

## Report:

Fischlin, A., 2009. Using BibDesk - A short tutorial.

In: Fischlin, A., *Excerpt from Latest additions to the literature management system of Terrestrial Systems Ecology group ETH Zurich*. Systems Ecology, Institute of Integrative Biology, ETH Zurich (Swiss Federal Institute of Technology), Zurich, Switzerland, 73pp.



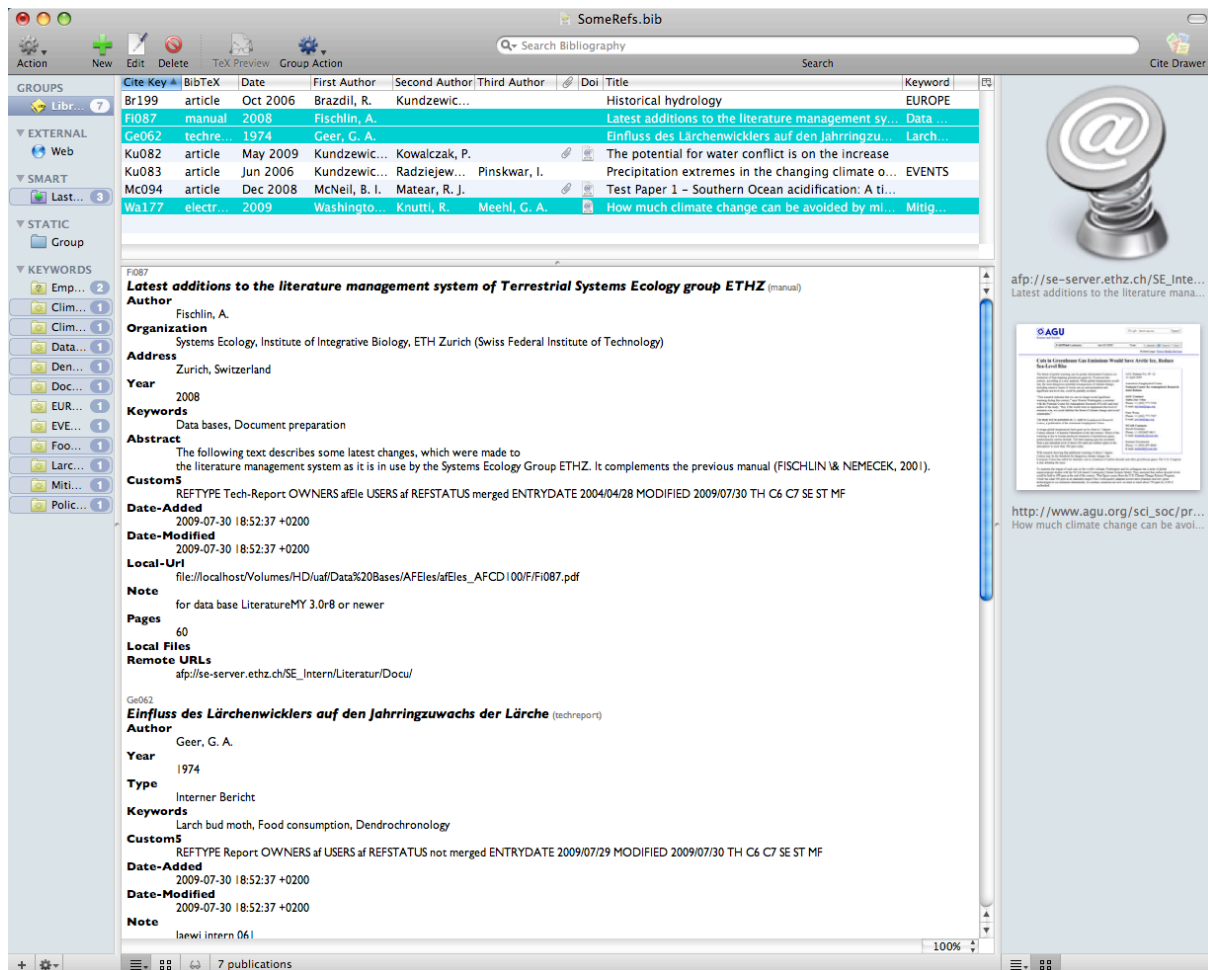
## Summary:

This excerpt is a tutorial guiding a new user of *BibDesk* step by step through the typical use of *BibDesk*. Although the tutorial is targeted at members of the Systems Ecology Group of ETH Zurich, Switzerland, it is of general interest, since it describes typical working steps using *BibDesk*. Simply skip over any sections that are too specific. After the tutorial this excerpt does also describe in detail how to customize *BibDesk*, which is not only of particular interest to members of the systems ecology group, but may also be of interest to other *BibDesk* users, notably since no official *BibDesk* tutorial exists. The excerpt also contains some possibly useful tables relating BibTeX/*BibDesk* and *EndNote* reference types and fields together with the *FileMaker* based data base for the members of the Systems Ecology group at ETH Zurich.

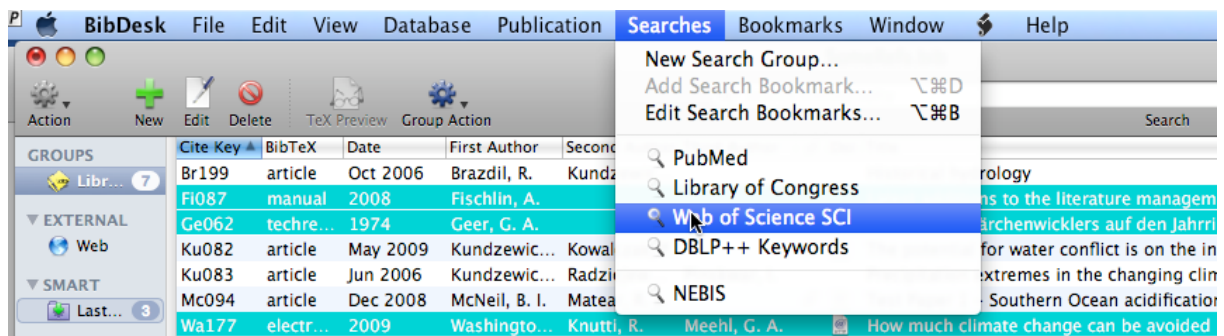
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### 1.9.2 USING BIBDESK - A SHORT TUTORIAL

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:



