

The  
**PAPYRUS**<sup>®</sup>  
Bibliography System  
& Knowledge Manager

**Version 8.0 for Macintosh**

by Dave Goldman

**WORKBOOK**



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# Introduction

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## Welcome to Papyrus!

The Papyrus Bibliography & Knowledge Management System helps you maintain a permanent collection of reference citations.

If you need to locate all references on a particular topic, or track down an article you recall having read last year, you can use Papyrus to rapidly **search** your citation collection. The results can then be **sorted** and **formatted** however you like.

If you are a student, a scholar, a researcher, or the secretary of any of these, then Papyrus can also **automate the bibliographic aspects of your work**. Whenever you need to print a bibliography for a manuscript in preparation you can select the appropriate references from your collection and use Papyrus to print the bibliography in any desired format. Papyrus can work with your word processor to automatically read your manuscript, create the bibliography, and produce a final draft of your manuscript in which the in-text citations have been appropriately edited.

New references may be added to your collection at any time, and existing references can, of course, be edited or deleted. You can also **import** references from virtually anywhere—national online databases, CD-ROM bibliographic databases, monthly diskette update services, other personal bibliographic database programs, general-purpose database applications, or existing bibliographies from your word processor.

You can also attach an unlimited number of **notecards** to each of your references. Each notecard provides ample room for your comments on your reading, or quotations from the original sources. Notecards are ideal for preparing a dissertation or for summarizing a series of lengthy works. Notecards can also help you organize your own works in progress.

Papyrus lets you **link** your references to each other to indicate various kinds of connections; *e.g.*, that one reference refutes another reference, or that one work is a review of another.

The current version of Papyrus incorporates literally thousands of suggestions from our users over the past decade. We believe that Papyrus stands alone among bibliographic programs in its power and ease of use. Nevertheless, we still consider Papyrus a work in progress, and will always welcome your further recommendations.

This edition of Papyrus, Version 8.0, has been implemented on Macintosh computers running System 7 or Mac OS 8. A full Windows implementation of Papyrus Version 8 is under development—check our Web site, [www.rsd.com](http://www.rsd.com), for news. In the meantime Papyrus Version 7 for DOS continues to be available.

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## Full vs Limited Versions of Papyrus

Papyrus Version 8 is available in two editions: the **Full Version** and the **Limited Version**. The two are identical in all but a few respects.

First, the Full Version allows an essentially unlimited number of entries in your database. The Limited Version will allow you to enter **up to 200 references**.

The second difference between the two versions is that the Limited Version is **free**. You and your colleagues or students can download a copy from our Web site, **www.rsd.com**. You may also make copies of the Limited Version and distribute them to others (provided that you copy the entire Limited Version without modifications, changes, additions or deletions).

If you use Papyrus to assemble a large collection of references and your colleagues begin clamoring for their own copies of your database—or you think you could entice them to send you large sums of money for their own copies of your database—then they will also need their own copies of the Papyrus *application* in order to make use of your data files. While we do like to think that all of your colleagues will rush out and purchase their own copies of Papyrus, the Limited Version can serve as an interim solution. A *legal* interim solution.

When someone uses the Limited Version to access a database containing more than 200 references, the database will be opened in **read-only** mode. This means that they can review all the information already in the database, but they cannot make any changes or additions.

So when you provide copies of your Papyrus database to your colleagues, you can simply include a copy of the Limited Version of Papyrus along with your database files.

Of course, Research Software Design's usual unlimited **technical support** is available only to those of you who purchase the Full Version of Papyrus.

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## Our Ridiculously Reasonable License Policy

We recognize that many of you will need to access your bibliographic database on more than one computer. Perhaps one at work and another at home, or one on a researcher's desk and another on a secretary's. So rather than restrict the number of **computers** on which you can use this copy of Papyrus, we license the program based on the number of **distinct Papyrus databases** you use, regardless of how many different computers or people are accessing copies of the same database.

For full details of our license policy, as well as some Site License options, please refer to the *License Agreement* section.

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Thank you!

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## Overview of the Papyrus Documentation

Different people learn best in different ways, so we have provided you sufficient materials for more than one approach to learning Papyrus.

There are three main parts to the Papyrus documentation: *WORKBOOK*, *CONCEPTS*, and *REFERENCE*. The *WORKBOOK* takes a tutorial, task-oriented approach. One chapter, for example, leads you step by step through the process of entering references into Papyrus. Another walks you through the steps of searching your database for a particular set of references and then printing them. Using Papyrus with your word processor to assemble a bibliography for a manuscript is the task reviewed in a later chapter.

The *CONCEPTS* section explains several fundamental ideas that, sooner or later, you need to understand in order to work with Papyrus. Some of these may already be familiar to you from work with other computer programs, while others are specific to Papyrus.

Finally, the *REFERENCE* section contains a detailed review of each Papyrus feature.

If you like to jump right into new software, then turn to the *WORKBOOK*. The first few chapters will help you master basic Papyrus operations—you can later work through the more advanced chapters as you need them. When you require more detailed information on a particular feature, the *WORKBOOK* will refer you to the appropriate chapter of the *REFERENCE* section. And sooner or later you should take the time to review the *CONCEPTS* section to ensure that you are not missing any important ideas.

On the other hand, maybe you prefer a solid understanding of what this program is going to do with your valuable information before you start giving it free rein. Then you should start with *CONCEPTS*. Afterwards you will probably want to peruse at least the first several chapters of the *REFERENCE* section. At that point you should feel quite confident entrusting your data to Papyrus, understanding exactly how Papyrus will manipulate it. And when you later need to accomplish a particular task for the first time, you can turn to the appropriate chapter of the *WORKBOOK*.

Of course, there are some people who can only absorb difficult information directly from another human being. Unfortunately, Research Software Design lacks the resources to provide you with a personal Papyrus tutor. But if you find yourself stymied despite all of our documentation, then please contact us.

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Basically, you may distribute copies of the Limited Version to anyone who would like to try it out. But since we *are* hoping to make a few bucks here, you may *not* distribute the Full Version.

Research Software Design will only provide full technical support for those of you who purchase your own Full Version.

Just to be sure that you're paying attention here:

**You *may* distribute copies of the *Limited* Version of Papyrus.**

**You may *not* distribute copies of the *Full* Version of Papyrus.**

Got it?

Next important point:

**Your purchase of a Full Version entitles you to up to four (4) distinct databases.**

Two databases are “distinct” if they contain **independently maintained reference collections**. Allow me to explain.

First, you may keep as many Papyrus databases as you like on a **single personal computer's** hard disk(s) or on its collection of floppy disks, Zip disks, or other media. All of these databases together constitute a **single** “distinct” database for our purposes here.

The preceding paragraph does not apply to either a **network of computers** nor a **multiple-user fileserver or minicomputer**. In these situations, each and every Papyrus database is considered a distinct database.

Second, if you make a copy of your database and bring it to a second computer for your own use—*e.g.*, you want a copy of the same data on both your work computer and your home computer—the copy does **not** count as an additional distinct database. Similarly, if a principal investigator purchases Papyrus, then **the same database** may be copied to several computers within the research group, and still be considered only a single distinct database.

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Of course, in these situations we give you permission to copy the Full Version of the Papyrus *application* to each of these computers as well.

Note that your entitlement to four distinct databases does **not** mean that you get one, your sister gets one, and two of your fellow graduate students each gets one. **All four databases must be used by you or your employees/staff/students.**

Most of you will actually have only **one** “distinct” database, whether it is used by a single person or by an entire research group—the point in these situations is that each of the computers has a **copy** of the **same data**. However, if Papyrus is purchased by, say, a university department, then each research group in that department will presumably have its own distinct database. In this case you will probably soon exceed the limit of four distinct databases.

**If you plan to have more than four distinct databases, you must purchase a Site License from us.**

A Site License costs **\$200**, in addition to your initial Papyrus purchase price. (Local resellers may add an additional service charge.) Once you have paid this one-time fee, you may maintain a total of up to **twenty (20)** distinct databases, provided that all of them are used by the Registered User or his/her/its employees/staff/students.

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# Workbook

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*To sum up all; there are archives at every stage to be looked into,  
and rolls, records, documents, and endless genealogies—  
In short, there is no end of it.*

—Laurence Sterne, *Tristram Shandy*

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CHAPTER 1

## Creating a Fresh Papyrus Database

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Status window .....	W6
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See Also.....	W8

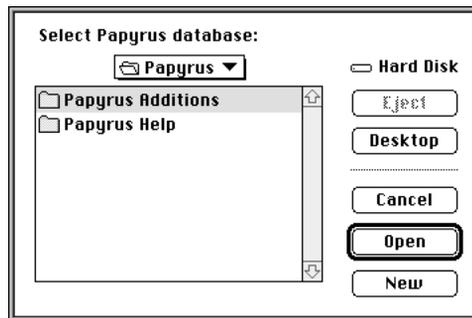
---

## Your First Database

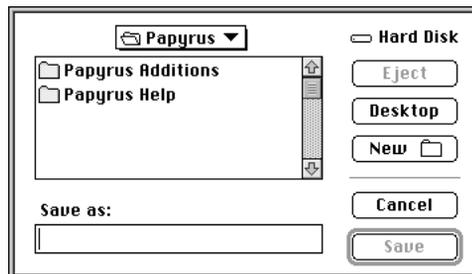
If Papyrus has not yet been installed on your computer, turn to the *Installing Papyrus* and *Launching Papyrus* chapters in the REFERENCES section. After you have installed and launched Papyrus, return here.

---

When you launch Papyrus you will be greeted with a dialog looking for your Papyrus database:



Click the **New** button and the dialog will change to this:



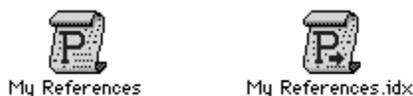
Now type in whatever name you would like to give your database. For example, you might enter something rather generic, such as My References. Or perhaps you would prefer something a bit more specific, such as Sally's Dissertation.

Whatever name you use, you can always change it at a later date. So you needn't be overly creative at this point!

Now click the **Save** button.

---

Papyrus will create two documents on your disk. The first is your actual database file, which will have the name you have entered. The second is a corresponding **index file**—this will automatically be given the same name plus .idx:



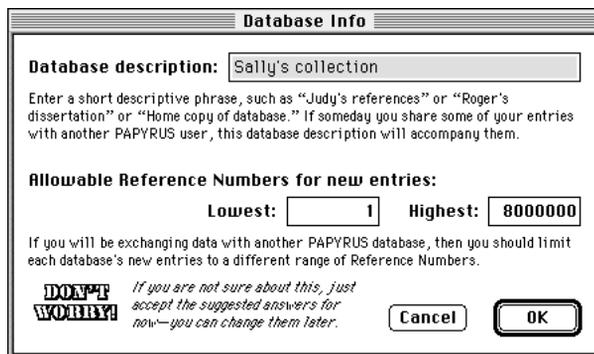
Any time you wish to copy your database—to make a back-up copy, for example—be sure to copy *both* of these documents.

Actually, should you ever lose your .idx file Papyrus can build a replacement for you. But for a large database this will be time-consuming.

In the future you can launch Papyrus by double-clicking either of these icons.

## Database Info

Now that you have created a fresh database, Papyrus asks you to supply a **description**:



As you will see in a moment, the description you enter here will be displayed in your database's **Status window**, so if you work with more than one database you can always tell which one you currently have open.

Should you ever transfer some of your references to or from another Papyrus database, their original database description will be transferred along with them. Thus you can always tell from whose database a particular reference originated.

Each reference you enter into Papyrus is assigned a **Reference Number**. Papyrus allows Reference Numbers of up to 8 million. But if you will be sharing your work with another Papyrus

---

user, it will usually be helpful to restrict each database to a different range of Reference Numbers. That way you can exchange references without running into numbering conflicts.

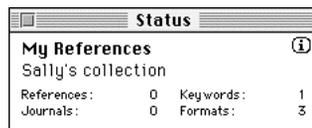
So if you are planning on sharing references among two or more Papyrus databases, you can now enter a restricted range of allowable numbers for this database.

But as the dialog indicates, *Don't Worry* about these issues. You can always come back at a later date to change the Database Description or the Allowable Reference Numbers.

Once you have entered the Database Info, click the **OK** button.

## Status window

Congratulations—you have now created your first Papyrus database. Papyrus will display your database's **Status window**:



As promised, both your database name and its description are shown. The various numbers indicate that this is a new, empty database, containing nothing but a few built-in bits of information.

If you click the **(i)** button, the Database Info dialog will reappear. Go ahead—try it for yourself.

## Additional Databases

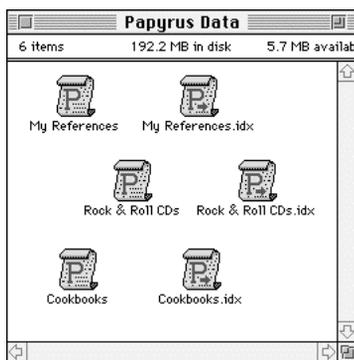
Most users of Papyrus maintain only a single database. That way all of the information with which you work is easily available in a single place.

Even if you work in two different areas of study, if there is any significant amount of overlap between your two areas you will probably still want to keep all of your references in a single database. This will obviate the duplication of references, journal names, and other information between the two databases. It will also prevent the all-too-common phenomenon of realizing that you've just spent the last hour entering fifty references into the wrong database.

On the other hand, you might be well advised to keep your research supervisor's reprint collection in a database separate from your personal collection of *X-Men* comic books.

---

Papyrus will let you create and maintain as many separate databases as you desire. Each Papyrus database is represented by its own pair of documents on your disk—the actual database file itself, plus its associated index file:



Papyrus can only work with one database at a time, so to create a new database you must first **close** the currently-open database:



Then you can open a different database or create a new one:



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## See Also...

You have now learned how to create a fresh Papyrus database. You've seen that a **Papyrus database consists of two documents**—the actual database file and an associated index file. The database has a **description**, and you can set limits on the **allowable Reference Numbers** if you will be exchanging references with other Papyrus users.

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## See also:

### CONCEPTS

*Indexes*

### REFERENCE

*Installing Papyrus*  
*Launching Papyrus*  
*Status Window*  
*Database Info Dialog*

### SHORTCUTS

*Status Window*

---

## Chapter 2

# Inputting References, Part 1

Introduction .....	W10
Reference Entry window .....	W10
An Article .....	W13
A Chapter .....	W16
A Book .....	W18
See Also.....	W20

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## Introduction

Since Papyrus's *raison d'être* is the manipulation of bibliographic references, it would probably be a good idea for us to begin this workbook by entering some references into the database. In this chapter I will present three sample references and show you, step by step, how to type them into Papyrus. In the process you will learn about many aspects of working with Papyrus. Then in *Inputting References, Part 2* we will enter four more references, exploring some more advanced concepts and techniques. In subsequent chapters we will work with these seven references to explore Papyrus's other functions.

This section assumes that you are using a freshly-created Papyrus database that does not yet contain any information. I will also assume that you have not modified any of Papyrus's initial Preferences or other settings. But if you are working with a database into which someone has already entered some references, then you will encounter differences in Papyrus's behavior from what I describe below. For example, Papyrus will not number our first entry "1" if there is already a Reference #1.

Here are the first three references we will enter into Papyrus. In the interests of fair play and equal time I have chosen one fictional example each from biomedicine (hard sciences), psychology (social sciences) and literature (humanities). Regardless of your own field you should work through all three examples, as I will use each to make different general points.

Runson,SK; Rogerstein,BT (1990): The judicious use of nitrous oxide in the treatment of Grave's disease. *New Engl. J. Med.* 182, 254-267.

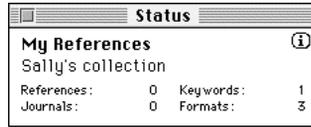
Laszlo,JA; Snooks,BB; Old,DH (1991): Unconscious punning among medical researchers. In: *Sublimation and Compensation*. Vol. 2. (Eds: Jung,CG; Old,DH) Pergamon Press, New York, 102-129.

LaFièvre,H (1992): *Why Nothing is Funny: A Deconstructionist Analysis*. 2nd ed. Harvard University Press, Cambridge.

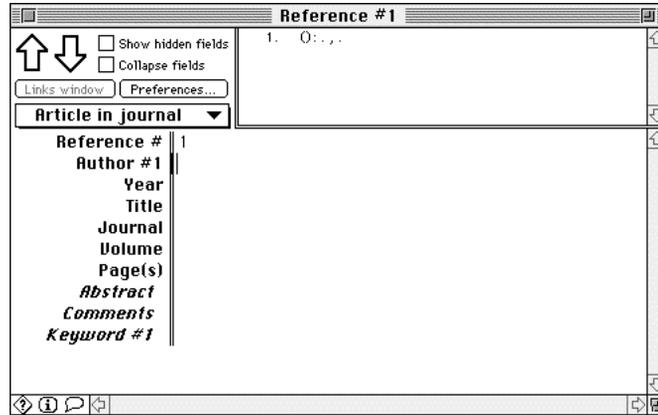
Note that all three references are shown in the Papyrus STANDARD format. This format probably presents the parts of the reference in a different order than you are accustomed to, and with different punctuation marks. We will discuss formats in subsequent chapters, so just bear with me for now.

## The Reference Entry window

To enter references into Papyrus, begin by launching Papyrus and opening your database. You should see the Status window:



Now from the **Reference** menu pick **New**. A **Reference Entry window** will appear:



Before you take any actions, let me explain a few of this window's components. (We'll get to the rest as we need them.)

### Article in journal ▼

This pop-up menu allows you to choose the **reference type**. As you can see, for a fresh Papyrus database the default setting is *Article in journal*. Feel free to click the menu to see Papyrus's other predefined reference types—but make sure you leave the setting at *Article in journal* before proceeding.

#### 1. 0:...

Papyrus displays a dynamic **preview** of the current reference. At the moment this looks a bit odd, since we haven't yet entered any information. But as we proceed you will see this preview flesh itself out.



Clicking this button brings up the **online help** for this window, using your Web browser.

Clicking this help button brings up the corresponding page in the **REFERENCE** section. Holding down the **Option** key while clicking the help button takes you instead to the corresponding **SHORTCUTS** page.



Clicking this button brings up some **information** about the current reference—when it was created, when it was last modified, whether it was entered by hand or imported from some other source, *etc.* Try clicking the information button now.

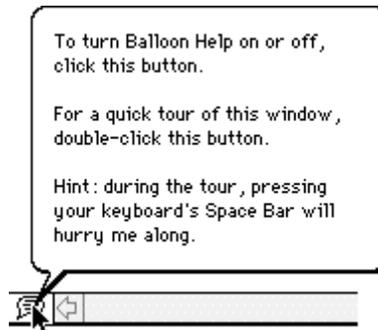


Most Papyrus windows include **balloon help**. Clicking this button turns balloon help on or off.

When balloon help is on, the button so indicates: .

Balloon help is an excellent way to quickly learn or recall what a specific window item is for. Try it now—click the balloon button to turn on balloon help, and then point at various parts of the window. When you're done, click the button again to turn off balloon help.

If you are playing along here, you will have discovered that the balloon button's own balloon describes another feature:



So give this a try, too. Double-click the balloon button and sit back to watch a sequential display of all the help balloons for this window. This is a great way to learn about the window, including things you would not otherwise have thought to click.

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## An Article

So let us enter our first reference:

Runson,SK; Rogerstein,BT (1990): The judicious use of nitrous oxide in the treatment of Grave's disease. New Engl. J. Med. 182, 254-267.

This one really *is* a journal article, so Papyrus's default reference type of Article in journal is correct. Papyrus has also suggested that this reference be given a Reference # of 1, which seems reasonable.

The caret is blinking in the Author #1 field, waiting for you to enter the first author. So go ahead and type Runson,SK, and then press Tab or Return. This is the standard way of entering names into Papyrus: **surname,initials**. If you wish you can enter full first names rather than just the initials.

You *must* enter the name with the surname first, then a comma, and then the first names or initials. There is no need to type any periods or spaces. In fact, if you do include extraneous punctuation Papyrus will remove it for you, as we shall see presently.

The *Reference Entry Window* chapter of the REFERENCE section describes further rules for entering names, as well as some useful shortcuts.

When you pressed Tab or Return a new line will have appeared for Author #2. So let us enter our second author. Just to be interesting, type her name like this: Rogerstein, B. T.—complete with spaces and periods—and then press Tab. As promised, Papyrus automatically converts your entry into its standard form.

Fear not! When later you need to output a bibliography you will be able to tell Papyrus to display the author's names in whatever form you need at the time. Because Papyrus always *stores* names in the compact way shown here, it is a simple matter for the program to add periods and/or spaces, or to put the initials in front of the surname, when *outputting* a list of references.

There are only two authors for this reference, so we will leave Author #3 blank. Just press Tab.

For the Year we must enter 1990. Papyrus assumes that most references you enter will be from the current (or nearby) century, though, so it suffices to type just 90. Try it now, then press Tab.

Of *course* Papyrus will correctly handle 2-digit year entries as we enter the 21st century. It pains me that you would think otherwise for even a moment!

Now we must provide the Title. So type this (without pressing the Return key): The judicious use of nitrous oxide in the treatment of Grave's disease. The period at the end of the title need not be entered.

As you see, when you reach the end of a line Papyrus will automatically “wrap” your text onto the next line. As with a word processor, you do not press the Return key at the end of each line,

---

but only at the end of the whole field. So now press Return or Tab to move on to the Journal field.

This reference is from *New Engl. J. Med.*, which stands for the *New England Journal of Medicine*. Type *New Engl. J. Med.* (including the periods this time) and press Return.

Because no journals have yet been entered into your database, Papyrus does not recognize this abbreviation. So up pops this dialog:

The screenshot shows a dialog box titled "New Journal". It contains the following fields and controls:

- Full Journal Name:** An empty text input field.
- Standard Abbrev.:** A text input field containing "New Engl. J. Med."
- Call Number:** An empty text input field.
- ISSN:** An empty text input field.
- URL:** An empty text input field.
- Comments:** A large empty text area with vertical scroll arrows on the right side.
- Routinely cite:** A section with three unchecked checkboxes:  Issue,  Day/Month, and  Series.
- Buttons:** Three buttons at the bottom right: "New", "Cancel", and "Done".

Here we are being asked to provide both the full name of the journal and its official abbreviation. The abbreviation we entered has already been filled in for us, so we need only type *New England Journal of Medicine* in the Full Journal Name box. Go ahead and do that.

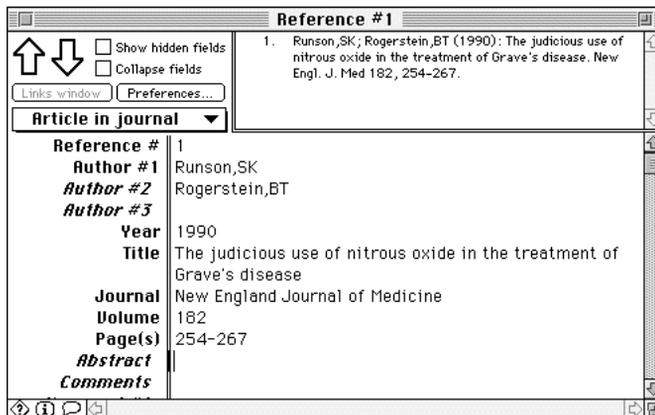
In addition to the full name and standard abbreviation for this journal, if we wished we could enter several other pieces of information. Some of these might come in handy in the future when looking for a particular issue of the journal in your library or on the World Wide Web.

Since I don't have any of this information handy right now, we'll leave these fields empty. You can always edit this journal entry in the future should you wish to provide the **Call Number**, **URL**, *etc.*

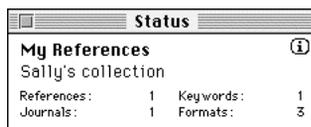
We are also offered three checkboxes regarding extra data that are to be routinely included in any citation to this journal. For the **New England Journal of Medicine** each of these should be left unchecked. When a reference cites this journal there is no need to indicate the issue number or the exact date, because the volume and page numbers by themselves are sufficient to identify which 1990 issue we need. There are other journals, though, that start each issue's page numbers over again with Page 1; for those journals a bibliographic citation needs to include either the issue number or the day and month so that the reader can find the appropriate issue in the library. For a further discussion of these concerns, you will want to read the *Journals* chapter in the **CONCEPTS** section.

Click the **Done** button. The New Journal dialog will disappear, and we'll be back to our Reference Entry window.

Now enter 182 for the Volume, and 254-267 for Page(s):



We have now finished entering the data for our first reference. We have no abstract, comments, or keywords to provide, so we will leave those fields blank. Our final task is to save our work. So go to the **Reference** menu and choose **Save**. Papyrus will save this reference, adding it to your database. The Status window will update itself accordingly:



If we had no more references to enter you would now close the Reference Entry window. But since we still have two more to go, click the window's  button. Clicking this button means "Take me to the next reference in the database"—since you are already at the final reference, Papyrus will ready itself to accept a new entry.

---

## A Chapter

Now let's enter the second of our three references:

Laszlo,JA; Snooks,BB; Old,DH (1991): Unconscious punning among medical researchers. In: Sublimation and Compensation. Vol. 2. (Eds: Jung,CG; Old,DH) Pergamon Press, New York, 102-129.

**Chapter in book** ▼

This one is a chapter from a book, so we need to switch the reference type from Article in journal to Chapter in book. Click the pop-up menu and change its setting accordingly.

Note that the field names in the left column have changed to reflect those needed for a chapter. Go ahead and fill them in as follows, pressing **Tab** after typing in each field. Stop after you enter the first Editor.

<b>Reference #</b>	2
<b>Author #1</b>	Laszlo,JA
<b>Author #2</b>	Snooks,BB
<b>Author #3</b>	Old,DH
<b>Author #4</b>	
<b>Year</b>	1991
<b>Chapter Title</b>	Unconscious punning among medical researchers
<b>Book Title</b>	Sublimation and Compensation
<b>Edition</b>	
<b>Volume</b>	
<b>Editor #1</b>	Jung,CG
<b>Editor #2</b>	

Note the difference in the way I have capitalized the chapter title compared to the book title. In the sciences one capitalizes only the first word of an article or chapter title, but for a book title you capitalize all major words. In the humanities, on the other hand, everything gets capitalized as if it were a book title—though there *is* some controversy about which words are too minor to capitalize. For more details see *Bibliographic Conventions* in the **CONCEPTS** section.

You'll note that the book's second editor, Old,DH, is the same as the third of the chapter's authors. Although it would be easy enough to simply retype his name, I would like to take this opportunity to demonstrate a couple of things.

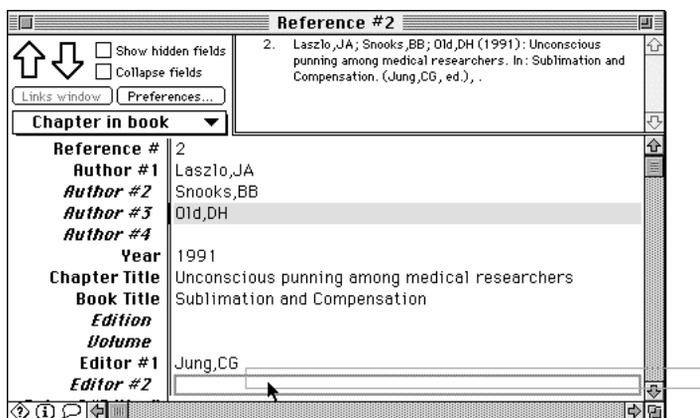
We *could* go up to the Author #3 field and **copy** the name there, and then return to the Editor #2 field and **paste** in the name. But let's be more modern and use **drag & drop** instead.

Either way, we need to select the contents of the Author #3 field. You can get there using either your keyboard or your mouse. With the keyboard, you can move up to the desired field by repeatedly pressing either Shift-Tab or the ↑ key. With your mouse, clicking anywhere in the contents of the field, Old,DH, will put the blinking caret there. Clicking the field name, Author #3, will select the entire contents of the field—which is what we want to do now.

So, one way or another, select the contents of the Author #3 field:



Now click anywhere in the selected field and **drag** it to the Editor #2 field:



When you release the mouse button, Old,DH will appear as Editor #2.

For each Editor field Papyrus will offer a corresponding Role of “Editor” field:



In a typical Chapter reference the Book’s editors are indeed simply editors. But for more interesting citations you can select whichever roles actually apply for each person.

You might wish to experiment with these checkboxes now, watching how the reference preview changes each time. When you’re done playing, return to checking only Editor for each role.

---

As you fill in the remaining fields, notice that Papyrus will allow you to enter more than one Publisher and City of Publication for those books published by more than one company, or by a single publishing company that lists more than one city:

<b>Publisher #1</b>	Pergamon Press
<b>Publisher #2</b>	
<b>City of Pub. #1</b>	New York
<b>City of Pub. #2</b>	
<b>Page(s)</b>	102-129
<b>Total # pages</b>	



After you have entered the page numbers, click  to tell Papyrus to move on to the next reference. Since we have not yet saved this reference, Papyrus will ask us if we wish to do so now:

 **Save changes to Reference #2 before proceeding?**

Click the **Save** button, and then we'll enter our final sample reference.

## A Book

Here is our final reference:

LaFièvre,H (1992): Why Nothing is Funny: A Deconstructionist Analysis. 2nd ed. Harvard University Press, Cambridge.

**Book/Monograph** ▼

This one is an entire book, so switch the reference type from Article in journal to Book/Monograph.

