shortcut in the Systems Preferences pane *Keyboard & Mouse* (see below).


*Open pdf* is the same as clicking button  (see Section «Support for Reading pdf- and war-files»). In case some supplementary material is present, having the same file name as the pdf, but ends with “\_S.pdf”, then that file is also opened. This script allows to use a shortcut, for instance the same as *EndNote* is using, i.e. ⌘ ⌥ P (Command-Option-P).

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<sup>21</sup>as of Panther

<sup>22</sup>as of Panther

*Reveal pdf in Finder*<sup>23</sup> is the same as clicking button . This script opens in the Finder the folder where the linked pdf resides and selects it. In case some supplementary material is present, having the same file name as the pdf, but ends with “\_S.pdf”, then that file is also selected. This script allows to use a shortcut similar to the one used to open pdf’s, e.g.  $\text{⌘} \text{ } \text{⌥} =$  (Command-Option-=).

*Duplicate pdf(s) for e-Reading* is similar as clicking button , the only difference is that the script works for all currently selected records while the button works only for the current record. The script duplicates any linked pdf’s or other electronic documents from your main pdf repository to a folder, which an e-reader such as an *iPad* or an *iPhone* can access. Typically such a folder resides on a cloud service such as *Dropbox*<sup>24</sup> or *SugarSync*<sup>25</sup>. Use layout *Configure PDF/WAR reading/downloading* to choose that folder. If you annotate your pdf’s on the *iPad*, e.g. using App *GoodReader*<sup>26</sup>, you can synchronize pdf’s back to your Mac using this very same folder. In *BibDesk* there are companion AppleScripts available: *Extract for e-Reading* and *Sync Back from e-Reading*. *Extract for e-Reading* does more than merely duplicate pdf’s into the e-Reading folder, since it also extracts meta data and creates a bibliography file in html format, which can be read with any browser. *Sync Back from e-Reading* serves the synchronization purpose and brings back into your main pdf repository any pdf that you may have altered by annotations including support for pdf’s linked to publication records by symbolic links and/or aliases. The latter is a technique I use to store complex in collection works where each contribution, say a chapter or special issue article, needs also to be cited separately. The pdf’s of the collection are all kept within the same folder named after the collection’s cite key and symbolic links are then kept wherever they belong (cf. *BibDesk* AppleScript *Make PDF Alias*<sup>27</sup>).

*This calls for some explanations:* These scripts serve me well, since I have a huge collection of literature I do not wish to synchronize entirely all the time with my e-Reader (by the way an iPad). Therefore I prefer to have only an excerpt of the files on my e-Reader, i.e. the pdf’s I am currently reading. The huge collection of pdf’s stays mostly on my Mac in my main pdf repository. This means also my use of an e-Reader depends on no cloud service with large storage capacity. Despite having one intermediate step by using an e-Reading folder, syncing is almost as convenient as if I would synchronize my entire pdf repository with a cloud service such as *Dropbox* or *SugarSync*. Note, with this approach only the e-Reading folder is synced automatically with your portable devices using a cloud service. You have full control of what remains on your Mac’s main pdf repository and what is synced with mobile devices. However, the drawback of this approach is that you need some discipline with which files you are annotating where to avoid annotation conflicts. But the rule to run *Sync Back from e-Reading* just before annotating on the Mac suffices to avoid any such conflicts.

Alternatively you could also use tools such as *Synchronize! X Plus* or *Synchronize! Pro X* from Qdea<sup>28</sup> to keep your pdf’s in sync, e.g. by synchronizing regularly recent modified pdf’s between your main pdf repository and the e-Reader folder. However, such an approach would not support the use of symbolic links or aliases within your main pdf repository and I therefore strongly

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<sup>23</sup> May not be active by default factory settings, activate it if you wish to use it, e.g. via a shortcut.

<sup>24</sup> Available from <http://www.dropbox.com/> and Apple’s App Store

<sup>25</sup> Available from <http://www.sugarsync.com/> and Apple’s App Store

<sup>26</sup> Available from Apple’s App Store or <http://www.goodiware.com/goodreader.html>

<sup>27</sup> This AppleScript is actually not distributed together with the *BibDesk* AppleScripts, but provided with distribution of package *EndNote SE Add Ons...* However, if you use both the *EndNote Utilities* as well as our *BibDesk Support Package*, then the installer of the latter makes this AppleScript also available from within *BibDesk*.

<sup>28</sup> Available from <http://www.qdea.com/>

recommend using only above mentioned *BibDesk* AppleScripts. They sync a complex pdf repository much better than any of the commercially available software I know of.

*Paste Summary* pastes the current content of the clipboard into field *Summary*. Similar to *Paste DOI* the result is a neatly trimmed summary, even if you have made a sloppy selection including blanks at the begin and end of the actual summary text.

*Copy SECode* copies the content of field *SECode* into the clipboard, e.g. for pasting it to a filename in the Finder or other similar uses.

*Copy records as SECode list into clipboard*<sup>29</sup> copies from all records in current selection the content of field *SECode* as a comma separated list into the clipboard. See also the reverse script *Find records from SECode list in clipboard* that can be used with such a list in the clipboard to find the listed records.

*Compare SECode list in clipboard with current set* compares the current set of records with the comma separated list of *SECode*'s in the clipboard and puts possibly found differences into the clipboard. The script expects a comma separated list of *SECode*'s exactly as produced by the companion script *Copy records as SECode list into clipboard*. Its result can be directly used with script *Find records from SECode list in clipboard* to find the records that are unique to the originally found set of records.

*Find records from SECode list in clipboard*<sup>30</sup> finds the records as listed by their *SECode* in the clipboard. The script expects a comma separated list of *SECode*'s exactly as produced by the reverse script *Copy records as SECode list into clipboard* or by script *Compare SECode list in clipboard with current set*. In the latter case it searches only for those records that are unique to the *FileMaker* data base.

*Replicate keywords to all records in current set* does replicate from the current record all keywords to all other records in the current set. Before using this script make sure all records in the current set should really obtain identical keywords, since any existing keyword on any other record will be overwritten and you can't undo this action.

*Make "cf. "-list of SECodes from currently selected records* does creates a list of all *SECodes*, i.e. the so-called "cf. ..." list, from all currently selected records in the field *Comments* of all currently selected records. Ex.: If two records are currently selected that have these *SECode* values: **Be246** and **Cr68**, the result of this command is that following string

cf. Be246, Cr68

is inserted as an additional line in the field *Comments* of both records. The advantage of this is that you can easily search a set of records thus related using the next helper script.

*Find records from "cf. ..." list of SECodes in field Comments* finds all records that are related by a common "cf. ..." list in the *Comments* field as created by the previous helper script. If your field *Comments* starts with an entry such as "^Fi103", the text after "^" is interpreted as the *SECode* of the record of a work in which the current reference has been cited and this script will find that related record.

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<sup>29</sup> The companion AppleScript with the same functionality in *BibDesk* is: *Selected To Clipboard (Cite Key List)*

<sup>30</sup> The companion AppleScript with the same functionality in *BibDesk* is: *Select From Clipboard (Cite Key List)*



*Add this record to current find* does add to the current find the *SECode* from the current record for subsequent finding. This script is particularly handy while using a shortcut such as Ctrl-← (Ctrl-<cursor left>), since the shortcuts Ctrl-↓ (Ctrl-<cursor down>) and Ctrl-↑ (Ctrl-<cursor up>) are standard FileMaker shortcuts to move to the previous or next record.

*Perform current find* executes the current find. This script is particularly handy while using a shortcut such as Ctrl-→ (Ctrl-<cursor right>) (see also above *Add this record to current find*).

*Show these publications in BibDesk* searches and selects in *BibDesk*'s current top document all publication(s) that correspond to the currently selected records. Matching is done by matching cite keys with the *SECode*'s from all currently selected records. This script is particularly handy while using a shortcut such as Ctrl-H and has a counterpart script in *BibDesk*, i.e. AppleScript *Show In LiteratureMY*, for which it is also recommended to use the shortcut Ctrl-H.


Note the buttons




operate only on a single, i.e. the currently shown record. Otherwise the right button "Show same ..." "in BibDesk" does the same as this script.

*Replicate current 'InUseFor' value to all records in current set* does replicate the currently selected entry in field *InUseFor* to all other records in the currently selected set. The entry is inserted at the top after having shifted all other possibly present entries one position down. Be warned, this means of course you may lose in some records some entries, i.e. the last one, if all seven repetitions of field *InUseFor* hold an entry before the new is added.

*Free first entry in field 'InUseFor' in current set* shifts all entries in field *InUseFor* by one repetition down to free some more space at the top of the list for a new entry. Be aware that this helper script does operate on all currently selected records. If any of your records holds already a value in all 7 repetitions, the last entry will be lost for those records.

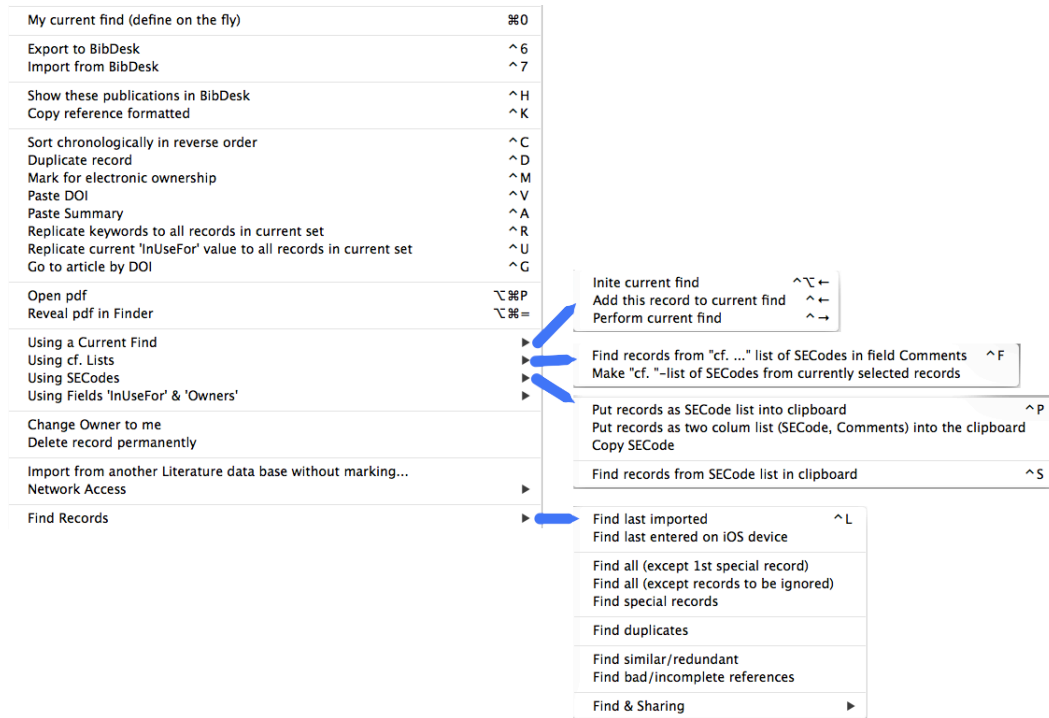
*Cleanup field 'InUseFor' in current set* discards duplicate entries and gaps in field *InUseFor*. This helper script does operate on all currently selected records. Note, to cleanup the field *InUseFor* for an individual record, switch to *Maintainers Layout* and click button . **In use**

*Cleanup field 'Owners' in current set* discards duplicate entries and gaps in field *Owners*. This helper script does operate on all currently selected records. Note, to cleanup the field *Owners* for an individual record, switch to *Maintainers Layout* and click button  below the bottom of the column of reprint owners.

*Delete record permanently* deletes the currently selected record permanently by also deleting all corresponding records in the central data base. Use this script only if you are on-line and the central data base *LiteratureSE* is available! This is the recommended method of deleting records from your data base. Refrain from simply using *FileMaker*'s standard menu command "Records -> Delete Record..."; use this script instead to avoid inconsistencies in your data base.

Note, some of these helper scripts may not be active by default or may be grouped within a submenu. You may need to access first the submenu to choose those commands or even activate them first.<sup>31</sup> Others may not be useful to you and you may prefer to deactivate them. Thus, customize them to your liking and working style.

Many of these helper scripts become really useful if they can be triggered with a keyboard shortcut. I suggest e.g. to use the following shortcuts:

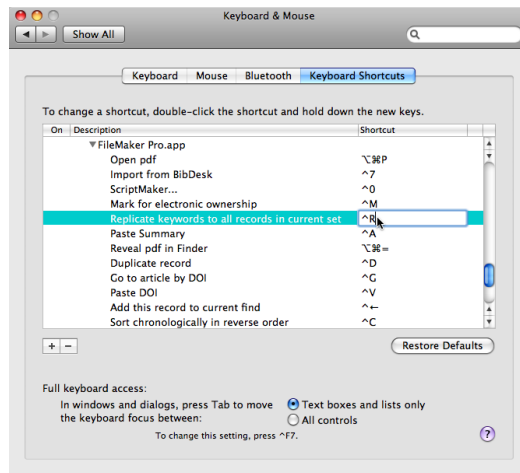


How to set these shortcuts? As of Mac OS X Panther (v 10.3.x) the OS supports the customization of any native application<sup>32</sup>. Thus, thanks to OS X you can go beyond the restrictions of *FileMaker*, which supports by itself shortcuts only for the first ten scripts (⌘ 1 .. ⌘ 0).

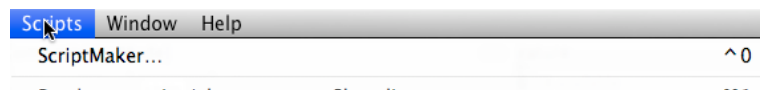
<sup>31</sup> Choose menu command *Scripts > ScriptMaker...* and check or uncheck the option "Include in Menu" for the scripts you wish to hide or access from the *Scripts* menu. Besides, unless you know exactly what you do, refrain from activating scripts ending with “ (internal)”, since they should never be called directly or you risk failure.

<sup>32</sup> Albeit *FileMaker Pro 6.0.4* is not a Cocoa application, it is a native Carbon application and can still be customized. Mac OS X 10.3.9 (Panther) required to customize all commands in one go and was limited in the possibility to edit the shortcuts. Under Mac OS X 10.5.8 (Leopard) and later the customization is fully functional and works for *FileMaker Pro 6.0.4* and all later versions as conveniently as for any other application.

Use the Systems Preferences pane *Keyboard & Mouse* to set your keyboard shortcuts. This should look similar to the following:



Hint: To avoid typos, copy and paste the script names from *FileMaker* to the *System Preference Pane* and switch back and forth between the two applications. To this end open first *FileMaker*'s dialog window by choosing menu command "Script -> ScriptMaker...". If you use that menu command often, this is also the moment to assign to it the shortcut Ctrl-0.



In fact I find it useful to customize even further scripts, e.g. the one sorting in reverse chronological order brings you the most recent records to the top of your current selection. Here a list of all the shortcuts I work with daily and which facilitate in my experience the work considerably:

```

^0      ScriptMaker...
^C      Sort chronologically in reverse order
^6      Export to BibDesk
^7      Import from BibDesk
^D      Duplicate record
^M      Mark for electronic ownership
^V      Paste DOI
^G      Go to article by DOI
⌘P     Open pdf
⌘=     Reveal pdf in Finder
^A      Paste Summary
^K      Copy reference formatted
^+      Copy Compare SECode list in clipboard with current set into clipboard
^-      Compare SECode list in clipboard with current set
^S      Find records from SECode list in clipboard
^R      Replicate keywords to all records in current set
⌘K     Save original keywords in field 'Comments'
^U      Replicate current 'InUseFor' value to all records in current set
^F      Find records from "cf. ..." list of SECodes in field Comments
^←      Add this record to current find
^→      Perform current find
^H      Show these publications in BibDesk
^L      Find last imported

FindInconsistencies:
^CmdR   Refind the inconsistent
^CmdM   Show related record in LiteratureMY
^CmdP   Open folder and reveal PDF in Finder
^CmdH   Show current record in BibDesk
    
```

## 1.6. Exporting to *EndNote*

The export to *EndNote* from your personal *FileMaker* data base was slightly modified: By default records are no longer marked as having been exported. As a consequence you can freely export records in large quantities to *EndNote* without having to upload/merge all involved records later to the central data base *LiteratureSE*. Previously any export to *EndNote* modified the involved records by marking them with the export date, which consequently lead to this behavior. The latter is quite cumbersome in case of a large data base. Should you prefer the old scripts, they are still available, but by default not shown in the menu "Scripts". If you wish to activate any of them, choose the menu command "Scripts -> ScriptMaker..." and check the script you wish to see in the menu "Scripts".

There are also several scripts available, which export records to *EndNote* (see Appendix A2 «Transferring records (Overviews)»). Under Mac OSX it is now also possible to trigger the entire transfer into *EndNote* or at least the conversion done by the *EndNote* menu in *AlphaX*. These features assume you have all necessary software pieces installed properly (*EndNote menu* in *AlphaX*, AppleScript, *EndNote*). The older scripts are still available, but they are not shown by default in the menu "Scripts".

The complex transfer scripts work only successfully if you have a proper installation. Make sure to follow **religiously** the installation instructions given in file *READ ME EndNote SE Add Ons.rtf* as released with the latest package *EndNote SE Add Ons*.

### 1.7. Importing from *EndNote*

As of version 2.9r0 and later of *LiteratureMY* you may now directly import records from an *EndNote* bibliography to your personal *FileMaker* data base under OS X. From within *LiteratureMY* simply choose the new menu command "Scripts -> Import from EndNote (do entire transfer and quietly import file 'refs.out')". Any currently selected records in the topmost *EndNote* bibliography are transferred. In case there are no records selected, all records shown will be transferred. This new feature replaces the previously available launching of the AppleScript application 'EN2FM.app' (see also Appendix A2 «Transferring records (Overview)»). This new feature will only work flawlessly if you have all necessary software pieces properly installed (*EndNote menu* in *AlphaX*, AppleScript, *EndNote*). The older script "Scripts -> Import from EndNote (quietly from file 'refs.out')" is still available, but is no longer shown by default in the menu "Scripts".

Such a transfer is complex and involves many steps running invisibly in the background, and works only successfully if you have a proper installation. Make sure to follow **religiously** the installation instructions given in file *READ ME EndNote SE Add Ons.rtf* as released with the latest package *EndNote SE Add Ons*.

## 1.8. Using *BibTEX*

*LiteratureMY* can easily generate traditional *BibTEX* files to use them in whichever manner you like. *BibTEX* files are ASCII text files and are typically required to manage references while writing documents with *TEX* or *LaTEX*. However, to achieve full collaboration between the *LiteratureMY* system and *BibTEX* files, it is recommended to use the great open source application *BibDesk*<sup>33</sup>. *BibDesk* allows you to conveniently manage *BibTEX* files in many ways. *BibDesk* is very powerful and offers many more features as partly described below (Section «Using *BibDesk*»). This section is dedicated to the traditional use of *BibTEX* files, but is also of interest if you use *BibDesk*, since *BibDesk* stores its information in a manner that is fully compatible to the *BibTEX* standard. Details on this format and how it relates to the *LiteratureMY* system are provided in this, the actual use of *BibDesk* in the next section.

Note, the export of the traditional *BibTEX* files is still fully supported under Classic. However, since *BibDesk* is only available for OS X, the *LiteratureMY* system makes use of OS X in many respects, notably when cooperating with *BibDesk*. While exporting of *BibTEX* files from *LiteratureMY* is supported for all operating systems, transferring records back to *LiteratureMY* or other helpful features offered by *LiteratureMY*, such as auto-filing (see Section «Using *BibDesk*») etc. are no longer available under Classic.

### 1.8.1. EXPORTING TO *BIBTEX* FILES

First a direct, simple and efficient export of references to traditional *BibTEX* files is provided by *LiteratureMY*. You can export references to the *BibTEX* format by using in the *FileMaker* data base *LiteratureMY* the script «Export to BibTEX...»<sup>34</sup>: This exports all currently selected references to a so-called *BibTEX* file, i.e. a file with the fixed name *refs.bib* (note extension ".bib" to be used for all *BibTEX* files)<sup>35</sup> residing within your Literature work folder<sup>†</sup>. In case you wish to add some references to an already existing *BibTEX* file, use application *BibDesk* (see also next Section on «Using *BibDesk*») or merge them manually, e.g. by using the editor *AlphaX*<sup>36</sup>. To edit the content of such a file in detail use either *BibDesk* (described below) or the editor *AlphaX*.

<sup>33</sup> A great open source application available from <http://bibdesk.sourceforge.net/>

<sup>34</sup> This script is by default not shown in the menu. Instead «Scripts -> Export to BibDesk» is available in the menu by default.

<sup>35</sup>For this to succeed when using *LiteratureMY* while having booted into OS Classic, the presence of utility *FMtoBibTeX* is required in the same directory where *LiteratureMY* resides. Otherwise the export script will merely create a file *refs-temp.bin*. The latter needs to be formatted properly in order to become a real *BibTEX* file. Note also, *BibDesk* can't open successfully the *refs-temp.bib* file. Always run first *FMtoBibTeX* to create *refs.bib* or then replace manually all characters 13C for characters 15C.

<sup>†</sup> The location of this folder can be freely chosen according to your liking. However, to allow these scripts to know where this folder resides, you need to have a little text file name 'LITMYPath.txt' in the *bin* directory in your home directory (~bin/LITMYPath.txt) that exports the shell variable LITMY pointing to the location of your directory. Such a file is provided (distributed within a disk image with name containing *EndNote SE Add Ons...*) and automatically installed if you install the recommended *EndNote utilities*. However, you may need to update its content according to your actual system setup.

<sup>36</sup> The *Tcl* extendable editor for power users: <http://alphatcl.sourceforge.net/wiki/pmwiki.php/Software/AlphaX>

The following relationships hold between reference types (*Ref\_Type*) and entry types in addition to what is stated in FISCHLIN & NEMECEK (2001, p. 26-29) for the most commonly used reference types:

| LiteratureMY v>=1.8r5 | BibTEX <sup>37</sup> | EndNote 7 (SE) <sup>38</sup>       | EndNote 7 (default <sup>39</sup> )    |
|-----------------------|----------------------|------------------------------------|---------------------------------------|
| Journal Article       | <b>article</b>       | Journal Article (1 <sup>40</sup> ) | Journal Article (1)                   |
| Book                  | <b>book</b>          | Book (2)                           | Book (2)                              |
| In Edited Book        | <b>incollection</b>  | In Edited Book                     | <i>Magazine Article</i> <sup>41</sup> |

Note, that ambiguities arise, since a perfect mapping of the reference types among the various systems is not possible. A complete list of all reference types available as of this writing is given in Appendix A8 «Correspondence between *EndNote*, *FileMaker*, and *BibDesk/BibTEX* reference types».

The meaning of the fields is described in KOPKA & DALY (2003, p. 232-233). Some fields, notably extensions of the *BibTEX* standard<sup>42</sup> by *BibDesk* are also listed here. The following correspondence between fields will be observed by the transfer scripts:

| LiteratureMY v>=1.8r5 | <i>BibTEX</i> <sup>43</sup>                  | EndNote <sup>44</sup> (Generic <sup>45</sup> ) |
|-----------------------|--|--|
| Ref_Type              | <b>entry type</b>                            | Reference type                                 |
| SysEcolCode           | <b>cite key</b> <sup>46</sup> (citation key) | Label <sup>47</sup>                            |
| Authors               | <b>author</b>                                | Author   |

<sup>37</sup>In *BibTEX* reference types are called entry types

<sup>38</sup>Customization of reference types needed for proper transfer from *FileMaker* data base *LiteratureMY* to *Endnote* and vice versa. Moreover, you need the editor *Alpha's* menu package *EndNote* to accomplish the transfer. This means in practice: With *EndNote* versions older than *EndNote XI* you need to copy the *EndNote* preferences to your Preference folder exactly as distributed with our personal literature data base software [afp://se-server.ethz.ch/SE\\_Intern/Literature/](http://se-server.ethz.ch/SE_Intern/Literature/) (distributed within a disk image with name containing *EndNote SE Add Ons...*). As of *EndNote XI* you no longer need to customize the reference types in such a cumbersome way: You can conveniently import the needed reference types. Secondly install in the *AlphaX* editor the menu package *EndNote* by double-clicking the installer file. The latter comes again with this same software distribution (on disk image *EndNote SE Add Ons...*). For details see the installation instructions also available within this distribution and in this documentation Appendix A2 «Transferring records (Overviews)».

<sup>39</sup>The listed reference types are those of *EndNote's* factory settings, i.e. the so-called *EndNote Defaults*.

<sup>40</sup>The numbers correspond to the sequence in which the reference types are listed in *EndNote*.

<sup>41</sup> In later *EndNote* versions the reference type *Unused 1* is customized and used for type *In Edited Book*.

<sup>42</sup> Described nicely at <http://nwalsh.com/tex/texhelp/BibTeX.html>

<sup>43</sup>"Official" *BibTEX* fields are listed in bold

<sup>44</sup> Does apply to *EndNote* v7 and later versions. Upward compatibility given, since later *EndNote* versions have mostly just added fields

<sup>45</sup> Only the so-called generic field names are listed here. Since *EndNote* field names can be changed/customized, the actual names differ from the ones listed here (see also Appendix A9 «Correspondence between *EndNote*, *FileMaker*, and *BibDesk/BibTEX* fields»).

<sup>46</sup> Original *BibTEX* name of this field is merely *key*, while *BibDesk* names it well *cite key*

<sup>47</sup>Listed here out of sequence because of its prominent role as main key of the data base (only true for *LiteratureMY* and *BibTEX*, but unfortunately not so for *EndNote*, which knows no true main key. The reference number is not associated with a particular record and may too easily change! The big drawback of *EndNote*.)

|                       |   |                            |
|-----------------------|---|----------------------------|
| Year                  | <b>year</b>   | Year                       |
| Title                 | <b>title</b>  | Title                      |
| Editors               | <b>editor</b>   | Secondary Author           |
| JOrPubl <sup>48</sup> | <b>journal, booktitle</b>   | Secondary Title            |
| City                  | <b>address</b>  | Place Published            |
| Publisher             | <b>publisher, organization, institution, school, howpublished</b> <sup>49</sup> | Publisher                  |
| Vol                   | <b>volume</b>   | Volume                     |
| Microfiche            | <i>custom5</i> *  | Number of Volumes          |
| No.                   | <b>number</b>   | Number                     |
| pp                    | <b>pages</b>  | Pages                      |
| SeriesEditor          | <i>custom5</i> *  | Tertiary Author            |
| SeriesTitle           | <b>series</b>   | Tertiary Title             |
| Edition               | <b>edition</b>  | Edition                    |
| PlaceDate             | <b>month</b> <sup>50</sup>  | Date                       |
| TypeOfWork            | <b>type</b>   | Type of Work <sup>51</sup> |
| Owners                | <i>custom5</i> *  | Reviewed Item              |
| Bibl. <sup>B</sup>    | <i>custom5</i> *  | Call Number                |

<sup>48</sup> The field *Journal* (not *FullJournal*, which is basically omitted from exports, since it can be reconstructed from field *JOrPubl* anytime) is written to field *journal* if the record is a *Journal Article*, *Newspaper Article* (or magazine article), or *Edited Articles*, to field *booktitle* in all other cases (*InBook*, *In Edited Book*, *In Proceedings*).

<sup>49</sup> The field *Publisher* is written to field *school* if the record is a *Thesis*, to field *institution* if the record is a *Report* or *Edited Report*, to field *organization* if it is a *In Proceedings*, *Proceedings*, or *Tech Report*, to field *howpublished* if the record is a *booklet* or *misc*, to field *publisher* in all other cases.

\* *BibTeX* tolerates any non-standard field in its data base and *BibDesk* supports even their editing! However, the XML export to *EndNote* has limitations and therefore using non-standard fields within *BibDesk* can result in data loss when attempting to export data out of *BibDesk*. Thus exporting from *LiteratureMY* to *BibTeX* supports all standard *BibTeX* fields and then uses a minimum number of additional special fields to store the extra information. Among these is note-worthy field *custom5* reserved for internal use. *LiteratureMY* offers no such field, yet during exporting, several fields from *LiteratureMY* are packed at once into the *BibDesk* field *custom5* to avoid any data loss when transferring records back and forth between *BibDesk* and *LiteratureMY*.

<sup>50</sup> The *LiteratureMY* field *PlaceDate* is stored in *BibTeX* field *month* for reference types *Proceedings*, *In Proceedings*, or *Edited Articles*, the latter being e.g. a special issue serving as proceedings of a conference. *PlaceDate* contains two types of data: First the place or location where the conference took place, secondly the date of the conference, inbetween a semicolon as delimiter. Ex.: "Athens, Greece; January 2-4, 2015". Patashnik (1988, p.7) recommends to use the *BibTeX* field *address* for storing the conference place. However, we always use *BibTeX* field *address* to hold only the publisher's address. You could use the optional *BibTeX* field *location* for that purpose, but then you risk to lose that information when transferring records between *BibTeX* and the *FileMaker LiteratureMY* data base. Note, *BibTeX* field *month* is recognized as optional for aforementioned reference types. Thus we recommend to use it always for storing the conference date.

<sup>51</sup> In case of a *Journal Article*, *Newspaper Article*, or *Edited Articles* the field *TypeOfWork* may contain some section information, e.g. "Editorial" or "Letters" for the corresponding sections in the Science magazine.



|                    |                                       |                |
|--------------------|---------------------------------------|----------------|
| ISBN               | isbn                                  | ISBN/ISSN      |
| Users              | custom5 *                             | Custom 1       |
| Ref_Status         | custom5 *<br>(Custom 2) <sup>52</sup> | Custom 2       |
| Entry_Date         | custom5 *                             | Custom 3       |
| Modified           | custom5 *                             | Custom 4       |
| - *                | custom5 *                             | Custom 5       |
| Custom_6           | custom5 *                             | Custom 6       |
| Custom_7           | custom5 *                             | Custom 7       |
| DOI <sup>53</sup>  | doi <sup>54</sup>                     | DOI            |
| Bibl. <sup>B</sup> | custom5 *                             | Call Number    |
| Keywords           | <b>keywords</b>                       | Keywords       |
| Summary            | <b>abstract</b>                       | Abstract       |
| Project            | encoded within <b>annote</b> ‡        | Notes          |
| InUseFor           | encoded within <b>annote</b> ‡        | Notes          |
| StoragePlace       | encoded within <b>annote</b> ‡        | Notes          |
| InCrdIndex         | encoded within <b>annote</b> ‡        | Notes          |
| Comments           | <b>annote</b> <sup>55</sup>           | Research Notes |

<sup>B</sup> Since the *FileMaker* data base *LiteratureMY* was designed before *EndNote* offered the field *Call Number*, the field *Alternate Title* was used to store that information. As of *EndNote 7* the field *Bibl.* is stored in field *Call Number*.

<sup>52</sup> The field *Custom 2* (custom2) is reserved for internal use only. In *BibDesk* custom2 stores the fact that a record was newly acquired in *BibDesk* and that its *cite key* was not generated in *LiteratureMY* but in *BibDesk* (holds marker 'fromBibDesk'). Once the record has been transferred to its final storage in *LiteratureMY*, this field *custom2* is emptied and the marker is transferred into *LiteratureMY* field *InCrdIndex* for permanent storage (using phrase 'BibDeskEntered'). Instead in *LiteratureMY* the field *Ref\_Status* holds now the ordinary status of a record, the status as preserved in *BibDesk* field *custom5*. As a consequence you should refrain from editing field *Custom 5* (*custom5*), neither in *BibDesk*, nor in *EndNote*, to avoid the risk of disturbing the automatic processing and full preservation of all data during any record transfers.

<sup>53</sup> Can also hold an ordinary URL and serves within *FileMaker* data base *LiteratureMY* to store a 2<sup>nd</sup> URL if no DOI is available for this record, which is often the case for older publications, which then may have associated a so-called stable URL, as e.g. provided by JSTOR.

<sup>54</sup> *BibDesk* gives this field also special treatment and considers it similar to a URL

‡ Since the *FileMaker* data base *LiteratureMY* was designed before *EndNote* offered a sufficient number of fields, this field together with others needed to be summarized in a single *EndNote* field when transferring from *FileMaker* to *EndNote*. First we could use only *EndNote* field *Notes* for that purpose and we kept this technique for backward compatibility reasons. On the other hand, *BibTeX* uses field *note* for specific purposes, i.e. its content typically ends up in the *BibTeX* generated list of references and *BibTeX* field *annote* corresponds actually best with *FileMaker* field *Comments*. Therefore the contents of the *FileMaker* fields *Project*, *InUseFor*, *storagePlace*, and *InCrdIndex* are stored in *BibTeX* field *annote* after reserved keywords "ProjectUse: ", "InUseFor: ", "StoragePlace: ", "InCardIndex: " (or "AlsoOnIndexCard" not followed by any data) at the very end of *BibTeX* field *annote*.

<sup>55</sup> Do not confound the field *note* with field *annote*. The content of field *note* is by default always added to a reference in the generated list of references. This is not the case for field *annote*, which is reserved for special lists, i.e. annotated lists of references. However, *BibDesk* respects in field *annote* line breaks, not so in the field *note*. The latter's content is always filled and wrapped, and you therefore would lose any end-of-line information

|   |   |                                |
|---|---|--------------------------------|
| URL   | url <sup>56</sup>                           | URL <sup>57</sup>              |
| <i>Comments</i> <sup>58</sup>                                       | <b>chapter</b>                              | Chapter                        |
| †   | <b>key, crossref</b> <sup>59</sup>          | †                              |
| Owner contains an <i>Ele</i> entry, e.g. <i>afEle</i>               | Local-Url <sup>60</sup>                     | File Attachments <sup>61</sup> |
| Owner contains an <i>Ele</i> entry, e.g. <i>afEle</i> <sup>62</sup> | Bdsk-File-1, Bdsk-File-2 etc. <sup>63</sup> | File Attachments               |
| URL, DOI <sup>64</sup>  | Bdsk-Url-1, Bdsk-Url-2 etc. <sup>65</sup>   | URL <sup>66</sup>              |

### 1.8.2. IMPORTING FROM *BIBTEX* FILES

References stored in the *BibTEX* format, can also be transferred back to your *FileMaker* data base *LiteratureMY*. Albeit, in contrast to the export technique described above no direct import is possible. You need *EndNote* as an intermediary step.

An import is most conveniently accomplished by choosing in *LiteratureMY* the *FileMaker* script «Import from BibDesk» (Ctrl-7). All in *BibDesk* currently selected or shown records

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during transfers. Fortunately, field *annotate* does respect line breaks and for all these reasons is therefore better suited to hold *MyLiterature*'s field *Comments*. If you enter data in both fields, i.e. *BibTeX*'s field *note* (*EndNote*'s *Notes*) as well as *BibTeX*'s *annotate* (*EndNote*'s *Research Notes*), all data will be merged and end up in *MyLiterature*'s field *Comments*.