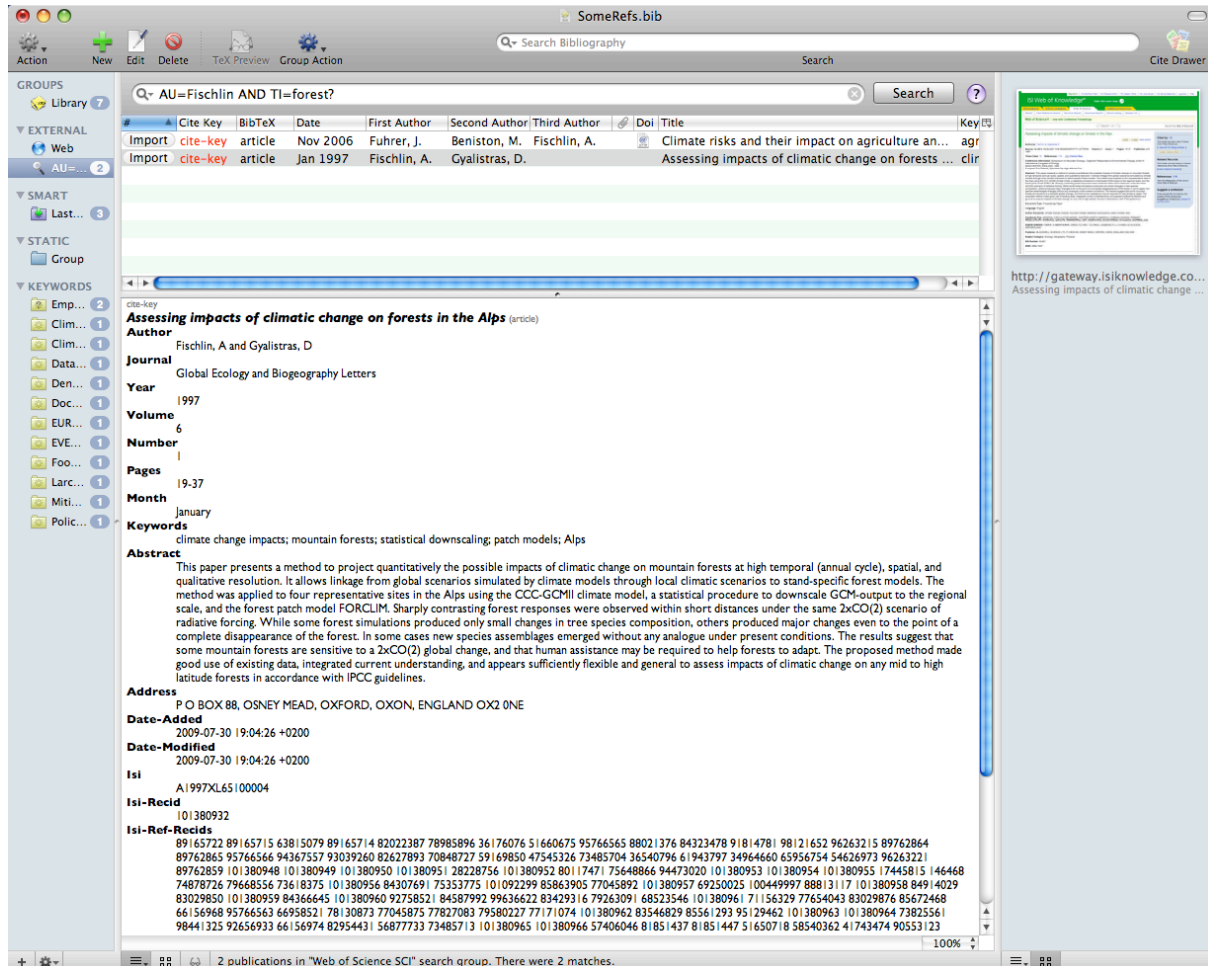
Secondly try to acquire some references from ISI Web of Science by choosing menu command “Searches -> Web of Science SCI”:



Then type

AU=Fischlin AND TI=forest?

into the appearing search field<sup>69</sup> and press return you should get something similar to this:




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

<sup>69</sup> 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)

The screenshot shows a web browser window with the SpringerLink website. The main content area displays the article title "Climate risks and their impact on agriculture and forests in Switzerland" by Fuhrer, J. and Beniston, M. and Fischlin, A. and Frei, Ch. and Goyette, S. and Jasper, K. and Pfister, Ch. The article is from the journal "Climatic Change", Volume 79, Number 1-2, pages 79-102, published in November 2006. The keywords listed are "agriculture; climate change; extreme events; forests; society; Switzerland". The DOI is 10.1007/s10584-006-9106-6. On the right side, there is a "SpringerLink" logo and a "Content Types" section with a "Journal Article" icon. Below that, there is a "Recognized as:" section listing affiliations like "Center for Security Studies (CSS) Library" and "ETH Zuerich". There is also a "Welcome!" message and a "My Menu" section with links for "Marked Items", "Alerts", "Order History", and "Saved Items".

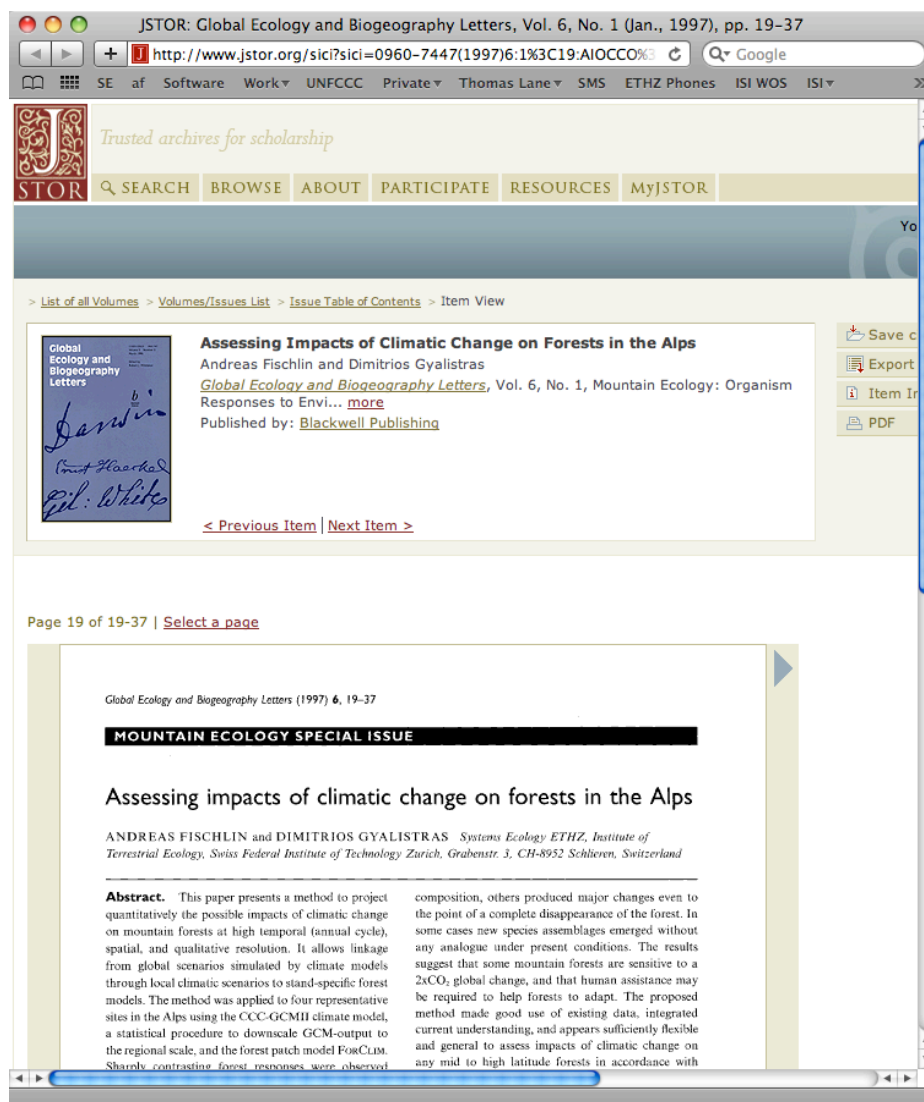
You may decide you are not really interested in the Fuhrer et al. (2006) paper but wish to keep Fischlin & Gyalistras (1997) (assuming this record is really missing in your *LiteratureMY*). Accomplish the import by clicking onto the little import button in the leftmost column, i.e. **Import cite**. Then 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:

The screenshot shows a web browser window displaying a list of bibliographic records in a table. The table has columns for Cite Key, BibTeX, Date, First Author, Second Author, Third Author, DOI, and Title. The records are sorted by date, with the most recent at the top. The first record is "Br199 article 2006 Brazdil, R. Kundzewicz... Historical hydrology". The second record is "F1087 manual 2008 Fischlin, A. Assessing impacts of climatic change on forests...". The third record is "F1160 article Jan 1997 Fischlin, A. Gyalistras, D. Latest additions to the literature management system...". The fourth record is "Ge062 techre... 1974 Geer, G. A. Einfluss des Lärchenwicklers auf den Jahrringzu...". The fifth record is "Ku082 article 2009 Kundzewicz... Kowalczak, P. The potential for water conflict is on the increase...". The sixth record is "Ku083 article 2006 Kundzewicz... Radziejew... Pinskiwar, I. Precipitation extremes in the changing climate o...". The seventh record is "Mc094 article 2008 McNeil, B. I. Matear, R. J. Southern Ocean acidification: A tipping point at ...". The eighth record is "Wa177 electr... 2009 Washington... Knutti, R. Meehl, G. A. How much climate change can be avoided by mi...".

Note, a new main key (*cite key*) has automatically been assigned<sup>70</sup> and the red cite-key symbol [cite-key](#), which indicated a missing main key, is gone. You can now also access the ISI WOS web site clicking onto the top right thumbnail in the pane to the right side of the window and using there the button 



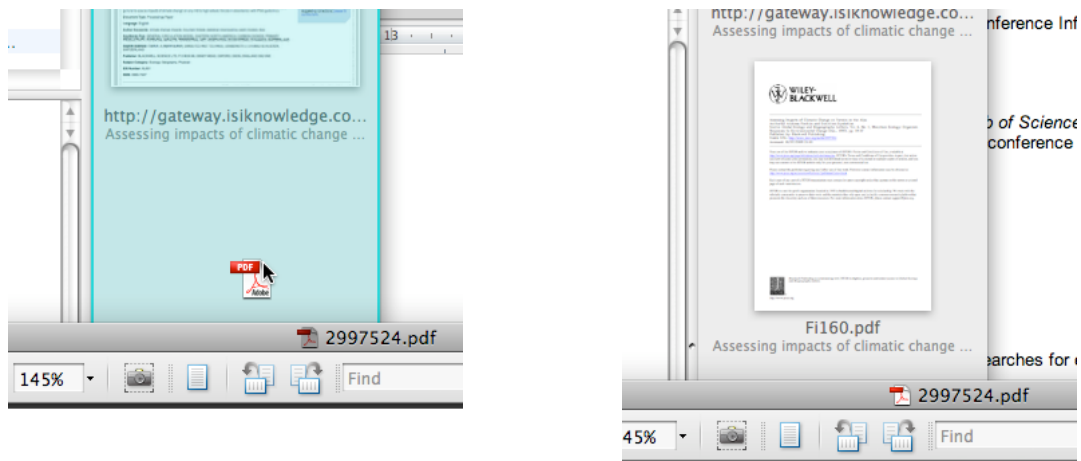
It gets you to the JSTOR repository of the paper



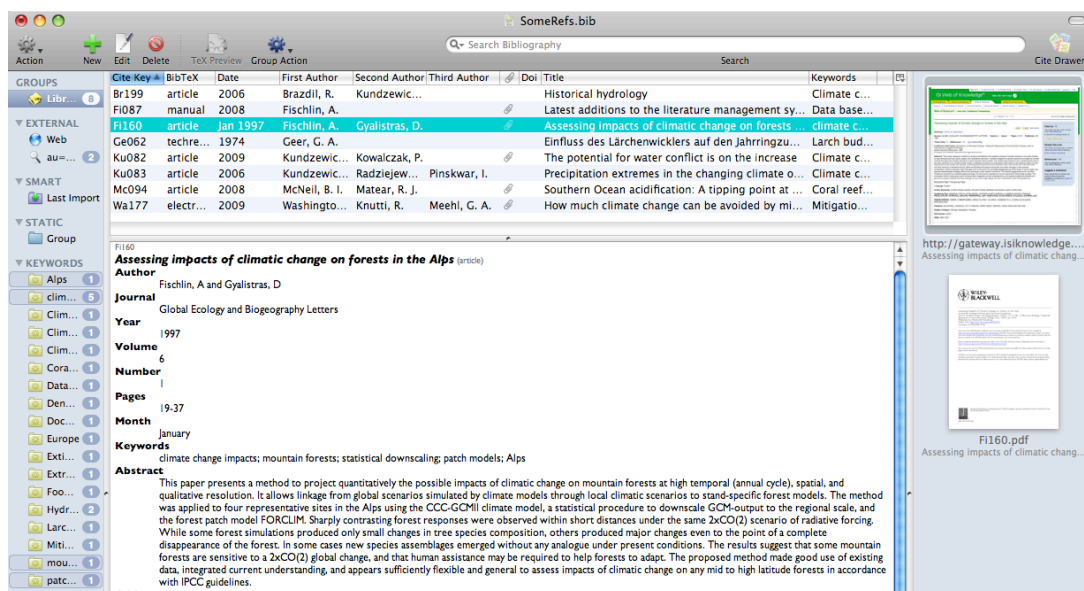
<sup>70</sup> You may easily create a new main key by simply choosing menu command “Publication -> Generate Cite Key” (Cmd-K). However, you should refrain from wasting codes and refrain from using this command unless this becomes a necessity to avoid conflicting cite keys.