There is something interesting about this author's name: it contains a letter— è—that is not available on United States keyboards. Now if you are using a non-U.S. keyboard that does include this letter, you can simply type it as any other letter. But the rest of us must do something special.

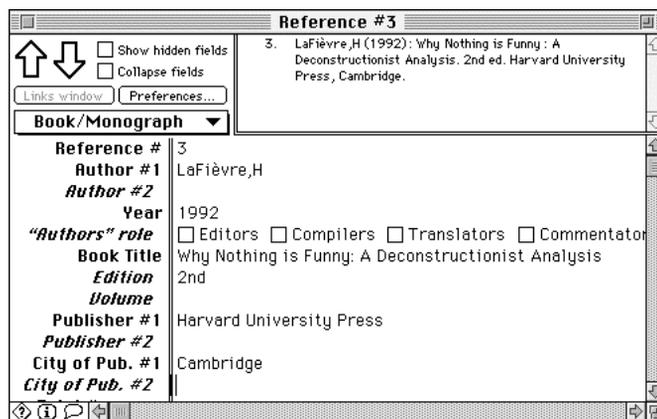
Actually, what I'm about to describe is the standard Macintosh way of entering accented letters. Unfortunately, many Mac users are unaware of it.

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Type the first four letters of the author's name, LaFi. Now hold down your Option key and press the grave accent key ( ` ) which on U.S. keyboards is located in the upper-left of the keyboard, right above Tab. Now release Option and press the e key. Voilà!

For other built-in accents, including these: é, î, ü, and ñ check the documentation that came with your Macintosh. You can also use Key Caps (from your Apple menu)—press **Option** and watch the Key Caps display carefully.

Now go ahead and complete this reference:



Those "Authors" role checkboxes are there because for some books, the "authors" are *actually* editors, compilers, translators or commentators. For example: Diem,K; Lentner,C (eds.) (1970): Scientific Tables. CIBA-GEIGY, Basle, Switzerland.

We're done with this reference, so go ahead and save it.

---

## See Also...

If you have followed along for this entire chapter, you are now well on your way toward mastering Papyrus! You have learned how to work with Papyrus's **Reference Entry window**. You have used three different **reference types** and learned Papyrus's conventions for entering **author names** and **journal abbreviations**. Finally, you have dealt with **accented letters** and Papyrus's **drag & drop** facilities.

To continue your exploration of entering references into Papyrus, proceed to the next chapter.

---

## See also:

### CONCEPTS

- Output Formats*
- Bibliographic Conventions*
- Reference Types and Fields*
- Journals*

### REFERENCE

- Papyrus Conventions*
- Reference Types and Their Fields*
- Reference Entry Window*
- Journals Window*

### SHORTCUTS

- Reference Entry Window*

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CHAPTER 3

## Inputting References, Part 2

Introduction .....	W22
Reference #4 .....	W22
Reference #5 .....	W26
Reference #6 .....	W28
Reference #7 .....	W29
See Also.....	W32

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## Introduction

In the last chapter we entered three different types of reference into Papyrus. This time we will work with four *similar* references, so that you can learn some of the shortcuts Papyrus provides during reference entry.

Here are the references:

Ramasubramanian,SR; Martin,S (1979): Eclectic neurosurgery, Part I: Excision of inhibitions. JAMA 280, 324-330.

Ramasubramanian,SR; Mull,M (1979): Eclectic neurosurgery, Part II: Implantation of healthy attitudes. JAMA 280, 331-338.

Ramasubramanian,SR (1992): Eclectic neurosurgery. In: Work Once, Publish Forever. (Ed: Perish,N) (Career Maintenance Series, Part 27) Academic Press, Chicago, 201-240.

Rogerstein,BT (1992): Nitrous oxide toxicity. In: Work Once, Publish Forever. (Ed: Perish,N) (Career Maintenance Series, Part 27) Academic Press, Chicago, 135-152.

As you can see, two of these are articles from the same issue of the same journal, and the other two are chapters from the same book. One author appears three times, and one hard-to-spell phrase—Eclectic neurosurgery—keeps coming up. You will often encounter such repetitions when working with bibliographic citations.

Let's begin entering the first of these references. If you arrived here directly from the previous chapter of the Workbook, then Papyrus will be poised for your entry. Otherwise launch Papyrus now and choose **New** from the **Reference** menu.

## Reference #4

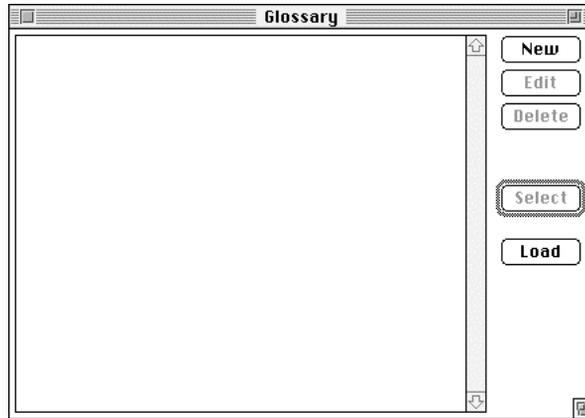
The first new reference:

Ramasubramanian,SR; Martin,S (1979): Eclectic neurosurgery, Part I: Excision of inhibitions. JAMA 280, 324-330.

is indeed a journal article, so we need not change Papyrus's suggested reference type.

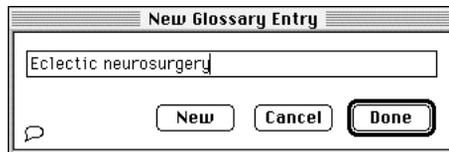
Go ahead and enter the two authors and the year. Move to the **Title** field, but before you start typing in the title let's do something that will make the rest of our work easier.

From the **Windows** menu choose **Glossary**. This will open the **Glossary window**:



The Glossary is a collection of words and phrases that you expect to use frequently. Putting a phrase into the Glossary allows you to avoid typing it over and over in the future.

So let us add our repeated phrase to the Glossary. Click the **New** button and then type in Eclectic neurosurgery:

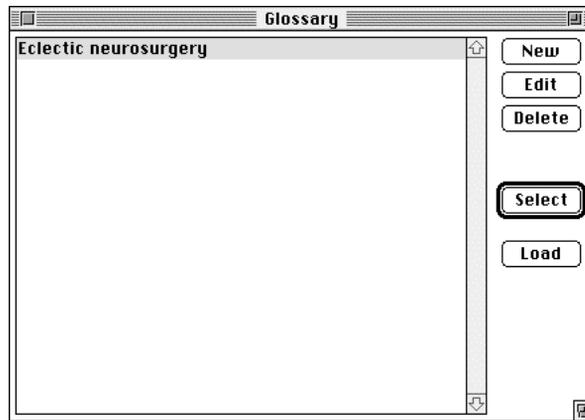


If we wished to add additional words or phrases to the Glossary we would next click the **New** button. But for now this is our only Glossary entry, so click **Done**.

As in most Papyrus dialog boxes, you can leave your hands on your keyboard here. Pressing the letter **N**, **C** or **D** is a shortcut for clicking the **New**, **Cancel** or **Done** buttons.

Of course, as in any Macintosh dialog, pressing **Esc** or **⌘-** is equivalent to clicking **Cancel**, and pressing **Return** or **Enter** is a shortcut for clicking the darkly-outlined default button.

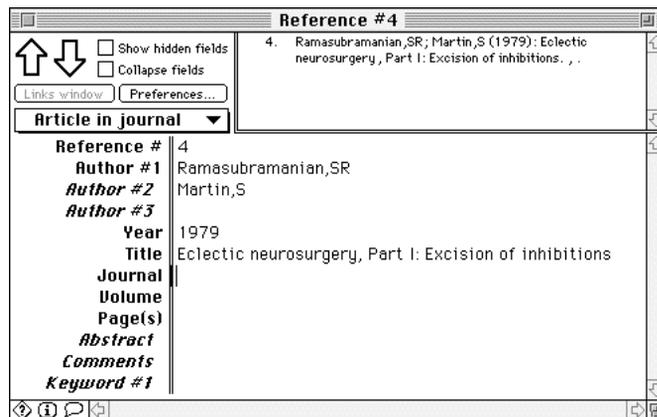
Our phrase now appears in your database's Glossary:



We can now put the Glossary to good use. Click the **Select** button (or press Return or Enter).

As you see, clicking **Select** does two things. First, it pastes the currently-selected Glossary entry into the current field of the Reference Entry window. Second, it brings the Reference Entry window forward as the active window.

Now type the rest of the title.



This reference's journal, JAMA, has the full name Journal of the American Medical Association. Type JAMA in the Journal field, and press Tab or Return. Note that since this official abbreviation is unusual in its lack of periods, Papyrus mistakenly guesses that it is supposed to be the full journal name, rather than the abbreviation. Fix this now, remembering to use Tab to move from field to field, and Enter to dismiss the dialog box when all is correct:

**New Journal**

Full Journal Name

Standard Abbrev.

Call Number  ISSN

URL

Comments

Routinely cite  
 Issue  Day/Month  Series

In its compulsion to keep your database free of all error, Papyrus asks you to confirm the unusual nature of this official abbreviation:

 "JAMA":  
Should this abbreviation really lack periods?

Click **Yes** and then finish entering the reference:

**Reference # 4**

4. Ramasubramanian,SR; Martin,S (1979): Eclectic neurosurgery, Part I: Excision of inhibitions. JAMA 280, 324-330.

Article in journal

Reference #	4
Author #1	Ramasubramanian,SR
Author #2	Martin,S
Author #3	
Year	1979
Title	Eclectic neurosurgery, Part I: Excision of inhibitions
Journal	Journal of the American Medical Association
Volume	280
Page(s)	324-330
Abstract	
Comments	
Keyword #1	

---

Now save this reference and prepare to enter the next one

You already know that you can accomplish this by clicking the window's  button. Another way to do exactly the same thing is to press your keyboard's **Enter** key. (Note: *not* the **Return** key.)

## Reference #5

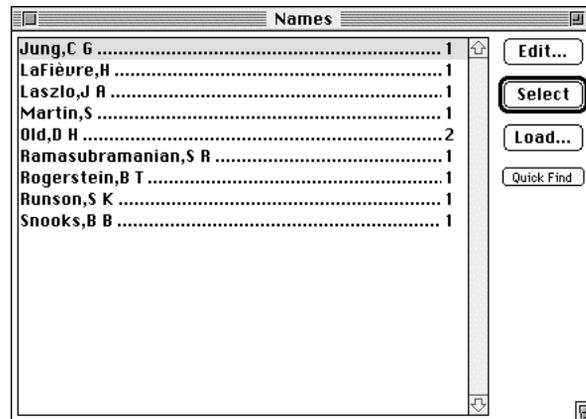
Now let's enter the next reference:

Ramasubramanian,SR; Mull,M (1979): Eclectic neurosurgery, Part II: Implantation of healthy attitudes. JAMA 280, 331-338.

Rather than typing in Ramasubramanian,SR again, go to the **Edit** menu and pick **Look up Author**.

Note the shortcut for this menu item, **⌘-L**. This key combination is going to be one of your good friends when using Papyrus.

This brings up the **Names** window:



Here we find all of the authors and editors who have so far been entered into your database. The number after each name indicates how many references include that name as an author or editor.

There are a few different ways for you to select a name in this window. Of course, you can simply click on one of the names with your mouse. You can also use your **↑** and **↓** keys to move about in the list. Finally, you can type the first few letters of the desired name.

Using any of these methods, now select Ramasubramanian,SR, and then click **Select**. As with the Glossary window, this will paste the selected name into the current Reference Entry window and also bring that window to the fore.

Now go ahead and enter the second author (Mull,M) and the year (1979).

When you get to Title, use the Glossary to paste in the starting phrase. You can bring up the Glossary window from the **Windows** menu, or you can go to the **Edit** menu and choose **Look up in Glossary**.

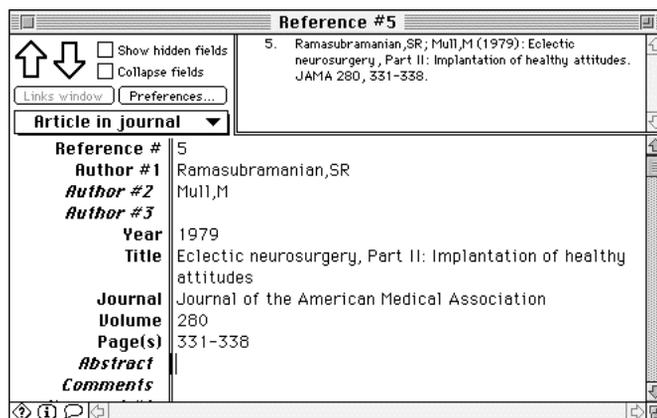
Note that ⌘-L is still the shortcut for this version of “Look up”. In general, the “Look up...” menu item changes to reflect whatever is appropriate for the current field, whether that is the Glossary, the Names window, the Journal window or the Keywords window.

After selecting Eclectic neurosurgery from the Glossary window, type in the remainder of the title.

For Journal type jama (no need to capitalize) and then press Tab. Papyrus looks through its Journal Dictionary for any entry that could conceivably be abbreviated “jama”. Since there is only one such entry, Papyrus automatically picks that one and replaces your jama with the official name.

We could have instead used ⌘-L to pick an entry from the Journals window.

Now complete this reference and save it.



---

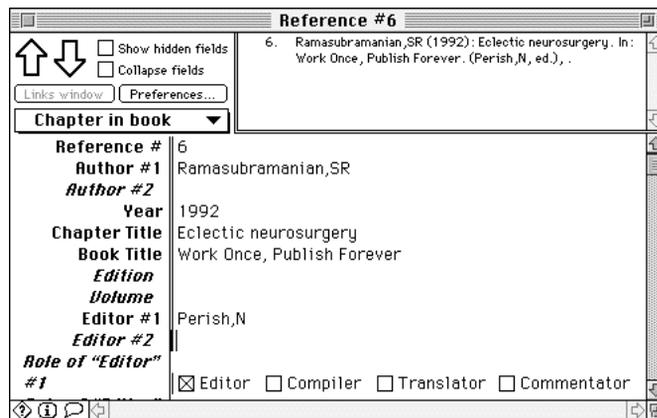
## Reference #6

Let us now proceed to the first of our two chapters:

Ramasubramanian,SR (1992): Eclectic neurosurgery. In: Work Once, Publish Forever. (Ed: Perish,N) (Career Maintenance Series, Part 27) Academic Press, Chicago, 201-240.

Begin by changing the Reference Type pop-up menu to Chapter in book.

Once again you can use ⌘-L to avoid typing Ramasubramanian,SR, and the chapter title can be plucked in its entirety from the Glossary. Continue with the book title and editor:



Now where are we going to put Career Maintenance Series, Part 27? First of all, we need to figure out what this information represents. In Papyrus terminology, Career Maintenance Series is a **Series Title**, and Part 27 is the **Place in Series**.

But these two fields do not appear anywhere in the Reference Entry window. That is because they are currently **hidden**. Papyrus actually provides places in each reference type for *many* pieces of information that you will not need routinely. But rather than clutter up your windows with a lot of irrelevancies, Papyrus keeps these hidden until you need them.

To expose all the hidden fields, click the Show hidden fields checkbox. Now you will find Series Title and Place in Series, as well as many other new fields.

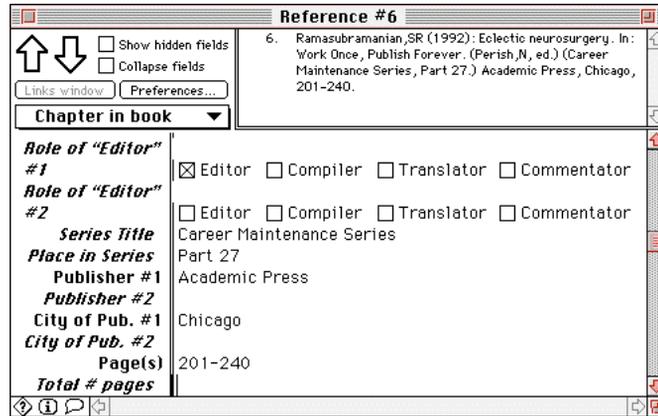
So proceed to Series Title and type Career Maintenance Series. Then enter Part 27 for Place in Series.

We do not need to use any other of the hidden fields, so uncheck the Show hidden fields checkbox. This will remove the hidden fields from your window—except for the two for which you have provided responses.

---

Papyrus allows you to decide which fields will be hidden. You may change the default settings via the **Database Settings...** choice from the **File** menu. This is useful, for example, if you wish to assign every book a Catalog Number, or provide a Location for all references.

Completing this reference is now easy:



Now save this reference—this time choose **Save** from the **File** menu, so that the current reference remains in the window after saving.

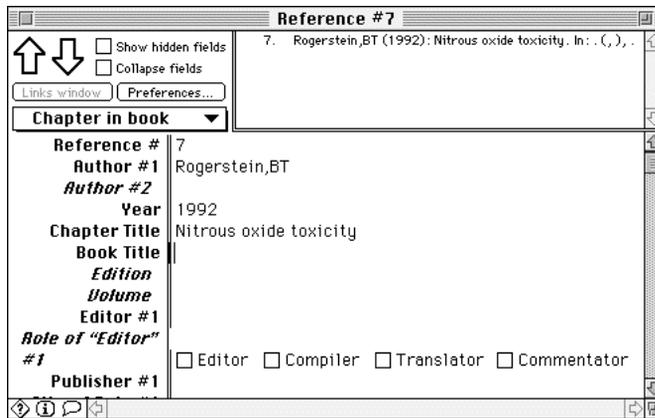
Rather than re-use this Reference Entry window for our next entry, *leave this window as it is* and pick **New** from the **Reference** menu to open a *second* Reference Entry window.

## Reference #7

One more to go:

Rogerstein,BT (1992): Nitrous oxide toxicity. In: Work Once, Publish Forever. (Ed: Perish,N) (Career Maintenance Series, Part 27) Academic Press, Chicago, 135-152.

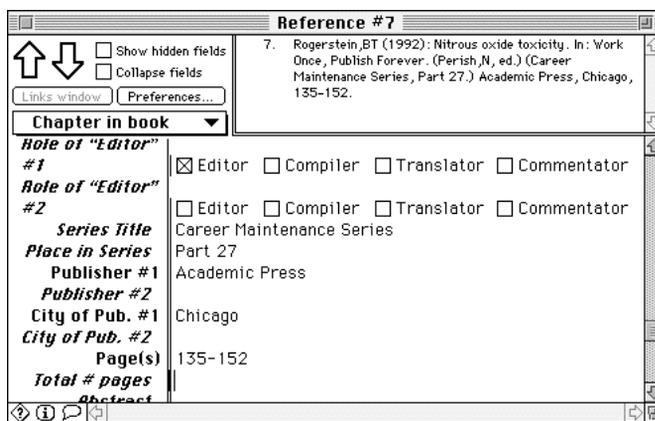
This one is a different chapter from the same book as our last entry. So in the new Reference Entry window you have just opened, begin by switching the Reference Type pop-up menu to **Chapter in book**. Then enter the chapter author, year, and chapter title:



Now, with the blinking insertion point in the **Book Title** field, go to the **Edit** menu and choose **Duplicate This Field from Reference # 6**. Papyrus obligingly pastes in the value from the same field in the other Reference Entry window. This can be a great time-saver when you have to enter a series of similar references.

Press **Tab** to accept the inserted book title and proceed to the next field.

The next shortcut is an even greater time-saver when two references are extremely similar. Try it now: choose **Duplicate Remaining Fields from Reference # 6**. Papyrus copies *all* remaining fields from the other reference (including the hidden fields). At this point you need only correct the page numbers and save the reference.



---

By the way, you have no doubt been wondering why some field names—such as **Author #1**, **Year** and **Page(s)**—appear in your window in a different text style than others—such as *Edition* and *Series Title*. Papyrus considers the former fields to be **required**; a reference lacking one of the required fields is considered **incomplete**. If you try to save an incomplete reference Papyrus will first ask you to confirm that it is indeed supposed to be incomplete, and not simply suffering from an oversight on your part. For example, if a journal article is still in press you will not be able to supply the volume and pages, so for the moment the reference really is “incomplete.”

As with **hidden** fields, you can use **Database Settings...** to specify which fields will be **required**. You might wish to make fields such as **Accession #** required, for example, if they are important for your internal use.

You can also choose the text styles used for the field names of required and non-required fields, via the **Preferences...** button in the Reference Entry window.

Once you have saved this reference, close both of the Reference Entry windows.

---

## See Also...

In this and the previous chapter you have learned *almost* everything there is to know about entering references into Papyrus. We have now discussed the **Glossary**, the **⌘-L** “Look up” shortcut, **hidden and required fields**, and **copying information from a previously-entered reference**.

The next chapter will complete our discussion of entering reference information into Papyrus.

---

## See also:

### CONCEPTS

- Bibliographic Conventions*
- Reference Types and Fields*
- Journals*
- Incomplete References*

### REFERENCE

- Papyrus Conventions*
- Reference Types and Their Fields*
- Reference Entry Window*
- Glossary Window*
- Database Settings*

### SHORTCUTS

- Reference Entry Window*

## Modifying References

Introduction .....	W34
Keywords, Part 1 .....	W36
Keywords, Part 2 .....	W37
Styles and Fonts .....	W39
Collapse fields .....	W41
Deleting a reference .....	W41
See Also.....	W43

---

## Introduction

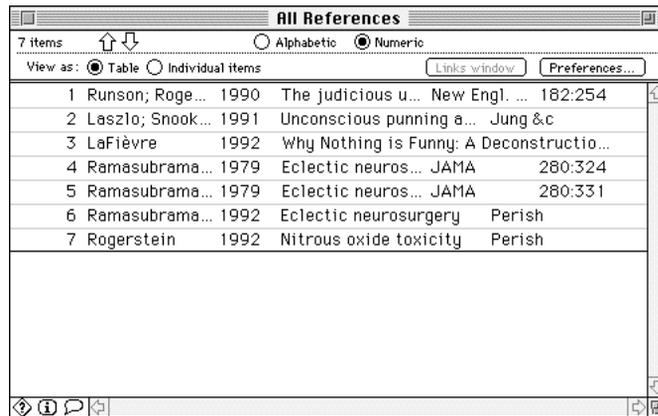
In the previous two chapters you learned how to enter references into Papyrus. In this chapter I will show you how to make changes to references that have already been entered, and how to permanently delete a reference from your database. We will also discuss the use of keywords, character formatting, and a few other tricks and shortcuts.

To begin, recall one of the articles we entered in the previous chapter:

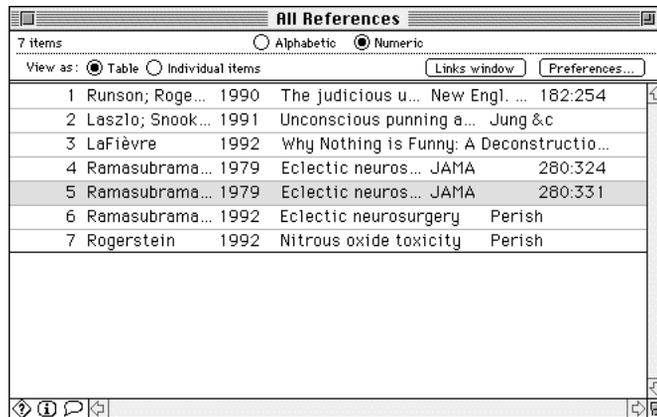
Ramasubramanian,SR; Mull,M (1979): Eclectic neurosurgery, Part II: Implantation of healthy attitudes. JAMA 280, 331-338.

It has just come to my attention that the page numbers we entered were incorrect. The correct pages are 331-348. In order to fix this mistake we must tell Papyrus that we wish to edit this particular reference.

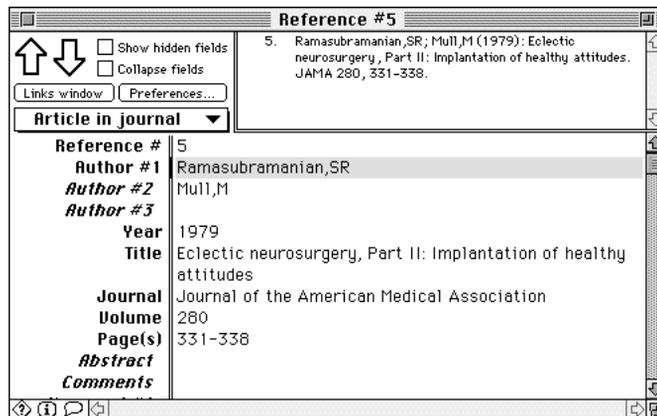
Go to the **Windows** menu and choose **All References**. The All References window will appear:



As you can see, this window displays all of the references in your database. We can see that the reference we need to edit is #5. Using your mouse or your ↑ and ↓ keys, select this reference:



Now choose **Edit** from the **Reference** menu. A Reference Entry window will open for the selected reference:



All you need do now is move to the **Page(s)** field with your mouse or arrow keys, and change 338 to 348. So please go ahead and do just that.

You could now save the modified reference. But before you do, let us add a few **keywords** to this reference.

---

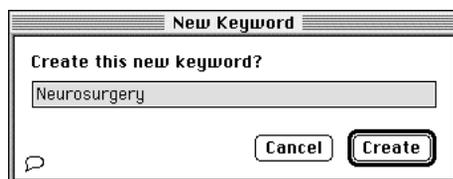
## Keywords, Part 1

You may add **keywords** to any or all of your references. While Papyrus does let you search for references based on words appearing in the title, abstract or comments fields, you will probably want to devise your own personal set of keywords as well. With these you can readily classify references into categories you find relevant and helpful.

The *Keywords* chapter in the CONCEPTS section includes suggestions on designing your keyword system. It also discusses Papyrus's distinction between **major** and **minor** keywords.

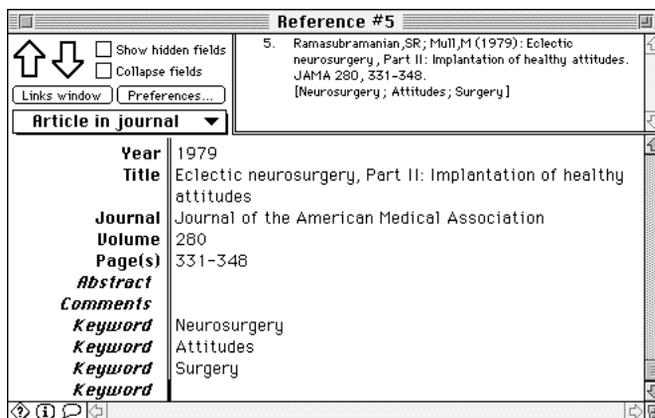
For now we will start by adding a few simple keywords to the reference on your screen.

Move to the Keyword #1 line. (You can get there in a hurry by pressing ⌘-End.) Type Neurosurgery, and press Tab or Return. Not recognizing this as an existing keyword, Papyrus responds:



This is indeed a new keyword (as opposed to a misspelling of an existing one) so click **Create** to add Neurosurgery to your Keyword Dictionary.

You can now enter another keyword on the next line. Type in Attitudes, and then Surgery as the third keyword:



Now save the reference and close the Reference Entry window.

---

## Keywords, Part 2

Let us add some keywords to another of our entries:

Rogerstein,BT (1992): Nitrous oxide toxicity. In: Work Once, Publish Forever. (Ed: Parish,N) (Career Maintenance Series, Part 27) Academic Press, Chicago, 135-152.

This is reference #6. Select it in the All References window and choose **Edit** from the **Reference** menu.

As a shortcut, you can hold down your **Option** key and **double-click** the reference.

We are going to add these three keywords to reference #6:

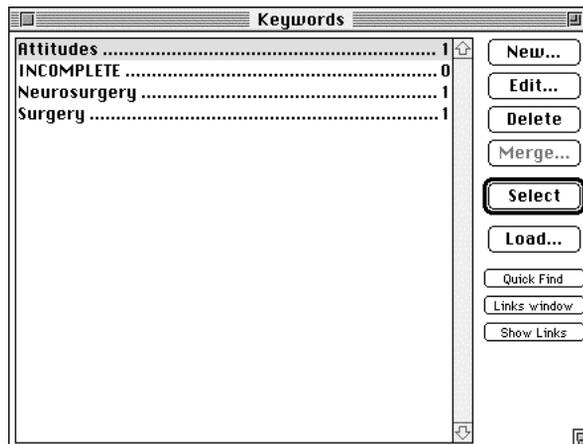
Neurosurgery  
Surgery  
Review Article

In doing so, I'll show you a few new things about keywords.

Go to the Keyword #1 field and type just the letter n. Now choose **Look up Keyword** from the **Edit** menu (or press **⌘-L**). Since Papyr us currently knows of only a single keyword that starts with this letter, it will automatically replace your n with Neurosurgery.

Press Tab or Return to open up a second Keyword field.

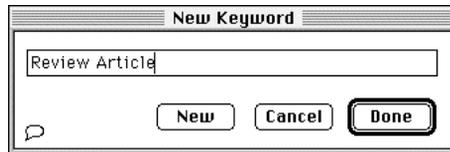
Now go to the **Windows** menu and pick **Keywords**. This will bring up the **Keywords window**:



Here we see all of the keywords currently in your Keyword Dictionary. Let's add a couple more.