<sup>56</sup> Within *BibDesk* this field can be of a rather ephemeral nature and is normally also automatically converted into so-called Remote URLs, fields with a special treatment and which are named *Bdsk-Url-1*, *Bdsk-Url-2* etc.

<sup>57</sup> Can hold multiple items

<sup>58</sup> In *LiteratureMY* field *Comments* typically stores such information. However, that field is exported to *BibTEX* field *annotate*, since field *Comments* holds typically more information than just a chapter number. Thus, you need to extract chapter information manually, once the record is in *BibDesk*. Alternatively you can use a unique keyword to prefix the actual chapter information, e.g. CHAPTER. That can then be used – e.g. by an AppleScript – to extract and transfer the wanted information into *BibTEX* field *chapter* or *note* for systematic use in the list of references as generated by *BibTEX*.

† not supported

<sup>59</sup> *BibTEX* field *key* must not be confounded with field *cite key*; the former can be used for alphabetical sorting, while the latter is used to cite. The *BibTEX* fields *key* and *crossref* should not be used. In particular *crossref* forecloses any conservative importing and exporting among the various data base systems used here.

<sup>60</sup> This field may hold a so-called file URL, e.g. “file://localhost/HD/Data%20Bases/pdf-collection/...”. Within *BibDesk* this field is of a rather ephemeral nature and is normally immediately converted into so-called Local Files, fields with a special treatment and which are named *Bdsk-File-1*, *Bdsk-File-2* etc.

<sup>61</sup> *EndNote* can store several file attachments in this field

<sup>62</sup> Supplementary material is normally stored under the pdf name <SECode>\_S.pdf. Thus it is possible to have a second pdf linked to a record.

<sup>63</sup> The *BibDesk* fields used to store links to pdf and other local, so called linked files. The data is not human readable, but can be accessed, e.g. through AppleScript, such, that it becomes readable, i.e. in the form of traditional Unix path. Enter a file in such a traditional form only as a local file URL via the field *Local-Url*.

<sup>64</sup> A maximum of 2 URLs can be stored in *LiteratureMY* (fields *URL*, *DOI*)

<sup>65</sup> The *BibDesk* fields used to hold any number of URLs, listed as so called Remote URLs and which are also shown in the right side pane as active thumbnails.

<sup>66</sup> *EndNote* can store several URLs in this field

are then transferred via *EndNote*. Alternatively you can choose the *BibDesk* menu command "File -> Export -> EndNote XML..." The resulting file with extension "...xml" can then be imported into *EndNote* using the *Import Option* named *EndNote Generated XML*<sup>67</sup>. Once in *EndNote* the usual rules apply and you can use in *LiteratureMY* the *FileMaker* script «Import from EndNote (do entire transfer and quietly import file 'refs.out')» (Cmd-7).

Note, all information hold by records in *LiteratureMY* is fully preserved in a transfer *LiteratureMY* -> *BibDesk* -> (*EndNote*) -> *LiteratureMY*. Some of those data are stored in a compact form in the non-standard *BibTEX* field *custom5*, which is also honored by the XML export to *EndNote* and which is unpacked by the *AlphaX* menu package "EndNote" to restore all as *LiteratureMY* needs (see also Appendix A2 «Transferring records (Overview)»). This means also while in *BibDesk* you should leave field *custom5* untouched to ensure full preservation of all data when possibly transferring records back to *LiteratureMY*.

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<sup>67</sup> The use of the utilities *Bibutils* (See Section «Conversion Utilities») is not recommended in this context, since they do not preserve sufficient information in such transfers.

## 1.9. Using *BibDesk*

*BibDesk*<sup>68</sup> is a great application that allows you not only to manage *BibTEX* files, but also to acquire records from ISI Web of Science and many other data bases such as NEBIS provided by the main library at ETH Zurich<sup>69</sup>. It is even possible to automatically assign a final main key (*SECode*, *cite key*) while acquiring new records within *BibDesk*. This is important, since *BibDesk* offers also to immediately link pdf's to such newly acquired records and to store pdf's conveniently in your pdf folder. All very powerful and very convenient in contrast to all other techniques offered by our system. Once acquired, the new records can be safely transferred to *LiteratureMY* for final storage.

However, there are caveats associated with this technique, notably there is the risk of main key conflicts if both techniques of acquiring records should be used in parallel or in any other uncoordinated manner. However, if you adhere to a few rules such risks can be avoided and a smooth working flow can be achieved. These rules apply (details provided below):

- 1) Customize *BibDesk* once to set its preferences to apply the same rules as employed by your *LiteratureMY* system. Following preferences need to be modified from the factory settings:
  - Automatic generation of *Cite Key* with a special hook script *Did\_cite\_key*
  - Automatic conversion of local files and automatic filing by *BibDesk*
- 2) Install some utilities, notably AppleScripts such as *DumpCodesMY*, that allow to conveniently coordinate your work between *BibDesk* and *LiteratureMY*

Once properly setup you need to stick to following rules of usage:

- 1) Either acquire new records in *BibDesk* or *LiteratureMY*, but never in both at the same time.
- 2) Always before you start using *BibDesk* to acquire records run utility *DumpCodesMY*. The latest main keys as assigned by *LiteratureMY* will be made available to *BibDesk*<sup>70</sup>.
- 3) Always before you resume using *LiteratureMY* to acquire new records transfer all the records you have acquired in *BibDesk* back to *LiteratureMY*. This will ensure *CodesMY* is properly updated and *LiteratureMY* learns about the main keys you assigned in *BibDesk*.

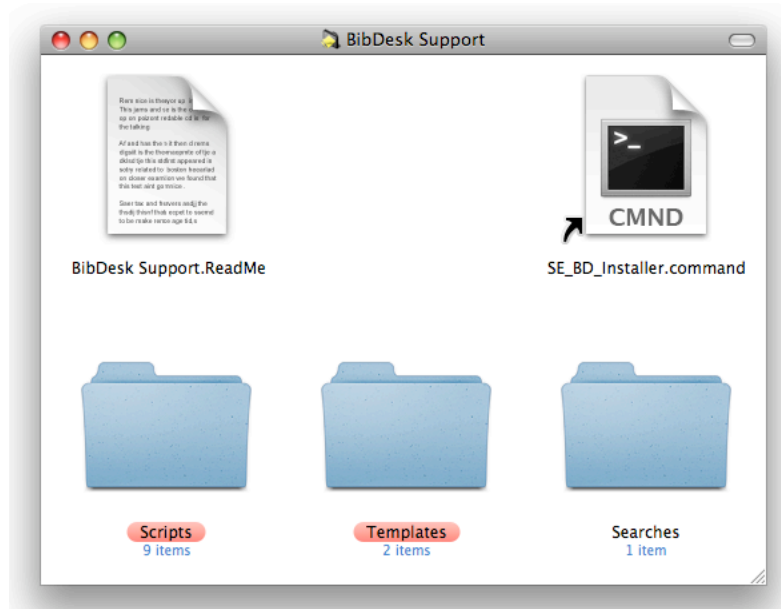
<sup>68</sup> A great open source application available from <http://bibdesk.sourceforge.net/>

<sup>69</sup> Requires the installation of a little *BibDesk* Search file (extension '.bdssearch'). Many data base services offer now such search files. One for NEBIS, named 'NEBIS-zoom.bdssearch', is also distributed with the package *EndNote SE Add Ons...* (disk image *EndNote SE Add Ons....dgm*). You need to install it only once in *BibDesk* (menu *Searches*) and should then be able to conveniently search in NEBIS from within *BibDesk*.

<sup>70</sup> *BibDesk* uses actually a small text file *CodesBibDeskAF* storing similar information as *CodesMY* does. Make sure you well preserve this file. To coordinate the main key assignment, an additional auxiliary file will be generated by AppleScript *DumpCodesMY* named 'DumpOfCodesAF'. *BibDesk* will make sure that correct keys are assigned if *DumpOfCodesAF*'s content is uptodate and properly reflects the content of *CodesMY*.

### 1.9.1 CUSTOMIZING *BIBDESK*

You need several files extending the default capabilities of *BibDesk* and to set *BibDesk*'s preferences accordingly. All necessary scripts and template files are distributed within a folder *BibDesk Support*<sup>71</sup> that comes with the ordinary distribution of the *LiteratureMY* system (FISCHLIN & NEMECEK, 2001). Copy the folder *BibDesk Support*



to your system to a permanent location. This folder also contains an installation script *SE\_BD\_Installer.command*<sup>72</sup> that you need to run<sup>73</sup> for preparing the customization of *BibDesk*. It will install symbolic links as needed and make the following one time customization<sup>74</sup> of *BibDesk* easy. For further installation details and hints consult also the provided ReadMe file.

The following describes the needed one time customization of *BibDesk* step by step<sup>75</sup>:

Very crucial is to always generate only proper cite keys. Note, the main key (*SECode*, *SysEcolCode*) or *Cite Key* needs to be globally unique. This is accomplished by using the provided script that can generate a globally unique cite key while acquiring records. *BibDesk* supports the automatic generation of such a main key, but requires additionally following customization so that *BibDesk*'s behavior fully conforms to the rules of the *LiteratureMY* system.

<sup>71</sup> This folder resides within the folder named similar to *Lit SE Aux Files 3.5r3* and is anyway to be copied to your hard disk when working with *LiteratureMY* (see also FISCHLIN & NEMECEK, 2001).

<sup>72</sup> Double-click the script and follow instructions

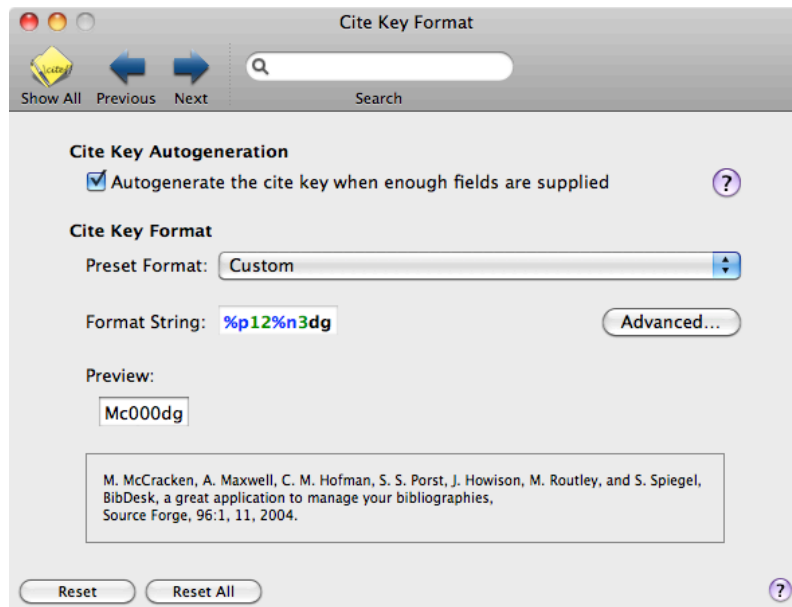
<sup>73</sup> To be on the safe side, run this script after each update of the folder *BibDesk Support* although a mere recopying of folder *BibDesk Support* to your hard disk may already suffice

<sup>74</sup> The customization needs to be done only once and updates typically require to recopy folder *BibDesk Support* to your hard disk and perhaps also to rerun *SE\_BD\_Installer.command*

<sup>75</sup> You can spare yourself this rather time-consuming customization by simply unarchiving in folder *BibDesk Support* the zip file *edu.ucsd.cs.mmccrack.bibdesk.plist.zip* and copy the resulting file *edu.ucsd.cs.mmccrack.bibdesk.plist* to folder *~/Library/Preferences*. However, you may nevertheless need to read the explanations of the recommended settings, notably when you prefer to deviate from the here recommended preference settings.

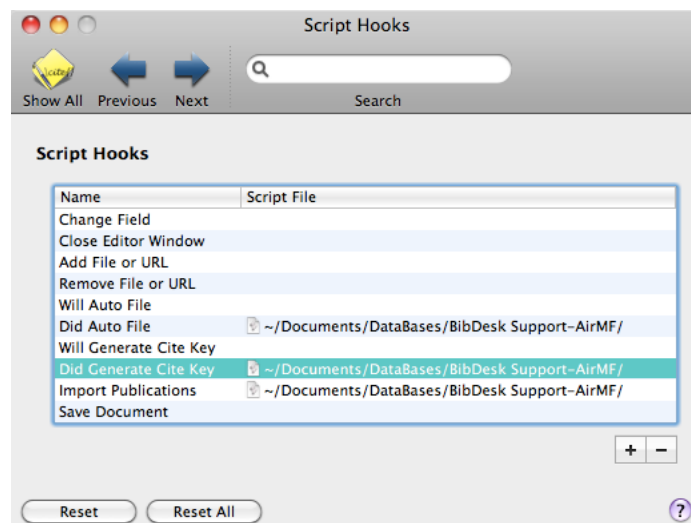
### 1.9.1.1 *Setting preferences and other installations*

1) Set your *Cite Key* preferences in *BibDesk* similar to this:



where you need to set the last characters, here ‘dg’, according to your *MY*<sup>76</sup> (or none in case *MY* is ‘af’).

2) Set your *Script Hook* preference *Did Generate Cite Key* in *BibDesk* similar to this (select hook and click + and see table below for the actual files to choose):




Now any cite key generation will follow the *LiteratureMY* rules.

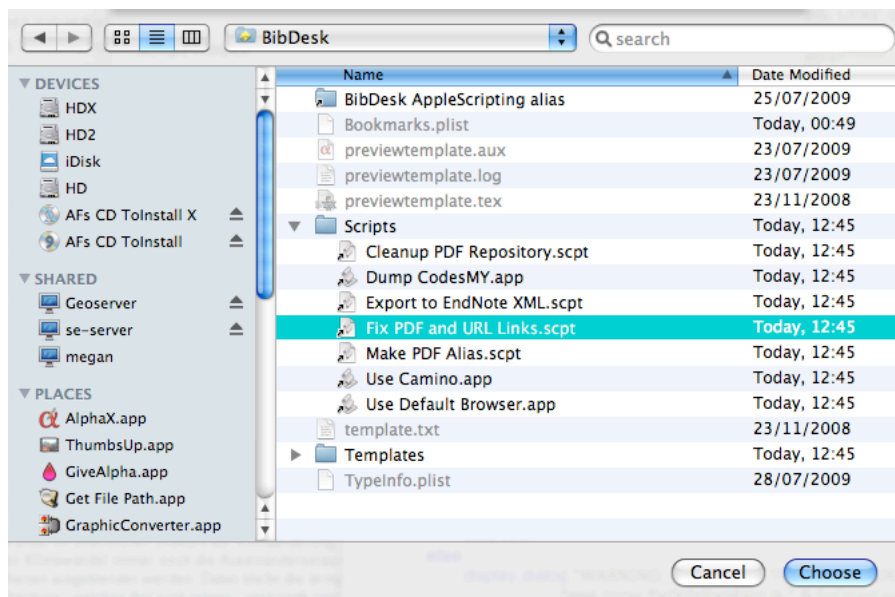
<sup>76</sup>The *Format String* specifies that the main key is to be constructed from the first 2 characters from the first author (%a12) followed by a unique number consisting of 3 digits (%n3) and the *MY* characters. The example shown here is for *MY* being ‘DG’ (Dimitrios Gyalistras; if *MY* is ‘AF’ the format string becomes %a12%n3).

Note, in case of author names with so-called von parts such as ‘van der Pool’, *BibTEX* considers the last name to be only the first capitalized word. Thus, to follow the *LiteratureMY* cite key rules, a first author such as ‘van der Pool’ should be written as ‘Van der Pool’ to make the last name start with “Va” (Kopka & Daly, 2004, p. 235).

- 3) Set the remaining *Script Hooks* (see previous step): In general *BibDesk's Script Hooks* are best specified as follows:

| Hook                         | AppleScript  |
|------------------------------|--|
| <i>Did Auto File</i>         | <i>Did_autofile.scpt</i> (or <i>Cleanup PDF Repository</i> <sup>77</sup> ) |
| <i>Did Generate Cite Key</i> | <i>Did_cite_key.scpt</i>   |
| <i>Import Publications</i>   | <i>Fix PDF and URL Links.scpt</i> <sup>78</sup>                            |

This customization step connects a particular *BibDesk* event, called a hook, with a particular AppleScript that is automatically executed whenever *BibDesk* encounters the hook event. Note, this step requires that you have previously copied folder *BibDesk Support* to your system and successfully run the installation script as described above. To specify a hook select the event, say *Did Auto File* (as shown above), and click on the  button. *BibDesk* then opens by default folder *~/Library/Application Support/BibDesk*. There in subfolder *Scripts*<sup>79</sup> you find most of the needed scripts and your file selection dialog may look similar to this:




Choose the corresponding AppleScript and you are done.

Note, hook scripts such as the crucial *Did\_cite\_key* for the event *Did Generate Cite Key* reside not in the regular script folder (shown above) as offered by *BibDesk*. Find it in your folder *BibDesk Support/Scripts/Hooks*. For all other scripts you should find a symbolic link in the regular *BibDesk* script folder.

<sup>77</sup> This is actually the very same script named differently. *Cleanup PDF Repository* is merely a symbolic link to the actual AppleScript *Did\_autofile.scpt*. Note, this script is overloaded and has three distinct, context dependent functions: (i) *BibDesk* hook (here specified), (ii) *Folder Action* and (iii) cleanup utility for your PDF Repository folder offered in *BibDesk's AppleScript* menu. Using different names for the symbolic link and the hook is useful and describes the actual purpose and function of the script depending on context and effective function.

<sup>78</sup> This script may become very slow when importing thousands of records. Disable this hook in such cases and run the script manually piecewise for a max of roughly thousand records at a time.

<sup>79</sup> i.e. *~/Library/Application Support/BibDesk/Scripts*

Why? Note, all scripts residing in folder `~/Library/Application Support/BibDesk/Scripts` are also available from within BibDesk in its AppleScript menu . Since you must not run hook script *Did\_cite\_key* from within BibDesk – it would assign a new cite key without warning – you should leave its execution only to the event *Did Generate Cite Key*. To avoid such risks, the installer script intentionally creates no symbolic link to hook script *Did\_cite\_key.scpt* in folder `~/Library/Application Support/BibDesk/Scripts`.

Finally I recommend to install also script *Did\_autofile.scpt* as a *Folder Action* script<sup>80</sup> for your pdf repository folder. This should allow you to drag and drop pdf's to your repository folder and the files are automatically stowed away into the subfolders starting with the same letter as the first author.<sup>81</sup> Don't worry, recent versions of *BibDesk* can keep track of renaming or moving files around, in case that file should already have been linked to a record in *BibDesk*. Having the *BibDesk* hook *Did Auto File* as well as a *Folder Action* active at the same time may occasionally cause incomplete stowing away of pdf's.<sup>82</sup> Note, in such cases you can always as a last resort manually execute the script *Did\_autofile.scpt* anytime: Simply run the script from within *BibDesk* by choosing menu command *Cleanup PDF Repository*<sup>83</sup> from *BibDesk*'s AppleScript menu.

- 4) Choose menu command *Dump CodesMY* from *BibDesk*'s AppleScript menu. Upon successful completion you should have file *DumpOfCodesMY*<sup>84</sup> in your literature work folder<sup>85</sup>.

Now you should be ready to acquire new records from within *BibDesk* and *BibDesk* will assign automatically a proper main key (*SECode* or *cite key*) anytime you import new records (see also below, Section «Using *BibDesk* - a short tutorial»). Note, this technique offers not only the advantage of generating conveniently a main key unique within the current *BibDesk* file, but also across several *BibDesk* files, may they be currently open or not. This extends the normal *BibDesk* capabilities of generating cite keys considerably, since by default cite keys are only unique within the same *BibTEX* file. Moreover, this technique avoids also conflicts with the keys already used by the *LiteratureMY* system. However, be warned, please adhere to the usage rules as described above in the yellow box.

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<sup>80</sup> This script was previously also called *pdfwar - Store In Letter Folder*. The latter is still made available in the release, but is obsoleted by the new, more versatile *Did\_autofile.scpt*. I recommend to use only the new hook script as the *Action Folder* for your pdf repository folder.

<sup>81</sup> As of this writing, 26.Sep.2009, script *Did\_autofile.scpt* does log its activities. You can easily inspect this log by launching application *Console* from your folder `/Applications/Utilities` and view the log file *BibDesk.log* or by double clicking file `~/Library/Logs/BibDesk.log`.

<sup>82</sup> Note, this implies, if you use script *Did\_autofile.scpt* as a *Folder Action* for your repository folder, that this may interfere with the hook *Did Auto File* also calling script *Did\_autofile.scpt*. However, this may depend on actual speed of your system and other real time issues. Try it out and adjust your configuration accordingly!

<sup>83</sup> This menu command actually executes script *Did\_autofile.scpt* (symbolic link in *BibDesk*'s scripts folder to file *Did\_autofile.scpt*)

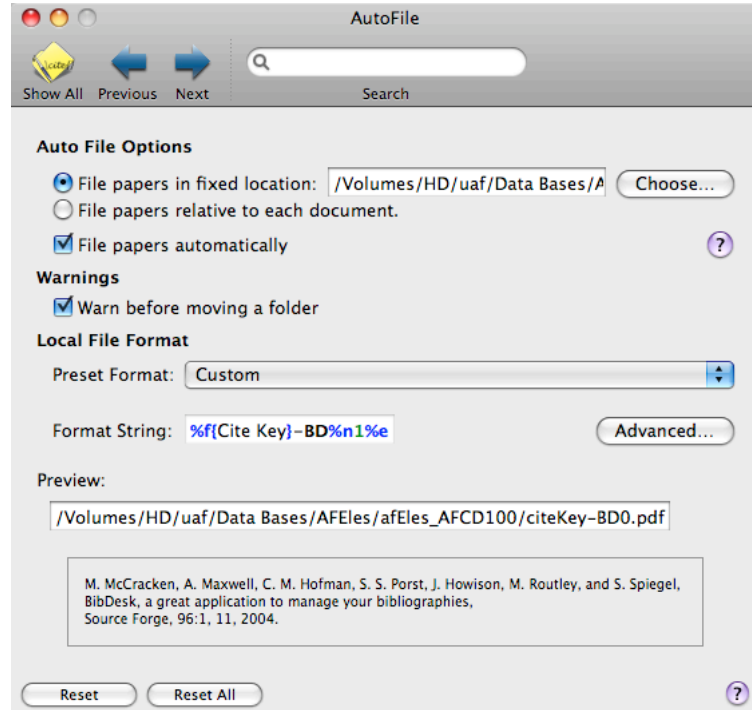
<sup>84</sup> *MY* will actually be translated to your initials as defined by shell variable *LITUSER*, e.g. *DumpOfCodesAF*. The value of *LITUSER* is assigned automatically as sourced from file `~/bin/LITMYPATH.txt` (provided with distribution of package *EndNote SE Add Ons...*).

<sup>85</sup> as defined by shell variable *LITMY*, e.g. `~/Volumes/HD/uaf/Data Bases/AFs Lit` (may contain blanks). The value of *LITUSER* is assigned automatically as sourced from file `~/bin/LITMYPATH.txt` (provided with distribution of package *EndNote SE Add Ons...*).



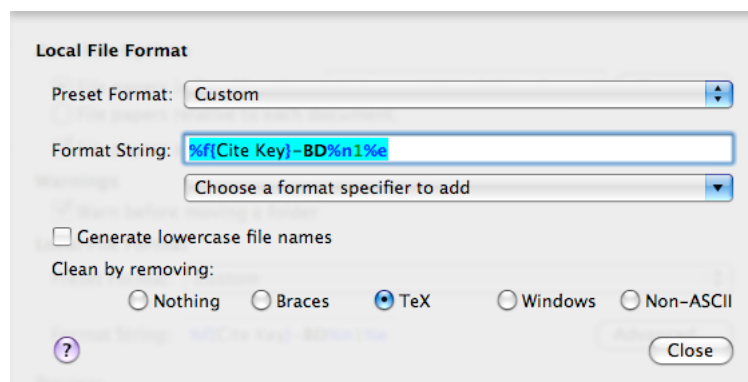
Be warned: If you violate any of above rules (see yellow box) you risk that incorrect main keys are assigned while adding new records!

5) Set your *AutoFile* preferences in *BibDesk* similar to this:



where the folder in which you keep your pdf's – the pdf repository folder – needs to be specified once using button **Choose...** Choose....

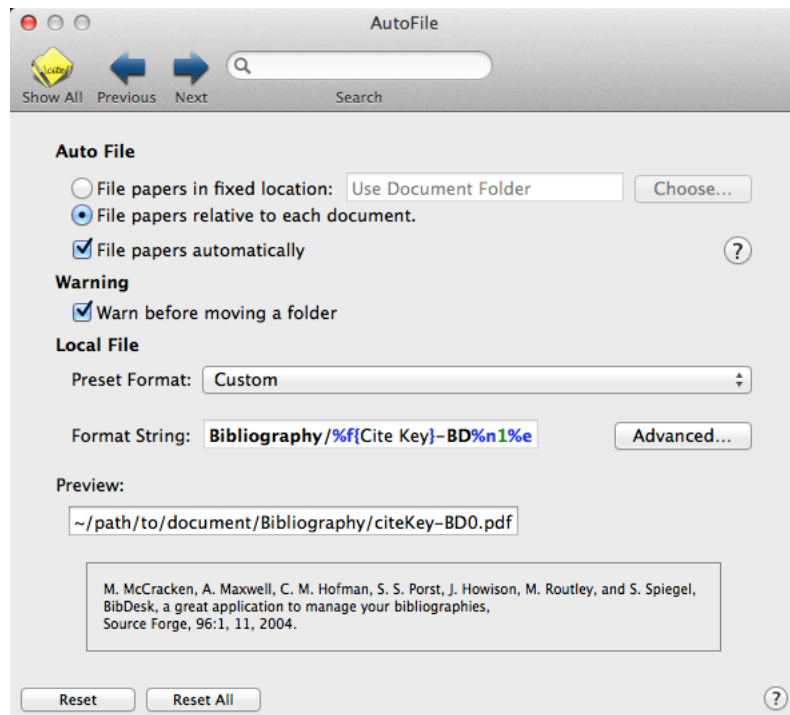
You have also to use the button **Advanced...** to enter the *Format String* for local files similar to this:



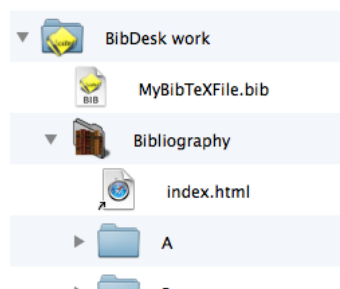
Any pdf you drag and drop onto *BibDesk*'s side pane to the right will then be linked to the record, automatically renamed according to the rules, and is even conveniently moved to the specified pdf repository folder. Moreover opening pdf's is then not only possible from within *BibDesk*, but also from within *EndNote* as well as

*LiteratureMY*.<sup>86</sup> The renaming and moving of pdf's (*BibDesk* calls this feature *AutoFile*) happens automatically if you check the preference "File papers automatically"  *File papers automatically* (recommended<sup>87</sup>). Having this preference off may also be an option, since you can autofile pdf's for some selected publications later anytime by choosing within *BibDesk* the menu command "Publication -> AutoFile Linked Files...". Experiment and choose this preference to your taste.

Alternatively, e.g. if you wish to create a self-contained folder holding the *BibTEX* file along the pdf repository, then it is also possible to define the preferences as follows:



Note that the relative path to the actual pdf repository has to be entered as a prefix to the 'Format String'. In above example the relative path denotes the folder 'Bibliography' that resides beside the *BibTEX* file 'MyBibTeXFile.bib'. Here the *Finder* view for above example:



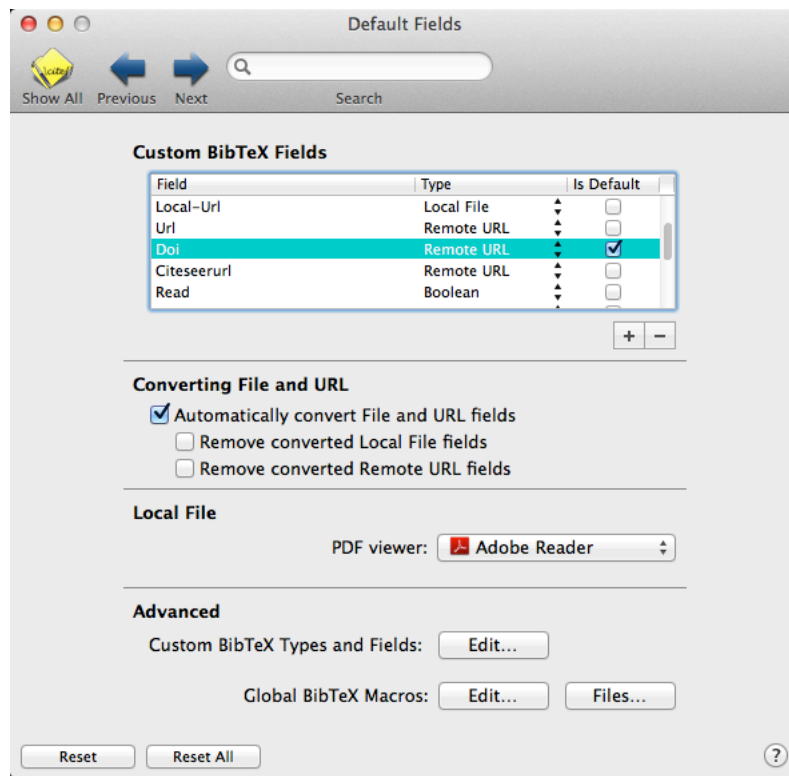
With such settings you may move folder 'BibDesk work' freely. However note, each move typically requires to adjust also the content of file '~/bin/LITMYPATH.txt'

<sup>86</sup> It may be preferable to specify the same shortcut for opening pdf's in all applications as *EndNote* provides, i.e. Command-Option-P by defining this very same keyboard shortcut in the *System Preferences* pane *Keyboard & Mouse* for *FileMaker* as well as *BibDesk*.

<sup>87</sup> The reason is that you may link to pdf's stored in temporary directories that get occasionally cleared, e.g. for sure during a system restart. Thus it is generally safer to immediately move pdf's to where they should be.

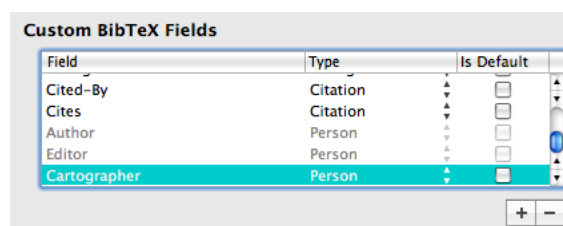
accordingly to ensure all *BibDesk* AppleScripts work normally and without warnings.

6) Set your *Default Fields* (= *Fields*) preferences in *BibDesk* to this:

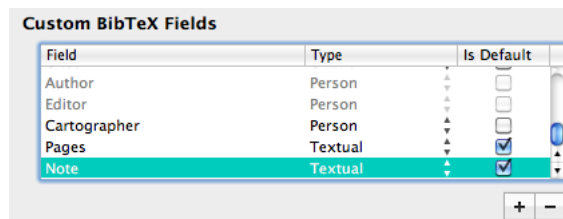


I highly recommend to at least check field *Doi* for optimal cooperation between *BibDesk* and *LiteratureMY*, but you may wish to customize *Fields* further once you learned better how to use *BibDesk*.

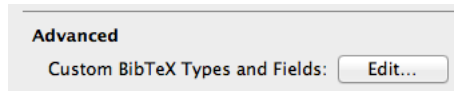
To fully support the reference type *Map*, you should also define the non-standard *BibTeX* field *Cartographer* as being of type *Person*. Click on the **+** button and enter following specifications:



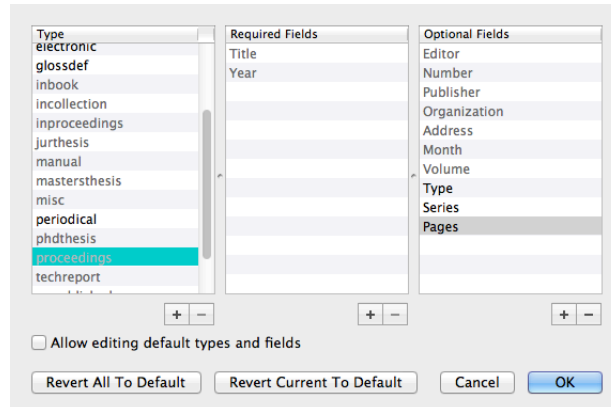
Then make also sure *BibTeX* fields *Pages* and *Note* are available for all reference types. If necessary click on the **+** button and enter specifications as shown here:



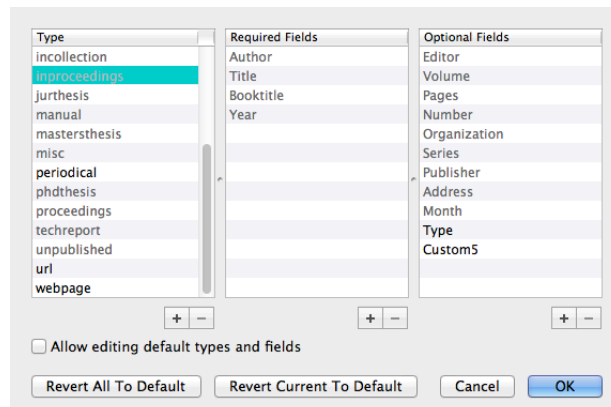
Finally the fields of the reference types proceedings and inproceedings defaults are insufficient for our system. Click in section 'Advanced' on button 'Edit...'



and add for type *proceedings* the fields *type*, *series*<sup>88</sup>, *pages*, and optionally *custom5*<sup>◇</sup> (not shown) under *Optional Fields*:



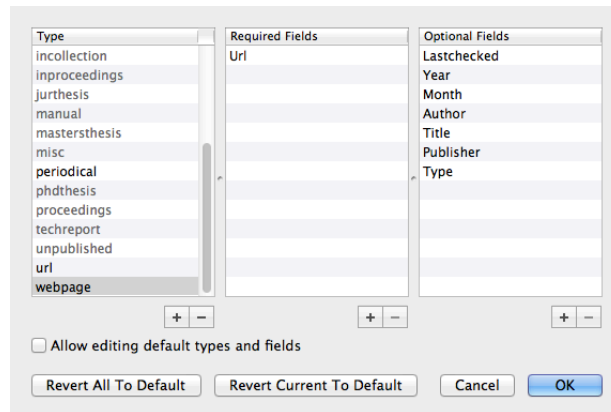
similarly add for *inproceedings* field *type* and optionally field *custom5*<sup>◇</sup> (shown):



similarly I recommend to add for reference type *webpage* fields *Author*, *Title*, *Publisher*, and *Type*:

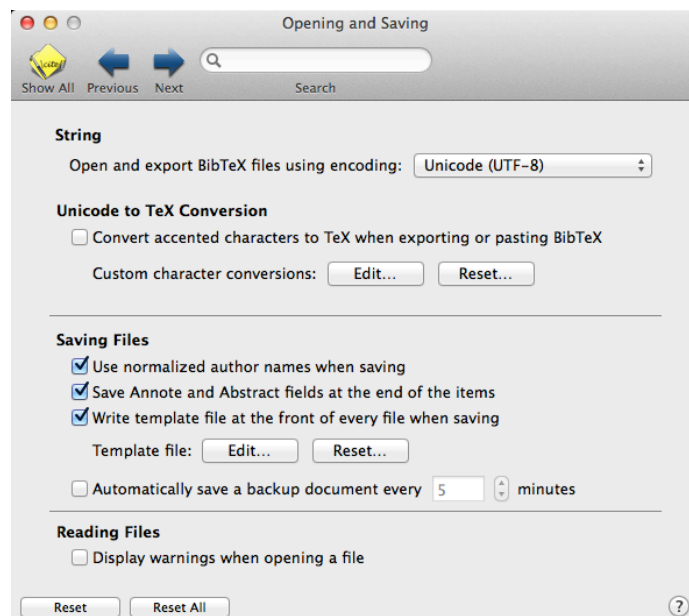
<sup>88</sup> Series is the field to hold *LiteratureMY* field *SeriesTitle*.