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>71</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).

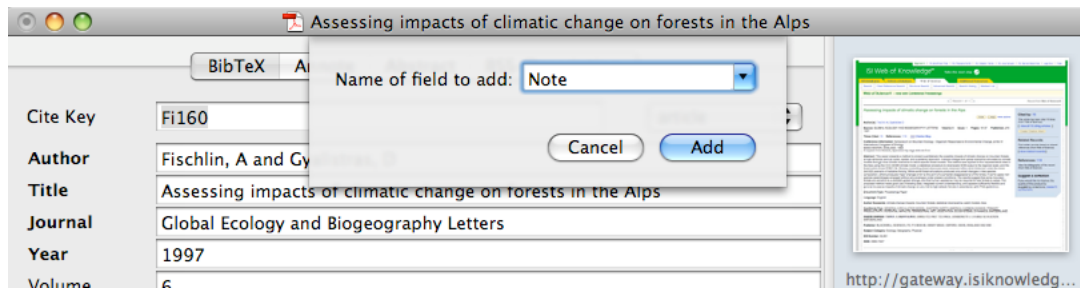


You are now done if your preference settings “File papers automatically” is checked, because the pdf was renamed to ‘Fi160.pdf’ and filed to the wanted location where you keep your pdf’s. Otherwise choose menu command “Publication -> AutoFile Linked Files...” (Cmd-Shift-K) and the file is also renamed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

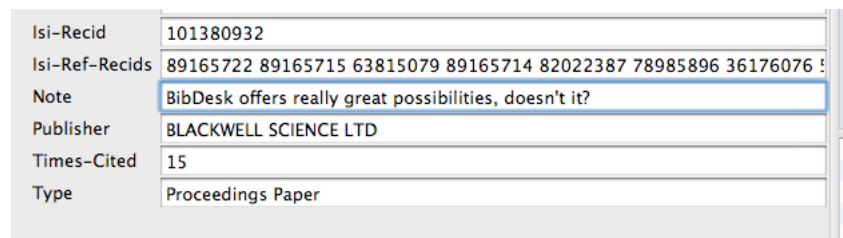


<sup>71</sup> This convenient method is NOT available if you have not prevented the intrusive Adobe Reader plug-in be used in your browsers. I recommend to always turn this feature off, by setting the internet preferences in Adobe Reader (or Acrobat) such that check box “Display PDF in browser using: 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.

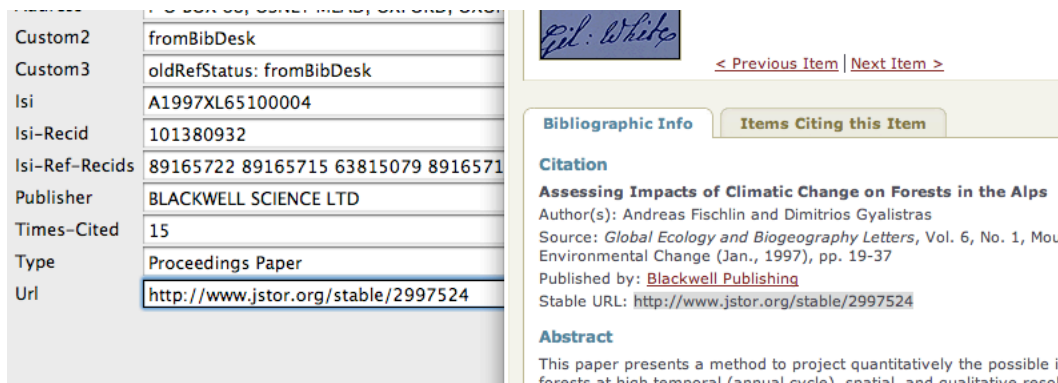
Let's do something more technical, i.e. editing the record. First you may wish to add some comments. Hit return or double-click the record to open it for editing. See, the standard *BibTEX* field *note* is missing. Add it by clicking onto the + in the lower left corner and enter the field's name similar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



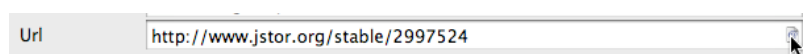
And then enter your comments



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:



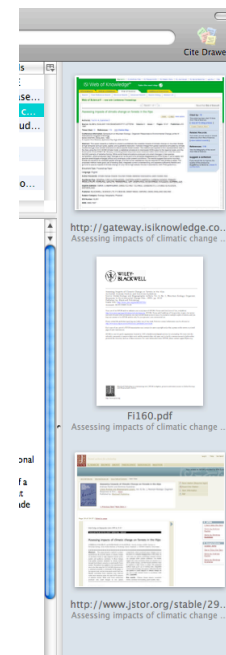
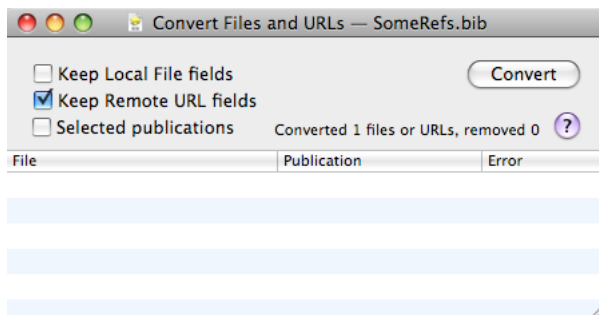
Save your data by choosing command "File -> Save" (Cmd-S). Notice the little DOI symbol to the right of the new field *Url*?



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

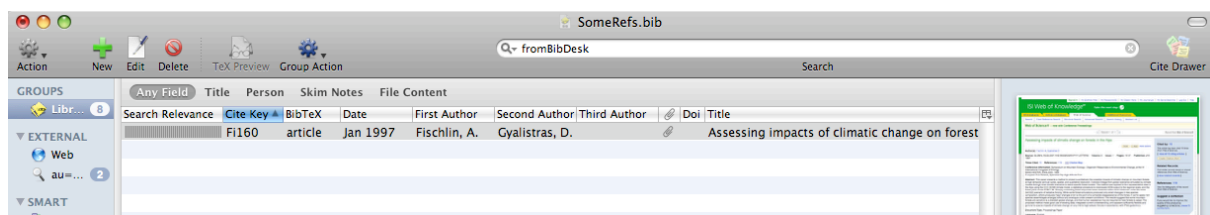
However, the nifty jump button was available only while editing the record! Of course we could add the column *Url* to the standard list view as we have done for the DOI in order to be

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: We issue the menu command “Data base -> Convert File and URL Fields” and click on the 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 the above. 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>72</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



<sup>72</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.