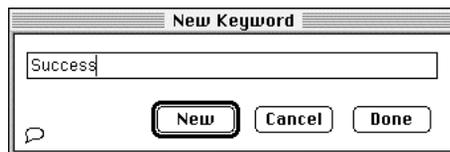
---

Click the **New** button. A New Keyword window will open. Type in Review Article:



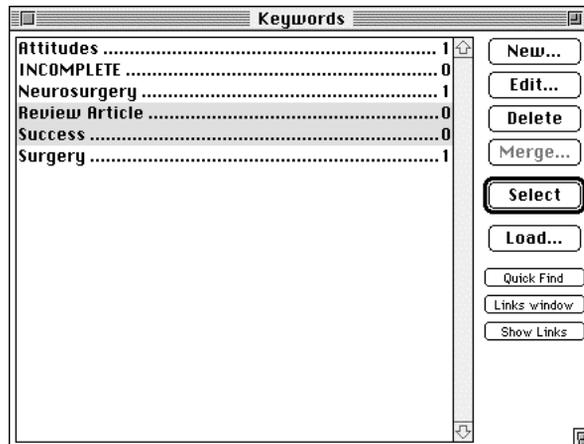
Note that a “keyword” can be a phrase, and not just a single word.

If we only had this one keyword to enter you’d now click **Done**. But we have one more keyword to add to the dictionary, so instead click **New**. Then type in this second keyword:



As Papyrus observes that we are in a keyword-entering mood, it switches the default button from **Done** to **New**. So if you had a long list of keywords to enter, you could simply press **Return** or **Enter** after each one to proceed to the next.

Click **Done**. Now you’ll be faced again with the Keywords window. The newest entry, **Success**, is already selected. Add **Review Article** to the selection by holding down your **Shift** key and clicking **Review Article**:



Now click **Select**. By this time you should be able to predict what will occur.

---

That's enough for now about keywords. But don't close this Reference Entry window just yet...

## Styles and Fonts

While we're editing this reference, let's add something to its Comments field. Move to that field and type this:

This chapter summarizes the author's work on psychic surgery over the past twenty years. Although he gravely discusses a small number of animal studies, the bulk of the work presented deals directly with *Homo sapiens*.

Note again that Papyrus takes care of "wrapping" the text to a new line when necessary; you do not press Return until the entire field has been entered.

While you're typing, you might want to experiment with a few keyboard shortcuts (all of which follow standard Macintosh conventions):

The arrow keys (↑, ↓, ←, →) do what you'd expect.

If you hold down Option while pressing ← or →, the insertion point will move one **word** at a time.

Holding down ⌘ and pressing ← or → will move you to either end of the current **line**.

Holding down Shift while using the arrow keys (with or without Option or ⌘) will **select** text.

The taxonomists amongst you will object to seeing *Homo sapiens* not italicized. Papyrus takes the standard Macintosh approach to this: select these two words with your mouse or arrow keys, and then choose *Italic* from the **Style** menu.

As you can see, in addition to the usual **bold**, **italic** and **underline**, Papyrus also offers **super-script**, **subscript** and **small caps**. So you can easily type things such as <sup>3</sup>H<sub>2</sub>O.

The small caps style doesn't come up too often—it is mainly used when creating output formats.

---

## IMPORTANT NOTE REGARDING FONTS

You will seldom use the **Font** menu while entering a reference. Nearly always you should leave this set to **BASE FONT**. Any text *entered* in **BASE FONT** can later be *output* in whatever font you desire for that particular bibliography. But text entered in any font other than **BASE FONT** will stay in precisely that font whenever the reference is later printed or exported.

If you would prefer to work in a different font in your Reference Entry windows, click the window's **Preferences...** button. You can change the font and character styles used for field names and for the values of fields.

---

One situation where you will need to change the font is when you need to use the **Symbol** font. You *can* accomplish this via the **Font** menu, but Papyrus also provides a shortcut.

From the **Edit** menu choose **Paste Symbol**. Papyrus will present you with this dialog:



Use your arrow keys or mouse to pick a symbol—it will be pasted at your current insertion point in the Reference Entry window.

Go ahead and experiment with styles, fonts and symbols. Make sure to clean up after yourself, and then we'll continue to work with this reference just a bit more.

---

## Collapse fields

Before you save your changes to reference #6, let me show you one last thing. Click the **Collapse Fields** checkbox. Now if **Comments** is the active field, this action will have no visible effect. If so, then move to another field and watch what happens to your **Comments**.

“Collapsing” fields means that apart from the currently-active field, all field values will be reduced to their first lines only. As you move into a field, though, it immediately expands to reveal its full self. If your references typically include lengthy titles, full abstracts and long comments, then checking **Collapse fields** may make your window easier to read and navigate. It is entirely up to you whether you ever invoke this feature.

Note that **Collapse fields** is independent of **Show hidden fields**.

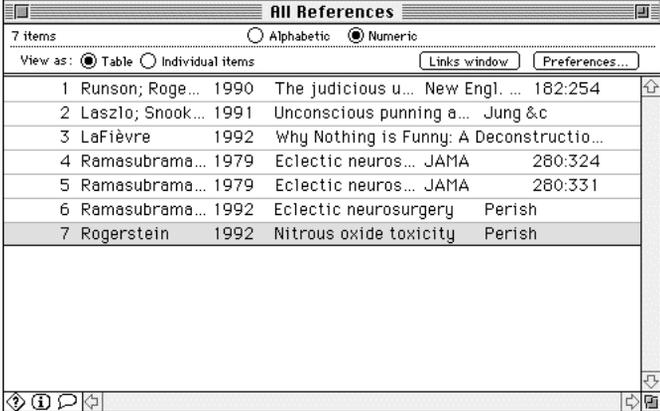
For now, uncheck **Collapse fields**. Then save this reference and close its window.

## Deleting a reference

In the Introduction to this chapter I promised to show you how to permanently remove a reference from your database. So let’s trash the Rogerstein citation we created in our previous Workbook chapter.

You should still have the All References window open on your screen. If necessary, open it now and bring it to the front of any other windows.

Select the Rogerstein reference, #7:



The screenshot shows a window titled "All References" with a table of 7 items. The table has columns for item number, author, year, title, journal, and page numbers. Reference #7 is highlighted.

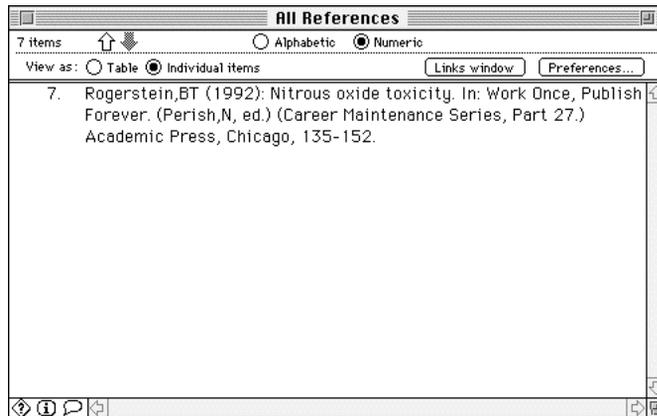
Item	Author	Year	Title	Journal	Page Numbers
1	Runson; Roge...	1990	The judicious u...	New Engl. ...	182:254
2	Laszlo; Snook...	1991	Unconscious punning a...	Jung &c	
3	LaFievre	1992	Why Nothing is Funny: A Deconstructio...		
4	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:324
5	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:331
6	Ramasubrama...	1992	Eclectic neurosurgery	Perish	
7	Rogerstein	1992	Nitrous oxide toxicity	Perish	

---

Before we consign this work to the dustbin of intellectual history, let us give it one last perusal. While we *could* examine the reference by opening it in a Reference Entry window, there is a quicker way to examine a reference without making any changes to it. Namely, we can switch the All References window from showing us this table of *all* the references to instead displaying just a *single* reference:

View as:  Table  Individual items

Go ahead and click Individual items and observe the results:



If you wished to examine other nearby references, you could use your ↑ and ↓ keys, or (equivalently) click the ↑↓ buttons at the top of the window.

When you're done exploring these new abilities, return to reference #7. You can be in either the Table or the Individual items view for what we're about to do.

From the **Reference** menu, pick **Delete**. Because this is such a serious and irrevocable action, Papyrus will ask you to confirm that you really do intend to permanently remove this reference from your database:



I don't know about you, but I feel no great attachment to Rogerstein's efforts. Go ahead and click **Delete**.

---

## See Also...

You have now mastered virtually all of the techniques needed to enter references into Papyrus, correct mistakes, make emendations, and remove extraneous citations. You have also been introduced to keywords, and learned about using character styles and fonts.

But don't be *too* proud of yourself just yet. There are plenty of fine points and shortcuts lurking in the Reference Entry and All References windows. Sooner or later you will want to review the REFERENCE and SHORTCUTS chapters indicated below.

Subsequent chapters will address various ways of making use of all this bibliographic information you have typed in.

---

## See also:

### CONCEPTS

*Reference Types and Fields*  
*Keywords*

### REFERENCE

*Papyrus Conventions*  
*Reference Types and Their Fields*  
*Reference Entry Window*  
*All References Window*  
*Glossary Window*  
*Database Settings*

### SHORTCUTS

*Reference Entry Window*  
*All References Window*

---

## Printing and Exporting Your References

Introduction .....	W46
The Print/Export dialog .....	W46
The Layout dialog .....	W49
Sending output to your word processor .....	W51
Creating text or HTML documents .....	W53
See Also.....	W54

---

## Introduction

One of the prime uses of Papyrus is to produce lists of references, including bibliographies for your manuscripts. In this chapter I will show you how to tell Papyrus to send some or all of your references to your printer or to your word processor.

In later *WORKBOOK* chapters we will build upon the lessons you learn here.

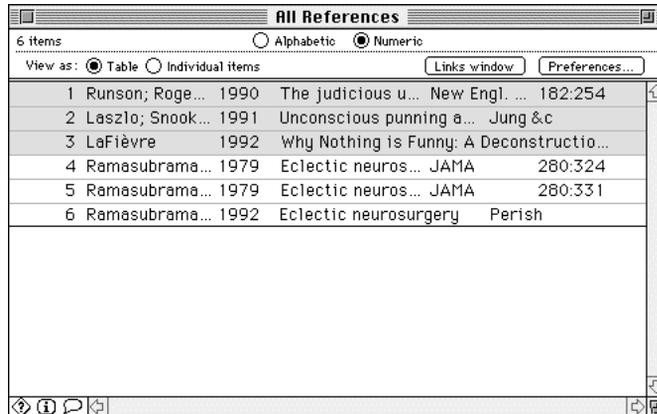
---

**The exercises in this chapter assume that your database contains the references entered in the preceding chapters on Inputting and Modifying References. If you have not entered those references, or if your database includes additional references, then some of the following exercises will yield results different from those shown.**

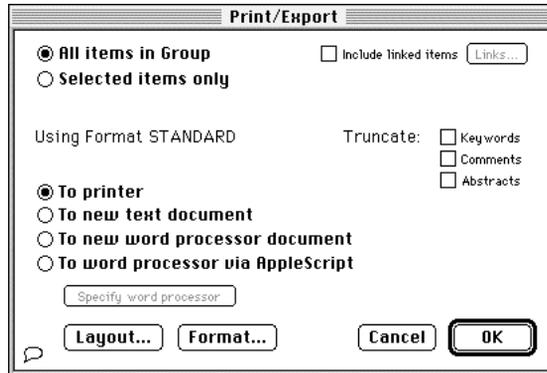
---

## The Print/Export Dialog

To begin, let's tell Papyrus which references we wish to output. Go to the **Windows** menu and choose **All References**. When the All References window opens, select the first three references:



Now from the **File** menu pick **Print/Export...** This dialog will appear:



Let's review your options here. (Except for that Include linked items checkbox, which I'll save for a future chapter.)

- All items in Group**
- Selected items only**

Here you indicate whether you wish to export all of your database's references, or only the ones you have selected in the All References window. For our present purposes the latter will suffice, so click **Selected items only**.

As you will learn in a later chapter, a **Group** is a collection of references from your database. The All References window is just a special Group window, namely the Group of *all* references from your database. So in this case, "All items in Group" is equivalent to "All items in your database."

#### Using Format STANDARD

In Papyrus terminology, a **format** is a particular style of displaying a reference. It tells Papyrus whether to put the authors' initials before or after their surnames, whether the title comes immediately after the authors or whether the year intervenes, whether to use a full journal name or just its abbreviation, what punctuation should appear between the journal volume and the page numbers, *etc., etc.*

Formats are identified by a descriptive name. For example:

- |           |   |
|-----------|---|
| STANDARD  | The built-in format that Papyrus uses routinely, and the one I've been using so far in this <i>Workbook</i> . |
| APA       | The somewhat perverse style defined by the American Psychological Association.                                |
| CHICAGO A | One of the styles defined in the Chicago Manual of Style.   |

---

VANCOUVER Used by a large number of biomedical journals ever since their editors got together in Vancouver, British Columbia in 1978.

At the moment, your freshly-created Papyrus database knows only three formats: STANDARD, COMPACT and BRIEF. In the next chapter of this *Workbook* I will show you how to access the multitude of predefined formats that we have provided with your copy of Papyrus. And in a later chapter I will show you how to create your own output formats. For our present purposes, though, we shall stick to STANDARD.

All of the formats I've just mentioned are **output formats**. Papyrus also uses formats when it *imports* references from other computer files—those formats are called **import formats**. And there is a variant type of output format that displays references in neat columns—we call these **tabular formats**. In fact, and as you have already seen in the All References window, the built-in BRIEF format is a tabular one.

Truncate:  Keywords  
 Comments  
 Abstracts

Some output formats, such as STANDARD, include each reference's keywords, comments and abstract along with the usual authors, title and so on. Depending on the use to which you are going to put this current reference list, you may or may not wish to clutter it up with all of this extra information. If you tell Papyrus to **truncate** any of these fields, then only the first line or so of that field will appear on the list.

For example, here is our Reference #6 with nothing truncated:

6. Ramasubramanian,SR (1992): Eclectic neurosurgery. In: Work Once, Publish Forever. (Perish,N, ed.) (Career Maintenance Series, Part 27.) Academic Press, Chicago, 201-240.  
<<This chapter summarizes the author's work on psychic surgery over the past twenty years. Although he gravely discusses a small number of animal studies, the bulk of the work presented deals directly with Homo sapiens>>  
[Neurosurgery; Review Article; Success]

Here is the same reference with truncation:

6. Ramasubramanian,SR (1992): Eclectic neurosurgery. In: Work Once, Publish Forever. (Perish,N, ed.) (Career Maintenance Series, Part 27.) Academic Press, Chicago, 201-240.  
<<This chapter summarizes the author's work on psychic surgery over the ...>>  
[Neurosurgery; Review Article; Success]

For the current exercise you can leave all of the truncation checkboxes unchecked.

- 
- To printer**
  - To new text document**
  - To new word processor document**
  - To word processor via AppleScript**

Papyrus offers you even more flexibility than you see here—some of these four choices provide further sub-choices. In the rest of this chapter we will examine each of these choices in turn.

For now, stick with **printer**.

If there *is* no printer attached to your computer, then please just bear with the rest of us for a little while.

#### **Layout...**

Clicking this button lets you specify the overall layout of your reference list. This includes such parameters as margins, title, font, font size, headers and footers.

We'll explore these settings in just a moment.

#### **Format...**

If we wished to use a format other than **STANDARD** for this reference list, we would click this button to bring up a list of all output formats known to your Papyrus database.

As discussed above, we'll save this button for future chapters.

Now go ahead and click the **Okay** button. Your usual Macintosh printer dialog will appear, and then Papyrus will print out your three selected references.

## The Layout dialog

Now that you've printed your first list of Papyrus references, let's explore some of the other options that we passed by a moment ago.

Once again, choose **Print/Export...** from the **File** menu. When the Print/Export dialog opens, click its **Layout...** button. This will produce:



---

For the current date or time, or the page number, click the appropriate button to insert it into the Footer boxes.

You can set the Starting page number when you print a bibliography for an already-printed manuscript, so that the page numbers match up correctly.

The Single item per page checkbox comes in handy if you'd like to print your references onto file cards.

## Sending output to your word processor

Although Papyrus makes it easy for you send your reference lists directly to your printer, in many cases you will instead wish to send them to your word processor, where you can add the references to a manuscript or maybe do some typographical fine-tuning.

To accomplish this, in the Layout dialog you should click the appropriate radio button:

- To printer
- To new text document
- To new word processor document  MacWrite  RTF
- To word processor via AppleScript

Papyrus will create either a MacWrite or an RTF document, ready to be opened by your particular word processor. Every Macintosh word processor can work with at least one of these file formats.

Papyrus also needs you to tell it what word processor you use. Click the  button and then point Papyrus to your particular word processor application.

Papyrus will set the “creator” of your new MacWrite or RTF document to this word processor. Should you double-click the document icon, the Finder will then know what application is supposed to open the document.

Why don't you give this a try now? Here are the appropriate settings for a few of the more popular word processors:

Microsoft Word	RTF
WordPerfect	MacWrite
Nisus Writer	RTF
AppleWorks	RTF
(a.k.a. ClarisWorks)	

---

Go ahead and send your list of references to a word processor document. When Papyrus has finished doing that, go to your word processor and open the document to confirm that Papyrus has done its job correctly.

## Using AppleScript

Papyrus does also offer a more modern approach to interacting with your word processor:

- To printer
- To new text document
- To new word processor document
- To word processor via AppleScript

AppleScript is the Macintosh's very cool approach to integrating all of your applications and system components, allowing them to pass information back and forth in completely flexible ways. For example, Papyrus can use the Apple-defined "word processor suite" of AppleScript commands to communicate with *any* properly designed word processor.

Which really would be cool. If there *were* any properly designed word processors.

Unfortunately, rather than follow Apple's definition of AppleScript commands appropriate to word processors, each manufacturer has instead created its own idiosyncratic AppleScript interface. So rather than a single generic set of word processor commands, Papyrus must use an entirely different set of AppleScript instructions for each different word processor.

Guess which manufacturer has the most feeble AppleScript implementation. Did you guess Microsoft? If so, guess again. Of the major word processors, it is **AppleWorks** (formerly **ClarisWorks**) that makes the least effort to provide a minimal AppleScript interface. That's the word processor made by... Apple.

Discussions of product follow-through and market share are left as an exercise for the reader.

Papyrus does have AppleScripts built in for Microsoft Word (Version 6.0 or newer) and Nisus Writer (Version 5.0 or newer). As of this writing, however, WordPerfect's AppleScript interface contains too many bugs to use, and AppleWorks's interface is too incomplete.

If you use Microsoft Word or Nisus Writer, go ahead and try the AppleScript option and see how you like it. At the very least it can be entertaining to watch your word processor build a document step-by-step in response to instructions from Papyrus.

---

## Creating text or HTML documents

At times you may wish to export your Papyrus references as a plain text document, without all of the usual word-processor bric-a-brac of margins, fonts and so on. For example, perhaps you'll need to e-mail a simple list of references to a colleague.

Producing such a document is easy:

- To printer
- To new text document     Plain text     HTML     TeX
- To new word processor document
- To word processor via AppleScript

In addition to this Plain text setting there are two other sub-choices available.

Selecting HTML will yield a document ready to be included as part of your Web site. Why don't you try this now? Tell Papyrus to once again Print/Export some or all of your references, this time creating an HTML text document. Then open the resulting document in your Web browser. It won't be impressively italicized or boldfaced, since the STANDARD format doesn't include any such frills, but at least you'll be able to confirm that everything is working correctly.

Go ahead and give this a try.

The TeX option allows you to create a document ready to be read by the TeX typesetting system. TeX is used mainly by academics in certain fields of study who prefer a great deal of fine control over their documents. Papyrus actually includes a fair amount of support for TeX. Of course, if you've never even *heard* of TeX before, you shouldn't worry about any of this now.

---

## See Also...

You have now learned the basics of sending your Papyrus references to your **printer**, your **word processor** or your **Web site**. Papyrus also offers other, more specialized sorts of exporting, such as author-indexed reference lists. But when you get to these advanced operations, you'll find that they still use the same **Print/Export dialog** with which you're now familiar.

---

## See also:

### CONCEPTS

*Output Formats*

### REFERENCE

*Print/Export*

*Cross-reference List*

*Indexed List*

---

CHAPTER 6

## Formats, Format Libraries and Predefined Formats

Introduction .....	W56
The Formats window .....	W56
Format Libraries .....	W59
See Also.....	W61

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## Introduction

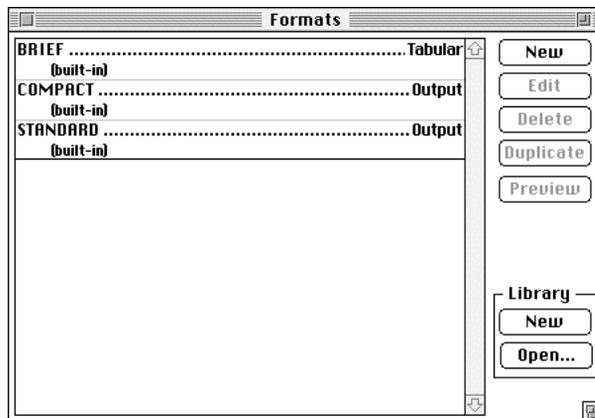
Formats are very important to Papyrus. Papyrus uses an **output format** whenever you see a reference displayed on your screen, and whenever you print or export references. And each time you import references from some other source into your Papyrus database, you must specify an **import format** that matches the incoming data.

In subsequent chapters I will show you how to create your own output and import formats. But in this chapter you get a big head start—I'll show you how to access the many formats we have already provided with your copy of Papyrus.

A freshly-initialized Papyrus database contains only three formats: **STANDARD**, **COMPACT** and **BRIEF**. You add to these three by creating your own new formats, or by copying existing formats from a **Format Library**.

## The Formats window

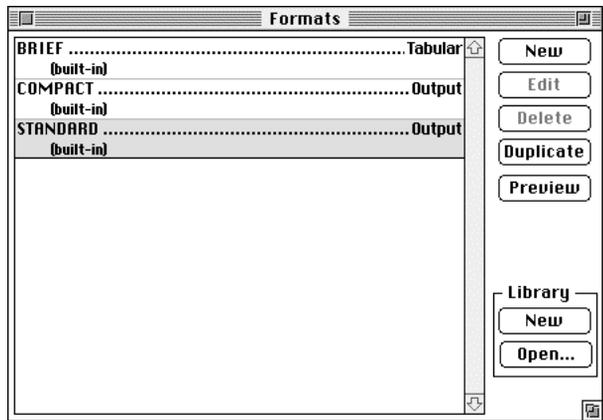
From your **Windows** menu choose **Formats**. Your database's **Formats window** will appear:



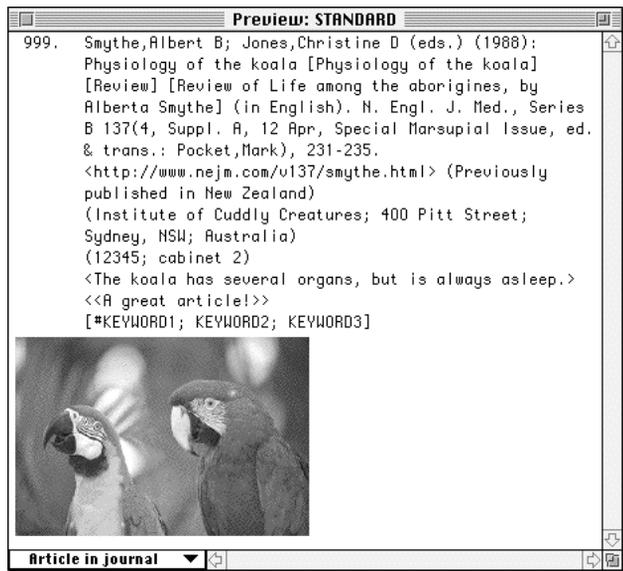
As promised, your database includes the three built-in output formats and, so far, no others.

In this chapter we're not going to touch the **New**, **Edit**, **Delete**, or **Duplicate** buttons. But let's take a quick look at our built-in formats using **Preview**.

With your mouse or arrow keys, select **STANDARD**:



Now click the **Preview** button. This window will appear:



This unsightly jumble of information is actually a sample journal article, displayed using Papyrus's STANDARD format. But the sample article takes advantage of nearly every hidden field that Papyrus offers, including a Picture field that we haven't discussed yet. Because STANDARD is Papyrus's default onscreen output format, it must know how to display all of these fields. Other formats, though, will include only those fields that they consider relevant—for

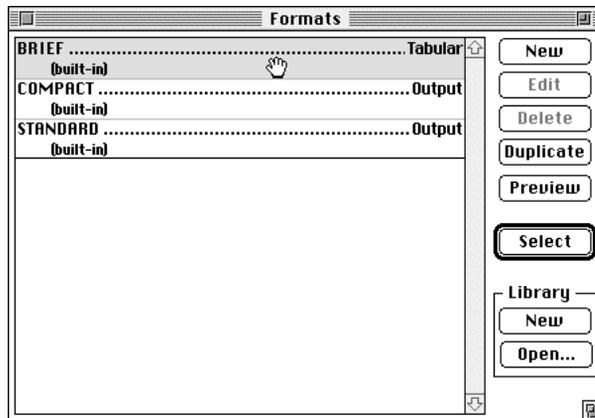
---

example, an output format for a typical journal will not include fields such as Abstract, Comments, or Keywords.

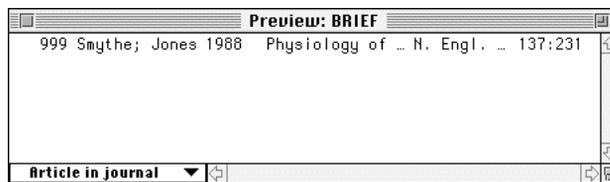
The **pop-up menu** at the bottom of the Preview window allows you to see how the STANDARD format would display sample references of types other than Article in journal. Go ahead and take a look at Book/Monograph and some of the other reference types.

Now let's preview each of the other built-in formats. You could simply close the current Preview window and use the Formats window's **Preview** button again to accomplish this. But just for fun, let's use **drag and drop** instead.

Leaving the current Preview window open, move it aside so that it doesn't obscure the Formats window. Click the Formats window to bring it to the front. Now use your mouse to select the BRIEF format. Notice what happens to your mouse cursor after you click:



The little hand icon indicates that you can **drag** whatever is beneath the mouse cursor. In this case Papyrus is telling you that you can drag a copy of the BRIEF format to another window. So go ahead: click and drag the BRIEF format to the already-open Preview window. Once there, release your mouse button to **drop** the format onto that window:



Does this appear vaguely familiar? Indeed—the **All References window** uses the BRIEF format in its “table” display.

---

Go ahead and do a Preview of the COMPACT format, too. It's not one that you've encountered so far in your exploration of Papyrus, but it won't contain any mysteries for you.

When you've finished exploring the built-in formats, close the Preview window.

## Format Libraries

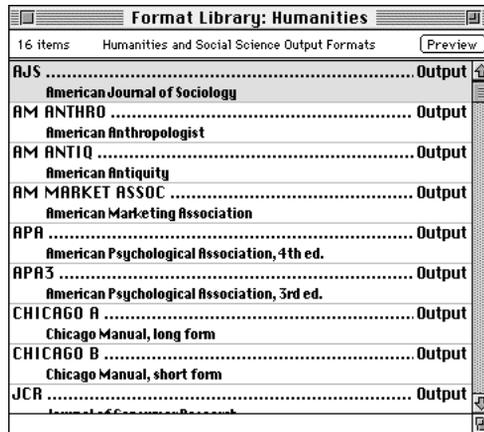
Think of a Format Library as a suitcase for carrying formats from one Papyrus database to another. Here at Research Software Design we have created hundreds of formats. From these we have selected groups of related formats, and placed each group into a Format Library for your benefit. But to actually *use* any of these formats you must first copy them from the Format Library to your own database.

Before proceeding with this section, you'd better be sure that you have some Format Libraries installed! A standard Papyrus installation includes several of these; you can also download others from our Web site. Here's what a Format Library icon looks like:



The name of a Format Library is intended to suggest its contents. For example, the Humanities library includes several output formats of interest to workers in the humanities, while the Bio-medical library contains lots of output formats corresponding to the styles used in important biomedical journals.

You can open a Format Library simply by double-clicking it in the Finder. Or else from the Formats window you can click the Library **Open...** button. Either way, go ahead now and open one of your Format Libraries. I'll use the Humanities library myself:



As you can see, the **Humanities** library contains only output formats. Some other libraries contain import formats. Usually a Format Library provided by Research Software Design will contain only one type of format, but you are certainly welcome to mix output and import formats within any Format Library you create.

The **Preview** button works the same as the one you've already used in the Formats window. You can use it to help determine which of the available formats are relevant to your needs.

To copy a format from a Format Library to your personal database, simply **drag** it from the library window to your Formats window. Or you can use **copy and paste** to accomplish the same thing.

Go ahead and copy some output formats from one or more libraries to your database. In a coming chapter we will make use of these.

---

## See Also...

You now know how to open a Format Library and add any of its predefined formats to your own Papyrus database. You will use these formats in chapters to come.

---

### See also:

#### CONCEPTS

*Output Formats*

#### REFERENCE

*Formats Window*

*Import*

*Shortcuts*

*Formats Window*

---

## Notecards

Introduction .....	W64
Creating a notecard .....	W64
Linking notecards to references.....	W66
Entering references and notecards together	W68
Outputting linked notecards .....	W69
See Also.....	W70

---

## Introduction

A **notecard** is a special type of Papyrus reference. Rather than representing a bibliographic citation, a notecard is the equivalent of a file card onto which you have jotted down some notes.