<sup>◇</sup> Note that for *LiteratureMY* field *SeriesEditor* exists no corresponding *BibTeX* field and the information is stored in field *custom5* together with other field data that do not fit into the *BibTeX* scheme (cf. Section «Exporting to *BibTeX* files»). Yet, you can enter in BibDesk series editors by entering into field *custom5* the series editor(s) between this prefix ‘REFTYPE OWNERS USERS REFSTATUS ENTRYDATE MODIFIED TH C6 C7 SE’ and this suffix ‘MF’. Ex. For series editor Felix Smith you would enter into field *custom5*: ‘REFTYPE OWNERS USERS REFSTATUS ENTRYDATE MODIFIED TH C6 C7 SE Smith, Felix MF’. However it may be more convenient to enter that information using *FileMaker* once the record has been transferred to *LiteratureMY* (field labelled ‘SeriesEds.’). Thus add field *custom5* or not according to your data entry preference.



I highly recommend to automatically convert added files and URLs, i.e. to have preference “Automatically convert File and URL fields” checked. This means that pdf’s and URLs are shown in the right side pane as active thumbnails upon entering *BibDesk* , e.g. as a result from a transfer from *LiteratureMY* to *BibDesk* or other means of importing records. Set the checkboxes to your linking. The first checkbbos keeps or removes upon conversion the field *Local-Url*. That is always used during imports and denotes the attached pdf. Once imported there remains little use for that field. On the other hand, if working with *Mendeley* then that checkbox should remain unchecked to support automatic pdf attachment during imports. Concerning checkbox “Remove converted Remote URL fields”, I personally prefer to keep the old-fashioned fields *Url* and *Doi* intact. If you check it, any possibly present field *Url* and *Doi* will also be emptied (*Doi*<sup>89</sup>) and/or removed as redundant from the record (*Url*). More can also be learned in the next Section «Using *BibDesk* - a short tutorial».

7) Set your *Opening and Saving* (= *Files*) preferences in *BibDesk* to this:



I recommend to use above settings to ensure all special symbols are properly transferred among all systems always. Abstracts containing texts such as “...no more than 2°C.” can then be read without any trouble in *BibDesk*, *EndNote* and

<sup>89</sup> The field *Doi* is shown as present, yet empty, if it has been checked to be present by default as shown above

*LiteratureMY*. However, if you write a paper with *LaTeX*, then other preferences are preferable and you may need to check the *Unicode to TeX Conversion*.

Writing with *LaTeX* requires *Unicode to TeX Conversion* saved *BibTeX*-files, i.e. preference *Convert accented characters to TeX when exporting or pasting BibTeX* needs to be checked. Fortunately, *BibDesk* can do the *Unicode to TeX Conversion* on the fly. Merely save your bibliography after having checked the preference *Convert accented characters to TeX when exporting or pasting BibTeX* and then, once saved, you are free to uncheck that option again according to the here recommended preferences. It is therefore recommended to do this save to another read-only *BibTeX*-file, the one actually used by *LaTeX*, which typically resides in the same folder as your master *TeX*-file and keep the master *BibDesk* file where you manage the references not only separate, but store it always with above recommended settings.

Standard *TeX* coding of special characters such as Umlaute is sometimes ugly to read in *BibDesk* (unless exactly the same formatting is used; e.g. ‘ü’ can be correctly coded in *LaTeX* as ‘\’{u}’ or ‘\’{u}’; *BibDesk* handles only the latter format correctly<sup>90</sup>). It is therefore preferable to have always option *Unicode to TeX Conversion* unchecked and to save all *BibTeX*-files with UTF-8 encoding except for the read-only *BibTeX*-files actually actually used by *LaTeX*(see above).

Conversions between encodings are tricky. Since there may still arise the need to use other encodings than the above shown ones<sup>91</sup>, in partiucular also the traditional ‘Western (Mac OS Roman)’ encoding for the Macintosh platform, read footnote <sup>92</sup> for important hints on handling such situations. Moreover, our data base system offers many utilities and scripts supporting conversions, in particular when compatibility issues arise<sup>93</sup> (see also section 2.5 «Conversion utilities»).

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<sup>90</sup> This means that not all legal *BibTeX* syntax, as e.g. obtained from a web site offering a *BibTeX* citation export service, can be properly handled by *BibDesk*. The utility *deTeXforBD.sh* (part of distribution of package *EndNote SE Add Ons...*) helps you by converting all legal *BibTeX* syntax to a common encoding, e.g. UTF-8, that *BibDesk* can actually handle.

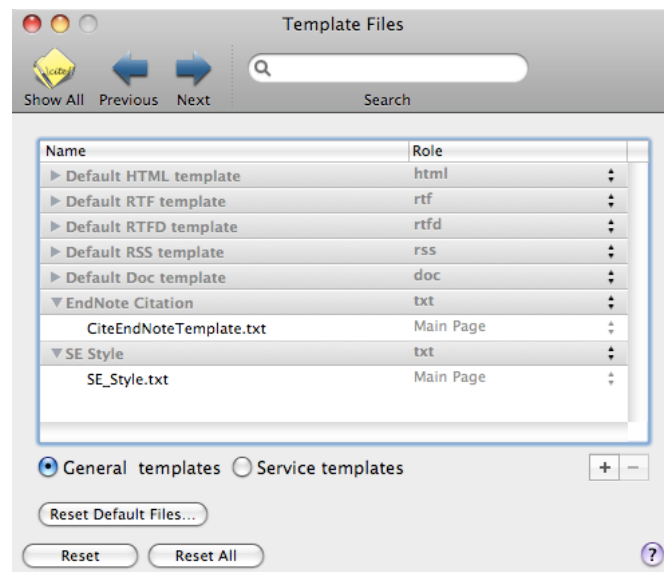
<sup>91</sup> As of this writing all components of the here described data base system (26.May.2016, version 3.7r16 including *AlphaX’ EndNote Menu v2.2* and later) support now fully UTF-8 encoding throughout. Since considerably more powerful than ‘Western (Mac OS Roman)’, UTF-8 is therefore now the recommended default encoding (see above figure *Opening and Saving (= Files)* preferences). Note however, on the Mac platform, only the traditional ‘Western (Mac OS Roman)’ encoding offers still maximal compatibility with other programs such as *Excel*, which cannot import UTF-8 as of this writing (2.Feb.2016) or *AlphaX v8.2.3*, which does not show UTF-8 encoding in a readable manner. In such cases you may therefore wish or need to go back to ‘Western (Mac OS Roman)’ encoding.

<sup>92</sup> Note that *BibDesk* cannot change the encoding during the opening of a *BibTeX*-file (bib-file). Say a file is stored in ‘Western (Mac OS Roman)’ and you set the ‘Opening and Saving’ preference here to encoding UTF-8, *BibDesk* throws a warning message during an open attempt (as of this writing Version 1.6.5 (3713), 2.Feb.2016). To lose no information it is in such a case best to stick always to the original file encoding during the opening of *BibTeX*-files, i.e. click button ‘Reopen’ (and not ‘Ignore’). You can nevertheless use *BibDesk* to change conveniently the encoding, say from ‘Western (Mac OS Roman)’ to UTF-8: Simply open the *BibTeX*-file in the original encoding and then export its content to a new file (menu command “File -> Export...”) in the new wanted encoding. Alternatively, thanks to the fact that *BibTeX*-files are simple text files, you can also use commando line tools such as utility ‘mac2utf8’ or ‘iconv’ to convert encodings of *BibTeX*-files.

<sup>93</sup> Notably see utility *utf82mac* for details and the *BibDesk* AppleScripts *Fix-Paste Abstract.scpt* and *Fix DOI and Case In Title, Author.scpt*, which can deal with many situations, notably also with difficult mixed encodings as one encounters today frequently with citation exports, where often messy and mixed encodings result or even basic syntax, e.g. of *BibTeX*, is violated. These scripts perform elegantly and robustly multiple conversions in a

Optionally you can also customize *BibDesk* to support *EndNote* citations:

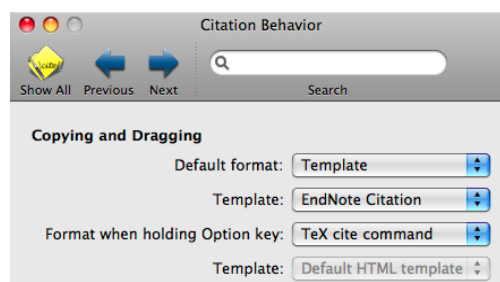
8) (optional, recommended) Set your *Template Files* (= *Templates*) preferences to this:



while using the template files *CiteEndNoteTemplate.txt* and *SE\_Style.txt* (actually symbolic links as installed by *SE\_BD\_Installer.command*) from folder ‘~/Library/Application Support/BibDesk/Templates/’. As a result you may choose menu command "Edit -> Copy As" with the template *EndNote Citation* to get exactly an *EndNote* conformant temporary citation in your clipboard, which you can paste e.g. into a *Microsoft Word* document. The standard *Services* menu may also provide easy access to such a clipboard in applications that support *Services*.

Choosing menu command "Edit -> Copy As" with template *SE Style* will give you in the clipboard a full reference as used in a list of references. For really convenient use of this template I have defined keyboard shortcut Ctrl-K (in analogy to *EndNote*'s Cmd-K) for *SE Style*. Do this in the *System Preferences* pane *Keyboard & Mouse* for *BibDesk* (see below), following the technique as described in Section «New helper scripts».

9) (optional) Set your *Citation Behavior* (= *Citation*) preferences similar to this:

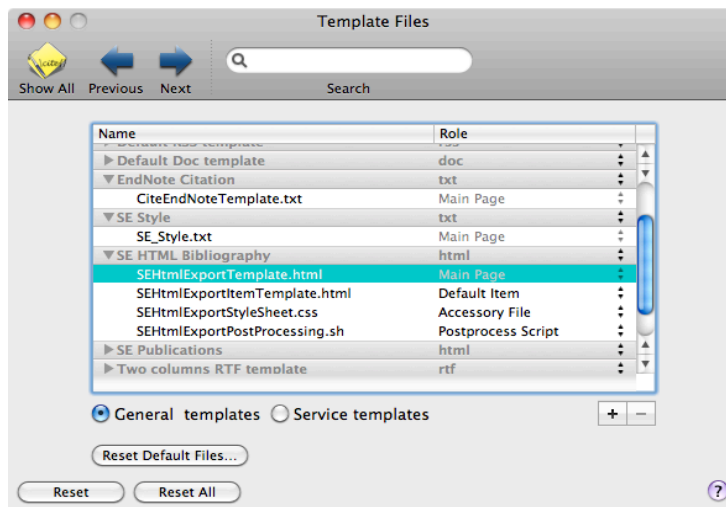


As a result you may now even drag and drop from *BibDesk* to *Word* to get an *EndNote* conformant temporary citation or get it via clipboard by choosing standard menu command “Edit -> Copy” (Cmd-C). All very convenient!

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series that produce in the end a consistent encoding throughout as actually required by the current *BibDesk* preferences.

- 10) (optional) Extend your *Template Files* preferences in *BibDesk* further to support extraction of bibliographies using the AppleScripts *Extract Bibliography* and *Extract For e-Reading*:



If you install a template named *SE HTML Bibliography* as shown above you enable following: First, you can choose menu command "Edit -> Copy As -> Template -> SE HTML Bibliography" and you will have in the clipboard the html code for an entire web page that lists all currently selected publications. Secondly, you can run AppleScripts *Extract Bibliography* and *Extract For e-Reading*. *Extract Bibliography* will generate an entire folder that contains not only a web page (*index.html*) listing all currently selected publications, but will also copy all original pdf's linked to those publications. The links in the web page allow to read the copied pdf's outside and independently from *BibDesk*. This supports the extraction of entire bibliographies, e.g. the publishing of a project specific bibliography on the internet or for archiving purposes. AppleScript *Extract For e-Reading* behaves similarly, however it creates not a separate folder but updates incrementally the so-called 'e-Reading folder' by a html page and the corresponding pdf's. The 'e-Reading folder' is thought to be synced via a cloud service such as *Dropbox* with an e-Reader, e.g. an iPad.

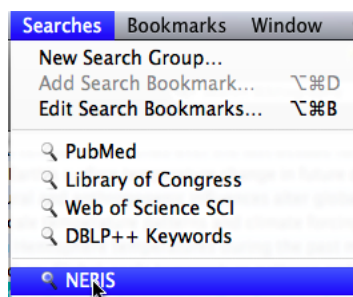
Note, AppleScript *Extract Bibliography* serves the same purpose as utility *MakeFileIndex*. Similar to *MakeFileIndex* you can control certain elements of the resulting web page by specifying flags or strings in the same data frame file<sup>94</sup> that you can use to control the behavior of utility *MakeFileIndex*. As of this writing the following parameters are supported by *SE HTML Bibliography* installed to call the post processing shell script *SEHtmlExportPostProcessing.sh*:

<sup>94</sup> This file is called *MakeFileIndex.DTF* and is also distributed as part of *BibDesk Support* (subfolder *Templates*). Move *MakeFileIndex.DTF* to your pdf repository folder and edit it to your liking before using AppleScript *Extract Bibliography* (note, however, the post processing shell script works independently from *BibDesk* and will therefore retrieve the pdf repository folder location only from file *~/bin/LITMYPATH.txt*, not from *BibDesk*'s preference settings). For instance *MakeFileIndex.DTF* allows you to specify the heading (value definition for string *TitleAddon*) for your web page bibliography as contained in the generated file *index.html*. Note, if file *MakeFileIndex.DTF* is not present, you won't be warned and default assumptions are made. Moreover, note, the CSS file *SEHtmlExportStyleSheet.css* allows full control over the appearance of the web page as generated by AppleScript *Extract Bibliography*, even after its generation. However, note, upon each extraction a new copy from the original CSS file residing within folder *BibDesk Support* will be made and the CSS file residing in the destination folder will be overwritten upon each script execution. Edit either the original or edit the copy only once all is perfectly extracted.

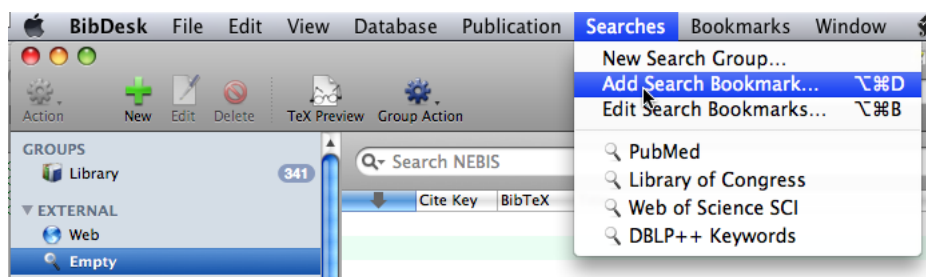


- PDFsInNewWindow (flag causing pdf's opening in separate window)
- FileListFile (name of index file)
- TitleAddon (text fragment used in web page title)

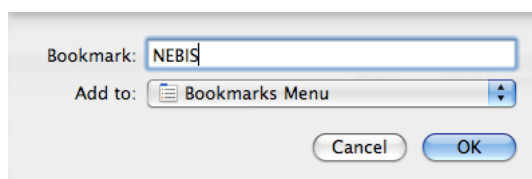
11) (optional, recommended) install the capability to search in the NEBIS system. The goal of this installation is to have in the *Searches* menu a new permanent search group *NEBIS* available as this:



The distribution *BibDesk Support* contains a folder *Searches* that contains the needed file *NEBIS-zoom.bdssearch*. Drop<sup>95</sup> the *.bdssearch*-file on the left *Groups* pane of any currently open *BibDesk* window. Then make that new search group permanent by selecting it and choose menu command “Searches -> Add Search Bookmark...”



Note, in newer *BibDesk* versions the newly created search group may be named NEBIS and not merely *Empty*<sup>96</sup>. Before clicking OK<sup>97</sup> for permanent adding rename the search group for easier recognition similar to this



Finally edit the appearance to your liking for instance by inserting separators or edit any time other properties by using menu command “Searches -> Edit Search Bookmarks”. You can now easily search in NEBIS anytime by choosing the menu command “Searches -> NEBIS”.

<sup>95</sup> Alternatively simply double-click the *.bdssearch*-file and you will get a new search group in the *Groups* pane

<sup>96</sup> See that the search field shows the involved search service, i.e. greyed out text *Search NEBIS*. Note, the bottom of the window, the so-called status bar, shows similar information for the currently selected search group. If not visible choose menu command “View -> Show Status Bar”.

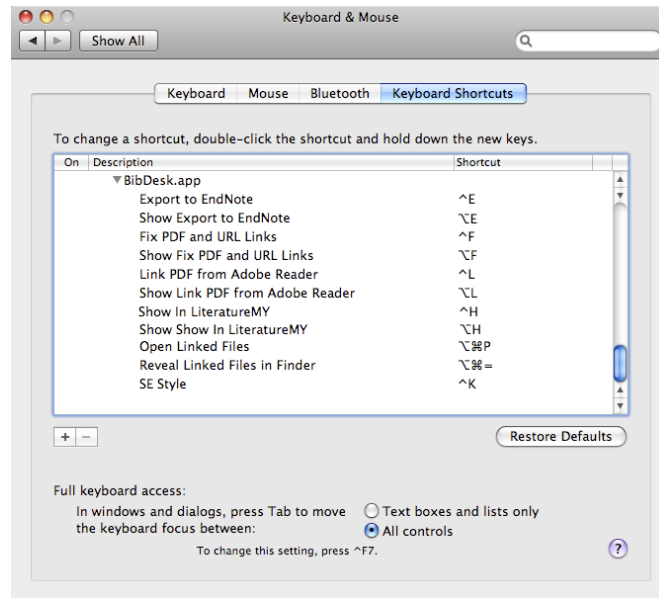
<sup>97</sup> Older *BibDesk* versions, e.g. 1.4 (1758), offered only *Bookmarks Menu* as *Add to* choice. This was confusing. In case, ignore this, since the search group will actually be added to menu *Searches* and not *Bookmarks*.

Further instructions on search groups can be found at:

[http://sourceforge.net/apps/mediawiki/bibdesk/index.php?title=BibDesk\\_Search\\_Groups](http://sourceforge.net/apps/mediawiki/bibdesk/index.php?title=BibDesk_Search_Groups)

### 1.9.1.2 Recommended shortcuts

Here a possible set of keyboard shortcuts<sup>98</sup> to be used with *BibDesk*:



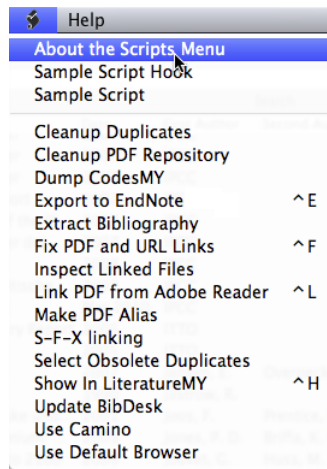
Note that two keyboard shortcuts are defined for each AppleScript command for which we define a shortcut. The first is the ordinary one, whereas the second command is prefixed by the phrase “Show “ and uses as modifier the option key ⇧. This overcomes a bug in Mac OS X<sup>99</sup>, to avoid having for each AppleScript menu with a shortcut command two menu items present at all times, regardless whether you press the option key ⇧ or not.‡

<sup>98</sup> All recommended shortcuts can be easily installed by double-clicking the script *Install-FM-hotkeys.command*

<sup>99</sup> Present in Mac OS X 10.5.8 (Leopard) and Mac OS X 10.6.3 (Snow Leopard)

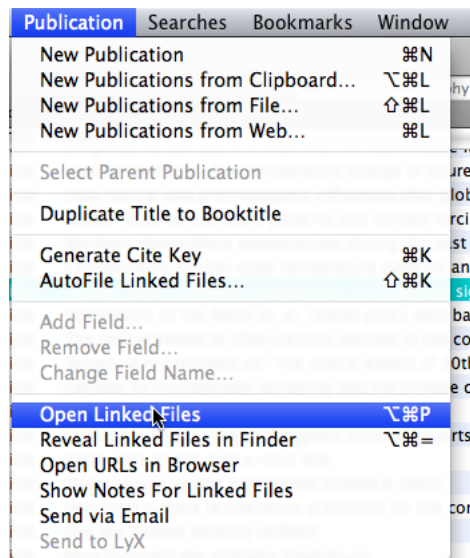
‡ *BibDesk*’s AppleScript menu offers the possibility to edit any installed AppleScript by using the Option key ⇧ as modifier: Then every menu command turns into a “Show <command>”. If you choose such a “Show <command>”, the corresponding AppleScript will be opened in the AppleScript editor (*Script Editor* or *AppleScript Editor*). Note I know of no technique to hide the extra “Show ...” command if you use a combination shortcut involving also the ⇧-key such as Command-Option-R. Thus I try to use as much as possible only Control-<key> (^<key>) shortcuts.

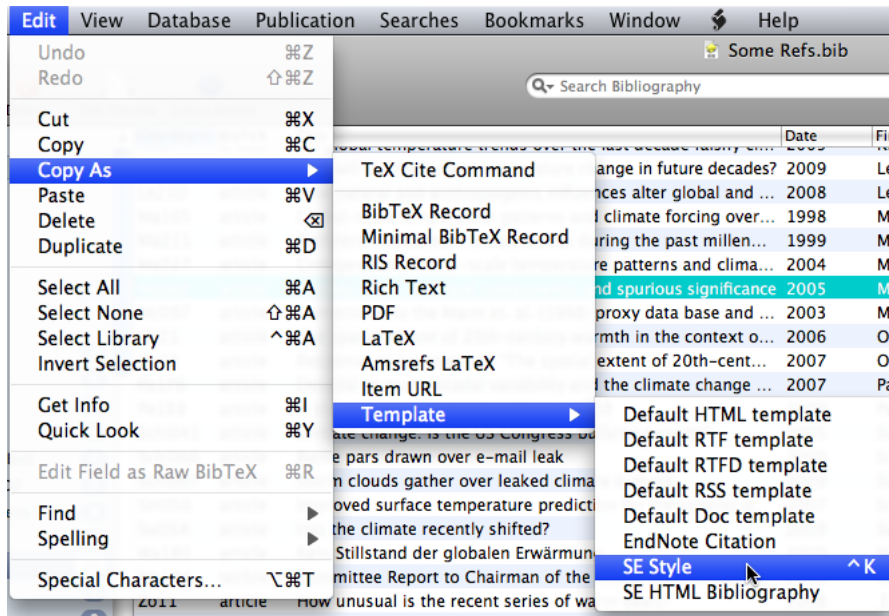
The result of above customization results in following AppleScript menu (note, the actual menu may deviate from the one shown here, see below for most recent version):



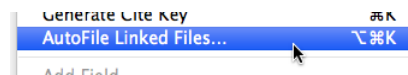
To make good use of the provided *AppleScripts* read their explanations after having opened them in the *Script Editor*.<sup>‡</sup> Some of these scripts can also be easily customized by changing their property values that serve as preferences. The provided comment texts explain their use.

The above described customization of keyboard shortcuts changed other *BibDesk* menus as follows:

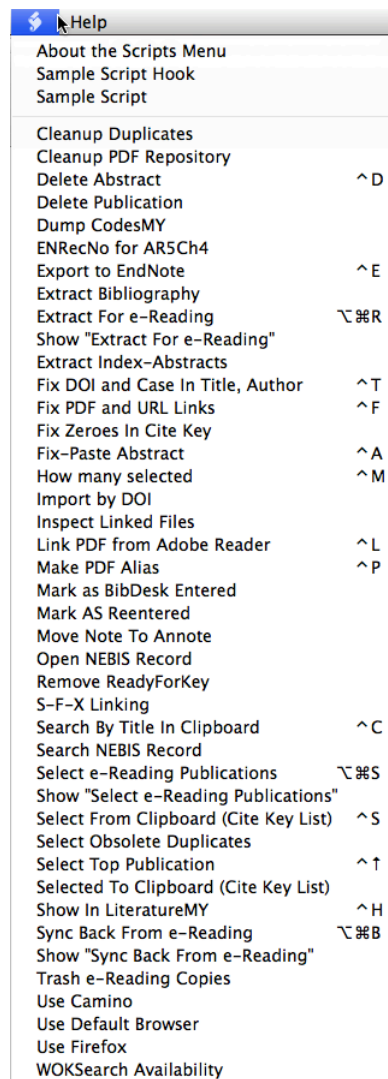




In addition to the keyboard shortcuts described above, I use also the following shortcut for *BibDesk* overriding *BibDesk*'s default Command-Shift-K, which avoids conflicts with other system-wide shortcuts I have in use (I reserve Command-Shift-<key> for jumping to folders):



The most recent script collection installed by default<sup>100</sup> plus some personal AppleScripts and applying my shortcut customization gives an AppleScript menu that looks similar to this:



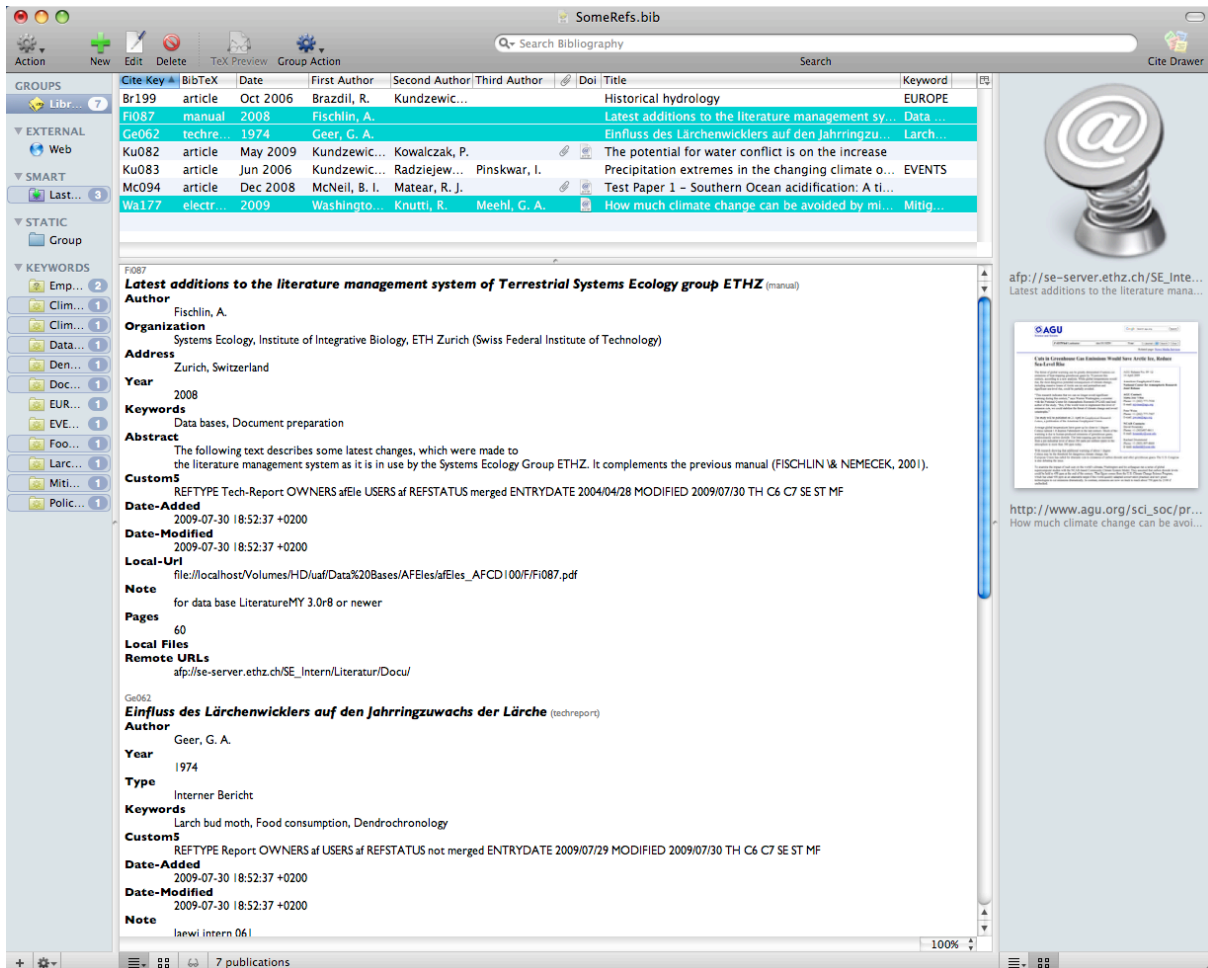
Note, the superfluous entries 'Show "Extract For e-Reading"', 'Show "Select e-Reading Publications"', and 'Show "Sync Back From e-Reading"' are not intended and spuriously generated by the operating system (see footnote<sup>3</sup>). Unfortunately I know of no technique to circumvent the display of those unwanted menu commands, except to use a shortcut that does not involve the Option key  $\vee$  as a modifier, e.g. Ctrl-R or Ctrl-B. But I like my shortcuts, since the modifiers as shown here are the same as those I use for the related commands that open or reveal pdf's in the three applications *FileMaker*, *EndNote*, and *BibDesk*, meaning I can use in all applications the very same shortcuts for the same purpose.

In case of difficulties with *BibDesk*'s configuration consult also Appendix A7 «Troubleshooting hints».