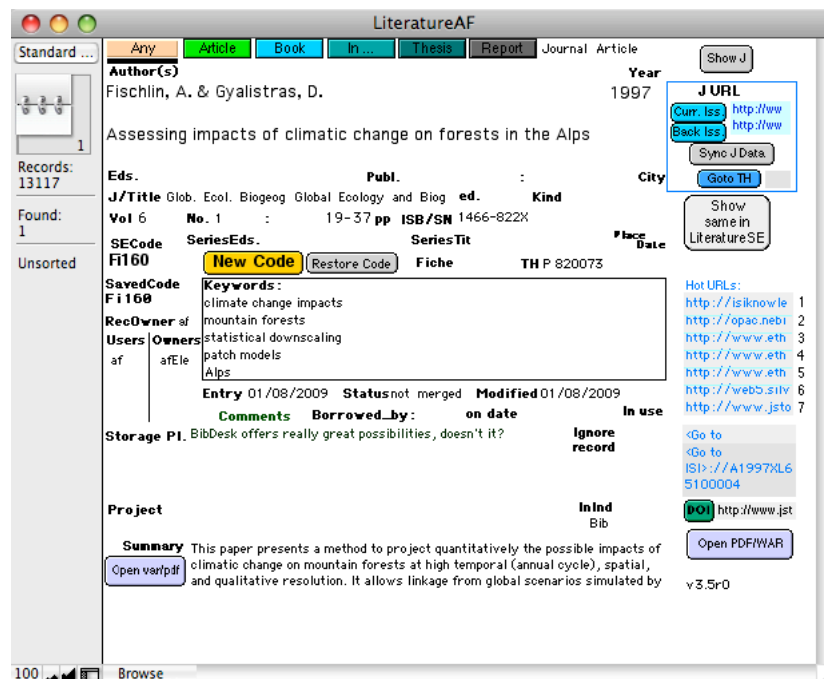


and all records that were acquired from within *BibDesk* are shown. Note, each time you generate a new cite key for a record, the phrase “fromBibDesk” is added to a special field *Custom2*:

```
-----
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 between *EndNote* and *FileMaker (LiteratureMY)*»). 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>73</sup>
- DOI URLs are discarded after having extracted the DOI and stored it into the field *DOI*<sup>74</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>75</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

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<sup>73</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>74</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>75</sup> unless that URL should be redundant (e.g. with the one stored in field *DOI*) then the <Goto ISI> Link will be favored.

*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».

## 1.9. Using BibDesk

*BibDesk*<sup>58</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>59</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 used by *LiteratureMY* will be made available to *BibDesk*<sup>60</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 used in *BibDesk*.

<sup>58</sup> A great open source application available from <http://bibdesk.sourceforge.net/>

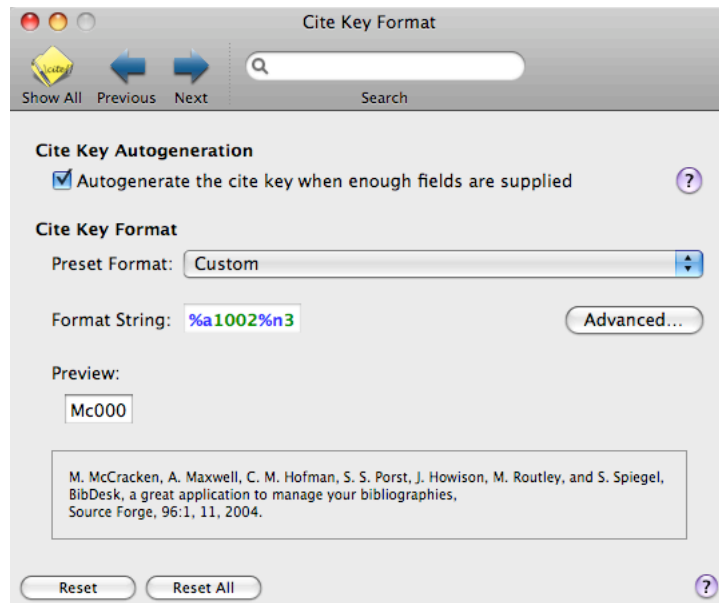
<sup>59</sup> Requires the installation of a little *BibDesk* Search file (extension '.bdssearch'). Many data base services offer now such search files. One for NEBIS, named 'NEBIS-zoom.bdssearch', is also distributed with the package *EndNote SE Add Ons...* (disk image *EndNote SE Add Ons....dgm*). 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>60</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*.

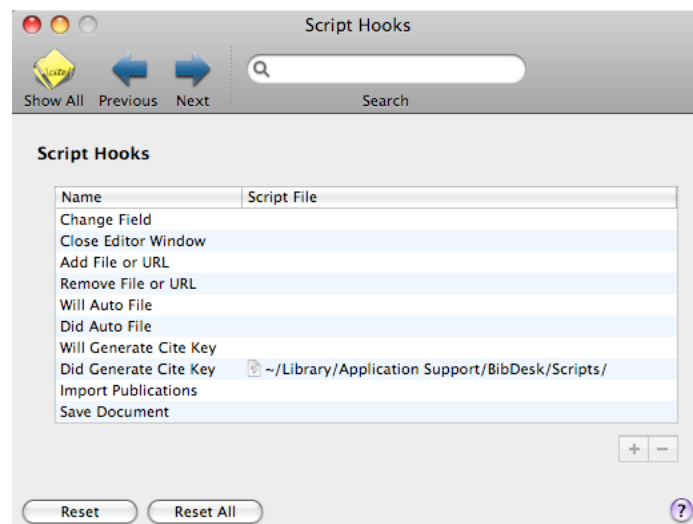
### 1.9.1 CUSTOMIZING *BIBDESK*

The main key (*SECode*, *SysEcolCode*) or *Cite Key* need to be globally unique. This is accomplished by generating a unique cite key while acquiring records. *BibDesk* supports the automatic generation of such a main key, but requires following customization to conform to the rules of the *LiteratureMY* system:

- 1) Set your *Cite Key* preferences in *BibDesk* exactly to this<sup>61</sup>:



- 3) Set your *Script Hook* preferences in *BibDesk* to this<sup>62</sup>:



Note this step requires you have copied the script '*Did\_cite\_key*' in the location given above<sup>63</sup>. Note, above settings assume you have installed script '*Did\_autofile*'

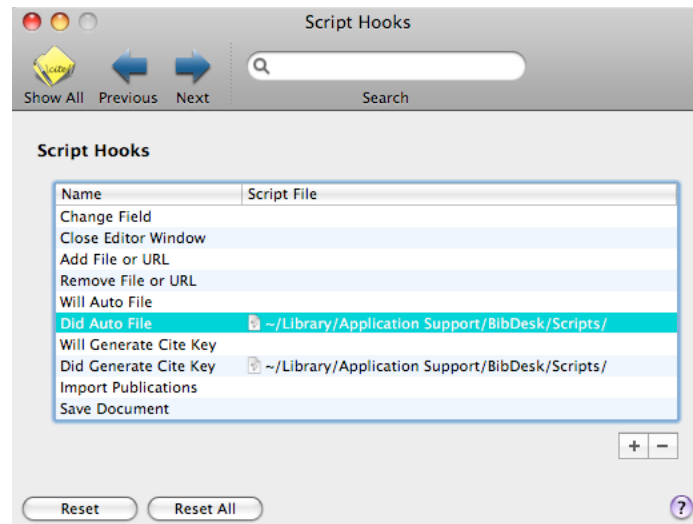
<sup>61</sup>The *Format String* specifies that the main key is to be constructed from the first 2 characters from the first author (%a1002) and then a unique number consisting of 3 digits (%n3)

<sup>62</sup>The *Format String* specifies that the main key is to be constructed from the first 2 characters from the first author (%a1002) and then a unique number consisting of 3 digits (%n3)

<sup>63</sup> Provided on distribution of package *EndNote SE Add Ons...*



as a folder action script for your pdf' depository folder (previously also called "pdfwar - Store In Letter Folder"). If that is not the case, then you should also install that very same script as a second hook for "Did Auto File" as this and make sure you have any possibly previously installed folder action script "pdfwar - Store In Letter Folder" disabled:



Try it out, which variant works better for you. This second one is recommended when you work mostly with *BibDesk*, the first is recommended if you often drop manually some pdf's onto your depository folder and you wish those being filed automatically within the proper subfolders. Having both active at the same time is not recommended and may lead to unpredictable results.

- 4) Copy the AppleScript *DumpCodesMY* to your system and run it at least once. Make sure you keep *DumpCodesMY* handy for any subsequent use. Upon successful completion you should have file *DumpOfCodesMY*<sup>64</sup> in your literature work folder<sup>65</sup>.