You can **link** a notecard to a reference. For example, while reading a book you could take notes on different sections, or different themes. The result would be a series of notecards, each linked to the book reference itself. Or you might wish to make a set of notecards linked to a journal article reference, with one card summarizing the Methods section, another card summarizing Results, *etc.*

You can also have free-standing notecards, not linked to any reference. And you can even link notecards to one another. So you can create a whole web of information.

In a later chapter we'll get into these more advanced sorts of links. For the present, though, I'll stick to simply linking notecards to their associated references.

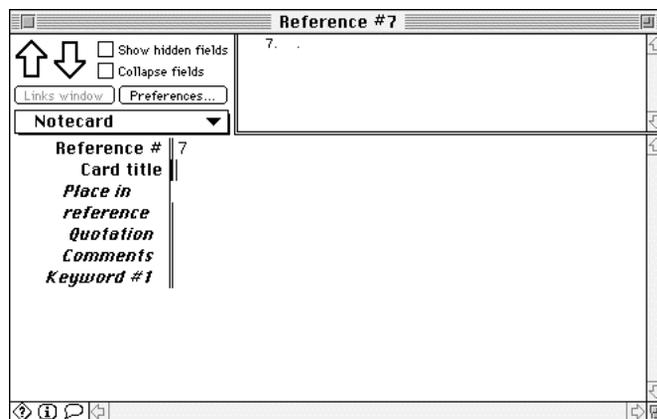
---

**If none of this sounds interesting to you right now, feel free to skip this chapter. None of the following chapters assume that you have entered any notecards into your database.**

---

## Creating a notecard

Entering a new notecard is as easy as entering a new reference. Go to the **Reference** menu and pick **New**. In the resulting Reference Entry window, change the reference type to **Notecard**:



---

As with any Papyrus reference, a notecard gets a **Reference #**. It also has room for **Comments** and **Keywords**. It is in the **Comments** field that you will enter your notes.

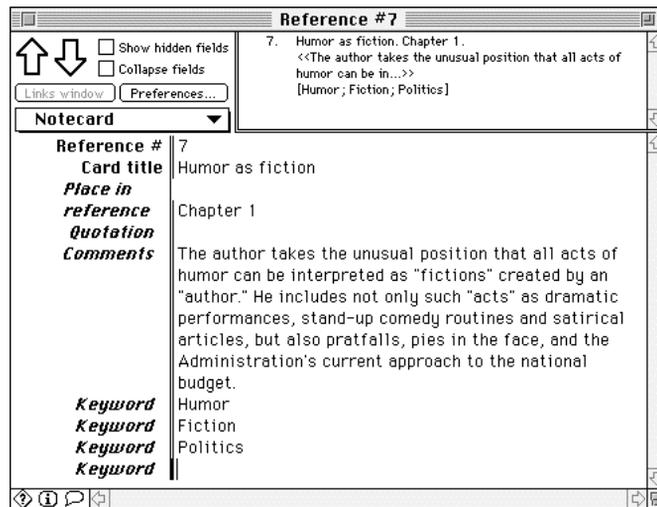
Although you can type as much as you like into a single notecard, I'd suggest that if you find yourself with an extremely large **Comments** field you consider splitting this into two or more separate notecards.

The **Card title** field allows you to quickly identify a notecard. This comes in handy, for example, in windows that show the **Card titles** of all the notecards linked to a particular reference.

**Place in reference** provides a spot where you can indicate to which portion of a linked reference this notecard pertains. Thus, if the reference is a book or a long article you might enter something like pp. 23-30 here, or maybe Chapter 12.

**Quotation** is available for you to record a quotation from a linked reference. Notecards thus provide a way for you to keep track of useful passages that you might later wish to quote in your own work.

For use in the next section of this chapter, let's enter the following notecard:



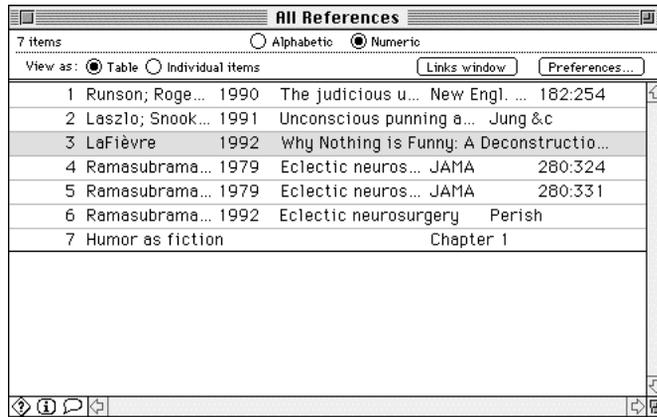
Having typed in the notecard as shown, save it and close the window.

---

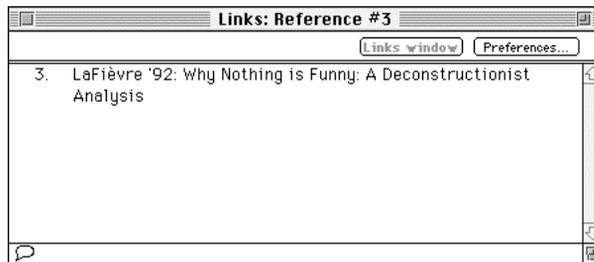
## Linking notecards to references

Now we'll connect the notecard you've just created to an existing reference.

Open the All References window and select Reference #3:

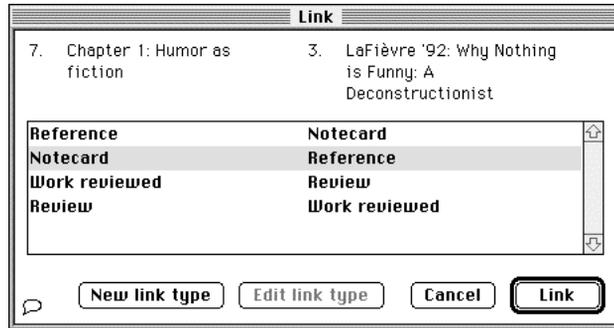


Now click the **Links window** button. A new window will appear:



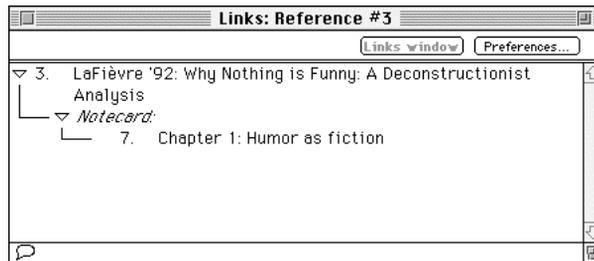
Since Reference #3 doesn't yet have any linked notecards, at this point the **Links window** simply displays Reference #3 itself (using the COMPACT format).

Let us now link your new notecard to this reference. In the All References window, select the notecard, Reference #7. Then **drag** it to the Links window. Papyrus will ask you what sort of link applies between these two references:



The suggested choice is correct: Reference #7 is indeed a notecard, and Reference #3 its linked reference. So click the **Link** button.

The Links window now shows that our two entries are linked, and indicates the nature of that link:



There are several other things you can do in this Links window, but we will save them for a future chapter. If you're really curious, feel free to double-click the balloon help icon for a tour.

Now close the Links window.

Note that in the All References window, if you select either the notecard or its linked reference the **Links window** button will now boldface itself to indicate that the selected item bears links to other items.

---

## Entering references and notecards together

You've just learned how to link an existing notecard with an existing reference. In practice, though, you'll often wish to enter a notecard right after you enter its reference. Or you may want to enter several notecards, one after another, all for the same reference.

Papyrus provides a shortcut for creating new notecards and simultaneously linking them to their parent reference.

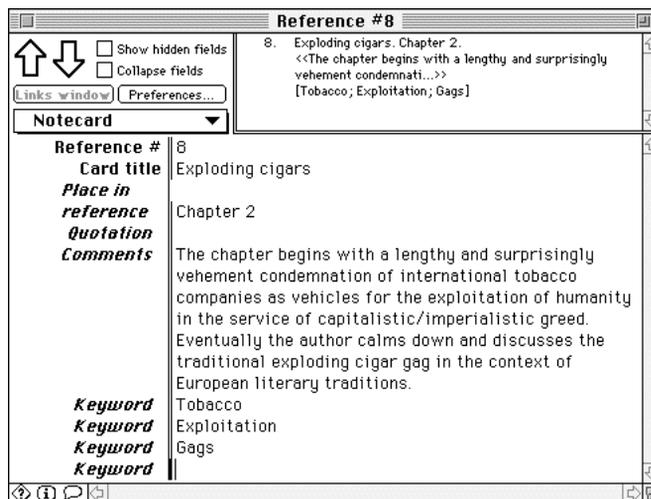
In the All References window, select Reference #3. Then from the **Reference** menu choose **Edit**.

We're not actually going to make any changes to Reference #3 itself. But now that its Reference Entry window is open we're in a position to add one or more notecards to this reference.

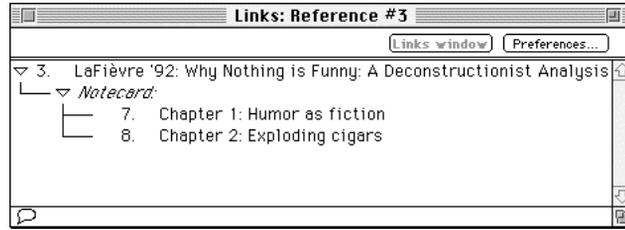
From the **Reference** menu choose **Add Notecards**. Papyrus will do two things:

- open a new Links window for Reference #3 (you may have to move the front window aside to see the Links window), and
- prepare the current Reference Entry window to accept a new notecard.

Now we can enter this new notecard:



Save this notecard by pressing **Enter**. Papyrus will automatically link the new notecard to Reference #3, as evidenced in the Links window:



Papyrus will also prepare the Reference Entry window for another new notecard. But we're done for now, so close the Reference Entry window. Do leave the Links window open, though.

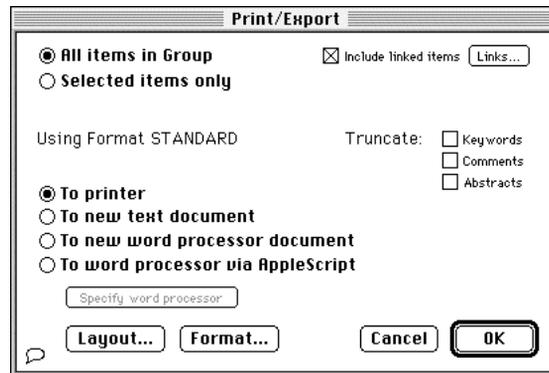
## Outputting linked notecards

There are two different ways to print or export a reference and its linked notecards together.

First, you can simply print a Links window. You should still have Reference #3's Links window open, so try this now. From the **File** menu pick **Print/Export...** The result will be extremely similar to what you see in the Links window on your screen, including the connecting lines and little triangles.

Second, any time you print or export some references you can ask Papyrus to automatically include any linked notecards. And vice versa, as you'll see in a moment.

Close the Links window. With the All References window frontmost, pick **Print/Export...** from the **File** menu. Select All items in Group, and then check Include linked items:



---

Select **To printer** and click the **OK** button. After printing Reference #3 Papyrus will show that reference's notecards. And after printing the notecards themselves, References #7 and #8, Papyrus will show each notecard's linked reference (namely, Reference #3).

The **Links...** button allows you to tell Papyrus to show, for example, the notecards linked to a reference but not the references linked to a notecard. More on this in a later chapter.

## See Also...

You now know how to enter notecards into Papyrus, and to link them to references. You have also seen how to output these linked notecards along with their references.

The link between a notecard and a reference is merely one kind of link that Papyrus allows between any pair of references. The *Reference Links* WORKBOOK chapter provides further discussion of Papyrus's linking capabilities.

---

## See also:

### CONCEPTS

*Notecards and Linked References*

### REFERENCE

*Reference Entry Window*  
*Reference Links Window*  
*Print/Export*

### SHORTCUTS

*Reference Entry Window*  
*Reference Links Window*

---

## CHAPTER 8

# Groups

Introduction .....	W72
Creating a new Group .....	W72
Adding and removing references .....	W73
Sorting the Group.....	W75
Citation/Manual order .....	W78
Printing the Group .....	W80
See Also.....	W82

---

## Introduction

Usually when you wish to print a list of references or export a nicely-formatted bibliography to your word processor, you will not want to include every single reference from your Papyrus database. Rather you will assemble a **Group** of the specific references that are relevant to your needs of the moment.

A Group can contain the results of a **search**, or it might hold the references cited in a particular **manuscript** you are writing. References can be added to the Group or removed from it with no effect on your overall database. You can **print or export** the items in a Group, and perform **search-and-replace** or **spellcheck** operations on them.

The references in a Group can be **sorted** however you wish. For example, you might need to sort a bibliography alphabetically by authors. A *curriculum vitae*, on the other hand, might be sorted by year of publication. You can even create a Group of references sorted by journal and volume, so that you could print out the list and efficiently find the articles at your library.

Sometimes you will need to sort a Group in an arbitrary order. For example, many journals demand that the bibliography be arranged in **citation order**.

---

**For a *complete* understanding of Groups, be sure to read the *Groups* chapter in the CONCEPTS section.**

---

## Creating a new Group

From the **Group** menu pick **New Group**. A fresh **Group window** will open:



---

This window should look familiar to you, as it is extremely similar to the **All References** window. In fact, the latter is merely a special Group window.

At this point your new Group is just an empty bucket. But while it does not yet contain any references, it does have some starting properties of its own. The Group assumes that when you print or export its contents you will want to use the **STANDARD** format. It also assumes, as we'll see in a moment, that you wish to sort the Group's references alphabetically by author.

Each Group has room for a **description**. Someday you may have dozens of Groups stored on your disk, and these descriptions will help you recall the purpose of each.

As you can see, the default description is a bit generic:

You can type a useful description here

So let's change this default description to something at least marginally useful. From the **Group** menu pick **Edit Description**. Then type in a new description, such as:

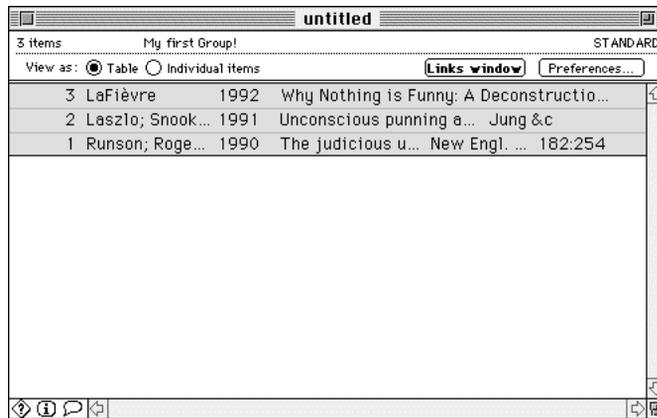
My first Group!

Press **Tab** or **Return** after you've entered your new description.

## Adding and removing references

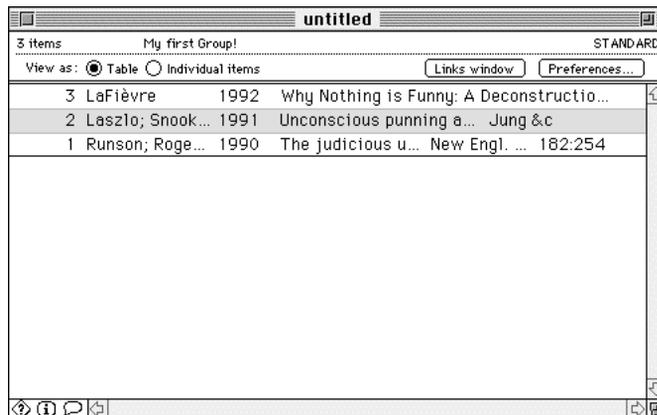
Leaving our Group window open, go to the **Windows** menu and select the All References window. In that window select References #1, 2, and 3. Now we'll add those references to our Group window. You can either **copy** them in the All References window and then **paste** them into the Group window, or else you can **drag** them from the All References window to the Group window. Use whichever method you prefer.

As promised, note that Papyrus automatically sorts the references alphabetically by author:



If you worked through the exercises in the *Notecards* chapter, then you'll now notice that the **Links window** button has boldfaced itself. As you'll recall, this means that at least one of the selected references has some notecards linked to it.

Removing a reference from a Group is equally straightforward. Let's get rid of Reference #2. First click in the window *below* the three references to deselect them. Then click Reference #2 so that it is the only one currently selected:



Now you can do any of a number of normal Macintosh things to remove this reference from the Group:

- press the Delete key
- press the Clear key

- from the **Edit** menu choose **Clear**
- from the **Edit** menu choose **Cut**

Using your favorite of these methods, go ahead and remove Reference #2 from your Group.

If you were a child who enjoyed stacking blocks just so you could knock them down again, feel free to **undo** the removal of Reference #2 and then try another of these methods of eliminating it from the Group.

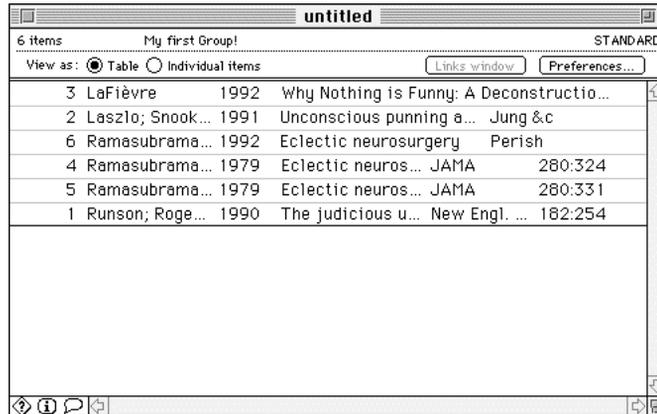
You can tell any onlookers that you are just being thorough in testing all of the available options.

Note that although Reference #2 has been removed from this Group, it remains unscathed in your database. A quick peek at the All References window will reassure you of this.

## Sorting the Group

Before I can show you a few things about sorting your Group, we'd better fill it up a bit more. So go ahead and add References #1 through #6 to it.

You can simply select all six of these references in the All References window and drag them to the Group window. That two of them were already sitting in the Group window is no problem.



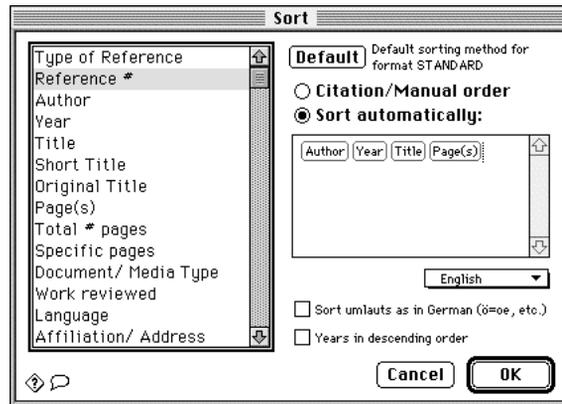
6 items						My first Group!		STANDARD	
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items						Links window		Preferences...	
3	LaFièvre	1992	Why Nothing is Funny: A Deconstructio...						
2	Laszlo; Snook...	1991	Unconscious punning a...	Jung &c					
6	Ramasubrama...	1992	Eclectic neurosurgery	Perish					
4	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:324				
5	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:331				
1	Runson; Roge...	1990	The judicious u...	New Engl. ...	182:254				

As before, you can see that Papyrus has automatically sorted these references alphabetically by their authors.

The three references with the same first author have been sorted by their *second* authors. You can use the **Individual items** view to confirm this.

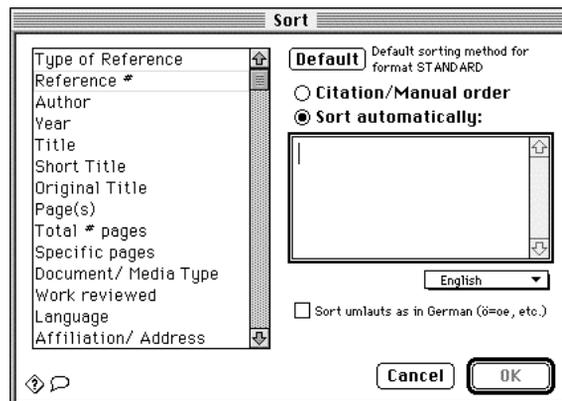
---

Let's change the Group's sorting. For starters, how about sorting by Reference Number? Go to the **Group** menu and pick **Sort...** This dialog will appear:



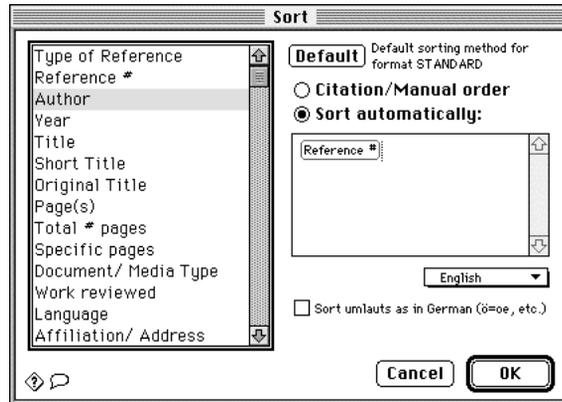
Our Group is currently sorted first by author, and then—if two references' authors are identical—by year, and if necessary then by title and then by pages.

Let us erase this sorting pattern. You can press **Tab** to move to the sorting pattern, or else you can use your mouse. Either way, erase the Author-Year-Title-Page(s) pattern:



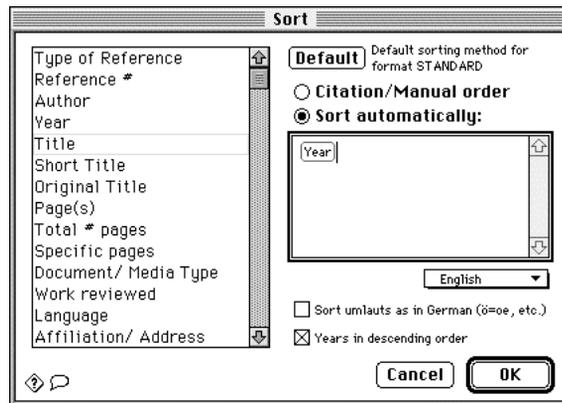
---

Now double-click Reference # in the list of available sorting fields.



Click the **OK** button and watch as Papyrus re-sorts your references.

That was entertaining, wasn't it? Now let's try another sort. This time we'll sort the references by their **years**. And just to make things a bit more interesting, we'll tell Papyrus to sort the most-recent references before the older ones by checking the **Years in descending order** checkbox:



Click **OK** and make sure that Papyrus does what it is supposed to.

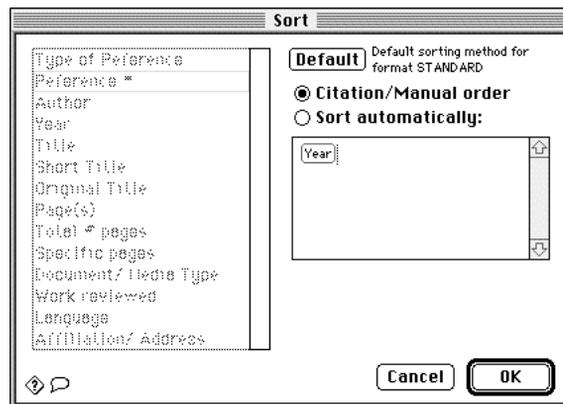
---

## Citation/Manual order

As I mentioned earlier, sometimes a Group must be sorted in an arbitrary order, such as the order in which the references were cited within a manuscript. In Papyrus terminology such a Group is sorted in **citation order** or **manual order**.

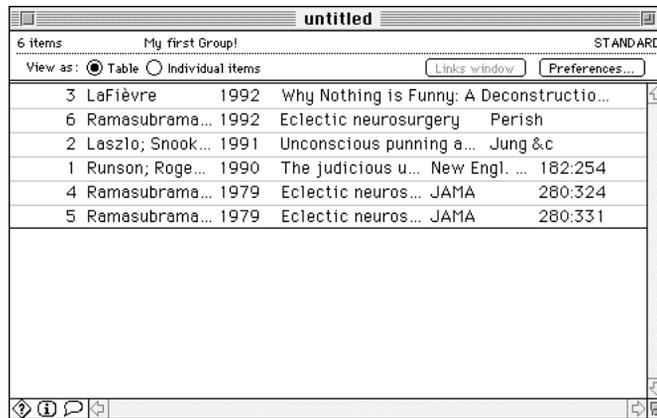
That's "manual" as opposed to "automatic." *I.e.*, you can manually rearrange the references within the Group.

Once again, go to the **Group** menu and pick **Sort...** Then click the **Citation/Manual order** button:

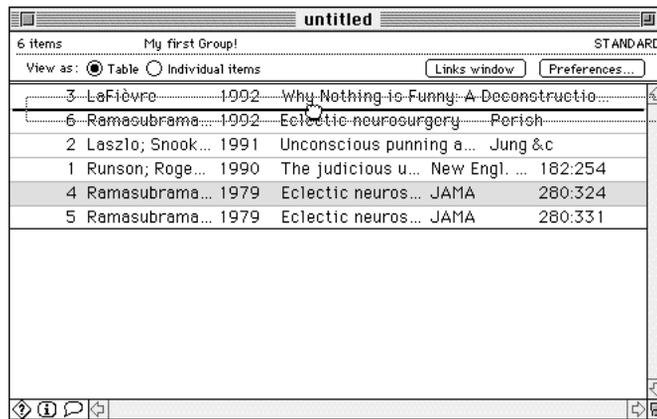


Because you have selected Citation/Manual order, the list of available fields is now irrelevant and, hence, disabled.

Click **OK**. At this point the references of your Group will retain their former order:



Now select Reference #4 and **drag** it to a position between References #3 and #6:



When you release the mouse button, Reference #4 will indeed move to this new position:

---

	Author	Year	Title	Journal	Page Numbers
3	LaFièvre	1992	Why Nothing is Funny: A Deconstructio...		
4	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:324
6	Ramasubrama...	1992	Eclectic neurosurgery	Perish	
2	Laszlo; Snook...	1991	Unconscious punning a...	Jung &c	
1	Runson; Roge...	1990	The judicious u...	New Engl. ...	182:254
5	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:331

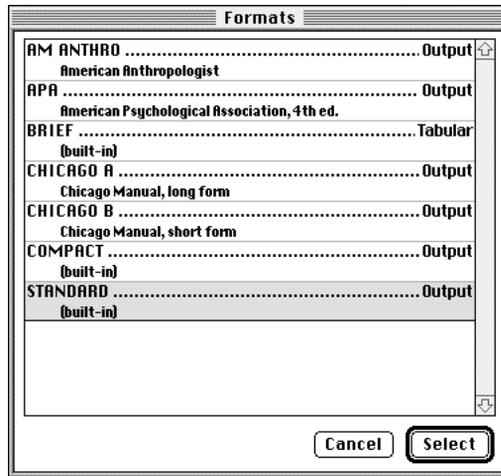
If you like, go ahead and try some more experiments in dragging references about in the Group. You might, for example, use **Shift-click** or **⌘-click** to select two or three references, and then see what happens when you drag them as a bunch to a different position.

## Printing the Group

You will find printing or exporting the contents of your Group easy, assuming that you've already been through the *Printing and Exporting Your References* chapter.

But it would be boring to yet again use the **STANDARD** format here. Did you follow my previous suggestion and copy some other predefined output formats to your database? If so, then let's start by switching your Group's format.

From the **Group** menu pick **Set Format....** Papyrus will present you with a list of all the output formats known to your database:



Go ahead and pick whichever of these formats strikes your fancy, and then click the **Select** button.

Next the **Sort dialog** will appear. It will be set to whatever sorting pattern is appropriate to the format you've chosen. This will either be Author-Year-Title-Page(s) or else Citation/Manual order. Click the **OK** button to accept this suggestion.

Now we can proceed with printing the Group's references. From the **File** menu pick **Print/Export...** I'll now leave you to your own experimentation; everything will behave as you've previously experienced.

When you're satisfied, close the Group window. If you like you can first save the Group to your disk for future experiments (or to proudly display your new skills to your colleagues).

---

## See Also...

You now know the basic operations for creating, assembling, sorting, formatting and printing a Group. These are essential to using Papyrus, where much of the action relates to Groups.

However, there are still *many* additional capabilities and shortcuts involved with Groups. Be sure that you eventually read both the CONCEPTS and REFERENCE chapters about Groups and the Group window.

---

### See also:

#### CONCEPTS

*Groups*

#### REFERENCE

*Group Window*

#### SHORTCUTS

*Group Window*

## Finding References

Introduction .....	W84
Simple searches .....	W84
Quick Finds.....	W86
Complicated searches .....	W88
Another complicated search .....	W92
Wildcards .....	W92
NOT .....	W93
Parentheses .....	W94
Refining a search .....	W95
See Also.....	W101

---

## Introduction

Besides producing nicely-formatted reference lists, Papyrus's other main use is to enable you to search through your database for the references that you need at any given moment.

In this chapter we will start with some basic searches. Then we'll look at some shortcuts for the simplest searches, and gradually proceed to more complicated searches and related issues.