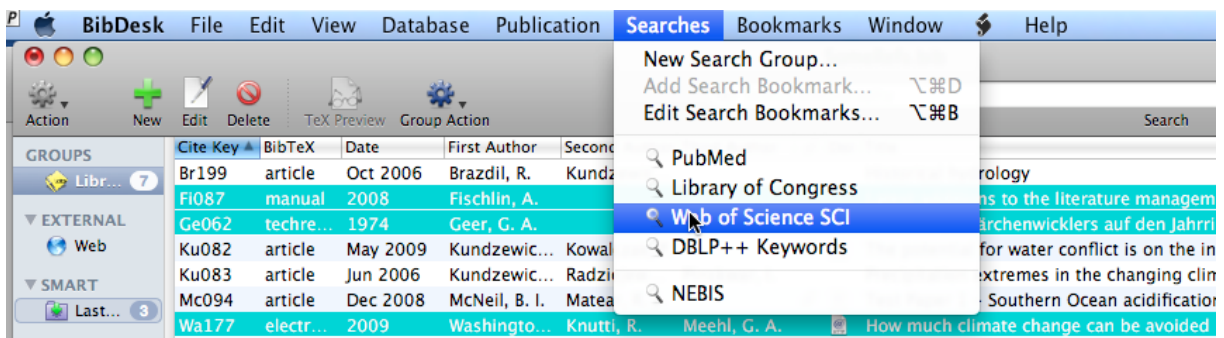
<sup>100</sup> i.e. running installation script *SE\_BD\_Installer.command*

### 1.9.2 USING *BIBDESK* - A SHORT TUTORIAL

Once customized as described in previous section try it out. Launch *LiteratureMY*, select some records and choose *FileMaker* script «Export to BibDesk». *BibDesk* is launched and your records should appear in a new window. In case *BibDesk* was already running and had some bib-file open, the records will be imported and are shown highlighted within the frontmost window similar to this:



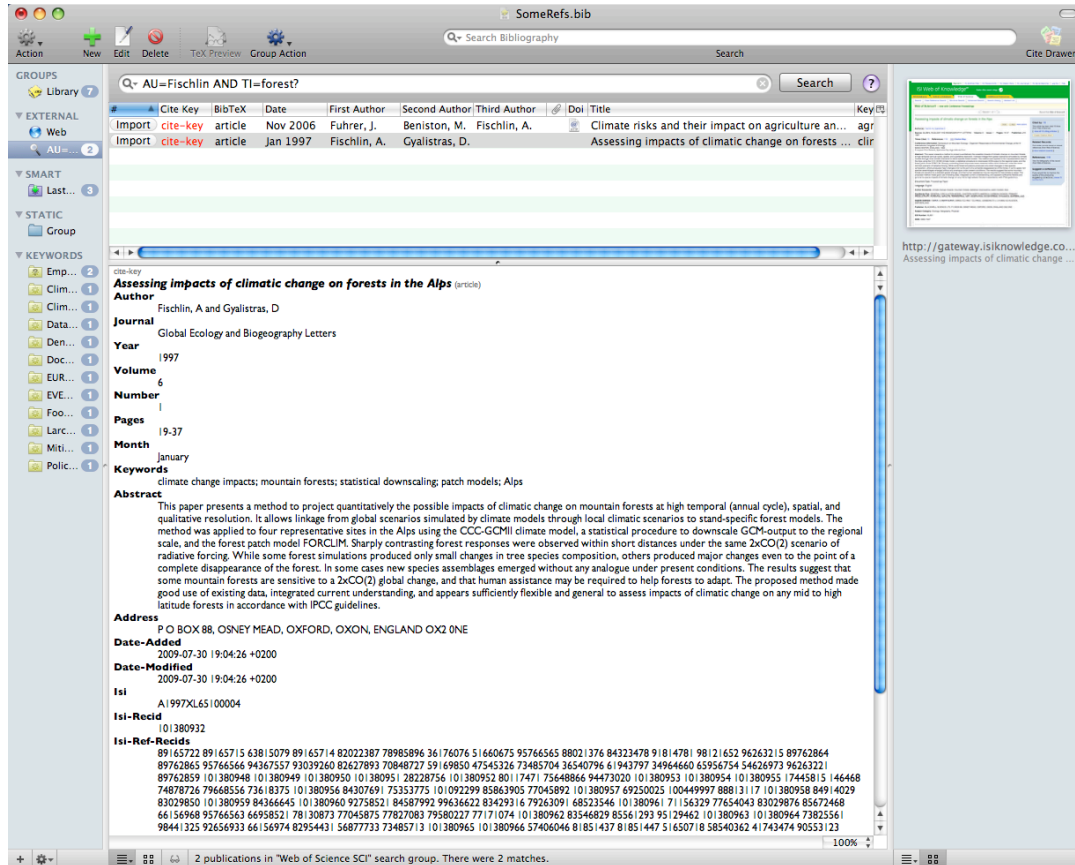
Secondly try to acquire some references from ISI Web of Science by choosing menu command “Searches -> Web of Science SCI”:



Then type

AU=Fischlin AND TI=forest?

into the appearing search field and press return you should get something similar to this:



Queries of ISI Web of Science can be any boolean expression using these field tags<sup>101</sup>:

- AD=Address
- AU=Author
- CF=Conference
- CI=City
- CU=Country
- ED=Editor
- FG=Grant Number
- FO=Funding Agency
- FT=Funding Text
- GP=Group Author
- OG=Organization
- PS=Province/State
- PY=Year Published
- SA=Street Address
- SG=Suborganization
- SO=Publication Name
- TI=Title
- TS=Topic
- ZP=Zip/Postal Code

| Index | Meaning                     |
|-------|-----------------------------|
| au    | Personal author name        |
| ti    | Title                       |
| isbn  | ISBN                        |
| issn  | ISSN                        |
| cc    | Local classification number |
| su    | Subject key words           |
| date  | Date                        |
| dp    | Date of publication         |
| da    | Acquisition date            |
| la    | Language code               |
| ab    | Abstract                    |
| note  | Note                        |
| af    | Conference as author name   |

or NEBIS, a Z39.50 service, uses these tags:

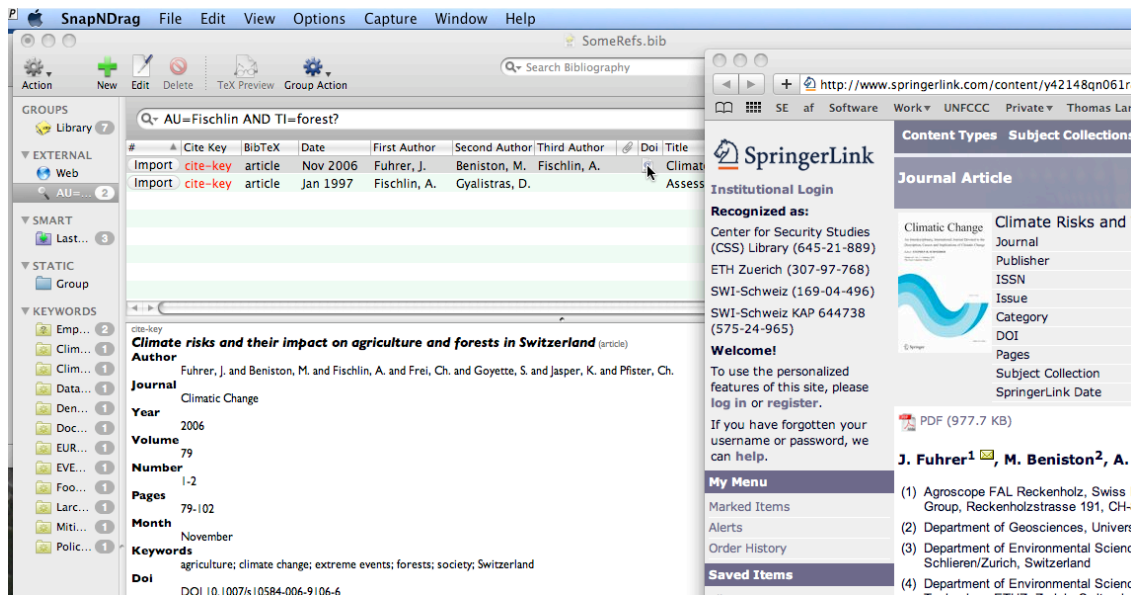
Ex.: ISI WOS: ((ts="larch bud moth" OR ts="larch budmoth" OR ts="Zeiraphera diniana") AND (py=2000-2008)) OR ((au=Nemecek T\*) AND (py=1995 OR py=1996)). NEBIS: au="Fischlin, Margrit". PubMed: "Fischlin A" [AU] AND (gap [ALL] OR forest\* [TIAB]) (see also Appendix A12).

Note I have customized the columns display by using the popup menu at the right corner and inserting the field *Doi* (using Add Other...) into the default display and having rearranged the order as shown here. This offers the advantage that you can immediately jump to a paper via

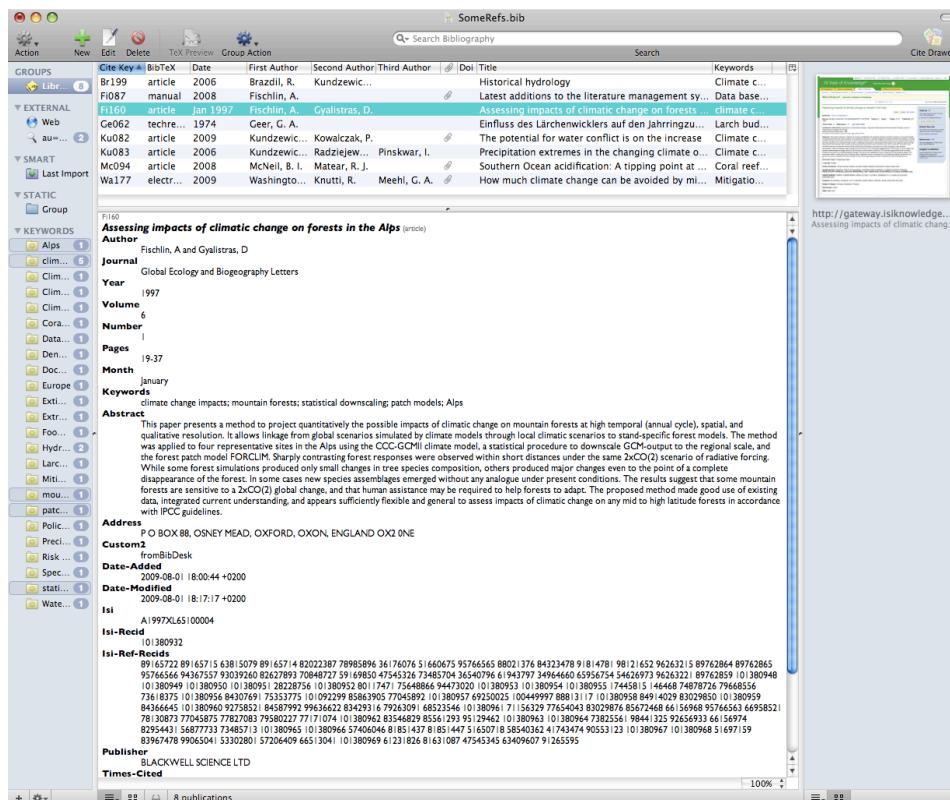
<sup>101</sup> Further details on how to encode such searches can be found in *BibDesk*'s help system (topic «Searching External Databases») and at [http://images.isiknowledge.com/WOK46/help/WOS/h\\_advanced\\_fieldtags.html](http://images.isiknowledge.com/WOK46/help/WOS/h_advanced_fieldtags.html)



its DOI. Try it out and you should get something similar to this:





You may decide you are not really interested in the FUHRER *et al.* (2006) paper but wish to keep FISCHLIN & GYALISTRAS (1997) (assuming this record is really missing in your *LiteratureMY*<sup>102</sup>). Accomplish the import by clicking onto the little import button in the leftmost column, i.e. **Import cite**. Then leave the searching in ISI WOS Group and go back to the group *Library* by clicking on the yellow *BibDesk* icon at the top. The result should look similar to this:



<sup>102</sup> Running in *BibDesk*'s script menu  the AppleScript "Show In LiteratureMY" (Ctrl-H) tells you that.



Note, a cite-key main key (*cite key*) has automatically been assigned<sup>103</sup> and the red cite-key symbol , which indicated a missing main key, is gone. You can now also access the ISI WOS web site clicking onto the  light thumbnail in the pane to the right side of the window and using there the button

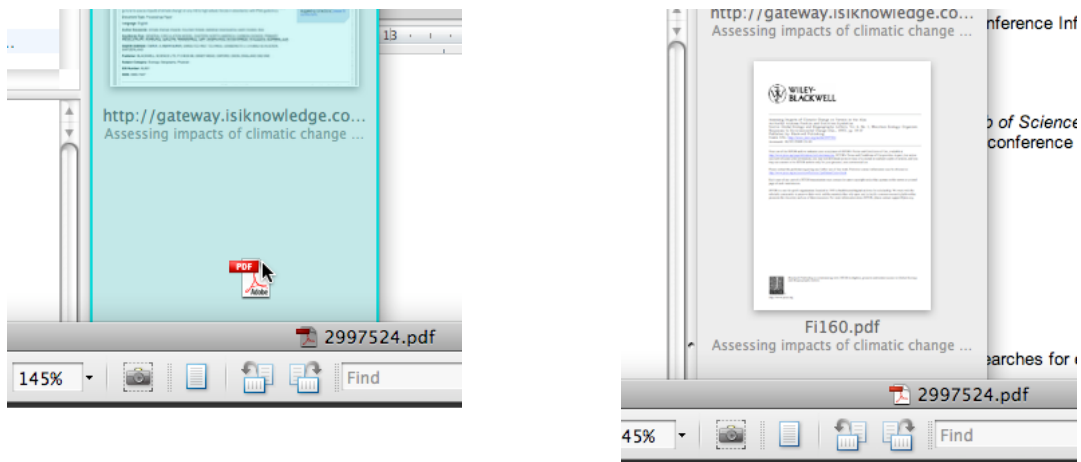


It gets you to the JSTOR repository of the paper

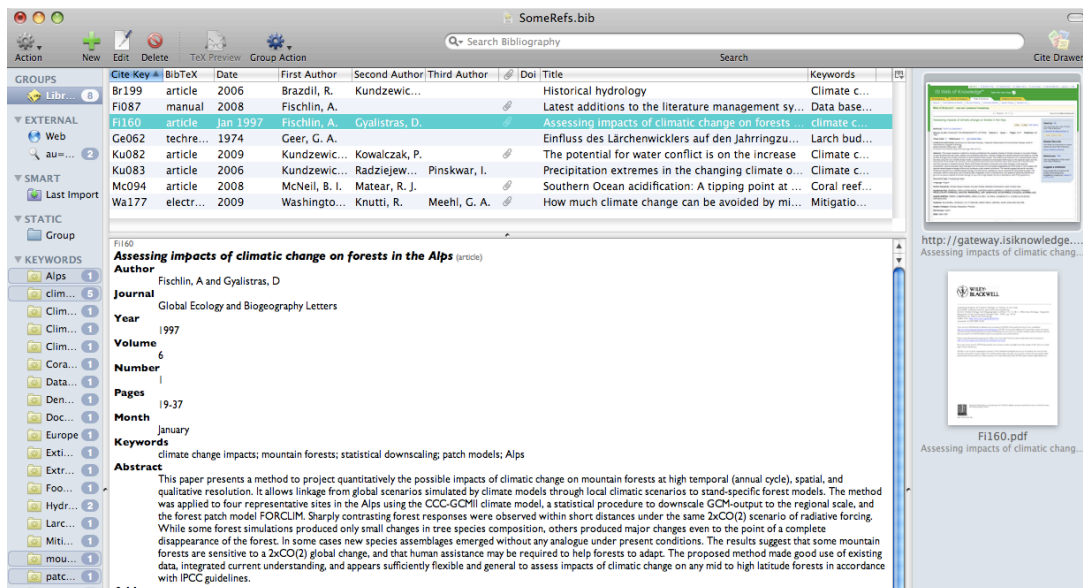


<sup>103</sup> You may easily create a new main key by simply choosing menu command “Publication -> Generate Cite Key” (Cmd-K). However, you should refrain from wasting codes and refrain from using this command unless this becomes a necessity to avoid conflicting cite keys.

where you can download the pdf. You could download it to any location on your disk, but I recommend to open it in *Adobe Reader* by a control click<sup>104</sup>, once the pdf shows up in the browser window. The advantage of having it opened in *Adobe Reader* is that you can simply drag and drop the pdf from the title bar of the *Reader*'s window to the right side pane of *BibDesk* (next figure, left). This should immediately link the pdf with your record, rename it and move it to the proper location on your disk (assuming you have set the preferences as described above) and a corresponding thumbnail for the pdf should appear in the right side pane of your *BibDesk* document window (next figure, right).

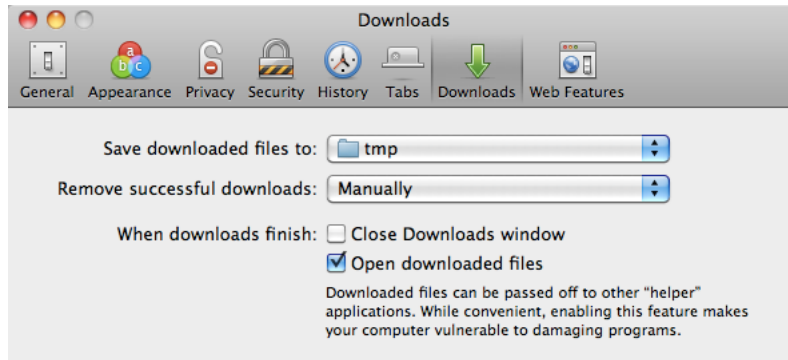


You are now done if your preference settings “File papers automatically” is checked, because the pdf was renamed to ‘Fi160.pdf’ and filed to the wanted location where you keep your pdf’s. Otherwise choose menu command “Publication -> AutoFile Linked Files...” (Cmd-Shift-K) and the file is also renamed and permanently stored at the wanted location. *BibDesk*'s window looks now similar to this:



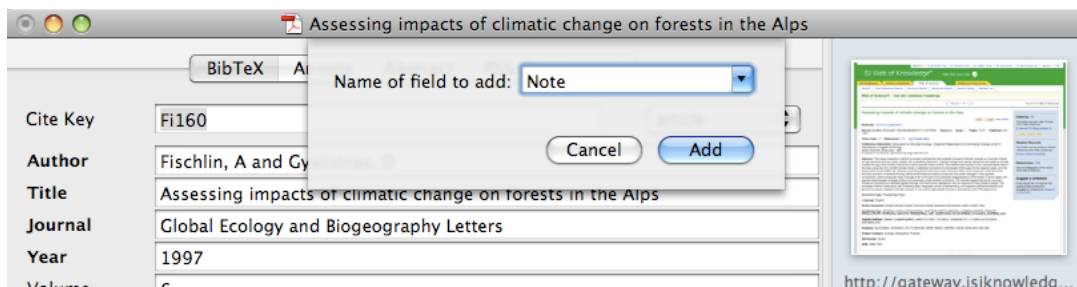
<sup>104</sup> This convenient method is NOT available if you have not prevented the intrusive Adobe Reader plug-in be used in your browsers. I recommend to always turn this feature off, by setting the internet preferences in Adobe Reader (or Acrobat) such that check box “Display PDF in browser using: Adobe ...” is not checked. Then a browser such as safari uses the internal Mac OS X capabilities to display pdf’s, which is more efficient and more convenient than Adobe’s plug-ins.

There is an alternative, very efficient technique available to link pdf's to a record, which is most attractive if your record has a DOI. For this to work I recommend to use the free *Camino* browser as the default browser for *BibDesk*. To accomplish this simply run the AppleScript command *Use Camino*<sup>105</sup> once. Then set the download preferences in the *Camino* browser as this<sup>106</sup>:



From now on it becomes easy to link pdf's to a record: (i) double click the DOI; (ii) open the pdf on the web site; (iii) once the pdf is opened in *Adobe Reader*, switch back to *BibDesk* and execute the script “Link PDF from Adobe Reader”<sup>107</sup> and you are done.

Let's do something more technical within *BibDesk*, i.e. editing the record. First you may wish to add some comments. Hit return or double-click the record to open it for editing. See, the standard *BibTEX* field *note* is missing. Add it by clicking onto the + in the lower left corner and enter the field's name similar to this:



<sup>105</sup> If you followed the recommended installation procedure as described in Section «Customizing BibDesk», notably having run installation script *SE\_BD\_Installer.command*, all needed AppleScript scripts were installed in *BibDesk*'s AppleScript menu. In this context useful keyboard shortcuts are suggested in Section «Recommended shortcuts».

<sup>106</sup> Folder */tmp* is recommended to avoid scatter with downloads that serve only temporal use as an alternative to the default *Downloads* folder. The */tmp* folder is normally not visible in the Finder, but you need it to become visible to configure *Camino* as recommended. There are two simple techniques to open the */tmp* folder: In the Terminal application enter command “open */tmp*” or use Finder's menu command “Go -> Go to Folder...” and enter “*/tmp*”. Once open, you can easily choose it when you have *Default Folder* in use. Without *Default Folder* I recommend to create a permanent alias to the */tmp* folder, e.g. in the Downloads Folder, which then can be used in the configuration dialog of *Camino* anytime.

<sup>107</sup> In case you have *PDFKey Pro* (<http://www.pdfkey.com>) on your system and have its command line tools installed as well, the script “Link PDF from Adobe Reader” will even attempt to unlock the pdf on the fly.

And then enter your comments

|                |  |
|----------------|--|
| Isi-Recid      | 101380932  |
| Isi-Ref-Recids | 89165722 89165715 63815079 89165714 82022387 78985896 36176076 |
| Note           | BibDesk offers really great possibilities, doesn't it?         |
| Publisher      | BLACKWELL SCIENCE LTD  |
| Times-Cited    | 15   |
| Type           | Proceedings Paper  |

While we are at it, let's also copy the stable URL provided by JSTOR into the new record, since that URL can not directly be dragged and dropped from the browser to *BibDesk*'s right side pane. We can create another new field, i.e. field *Url* for that in the same manner we have created the standard *BibTEX* field *note*. Then copy-paste the data from JSTOR's web site to your record:

|                |   |
|----------------|---|
| Custom2        | fromBibDesk   |
| Custom3        | oldRefStatus: fromBibDesk   |
| Isi            | A1997XL65100004   |
| Isi-Recid      | 101380932   |
| Isi-Ref-Recids | 89165722 89165715 63815079 89165714   |
| Publisher      | BLACKWELL SCIENCE LTD   |
| Times-Cited    | 15  |
| Type           | Proceedings Paper   |
| Url            | <a href="http://www.jstor.org/stable/2997524">http://www.jstor.org/stable/2997524</a> |

[< Previous Item](#) | [Next Item >](#)

**Bibliographic Info** | **Items Citing this Item**

**Citation**

**Assessing Impacts of Climatic Change on Forests in the Alps**  
 Author(s): Andreas Fischlin and Dimitrios Gyalistras  
 Source: *Global Ecology and Biogeography Letters*, Vol. 6, No. 1, Mou  
 Environmental Change (Jan., 1997), pp. 19-37  
 Published by: [Blackwell Publishing](#)  
 Stable URL: <http://www.jstor.org/stable/2997524>

**Abstract**

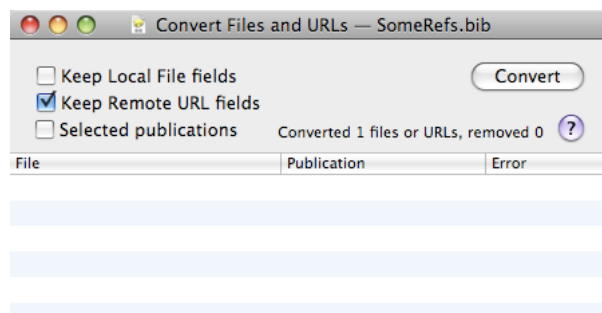
This paper presents a method to project quantitatively the possible ir  
 forests at high temporal (annual cycle), spatial, and qualitative resol

Save your data by choosing command "File -> Save" (Cmd-S). Notice the little symbol to the right of the new field *Url*?

|     |   |
|-----|---|
| Url | <a href="http://www.jstor.org/stable/2997524">http://www.jstor.org/stable/2997524</a> |
|-----|---|

It allows you to conveniently jump to this URL. We are done and can close the editing window.

However, the nifty jump button was available only while editing the record! Of course we could add the column *Url* to the standard list view as we have done for the DOI in order to be able to jump to the just added URL. However, there is a better technique available and the field *Url* should be used as little as possible: Choose menu command "Data base -> Convert File and URL Fields" and click on button Convert

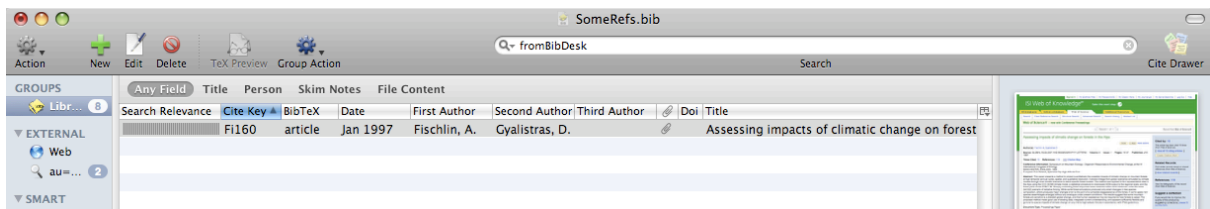


This will let appear the added URL magically in form of an additional thumbnail on the right side pane, which should now look similar to this



This conversion makes the just added URL available for jumping. This conversion is therefore always recommended, in particular before transferring records back to *LiteratureMY*. Note, if you forget to convert, you may risk losing some information, perhaps even links to your pdf's.<sup>108</sup>

Finally, lets transfer the just acquired record back to *LiteratureMY*. How to find newly acquired records in a large bibliography? Simply type “fromBibDesk” into the search field you find at the top right corner of *BibDesk* 's window



and all records that were acquired from within *BibDesk* are shown. Note, each time you generate a new cite key for a record, the phrase “fromBibDesk” is added to a special field *Custom2*:

<sup>108</sup> Note, with the recommended settings (see previous Section «Customizing *BibDesk*») this conversion will also convert and remove any so-called file URLs (starting with `file://localhost...`) stored in a field *Local-Url* and make them also appear on the right side pane. Such local file URLs may have resulted from importing records. However note, this is a one-way avenue, since the exporting of the content of the fields *Local-Url* (as well as *Url*) is no longer supported. *BibDesk* developers plan to deprecate the use of local file URLs and favor the use of aliases instead, which are always shown in the right side pane and are listed under the heading **Local Files**. The advantage being not only that file links are shown in the right side pane, but also that you can even move such files on your disk, yet the links do not break. Similarly for URLs pointing at web sites. Once converted they are listed under heading **Remote URLs** and are also shown on the right side pane. Therefore, remember, it is in general safer to convert File and URL Fields for all records, before transferring records back to *LiteratureMY*! If it doesn't help, it shouldn't hurt either.

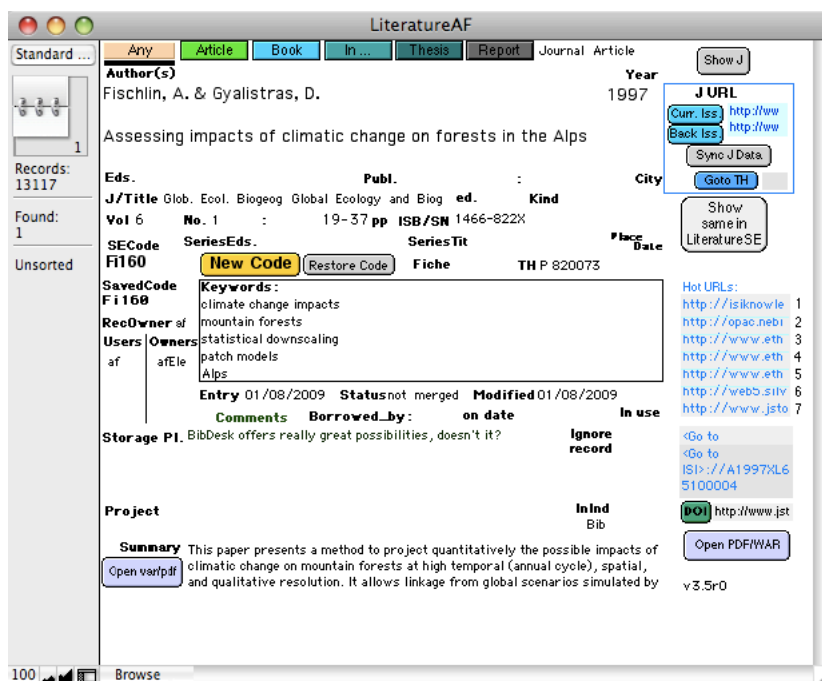
```

Address P O BOX 88, OSNEY MEAD, O
Custom2
fromBibDesk
Date-Added 2009-07-31 03:09:41 +0200

```

This marking of records is of a temporary nature and allows you always to find those records, that have not yet been transferred back to *LiteratureMY*. Once you have completed a transfer to *LiteratureMY* and come back with it to *BibDesk*, this mark will be gone.

To actually accomplish the transfer, simply switch to *LiteratureMY* and choose *FileMaker* script «Import from BibDesk». Always ensure that the wanted records are currently selected in *BibDesk* or the entire library will be transferred. The wanted data are first sent to a scratch *EndNote* bibliography (file 'refs.enl' in your *Literature work folder*), which should only quickly appear and then imported into *LiteratureMY* (see also Appendix A2 «Transferring records (Overviews)»). You should now see in *LiteratureMY* something similar to this:



You are done and best is to delete any records from the *BibDesk* file in which they were acquired once the transfer to *LiteratureMY* is completed. It is in general recommended to consider the *BibDesk* file in which you acquire records merely as a scratch working area, reserved for acquiring records. Actual use of records is best done in separate *BibDesk* files, that are dedicated to particular projects such as writing a paper or a thesis. Remember, *BibDesk* files are actually regular *BibTEX* files. Yet, such project specific bibliography files are useful in any case, i.e. regardless whether you write with *LaTEX* or Word (given you performed also the optional customizations relevant for temporary *EndNote* citations, see above Section «Customizing BibDesk»).

Some final comments on caveats with URLs: *LiteratureMY* maintains only a single entry in the field *URL* and through the transfer only one entry survives in that field. This is the one with the highest relevance, typically the one shown at the top of the right side pane of *BibDesk*'s windows. However, this does not mean only one thumbnail survives the transfer. In fact, the transfer is very sophisticated and tries to make good use of all information contained in the right side pane. The following holds:



- Pdf links are maintained and properly transferred<sup>109</sup>
- DOI URLs are discarded after having extracted the DOI and stored it into the field *DOI*<sup>110</sup>
- If no actual DOI is defined for the work, the field *DOI* may also hold an URL of the form “http://...”. Typically this is the URL, which was at the top of *BibDesk*’s right side pane (priorities go from top to bottom).
- Similarly, ISI WOS record numbers are shown as a <Goto ISI> *Link*, given such a link does not conflict with an actual URL that starts with “http://...”.<sup>111</sup>

In above example, entering the permanent JSTOR link into the field *URL* will give that entry priority and that’s also what you see in above example. Should there also have been an actual DOI URL in the right side pane of *BibDesk*’s window, i.e. one starting with “http://dx.doi.org/...”, that URL would be gone. But don’t worry, its actual DOI would have been preserved and properly stored in the field *DOI*.

Data transfers are conservative and in general no data should get lost during transfers. However, there is one notable exception: End of lines within the field *Comments* do not survive. As of this writing, once they arrive in *BibDesk*’s field *note*, all data are wrapped and filled into the field. Incidentally, this is fortunately not the case with the field *abstract*, which preserves paragraph structuring.

If you frequently transfer records back and forth between *BibDesk* and *LiteratureMY* I recommend to define keyboard shortcuts in the *System Preferences* pane *Keyboard & Mouse* for *FileMaker*, following the technique as described in Section «New helper scripts». I use Control-6 (for export) and Control-7 (for import) in analogy to Command-6 (for export to *EndNote*) and Command-7 (for import from *EndNote*) as provided by default for the *FileMaker* transfer scripts in *LiteratureMY*.

### 1.9.3 TRANSFERRING RECORDS INTO AND FROM *BIBDESK*


Transfers of records are possible among all three main components of our system, i.e. *LiteratureMY* (*FileMaker*), *EndNoteMY* (*EndNote*), and *BibTEX* (*BibDesk*). The transfer of records between *LiteratureMY* and *BibDesk* is described at the end of the Section «Using *BibDesk* - a short tutorial». This covers even the transfer of records from *BibDesk* to *EndNote*, since the transfer from *BibDesk* to *LiteratureMY* takes place via *EndNote*. The only missing transfer not yet covered is that from *EndNote* to *BibDesk*. This transfer is also possible, albeit some restrictions may apply (see also Appendix «A3 Transferring records among applications – possibilities and restrictions»). To accomplish this transfer, simply select the records in *EndNote*, choose as output style the provided style *~BibTeX Export* and choose menu command “Edit -> Copy Formatted” (Cmd-K). Then paste the clipboard into any *BibDesk* data base. In case of difficulties, please consult Appendix «A3 Transferring records among applications – possibilities and restrictions».

<sup>109</sup> *LiteratureMY* may actually ask you to specify the folder where you keep your pdf’s before initiating a transfer to ensure that this information is always also properly transferred.

<sup>110</sup> This works also for URLs that have the DOI hidden somewhere in them, given the keyword ‘KeyUT=’ could be found in an URL that starts with “http://gateway.isiknowledge.com/...”

<sup>111</sup> unless that URL should be redundant (e.g. with the one stored in field *DOI*) then the <Goto ISI> *Link* will be favored.

#### 1.9.4 APPLESCRIPTS OFFERED IN *BIBDESK*'S SCRIPT MENU

The following AppleScripts are made available in *BibDesk*'s script menu  (for shortcuts for these AppleScripts see above Section «Recommended shortcuts»):

|                          |   |
|--------------------------|---|
| “Cleanup Duplicates”     | Any publications imported newly into <i>BibDesk</i> are kept and their outdated duplicates by cite key deleted. This assumes the reimport served an update (see also “Select Obsolete Duplicates”).   |
| “Cleanup PDF Repository” | Any pdf's at the root level of your pdf repository folder are stowed away to their proper locations, i.e. the subfolders corresponding to the first letter of the file names (same functionality as <i>Folder Action</i> script “Do Autofile”).   |
| “Delete Abstract”        | Delete for currently selected publications the abstract. This optional script <sup>112</sup> is mostly of interest in conjunction with a shortcut and when you need to replace frequently abstracts with new ones from the clipboard, i.e. when you wish to make space before calling the companion script “Fix-Paste Abstract”.  |
| “Delete Publication”     | Delete the currently selected publication(s). This script is of interest if you wish to delete an erroneously imported publication, e.g. it was imported twice or got during importing a wrong cite key, or you have otherwise already assigned a final cite key, which you wish to make usable again. Then it is recommended to select those unwanted publications and execute this script, which is the better technique than to delete merely the publication using <i>BibDesk</i> 's delete function. Using this script avoids the cite key being falsely remembered as already used. |
| “Dump CodesMY”           | Get the latest codes from <i>LiteratureMY</i> for creation of cite keys avoiding conflicts (generates a new auxiliary file <i>DumpOfCodesMY.txt</i> in your Literature work folder).  |
| “Export to EndNote”      | Export selected publications to <i>EndNote</i> (via XML format) into bibliography file <i>refs.enl</i> residing in your Literature work folder.   |
| “Extract Bibliography”   | Extract selected publications together with copies of their linked files to some choosable target folder. This script creates a html page at the root of the target folder. That web page contains abstracts, active DOI and URL links, and links to the copied pdf's for independent reading or publication on the   |

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<sup>112</sup> Optional means the installer script *SE\_BD\_Installer.command* quietly skips installation if the script is not present.



web, e.g. for colleagues when writing a paper. This technique allows also to create archives that can be burnt onto DVD's. Such an archive can be read independently from *BibDesk* or any other component of the *LiteratureMY* system and needs only a browser.

Note: By default the name *index.html* and the default title *Bibliography* are used. The optional file *MakeFileIndex.DTF* can be used to override this behavior and to specify the name<sup>113</sup> of the index file and the title<sup>114</sup> used in the index file. Note also that *MakeFileIndex.DTF* can be used easily to override other parameters<sup>115</sup> of the extraction process as done by this *AppleScript*<sup>116</sup>. To customize the appearance of the index file, e.g. colors or fonts, use the CSS style sheet.<sup>117</sup>

### “Extract For e-Reading”

Similar to “Extract Bibliography” but uses always a fixed destination folder, which is reserved for reading of pdf's with an *iPad*, *iPhone* or *iPod Touch* etc. The idea is to dedicate a particular folder, the *e-Reading folder*<sup>118</sup>, which is then typically synced via the cloud, e.g. by using a *DropBox*<sup>119</sup> or *SugarSync*<sup>120</sup> folder that is easily synced with an external device. I regularly run this script to extract the pdf's I want to read on the *iPad* and sync my *iPad* to this folder using *GoodReader*<sup>121</sup>. On the *iPad* I launch *GoodReader*, run a sync, open the index file and then jump to whatever pdf I want to read. The App *GoodReader* for the *iPad* is not only an excellent pdf reader and annotation tool, but offers also very reliable syncing. Thanks to *GoodReader* I can conveniently sync pdf's back and forth between the *iPad* and my Mac while retaining annotations in pdf's (see script “Sync Back From e-Reading”).

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<sup>113</sup> See value definition *FileListFile*. Editing only this file supports the use of another file name for the index file without having to change the code of any of the involved *AppleScripts*.

<sup>114</sup> See value definition *TitleAddon*. Editing only this file supports a variable title as used in the index file without having to change the code of any of the involved *AppleScripts*.

<sup>115</sup> See shell script *SEHtmlExportPostProcessing.sh* for details

<sup>116</sup> Note all this assumes you have customized *BibDesk* as described under the optional step “Extend your Template Files preferences in *BibDesk*”. See also further details on this behavior as explained there.