Now you should be ready to acquire new records from within *BibDesk* and assign them automatically a new, final main key (*SECode* or *cite key*). 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 you may be using, may they be currently open or not. 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.

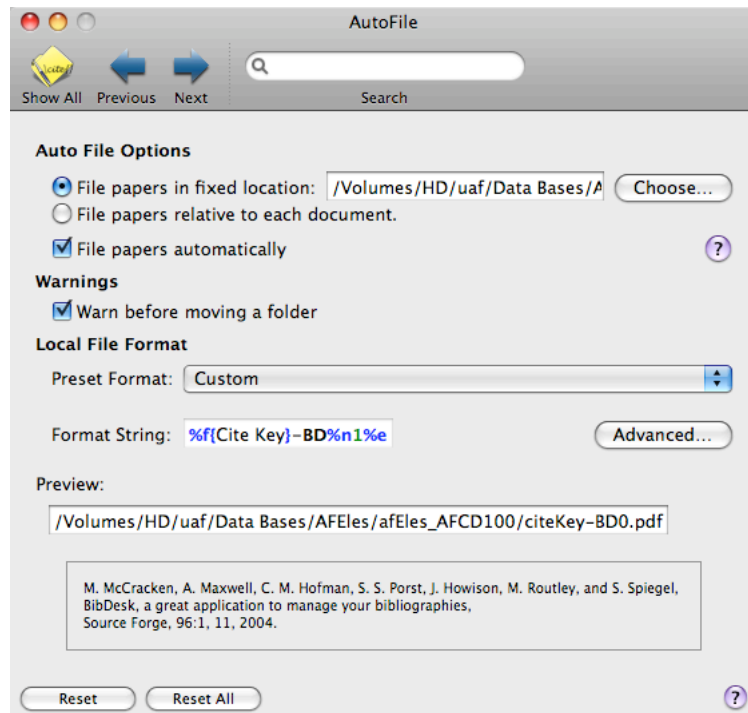
**Be warned: If you violate any of above rules you risk that incorrect main keys are assigned while adding new records!**

In case of difficulties consult also Appendix A7 «Troubleshooting hints».

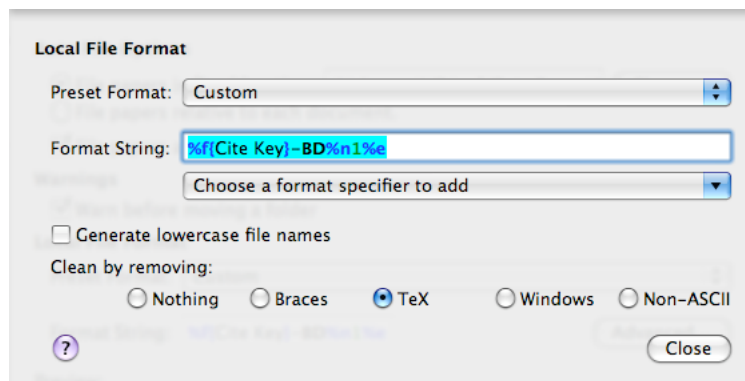
<sup>64</sup> *MY* will actually be translated to your initials as defined by shell variable *LITUSER*, e.g. *DumpOfCodesAF*. The value of *LITUSER* is assigned automatically as sourced from file *~/bin/LITMYPATH.txt* (provided with distribution of package *EndNote SE Add Ons...*).

<sup>65</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...*).

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



where the folder in which you store your pdf's needs to be specified once using button **Choose...** Choose.... You need also to use the button **Advanced...** to enter the *Format String* for local files similar to this:

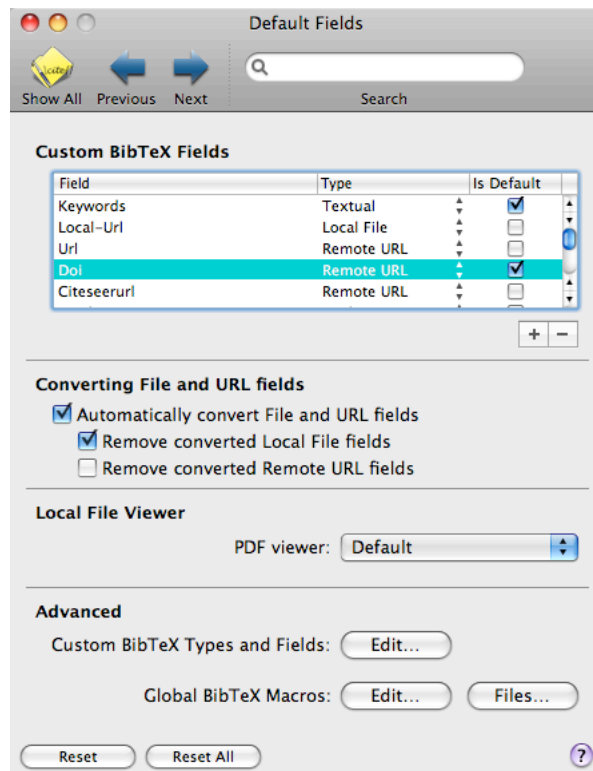


Note, if your *MY* is different from 'AF', you need also to insert into the format string your actual *MY* before the extension '%e'. Say your *MY* is 'DG', then the format string becomes: "%f{Cite Key}%n0dg%e". Otherwise don't change the format or you risk that your pdf's won't be accessible from within *EndNoteMY* or *LiteratureMY*.

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 can even be conveniently moved to the specified folder where you keep your pdf's. Moreover opening pdf's is then not only possible from within *BibDesk*, but also from within

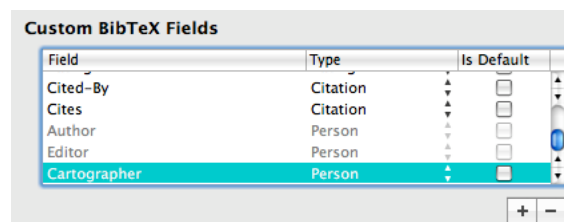
*EndNote* as well as *LiteratureMY*.<sup>66</sup> The renaming and moving of pdf's (*BibDesk* calls this feature *AutoFile*) happens automatically if you check the preference "File papers automatically"  *File papers automatically* (recommended<sup>67</sup>). Having this preference off gives you more control and you can easily accomplish the renaming and moving of the files later by issuing menu command "Publication -> AutoFile Linked Files...". Experiment and choose this preference to your taste.

6) Set your *Default 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 *BibDesk* further once you learned better how to use it.

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  symbol and enter following specifications:



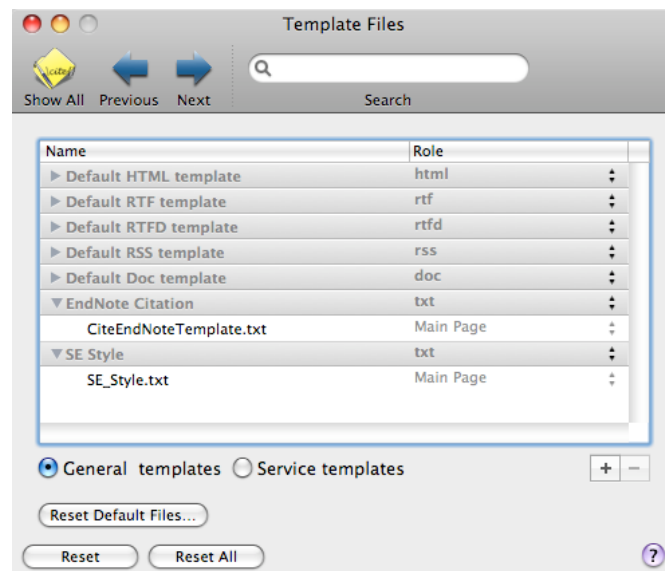
<sup>66</sup> It may be preferable to specify the same shortcut for opening pdf's in all applications as *EndNote* provides, i.e. Command-Option-P by defining this very same keyboard shortcut in the *System Preferences* pane *Keyboard & Mouse* for *FileMaker* as well as *BibDesk*.

<sup>67</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.

I highly recommend to automatically convert added files and URLs, i.e. to have “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. Concerning files, I see no need to keep upon conversion the rather confusingly named field *Local-Url*, which is used during imports to specify path and names denoting local pdf’s. However, I personally prefer to keep the old-fashioned fields *Url* and *Doi* intact upon conversions. But you may prefer to check even that option “Remove converted Remote URL fields”. As a result any possibly present field *Url* and *Doi* will not only be converted and appear on right side pane, but those fields are also removed as redundant from the record. Thus, set it to your liking (more can also be learned in the next section «A short *BibDesk* tutorial»).

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

7) (optional) Set your *Template Files* preferences in *BibDesk* to this:

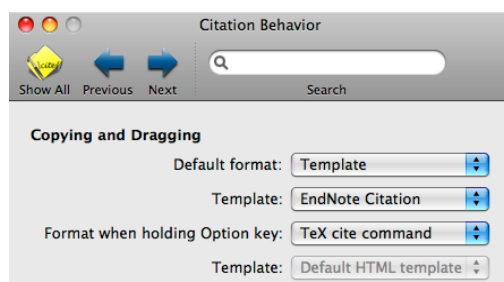


after having copied the template<sup>68</sup> files *CiteEndNoteTemplate.txt* and *SE\_Style.txt* into folder ‘~/Library/Application Support/BibDesk/Templates/’. As a result you may choose menu command "Edit -> Copy As" with the template *EndNote Citation* to get exactly an *EndNote* conformant temporary citation in your clipboard, which you can paste e.g. into a 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* in the *System Preferences* pane *Keyboard & Mouse* for *FileMaker*, following the technique as described in section «New helper scripts».