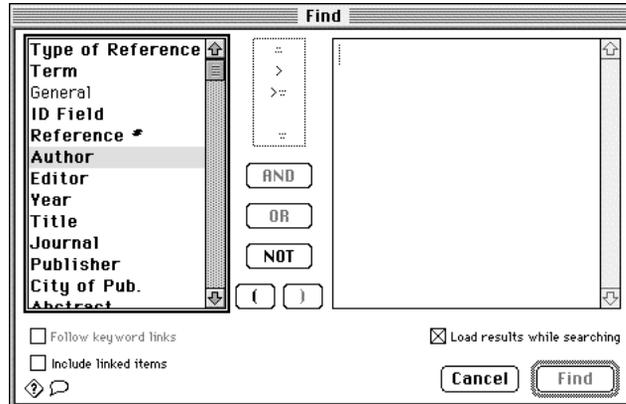
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**The exercises in this chapter assume that your database contains the references entered in the preceding chapters on Inputting and Modifying References. If you have not entered those references, or if your database includes additional references, then some of the following exercises will yield results different from those shown here.**

---

## Simple searches

Let's start by finding all references with Ramasubramanian as an author. From the **Reference** menu choose **Find...** The **Find dialog** will open:



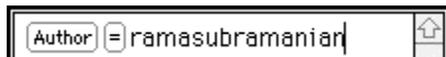
On the left is a list of **fields** that you can search. The one we want, **Author**, is already selected for us.

Press **Tab** to move to the list of **comparisons**. As will most often be the case when you perform a search, we want to pick **=**, which is already selected for us.

---

Press **Tab** again to move to the **search specification** box. Here is where we build up our instructions to tell Papyrus which references it is to find for us. So far our specification indicates that we want to search for a particular author. Now we must type in the name of that author.

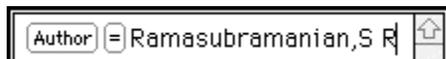
You *could* just type in the whole name now:



But if you would rather save yourself some typing, enter just this much:



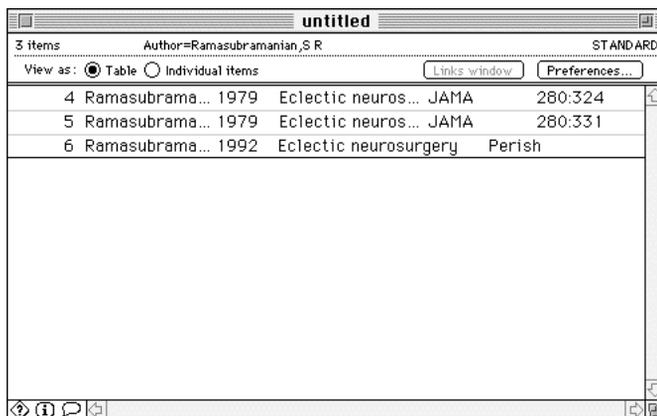
and then press our old friend, **⌘-L** (which is equivalent to going to the **Edit** menu and picking **Look up Author**). In the Names window that now opens, pick Ramasubramanian,S R and click the **Select** button. The result:



If you had typed a few more letters, such as **rama**, before pressing **⌘-L**, there would have been only a single possible matching name in your database. In that case Papyrus would have fleshed out the full name automatically, without taking you to the Names window.

Now that we have a complete search specification—consisting of a **field** (Author), a **comparison** (=) and a **value** (Ramasubramanian,S R)—the **Find** button becomes available. Make sure that the Load results while searching checkbox is checked, and then click the **Find** button.

Papyrus responds by opening a new **Group**, and filling it with the relevant references:



The screenshot shows a window titled 'untitled' with a search specification 'Author=Ramasubramanian,S R' and 'STANDARD' view. The search results are displayed in a table with 3 items. The table has columns for item number, author name, title, journal, and page number.

Item	Author	Title	Journal	Page
4	Ramasubrama...	Eclectic neuros...	JAMA	280:324
5	Ramasubrama...	Eclectic neuros...	JAMA	280:331
6	Ramasubrama...	Eclectic neurosurgery	Perish	

---

This is a perfectly normal Papyrus Group. You can examine any of these references by switching to the Individual items view, you can edit any of them, you can print or export the Group.

The initial settings of this Group are worth noting:

- The **description** shows your search specification.
- The Group is set to use **STANDARD** format for its output.
- The Group is sorted in **citation/manual order**.

There is nothing sacred about the description corresponding to your search specification. If you are going to keep this Group around for further use you are welcome to change the description to anything you wish. But for starters, if you have several Group windows open on your screen then this will be a helpful reminder of what this particular Group represents.

You can change both the format and the sorting pattern to whatever you like. Papyrus defaults to citation order so that as it finds each matching reference it can simply add that reference to the very end of the Group. If you should perform a large, complicated search, this implies that you can safely examine and work with the references showing at the top of the Group window while Papyrus continues to add additional references at the bottom.

You might want to read that last sentence again. Your current database is too small to produce a time-consuming search, but when you do eventually collect a large number of references and ask Papyrus to do some complex search for you, that search might require several seconds or even minutes to complete. *While* the search is running, though, you still have full access to most Papyrus functions, including the ability to examine or modify any of the references that have so far been found and added to the Group.

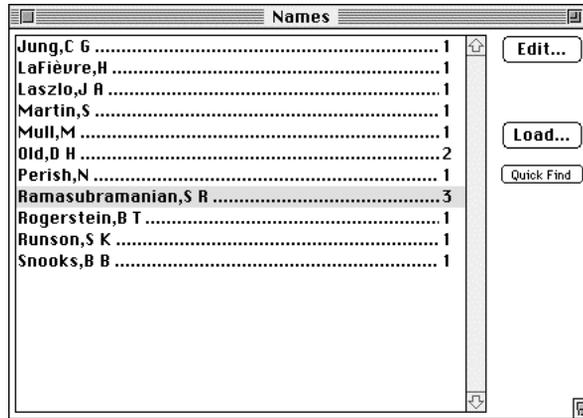
You can close this Group window now. There is no need to save this Group.

I hope you'll agree that this search was quite easy to run. As it happens, though, for such a simple search there is an even easier approach, which I'll show you next.

## Quick Finds

In your explorations of Papyrus so far, do you recall seeing some buttons labelled Quick Find? Think for a moment and see if you can recall in what windows these buttons appeared.

Here's a subtle hint: go to the **Windows** menu and open the **Names window**:



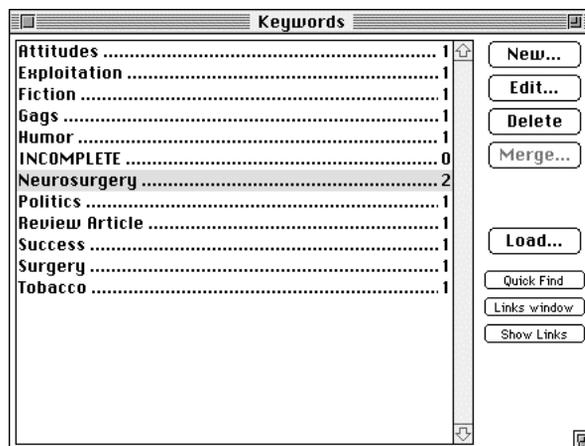
With the name of our friend Ramasubramanian selected, go ahead and click the Quick Find button now.

As you can see, the results are identical to those we obtained a moment ago.

Since the Names window actually includes not only Authors but also Editors, running a **Quick Find** from the Names window will actually find any reference bearing the selected name in *any* of its Author *or* Editor fields.

The **Keywords** and **Journals** windows also provide Quick Find buttons. Let's do a quick keyword search next.

Open the Keywords window and pick Neurosurgery:



Now click the Quick Find button. Papyrus should find the two references bearing the Neurosurgery keyword.

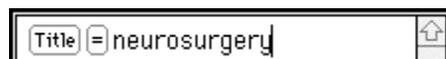
## Complicated searches

Enough with these simple searches. Let's try something a bit more interesting.

Often you'll want to find all references that pertain to a particular topic. If you're particularly compulsive, then you will have already assigned an appropriate **keyword** to each of the relevant references, and could now just do a **Quick Find** from the Keywords window.

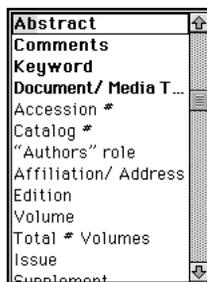
But let's get real. Unless your grants are so generous that you have a platoon of undergraduates adding keywords to all of your references, there are surely references without this keyword that nevertheless mention this particular topic somewhere in a **title**, **abstract** or **comments** field. So a simple keyword search won't suffice here.

Let's search all of these fields at once. Go to the **Reference** menu and choose **Find...** Using the skills you acquired a moment ago, enter this search specification:



Now click the **OR** button. Then press **Tab** to get back to the **field list**.

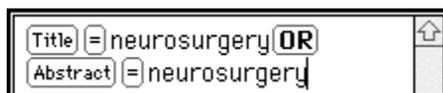
Next we want to pick **Abstract** from this list. You could use your mouse to scroll the list until you find that field, but here's a keyboard shortcut: simply type the first few letters of the field name:



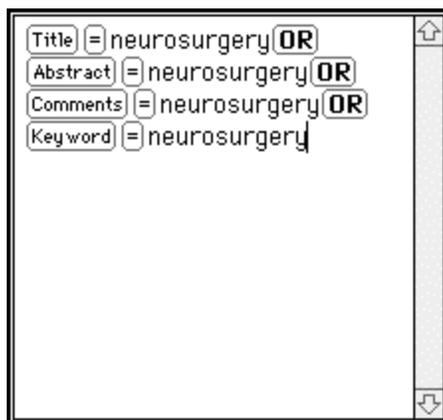
You'll notice that as you type each letter Papyrus moves to the first available item that begins with the letters you've so far typed. Once you've arrived at your desired item (which in this case requires you to type `ab`), press `Tab` to add this item to your search specification.

Then press `Tab` again to add the `=` comparison.

Finally, once again type `neurosurgery`. Here's how things should look so far:



Repeat the above steps until you have achieved the following search specification:



Before we continue with our search, I'd better answer the most commonly-asked question about setting up this sort of search: when am I supposed to use `AND` and when am I supposed to use `OR`?

---

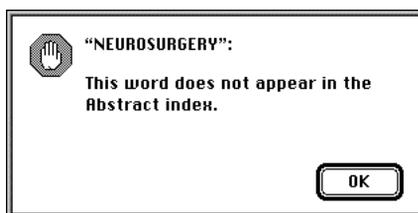
We have used OR here because we wish to find any reference that contains the word neurosurgery in its Title field, *or* in its Abstract field, *or* in its Comments field, *or* in its Keyword field. In other words, if neurosurgery appears in *any* of these fields we'll be satisfied.

In contrast, if we had used AND in place of each of those ORs, then we would be telling Papyrus that we only care about references that contain neurosurgery in *every* one of the four fields. In other words, neurosurgery must appear in the Title field *and* in the Abstract field *and* in the Comments field *and* in the Keyword field. Few, if any, references will meet such stringent demands!

To put all this a different way, using OR *relaxes* your search requirements, offering an *alternative* route for a reference to be considered a successful match. Using AND *tightens* your requirements, adding an *additional* test that any would-be match must satisfy.

Okay, let's proceed with the search. Click the **Find** button.

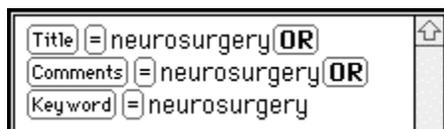
Uh-oh! Papyrus raises this objection:



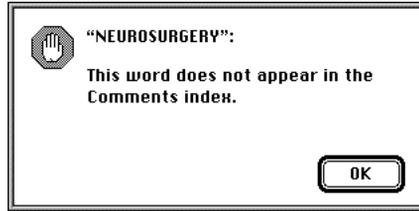
Papyrus has just taken a quick peek into its **index** of Abstract words, and is telling us that there's no point in proceeding with this search, since no reference's Abstract contains the word neurosurgery.

For a lot of important information about indexes, you will eventually want to review the **CONCEPTS** *Indexes* chapter.

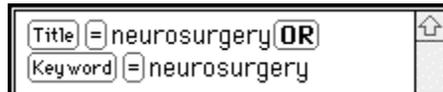
Okay, so there is apparently no need to include the Abstract field as part of our search specification. Go ahead and erase that bit, leaving:



Now click Find again. Oh dear...



Obviously we worked too hard in creating this search specification. Well, go ahead and erase that part of the search specification:



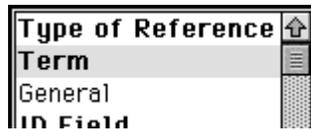
One more time: click **Find**.

Finally! Papyrus now finds the relevant references for us.

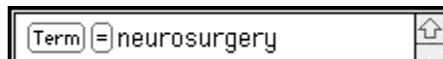
• • •

For such a commonly-needed type of search, that was certainly a tedious experience! Fortunately, Papyrus includes a shortcut for simultaneously searching the Title, Comments, Abstract and Keywords fields.

Open the Find dialog once again. Papyrus provides a special "field":



Term translates to Title OR Comments OR Abstract OR Keywords. So enter this search specification:



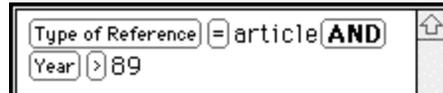
Now click the **Find** button.

This Term search behaves identically to the longer search we entered above. However, Papyrus doesn't waste your time complaining about irrelevant pieces of the search specification, since it understands your intention in using Term.

---

## Another complicated search

Let's get even more interesting. How about finding all journal articles published after 1989? Here's how we indicate this:

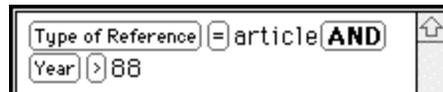


A screenshot of a search interface. It shows a search bar with the text "Type of Reference = article AND Year > 89". There is a small upward-pointing arrow icon on the right side of the search bar.

As you'll recall, AND implies that *both* requirements must be met for a reference to be considered a successful match. If we had mistakenly used OR instead, the search would have accepted any reference that was a journal article, regardless of its year of publication, and also any reference published since 1989, regardless of its reference type.

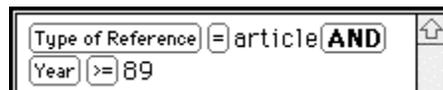
As I'm sure you'll also recall, Papyrus is intelligent about which century you have in mind when you enter only two digits for a year. If you're concerned that it might guess wrong, though, you are always welcome to enter a year using all four digits.

What if we had actually wished our search to also include articles published *during* 1989? There are two ways to accomplish this (the latter being a bit more elegant):



A screenshot of a search interface. It shows a search bar with the text "Type of Reference = article AND Year > 88". There is a small upward-pointing arrow icon on the right side of the search bar.

or:



A screenshot of a search interface. It shows a search bar with the text "Type of Reference = article AND Year >= 89". There is a small upward-pointing arrow icon on the right side of the search bar.

That >= means "greater than or equal to."

## Wildcards

Papyrus follows the very common computer-searching convention of allowing you to type an **asterisk** as a **wildcard** within your search specification. For example, this:



A screenshot of a search interface. It shows a search bar with the text "Title = neuro\*". There is a small upward-pointing arrow icon on the right side of the search bar.

tells Papyrus to find any reference whose title includes any word such as neurology, neurotransmitter or neurosurgery.

---

The asterisk need not appear at the end of a word. For example, this search:

A search box with a dropdown menu set to 'Title' and the text '\*surgery' entered. A search icon is on the right.

will find all references with a title containing such words as **surgery** or **neurosurgery**.

To also include words such as **surgeries** and **neurosurgical** you could specify:

A search box with a dropdown menu set to 'Title' and the text '\*surg\*' entered. A search icon is on the right.

This one will find all references with an author whose surname begins with the letter R and ends in an N:

A search box with a dropdown menu set to 'Author' and the text 'r\*n' entered. A search icon is on the right.

You can even use the asterisk all by itself. For example, this search:

A search box with a dropdown menu set to 'Comments' and the text '\*' entered. A search icon is on the right.

will locate all references that contain *anything* in their Comments field.

The asterisk in **\*surgery** was willing to match nothing at all—thus that pattern would successfully match the word **surgery**. But when you use an asterisk all by itself as we have here, Papyrus interprets this to mean that you are specifically looking for a non-empty field.

## NOT

Sometimes you need to find all references that *fail* to meet some criteria. For example, suppose you want to find all of your database's references that are not journal articles. Use the **NOT** button:

A search box with a dropdown menu set to 'NOT', another dropdown set to 'Type of Reference', and the text 'article' entered. A search icon is on the right.

Or how about looking for all references that have not yet had any Comments entered?

A search box with a dropdown menu set to 'NOT', another dropdown set to 'Comments', and the text '\*' entered. A search icon is on the right.

You can read this as “Find all references for which *it is not the case that* the Comments field contains something.”

---

NOT turns up most often as a way to restrict a search. For example, to locate all recent work by anyone other than a certain prolific author:

A screenshot of a search interface. It shows a search specification: "Year > 1995 AND NOT Author = Ramasubramanian, S R". The interface includes a search bar with a magnifying glass icon and a vertical scrollbar on the right.

Or suppose that you wish to find all of your references about cryosurgery, dermatosurgery, telesurgery and surgery in general, but neurosurgery no longer intrigues you. You might enter a search specification such as this:

A screenshot of a search interface. It shows a search specification: "Term = \*surgery AND NOT Term = neurosurgery". The interface includes a search bar with a magnifying glass icon and a vertical scrollbar on the right.

Read this as "Find all references whose Title, Comments, Abstract or Keywords include a word ending in *surgery*, but exclude from the results any including the word *neurosurgery*."

Those of you who studied propositional calculus during childhood already know that the English word **but** is equivalent to the logical term **and**. For the rest of you, just remember that whenever you feel a desire to type **BUT NOT** in a search specification, you must use **AND NOT**.

## Parentheses

Sometimes a complicated search specification can be confusing or ambiguous. For example, recall that this search:

A screenshot of a search interface. It shows a search specification: "Year > 1995 AND NOT Author = Ramasubramanian, S R". The interface includes a search bar with a magnifying glass icon and a vertical scrollbar on the right.

will find all recent references lacking this particular author. Now, we could have just as easily entered these two criteria in the opposite order:

A screenshot of a search interface. It shows a search specification: "NOT Author = Ramasubramanian, S R AND Year > 1995". The interface includes a search bar with a magnifying glass icon and a vertical scrollbar on the right.

What we *intended* here was:

It is not the case that Author = Ramasubramanian,SR  
AND  
Year > 1995

---

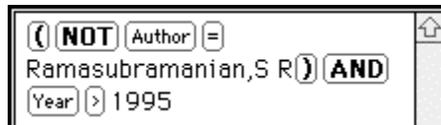
But one could just as easily read this search specification as:

It is not the case that:

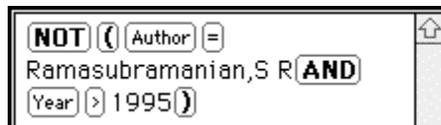
Author = Ramasubramanian,SR  
AND  
Year > 1995

In other words, does that NOT apply just to the first search condition regarding the author, or does it apply to *everything* that follows? This is no small distinction—the second interpretation will find all references in your database *except* for those that are *both* by Ramasubramanian *and* were published since 1995. This is quite different from our intention!

You can use the ( and ) buttons to clear up such ambiguous situations. The version we intended could be entered as:



while the undesired version would be:



If you're ever in doubt about this sort of thing, feel free to add enough parentheses to make things absolutely unambiguous.

## Refining a search

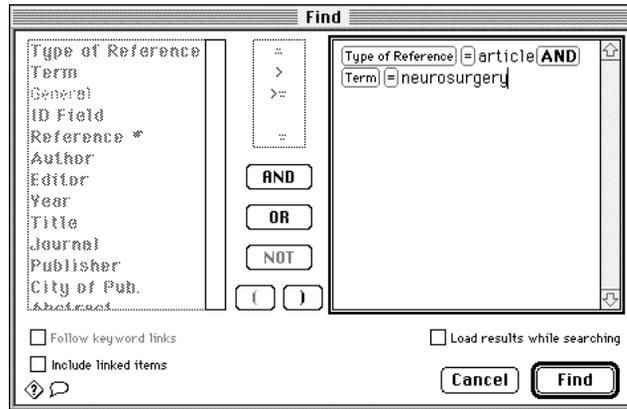
You can build up a complicated search piece by piece, stopping after each new search condition to see how many matching references you've found so far. This comes in particularly handy when you're trying to find just a few specific references in a database containing thousands of entries.

Since *your* database doesn't yet contain thousands of entries, you'll need to use your imagination a bit as we proceed here.

I seem to recall once seeing an article about an unusual application of neurosurgery. It was in one of the major medical journals, and must have appeared prior to 1985.

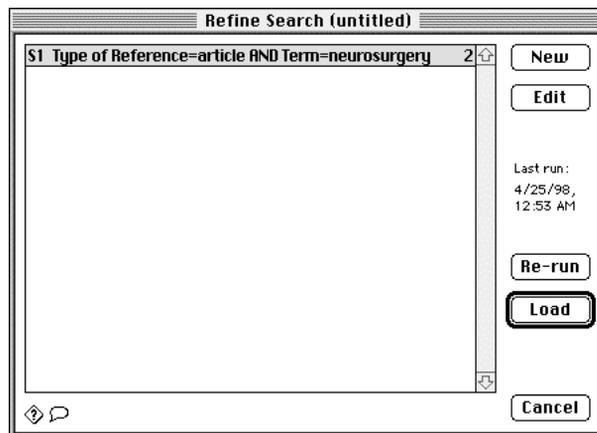
---

Let's begin our hunt by finding all journal articles about neurosurgery. Go ahead and enter this search in the Find window:



Now *uncheck* the Load results while searching checkbox (for reasons that will become clear in a moment), and then press the **Find** button.

As with the other searches you've done, Papyrus opens a new Group window. But this time it doesn't simply fill that Group with the references found during our search. That's because this time we told it to not automatically load the search results. Instead, Papyrus performs your search and then opens the **Refine Search dialog**:

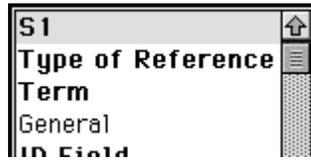


---

Here we can see all of the searches that have been run so far in the Group named untitled. Specifically, there has been a single search performed, and this search has been assigned the imaginative name S1. This search found a total of two matching references.

Here is where I'd appreciate you starting to exercise your imagination. Pretend that we just found *200* matching references. Otherwise the following steps are going to seem like a lot of unnecessary work.

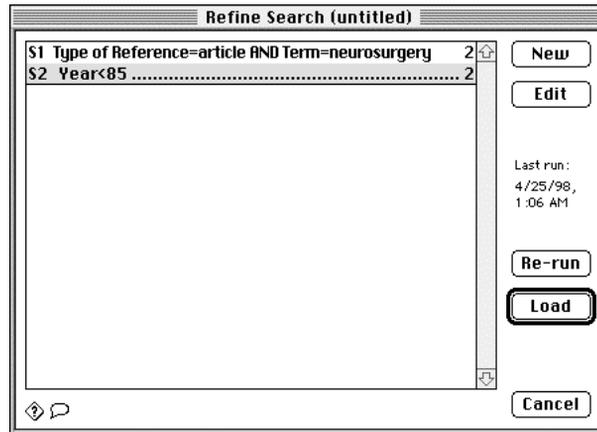
Okay, let's narrow down this vast set of results. First, let's see how many pre-1985 references are in the database. This means doing a new search, so click the **New** button. Up comes the Find window, which now includes S1 among the "fields" we can include in a search:



But we're not going to select S1 just yet. Instead, just find all references from before 1985:



Ah, another vast sea of contenders:



Let's combine these two searches to narrow the possibilities. Click the **New** button, and then enter this search specification:



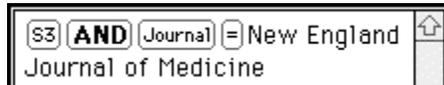
Note that when we use S1 or S2 in our search specification we do not include a comparison such as = nor any value such as neurosurgery. The above S1 AND S2 means “Find all references that were found *both* in search S1 *and* in search S2.”

Okay, click the **Find** button.

S1 Type of Reference=article AND Term=neurosurgery	2
S2 Year<85 .....	2
S3 S1 AND S2 .....	2

Well, *that* didn't help in limiting the number of possible matches!

I had recalled that the article in question appeared in a major medical journal. Let's try this new search:

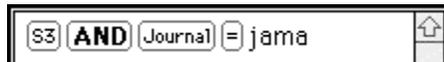


No need for you to type out that whole journal name. Just enter a reasonable abbreviation, such as **nejm**, and then press **⌘-L**.

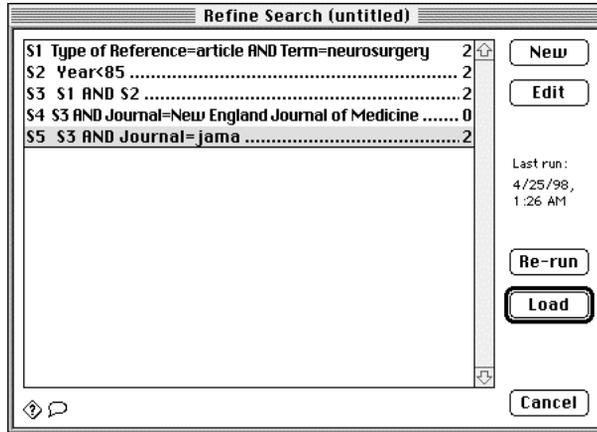
But apparently this wasn't the correct major medical journal...

S1 Type of Reference=article AND Term=neurosurgery	2
S2 Year<85 .....	2
S3 S1 AND S2 .....	2
S4 S3 AND Journal=New England Journal of Medicine .....	0

How about:



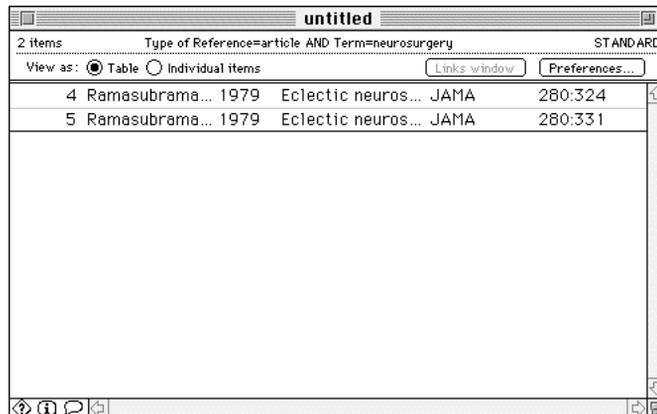
Ah-ha!—



You can stop using your imagination now. This time we really *did* find exactly two references.

So we now have two references that are about neurosurgery, pre-date 1985, and appeared in the journal I apparently had in mind. It's time to examine our catch more closely.

Although all of these searches *belong* to the current Group, the Group itself is still empty. We must now **load** one of the search result sets into the Group. So with search S5 selected, click the **Load** button. Papyrus will add the references found in this search to the Group:



Note that the Group **description** still reflects the original search specification that created the Group. By now that description isn't really an accurate summary of why these particular two references are in the Group.

---

If after examining these references we were still unsatisfied, we could perform further searches within this Group by going to the **Group** menu and picking **Refine Search...** This would re-open the Refine Search dialog, and we could then continue to create and combine additional searches. Try it now for yourself, if you like.



Before we leave this topic, I'd better say a few words about this **load** business.

Whether Papyrus loads the results of a search into the Group is controlled by the **Load results while searching** checkbox in the Find window. If the box is checked, then Papyrus will immediately load each successful match into the Group as it is found. If the box is not checked, then Papyrus will instead open the Refine Search dialog and just report the total number of successful matches. You can then run additional searches, or else load the results of any of the searches.

There are two reasons for separating the load step from the search step. First, suppose that after doing a whole series of searches you end up with one search—let's call it **S6**—with 25 matches, and a further-refined one—**S7**—with only 2 matches. You might feel that **S7** has become overly narrowed, and decide to examine the results of **S6** instead. Because Papyrus allows you to load *any* of your searches, not just the most recent one, this is no problem.

The second reason is at least as important. When Papyrus performs a search it reads through your database to identify the matching references. This takes a certain amount of time, but Papyrus has been designed so that most searches will get through this step quite rapidly. In order to load the results into your Group, though, Papyrus must then pull up each of these references and examine the existing members of the Group in order to decide where the new one should be inserted. The more complex the sorting method used by the Group (*e.g.*, alphabetically by author, then chronologically by year, then...) the longer it will take to insert each new reference into the Group at the appropriate spot. By separating the searching step from the loading step, each of the searches you perform will run more quickly, and you only have to pay the loading penalty once.

Please don't let me scare you *too* much about this loading thing! It really does not take an eternity to load references into a Group. But for a simple search, finding each reference does take less time than loading it, so the more matches your search finds, the more time spent on the loading part of the process.

So, when should you check the **Load results while searching** box, and when shouldn't you?

For the typical quick hunt for a reference, check the loading box. If a relatively small number of matches are going to occur, then there will not be much time spent loading them into the Group, and you can avoid the extra steps of using the Refine Search dialog.