<sup>117</sup> See file *SEHtmlExportStyleSheet.css*

<sup>118</sup> The location of the *e-Reading folder* is either given by the preference property *eReadingFolder* within the script itself or if that location is not found on your system, as defined by shell variable *eREADINGDIR* that is exported by file *~/bin/LITMYPATH.txt* (provided with distribution of package *EndNote SE Add Ons...*, see also footnote <sup>1</sup> near footnote 30).

<sup>119</sup> <http://www.dropbox.com/>

<sup>120</sup> <https://www.sugarsync.com/>

<sup>121</sup> <http://www.goodreader.net/goodreader.html>

Note: If you select first a group, say SMART<sup>122</sup> or STATIC group or some field group from KEYWORDS and then select also all visible publications, the index file and its title are named after the group's name<sup>123</sup>. Ex.: Selecting a static group named *Biodiversity* and all its publications will result in an index file named *\_\_Biodiversity.html*<sup>124</sup> with title *Biodiversity*. Note for this AppleScript that the default alphabetical sorting of publications by cite key can be suppressed for some groups. List the names of such groups in the *AppleScript*'s property *doNotSortForGroups*.<sup>125</sup> Otherwise the very same rules apply for the index file generation, notably with respect to the optional file *MakeFileIndex.DTF* or the CSS style sheet, as described for *AppleScript* "Extract Bibliography".

### "Sync Back From e-Reading"

The companion script to "Extract For e-Reading" that synchronizes back to your Mac pdf's that you may have annotated on an *iPad*, *iPhone* or *iPod Touch* etc. Say you have synchronized your annotations made on the *iPad* with the cloud, e.g. by using *GoodReader*'s sync command (as described for script "Extract For e-Reading"). Then those annotations are in the cloud and your *e-Reading folder*, but not yet in your pdf repository folder<sup>126</sup> as used by *BibDesk*. Use this script to fully synchronize back your annotations.

Note, this script syncs back only the pdf's of those publications that you have currently selected in *BibDesk*. To really sync back all pdf's currently contained in your e-Reading folder you need therefore first to run script "Select e-Reading Publications".

Note also, this script overwrites any pdf in your repository folder that is older than the one from the e-Reading folder. This is necessary for technical reasons and avoids a mess with the Mac's file system that tends to retain aliases or symbolic links

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<sup>122</sup> See sections in left pane of *BibDesk* named in this manner

<sup>123</sup> You can also select several groups. In this case only the names of the first two groups are actually used.

<sup>124</sup> Names are prefixed by '\_' as defined within the *AppleScript* (property *theIndexFNPrefix*, which can be set to the empty string if you prefer no prefixes). This facilitates to see index files before and separate from pdf folders in the e-Reading folder and/or the *iPad*.

<sup>125</sup> I specify the property *doNotSortForGroups* e.g. as follows: {"To Read", "IPCC TAR", "IPCC AR"}. Any groups containing these strings will then be exempted from sorting by cite key and the index file shows the publications in the order the group is currently sorted. Ex.: Groups "IPCC TAR", "IPCC AR4", and "IPCC AR5" are then always exempted and can be sorted by SPM, TS, chapters, and appendices before running this script.

<sup>126</sup> The pdf repository used is precisely the folder as set by *BibDesk*'s preferences only when using the *BibDesk* scripts "Extract Bibliography", "Extract For e-Reading", "Sync Back From e-Reading", "Select e-Reading Publications", "Extract Index-Abstracts", and "Fix PDF and URL Links". Thus make sure configuration information from file *LITMYPath.txt* is consistent with *BibDesk*'s preference. Only scripts "Cleanup PDF Repository" (or the "Did\_autofile (BibDesk hook)" and "Do Autofile (Folder Action)", respectively) can also use source file *LITMYPath.txt* and may warn you if the *BibDesk*'s preference settings are inconsistent with what is defined by shell variables *MYPDFDIR1* or *MYPDFDIR2* that are exported by file *~/bin/LITMYPath.txt* (provided with distribution of package *EndNote SE Add Ons...*, see also footnote 1 near footnote 30).

to trashed files. Therefore, **IMPORTANT Note: Always annotate pdf's either only on the Mac or your e-Reader, but not simultaneously on both, or you risk loosing some of your annotations!** A good rule of thumb is also to always sync to the cloud on say your *iPad* after having annotated any pdf's there and to sync back using this script before start doing any annotations on your Mac. Note, the latter rule of thumb is of course only working well if your Mac is automatically synced to the cloud. This is the case with *DropBox* or *MobileMe* services, but requires of course your Mac to have a working connection to the internet, or the cloud fails to automatically sync to your *e-Reading folder* that resides on your Mac.

- “Fix DOI and Case In Title, Author” Some data base providers define redundantly the DOI in form of an extra URL, some list authors or entire titles with capitals. This script contains several algorithms to cleanup such messy or malformed records.
- “Fix PDF and URL Links” If any file links on the right side pane have been lost or some URLs are disfunctional because of incomplete definition (e.g. [www.sysecol.ethz.ch](http://www.sysecol.ethz.ch) is converted to <http://www.sysecol.ethz.ch>), this recreates or fixes them. File links are restored from the actual pdf's present in your pdf repository folder given they are named properly, i.e. <cite key>.pdf, <cite key>\_S.pdf, <cite key>\_S2.pdf etc.
- “Fix Zeroes In Cite Key” Script not generally available. This can be used to insert zeroes into cite keys as necessary according to cite key uses in *LiteratureMY*. A maintenance script useful if records with cite keys Fi98, Fi99, Fi100 are assigned cite keys Fi098, Fi099, Fi100 for better sorting (see FileMaker script “Insert 0's in main key (SECode)” of *LiteratureMY*).
- “Fix-Paste Abstract” More and more these days abstracts are provided in UTF-8 encoding. This script converts for the currently selected publications the abstract from UTF-8 to Western (Mac OS Roman) encoding. This overcomes the difficulty of not being able any more to save in BibDesk the current document<sup>127</sup>. Moreover, use this script to enter from the clipboard the abstract if you have currently only a single publication without an abstract selected. To actually replace an existing abstract with a new one from the

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<sup>127</sup> This is relevant only in the recommended preference settings “Open and export BibTeX files using encoding” set to “Western (Mac OS Roman)”

- clipboard, call first the companion script “Delete Abstract”. This script is designed such that the encoding conversion can be easily changed to something else, depending your current BibDesk preference settings (“Files -> String Encoding”).
- “How many selected” Use this script to learn how many publications are currently selected. Since BibDesk as of this writing<sup>128</sup> does not display how many publications are currently selected, this script is useful when you currently have a large and complex selection, yet need to be sure how many publications are actually selected. Typically this script comes in handy when the selection is the result of another script.
- “Import by DOI” Use this script if you know the DOI of a publication and wish to import it into *BibDesk*.
- “Inspect Linked Files” Use this script to learn about type (e.g. symbolic link vs. alias vs. actual file) and to which files the actual file links go (see also “Fix PDF and URL Links” and “Cleanup PDF Repository”).
- “Link PDF from Adobe Reader” Link the frontmost pdf currently opened in *Adobe Reader* to the currently selected publication (unlock if secured and *PDFKey Pro*’s command line tools are installed).
- “Make PDF Alias” Creates an alias to a pdf residing in a non-standard location as a portable symbolic link. For instance keeping chapters of an entire book within a subfolder named according to the cite key of the record for the entire book, allows nevertheless to have for each individual chapter its own <cite key>.pdf file at the proper location without having to store the pdf redundantly. This saves space and supports easier maintenance, e.g. if pdf’s are made searchable via *Acrobat*’s OCR feature. Symbolic links are also preferable when synchronizing the pdf repository among several Macs and for archiving.
- “S-F-X Linking” If enough information is contained in the publication record of a journal article, jump to the proper web page (access restricted and requires well defined fields *ISSN*, *Year*, *Volume* and *Pages*).
- “Search By Title In Clipboard” Similar to its companion script “Show In LiteratureMY” this script helps you to search for the presence of a record either in *LiteratureMY* or in any currently open *BibDesk* documents. However, this script searches for all records with a title that contains the current content of the clipboard not

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<sup>128</sup> Version 1.6.5 (3713)

only in *LiteratureMY* but also in all currently open *BibDesk* documents. Therefore this script is typically used to get a complete overview over all records containing a particular title phrase not only in *LiteratureMY* but also in all currently open *BibDesk* documents. This script is also useful before deciding to import a record into *BibDesk* and helps you to avoid redundancies in your literature data base. This script informs you what it could find or failed to find via an audio message and selects any found record(s).

In contrast to its companion script “Show In LiteratureMY” this script uses any text currently contained in the clipboard as the title (or part of the title) to search for a publication, which means it needs no publication to be currently selected and ignores cite keys. Since this script informs you regardless of any current selection in *BibDesk*, it informs you about all records found in the system, including any currently possibly selected ones. This script can assist you when merging entire data bases, e.g. when merging records from multiple *BibDesk* documents in a single one.

- “Select e-Reading Publications” Select in the current *BibDesk* document all publications that have a pdf in the *e-Reading folder* (see script “Extract For e-Reading”). This script allows for checking the consistency between your *BibDesk* documents and the pdf’s actually contained in the *e-Reading folder*. Since you can easily add pdf’s to the *e-Reading folder* on an iPad, e.g. by downloading pdf’s, inconsistencies between the *e-Reading folder* and your *BibDesk* data may arise quickly. Within *BibDesk* you may have a static group for pdf’s to be read or a smart group looking at the ‘Read’ field. This script is a great help in finding out about possible inconsistencies between such a group and the *e-Reading folder*. Note, this script logs all unmatched cite keys (for name of log see preference property *theUnmatchedCiteKeys*). Inspect this log using Apple’s utility *Console*, e.g. for subsequent manual fixing of the inconsistencies.
- “Select Obsolete Duplicates” Selects the older publications of duplicates by cite key (see also “Delete Duplicates”, which does more, i.e. it deletes the publications which would have been selected by this script).
- “Select Top Publication” Useful only if a shortcut, say Ctrl-A, is associated with this script. This is a quick way to select the publication listed at the top in the current *BibDesk* document without having to use the mouse. This

|                          |   |
|--------------------------|---|
|                          | comes handy when you wish to link a pdf to a just imported publication and perhaps many more uses.  |
| “Show In LiteratureMY”   | Checks whether the currently selected publications are already contained in <i>LiteratureMY</i> and shows them there as the current find. This script is most useful before deciding to import a record into <i>BibDesk</i> or to quickly find the counterparts in <i>LiteratureMY</i> . This script informs you what it could find or failed to find via an audio message and selects any found record(s).<br>Note the script searches by title if no cite key has yet been assigned to the record and thus may miss finding a misspelled record in <i>LiteratureMY</i> . Note also, once you have already imported the record and assigned a cite key, this script will not find redundancies in <i>LiteratureMY</i> anymore. This script can also help you assigning a cite key and transferring additional data from <i>LiteratureMY</i> to your currently selected publications in case of a match, assisting the merging of entire data bases. The latter is done only after asking you for permission on an individual basis, i.e. record by record basis.<br>Note this script has a companion script, i.e. “Search By Title In Clipboard”, with a similar functionality, yet with subtle differences. The companion script “Search By Title In Clipboard” always searches only for matching titles and needs to have the string to search for in the clipboard regardless of the current selection in <i>BibDesk</i> . “Search By Title In Clipboard” also searches in in all currently open <i>BibDesk</i> documents, which may be particularly useful when you have several <i>BibDesk</i> documents open at the same time. Again this can assist you when merging entire data bases. |
| “Update BibDesk”         | Gets the latest nightly build of <i>BibDesk</i> and installs it.  |
| “Use Camino”             | The default browser used by <i>BibDesk</i> is <i>Camino</i> .   |
| “Use Default Browser”    | The default browser used by <i>BibDesk</i> is the system wide default browser, typically <i>Safari</i> or whatever your system’s configuration may be.  |
| “WOKSearch Availability” | This script informs you about the availability of the <i>WOKSearch Premium</i> service <sup>129</sup> as offered by Thomson Reuters at your current location/institution and as used by the standard <i>BibDesk</i> menu  |

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<sup>129</sup> The ISI Web of Knowledge Web Services, version 2.0, are needed here. Find details on these services here: <http://search.isiknowledge.com/esti/cxf-wsclient-demo/docs/soap/index.html>

command "Searches -> Web Of Science SCI".

Since 31<sup>st</sup> August 2012 Thomson Reuters has split previous IP# authenticated searches of its data bases into a *WOKSearchLite* and a *WOKSearch Premium* service (the latter simply named *WOKSearch*). Not all these services may be available to you and notably the *WOKSearch* service may be offered only in a reduced form, i.e. in a throttled down manner that allows only access by a certain number of queries, say 5, in any given query period, say 5 minutes. Use this script to learn if at all and notably by when such a service becomes again available to you.

If the service has exhausted its limits this script can be called within the exhausted query period as many times you like without risking any penalty. Otherwise you have wasted one query. Thus avoid calling this script more than really needed.

For this script to work you need to have the auxiliary perl script 'woksearch.pl' stored in the same folder as this Script and installer script 'SE\_BD\_Installer.command' has been run successfully to make that perl script known to your system.

## 2. Maintenance

### 2.1. Avoiding redundancy

Unless you search each time before entering a new record in a disciplined manner whether a publication is already contained in our system, your data base *LiteratureMY* may contain redundant entries. Remember the scripts "*Find in field Author(s) in all data bases*" (Cmd-8) and "*Find in field Author(s), Year, Title in all data bases*" (Cmd-9) support you in searching for already existing records. To discard redundant records, you need first to be able to find them. The new script "*Find similar/redundant*" supports you in accomplishing this. It offers to be run in two modes:

- *Redundant* - This script searches for any records of journal articles, which have the same authors, title, year, volume and page numbers.<sup>130</sup> Such records are generally redundant.
- *Similar* - This script searches for records with a similar title regardless of information contained in the other fields. Since *FileMaker* has only a limited capability to detect similarities<sup>131</sup>, the found records may or may not be redundant. Thus, you have to decide.

To make the use of the script "*Find similar/redundant*" in mode *Similar* more convenient for you, you may mark records with value "*SimilarOK*"<sup>132</sup> in field *InInd*<sup>133</sup> if that record is actually not redundant. Any records such marked can then be omitted the next time you use this script again. This way you don't have to inspect and decide all over again whether similar records are actually redundant or not.

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<sup>130</sup>Note, however, it won't find redundant, but incomplete records or records with typing errors. E.g. if you entered for the same article only incomplete information by omitting page numbers or misspelled something, those record won't be found. Punctuation marks and blanks, however, are of no relevance. Thus, two records having unequal number of blanks between words of a title are found to be redundant; but two records having a difference in one word, e.g. because you mistyped once a name, they are not found to be redundant.

<sup>131</sup>As of *FileMaker Pro* v6.04 only up to the first 20 characters per word and only up to a total of 60 characters are considered in any comparison while searching for duplicates. It is currently not known whether this restriction still applies for later versions of *FileMaker*.


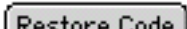
<sup>132</sup>This value is interpreted to mean also that the record is not in the card index, i.e. value "*SimilarOk*" is to be interpreted to imply also value "*n*". Notes, the values "y" and "n" are there only for legacy reasons and since any contemporary record was entered from other sources than the legacy card index, the value "n" is implicitly implied unless a "y" is present in this field. Note, the field *InInd* may now also hold additional information about where the record was acquired, i.e. whether its main key (*SECode*) was issued while the record was in *LiteratureMY* (*FileMaker*) or in a *BibDesk* managed *BibTEX* bibliography. Any record initially acquired using *BibDesk* may contain here also the value "*BibDeskEntered*" in addition to "*SimilarOk*". However, the information on the source of a record is only of limited relevance, while the marking with "*SimilarOk*" may facilitate the searching for redundancies in large bibliographies significantly. Thus ensure this information is preserved while editing field *InInd*.

<sup>133</sup> This field is labeled *InInd* but is actually internally the field named *InCrdIndex*.



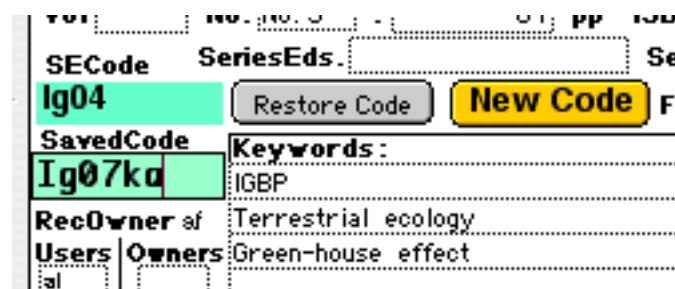
You should permanently delete extra records referencing the same publication till you have only one left. Remember, **always** use script "*Delete record permanently*" to delete such extra records!

## 2.2. Changing the Main Key *SECode*

While consolidating a data base *LiteratureMY*, it may become necessary to change the main key (*SECode*<sup>134</sup>) of a record, despite rule 7 as stated on p. 26 of FISCHLIN & NEMECEK (2001). This may become necessary to get rid of wrongly catalogued records, which then become duplicates. To this end use the following helpful buttons:  

The button *New Code* is typically used after having duplicated a record with script *Duplicate record* (see Section «New Helper Scripts»).

The button *Restore Code* is normally used to restore an accidentally changed main key, e.g. after editing the authors and accepting the changed key despite the warnings. However, button *Restore Code* can do more than just that. It is particularly powerful if used in the layout *Maintainers Layout*. There you may enter any main key into the field *SavedCode* and press the button. This way you can force any main key onto a record (even change the owner, see also below)! E.g. enter any new key into the field *SavedCode* in the *Maintainer's Layout*



The screenshot shows a database record form with the following fields and values:


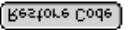
|              |                     |    |
|--------------|---------------------|----|
| SECode       | SeriesEds.          | Se |
| Ig04         |                     | F  |
| SavedCode    | Keywords:           |    |
| Ig07ka       | IGBP                |    |
| RecOwner of  | Terrestrial ecology |    |
| Users Owners | Green-house effect  |    |

and press button *Restore Code*, the result will be a key exactly as you have entered it in field *SavedCode*<sup>135</sup>.

Since changing the main key threatens in general the integrity of the literature data base system, you should make use of these functions only when you are sure the wanted key is correct and while you have access to the internet. The scripts will then make great efforts, the central data bases, notably *LiteratureSE*, will stay consistent with the changes you are making. Note, if there should be a pdf- or war-file available for the record, it will also require renaming. The button's scripts will take care of that automatically<sup>136</sup>. Therefore it is again recommended to have internet access, in case you store your pdf-files on a file server.

<sup>134</sup> This field is labeled *SECode* but is actually internally the field named *SysEcolCode*.

<sup>135</sup> You have to dismiss all warnings and insist on continuing with the script to force this result!

<sup>136</sup> Watch out whether the script informs you about having renamed pdf- or war-files if you use the buttons   the first time. Sometimes the involved AppleScript requires to be activated before it actually executes. If you suspect that it does nothing and requires activation, proceed as follows: Open the FileMaker script «Rename pdf and/or war to new SysEcolCode (internal)» by selecting it and clicking the *Edit...* button. Then select the *Perform AppleScript* step and click the *Specify...* button. Click twice the *OK* button and *Done* button and the script should now work and rename all involved pdf's and report about its accomplishments. Check it out and possibly repeat above steps if necessary.

Remember, there is also the script named *Change Owner to Me*. It is much more convenient than above procedure if your only motivation is only to change the owner. It does change the owner of the current record to you, given the previous owner is no longer active. As a consequence, the main key changes. Again you should follow the rules described above, i.e. use this script only while you have access to the internet. Again, possibly present pdf-files or war-files will be automatically renamed as well. This is all most convenient, preserves the overall integrity of the data base system and is therefore the recommended technique to change the owner.

### 2.3. Using 0 instead of hard blank in the Main Key SECode

Under MacOS X 10.2.x Microsoft's *Internet Explorer* hangs forever and can't open a pdf-file whose name contains a hard blank. This is a nuisance, e.g. while reading your personal pdf collection from the file *index.html*, which was generated by utility *MakeFileIndex*. I have not been able to find a method by which this problem can be overcome. Thus it is advisable to stop using hard blanks in the main key of the records. Instead you should use a digit, i.e. 0. This will allow to sort easily all records in ascending order, both within the *FileMaker* as well as for the electronic reprints such as the pdf-files in the Finder, yet files can easily be handled on basically any operating system<sup>137</sup>.

As of version 1.7 of our literature data base system we use the new method without any hard blanks. This is now the default method and I advise against going back to the old method (albeit this is theoretically still possible<sup>138</sup>). The new method affects any creation of new keys (*SECode*), given you have also discarded/updated your *CodesMY* exactly as described for step 3 in FISCHLIN & NEMECEK (2001) on p. 10 while you have upgraded your personal literature data base.

To fix really all keys which still contain hard blanks, i.e. those from the records entered previously, use the script *Insert 0's in main key (SECode)*. However, it is highly recommended to execute this script only after having done the following:

- Textual backup of your personal data files *LiteratureMY* and *CodesMY* by using the scripts *Archive as TEXT file (MERGE format)*...
- Perform a fully successful upload/merge of your records from *LiteratureMY* (script *Upload/Merge to LiteratureSE*...)
- Make sure you have access to the internet, notably *LiteratureSE* and that your collection of pdf- or war-files is fully accessible as well.

Now it should be safe to run the script *Insert 0's in main key (SECode)*. The result should be an entirely consistent data base without any hard blanks in the records you own. This means all fine (i) in your records within *LiteratureMY*, (ii) in your collection of pdf- and/or war-files, and (iii) in *LiteratureSE* all copies of the merged records you own with master rights. All should now be up to date without any hard blanks but 0 instead.

**Recommendation:** It is advisable to first run script *Insert 0's in main key (SECode)* with only a few records in the current selection. Once you have familiarized yourself with the procedure and all went well, it is safe to run the script also with all your records unless you have thousands of them. However, you should exclude the dummy record at the begin of the data base. It is easy to get this needed selection by executing the script *Find all (except records to be ignored)*. Normally this script is hidden, i.e. not shown in the menu *Scripts*. Execute it after having opened the menu command *Scripts > ScriptMaker*...

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<sup>137</sup>The hard blank (character 202 decimal on a Macintosh, UTF-8 160) is a non-ASCII character and thus platform dependent. Sticking to merely standard ASCII characters is an easy as well as robust method to achieve the same result as with a hard blank.

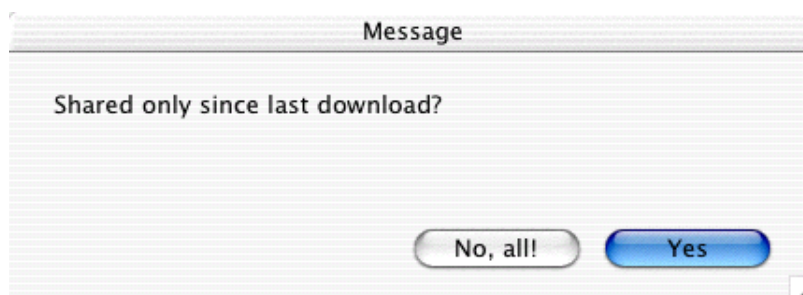
<sup>138</sup>In *Maintainer's layout* you can set the global variable *prefixCodeCh* accordingly.

Once you have translated all main keys in all your records properly, you should immediately upload/merge your *LiteratureMY* once again (script *Upload/Merge to LiteratureSE...*). This will make the transition considerably easier. Note, records which needed no change of the key will remain unaffected by the script *Insert 0's in main key (SECode)*, even when they are within the selection. Thus the upload/merge will involve only records of which the key has actually changed.

Note, any records you merely share and where you have no master rights to modify them, will still contain keys with hard blanks. Thus it is highly recommended to make the transition to the new method in cooperation with all users. Once all users have updated their records, you need simply to discard all records you share (hidden script *Find mine I share (owner is someone else)*) from your *LiteratureMY* and download the ones you share once more. Records you share owned by a former, i.e. no longer active member of Systems Ecology will still contain hard blanks. Use script *Change Owner to Me* to take responsibility for those records. Then the result should be a data base without any hard blanks in the main key (*SECode*) throughout all records. Use script *Download/Extract My Records From LiteratureSE* with options *Shared*



and *No, all!*.



Note you can run the script *Insert 0's in main key (SECode)* also anytime later, e.g. when you wish to add an extra 0 in front of all keys with a number less than 100. This is of course only necessary if you have more than 99 records for a given author abbreviation.

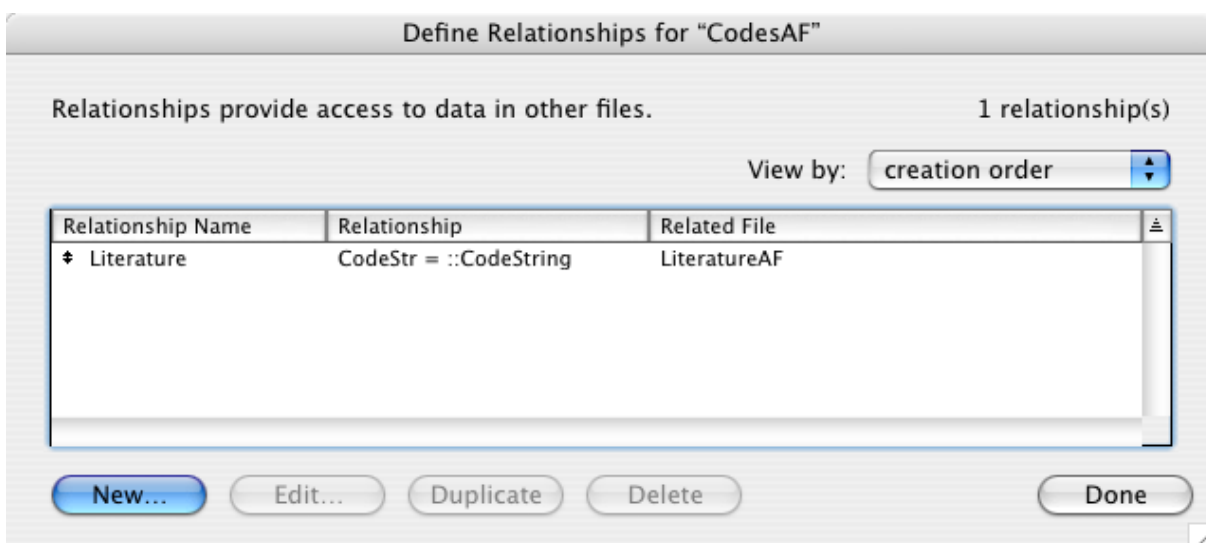
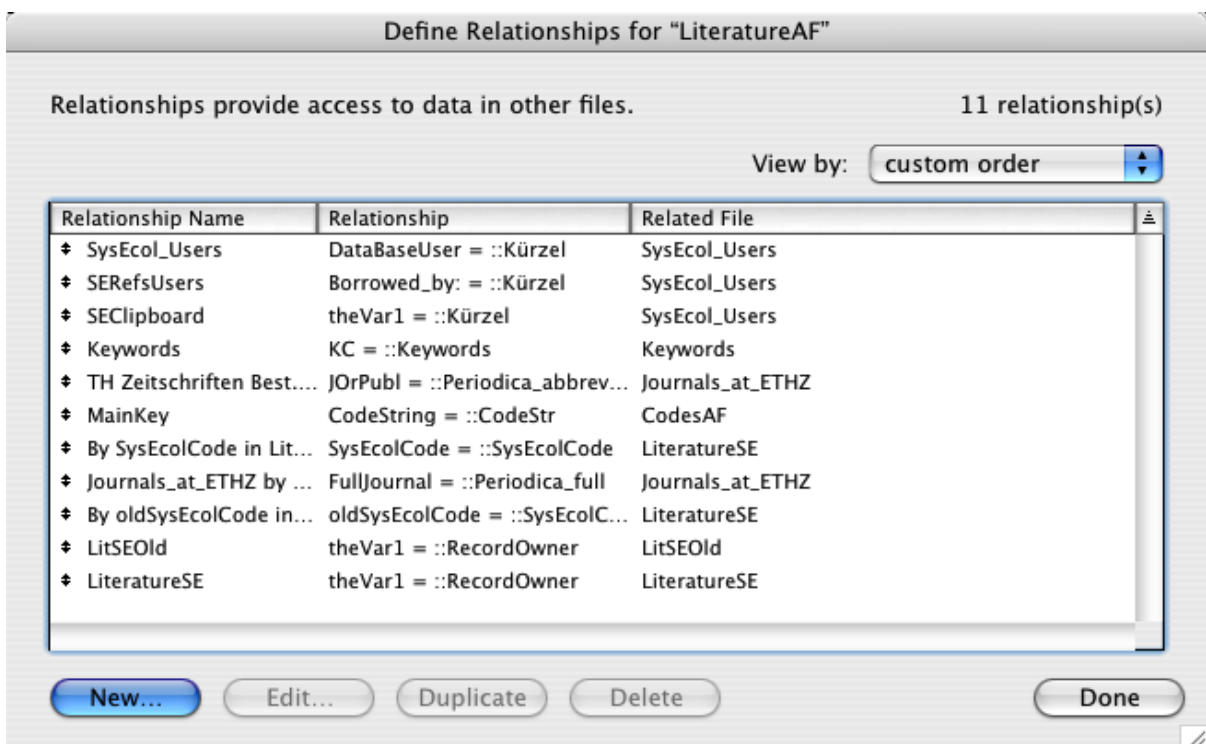


In such a case simply press the button *3 digits* instead of the default *2 digits*.

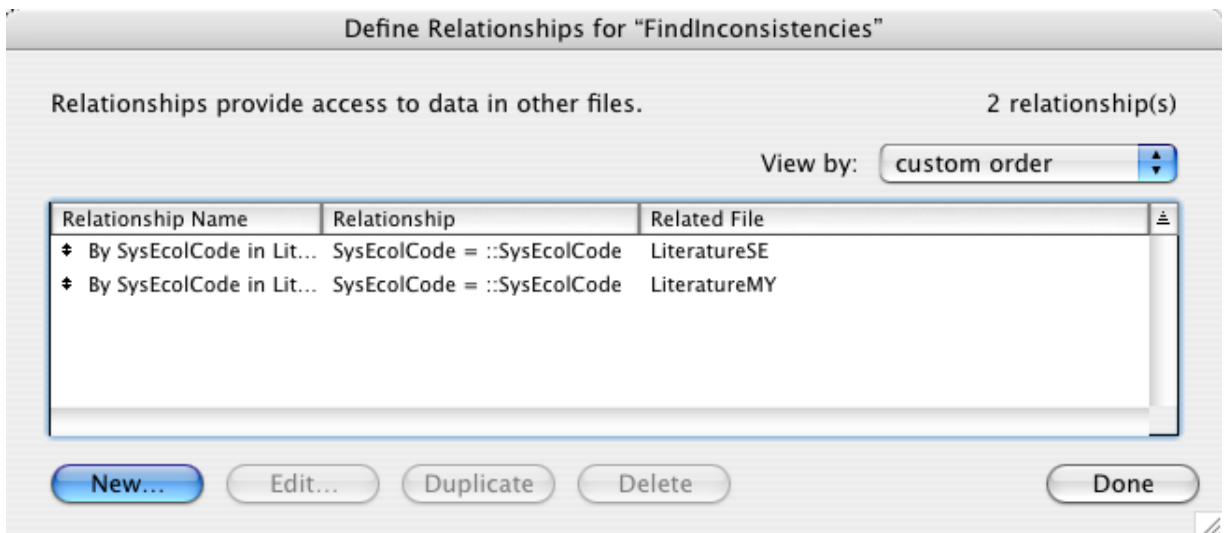
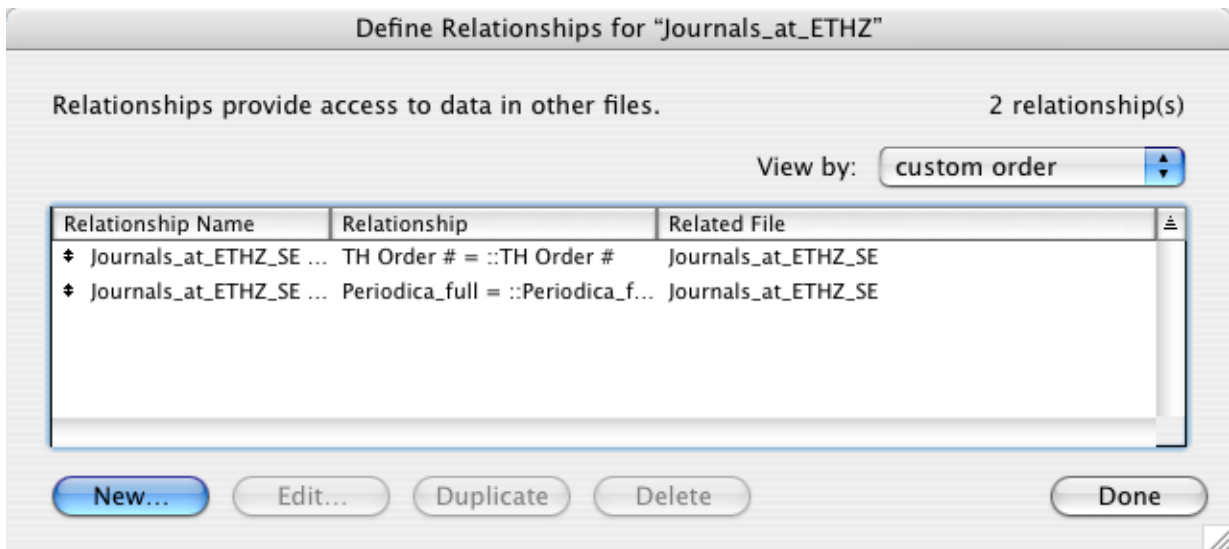
## 2.4. Checking *FileMaker* relationships

The literature data base system ceases to function properly if so-called relationships between various involved files are not properly defined. *FileMaker* can dynamically change and remember these settings, which is sometimes useful and sometimes a nuisance. If you suspect such a problem, you can easily check the current definitions of relationships by using the menu command *Define Relationships....* Note you should do this check only if you are connected to the Internet and know the passwords for the central data base files!