<sup>68</sup> provided with distribution of package *EndNote SE Add Ons...*

8) (optional) Set your *Citation Behavior* preferences in *BibDesk* 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!



## 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). Yellow highlighted are reference types of particular interest. Transfers to watch out for are highlighted in light pink. They 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 sets of reference types.

#	<i>EndNote X1</i> <sup>92</sup>	<i>LiteratureMY</i> ‡	<i>BibDesk</i> <sup>93</sup> ( <i>BibTEX</i> <sup>94</sup> )
	Aggregated Database	-	-
	Ancient Text	-	-
	Artwork	-	-
	Audiovisual Material	-	-
	Bill	-	-
	Blog	-	-
6	Book	Book	<b>book</b> <sup>95</sup>
5	Book Section	In Book	<b>inbook</b> <sup>96</sup>
	Case	-	-
	Catalog	-	-
	Chart or Table	-	-
	Classical Work	-	-
9	Computer Program	Tech Report	<b>manual</b>
47	Conference Paper	In Proceedings	<b>inproceedings,</b> <b>conference</b> <sup>97</sup>
10	Conference Proceedings	Proceedings	<b>proceedings</b>
	Dictionary	-	glossdef
28	Edited Book	Edited Book	<b>book</b> <sup>98</sup>
43	Electronic Article	Electronic Article <sup>99</sup>	<b>electronic</b>

<sup>92</sup> The table actually also lists reference types contained in *EndNote X2* and *EndNote X3*. Those are highlighted with a light brown.

<sup>93</sup> *BibDesk* is an open source application available from <http://bibdesk.sourceforge.net/>

<sup>94</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* (as of this writing Version 1.3.21 (1525))

<sup>95</sup> In this case a *BibTEX* field *author* instead of *editor* should be present in the record

<sup>96</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 *incollection* 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. Even *BibTEX* users may sometimes map *incollection* to *EndNote*'s *Book Section* (e.g. *BibDesk* Version 1.3.21 (1525) *EndNote XML* export), while our system always keeps the two cases clearly separate by mapping *incollection* exclusively to the SE custom *EndNote* reference type *In Edited Book* (Unused 1). To avoid data loss in case of this mistake, however, SE custom *EndNote* reference type *In Book* does tolerate a field *Editor*.

<sup>97</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 it and I recommend against its use.

<sup>98</sup> In this case a *BibTEX* field *editor* instead of *author* should be present in the record

	Electronic Book	-	-
	Encyclopedia	-	-
	Equation	-	-
	Figure	-	-
	Film or Broadcast	-	-
13	Generic	Miscellaneous	<b>misc</b>
13	Generic	Booklet	<b>booklet</b>
	Government Document	-	-
	Grant	-	-
	Hearing	-	-
17	Journal Article	Journal Article	<b>article</b>
	Legal Rule or Regulation	-	-
	Magazine Article	-	-
	Manuscript	-	-
20	Map	Map	<b>misc</b> <sup>100</sup>
23	Newspaper Article	Newspaper Article	<b>article</b>
	Online Database	-	url
	Online Multimedia	-	url
24	Pamphlet	Booklet <sup>101</sup>	<b>booklet</b>
25	Patent	Custom <sup>102</sup>	<b>misc</b>
26	Personal Communication	._103	-
27	Report	Report	<b>techreport</b>
	Serial	-	periodical
	Standard	-	-
	Statute	-	-
32	Thesis	Thesis	<b>masterthesis, phdthesis, jurthesis</b>
34	Unpublished Work	Unpublished	<b>unpublished</b>
12	Web Page	Web Page <sup>104</sup>	webpage
40	In Edited Book <sup>†</sup> (Unused 1)	In Edited Book	<b>incollection</b>
41	Edited Report <sup>†</sup> (Unused 2)	Edited Report	<b>report</b>

<sup>99</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>100</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>101</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, as of this writing *EndNote X2* has serious deficiencies relative to *EndNote X1* and I recommend strongly against its use, and *EndNote X3* is not yet available for the Mac OS X platform.

<sup>102</sup> Use reference type *Custom* in *EndNote* as a custom style you can customize freely to accommodate special needs of your publisher.

<sup>103</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.

<sup>104</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>†</sup> Edited reference type