For more complicated searches, particularly those where you would like to start with one or two broad criteria and then narrow the results based on the number of matches found, it makes sense to defer loading until you've seen how many matches you've got.

---

## See Also...

Congratulations! You have now learned how to search your Papyrus database for particular references. Most often you will find yourself running **simple searches**, and in many cases you can get away with just clicking a Quick Find button in the Keywords, Journals or Names window. But you have also learned to set up **complicated searches**, and to use the **Refine Search** dialog to assemble a search piece by piece.

There are still important concepts you will want to review sooner or later in the *CONCEPTS Indexes* chapter.

---

### See also:

#### CONCEPTS

*Indexes*

*Groups*

#### REFERENCE

*Group Window*

*Find Dialog*

*Refining a Search*

#### SHORTCUTS

*Find Dialog*

*Refine Search Dialog*

---

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CHAPTER 10

## Globally Changing Information

Introduction .....	W104
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Journals .....	W105
Names .....	W107
Replacing text .....	W109
Changing fields .....	W112
See Also.....	W115

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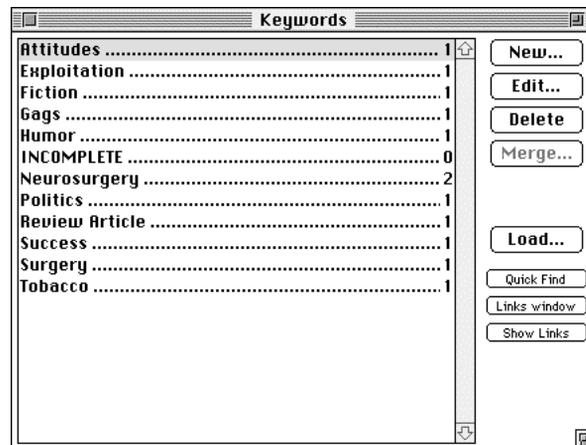
## Introduction

From time to time you will need to make a **global** change throughout your database. For example, you may discover that a particular author's name has frequently been misspelled. Or perhaps you'd like to add the text "Used in my 1999 review article" to the Comments field of a few hundred references. Or you might decide that the keyword you've been entering as "Totally Loony" would look better to your supervisor as "Thought Disorders."

Papyrus provides several convenient ways for you to make such sweeping changes. Simplest are changes to keywords or journals, since these are already saved in their own autonomous "dictionaries." Similarly, the Names window provides a central location for globally editing author and editor names. For information in all other fields, Papyrus provides two different sorts of search-and-replace dialogs.

## Keywords

From the **Windows** menu choose **Keywords**. The **Keywords window** displays all of the keywords currently available in your database:



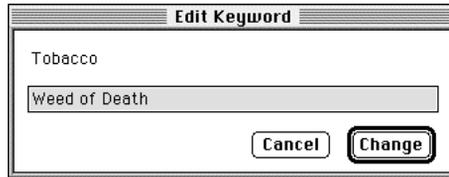
You can see how many references cite each keyword. For example, there is currently one reference bearing the keyword **Attitudes**, and two bearing the keyword **Neurosurgery**. The built-in keyword **INCOMPLETE** is not currently being cited by any references.

Let's change one of these keywords. Select **Tobacco**, and then click the **Edit** button.

---

Do you remember all of the methods you can use to select **Tobacco**? You can click that line with your mouse. You can use your ↑ and ↓ keys to move the selection. Or you can type the first few letters of the keyword.

In the resulting **Edit Keyword** window, let's make some innocuous change to the spelling of this keyword. Hmm. How about:



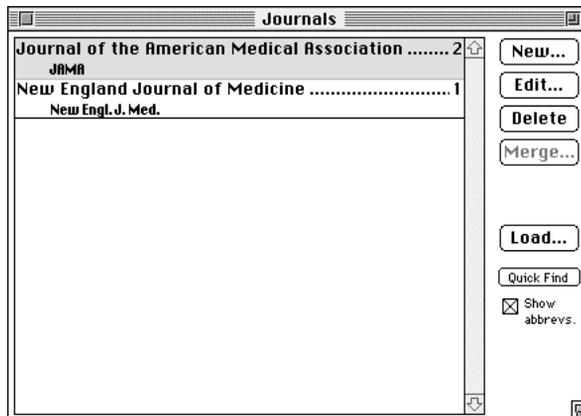
After you have made this spelling correction, click the **Change** button. You will immediately see the change reflected in the Keywords window.

Any reference that cites this keyword will henceforth display the new spelling. If you would like to confirm this for yourself, click the Quick Find button.

Close the Keywords window when you're done.

## Journals

Changing a journal name or journal abbreviation is as easy as changing a keyword. From the **Windows** menu choose **Journals**. The **Journals window** will open, showing all of the journals you have so far entered in your database:



---

There's actually nothing wrong with what we've entered for either of these journals, but just for the practice, select JAMA and click **Edit**.

Or just **option-double-click** the **JAMA** line. In these "dictionary" windows (Keywords, Journals, Formats, Names, Glossary) option-double-clicking an entry is always the same as clicking the **Edit** button.

The screenshot shows a dialog box titled "Edit Journal". It contains the following fields and controls:

- Full Journal Name:** Journal of the American Medical Association
- Standard Abbrev.:** JAMA
- Call Number:** [Empty text box]
- ISSN:** [Empty text box]
- URL:** [Empty text box]
- Comments:** [Empty text area with scrollbars]
- Routinely cite:**  Issue  Day/Month  Series
- Buttons:** Cancel, Change

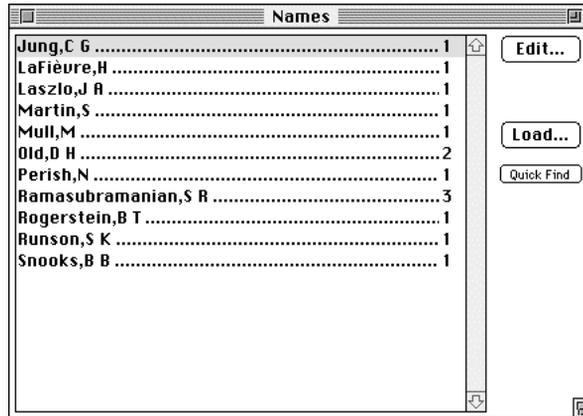
You've encountered this dialog before—it's the same as the **New Journal dialog** in which you entered these journals into Papyrus in the first place.

I don't have any changes in mind for this particular journal, so just click the **Cancel** button, and then close the Journals window.

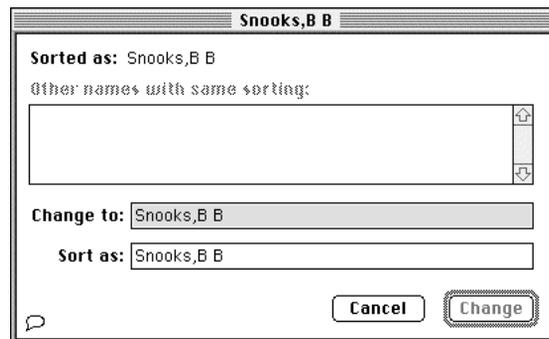
---

## Names

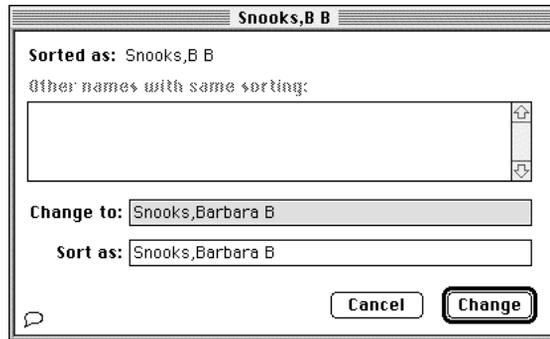
The **Names window** behaves similarly to the Keywords and Journals windows, although what's going on behind the scenes is actually a bit different.



I'd like to fill in the full first name, rather than just the initial, for Snooks,BB. So select that name and then click **Edit**.



Go ahead and change Snooks,B B to Snooks,Barbara B:



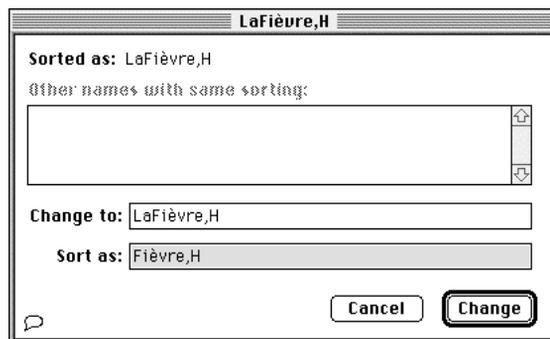
Notice that the **Sort as** text automatically mimics our changes. More about that in a moment.

Click the **Change** button. Our new spelling of this author's name will appear in the Names window, and also in any windows showing references bearing her name.

Next we'll make a more subtle change to LaFièvre. Select that name and click **Edit**.

Or just option-double-click the name.

This time leave the Change to text alone, but in the Sort as field remove the La:



We are telling Papyrus that although this author's name should always be **displayed** as LaFièvre,H, when alphabetically **sorting** references the name should be treated as just Fièvre,H. This distinction between a name's appearance *vs.* its sorting behavior often arises with compound names such as van Gogh,V or von Braun,W.

Click the **Change** button. Note that the Names window now marks this name with a •, to indicate that it will be treated specially when sorting:

Jung,C G .....	1	↑
LaFièvre,H .....	1	•
Laszlo,J A .....	1	
Martin S	1	

You can now close the Names window.

## Replacing text

Open the All References window and select references #4 and #5:

1	Runson; Roge...	1990	The judicious u...	New Engl. ...	182:254	↑
2	Laszlo; Snook...	1991	Unconscious punning a...	Jung & c		
3	LaFièvre	1992	Why Nothing is Funny: A Deconstructio...			
4	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:324	
5	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:331	
6	Ramasubrama...	1992	Eclectic neurosurgery	Perish		
7	Humor as fiction		Chapter 1			
8	Exploding cigars		Chapter 2			

Now from the **Edit** menu pick **Find & Replace Text...**

**Find & Replace Text**

**In:**  Entire database  
 Entire Group  
 Selected items

**Field:**

**Find text:**

Whole field     Whole word     Case sensitive

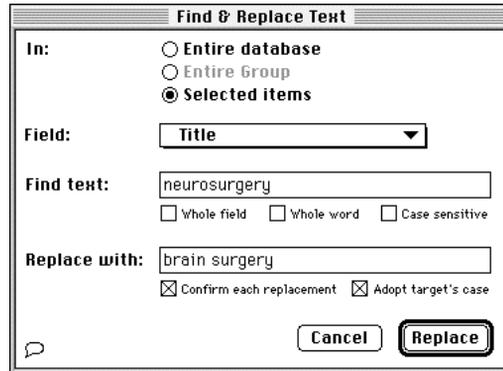
**Replace with:**

Confirm each replacement     Adopt target's case

---

With this dialog you can find and replace text appearing in any field of any or all of the references in your database.

Let's make a change to just the two references we selected in the All References window. Click the **Selected items** radio button. Then fill in the remaining items like this:



The dialog box is titled "Find & Replace Text". It contains the following elements:

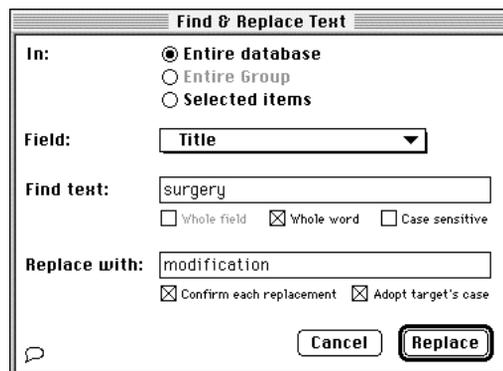
- In:** Three radio buttons: "Entire database", "Entire Group", and "Selected items". "Selected items" is selected.
- Field:** A dropdown menu showing "Title".
- Find text:** A text input field containing "neurosurgery". Below it are three checkboxes: "Whole field" (unchecked), "Whole word" (unchecked), and "Case sensitive" (unchecked).
- Replace with:** A text input field containing "brain surgery". Below it are two checked checkboxes: "Confirm each replacement" and "Adopt target's case".
- Buttons: "Cancel" and "Replace" (highlighted).

We are telling Papyrus to examine the references we have selected (as opposed to every reference in your database), and look for the word **neurosurgery** appearing in their Title fields. If it is found, Papyrus should replace it with **brain surgery**, after first asking us to confirm each replacement.

Go ahead and click the **Replace** button. In each of the Confirm Change dialogs that then appear, click the **Change** button so that Papyrus will proceed with the replacement.

Use the All References window to confirm that Papyrus made these changes correctly.

Let's do another. This time we'll make the change over the **entire database**. We'll also use the Whole word checkbox:



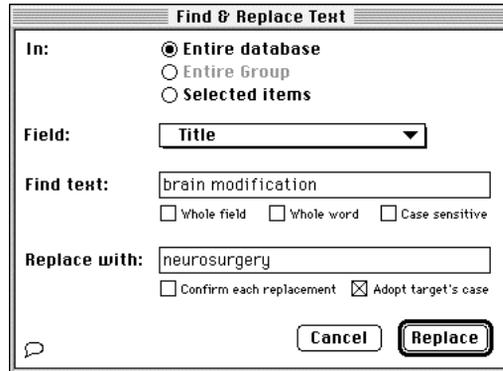
The dialog box is titled "Find & Replace Text". It contains the following elements:

- In:** Three radio buttons: "Entire database", "Entire Group", and "Selected items". "Entire database" is selected.
- Field:** A dropdown menu showing "Title".
- Find text:** A text input field containing "surgery". Below it are three checkboxes: "Whole field" (unchecked), "Whole word" (checked), and "Case sensitive" (unchecked).
- Replace with:** A text input field containing "modification". Below it are two checked checkboxes: "Confirm each replacement" and "Adopt target's case".
- Buttons: "Cancel" and "Replace" (highlighted).

---

Go ahead and click **Replace**. Confirm each change when Papyrus asks you. Note that because we checked *Whole word*, Papyrus does not make any change to the word *neurosurgery* appearing in Reference #6.

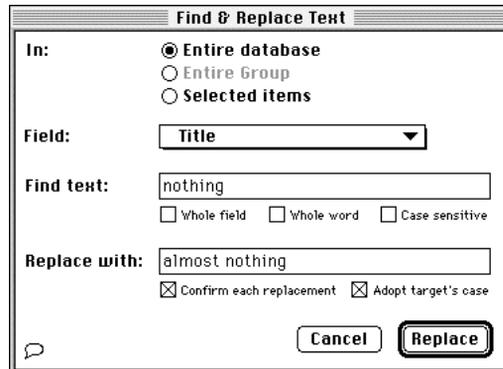
Now let's undo the damage we've caused, without pausing to confirm each correction:



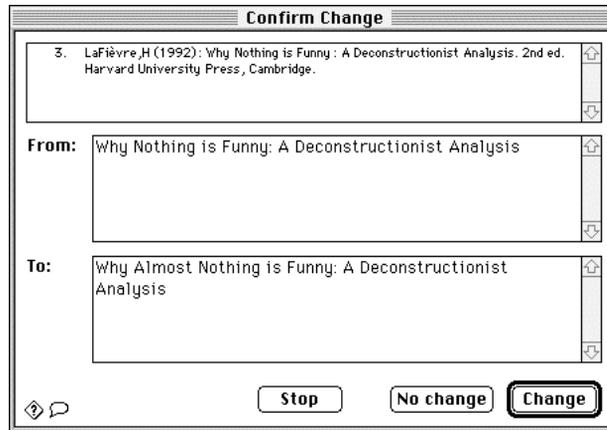
Click **Replace** to return things to their former state.

• • •

Let me demonstrate what that *Adopt target's case* checkbox is for. Try this:



Click **Replace** and then take a good look when the *Confirm Change* dialog appears:



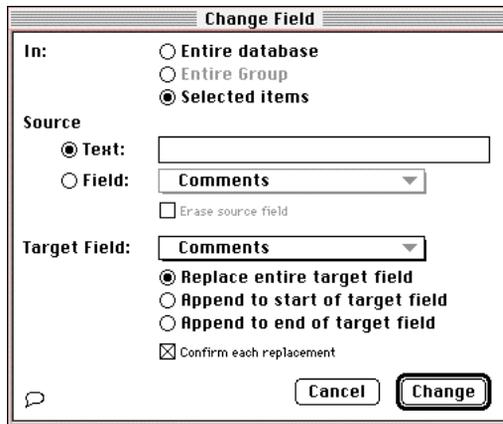
Since we did *not* check the **Case sensitive** box, Papyrus accepts **Nothing** as a match for our **Find text** of **nothing**. In replacing it with **almost nothing**, though, Papyrus has followed our instructions and altered the first letter of each word to **uppercase**, matching the case of the word being replaced.

We really shouldn't alter LaFièvre's title without his permission, though, so click **No change**.

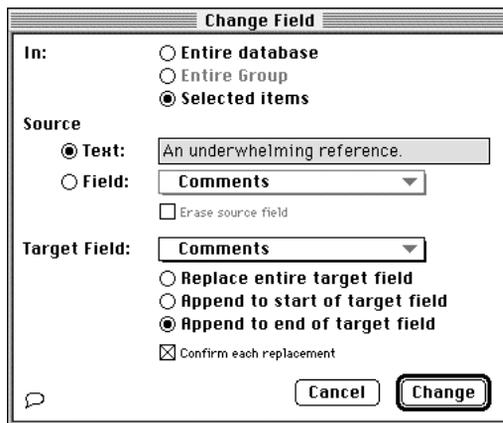
## Changing fields

**Find & Replace Text** is very nice for many things. But sometimes you need to alter a certain field in a batch of references, regardless of the existing contents of that field. For example, you might wish to add a particular phrase to the **Comments** field of each reference.

Allow me to demonstrate. Open the **All References** window and this time select references **#4**, **#5** and **#6**. Then from the **Edit** menu choose **Change Field...**

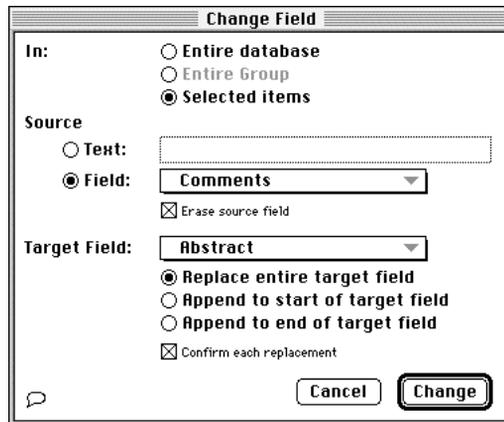


Now fill in the Source Text as shown below, and click Append to end of target field.



Go ahead and click the **Change** button. As you'll see in each Confirm Change dialog, and as you can double-check afterwards in the All References window, Papyrus will indeed add this new sentence to the Comments field of each of the three references. In the case of Reference #6, which already contained some Comments, the new sentence is correctly appended to the end of the existing text, as we requested.

With the same three references still selected, let us now **move** the contents of each reference's Comments field to its Abstract field instead. Here's how:



Be sure to pay attention to the details here, since this sort of global change can drastically alter your database! We have limited our modifications to the three **Selected items**. The **source** for each change will be the existing contents of each reference's Comments field. Since we intend to *move* the Comments, rather than merely *copy* them, we have told Papyrus to **erase** the Comments field after we've performed the change. Whatever Papyrus finds in the Comments field will be put into the **target** field, namely Abstract. If any text already exists in these references' Abstract fields it will be **replaced** by the incoming information.

Now click the **Change** button, and then accept each Confirm Change dialog. Afterwards use the All References window to assure yourself that Papyrus did indeed accomplish what we asked of it.

You might need to **Edit** each affected reference to be absolutely convinced that Papyrus did indeed move the former Comments to the Abstract field.

---

## See Also...

You now know how to make global changes throughout your database. Changing a **keyword**, **journal** or **name** is particularly easy. For other fields, **Find & Replace Text** allows you to quickly locate and modify any bit of text, while **Change Field...** lets you add text to entire fields, or move the contents of one field to another.

---

## See also:

### CONCEPTS

*Journals*  
*Keywords*  
*Names*

### REFERENCE

*Keywords Window*  
*Journals Window*  
*Names Window*  
*Find & Replace Text*  
*Change Field*

### SHORTCUTS

*Keywords Window*  
*Journals Window*  
*Names Window*

---

## Preparing a Manuscript and its Bibliography Together

Introduction .....	W118
Overview .....	W118
Inserting placeholders .....	W120
Processing the manuscript .....	W122
Common special cases .....	W124
Inserting formatted references.....	W125
See Also.....	W128

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## Introduction

One of the main benefits of Papyrus is to automate the otherwise tedious task of preparing bibliographies and inserting the corresponding reference citations into the text of your manuscripts.

You accomplish this by using Papyrus to insert **placeholders** into your manuscript as you compose it in your word processor. Then you tell Papyrus to **process** your manuscript. During this step Papyrus builds a **Group** containing the references indicated by the placeholders. It then creates a **new copy of your manuscript** in which the placeholders have been replaced by the appropriate in-text citations, and to which the bibliography has been appended.

In this chapter you will create a short manuscript, sprinkle some Papyrus placeholders throughout it, and have Papyrus process it. I will also introduce you to some of the more common special cases that can arise.

## Overview

Before I walk you through the actual steps here, let me provide a bit more detailed overview of the entire process.

### Preparing your manuscript

Suppose that you are hard at work in your word processor, preparing your epochal work on, say, recent advances in the neuroanatomical basis of humor. You reach the end of a sentence, and feel the need to cite a reference. You must now insert a **placeholder** for that reference into your manuscript:

...Surprisingly, humor has occasionally been identified even among certain senior researchers. [[2]]

We refer to the double brackets, [[ and ]], as **delimiters**. By default Papyrus expects you to use double brackets for your delimiters, but you are free to change these to any character or characters you prefer.

Within the delimiters appears either the Papyrus Reference # or ID Field corresponding to the desired reference.

A placeholder can also include additional information inside **parentheses**. Papyrus will ignore this information when it processes your manuscript, but in the meantime it can help you recall which reference is being cited:

...Surprisingly, humor has occasionally been identified even among certain senior researchers. [[2 (Laszlo et al 1991)]]

---

You can also cite multiple references at a single point, by including more than one Reference # within your placeholder:

...But several studies [[4 (Ramasubramanian & Martin 1979); 5 (Ramasubramanian & Mull 1979); 6 (Ramasubramanian 1992)]] have shown that such attitudes can be changed.

If you have memorized all of your favorite Papyrus Reference #s (or ID Fields), you can simply **type** your placeholders yourself. But most of the time you will let Papyrus assist you in inserting placeholders.

First you switch to Papyrus and locate the appropriate reference. If you know the initial author you can quickly find the reference in the All References window; if not, you can perform whatever sort of search you desire. Once you have found the reference you simply **drag** it to your word processor window—the appropriate placeholder will now appear in your text.

## Processing the manuscript

Okay, so now the first draft of your manuscript is complete, including plenty of placeholders throughout. It's time to print a copy for your co-workers to review.

In Papyrus, you go to the **Group** menu and choose **Process Manuscript...** In the resulting dialog you point Papyrus to your word processor document and indicate which Papyrus **output format** pertains.

Now Papyrus will create a new **Group** for your manuscript's bibliography. As Papyrus reads through your manuscript, it adds to this Group each of the references mentioned in your placeholders.

Next Papyrus creates a **copy of your manuscript** in which each of the placeholders has been replaced by the appropriate in-text citation. The appearance of this citation is controlled by your output format. For example, if you are using APA format you will get **author-year** citations:

...Surprisingly, humor has occasionally been identified even among certain senior researchers (Laszlo, Snooks, & Old, 1991).

Other formats, such as Vancouver, instead demand a **superscripted number**:

...Surprisingly, humor has occasionally been identified even among certain senior researchers.<sup>13</sup>

Finally, at the end of this new copy of your manuscript Papyrus will insert the properly-formatted **bibliography** of your cited references. These will be in either **alphabetic** or **citation order**, as indicated by your chosen output format.

Now that your new manuscript is ready, you can either delete the Group that Papyrus has just created, or else save it for future use. In most cases you will want to save it, since you are probably not yet finished with this particular manuscript...

---

## Revising

Your ever-helpful colleagues will no doubt have a few constructive criticisms regarding your work. To implement their suggestions you must now return to the **original** copy of your manuscript—the one with the placeholders.

Make any changes to the manuscript you wish, including adding or removing placeholders. After a short time (one hopes!) you will be ready to print a second draft.

You now repeat your previous steps, telling Papyrus to again perform its **Process Manuscript...** function. If you saved the Group from last time, Papyrus will still remember the name of your word processor document and which output format to use.

Papyrus now creates a new copy of your second draft, complete with appropriate in-text citations and final bibliography.

You can repeat this cycle as many times as necessary. Just remember:

---

**Always make your revisions to the *original* copy of your manuscript—the one with the placeholders.**

---

Once everyone is happy with the final manuscript, you can now send it off to the leading journal in your field. All that remains is to prepare your acceptance speech for next year's awards ceremony.

## Resubmitting

Alas! Apparently ignorant philistines have seized control of the leading journal in your field. Your manuscript has been returned to you.

Do not take this setback personally. Instead, follow the example of other famous scholars. Go back to Papyrus and once again choose **Process Manuscript...** Change the output format to, say, *Psychology Today*, allow Papyrus to process your manuscript, and mail off the results.

## Inserting placeholders

To begin with this chapter's exercise, launch your word processor and begin typing an article. For now you can type complete nonsense if you like; just pretend that you are working on your next claim to fame.

At some point, you decide that you need to cite a reference. Let's suppose that you have just typed:

These findings have been confirmed.

Now switch over to Papyrus. Open the All References window and select a reference. For example:

All References					
8 items					
<input type="radio"/> Alphabetic <input checked="" type="radio"/> Numeric					
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items					
<a href="#">Links window</a> <a href="#">Preferences...</a>					
1	Runson; Roge...	1990	The judicious u...	New Engl. ...	182:254
2	Laszlo; Snook...	1991	Unconscious punning a...	Jung &c	
3	LaFièvre	1992	Why Nothing is Funny: A Deconstructio...		
4	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:324
5	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:331
6	Ramasubrama...	1992	Eclectic neurosurgery	Perish	

What you do next depends on your particular word processor. If it is reasonably modern then it should support **drag/drop**. Try for yourself: drag the selected reference from the All References window to your word processor window, dropping it at the end of the sentence you just typed. If your word processor supports drag-and-drop, a placeholder should now appear:

These findings have been confirmed. [[4 (Ramasubramanian & Martin 1979)]]

If dragging doesn't work with your word processor, then you can fall back to **copy/paste**. In Papyrus, with the reference selected in the All References window choose **Copy** from the **Edit** menu. Then switch back to your word processor and **Paste**.

Next we will insert a placeholder citing **three** references. Go ahead and type a few more sentences in your word processor "manuscript." Now return to Papyrus and select three references in the All References window:

All References					
8 items					
<input type="radio"/> Alphabetic <input checked="" type="radio"/> Numeric					
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items					
<a href="#">Links window</a> <a href="#">Preferences...</a>					
1	Runson; Roge...	1990	The judicious u...	New Engl. ...	182:254
2	Laszlo; Snook...	1991	Unconscious punning a...	Jung &c	
3	LaFièvre	1992	Why Nothing is Funny: A Deconstructio...		
4	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:324
5	Ramasubrama...	1979	Eclectic neuros...	JAMA	280:331
6	Ramasubrama...	1992	Eclectic neurosurgery	Perish	
7	Humor as fiction		Chapter 1		

Remember: hold down the **Shift** key while clicking with your mouse to select a **contiguous** block of references; hold down the **⌘** key while clicking to make a **non-contiguous** selection.

Using either drag/drop or copy/paste, bring this selection of references into your word processor manuscript:

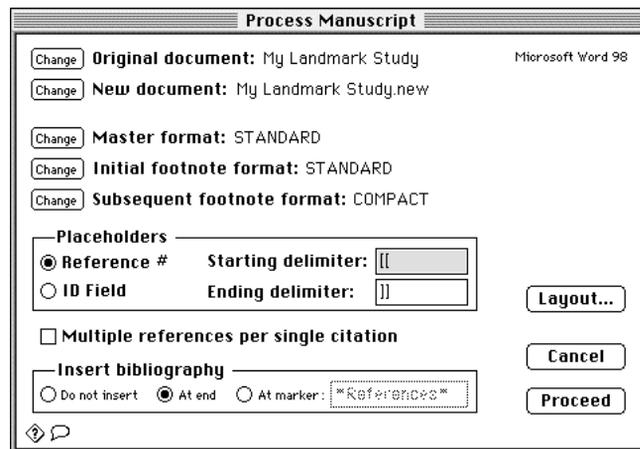
A number of silly studies have made such claims. [[1 (Runson & Rogerstein 1990); 3 (LaFièvre 1992); 6 (Ramasubramanian 1992)]]

---

Now save your word processor document, and then **close** the document's window. (If your document is left open in your word processor, Papyrus might not be allowed to access it in our next step.)

## Processing the manuscript

Now that you have created, saved, and closed your magnum opus, switch back to Papyrus and from the **Group** menu pick **Process Manuscript...** Papyrus will ask you to point out your word processor manuscript. Once you have done so, you will be presented with this dialog:



Note that Papyrus automatically suggests a name for the new copy of your word processor document that is about to create. By default, Papyrus simply appends new to the end of the name of your original document. If you would prefer some other name, click the corresponding Change button.