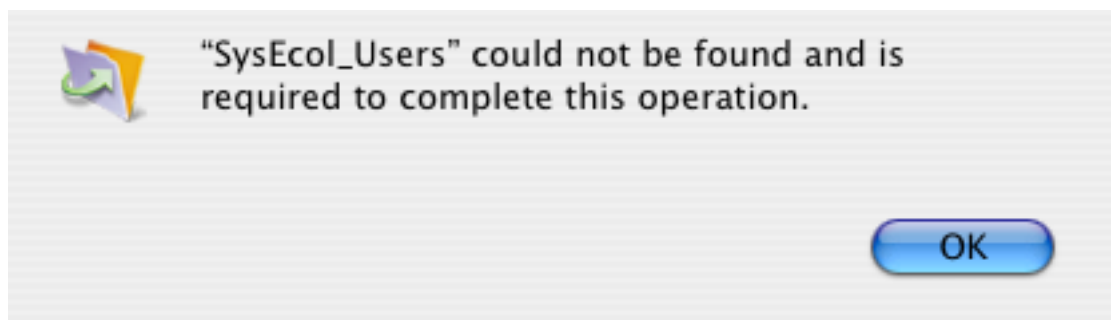
The relationships should look exactly like this in *LiteratureMY* and *CodesMY* (here shown with *MY* as *AF*):



The auxiliary files, which have some relationships, should have them defined like this:



If you encounter an error message similar to this

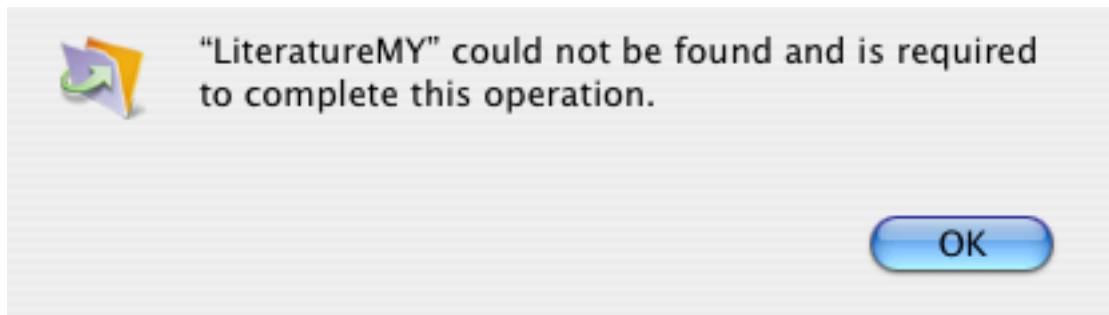


then a relationship may be broken. In such a case it is best to select the needed file and fix this way the broken relationship<sup>139</sup>.

<sup>139</sup>In particular in OS X it is most convenient to switch to the Finder and make the needed file ready, should it actually be missing. Then resume the script.



Don't confound such an actual error condition with the normal establishing of a relationship to your personal files. If you are using for the very first time a feature, which needs to establish a relationship with a personalized data base file, you may encounter a similar error message. E.g. it may be the following message



However, you can easily tell such a message apart from a real error condition. If the missing file is either *LiteratureXY*, *CodesXY*, or *LiteratureMY*, then it is NOT an error condition. The example shown above is normal and needs only to know the name of your *LiteratureMY* data base file. In all these cases you are expected to select once the wanted file. Once selected, your data base system should remember your selection and there is no longer any need to ask you again.

In all cases where you have actually encountered an error condition, you should report<sup>140</sup> this to the maintainers of this data base. Thank you!

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<sup>140</sup>Please write down error message and name of script in which you have encountered this error. Try otherwise to take a note of the state your data base system was in when you launched the script.

## 2.5. Conversion utilities

Under Mac OS X there are now many comand line tools available, which can be quite useful for converting data. With OS X comes the powerful *iconv*. Other utilities, e.g. *utf82mac* or *rtf2txt*, are installed by default if you complement the basic *EndNote* installation with our *EndNote SE Add Ons*.

*iconv* This essential and very powerful conversion utility is at the heart of many conversions done using Mac OS X. It is very complex and its use may not always be very simple, but it is the main conversion workhorse recommended to be used for reliable conversions.

To learn more type in a terminal window of application *Terminal*:

```
man iconv
```

Note, several of our AppleScripts and shell scripts use *iconv*.

*utf82mac* This utility converts *UTF-8* encoded text to *Western Mac OS Roman*. It uses *iconv* to do the actual conversion. To learn more type in a terminal window of application *Terminal*:

```
utf82mac -h
```

Note, this script may be used as a filter with *BibDesk* when opening a *UTF-8* encoded file (menu command "File -> Open Using Filter...") by entering as the *Filter Shell Command*: `~/bin/utf82mac`.

*rtf2txt* This utility converts a rtf file into a mere text file. By default *Mac OS Roman* text encoding results, which used to fit nicely into our system, notably the traditional encoding used by the *FileMaker* data base *LiteratureMY*. However, note this utility is deprecated and is no longer maintained, yet it may be useful for debugging purposes if PPC code can still be executed (up to and including Mac OS X 10.6.8 Snow Leopard).

To learn more type in a terminal window of application *Terminal*:

```
rtf2txt -help
```

or visit

<http://www.bluem.net/de/mac/resterampe/>

*textutil* This Mac OS X utility serves as of this writing as a replacement for utility *rtf2txt* and is used during all transfers from either *EndNote* or *BibDesk* to *FileMaker* data base *LiteratureMY*.

To learn more type in a terminal window of application *Terminal*:

man textutil

Note, several of our AppleScripts and shell scripts use *textutil*.

*deTeXforBD.sh* This utility converts *TEX* encodings to the single *LaTEX* format *BibDesk* accepts and helps further by converting some special characters *BibDesk* cannot “deTeX”, e.g. °C, to the encoding as currently set in *BibDesk*’s preferences. This is particularly useful in case you wish to use some citation export from a website that uses a different *TEX* encoding for special characters than the one *BibDesk* uses. To learn more type in a terminal window of application *Terminal*:

deTeXforBD.sh -h

Note, several of our AppleScripts and shell scripts use the same algorithm as this utility.

*Bibutils* They allow to convert to and from several formats such as *BibTEX* or *EndNote Refer Format* to a central, common format *MODS* or *XML intermediate*, which is the *Library of Congress's Metadata Object Description Schema (MODS)*.

For example the utility *end2xml* could be used to convert file *refs.txt* resulting from an export of *FileMaker* data base *LiteratureMY* to *EndNote* (see also Appendix A2) into a *MODS* formatted file.

To learn more visit

<http://sourceforge.net/p/bibutils/home/Bibutils/>

The following sites are useful to learn more about formats in which bibliography data are and can be stored:

MODS <http://www.loc.gov/standards/mods/>

*BibTEX* <http://nwalsh.com/tex/texhelp/BibTeX.html>  
<http://www.fb10.uni-bremen.de/anglistik/langpro/bibliographies/jacobsen-bibtex.html>  
<http://en.wikipedia.org/wiki/BibTeX>

Refer <http://lucy.ukc.ac.uk/makhzan/refer.html>

<http://web.archive.org/web/20080115060458/>

<http://www.ecst.csuchico.edu/~jacobsd/bib/formats/refer.html>

RIS

[http://www.refman.com/support/risformat\\_intro.asp](http://www.refman.com/support/risformat_intro.asp)

<http://www.adeptscience.co.uk/products/refman/reference>

General

<http://web.archive.org/web/20080115060453/>

<http://www.ecst.csuchico.edu/~jacobsd/bib/formats/index.html>

## 2.6 Importing into *EndNote* the term list *Journals*

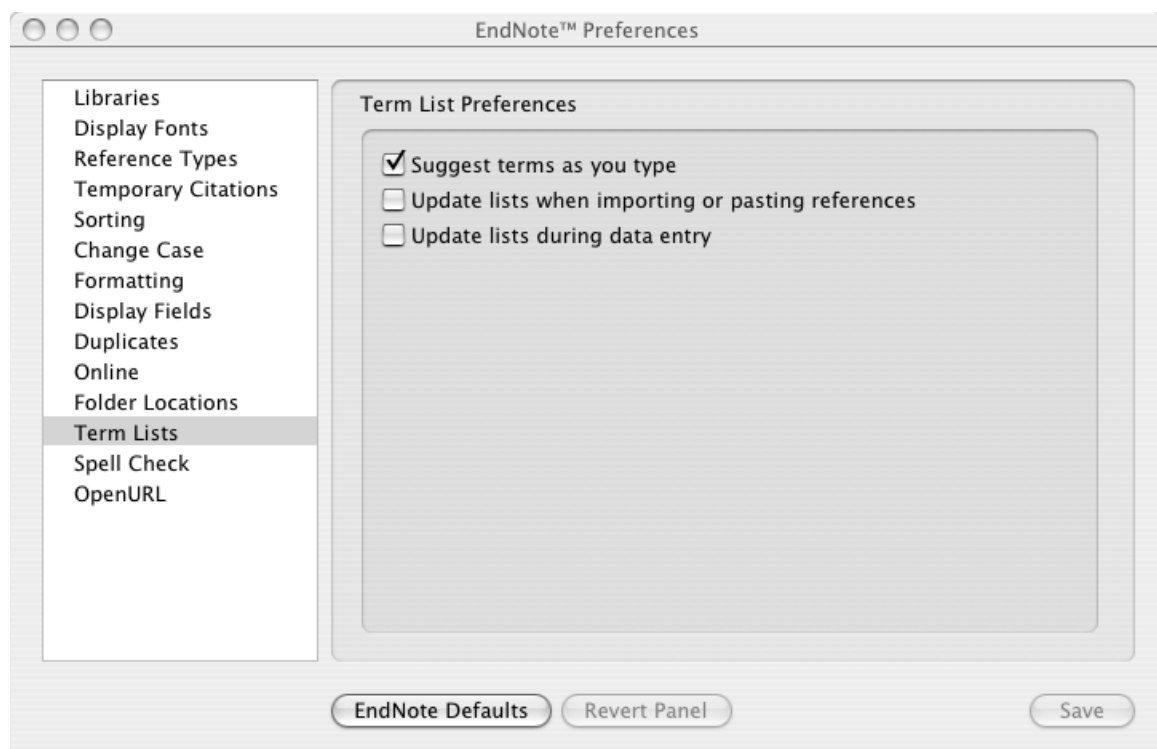
As of *EndNote 8*, importing a term list into *EndNote* has become difficult. This is particularly relevant for importing the journal list as generated by the *FileMaker* auxiliary file *Journals\_at\_ETHZ* (Script «Make EndNote Journals Terms List»). Follow this procedure to succeed:

- 1) Open the Term List in a text editor, e.g. *TextEdit* (recommended)
- 2) Make certain that the last line is blank (a simple carriage return at the end of the last line of actual text)
- 3) Save the file with UTF-8 encoding

Then import the thus prepared file into *EndNote*. Note, that term lists are stored in the accompanying folder *...Data*, not merely in the file *....enl*.

In addition you have to make sure the list gets not corrupted. You need to adjust the settings in your *EndNote* bibliography file. Notably prevent any links affecting this field, i.e. all links by using the menu command "Tools -> Link term Lists...".

Finally you have also to prevent that any importing or pasting of records corrupt your term lists. Set the *EndNote* preferences for *Term Lists* as follows:

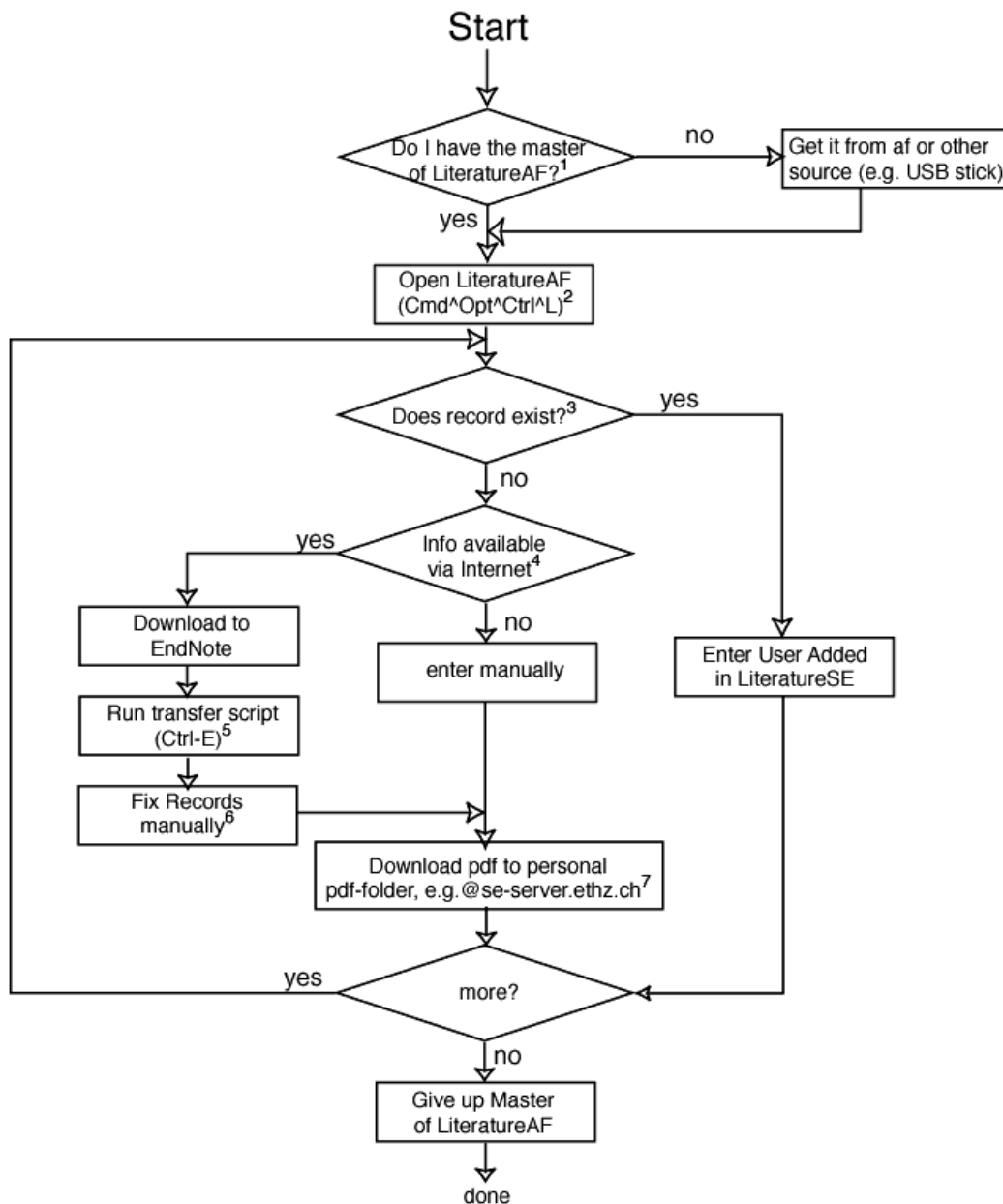


## **Appendix**

The following pages may be particularly helpful if printed and kept handy. For further details on exporting to *EndNote* please consult Section «Exporting to *EndNote* ».

## A1 Acquiring new records (workflow diagrams)

Method 1 using LiteratureMY and EndNote



LiteratureAF is an example for LiteratureXY

1: Optional step

2: QuickKeys (Dragthing) shortcut possibly not available or different

3: Make sure you are connected to the internet, then use either of the two following commands:  
author only (Cmd-8) or author, year, title in any combination (Cmd-9)

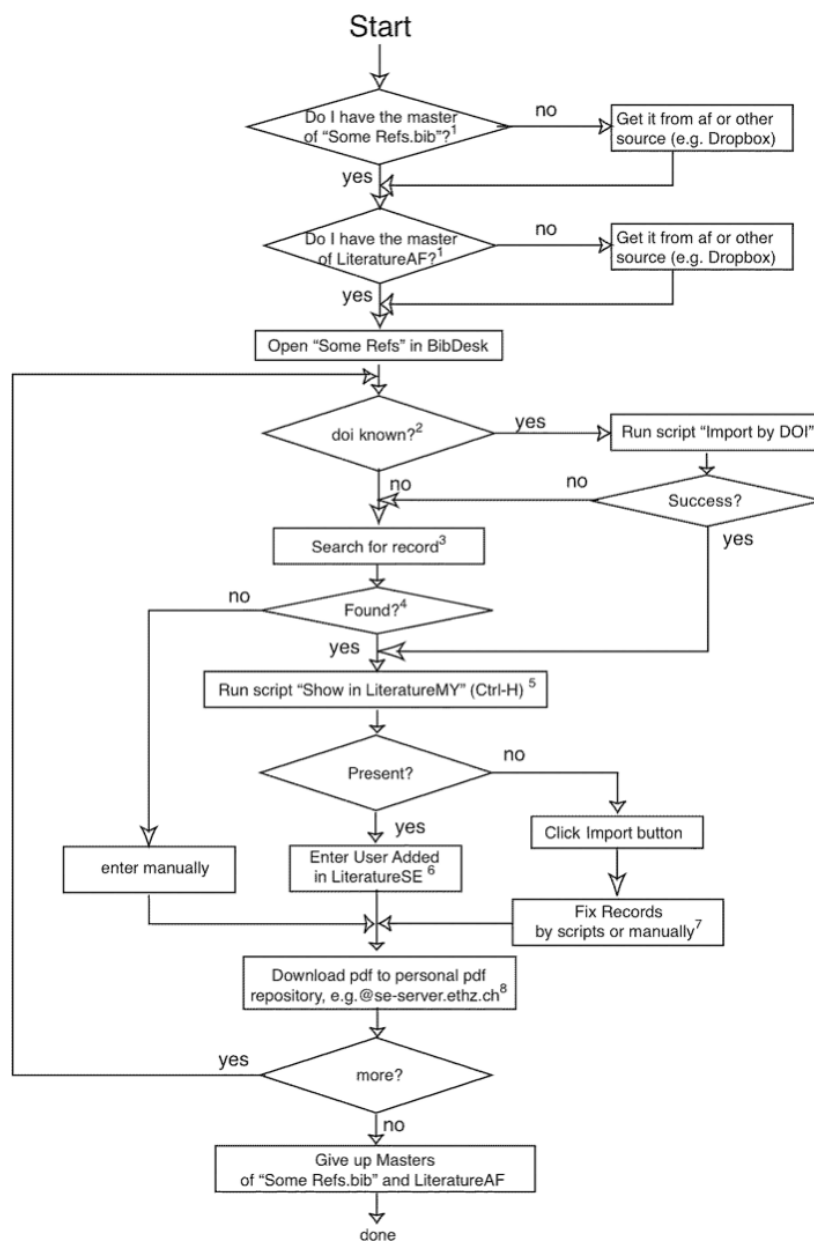
4: If it is a journal article ISI WOS (Web Of Science) or WebSPIRS may list it or the journal you are browsing offers EndNote export (Science, Nature a.o. do). If it is a book NEBIS may list it. In the latter case using EndNote Connect function may do the job.

5: This shortcut is only available via a QuickKeys script which executes a series of steps (EndNote export, Alpha EndNote Menu transfer -> FileMaker import). Depending on your installation, these steps have to be performed manually.

6: Optional step if e. g. journal abbreviation is missing you need to select the journal manually (FileMaker Lookup).

7: DOI is not supported by ISI WOS, may have to be entered manually (Ctrl-V). Get also abstract, if missing (Ctrl-A).

## Method 2 using LiteratureMY and BibDesk



Note, *BibDesk* file *Some Refs.bib* could have any name, *FileMaker* file *LiteratureAF* is an example for *LiteratureMY*

1: Optional step

2: Assumes you know that the publication is new and not yet entered into the data base, otherwise you risk to reenter the same publication. You will then have to delete it once the test for presence made below should be positive. However, only a few journals do support this functionality.

3: Make sure you are connected to the internet and properly authenticated, then use "Searches -> Web Of Science SCI" or "Searches -> PubMed" or "Searches -> NEBIS" (for query syntax see below and last Appendix)

4: If it is a journal article ISI WOS (Web Of Science) or PubMed may list it or the journal you are browsing offers BibTeX export (many do). If it is a book NEBIS may list it.

5: This script informs about its results by speech only.

6: For this you need to switch to *FileMaker* and make sure the proper record is currently shown in *LiteratureSE*

7: Scripts such as "Fix DOI and Case In Title, Author" or "Fix-Paste Abstract" may help.

8: Download pdf's only as needed (a pdf may already be available if sharing only a record from *LiteratureSE*). Whenever possible use script "Link PDF from Adobe Reader", given you have the corresponding record currently selected in *BibDesk* and *Adobe Reader* has the pdf frontmost opened. Then this script will link, rename, and store the pdf properly in the pdf repository without any further user intervention needed.



Above diagrams show only major workflows. There are many more possibilities, which are not shown here.

Citations exported for *BibTeX* are often erroneous bib-files and can then not be imported into *BibDesk* without throwing error messages and aborting the import. Manual fixing of the data, e.g. by inventing a cite key and reimporting the edited copy may help to overcome this difficulty. On the spot invented cite keys need then of course later be overwritten with a proper cite key. If encoded as UTF-8 *BibDesk* may much better import such bib-files when using command “Files -> Open Using Filter...” and then choosing as filter the provided utility `~/bin/utf82mac`<sup>141</sup>.

The query syntax to use depends on the service in which you are searching and whether you are searching with a browser, *BibDesk*, or *EndNote*. When you use *BibDesk* to search find in the Appendix «Searching in BibDesk – Query Syntax Summaries». Here some hints on other useful sources explaining how to search meta data from publications:

### *PubMed*

[http://www.ncbi.nlm.nih.gov/books/NBK3827/#pubmedhelp.PubMed\\_Quick\\_Start](http://www.ncbi.nlm.nih.gov/books/NBK3827/#pubmedhelp.PubMed_Quick_Start)

[http://en.wikibooks.org/wiki/How\\_To\\_Search/PubMed](http://en.wikibooks.org/wiki/How_To_Search/PubMed)

[http://www-fgg.eur.nl/medbib/Manuals/M201e\\_PubMed.pdf](http://www-fgg.eur.nl/medbib/Manuals/M201e_PubMed.pdf)

<http://biomed.ucsd.edu/pubmed/pmfields.pdf>

### *NEBIS*

<http://opac.nebis.ch/ALEPH/-/start/nebis-eng> click on Help

### *ISI WOS/WOK*

[https://images.webofknowledge.com/WOKRS512B4.1/help/WOS/hp\\_search.html](https://images.webofknowledge.com/WOKRS512B4.1/help/WOS/hp_search.html)

[https://images.webofknowledge.com/WOKRS512B4.1/help/WOS/hs\\_search\\_rules.html](https://images.webofknowledge.com/WOKRS512B4.1/help/WOS/hs_search_rules.html)

The provided perl script *woksearch.pl* as distributed with our *BibDesk Support* folder allows also to inquire the so-called *WOKSearchLite* and *WOKSearchPremium* web services based on the *SOAP* interface of the Thomson Reuter’s data bases known under ISI WOS or now ISI WOK. You can run this script from any *Terminal* window, but know that this script works on a very low level. Those services are described here:

<http://search.isiknowledge.com/esti/cxf-wsclient-demo/docs/soap/>

<http://wokinfo.com/media/pdf/WebServicesLiteguide.pdf>

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<sup>141</sup> Utility Transferring records *2mac* is made available and installed as part of our *EndNote SE Add Ons*.

<http://www.umces.edu/sites/default/files/pdfs/WoK%20Web%20Services%20and%20Discovery%20Tools%2006-2011.pdf>

Note, *woksearch.pl* was mainly written to debug the behavior of those Thomson Reuters services, which have changed since August 2012 in a surprising way, which caused any use to fail. This was obviously made in an attempt to ask significantly higher payments from academic institutions without providing any new or better service by changing the *SOAP* interface. As of this writing we are still struggling with this service, since Thomson Reuters has begun to change unilaterally those interfaces once more in an undocumented manner<sup>142</sup>. We can only hope that the services will regain the former reliability in the near future.

SOAP interfaces can also be tested with open source tool *SoapUI*:  
<http://sourceforge.net/projects/soapui/>

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<sup>142</sup> The ISI Web of Knowledge Web Services, version 3.0. Published is of this writing only the version 2.0 services.

## A2 Transferring records (Overviews)

### A2.1 TRANSFERS BETWEEN *ENDNOTE* AND *FILEMAKER (LITERATUREMY)*<sup>143</sup>

#### Summary

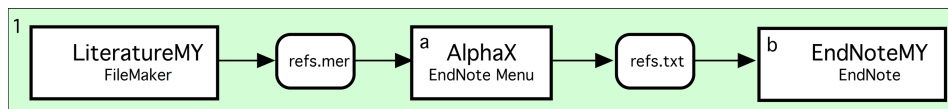
From *FileMaker (LiteratureMY)* to an *EndNote* bibliography file (extension .enl):

- FileMaker* script (⌘-6) exports currently in *LiteratureMY* selected records to currently open *EndNote* bibliography file (includes conversion in *AlphaX*)

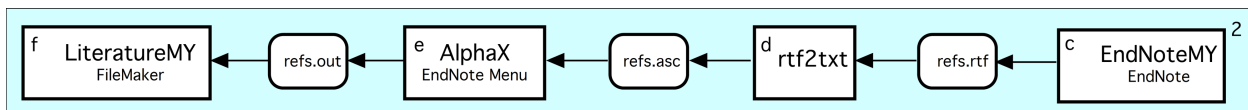
From any *EndNote* bibliography file (extension .enl) to *FileMaker (LiteratureMY)*:



- FileMaker* script (⌘-7) imports currently in *EndNote* selected (or shown) records to currently open *FileMaker* data base *LiteratureMY* (includes conversion in *AlphaX*)

#### 1 From *FileMaker* to *EndNote* (→):



#### 2 From *EndNote* to *FileMaker* (←):



-  Temporarily needed text file
-  Application or tool

Details (background information useful for stepwise execution or debugging):

- In *AlphaX* menu command *Merge To Refer* from *EndNote* Menu converts MERGE format (*refs.mer*) into *EndNote* Refer format (tagged format) (*refs.txt*)
- Import data from *refs.txt* into *EndNote* using filter *EndNote Import* (requires presence of custom filter file *EndNote Import.enf*) - AppleScript *enImport* performs this step
- Export currently selected records using output style *~TAB Export to FileMaker* in rtf format (Rich Text Format) to file *refs.rtf* - AppleScript *enExport* performs this step
- Shell script *en2fm* calling command tool *rtf2txt* to convert *refs.rtf* into MacOS Roman text file format *refs.asc* (TAB delimited)
- In *AlphaX* menu command *EndNote To FileMaker* from *EndNote* Menu converts *EndNote* TAB delimited file *refs.asc* into MERGE format *refs.out* (step executed by AppleScript *enAsc2FM*)

<sup>143</sup> These hints apply only to *EndNote* versions 9 and later.

**f** *FileMaker* script *Import from EndNote (quietly from file 'refs.out')* (reads MERGE format from file *refs.out*) (step executed by AppleScript *enAsc2FM*)

Unfortunately, «From FileMaker to EndNote» (⌘-6) has become a bit less convenient as of Mac OS X 10.5.x (Leopard): The *FileMaker* script does no longer succeed in selecting the file 'refs.txt' as input for *EndNote* automatically. This is due to a new restriction in the operating system. You need to “teach” your system, which file to import from. Fortunately you need to do this only rarely: The script gives you a small time window to select the wanted file 'refs.txt' manually by pausing a bit. Once you have selected in *EndNote* file 'refs.txt' for import, the ⌘-6 script should work as intended.

In general, if you encounter difficulties while importing into *EndNote*, it is recommended to execute once step **b** by importing manually 'refs.txt' while making sure all settings are exactly as described under that step. Note, however, if you have imported from another file, you have to “unlearn” your system and to repeat this teaching once again. IMPORTANT NOTE: This teaching works only if you have *DefaultFolder X* installed and active on your system. Remembering the last file selected in a folder is THE basic and convenient feature provided by utility *DefaultFolder*<sup>144</sup> (a utility configurable via System Preferences).

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<sup>144</sup> <http://www.stclairsoft.com/>

A2.2 TRANSFERS BETWEEN *BIBDESK* AND *FILEMAKER (LITERATUREMY)*

**Summary**

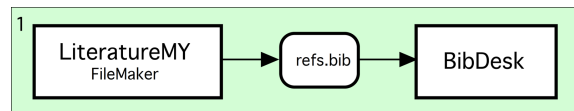
From *FileMaker (LiteratureMY)* to *BibDesk* file (extension .bib):

- 1 *FileMaker* script (**Ctrl-6**) exports currently in *LiteratureMY* selected records to currently open *BibDesk* bibliography file

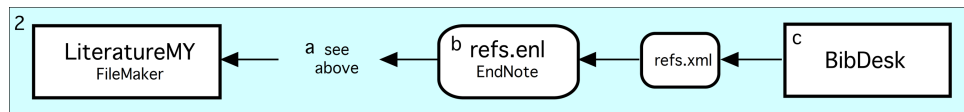
From any *BibDesk* bibliography file (extension .bib) to *FileMaker (LiteratureMY)*:

- 2 *FileMaker* script (**Ctrl-7**) imports currently in *BibDesk* selected (or shown) publications to currently open *FileMaker* data base *LiteratureMY* (includes above described transfer from *EndNote* to *FileMaker (LiteratureMY)*)

1 From *FileMaker* to *BibDesk* (—>) (FM Script *Export to BibDesk*):



2 From *BibDesk* to *FileMaker* (<—) (FM Script *Import from BibDesk*):



- Temporarily needed text file
- Application or tool

Details (background information useful for stepwise execution or debugging):

- a *FileMaker* script (Ctrl-6) exports currently in *LiteratureMY* selected records to currently open *BibDesk* bib file (accomplishes entire transfer in one step). Use *Layout View BibTeX Entry* to see what is exported.
- b During each transfer this temporary *EndNote* bibliography file with fixed name *refs.enl* is created from scratch. Transfer fails if such an *EndNote* bibliography file should exist and be currently opened in *EndNote*.
- c Export currently selected records using AppleScript *Export to EndNote* from within *BibDesk* to a file with fixed name *refs.enl* via temporary file *refs.xml*. File *refs.xml* is written in the *EndNote* XML format as supported by *BibDesk* (see also appendix A2.3).

### A2.3 TRANSFERS BETWEEN *BIBDESK* AND *ENDNOTE*

Export currently selected records using AppleScript *Export to EndNote* from within *BibDesk* to a file with fixed name *refs.enl* via temporary file *refs.xml* (see also appendix A2.2). Transfer the records from there to any other *EndNote* bibliography or rename *refs.enl* as well as the accompanying folder *refs.Data* according to your wishes.

Direct transfers from *EndNote* to *BibDesk* are also possible by using the Output style *~BibTeX Export.ens* as released as part of our *EndNote SE Add Ons* via clipboard (menu command “Edit -> Copy Formatted” (Cmd-K) in *EndNote*, and “New Publications from Clipboard...” (Cmd-Opt-L) in *BibDesk*) or by exporting from *EndNote* the records first in a temporary file such as *refs.bib.txt*<sup>145</sup>, which you open in *BibDesk* using menu command “File -> Open Using Filter...” with filter *~/bin/utf82mac*<sup>146</sup>.

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<sup>145</sup> *EndNote X*. forces you to this and does not allow you to export to a text file with extension *.bib*.

<sup>146</sup> *EndNote X*. cannot export proper ASCII text and only exports *UTF-8* encoded text files.

### A3 Transferring records among applications – possibilities and restrictions

As of this writing it is possible to transfer records freely among following applications:

- FileMaker (FM - LiteratureMY)
- EndNote (EN - EndNoteMY)
- BibDesk (BD - BibDeskMY)

In principle records can be transferred among all three above listed applications (see Appendix «A2 Transferring records (Overviews)» and Section «Using *BibDesk* – a short tutorial»). However, the following problems may occur and/or restrictions apply (see also Appendix «A7 Troubleshooting hints»):

| Transfer | Field     | Problem  | Remedy/circumvention   |
|----------|-----------|--|--|
| EN -> BD | clipboard | Saving refused because of UTF-8 characters           | Copy the clipboard first into an empty <i>AlphaX</i> <sup>147</sup> window, select and copy all back to the clipboard. That clipboard can not only be pasted to BD, but BD will now also save the data base<br>An alternative, forceful technique is to use Carsten Blüm's wonderful <i>PlainClip</i> <sup>148</sup> in mode Convert to ASCII. While this always works, you risk to lose information, e.g. when critical special characters are omitted through this conversion.<br>Once you have the data in BD, another alternative technique is to use in BD the AppleScripts <i>Fix-Paste Abstract</i> (if the culprit is only within the abstract) or <i>Fix DOI and Case In Title, Author</i> (if the culprit is in other fields and/or some bad encoding was done by the provider, some of which these scripts may be able to fix). |
|          | URL       | In BD <Go to ISI>:// remote link dead <sup>149</sup> | Use the superior transfer FM -> BD or run AppleScript <i>Fix PDF and URL Links</i> while having selected the faulty publication(s)   |
| In BD    | Side pane | Wrongly named pdf                                    | Choose menu command "Publication -> Autofile Linked Files..." while having selected the faulty publication(s)  |
| In BD    | Side pane | Dead pdf link  | An alias named <cite key>.pdf may need to be fixed to point properly again at the original file possibly stored within a nested subfolder in   |

<sup>147</sup> As of this writing this technique works with *AlphaX* 8.2b13 and *BibDesk* Version 1.3.21 (1602)

<sup>148</sup> Available from <http://www.bluem.net/en/mac/plain-clip/>

<sup>149</sup> If you install in *BibDesk* the hook *Import Publications* to use AppleScript *Fix PDF and URL Links*, this problem should not show up and be automatically fixed by the hook

|       |           |  |   |
|-------|-----------|--|---|
|       |           |  | your pdf repository. Run AppleScript <i>Make PDF Alias</i> <sup>150</sup> while having selected the faulty publication(s) |
| In BD | Side pane | Superfluous or missing pdf or URL links                | Run AppleScript <i>Fix PDF and URL Links</i> while having selected the faulty publication(s)                              |
| Any   | -         | pdf's are not stored away in subfolders <sup>151</sup> | Run AppleScript <i>Cleanup PDF Repository</i> . It will report on its activity.   |

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<sup>150</sup> This script is only available if you have also installed the *EndNote* utilities as distributed within a disk image with name similar to *EndNote SE Add Ons....* It also requires running *SE\_EN\_Installer.command* and *SE\_BD\_Installer.command* in this sequence.

<sup>151</sup> There may be several reasons for this to occur: First *Folder Actions* are not always reliably handling files entering a folder and once a file entered the folder, *Folder Actions* are no longer triggered. It could also be that *BibDesk*'s hook *Did Auto File* interfered with the *Folder Action* currently active for your pdf repository folder. To minimize the occurrence of such "abandoned" pdf's, make sure you have *Folder Actions* enabled and that AppleScript *Did\_autofile.scpt* is attached as a *Folder Action* for your pdf repository folder and that *BibDesk*'s hook *Did Auto File* does also use AppleScript *Did\_autofile.scpt*.