42	Edited Articles <sup>†</sup> (Unused 3)	Edited Articles	<b>proceedings</b>
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## 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 X1</i> <sup>105</sup>	Field Name in <i>LiteratureMY</i> ‡	Field Name in <i>BibDesk</i> <sup>106</sup>
1	Reference Type	Ref_Type	<i>entry type</i> <sup>107</sup>
2	Author	Authors	author, Cartographer <sup>108</sup>
3	Year	Year	year
4	Title	Title	title
5	Secondary Author	Editors	editor <sup>109</sup>
6	Secondary Title	JOrPubl	journal, booktitle
7	Place Published	City	address
8	Publisher	Publisher	publisher, organization, institution, school, 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>110</sup>	-	-
22	ISBN/ISSN	ISBN	Isbn

<sup>105</sup> Names as used in the reference type *Generic* of *EndNote X1*

‡ This correspondence is valid as of this writing for *EndNote X1* (Bld 2377) and *LiteratureMY* v3.0r2 (January 2008) and later versions

<sup>106</sup> *BibDesk* supports any field names, but listed here are only those that are used by *LiteratureMY* when exporting to *BibTEX*

<sup>107</sup> Has actually no special field name and is the first identifier used in the record

<sup>108</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>109</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>110</sup> May be used for internal purposes in case of reference type *Generic*

23	DOI	DOI	Doi <sup>111</sup>
24	Original Publication	-	-
25	Reprint Edition	-	-
26	Reviewed Item	Owners	<i>Custom5</i> *
27	Custom 1	Users	<i>Custom5</i> *
28	Custom 2	Ref_Status	<i>Custom5</i> *
29	Custom 3	Entry Date	<i>Custom5</i> *
30	Custom 4	Modified	<i>Custom5</i> *
31	Custom 5	-	<i>Custom5</i> *
32	Custom 6	Custom 6	<i>Custom5</i> *
33	Custom 7	Custom_7	<i>Custom5</i> *
34	Accession Number	-	-
35	Call Number	Bibl.	<i>Custom5</i> *
36	Label	SysEcolCode	cite key
37	Keywords	Keywords	keywords
38	Abstract	Summary	abstract
39	Notes	Project, InUseFor, StoragePlace, InCrdIndex <sup>112</sup>	note
40	Research Notes	Comments <sup>113</sup>	annotate
41	URL	URL	Url (Bdsk-Url-1, -2 ...) <sup>114</sup>
42	File Attachments	pdf_pathfilename_URL	Local-url (Bdsk-File-1 ...) <sup>115</sup>
43	Author Address	-	-
44	Figure	-	-
45	Caption	-	-
46	Access Date	-	-
47	Last Modified Date <sup>116</sup>	-	-

<sup>111</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>112</sup> For legacy reasons all these fields are stored in *BibTEX* field *note* using a specific keyword

<sup>113</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>114</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>115</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](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>116</sup> Replaced by new field 'Custom 8' in *EndNote X2* and *EndNote X3* and becomes field 'Last Updated' at position 54



48	Translated Author	-	-
49	Translated Title	-	-
50	Name of Database	-	-
51	Database Provider	-	-
52	Language	-	-
53 <sup>C</sup>	Added to Library	-	-
54 <sup>C</sup>	Last Updated <sup>117</sup>	-	-

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<sup>C</sup> New field only available in *EndNote X2* and *EndNote X3*

<sup>117</sup> Former field *Last Modified Date* as used in *EndNote X1*

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

The table below shows the tags recognized in the *EndNote* Import format of *EndNote XI*, 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 included in each reference type). The Figure field is not included for importing.

Tag	EndNote Generic Field Name
%A	Author
%B	Secondary Title (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 in *EndNote* manuals is incomplete. E.g. the field *Alternate Title* is not listed, which we encode with tag %Z, since we use %O according to our tradition for field *Notes*.

See also [http://colab.mpg.de/mediawiki/PubMan\\_Func\\_Spec\\_Endnote\\_Mapping](http://colab.mpg.de/mediawiki/PubMan_Func_Spec_Endnote_Mapping)

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

Andreas Fischlin  
Terrestrial Systems Ecology<sup>1</sup>  
ETH Zurich

September 2009 - Data base version 3.5r3 or newer

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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