In the upper right corner of the dialog Papyrus identifies the document's creating word processor (in our example above we have chosen a fairly obscure word processor from a small company in the western U.S.). If you see **Unrecognized document type**, then you have used a word processor that Papyrus does not currently understand.

Unfortunately, at this time one such unsupported word processor is **AppleWorks** (formerly **ClarisWorks**). We have made repeated attempts to convince Apple to share the AppleWorks file format with us, but for no clear reason Apple has refused to do so. Should that decision ever be changed, we look forward to adding full AppleWorks support to Papyrus.

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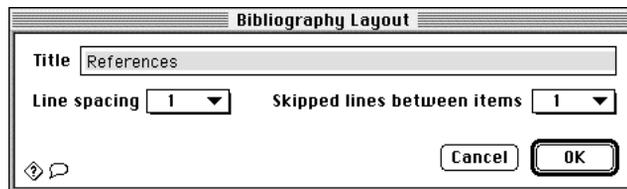
In the meantime, should you chose to complain about this situation to your friend at a major Macintosh magazine, or to your aunt who sits on Apple's board of directors, who would I be to limit your freedom of speech?

Having established the document that Papyrus is about to process, we must next tell Papyrus which **output format** it is to use for this manuscript. The suggested **STANDARD** format is unlikely to satisfy any editor. So click the **Change** button beside **Master format**.

Papyrus will present a list of the output formats you have so far added to your database. Pick any one you like—I'd suggest you avoid the three built-in formats—and click the **Select** button.

For now, we are not going to concern ourselves with the **Initial footnote format** nor the **Subsequent footnote format**. The remaining options regarding placeholders and inserting the bibliography are also fine for now.

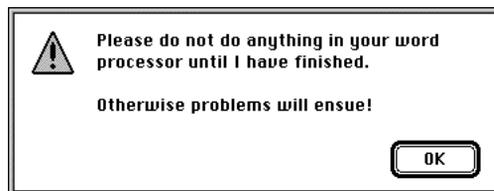
Click the **Layout...** button. The resulting dialog should look familiar to you:



This is just a simplified version of the usual Papyrus dialog for printing or exporting a list of references. The usual questions about base font, margins, headers, *etc.* are missing, since these details will be determined by the word processor document into which Papyrus is about to insert this bibliography.

Change anything here that you wish, then click **OK**. Now in the Process Manuscript dialog click **Proceed**.

Papyrus will open a new Group window for your bibliography. What happens next depends on your word processor. For some word processors (such as Word 5) Papyrus simply makes its own revised copy of your manuscript. With others (including Word 6, Word 98, and Nisus Writer) Papyrus actually uses your word processor as a tool to perform the revisions. In these cases you will see:



---

You should heed this warning!

Depending on the word processor involved, you may next be treated to a bit of a show as Papyrus jumps back and forth to your word processor to process your document.

When the smoke clears, Papyrus will have filled in your new Group with the appropriate references, in the appropriate order. In your word processor you can now view the newly created copy of your manuscript, and confirm that the placeholders have been replaced with the correct in-text citations, and that the bibliography appears at the end of the document, in the right format.

## Common special cases

After you have inserted a placeholder into your manuscript, circumstances might require you to type a few extra characters inside that placeholder. Here are a few of the more common such situations.

### Citing just the year

Often you will wish to display only the citation's year, because its authors have already been mentioned in the text. For example:

...as LaFièvre has pointed out (1992)...

To accomplish this, insert the letter `y` (or `Y`, if you prefer) immediately after the starting delimiter. This stands for **year only**. Thus, to generate the preceding line you would include in your manuscript:

...as LaFièvre has pointed out `[[y 3 (LaFièvre 1992)]]`...

This also works for multiple citations. This:

...as LaFièvre has pointed out `[[y 3 (LaFièvre 1992); 27 (LaFièvre 1985)]]`...

becomes:

...as LaFièvre has pointed out (1985, 1992)...

### Additional text

Sometimes you will need to include some additional text within a citation. For example:

...as we have seen (especially in Laszlo *et al.* 1991, but also in LaFièvre 1992)...

You can specify such text within your placeholder by using **curly braces** `{...}`:

---

...as we have seen [[(especially in }2 (Laszlo et al 1991){, but also in }3 (LaFièvre 1992)]]...

## Page numbers

Usually you can use this same technique for citing particular pages within a work. For example, to end up with:

...although there is some disagreement on this point (LaFièvre 1992, p. 17)...

you would begin with:

...although there is some disagreement on this point [[3 (LaFièvre 1992){, p. 17}]]...

There are, however, sometimes more complicated situations. We'll cover those elsewhere.

## Inserting formatted references

### Inserting formatted references automatically

In some cases you will want Papyrus to convert a placeholder in your manuscript not to a superscripted number or a parenthetical author-year citation, but rather to a **formatted reference**. For example, perhaps you need to include a reference in a bottom-of-the-page footnote. Or maybe you'd like a complete reference to appear in the caption of a table.

Inserting the letter f (or F) immediately after the starting delimiter of a placeholder tells Papyrus to replace the placeholder with a formatted citation.

You might recall that the Process Manuscript dialog specifies two formats besides the "master" format:

- Master format:** STANDARD
- Initial footnote format:** STANDARD
- Subsequent footnote format:** COMPACT

Most style books that describe the use of footnotes present two different sets of rules for formatting the footnotes: one set for the first time a given reference is cited, another for subsequent citations of the same reference. For example, an initial citation might appear in the form:

H. LaFièvre, *Why Nothing is Funny: A Deconstructionist Analysis*, 2nd ed. (Cambridge: Harvard University Press, 1992), 43.

---

while a subsequent citation to this reference in the same manuscript would be much abbreviated:

LaFièvre, *Why Nothing is Funny: A Deconstructionist Analysis*, 52.

When you use a placeholder with an f, Papyrus will automatically substitute either the “Initial” or the “Subsequent” format you have specified, depending on whether this is the first appearance of a particular reference in your manuscript.

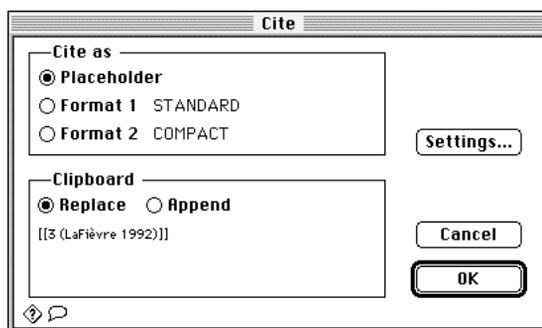
Of course, the examples above are not in STANDARD and COMPACT format. They are based on the **Turabian** formats for footnotes, which will be familiar to most graduate students. The corresponding predefined Papyrus output formats are named **TUR FOOT1** and **TUR FOOT2**.

## Inserting formatted references manually

Sometimes you simply want to paste a formatted reference directly into a word processor document, without worrying about Process Manuscript. Sometimes you need to quickly paste a couple of references into an e-mail you’re sending to a colleague.

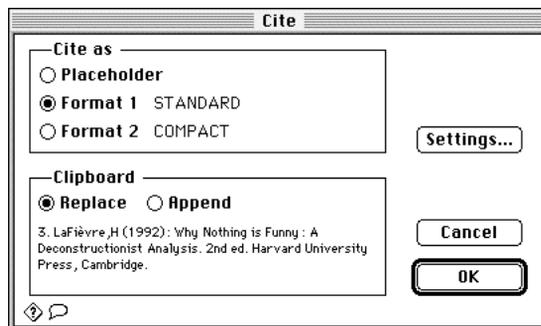
Now I must tell you a secret. Every time in this chapter I have told you to drag/drop or copy/paste a reference from Papyrus to your word processor, you have actually been taking advantage of a *shortcut* in Papyrus. It is now time for you to learn the rest of the story.

In Papyrus, select a reference in the All References window, or in a Group window. From the **Reference** menu pick **Cite...**



If you click **OK** at this point, Papyrus will insert the usual placeholder for this reference into the clipboard. You can see a preview of that placeholder here in the lower portion of the Cite dialog. The effect, in other words, will be identical to what you’ve been accomplishing by simply copying a reference in Papyrus and then pasting it into your word processor.

But now click the **Format 1** button:



As the preview demonstrates, if you click **OK** now, the clipboard will contain the full reference, in **STANDARD** format. Try it for yourself—click **OK**, switch to your word processor, and paste.

As you have probably guessed, clicking **Settings...** takes you to a dialog in which you can specify the two formats to be offered by the Cite dialog. You can also indicate several other preferences. A full explanation of the options available in the Cite Settings dialog is available in the *Citing references* chapter of the **REFERENCE** section.

---

## See Also...

You now understand the basics of **inserting placeholders** for references into your manuscripts, and using **Process Manuscript** to simultaneously convert these to the appropriate in-text forms and append the finished bibliography to the manuscript.

Papyrus includes a number of additional options for coping with the many special cases that can arise in preparing a manuscript. For all the details, you will want to read the next two chapters of the **WORKBOOK**, as well as the **REFERENCE** chapters indicated below.

See also:

### CONCEPTS

- Bibliographies vs. Footnote Lists*
- Output Formats*
- Bibliographic Conventions*
- Groups*

### REFERENCE

- Citing References*
- Process Manuscript*

### SHORTCUTS

- Cite Dialog*

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## CHAPTER 12

### Specific Pages

Introduction .....	W130
The usual approach .....	W130
The perverse approach .....	W131
Modifying your output format .....	W132
See Also.....	W133

---

## Introduction

*Almost* all bibliography editors agree that when your bibliography includes an entry for a lengthy work, such as a book or monograph, the bibliography entry should refer to the *entire* work and not to some particular page or pages of interest.

It is therefore within the manuscript's **in-text citation** that specific pages are mentioned:

...though not everyone agrees with this finding (LaFièvre 1990, p. 27).

or:

...though not everyone agrees with this finding.<sup>3(p.27)</sup>

Every now and then, though, you will encounter a bibliographic style that instead expects you to include specific pages within the bibliography entry itself:

3. LaFièvre, H. (1990): A Refutation of Antideconstructionism, 3rd ed. Harvard University Press, Cambridge. p. 27.

This can lead to ugly situations. Suppose that later in your manuscript you refer to a different page from the same book. You will now have to create a *second* entry in your bibliography that refers to this other page:

3. LaFièvre, H. (1990): A Refutation of Antideconstructionism, 3rd ed. Harvard University Press, Cambridge. p. 27.

...

19. LaFièvre, H. (1990): A Refutation of Antideconstructionism, 3rd ed. Harvard University Press, Cambridge. p. 92.

Still, there are some bibliography editors who seem to prefer this sort of redundancy to cluttering up their in-text citations.

## The usual approach

When you use Papyrus's Process Manuscript function to automatically scan your word-processor manuscript, you can include specific page numbers in the in-text **placeholder**:

...though not everyone agrees with this finding [[42 (LaFièvre 1990){, p. 27}]].

This is actually just an application of the more general ability to include any sort of **additional text** within a placeholder. The text within the curly braces will be maintained in the new in-text citation:

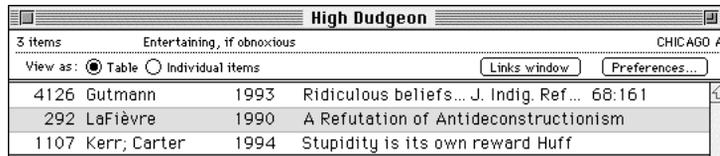
...though not everyone agrees with this finding (LaFièvre 1990, p. 27).

---

## The perverse approach

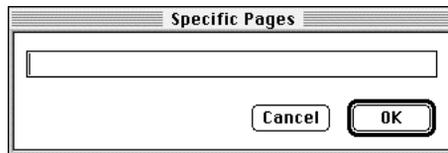
To satisfy those few editors who prefer to see all page numbers relegated to the bibliography itself, Papyrus provides both a manual and an automatic solution.

If you are manually assembling a Group, you can indicate that a particular item refers to specific pages of a reference. First, select the relevant item in the Group window:

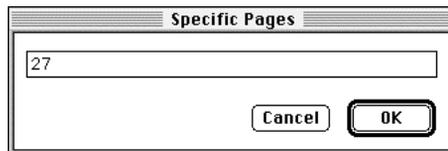


High Dudgeon				
3 items		Entertaining, if obnoxious		CHICAGO A
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items				
4126	Gutmann	1993	Ridiculous beliefs... J. Indig. Ref...	68:161
292	LaFievre	1990	A Refutation of Antideconstructionism	
1107	Kerr; Carter	1994	Stupidity is its own reward Huff	

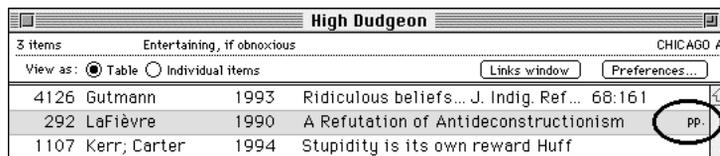
Then choose **Specific Pages...** from the **Group** menu. This will produce a dialog box:



Fill this in:



and click Okay. An indicator will now appear in the Group window to confirm that this item is citing specific pages:



High Dudgeon				
3 items		Entertaining, if obnoxious		CHICAGO A
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items				
4126	Gutmann	1993	Ridiculous beliefs... J. Indig. Ref...	pp.
292	LaFievre	1990	A Refutation of Antideconstructionism	
1107	Kerr; Carter	1994	Stupidity is its own reward Huff	

If later you need to change these specific page numbers, or remove them, you can again choose **Specific Pages...** to bring back the above dialog. There you can change or erase the page numbers.

---

Later when you tell Papyrus to create a bibliography from this Group, the specific pages will appear there:

LaFièvre, H. *A Refutation of Antideconstructionism*. 3rd ed. Cambridge: Harvard University Press, 1990. p. 27.



You can also insert specific page numbers into your bibliography when you use the **Process Manuscript** function to automatically scan your word-processor manuscript.

To accomplish this, insert the letter P after the reference in your placeholder, followed by the specific page numbers:

...though not everyone agrees with this finding [[42 (LaFièvre 1990)p27]].

## Modifying your output format

Regardless of whether you specify these page numbers manually or automatically, for them to actually appear in the final bibliography you must be sure to use an **output format** that explicitly includes the **Specific pages** field. For example, if we look at the Book template of the CHICAGO A format, we do not see any mention of **Specific pages**:

```
[ Author ], "Authors" role ]. [ Book Title ]. [
Series Title [ , edited by Editor ] [ ,
Place in Series ]. [ Edition ed. ] [ Vol.
Volume. ] [ Total # Volumes vols. ] [
Additional information. ] [ City of Pub. : Publisher ,
Year. ] [ Also Print. ] [ ]
```

So to produce a bibliography that resembles CHICAGO A but that will also mention specific page numbers where appropriate, we must modify the output format:

```
[ Author ], "Authors" role ]. [ Book Title ]. [
Series Title [ , edited by Editor ] [ ,
Place in Series ]. [ Edition ed. ] [ Vol.
Volume. ] [ Total # Volumes vols. ] [
Additional information. ] [ City of Pub. : Publisher ,
Year. ] [ Also Print. ] [ Specific pages. ] [ ]
```

---

	<input type="checkbox"/> Suppress if non-numeric	
<b>Specific pages</b>	<input type="radio"/> <b>Full</b>	("132-137", "200-203", "411-412", "1395-1398")
	<input type="radio"/> <b>Simple</b>	("132-7", "200-3", "411-2", "1395-8")
	<input checked="" type="radio"/> <b>Chicago</b>	("132-37", "200-203", "411-12", "1395-98")
	<input type="radio"/> <b>MLA</b>	("132-37", "200-03", "411-12", "1395-98")
	<input type="radio"/> <b>Oxford</b>	("132-7", "200-3", "411-12", "1395-8")
	<input checked="" type="checkbox"/> <b>Spell "p./pp.":</b>	<input type="text" value="p./pp."/>

## See Also...

As you have learned, dealing with citations to specific pages can be simple or complex, depending on the demands of your editor. Either way, though, Papyrus can help you through the task.

---

## See also:

### CONCEPTS

*Bibliographies vs. Footnote List*  
*Output Formats*  
*Bibliographic Conventions*  
*Groups*

### REFERENCE

*Citing References*  
*Process Manuscript*  
*Template Entry*

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CHAPTER 13

## Citing References Together

Introduction .....	W136
Manual approach .....	W136
Automatic approach .....	W138
See Also.....	W139

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## Introduction

Some editors in fields such as chemistry or physics, as well as those of a few other crowded journals such as *Science*, apparently feel compelled to squeeze as much text as possible onto every page. So when these editors see several references being cited at a single point in a manuscript, they expect you to **combine** all of them into a single item in the bibliography:

...but completely contradictory results have also been shown.<sup>12</sup>

12. M. A. Spoon, *Cancer Res.* **31**, 4819 (1987); L. U. Wartsburg, *Cell* **82**, 234 (1990); A. Cramer, *CA Cancer J. Clin.* **47**, 15 (1997).

This approach is understandable, I suppose, but it can lead to some complications. For example, suppose that later in the above-excerpted manuscript another sentence refers to just one of these three references. Since our parsimonious editors would certainly object to listing the same reference twice in a bibliography, we must now pull the commonly-cited work out of the original citation:

...but completely contradictory results have also been shown.<sup>12,13</sup>

...Meanwhile, one group did indeed confirm these findings.<sup>12</sup>

12. L. U. Wartsburg, *Cell* **82**, 234 (1990).

13. M. A. Spoon, *Cancer Res.* **31**, 4819 (1987); A. Cramer, *CA Cancer J. Clin.* **47**, 15 (1997).

There is also a question of how to **sort** the references within one of these multiple citations. My impression is that they are to be listed in chronological order, but I have never seen this rule stated explicitly.

As you have perhaps surmised, Papyrus can handle all of this.

## Manual approach

When you prepare a **Group** of references, you can manually indicate that some of them are to be cited together in the resulting bibliography.

First, select the references that are to be cited together:

Unusual approaches					
18 items		Hardware stores as biology supply houses			SCIENCE
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items		Links window		Preferences...	
4130	Kaeser	1989	Freeze-substituti...	J. Microsc.	154:273
699	Nicklas; Lee; R...	1989	Mechanically cut ...	J Cell Sci	94:415
698	Nicklas	1989	The motor for pol...	J. Cell Biol.	109:2245
693	Green; Bauer	1977	Analysing the cha...	J. Theor. Biol.	68:299
3483	Le Van; Kuraish...	1994	Aluminum-induce...	Plant Physiol.	106:971
3495	Langdale	1994	More knots untied	Curr. Biol.	4:529
691	Brown; Dunn	1989	Microinterferome...	J Cell Sci	92:379
2069	Spoon	1987	Successful use of...	Cancer Res.	31:4819
523	Wartsburg	1990	Turpentine - use...	Cell	82:234
2942	Cramer	1997	Paint thinner wor...	CA Cancer J...	47:15
714	Burgess	1970	Cell shape and mi...	Proto	95:72
4131	Hyde; Lancelle;...	1991	Freeze substituti...	J Cell Sci	100:735
709	Bajer	1973	Interaction of mi...	Cytobios	8:139
4132	Van De Kant - B	1988	Microwave-aided	Histochemic	20:335

Then choose **Cite Together** from the **Group** menu. Papyrus will mark these references to indicate that they will be cited together in the bibliography:

Unusual approaches					
18 items		Hardware stores as biology supply houses			SCIENCE
View as: <input checked="" type="radio"/> Table <input type="radio"/> Individual items		Links window		Preferences...	
4130	Kaeser	1989	Freeze-substituti...	J. Microsc.	154:273
699	Nicklas; Lee; R...	1989	Mechanically cut ...	J Cell Sci	94:415
698	Nicklas	1989	The motor for pol...	J. Cell Biol.	109:2245
693	Green; Bauer	1977	Analysing the cha...	J. Theor. Biol.	68:299
3483	Le Van; Kuraish...	1994	Aluminum-induce...	Plant Physiol.	106:971
3495	Langdale	1994	More knots untied	Curr. Biol.	4:529
691	Brown; Dunn	1989	Microinterferome...	J Cell Sci	92:379
2069	Spoon	1987	Successful use of...	Cancer Res.	31:4819
523	Wartsburg	1990	Turpentine - use...	Cell	82:234
2942	Cramer	1997	Paint thinner wor...	CA Cancer J...	47:15
714	Burgess	1970	Cell shape and mi...	Proto	95:72
4131	Hyde; Lancelle;...	1991	Freeze substituti...	J Cell Sci	100:735
709	Bajer	1973	Interaction of mi...	Cytobios	8:139
4132	Van De Kant - B	1988	Microwave-aided	Histochemic	20:335

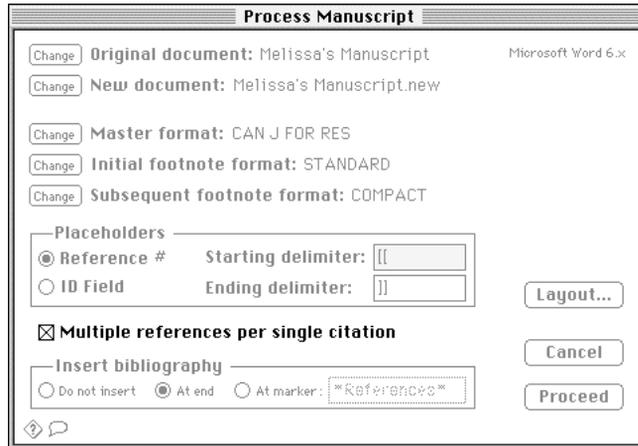
If later you decide to cite these references as separate entries in the bibliography after all, you can select one or more of them and choose **Cite Separately** from the **Group** menu.

Of course, this entire discussion applies only to Groups that are sorted in **Citation Order**. If your bibliography were to be sorted in, say, alphabetic order, then you certainly wouldn't be asked to combine multiple references into a single bibliography entry.

---

## Automatic approach

When you use the **Process Manuscript** function to automatically scan your word-processor manuscript, you can tell Papyrus to cite multiple references together:



The screenshot shows the 'Process Manuscript' dialog box with the following settings:

- Original document:** Melissa's Manuscript (Microsoft Word 6.x)
- New document:** Melissa's Manuscript.new
- Master format:** CAN J FOR RES
- Initial footnote format:** STANDARD
- Subsequent footnote format:** COMPACT
- Placeholders:**
  - Reference # Starting delimiter: {{
  - ID Field Ending delimiter: }}
- Multiple references per single citation**
- Insert bibliography:**
  - Do not insert
  - At end
  - At marker: \*References\*

Buttons: Layout..., Cancel, Proceed

Papyrus will automatically combine references as described above, sorting each set in chronologic order. Where necessary Papyrus will also pull out commonly-cited references and give them their own separate bibliography entries.

If for some reason you do not want Papyrus to chronologically sort a given set of combined references, use the **suppress sorting** option in that placeholder.

---

## See Also...

Most of you will never need to worry about the issues discussed in this chapter. But if you publish in chemistry, physics, or another field in which journal editors like to cram everything into as few bibliographic entries as possible, you know now how to satisfy such whims.

---

## See also:

### CONCEPTS

*Bibliographies vs. Footnote Lists*  
*Output Formats*  
*Bibliographic Conventions*  
*Groups*

### REFERENCE

*Group Window*  
*Process Manuscript*



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## CHAPTER 14

# Keyword Links

Introduction .....	W142
Creating a link .....	W142
Removing a link .....	W145
Links in the Keywords window .....	W146
Searches .....	W147
See Also.....	W149

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## Introduction

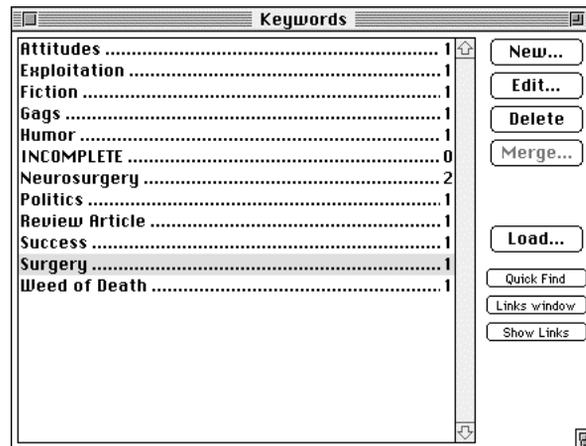
Papyrus lets you establish **links** between your keywords. For example, you can declare that one keyword represents a **sub-category** of another keyword. You can tell Papyrus that two keywords are **synonyms**, or even **antonyms**. Or you can indicate any other relationship you desire.

There are two things you can do with these links. First, when you perform a **search** based on keywords you can tell Papyrus to follow some or all keyword links. For example, a search on the keyword **Cute fuzzy animals** would succeed in finding a reference lacking that particular keyword but bearing the keyword **Koala** (assuming that you had previously linked those two keywords).

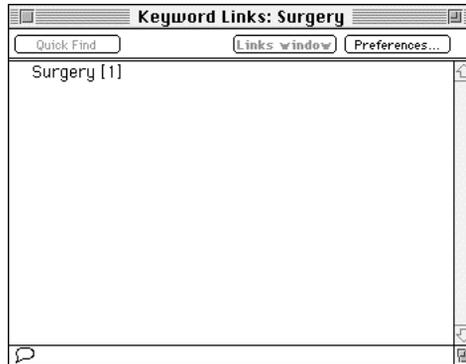
The other main use of keyword links is to help you in **choosing keywords** to assign to a new reference, or to use in a search. The Keywords window can be set to automatically display links as you browse through your list of keywords. So as you consider a particular keyword, you'll be reminded of other keywords that might be more specific or otherwise more appropriate.

## Creating a link

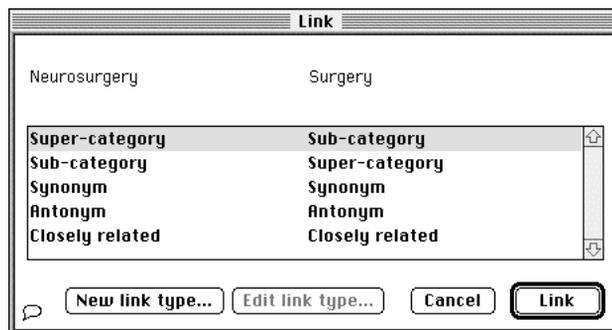
Let us begin by opening the Keywords window:



We are going to link **Surgery** and **Neurosurgery**. Begin by selecting either one of these, and then click the **Links window** button. A Keyword Links window will open for your selected keyword:

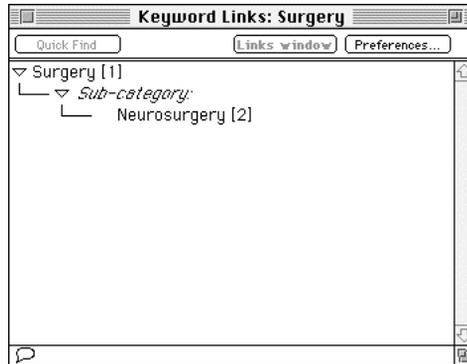


Now select the other keyword in the Keywords window, and drag it to the Keyword Links window. This dialog will appear:



Here is where we indicate the nature of our new link. The first choice of link types would be appropriate if Neurosurgery were a super-category of Surgery. But the reality is just the opposite. So with your ↓ key or your mouse select the *second* link type, which indicates that Neurosurgery is the sub-category and Surgery the super-category. Then click the **Link** button.

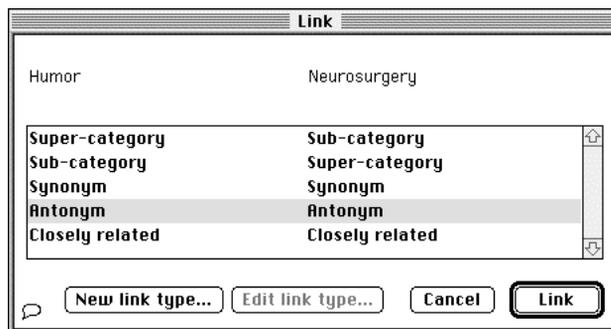
The Keyword Links window now displays our new link:



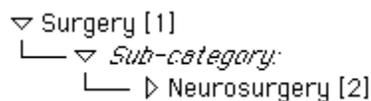
The numbers in brackets are the same numbers that appear in the Keywords window—they indicate how many references in your database cite each of these keywords.

Let's go a bit further here. Since there is nothing funny about neurosurgery, drag Humor from the Keywords window to the Keyword Links window—but be careful to drop it directly onto Neurosurgery rather than elsewhere in the window. Our new link is to be with Neurosurgery, not Surgery.

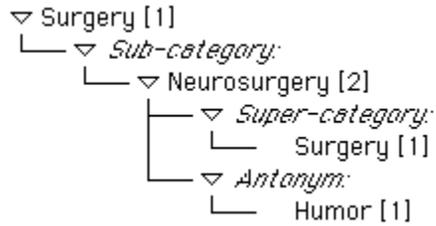
When asked, indicate that these are **antonyms**:



In the Keyword Links window, a triangle now appears next to Neurosurgery, indicating that this keyword has links of its own (besides the implied back-link to Surgery):



Click that triangle and all of Neurosurgery's links will be displayed:



In other words:

Surgery has one link—to a sub-category, Neurosurgery.