#### A4 Selecting the correct reference type *Ref\_Type*

Especially when importing records from external sources such as ISI WOS, the field *Ref\_Type* may require editing if it is not a *Journal Article*. The following table describes for all reference types the correct choice, in particular relevant for the more exotic types:

|                               |   |
|-------------------------------|---|
| <i>Journal Article</i>        | Scientific journal article  |
| <i>Electronic Article</i>     | Scientific journal article published in electronic form requiring to cite it via doi  |
| <i>Newspaper Article</i>      | Any non-scientific magazine or newspaper article  |
| <i>Book</i>                   | A book that has an ordinary publisher and all has been written by the same authors and has NO EDITORS!  |
| <i>In Book</i>                | An individual chapter or section out of a book. NOTE: The <b>authors are the same</b> as for the entire book! Don't confound with <i>In Edited Book</i> ! |
| <i>Edited Articles</i>        | A published collection of <i>Journal Articles</i> having editors typically bound as a book that represents a special issue of the scientific journal      |
| <i>Edited Book</i>            | Like a <i>Book</i> , but has editors  |
| <i>In Edited Book</i>         | An individual contribution to an <i>Edited Book</i> written by specific authors (who may or may not be the same persons as the editors)                   |
| <i>Thesis</i>                 | A work such as a master or PhD thesis as conducted at an university   |
| <i>Map</i>                    | A work that is a map  |
| <i>Report</i>                 | A work that has not been published by an institution (not a publisher) and has no editors   |
| <i>Technical Report</i>       | Same as the <i>Report</i> , but of a more technical nature, e.g. manuals or detailed model descriptions   |
| <i>Edited Report</i> *        | Like a <i>Report</i> but has editors  |
| <i>Proceedings</i> *          | Proceedings of a conference that can not be cited as an <i>Edited Book</i>  |
| <i>In Proceedings</i> *       | A work that is a contribution contained in <i>Proceedings</i>   |
| <i>Booklet</i> *              | A work that is printed and bound, but without a named publisher or sponsoring institution.  |
| <i>Web page</i>               |   |
| <i>Unpublished</i> *          | Unpublished work having an author and title   |
| <i>Personal Communication</i> | Findings learned about through personal communications (oral testimony)   |
| <i>Miscellaneous</i> *        | A work that matches none of the above   |

\* use only as a last resort

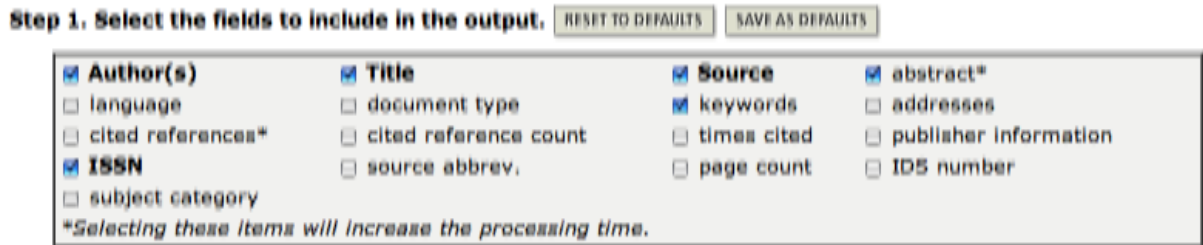
Note, the sequence matters: The earlier the reference type is listed, the more it is to be preferred in case of ambiguities. For instance, if a PhD thesis is published in a scientific journal, cite it as the latter and write only "PhD thesis" into the field *Kind*. If a report is published by an ordinary book publisher, favor *Edited Book* over *Edited Report*. If you can, favor *Edited Book* over *Proceedings*., regardless whether it is actually a *Proceedings*.


Similarly favor *In Edited Book* over *In Proceedings*, even if is actually a contribution to a Proceedings. These priority rules help to find the literature.

Although our approach slightly differs, reference types were originally inspired by *BibTEX* (FISCHLIN & NEMECEK, 2001). Thus it may be useful to consult also: <http://en.wikipedia.org/wiki/BibTeX>

### A5 ISI WOS hints (browser access)

If you use ISI WOS (ISI *Web Of Science* now<sup>152</sup>, ISI *Web Of Knowledge*) at <http://edc.isiknowledge.com/><sup>153 154</sup> to search for literature and download that information to your personal *FileMaker* data base *LiteratureMY*, the following recommendations for choosing fields to download may be useful:

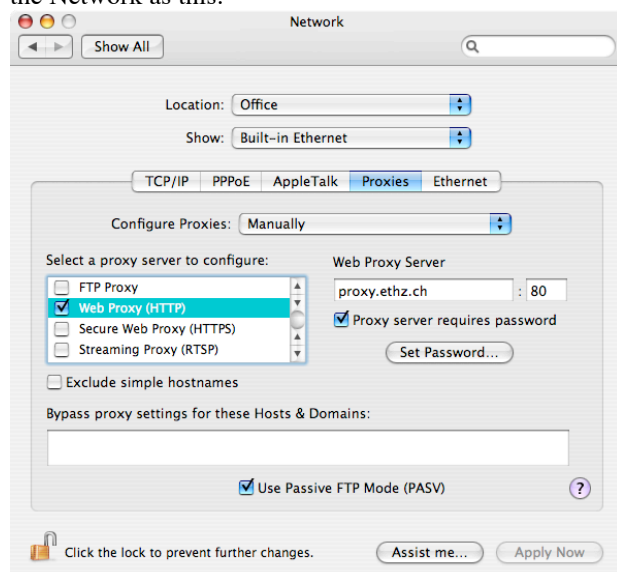


If you register yourself at ISI WOS (recommended), you can also save these settings as your defaults (button **SAVE AS DEFAULTS**). Above field choice supports you optimally in maintaining information in your personal data base *LiteratureMY*. However, unfortunately, ISI WOS does **NOT** support DOIs. This means you need to copy the DOI manually after having downloaded the record from ISI WOS. To accomplish this you need to access the journal article with your browser, best by using the button  in ISI WOS. Once located select the DOI for each article, copy it into the clipboard, and paste it into *LiteratureMY* by choosing the menu command "Scripts -> Paste DOI" (see Section «New Helper Scripts»).

<sup>152</sup> July 2007

<sup>153</sup> This URL may frequently change. Consult our shadow home page for the latest URL to access ISI WOS at <http://www.sysecol.ethz.ch/Internals.html>

<sup>154</sup> The access to this service is restricted to ETH Zurich staff. At ETH Zurich it is most convenient to access this service by using the web proxy server [proxy.ethz.ch](http://proxy.ethz.ch) by setting under Mac OS X the System Preferences for the Network as this:



## A6 On ISO/ANSI Standard Journal Abbreviations

The AppleScript based utility *LTWALookup.scpt* is offered to search conveniently for an abbreviation for the term as is currently hold in the clipboard. The utility searches in a local copy of the LTWA table as offered by ISSN International Centre<sup>155</sup> and as amended by all abbreviations offered previously in the table of this annex below and all contained in «How to work with EndNote». The utility *LTWALookup.scpt* returns whatever abbreviation it can find, again in the clipboard. If no abbreviation can be found the user is informed and the clipboard is left as it was before calling the utility. This utility is distributed via the disk image *EndNote SE Add Ons...* Once the installer script has been executed it can be used independently from any other tool. E.g. I run it on my system with a shortcut (Cmd-Opt-A, A for abbreviation) using *DragThing*. Alternatively you could also install the AppleScript as an OS X wide service.

Useful sources and links for standard journal abbreviations:

FISCHLIN, 2001 Appendix H, p.40ff. («How to work with EndNote»)

<http://cassi.cas.org/search.jsp><sup>156</sup> (also available as one of the *Hot URLs* in *LiteratureMY*)

<http://www.issn.org/services/online-services/access-to-the-ltwa/><sup>157</sup> (also available as one of the *Hot URLs* in *LiteratureMY*)

<http://www.issn.org/understanding-the-issn/standardization/>

<http://www.library.illinois.edu/bix/resources/journals/abbreviations.html>

<http://atlantis.ncmr.gr/abbreva.htm>

<http://home.ncifcrf.gov/research/bja/>

<http://library.caltech.edu/reference/abbreviations/>

<http://www.aeaweb.org/journal/abbrev.html>

<http://www.public.iastate.edu/%7ECYBERSTACKS/JAS.htm>

[http://www.wsl.ch/publikationen/abk\\_DE](http://www.wsl.ch/publikationen/abk_DE)

ISI WOS offers also huge lists of journal abbreviations. However, it is not possible to give here a direct link: Go to ISI WOS (<http://apps.webofknowledge.com>) and click on tab *Cited Reference Search*. On the search page underneath search field *Cited Work* you find a link named [View abbreviation list](#).<sup>158</sup>

For transparency reasons the table previously provided here is still listed below, but is considered to be frozen as of 1.Mar.2018 and will no longer be updated. If new terms may be added as part of the additions made to the LTWA table, e.g. because they are of particular

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<sup>155</sup> <http://www.issn.org/services/online-services/access-to-the-ltwa/>

<sup>156</sup> Returns journal titles with their abbreviated titles, which generally adhere well to the ANSI standard

<sup>157</sup> LTWA is based on an ISO standard, and we have so far relied for abbreviations on an ANSI standard. While the two standards are very similar, be nevertheless careful, since occasionally the ISO may deviate from the ANSI standard. Ex.: The ANSI abbreviation for management is *manage.*, not *manag.* as used in LTWA (accessed 19.Apr.2014). Not surprisingly, journals use different abbreviations and/or standards and consequently, e.g. ISI WOS (see below) lists journal abbreviations with both variants, i.e. *MANAGE* as well as *MANAG*.

<sup>158</sup> Last access 27.Feb.2018

interest to systems ecologists, those terms will only be made available through the utility *LTWALookup.scp*.<sup>159</sup>

| Abbreviated Word                          | ANSI/ISO Abbreviation <sup>160</sup> | Little or not abbreviated form | In specialized J. used, strongly abbreviated (Jargon abbreviation) <sup>161</sup> |
|---|--------------------------------------|--------------------------------|---|
| Africa, African                           | Afr.                                 |                                |   |
| Assessment                                | Assess.                              |                                |   |
| Biogeochemical                            | Biogeochem.                          |                                |   |
| Change, Changes                           | Chang.                               | Change                         |   |
| Comparative                               | Comp.                                |                                |   |
| Cycles                                    | Cycles                               | Cycles                         |   |
| Fossil                                    | Foss.                                |                                |   |
| Frontiers                                 | Front.                               |                                |   |
| Global                                    | Glob.                                | Global                         | G, e.g. GCB (Glob. Chang. Biol.)  |
| Indian                                    | Indian                               | Indian                         |   |
| Integrative, Integral, Integrated         | Integr.                              |                                |   |
| Regional                                  | Reg.                                 |                                |   |
| Resources                                 | Resour.                              |                                |   |
| Silviculture, Silvicultural, Silvicultura | Silvic.                              |                                |   |
| Software                                  | Software                             | Software                       |   |
| Sustainable                               | Sustainable                          | Sustainable                    | Sustain.  |
| Planetary, Planetarium                    | Planet.                              |                                |   |

<sup>159</sup> The master file is ‘/Volumes/HD2/OriginsOfAFsProgs/OSX Shell Scripts/EN-Utills/LTWA/SE abbreviations (from Fi084 and Fi087) - edited6-UTF-8.txt’, which is maintained manually. The shell script ‘prepLTAW.sh’ constructs then from the latest LTWA as downloaded from <http://www.issn.org/services/online-services/access-to-the-ltwa/> the wanted lookup file, e.g. ‘LTWA\_20160915-SE-UTF-8.txt’.

<sup>160</sup> To my knowledge the two standards ANSI and ISO are very compatible and deviate little from each other.

<sup>161</sup> Should be avoided and only used if well established and widely in use. Ex.: PNAS

## A7 Troubleshooting hints

Once all is well installed and configured, work flow should be smooth. However, there are complicated approaches necessary to get all the element cooperate with each other well, notably when transferring records. For a smooth operation and full coordination between the *LiteratureMY* system, AlphaX' menu "EndNote", *EndNote*, and *BibDesk* you should also ensure the following is consistent:

- a) `~/bin/LITMYPATH.txt` file is present, this is key, and exports environment variables
  - LITMY (denoting your work folder, e.g. where you keep your *LiteratureMY* FileMaker files),
  - LITUSER (e.g. "af" or "dg") is consistent with what is defined in *LiteratureMY*,
  - MYPDFDIR1 and MYPDFDIR2, both denoting to your pdf's repository folders. Note, MYPDFDIR2 is used only if MYPDFDIR1 does not exist; this supports the use of up to two computers, e.g. your desktop Mac and your MacBook Air having slightly different absolute path to your pdf repository and moving/synchronizing your pdf's depository between them. Those environment variables are currently only used by this script and utility *makeal* (released as part of the so-called *EndNote utilities*, see *SE Add Ons*), but their use is reserved possibly also for other scripts)
- b) It is assumed you have per machine only one pdf repository folder (MYPDFDIR1 or MYPDFDIR2)
- c) It is assumed your pdf repository folders, i.e. MYPDFDIR1 and MYPDFDIR2, are both hierarchically structured as expected, i.e. they contain for each letter subfolders, where all pdf's are stored in the letter folder matching their first character. Such a folder is available as part of this release package.
- d) The preference of *LiteratureMY* (field 'hierarchy') should be set consistently with the actual structure of your pdf's repository folder, i.e. set to a value such as 1 (for sure not 0). Otherwise you risk to get unpredictable results, since *LiteratureMY* uses also an auto filing mechanism functioning according to the exact same rules as employed by the scripts 'Did\_autofile' and/or 'pdfwar - Store In Letter Folder' and the ones *LiteratureMY* uses internally.
- e) The preference setting used by *BibDesk* "AutoFile -> File papers in fixed location" should be active and the folder chosen should be set consistently set to same folder as MYPDFDIR1 or MYPDFDIR2, respectively, point. Similarly *LiteratureMY* should also be set to use the very same depository folder. Use layout *Configure PDF/WAR reading/downloading* to choose it.

As of this release, some scripts, notably "Did\_autofile" and "pdfwar - Store In Letter Folder" maintain also a log of their actions, which is by default "`~/myAutoFiling.log`". In case of troubles you might find useful information there (albeit note, the flushing is not perfect and in case of crashes, some information may be missing from the log). All logging does only append, thus be aware, a lot of information may accumulate there.

It may also be helpful to consult Appendix «A3 Transferring records among applications – possibilities and restrictions»

## A8 Correspondence between *EndNote*, *FileMaker*, and *BibDesk/BibTEX* reference types

The following table may be handy in knowing which *EndNote* reference type (field *Reference Type*) corresponds to which *FileMaker* reference type (field *Ref\_Type*) and to which *BibDesk* or *BibTEX*, respectively, entry type (see also the similar table in Section «*Exporting to BibTEX files*», which is sorted by *LiteratureMY* fields).

Reference types are tabulated below in alphabetical order of the original standard *EndNote* reference type regardless of renaming, i.e. SE customizations. If the reference type has been modified from the original (standard) *EndNote* reference type to match exactly the naming convention in *LiteratureMY*, i.e. SE customizations, the original (standard) *EndNote* reference type is also listed. Note, any reference types consisting of multiple words are separated always by hard blanks, not mere blanks and have therefore been customized even if otherwise the reference type appears unchanged. E.g. the common reference type Journal Article falls under this category<sup>162</sup>. This ensures proper searching for a particular reference type within *FileMaker* and unique mapping of reference types among the three systems.

Yellow highlighted are reference types of particular interest. Transfers to watch out for are highlighted in light yellow. They may require some manual editing of the reference types once the transfer is complete, since no matching or no unique matching is possible among the three systems in all cases. Light brown colored are reference types introduced by *EndNote* versions beyond *EndNote XI*. Pink highlighted are changes made as of *EndNote X7* and beyond.

| # <sup>163</sup> | <i>EndNote XI</i> <sup>164</sup>    | <i>LiteratureMY</i> ‡ | <i>BibDesk</i> <sup>165</sup><br>( <i>BibTEX</i> <sup>166</sup> ) |
|------------------|-------------------------------------|-----------------------|---|
|                  | Aggregated Database                 | -                     | -   |
|                  | Ancient Text                        | -                     | -   |
|                  | Artwork                             | -                     | -   |
|                  | Audiovisual Material                | -                     | -   |
|                  | Bill                                | -                     | -   |
|                  | Blog                                | -                     | -   |
| 6                | Book                                | Book                  | <b>book</b> <sup>167</sup>  |
| 5 <sup>168</sup> | In Book <sup>†</sup> (Book Section) | In Book               | <b>inbook</b> <sup>169</sup>                                      |

<sup>162</sup> Due to limitations within *EndNote* this requires in import filters to enclose the %0 field, i.e. the reference type, within back quotes to ensure proper mapping of reference types during importing. Ex.: `Journal Article`. Otherwise you risk that imported records are not recognized properly and end up as reference type *Generic*.

<sup>163</sup> The numbers given here in the first column are the ones used to denote reference types in XML files (e.g. tag <ref-type>6</ref-type> denotes a *Book*; used file extension '.xml'). Such files are used either during export from or import to *EndNote* or when exporting from *BibDesk*, e.g. using AppleScript *Export to EndNote.scpt*. Since XML files can be opened by any ordinary text editor, those numbers may be useful for debugging transfers involving XML files. Note, these numbers differ from the IDs used by *EndNote* to define reference types, i.e. as used in file *RefTypeTable.xml* residing in '~/.Library/Application Support' in tags <RefType>. E.g. ID 5 in <RefType id="5" name="Newspaper Article">... differs from # 23 used to specify the record to be of reference type *Newspaper Article*.

<sup>164</sup> The table also lists reference types supported by *EndNote* versions later than *XI*. Those are highlighted in light brown.

<sup>165</sup> *BibDesk* is an open source application available from <http://bibdesk.sourceforge.net/>

<sup>166</sup> *BibTEX* standard reference types (entry types) are listed in bold. Other reference listed in this column are extensions to the *BibTEX* standard as offered by *BibDesk* (Version 1.3.21 (1525) or later)

<sup>167</sup> In this case a *BibTEX* field *author* instead of *editor* should be present in the record

|                  |   |                           |   |
|------------------|---|---------------------------|---|
| 5 <sup>170</sup> | In Edited Book <sup>†</sup> (Book Section)          | In Edited Book            | <b>incollecion</b> <sup>⊕</sup>                 |
|                  | Case  | -                         | -   |
|                  | Catalog   | -                         | -   |
|                  | Chart or Table                                      | -                         | -   |
|                  | Classical Work                                      | -                         | -   |
| 9                | Tech Report <sup>†</sup> (Computer Program)         | Tech Report               | <b>manual</b>                                   |
| 47               | In Proceedings <sup>†</sup> (Conference Paper)      | In Proceedings            | <b>inproceedings, conference</b> <sup>171</sup> |
| 10               | Proceedings <sup>†</sup> (Conference Proceedings)   | Proceedings               | <b>proceedings</b>                              |
|                  | Dictionary  | -                         | glossdef  |
| 28               | Edited Book <sup>†</sup> (Edited Book) <sup>⊖</sup> | Edited Book               | <b>book</b> <sup>172</sup>                      |
| 43               | Electronic Article <sup>†</sup> (Electronic)        | Electronic Article<br>173 | <b>electronic</b>                               |

<sup>168</sup> Valid for all *EndNote* versions prior to *EndNote X7* and prior to *LiteratureMY 3.7r1* (see footnote<sup>⊕</sup>)

<sup>†</sup> Edited reference type to match exactly the *LiteratureMY*'s reference type. The original (standard) *EndNote* reference type is given in parantheses. It determines the tabulation order.

<sup>169</sup> *BibTEX*'s entry type *inbook* as well as *LiteratureMY*'s reference type *In Book* are both restricted to a book authored by the same author(s) as the cited section. Don't confound this type with *BibTEX*'s entry type *incollecion* or *LiteratureMY*'s reference type *In Edited Book*, which are used for a contribution of authors in an edited book. Unfortunately *EndNote* does not differentiate these two cases and users often confound them. Our system always keeps the two cases clearly separate by mapping *incollecion* exclusively to the SE custom *EndNote* reference type *In Edited Book* (*Unused 1* prior to *EndNote X7*, *Book Section* as of *EndNote X7*, see footnote<sup>⊕</sup>). To avoid data loss in case of sharing *EndNote* libraries with colleagues, however, SE custom *EndNote* reference type *In Book* does tolerate a field *Editor*, which of course should remain empty for a true *In Book* reference.

<sup>170</sup> Valid as of *EndNote X7* and as of *LiteratureMY 3.7r1* and later versions (see footnote<sup>⊕</sup>)

<sup>⊕</sup> As of *EndNote X7* (pink rows) the internal encoding of the SE custom *EndNote* reference types *In Book* was swapped with *In Edited Book* for better compatibility when sharing *EndNote* bibliography files with colleagues. Since the reference type *In Book* is considerably rarer than *In Edited Book* and *EndNote* uses internally by default for the latter reference type *Book Section*, this swapping enables in general for a much smoother sharing of bibliography files among colleagues. Neither redefining reference types in *EndNote Xi* nor editing of the reference type for all records with reference type *In Edited Book* is any longer needed.

Importing the reference type definitions from file *SE EndNote RefTypes.xml* as distributed within disk image *EndNote SE Add Ons X7r01* or later versions will erroneously change reference types of existing *EndNote* bibliography files made with the older system. As of *EndNote X6* you can use menu command "Find and Replace..." to correct for this. E.g. follow these steps:

- 0) Check that library contains no references of reference type *Custom*;
- 1) Find those few where Reference Type is "In Edited Book";
- 2) Replace for find: "In Edited Book" -> "Custom";
- 3) Find all where Reference Type is "In Book";
- 4) Replace for find: "In Book" -> "In Edited Book";
- 5) Find all where Reference Type is "Custom";
- 6) Replace for find: "Custom" -> "In Book".

<sup>171</sup> *BibTEX*'s entry type *conference* is a synonym to *inproceedings*, not *proceedings*, and its purpose is outdated (<http://nwalsh.com/tex/texhelp/bibtex-11.html>). Our system does not use *conference* at all and I recommend against its use to avoid confusion. Use exclusively *inproceedings*.

<sup>⊖</sup> Notice that the original (standard) reference type of *EndNote* has a simple space between the two words. Since FileMaker requires for unique mapping a hard blank (character 202 decimal on a Macintosh, UTF-8 160, on Mac generated with key combination Option-Blank), this reference type had to be customized for a hard blank between the words.

<sup>172</sup> In this case a *BibTEX* field *editor* instead of *author* should be present in the record



|    |   |                       |                            |
|----|---|-----------------------|----------------------------|
|    | Article) <sup>⊖</sup>                                       |                       |                            |
|    | Electronic Book   | -                     | -                          |
|    | Electronic Book SEction                                     | -                     | -                          |
|    | Encyclopedia  | -                     | -                          |
|    | Equation  | -                     | -                          |
|    | Figure  | -                     | -                          |
|    | Film or Broadcast   | -                     | -                          |
| 13 | Generic   | Miscellaneous         | <b>misc</b>                |
| 13 | Generic <sup>174</sup>                                      | Booklet               | <b>booklet</b>             |
|    | Government Document   | -                     | -                          |
|    | Grant   | -                     | -                          |
|    | Hearing   | -                     | -                          |
|    | Interview   | -                     | -                          |
| 17 | Journal Article <sup>+</sup> (Journal Article) <sup>⊖</sup> | Journal Article       | <b>article §</b>           |
|    | Legal Rule or Regulation                                    | -                     | -                          |
|    | Magazine Article  | -                     | -                          |
|    | Manuscript  | -                     | -                          |
| 20 | Map   | Map                   | <b>misc</b> <sup>175</sup> |
| 23 | Newspaper Article   | Newspaper Article     | <b>article §</b>           |
|    | Online Database   | -                     | url                        |
|    | Online Multimedia   | -                     | url                        |
| 24 | Booklet <sup>176+</sup> (Pamphlet)                          | Booklet               | <b>booklet</b>             |
| 25 | Custom <sup>+</sup> (Patent)                                | Custom <sup>177</sup> | <b>misc</b>                |
| 26 | Personal Communication                                      | - <sup>178</sup>      | -                          |
|    | Podcast   | -                     | -                          |
|    | Press Release   | -                     | -                          |
| 27 | Report  | Report                | <b>techreport</b>          |
|    | Serial  | -                     | periodical                 |

<sup>173</sup> Newly supported reference type. Fields are to be treated the same as an ordinary *Journal Article*. This new reference type offers the following advantage: It allows you to distinguish two types of journal articles in the used Output Style of *EndNote* used to generate the list of references: For instance *Journal Article*'s without a DOI and *Electronic Article*'s with a DOI.

<sup>174</sup> In *EndNote X1* reference types *Booklet (LiteratureMY)* and *booklet (BibTEX, BibDesk)* are mapped to the *EndNote* reference type *Generic*. Not so in later versions such as *EndNote X3* or newer (see below).

§ By default *BibTEX* can not distinguish between journal and newspaper articles. However, during exports from *BibDesk* of a record of this reference type, e.g. using AppleScript *Export to EndNote.scpt*, the presence of the optional field *Newspaper* (while mandatory field *Journal* remains empty) determines whether the exported record will obtain reference type *Newspaper Article* or *Journal Article*.

<sup>175</sup> *BibTEX* entry type *misc* encodes reference type *Map (EndNote, LiteratureMY)* if the record contains field *Cartographer* in place of standard *BibTEX* field *author (BibDesk later than Version 1.3.21 (1525))*.

<sup>176</sup> *EndNote X1* recognizes not yet type *Pamphlet* and therefore any transfer between *LiteratureMY* and *EndNote X1* requires a manual reassignment of the reference type after the transfer has been completed (here not highlighted in light red). Note, *EndNote X2* has serious deficiencies relative to *EndNote X1* and I recommend strongly against its use. However, later versions, notably *EndNote X3, X5, X6, and X7* are again generally fine and all distinguish the new *EndNote* reference type *Booklet* (factory reference type *Pamphlet*).

<sup>177</sup> Use reference type *Custom* in *EndNote* as a custom style you can customize freely to accommodate special needs of your publisher.

<sup>178</sup> Actually this reference type is tolerated and its transfer is fully supported between *EndNote* and *LiteratureMY*. However, it is recommended to enter a personal communication only within *EndNote* bibliographies and to avoid burdening *LiteratureMY* from storing records of such rather ephemeral nature.

|                   |   |                         |   |
|-------------------|---|-------------------------|---|
|                   | Standard                                | -                       | -   |
|                   | Statute                                 | -                       | -   |
| 32                | Thesis                                  | Thesis                  | <b>masterthesis, phdthesis, jurthesis</b> |
| 34                | Unpublished Work                        | Unpublished             | <b>unpublished</b>                        |
| 12                | Web Page                                | Web Page <sup>179</sup> | webpage                                   |
| 40 <sup>180</sup> | In Edited Book <sup>†</sup> (Unused 1)  | In Edited Book          | <b>incollection</b>                       |
| 40 <sup>181</sup> | In Book <sup>†</sup> (Unused 1)         | In Book                 | <b>inbook</b> ⊕                           |
| 41                | Edited Report <sup>†</sup> (Unused 2)   | Edited Report           | <b>report</b>                             |
| 42                | Edited Articles <sup>†</sup> (Unused 3) | Edited Articles         | <b>proceedings</b>                        |

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<sup>179</sup> Newly supported reference type. The *LiteratureMY* field *URL* is mandatory and the *LiteratureMY* field *No.* may contain the access date. In case that field *No.* is empty, the *LiteratureMY* field *Entry\_Date* is used as the access date.

<sup>180</sup> Valid for all *EndNote* versions prior to *EndNote X7* and prior to *LiteratureMY 3.7r1* (see footnote⊕)

<sup>181</sup> Valid as of *EndNote X7* and as of *LiteratureMY 3.7r1* and later versions (see footnote⊕)

## A9 Correspondence between *EndNote*, *FileMaker*, and *BibDesk/BibTEX* fields

The following table may be handy in knowing which *EndNote* field corresponds to which field in *FileMaker* and *BibDesk*. The red highlighted field is the main key that identifies each record. Yellow highlighted are field names, which are particularly important to remember well or which are not obvious, yet commonly used. Teal highlighted are fields that are new in *EndNote X2* and *EndNote X3*.

| #  | Field Name in <i>EndNote X</i> . <sup>182</sup> | Field Name in <i>LiteratureMY</i> ‡ | Field Name in <i>BibDesk</i> <sup>183</sup>                         |
|----|---|-------------------------------------|---|
| 1  | Reference Type                                  | Ref_Type                            | <i>entry type</i> <sup>184</sup>                                    |
| 2  | Author  | Authors                             | author,<br>cartographer <sup>185</sup>                              |
| 3  | Year  | Year                                | year  |
| 4  | Title   | Title                               | title   |
| 5  | Secondary Author                                | Editors                             | editor <sup>186</sup>   |
| 6  | Secondary Title                                 | JOrPubl                             | journal, booktitle  |
| 7  | Place Published                                 | City                                | address   |
| 8  | Publisher                                       | Publisher                           | publisher,<br>organization,<br>institution, school,<br>howpublished |
| 9  | Volume  | Vol                                 | volume  |
| 10 | Number of Volumes                               | Microfiche                          | <i>custom5</i> *  |
| 11 | Number  | No.                                 | number  |
| 12 | Pages   | pp                                  | pages   |
| 13 | Section   | -                                   | -   |
| 14 | Tertiary Author                                 | SeriesEditor                        | <i>custom5</i> *  |
| 15 | Tertiary Title                                  | SeriesTitle                         | series  |
| 16 | Edition   | Edition                             | edition   |
| 17 | Date  | PlaceDate                           | month   |
| 18 | Type of Work                                    | TypeOfWork                          | type  |
| 19 | Subsidiary Author                               | -                                   | -   |
| 20 | Short Title                                     | -                                   | -   |
| 21 | Alternate Title <sup>187</sup>                  | -                                   | -   |
| 22 | ISBN/ISSN                                       | ISBN                                | isbn  |

<sup>182</sup> Names as used in the reference type *Generic* as of *EndNote X1* or later versions

‡ This field correspondence is valid as of this writing for *EndNote X1* (Bld 2377) or later versions (including *EndNote X7* (Bld 9013) Version 17.0.0.9013) and *LiteratureMY* v3.0r2 (January 2008) or later versions (including v3.7r1)

<sup>183</sup> *BibDesk* supports any field names, but listed here are only those that are used by *LiteratureMY* when exporting to *BibTEX*

<sup>184</sup> Has actually no special field name and is the first identifier used in the record

<sup>185</sup> To encode reference type *Map* (*EndNote*, *LiteratureMY*) you can use in *BibDesk* (later than Version 1.3.21 (1525)) the field *Cartographer* in place of standard *BibTEX* field *author*.

<sup>186</sup> *BibTEX* entry type *book* encodes the reference type *Book* or *Edited Book* (*EndNote*, *LiteratureMY*), respectively, depending whether the record contains a field *author* or *editor*.

\* Field *custom5* is reserved for internal use while transferring records back and forth between *BibDesk* and *LiteratureMY* via *EndNote*.

<sup>187</sup> May be used for internal purposes in case of reference type *Generic*

|    |                                   |  |   |
|----|-----------------------------------|--|---|
| 23 | DOI                               | DOI  | doi <sup>188</sup>                            |
| 24 | Original Publication              | -  | -   |
| 25 | Reprint Edition                   | -  | -   |
| 26 | Reviewed Item                     | Owners   | custom5 *                                     |
| 27 | Custom 1                          | Users  | custom5 *                                     |
| 28 | Custom 2                          | Ref_Status   | custom5 *                                     |
| 29 | Custom 3                          | Entry_Date   | custom5 *                                     |
| 30 | Custom 4                          | Modified   | custom5 *                                     |
| 31 | Custom 5                          | -  | custom5 *                                     |
| 32 | Custom 6                          | Custom_6   | custom5 *                                     |
| 33 | Custom 7                          | Custom_7   | custom5 *                                     |
| 34 | Accession Number                  | -  | -   |
| 35 | Call Number                       | Bibl.  | custom5 *                                     |
| 36 | Label                             | SysEcolCode  | cite key                                      |
| 37 | Keywords                          | Keywords   | keywords                                      |
| 38 | Abstract                          | Summary  | abstract                                      |
| 39 | Notes                             | Project, InUseFor,<br>StoragePlace,<br>InCrdIndex <sup>189</sup> | annotate                                      |
| 40 | Research Notes                    | Comments <sup>190</sup>  | annotate                                      |
| 41 | URL                               | URL  | url<br>(Bdsk-Url-1, -2 ...) <sup>191</sup>    |
| 42 | File Attachments                  | pdf_pathfilename_URL   | local-url<br>(Bdsk-File-1 ...) <sup>192</sup> |
| 43 | Author Address                    | -  | -   |
| 44 | Figure                            | -  | -   |
| 45 | Caption                           | -  | -   |
| 46 | Access Date                       | -  | -   |
| 47 | Last Modified Date <sup>193</sup> | -  | -   |
| 48 | Translated Author                 | -  | -   |
| 49 | Translated Title                  | -  | -   |

<sup>188</sup> Since the field *Doi* may also represent an URL, e.g. <http://dx.doi.org/<DOI>>, or hold alternatively an URL, this field is also involved in *BibDesk*'s conversions of file and URL fields. Thus, the presence of this field depends on the mode of conversion: Conversion with keeping so-called local URLs preserves this field, a conversion without keeping it will remove it and replace it by fields named *Bdsk-Url-1*, *Bdsk-Url-2* etc. Transferring a DOI URL stored in such a field *Bdsk-Url-1* to *LiteratureMY* will reconstruct the content of the field DOI.

<sup>189</sup> For legacy reasons all these fields are stored in *BibTEX* field *note* using a specific keyword

<sup>190</sup> When exporting from *LiteratureMY* to *EndNote*, field *Comments* ends up in *EndNote*'s field *Research Notes*. When exporting from *LiteratureMY* to *BibTEX*, field *Comments* ends up in *BibDesks*' field *annotate*. When importing into *LiteratureMY*, *EndNote*'s field *Notes* as well as *Research Notes* (or *BibTEX*'s *note* and *annotate*, respectively) are both merged into *LiteratureMY*'s field *Comments*.

<sup>191</sup> URLs of web sites are here entered as e.g. "<http://www.sysecol.ethz.ch>". However, when using *BibDesk*, the presence of these fields depends on the mode of conversion of file and URL fields: Conversion with keeping so-called local URLs preserves this field, a conversion without keeping it will remove it and replace it by fields named *Bdsk-Url-1*, *Bdsk-Url-2* etc. *BibDesk* lists these fields under the heading **Remote URLs**.

<sup>192</sup> Links to pdfs are here entered as so-called file URLs, e.g. `file://localhost/Volumes/HD/uaf/Data%20Bases/AFEles/afEles_AFCD100/F/Fi103.pdf`. Normally *BibDesk* (1.3.21 (1525)) automatically converts this to the internally used file linking scheme, which can also safely be exported to *EndNote*'s *File Attachments* and from there to *LiteratureMY*. Once converted by *BibDesk*, this field is normally removed and replaced by fields *Bdsk-File-1*, *Bdsk-File-2* etc., *BibDesk* lists these fields under the heading **Local Files**.

<sup>193</sup> Replaced by new field 'Custom 8' as of *EndNote X2* and becomes field 'Last Updated' at position 54

|                 |                             |   |   |
|-----------------|-----------------------------|---|---|
| 50              | Name of Database            | - | - |
| 51              | Database Provider           | - | - |
| 52              | Language                    | - | - |
| 53 <sup>C</sup> | Added to Library            | - | - |
| 54 <sup>C</sup> | Last Updated <sup>194</sup> | - | - |

---

<sup>C</sup> New field only available as of *EndNote X2* or later versions

<sup>194</sup> Former field *Last Modified Date* as used in *EndNote X1*

## A10 Reference types and used field names

This describes the differences in naming of the various *EndNote* fields as used by the supported reference types. These names were chosen for easier recognition of the fields as used in the *FileMaker* data base *LiteratureMY* and to correct for inconsistencies and deficiencies in the default use of some fields by *EndNote* <sup>195</sup>. These modifications are available in the file *SE EndNote RefTypes.xml* (see released dmg-file *EndNote SE Add Ons*).

The following table lists the used field names, which are used for all reference types:

| Generic field name             | Used field name (in all reference types) |
|--------------------------------|--|
| Reviewed Item                  | Owners                                   |
| Custom 1                       | Users                                    |
| Custom 2                       | RefStatus                                |
| Custom 3                       | EntryDate                                |
| Custom 4                       | ModifyDate                               |
| Custom 5                       | Microfiche                               |
| Label                          | SysEcolCode                              |
| File Attachments (Link to PDF) | Link to PDF                              |

The following lists some commonly used and critical field names, which are only used for specific reference types:

| Reference type                 | Generic field name | Used field name          |
|--------------------------------|--------------------|--------------------------|
| Journal_Article <sup>196</sup> | Publisher          | Abbreviated J            |
| Newspaper_Article              | Publisher          | Abbreviated<br>Newspaper |
| Edited_Articles                | Publisher          | Abbreviated J            |

---

<sup>195</sup> Depending on the reference type, *EndNote* 's default uses different fields for the same content, i.e. *Series Editor* or *Series Title*. The SE modification of reference types attempts to simplify transfers from *LiteratureMY* to *EndNote* and vice versa by using fields more consistently and by correcting for other citation difficulties present in *EndNote* 's defaults.

<sup>196</sup> Note that the underscore character actually denotes a hard blank (character 202 decimal on a Macintosh, UTF-8 160, on Mac generated with key combination Option-Blank)

**A11 Importing: *EndNote* tags and corresponding fields (from *EndNote* manual)**

The table below shows the tags recognized in the *EndNote* import format and the corresponding *EndNote* field into which each tagged item is imported for the Generic reference type. For other reference types, many fields may be mapped to the Notes field (since a limited number of fields are typically used by each reference type). The Figure field is not included for importing as our system does not support that.

| Tag | EndNote Generic Field Name                        |
|-----|---|
| %A  | Author  |
| %B  | Secondary Title<br>(of a Book or Conference Name) |
| %C  | Place Published                                   |
| %D  | Year  |
| %E  | Editor /Secondary Author                          |
| %F  | Label   |
| %G  | Language  |
| %H  | Translated Author                                 |
| %I  | Publisher   |
| %J  | Secondary Title (Journal Name)                    |
| %K  | Keywords  |
| %L  | Call Number                                       |
| %M  | Accession Number                                  |
| %N  | Number (Issue)                                    |
| %P  | Pages   |
| %Q  | Translated Title                                  |
| %R  | DOI   |
| %S  | Tertiary Title                                    |
| %T  | Title   |
| %U  | URL   |
| %V  | Volume  |
| %W  | Database Provider                                 |
| %X  | Abstract  |
| %Y  | Tertiary Author                                   |
| %Z  | Notes   |
| %0  | Reference Type                                    |
| %1  | Custom 1  |
| %2  | Custom 2  |
| %3  | Custom 3  |
| %4  | Custom 4  |
| %6  | Number of Volumes                                 |
| %7  | Edition   |

| Tag  | EndNote Generic Field Name |
|------|----------------------------|
| %8   | Date                       |
| %9   | Type of Work               |
| %?   | Subsidiary Author          |
| %@   | ISBN/ISSN                  |
| %!   | Short Title                |
| %#   | Custom 5                   |
| %%\$ | Custom 6                   |
| %]   | Custom 7                   |
| %&   | Section                    |
| %('  | Original Publication       |
| %)   | Reprint Edition            |
| %*   | Reviewed Item              |
| %+   | Author Address             |
| %^   | Caption                    |
| %>   | File Attachments           |
| %<   | Research Notes             |
| %[   | Access Date                |
| %=   | Last Modified Date         |
| %~   | Name of Database           |

However this list as shown similarly in *EndNote* manuals is not fully correct for later versions than *EndNote X1*:

First, the tag %O for field *Alternate Title* supported as of *EndNote X2* and later versions is on purpose not listed in above table, since algorithms in our system swap the tags %O and %Z for backward compatibility reasons with older *EndNote* versions<sup>197</sup>. Currently our system still uses for field *Notes* tag %O and uses for field *Alternate Title* tag %Z.

As of *EndNote X7* the tag %= is listed as *Custom 8* and no longer *Last Modified Date*.

See also Max Planck digital library web page «[PubMan Func Spec Endnote Mapping](#)»<sup>198</sup>

<sup>197</sup> Required considerably less changes in the cumbersome *EndNote* customizations as needed to overcome *EndNote*'s deficiencies and bugs (and as provided via the files contained in *EndNote SE Add Ons...*)

<sup>198</sup> As of 27.Oct.2015 [http://colab.mpg.de/mediawiki/PubMan\\_Func\\_Spec\\_Endnote\\_Mapping](http://colab.mpg.de/mediawiki/PubMan_Func_Spec_Endnote_Mapping)



**A12 Searching in *BibDesk* – Query Syntax Summaries**

- **AD=Address**
- **AU=Author**
- **CF=Conference**
- **CI=City**
- **CU=Country**
- **ED=Editor**
- **FG=Grant Number**
- **FO=Funding Agency**
- **FT=Funding Text**
- **GP=Group Author**
- **OG=Organization**
- **PS=Province/State**
- **PY=Year Published**
- **SA=Street Address**
- **SG=Suborganization**
- **SO=Publication Name**
- **TI=Title**
- **TS=Topic**
- **ZP=Zip/Postal Code**

ISI Web Of Science

| <b>Index</b> | <b>Meaning</b>              |
|--------------|-----------------------------|
| au           | Personal author name        |
| ti           | Title                       |
| isbn         | ISBN                        |
| issn         | ISSN                        |
| cc           | Local classification number |
| su           | Subject key words           |
| date         | Date                        |
| dp           | Date of publication         |
| da           | Acquisition date            |
| la           | Language code               |
| ab           | Abstract                    |
| note         | Note                        |
| af           | Conference as author name   |

Z39.50 Services

Some *PubMed* fields

|                          |        |
|--------------------------|--------|
| Affiliation              | [AD]   |
| All Fields               | [ALL]  |
| Author Name              | [AU]   |
| Entrez Date              | [EDAT] |
| Issue                    | [IP]   |
| Journal Title            | [TA]   |
| Language                 | [LA]   |
| MeSH Major Topic         | [MAJR] |
| MeSH Terms               | [MH]   |
| Page Number              | [PG]   |
| Personal Name as Subject | [PS]   |
| Publication Date         | [DP]   |
| Publication Type         | [PT]   |
| Subheadings              | [SH]   |
| Text Words               | [TW]   |
| Title/Abstract Words     | [TIAB] |
| Unique Identifiers       | [UID]  |

Searches are case insensitive, boolean expressions can contain AND, OR, and parentheses.  
Ex.: "Fischlin A" [au] AND (forest [TIAB] OR insect\* [all])

## Web of Science Searching Syntax


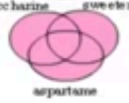

### Wildcard symbols

| Symbol | Retrieves  |
|--------|--|
| *      | Zero or more characters<br>'carbon'<br><i>carbon, hydrocarbon, polycarbonate</i> |
| \$     | Zero or one character<br>colo\$r<br><i>color, colour</i>                         |
| ?      | One character only<br>en?oblast<br><i>entoblast, endoblast</i>                   |

### Proximity operators

|                  |   |
|------------------|---|
| Phrase searching | To search for an exact phrase enter the phrase in quotation marks. <i>Note: the use of quotation marks disables lemmatization of terms.</i><br>Example: "stem cell"                           |
| NEAR/x           | Terms occur within a user-specified number of words within the same field. If no number is specified, the system defaults to 15.<br>Example: canine NEAR/10 virus<br><b>canine NEAR virus</b> |
| SAME             | Used only in the address field. Terms must occur within the same address.<br>Example: yale SAME hosp  |

### Boolean operators

|  |  |
|--|--|
|  <p><b>AND</b><br/>aspartame cancer*</p>                  | <p>All search terms must occur to be retrieved.</p> <p><b>TOPIC: "stem cell" AND lymphoma</b></p> <p>Retrieves documents that contain the phrase stem cell and the term lymphoma. This is equivalent to searching "stem cell" lymphoma</p> |
|  <p><b>OR</b><br/>saccharine sweetener*<br/>aspartame</p> | <p>Any one of the search terms must occur to be retrieved. Use when searching variants and synonyms.</p> <p><b>TOPIC: aspartame OR saccharine OR sweetener</b></p> <p>Retrieves documents that contain at least one of the terms.</p>      |
|  <p><b>NOT</b><br/>aids hearing</p>                     | <p>Excludes records that contain a given search term.</p> <p><b>TOPIC: aids NOT hearing</b></p> <p>Retrieves documents with aids, excluding any which also contain hearing.</p>  |

### Common search fields

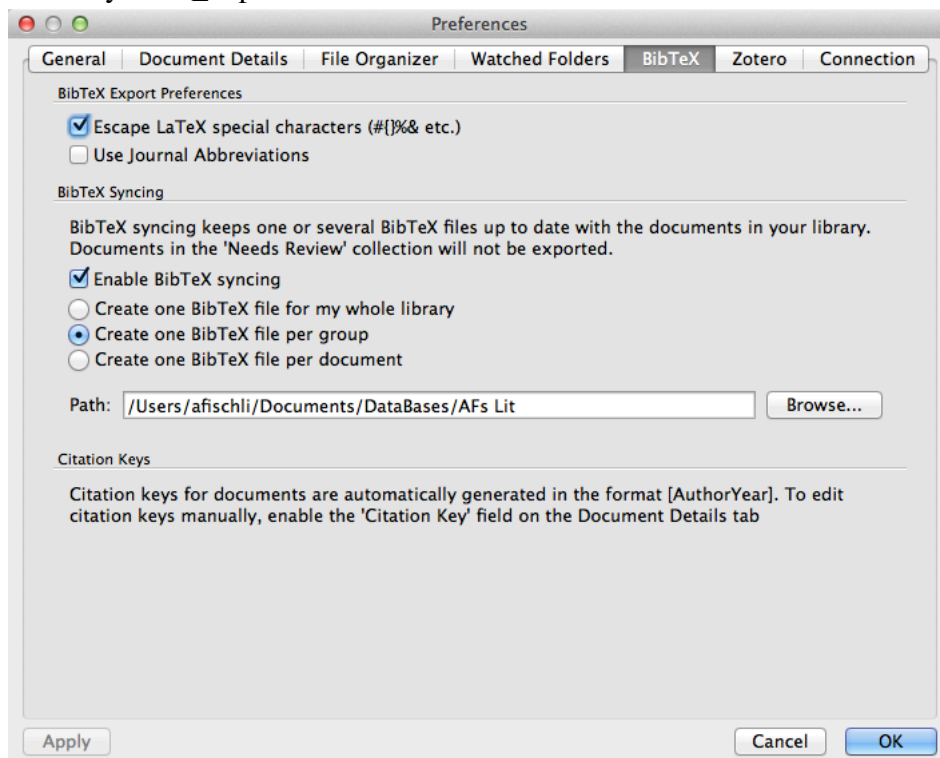
|                    |   |  |
|--------------------|---|--|
| Topic              | Searches all words (no stop words) in Article titles, Abstracts, Author Keywords, KeyWords Plus fields.                                       | "white oak" or "quercus alba"<br>Vitamin A                   |
| Author             | Searches any available author on the paper  | Bergstrom CT<br>Wallen K*                                    |
| Author Identifiers | Searches Researcher ID numbers associated with author profiles on <a href="http://www.researcherid.com">www.researcherid.com</a> or ORCID ids | A-1009-2008<br>0000-0001-5297-9108                           |
| Group Author       | Group or organization credited with authorship  | Aberdeen Lung Cancer Group<br>Beta Cell Biology Consortium   |
| Publication Name   | Journal title   | Czech Journal of Food Sciences<br>Progress in Brain Research |
| Publication Year   | Year article was published  | 1999<br>2003-2005  |
| Address            | Searches abbreviated author affiliations  | Emory Univ, Dept Biol, Atlanta, GA 30329 USA                 |

### A13 Using Mendeley

*Mendeley* has become popular lately and institutions such as ETH Zurich libraries even recommend the use of *Mendeley*. *Mendeley* has some strength such as syncing between devices, however, *Mendeley* has also many serious flaws. In a setup like ours these flaws are very fatal and preclude a professional use of *Mendeley*. This is somewhat similar to *EndNote* but the flexibilities in terms of customization of *EndNote* are larger and make it possible to circumvent its flaws while maintaining proper control over the content of the data base, justifying the full support for *EndNote* as done here. That is not the case for *Mendeley*, which makes it very difficult to control its content, which is partly due to just the downside of its syncing strength.

As of this writing *Mendeley*<sup>◇</sup> contains many bugs, yet it can be used to share a bibliography among authors if certain rules are observed. The following assumes a scenario where *LaTeX* is used for writing an article by a team of authors and an article specific *BibTeX* file is used for the references. It is also assumed that some if not all records are entered using *Mendeley*. In any case the goal is to have shared *Mendeley* data base that is consistent with the *BibTeX* file.

- (i) Create in *Mendeley* a project specific group to which all co-authors belong.
- (ii) Create within that group two folders ‘Acquired’ and ‘Fixed’ and ask all group members to enter any records only to ‘Acquired’. The folder ‘Fixed’ must contain only cleaned up records.
- (iii) Mendely *BibTeX* preferences should be set similar to this:



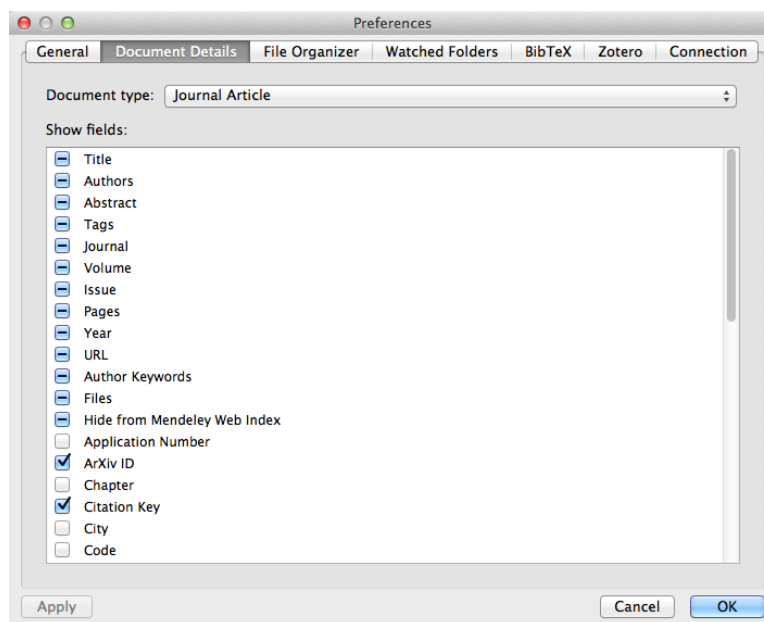
Checking the checkbox ‘Escape LaTeX special characters ( $\{\}\%&$  etc.)’ means a *TeX* encoding for direct *LaTeX* use similar to the *BibDesk* preference ‘Convert accented characters to TeX when exporting or pasting BibTeX’ tab ‘Opening and Saving’. However, note that the encoding used by *Mendeley* is incompatible with

<sup>◇</sup> *Mendeley Desktop* Version 1.15.2 and *Mendeley iOS App* 2.8.1, 3.Feb.2016

the one *BibDesk* uses. E.g. Umlaut ‘ü’ is written by *Mendeley* as ‘{\“{u}}’, whereas *BibDesk* writes this as ‘{\“u}’. Opening a *Mendeley* created bib-file – as results from checking option ‘Enable BibTeX syncing’ – does then not properly display such special characters.

- (iv) Regularly empty the automatically created and updated *BibTeX* file ‘<group name>-Acquired.bib’ (named after the group and its folder ‘Acquired’, residing in the directory given by preference Path) and process the newly acquired records the usual way by transferring them to *LiteratureMY*.
- (v) Once cleaned up transfer the records to any temporary *BibTeX* file and import all records back into *Mendeley*’s group ‘Fixed’ using menu command “File -> Import... -> BibTeX (\*.bib)” (see below for details).
- (vi) The records are now available in the *BibTeX*-file ‘<group name>-Fixed.bib’ and are automatically written, i.e. one-way synced, to that file by *Mendeley*. This is quite a useful solution, since this file can typically directly be used by *LaTeX* for typesetting<sup>199</sup>. However, note, this file resides in the directory given by *Mendeley Desktop* preference Path (see above), which may not be the wanted directory where you currently work with *LaTeX*, i.e. your *LaTeX* work folder. In such cases I recommend to use a symbolic link in the *LaTeX* work folder pointing to ‘<group name>-Fixed.bib’ as maintained automatically by *Mendeley*<sup>200</sup>.

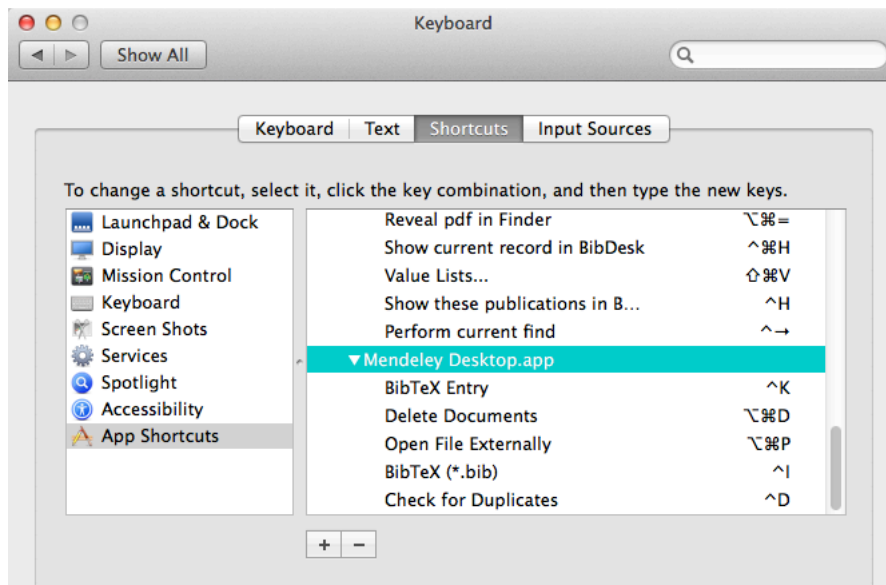
Other preferences may matter as well, notably make sure ‘Citation Key’ is enabled/checked in preference ‘Document Details’ for all reference types similar to this:



<sup>199</sup> Critical problems may arise however due to incompatible reference types and special character encoding. The former is due to the fact that *Mendeley*’s set of reference types is lacking quite important reference types such as ‘In Edited Book’ (*BibTeX* entry type ‘incollection’) or ‘In Proceedings’ (*BibTeX* entry type ‘inproceedings’) and is often faulty in terms of how it handles reference types (problematic are *BibTeX* entry types ‘mastersthesis’, ‘misc’, ‘phdthesis’, ‘proceedings’, and ‘unpublished’). Special characters may appear as garbled up UTF-8 characters, since *Mendeley* fails to properly code all these.

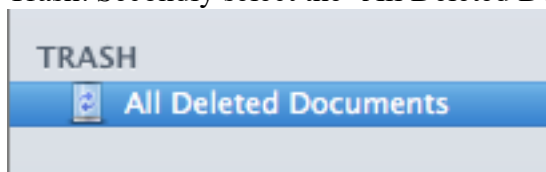
<sup>200</sup> Note that it does not help to edit the *BibTeX* file ‘<group name>-Fixed.bib’, e.g. to fix a bad reference type, or a buggy encoding, since *Mendeley* will overwrite its content at regular intervals. Even additionally imported records, which are not contained in *Mendeley* are deleted by *Mendeley*. Thus you have to live with whatever *Mendeley* does to that file and hope you can nevertheless typeset your *LaTeX* document. If that’s impossible (see above) then the only remedy is to have a separate copy of the *BibTeX* file in your *LaTeX* work folder. That may in general be the safest and therefore most recommendable work setup.

Convenient shortcuts<sup>201</sup>, since often used menu commands, are:



Importing records into *Mendeley* is very difficult, since *Mendeley* does not want to give up on records once entered and insists on reinserting wrong meta data, hereby overwriting corrected meta-data and one has otherwise great difficulties in getting rid of records. After long testing and making efforts to circumvent this buggy behavior the following, admitted quite cumbersome procedure, is recommended:

- 1) **Delete the records in *Mendeley Desktop* you wish to reimport.** Yes, indeed, this is very tedious, but it seems unavoidable. Note deleting does not work right away and is a tedious process. Fortunately the latest version of *Mendeley Desktop* as of this writing<sup>†</sup> has made it a bit clearer what is going on and seems also to work more reliable during deletion. First you need to select the records you wish to delete. **Do not hit backspace**, or you will merely remove the records from the folder in case the selected records are in a folder such as ‘Acquired’ or ‘Fixed’. Instead choose menu command “File -> Delete Documents”. The records are now moved to the *Mendeley* Trash. Secondly select the ‘All Deleted Documents’ under TRASH

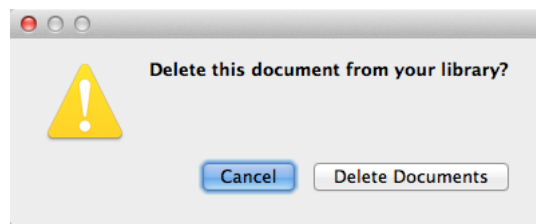


Thirdly choose menu command “File -> Empty Trash” and fourthly answer the resulting dialog with ‘Delete Documents’ (unfortunately not the default)

<sup>201</sup> Note, shortcut ‘Open File Externally’ does unfortunately not work as it is a contextual menu command.

<sup>†</sup> *Mendeley* 1.16.1 has improved here by no longer offering a Trash button, since the deletion while a folder is selected means not deletion, but removal from the folder only (observed early April 2016).





Note also that any linked files are not actually deleted. They are merely moved to a folder 'Archive'<sup>202</sup>. While this is fine in terms of keeping possibly annotated files save, this may consume quite a bit of storage if pdf's accumulate there, e.g. during reimporting.

The entire deletion process is quite tedious and time consuming. However, at least it seems now to work reliably in contrast to earlier versions of Mendeley.<sup>†</sup>

Even now you can not be sure to have really deleted all documents (see next steps 2 and 3).

- 2) **Sync to the cloud repository.** This is necessary to really get rid of the deleted records. However, often records do still survive in the cloud and your local data base, but are not properly displayed. Such records are here nicknamed "Zombie" records. To be really safe that all records, including "Zombie" records, are deleted, I recommend to sync also to an iPad. There you should see reliably all not yet fully deleted Zombie records outside the any folders of the group such as 'Acquired' and 'Fixed'.
- 3) **Delete "Zombie" records using *Mendeley Desktop*:** Use the global search facility (top right corner) in *Mendeley Desktop* to be able to select the "Zombie" records. E.g. search by author or title portion. Note, the "Zombie" records are typically not visible in any of the ordinary views of the group's folders and may also contain wrong meta data. Repeat previous steps until you find no more "Zombie" records. Sometimes "Zombie" records are not even searchable and repeated quit/relaunch cycles while always syncing to the cloud may be necessary. The most reliable solution for making sure you have really all "Zombie" records deleted is to see in the iOS App *Mendeley* whether some "Zombie" records are still in the data base. Note in *Mendeley Desktop* the number of records shown in the group and all its folders does not change upon deleting a "Zombie" record.

With latest version of Mendeley Deskopt as of this writing<sup>†</sup>, this problem may have be gone or at least lessened. However, without full deletion, indeed wrong meta data are merged into a just imported record and corrections of bad meta data through reimporting is still impossible.

- 4) **Prepare your records in form of a UTF-8 encoded *BibTEX* file.** If you work as recommended normally with 'Western (MacOS Roman)' encoding then you need to convert the *BibTEX* file first. You could use e.g. utility 'iconv' or 'mac2utf8' but the most convenient technique is to export the file from BibDesk in UTF-8 encoding menu command "File -> Export..." and check possibly the box 'Only export selected items' as you wish. If you miss out on this step you risk that *Mendeley* will contain corrupted special characters, e.g. Umlaute or other special characters will not be correctly displayed but look like the ugly ❖ (see for keywords, journal names etc.)

---

<sup>202</sup> On my system this folder is ~/Documents/DataBases/AFEles/Mendeley pdfs/Archive/ as set in *Mendeley* preference 'File Organizer'.

and a tedious manual deletion will be required as described above. Note also, since *Mendeley* does not properly decode *TEX* code, that you must not have the BibDesk preference ‘Convert accented characters to TeX when exporting or pasting BibTeX’ checked. Fortunately *Mendeley* can at least correctly import UTF-8 encoded files.

- 5) **Make sure the BibDesk preference ‘Remove converted Local File fields’ of tab ‘Default Fields’ in section ‘Converting File and URL’ is unchecked.** If checked *Mendeley* will ignore any attached files. Note, *Mendeley* as of this writing<sup>†</sup> ignores all remotely linked files. It can only recognize the local file field ‘Local-URL’. Thus it is preferable to have always that preference unchecked when working with *Mendeley*.
- 6) Only now will you be able to successfully **import the records into *Mendeley Desktop* using menu command “File -> Import... -> BibTeX (\*.bib)” and sync.**

All of above idiosyncracies and bugs in *Mendeley* were observed as of this writing with the versions as described in this footnote<sup>‡</sup>.

Another problem is the fact that *Mendeley* will nevertheless transmogrify the meta data. Critical reference types are missing, authors will not be represented correctly in many cases, e.g. complex von parts, treatment of special characters is buggy, and most annoyingly *Mendeley* insists on ignoring your cite keys upon syncing. The latter is of course terrible and makes the use of *Mendeley* for some professional work impossible and means that you can never relate corresponding records properly by cite key between an iOS device and your *Mendeley Desktop*. E.g. it is not possible to find a record on your iPad by its cite key! This behavior is of course against all data base theory and any decent data base software should never allow for such a behavior. Moreover, this is also particularly bad for pdf’s, which are renamed upon syncing and can never be properly maintained, e.g. if you would like to use another, more powerful App for annotations such as *GoodReader*.

The worst property of a reference manager is when it is a one-way application. Fortunately, *Mendeley* offers now rather good export facilities, e.g. its export to a *BibTEX* file is not bad. Unfortunately, the result is however not that compatible to our system when it comes to special characters. They may not be readable in *BibDesk*, e.g. if *TEX* encoding is used in *Mendeley* (see above), This is because *Mendeley* uses unfortunately another format than *BibDesk*, i.e. Umlaute such as ‘ö’ are coded as ‘\’{o}’, whereas *BibDesk* uses ‘{’o}’. And if UTF-8 encoding would be used by *Mendeley* (option ‘Escape LaTeX special characters (\${}%& etc.)’ unchecked) then we have another conflict with our default encoding used by *BibDesk*, i.e. ‘Western (Mac OS Roman)’.

The main argument against *Mendeley* is, however, its ignorance of a proper data base management by not honoring user specified cite keys, notably when it comes to a strength of *Mendeley*, i.e. syncing across devices. The aforementioned difficulties to get rid of records may be merely related to this problem of not honoring cite keys as a main key of the data base. What *Mendeley* should do instead is to honor user entered cite keys throughout the system and across all devices. *Mendeley* is so bad that it does not even sync cite keys via an extra field or in the note field across all devices. As a consequence, you cannot find a record on an iPad if you know that record’s cite key! *Mendeley* should also accept any user provided input data as resulting from imports when cite keys match, which would make any cumbersome deletion of records superfluous, and *Mendeley* should refrain from overwriting user corrected meta data with wrong data from the cloud or from internal meta data archives. Only then would the foundation of *Mendeley* be sufficiently solid and *Mendeley* could be recommended for professional use, since there would be good reasons for hope that the many other bugs currently present might be removed at some point in the future.



## A14 Kindle e-books

Non-fiction books are typically listed in my *FileMaker* data base *LiteratureMY* and have therefore a *SECode* (cite key). All those azw-files have a symlink in the PDF repository named after the original file and the *SECode*. E.g.

Or032.azw

points to file

B003RRXX08\_EBOK.azw

in the folder

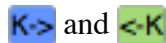
/Users/afischli/Library/Containers/com.amazon.Kindle/Data/Library/Application Support/Kindle/My Kindle Content

or if I should have renamed the file to a memnometrically easier name e.g. to

Or032-B003RRXX08\_EBOK-Oreskes-2010-Merchants\_of\_doubt.azw

In addition to the symbolic links there are also kept zip archives of the originally named set of files within the PDF repository as well as the 'My Kindle Content' folder. All the files involved should be tagged green for easier recognition.

All of above is very easy to accomplish by *FileMaker* scripts offering two little buttons in the top right corner of the standard layout:



They operate on individual files and can rename the files according to above rules, tag them, create symbolic links and all zip files. See shell scripts

~/bin/manageMyKindleBooks.sh

~/bin/settag.sh

Moreover, *LiteratureMY* can find all Kindle books and offers *FileMaker* scripts that operate on entire current sets as a convenient alternative to the aforementioned buttons. As an important result *BibDesk* and *LiteratureMY* can then find those files and open the e-Book in the application *Kindle*.

*LiteratureMY* contains a *FileMaker* script «*Personal Finds -> Find my Kindle e-books*» to search for all Kindle e-books. As of this writing (28.Jun.2016) these are in *LiteratureAF*:

Fr095, Fr120, Ha465, Ma568, Ma572, Nu015, Or032, Or036, Ra200, Ri153, Sche042, Schu049, Va147

All these records must contain the so-called Kindle code in the 3rd repetition and the name suffix in 4th repetition of field 'Bibl.'. Ex.:

Or032-B003RRXX08\_EBOK-Oreskes-2010-Merchants\_of\_doubt.azw

The red part is stored in repetition 3 and the blue part in repetition 4 of *FileMaker* field 'Bibl.'. Otherwise the *FileMaker* scripts will not succeed. Upon first time use of button or

*FileMaker* script «*Set custom format for current set of Kindle E-books*» the user is offered a dialog for each Kindle book to enter those data.

Following caveats apply: The application *Kindle* seems to tolerate the renaming, given the renaming happens while *Kindle* is not running (*manageMyKindleBooks.sh* automatically quits the application *Kindle*). However, I believe having once observed that *Kindle* would change the code it uses for a book (red part). Latest testing using a Mac (OS X 10.9.5 Mavericks) and an iPad, however, showed no problem and syncing back and forth worked well.

- Yet, annotations can get lost. The remedy may then be to extract the files from one of the zip archives, again while *Kindle* is not running (option `-x` of *manageMyKindleBooks.sh*) or to remove the book from the device from within *Kindle* and redownload it from Amazon. In some cases I had to do the latter, since the accompanying files in the zip archive containing the annotations were already the wrong ones.
- Books may become archived, e.g. was the case for Fr120. This means the file is recorded by *Kindle* to have been removed from my Mac. With renaming there is a risk that you may end up with a double entry of the same book within *Kindle*. This requires of course manual fixing, which may involve similar actions as described above.
- Amazon clears out all content upon logout/deregistering (menu command “Kindle -> Preferences... -> Deregister (button)”). This is one reason to keep a zip archive. However, the readability is not warranted. For some books, e.g. Va147, which I had to buy not in my main Amazon account but in the German Amazon store, cannot be opened when application *Kindle* is registered to my main account. However, this is not symmetric. While I am registered to the German Amazon store I can read the books that I bought in the main Amazon store.<sup>203</sup>

Note, a zip such as

‘Schu049-B003JBHW08\_EBOK-Schulz-2010-Being\_wrong.zip’

contains

B003JBHW08\_EBOK.apnx

B003JBHW08\_EBOK.azw

B003JBHW08\_EBOK.mbpV2

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<sup>203</sup> This behavior is not necessary reproducible according to my observations. Sometimes a Kindle e-book can at least be opened, even if the annotations got lost and despite the fact that it was purchased in another store than the current one. Sometimes that very same book can even be opened with all annotations intact despite the fact it was purchased in another store than the current one. Sometimes the very same book cannot even be opened and the application *Kindle* insists on me removing this particular e-book from the device and then to redownload it before opening becomes possible again. The reasons for these differences escape me. On the other hand these observations clearly indicate that read access is not only controlled by the involved files themselves, but also by additional data used by *Kindle*. It would be useful to understand that better and to store that metadata as well in the zip archives generated by utility *manageMyKindleBooks.sh* in order to be able gain some minimal control over purchased e-books (An SQLite data base exists within folder ‘~/Library/Containers/com.amazon.Kindle/Data/Library/Application Support/Kindle/Cache/db’). Note, all this applies only to the application *Kindle* on a Mac. On an iPad there is no option to leave e-books purchased on the device when going through a de-registering cycle. As of this writing (29.Jun.2016) the application *Kindle Kindle* (version 1.12.4 41014) offers (still?) the possibility to uncheck the check box “Remove all licensed content from this device” when deregistering.

B003JBHW08\_EBOK.ph1

Since the *Kindle* application immediately assumes a file is new as soon as its file has been renamed, it is advisable to make on the very last page of any book a bookmark that states whether the book has actually been read or is really new. Best to add also the date of completing the reading.

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