Neurosurgery has two links. The first is a link to a super-category, Surgery—this is actually the same link as the one from Surgery to Neurosurgery, seen from the other end. The second of Neurosurgery’s links is to an antonym, Humor.

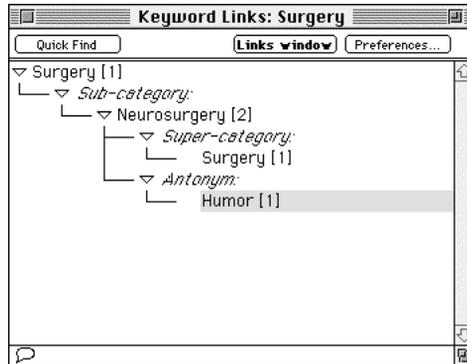
So to create a link between two keywords the steps are:

- Open a Keyword Links window for one of the two keywords.
- Drag the other keyword to that Keyword Links window.
- Pick the appropriate link type.

## Removing a link

Linking Humor to Neurosurgery has a certain appeal, but we’d better remove that link to keep our database appropriately serious.

In the Keyword Links window, select Humor:



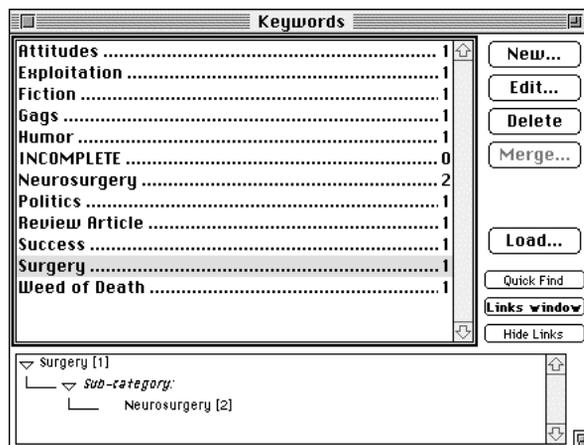
Now press your Delete key, or choose **Clear** from the Edit menu.

That's all there is to it. The link has been erased.

We are done with this Keyword Links window for now. Please close it.

## Links in the Keywords window

In the Keywords window click the **Show Links** button. Then select one of our linked keywords:



The pane in the lower part of the window is a miniature rendition of a Keyword Links window for whichever keyword is selected in the upper pane. You can switch between the panes with

---

your **Tab** key, and when the lower pane is active your **↑** and **↓** keys will do what you'd expect. Of course, you can also use your mouse to select keywords in the lower pane, or to click the little triangles there.

If you select a keyword in the lower pane, the **Edit...**, **Delete**, **Select**, **Quick Find** and **Links Window** buttons all work as usual. You can also drag a keyword from the lower pane to another window, just as you can from the upper pane.

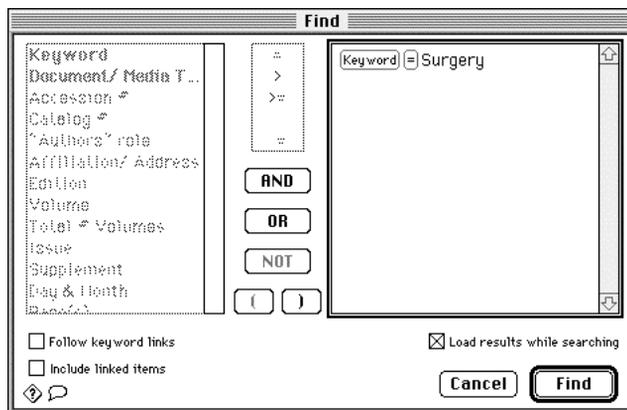
So now when you are considering a keyword for inclusion in a search or for addition to a reference, you can easily view all of its linked keywords and think about using one of them instead of, or in addition to, the original keyword.

To get rid of the lower pane, click the **Hide Links** button.

## Searches

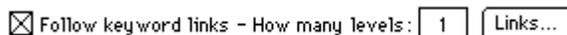
Now let's see if we can put these fancy links to use, shall we? We'll perform the same keyword search twice, first ignoring links and then using them.

From the **Reference** menu choose **Find...** Run this search:



Papyrus will find the one reference bearing the keyword Surgery. So far, so good.

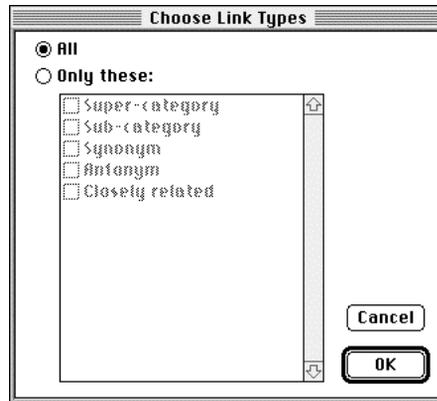
Now choose **Find...** again and set up the same search. But this time click the **Follow keyword links** checkbox. A few new items will appear:



---

This question about “levels” relates to the number of links you want Papyrus to traverse. For example, if Surgery has the sub-category Neurosurgery, and Neurosurgery in turn has a link to the sub-category Laminectomy, then following only 1 level of keyword links would pick up any references with Neurosurgery but not those bearing only Laminectomy. Following 2 levels would pick up all of these references.

Click the **Links...** button. Papyrus now asks which types of link you wish to follow:



The default setting is to follow any and all links. If you instead choose **Only these:** then you can pick which types of link to follow. For example, you might wish to exclude antonyms from your search.

Click the **OK** button, and then click the **Find** button to proceed with your search. This time Papyrus will find not only the one reference bearing the keyword **Surgery**, but also a second reference that lacks this keyword but which does cite the linked keyword **Neurosurgery**.

---

## See Also...

The techniques you've just learned for creating links between keywords allow you to create not just a **hierarchy** of terms and subterms, as you might find in many library or online database systems, but a complex **web** of interconnections.

You can review the indicated CONCEPTS chapters for more about the possibilities here. The REFERENCE and SHORTCUTS chapters provide some further details on manipulating keyword links.

---

### See also:

#### CONCEPTS

*Keywords*

#### REFERENCE

*Keywords Window*

*Keyword Links Window*

#### SHORTCUTS

*Keyword Links Window*



---

## CHAPTER 15

### Reference Links

Introduction .....	W152
Creating a link .....	W152
Removing a link .....	W154
The Links window .....	W154
Searches .....	W155
Printing .....	W156
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---

## Introduction

In the last chapter you learned about creating and using links between **keywords**. Papyrus also lets you establish links between **references**.

One type of a reference link that we've already covered in the **WORKBOOK** is to link a reference to **notecards**.

Another use of reference links would be to link a reference to another reference that is a **review** or **commentary** on the first. You might also choose to link a newer study to an older one with a link indicating **follow-up** or **confirming study** or **refutation**.

Some people use references to trace the history and sociology of a field of scholarship. For this type of work, it might be useful to link references to indicate that the primary author of one was a **student** of the primary author of the other.

---

**Reference linking is a new concept for bibliographic database programs. We look forward to hearing what uses you find for it!**

---

As with keyword links, when you perform a **search** you can tell Papyrus to follow some or all reference links. Papyrus will find all references based on your search criteria, and then also include in the results all related references (notecards, reviews, commentaries, etc.)

Similarly, any time you have Papyrus **print or export** some references, you can also direct it to include linked references.

## Creating a link

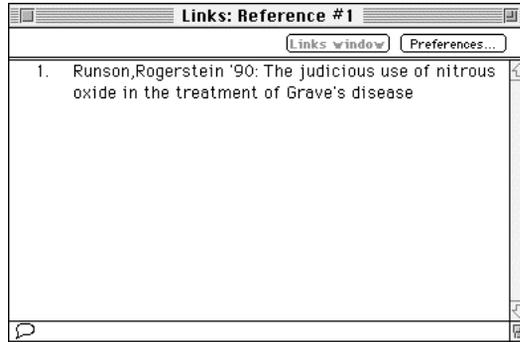
Let us link together two of our references. Specifically, this one:

2. Laszlo,JA; Snooks,Barbara B; Old,DH (1991): Unconscious punning among medical researchers. In: Sublimation and Compensation. (Jung,CG; Old,DH, eds.) Pergamon Press, New York, 102–129.

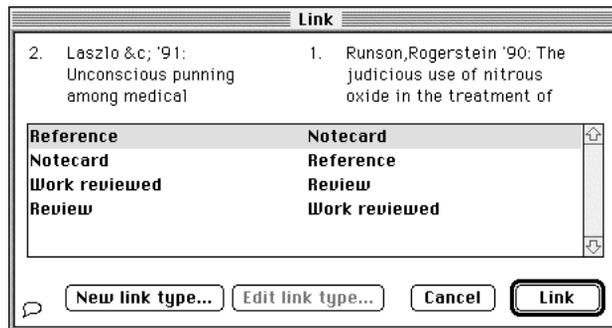
is a **review** article that cites this one:

1. Runson,SK; Rogerstein,BT (1990): The judicious use of nitrous oxide in the treatment of Grave's disease. New Engl. J. Med. 182, 254–267.

Open the All References window and select Reference #1. Then click the Links window button. This new window will appear:



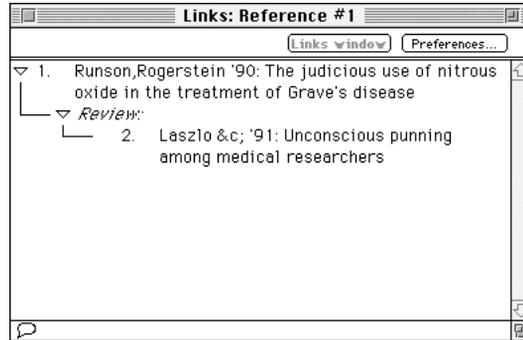
Now return to the All References window and select Reference #2. **Drag** this reference to the Links window to tell Papyrus that you wish to link the two references. Papyrus will ask what **type** of link you intend:



We want to pick the fourth choice, which indicates that Laszlo *et al.* is a **review**, and Runson & Rogerstein the **work reviewed**. So select this fourth choice and click the **Link** button.

These two link types—Reference/Notecard and Review/Work reviewed—are already defined for all Papyrus databases. You can create your own additional link types by clicking the **New link type...** button.

In the Links window, Papyrus now displays your new link:



So to create a link between two references the steps are:

- Open a Links window for one of the two references.
- Drag the other reference to that Links window.
- Pick the appropriate link type.

## Removing a link

Getting rid of a link between references is quite easy. In the current Links window, use your mouse or arrow keys to select Reference #2. Then press your **Delete** button, or choose **Clear** from the **Edit** menu. Voilà—the link is gone.

But for now let's restore the link. From the **Edit** menu choose **Undo Clear**.

## The Links window

You can manipulate the references in a Links window much as you would in the All References window or in a Group window. If you select a reference you can **edit** it, either via the **Reference** menu or with the usual **Option-double-click** shortcut. You can **delete** a reference from your database, or **cite** it in a manuscript. You can also use the Links window button to open another Links window for any of the references.

The default format used in the Links window is **COMPACT**. You can switch between this format and **STANDARD** by **double-clicking** a reference.

Double-click the  button to see what else you can do in the Links window.

---

## Searches

Now let's confirm that our new link behaves correctly during a search.

Choose **Find...** from the **Reference** menu. Tell Papyrus to search for:

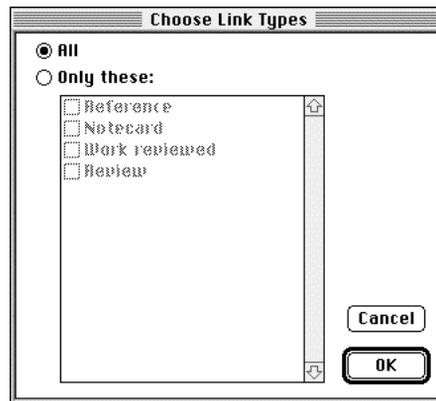
Author = runson

Now check the Include linked items checkbox. Some new items will appear:

Include linked items - How many levels:

Telling Papyrus to follow **1 level** of links means that we want to see the references that are linked directly to those found by the search. If we changed this to 2 levels we would also get the references linked to *those* references.

You can control what **types** of links Papyrus will follow. Click the **Links...** button and this dialog appears:



The default setting is to follow *all* types of links. If you click **Only these:** then you can pick exactly which link types are relevant.

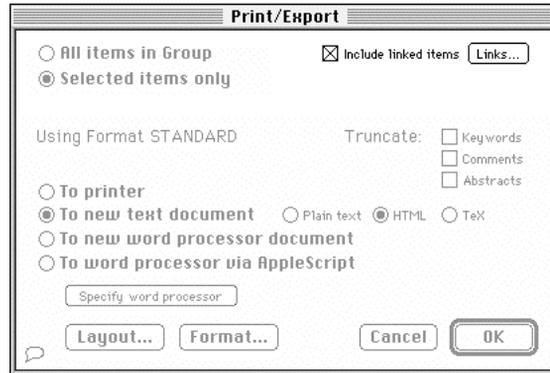
For now click **OK** to accept the default. Then click the **Find** button to run your search.

The result of your search should indeed include not only the one reference with Runson as an author, Reference #1, but also the reference linked to that one, Reference #2.

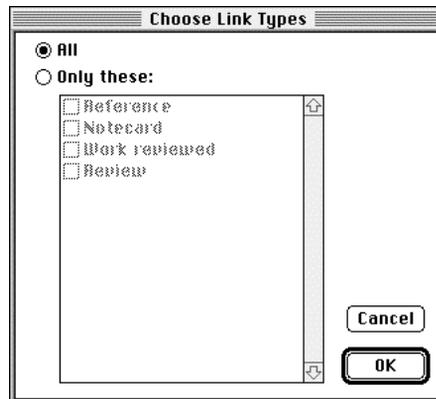
---

## Printing

When you print or export references, you can tell Papyrus to also include linked references in your output:



Clicking the Links... button brings up a dialog you've seen before:



As with searches, you can tell Papyrus to include *all* linked references, or else you pick the specific types of links you wish to follow.

Unlike with searches, you cannot have Papyrus print/export more than one **level** of links.

The printed/exported document will indicate links via indentation:

---

## References

1. Runson,SK; Rogerstein,BT (1990): The judicious use of nitrous oxide in the treatment of Grave's disease. *New Engl. J. Med.* 182, 254-267.

### Review:

2. Laszlo,JA; Snooks,Barbara B; Old,DH (1991): Unconscious punning among medical researchers. In: *Sublimation and Compensation.* (Jung,CG; Old,DH, eds.) Pergamon Press, New York, 102-129.

## See Also...

We've just scratched the surface of what you can do with reference links. While many of you will have no need to use these features, we hope they will prove valuable to those of you who are interested in studying the interconnections amongst your data.

---

## See also:

### CONCEPTS

*Notecards and Linked References*

### REFERENCE

*Reference Links Window*  
*Print/Export*  
*Find*

### SHORTCUTS

*Reference Links Window*

---

---

CHAPTER 16

## Cross-Reference List

Introduction .....	W160
Full Author list .....	W161
Partial Keyword list .....	W161
See Also.....	W163

---

## Introduction

The best way to explain this feature is with an example:

### References

#### Fièvre,H

3. LaFièvre '92: Why Nothing is Funny: A Deconstructionist Analysis

#### Laszlo,J A

2. Laszlo &c; '91: Unconscious punning among medical researchers

#### Martin,S

4. Ramasubramanian,Martin '79: Eclectic neurosurgery, Part I: Excision of inhibitions

#### Mull,M

5. Ramasubramanian,Mull '79: Eclectic neurosurgery, Part II: Implantation of healthy attitudes

#### Old,D H

2. Laszlo &c; '91: Unconscious punning among medical researchers

#### Ramasubramanian,S R

6. Ramasubramanian; '92: Eclectic neurosurgery
4. Ramasubramanian,Martin '79: Eclectic neurosurgery, Part I: Excision of inhibitions
5. Ramasubramanian,Mull '79: Eclectic neurosurgery, Part II: Implantation of healthy attitudes

#### Rogerstein,B T

1. Runson,Rogerstein '90: The judicious use of nitrous oxide in the treatment of Grave's disease

#### Runson,S K

1. Runson,Rogerstein '90: The judicious use of nitrous oxide in the treatment of Grave's disease

#### Snooks,Barbara B

2. Laszlo &c; '91: Unconscious punning among medical researchers

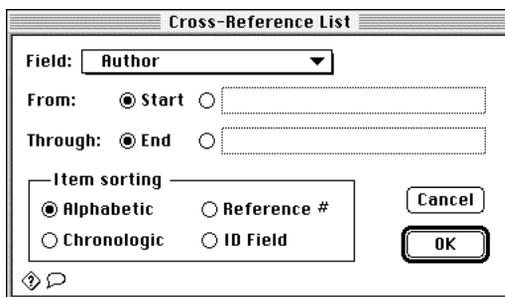
---

This is a cross-reference list by **Author**. As you can see, Papyrus has listed all of the authors in our sample database in alphabetic order. After each author's name, all references by that author are then shown.

Papyrus's **Cross-Reference List** function can produce this sort of list based on Author, Year, Keyword, or any other field that is **indexed** in your database. The most commonly cross-referenced fields are **Author** and **Keyword**.

## Full Author list

To create the list I just showed you, go to the **File** menu and choose **Cross-Reference List...** This dialog will appear:



For now it is indeed the Author field that we wish to cross-reference, so leave the **Field** pop-up menu as is. The **From** and **Through** settings default to starting with the first author in the database and proceeding through the final author, which is also fine for now.

The **Item sorting** section controls the arrangement of each author's batch of references. In the list on the previous page, you can see that the Ramasubramanian references were indeed sorted alphabetically, the default setting here.

Now click **OK**. The usual Papyrus **Print/Export** dialog will open. For my example list I changed the indicated format to **COMPACT**. Go ahead and try printing the list for yourself.

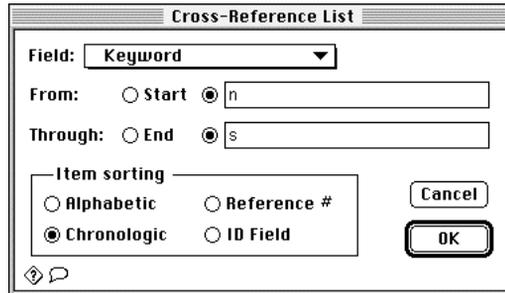
## Partial Keyword list

This time we'll print a cross-reference list based on keywords. But we will limit the list to only those keywords starting with a letter between N and S.

---

This is a rather arbitrary choice of keywords, to be sure. With a real database a more meaningful example might be to stick to keywords beginning with **Neuro**.

So choose **Cross-Reference List...** once more. This time fill in the dialog as follows:



Just for variety, let's set the sorting to **Chronologic**.

Proceed with the Print/Export, and the results should resemble this listing:

## References

### Neurosurgery

5. Ramasubramanian, Mull '79: Eclectic neurosurgery, Part II: Implantation of healthy attitudes
6. Ramasubramanian; '92: Eclectic neurosurgery

### Politics

7. Chapter 1: Humor as fiction

### Review Article

6. Ramasubramanian; '92: Eclectic neurosurgery

### Success

6. Ramasubramanian; '92: Eclectic neurosurgery

### Surgery

5. Ramasubramanian, Mull '79: Eclectic neurosurgery, Part II: Implantation of healthy attitudes

---

## See Also...

**Cross-Reference List...** is pretty much a one-trick pony. But when you do need this sort of list Papyrus makes it very easy for you to obtain it.

---

### See also:

#### CONCEPTS

*Indexes*

#### REFERENCE

*Print/Export*

*Cross-Reference List*



---

## CHAPTER 17

### List with Index

Introduction .....	W166
Producing a List with Index .....	W167
See Also.....	W168

---

## Introduction

Let us begin with an example:

### References

1. Runson,Rogerstein '90: The judicious use of nitrous oxide in the treatment of Grave's disease
2. Laszlo &c; '91: Unconscious punning among medical researchers
3. LaFièvre '92: Why Nothing is Funny: A Deconstructionist Analysis
4. Ramasubramanian,Martin '79: Eclectic neurosurgery, Part I: Excision of inhibitions
5. Ramasubramanian,Mull '79: Eclectic neurosurgery, Part II: Implantation of healthy attitudes
6. Ramasubramanian; '92: Eclectic neurosurgery

**LaFièvre,H:** 3

**Jung,CG:** 2

**Laszlo,JA:** 2

**Martin,S:** 4

**Mull,M:** 5

**Old,DH:** 2

**Perish,N:** 6

**Ramasubramanian,SR:** 4, 5, 6

**Rogerstein,BT:** 1

**Runson,SK:** 1

**Snooks,Barbara B:** 2

What we have here is a normal list of references (in COMPACT format in this case), followed by an **index** of the authors and editors. After each person's name in the index are shown the **Reference #s** of the corresponding references in the list above.

This sort of **reference list with index** is useful when you are publishing a large bibliography by itself—a comprehensive list of references on a given topic, say, or all of the references published by your department in the past year. The reference list itself will be sorted alphabetically or chronologically; the author/editor index will allow readers to locate all publications by a particular person.

---

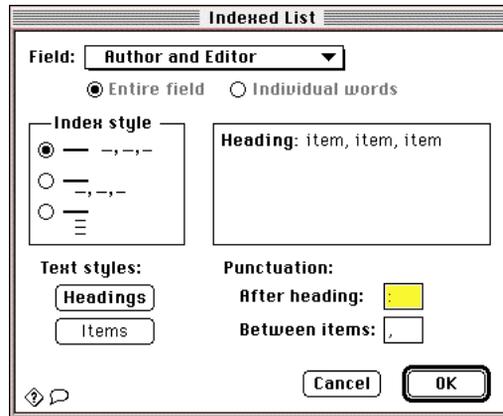
Similarly, a **keyword index** would come in handy in locating precisely those references that relate to a specific subtopic.

Papyrus can create this sort of index for almost any field in your database.

## Producing a List with Index

Begin by selecting the references to be listed. To create the list on the previous page, I opened the All References window and selected References # 1 through #6. You might do the same now.

Then from the **File** menu pick **List with Index...** Here is the resulting dialog:



If you click **OK**, then you can proceed to produce the same list and index that I did. But feel free to experiment with the various settings here. The sample index entry in the dialog will change to reflect your adjustments.

---

## See Also...

**List with Index** is fairly self-explanatory. A few experiments should clear up any questions you may have.

You can find some more details about the various options here in the REFERENCE section.

---

## See also:

### REFERENCE

*Print/Export*

*Indexed List*

---

CHAPTER 18

## Creating New Output Formats

Introduction .....	W170
VANCOUVER .....	W170
CHICAGO A .....	W188
AM ANTIQ.....	W199
TABLE .....	W202
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---

## Introduction

This is the first of a series of chapters that deal primarily with Papyrus **formats**. The following chapters get into increasingly arcane aspects of designing formats for **importing** references into Papyrus. This chapter, though, addresses the more mundane topic of making your bibliographies pretty.

---

**In addition to the examples I'll give in this chapter, remember that we have also provided you with several collections of *predefined* formats, contained in **Format Libraries**. The *Formats, Format Libraries and Predefined Formats* chapter of this **WORKBOOK** explains how to copy formats from these Libraries into your own Papyrus database. Once copied, you can use the format editing features that we are about to discuss to examine these formats in detail.**

---

For a general discussion of formats, be sure to read the *Output Formats* chapter in the **CONCEPTS** section.

In the present chapter I will walk you through the creation of four sample formats: **VANCOUVER**, **CHICAGO A**, **AM ANTIQ** and **TABLE**. Complete versions of the first three can be found in our supplied Format Libraries; each represents a different field of scholarly endeavor. The fourth, **TABLE**, is an example of a Papyrus **tabular** output format.

I have arranged the parts of this chapter in increasing complexity, and you will benefit from working through all of them, even if some do not seem directly relevant to you right now.

## VANCOUVER

The **VANCOUVER** format is the most commonly accepted style for biomedical journals. First created by a group of journal editors in Vancouver, British Columbia, in 1978, the format is documented in a series of publications. The one in front of me right now happens to be:

"Uniform Requirements for Manuscripts Submitted to Biomedical Journals", **JAMA**, March 19, 1997, Vol. 277, No. 11, P. 927

You will find the complete **VANCOUVER** format in our BioMed Format Library.

Here is a sample Article portrayed in the **VANCOUVER** style:

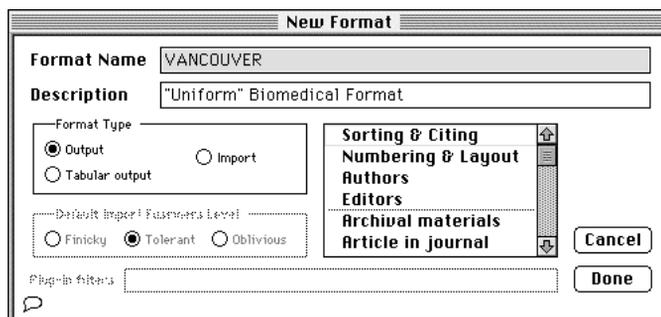
13. Smythe AB, Jones CD. Physiology of the koala. *N Engl J Med* 1978;137:231-5.

This is a very straightforward format, though a bit terse.

• • •

---

In Papyrus, begin by opening the **Formats window** and clicking the **New...** button. In the resulting dialog, fill in the format's **name** and **description** like this:



The Format Type is correctly set to **Output**.

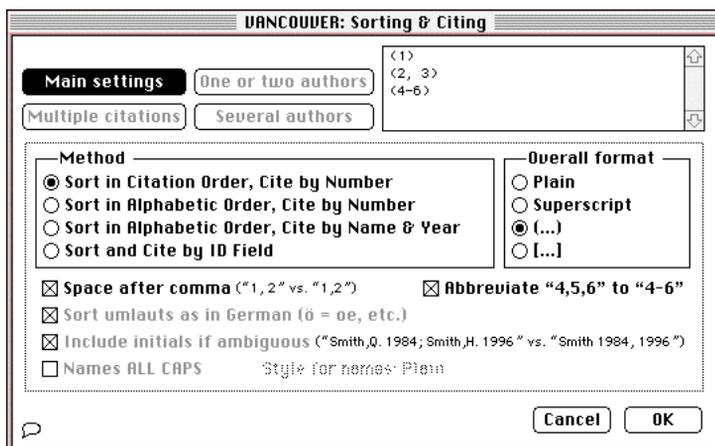
A format consists of several separate, interrelated sections. These are listed in the scrolling list to the right. First are four general sections, which apply to all reference types. Following these are a series of **templates**, one for each reference type.

All output formats need to fill in the four general sections. You will also usually want to define at least the Article, Book and Chapter templates. For the rest, use your judgment. For example, most medical journal styles do not bother specifying what to do for a Map reference.

---

## VANCOUVER: Sorting & Citing

In the scrolling list, double-click **Sorting & Citing**. This will bring up the following dialog:



This dialog establishes how the references will be **sorted** in the bibliography, and the related issue of how they will be **cited** in the text of your manuscripts.

For VANCOUVER, the default settings here are all correct. References appear in the bibliography in the order that they are first cited in the text. The in-text citations should be numbers in parentheses, as illustrated in the samples appearing in the upper right pane of the dialog.

If you are familiar with the biomedical literature, you might have expected me to tell Papyrus to put the in-text citations in superscripts, rather than parentheses. In fact, most of these publications do indeed show the citation numbers superscripted. However, the published rules for the VANCOUVER format indicate that the author's manuscript is to be submitted with the citation numbers appearing in parentheses; the journal's typesetters will then convert these to superscripts.

Of course, these rules were originally promulgated before laser printers had become ubiquitous. If you do use superscripts rather than parentheses in your manuscript, I doubt that the editors will return it to you for correction.

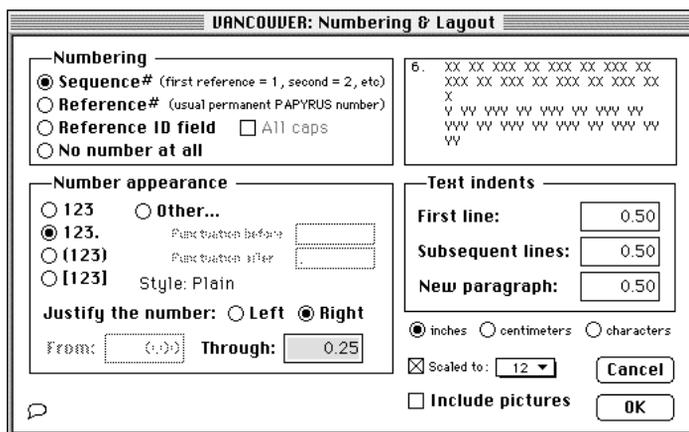
There are a lot of options visible in this dialog, but most of them apply to formats in which the in-text citations are by author and year, rather than number. So we're done—click the **OK** button.

A **checkmark** now appears beside **Sorting & Citing**, indicating that you have dealt with this section of the format.

---

## VANCOUVER: Numbering & Layout

Let's proceed to **Numbering & Layout**. Either double-click that item, or else use your arrow keys to select it and then press Return.



This dialog controls whether the references in the bibliography are to be numbered, and how they should be indented. The default numbering method, **Sequence #**, is correct for VANCOUVER.

The **Reference #** choice would never be used with a normal output format—few readers will be interested in the numbers you've assigned to references in your personal Papyrus database. It does come in handy, though, for formats that you use in conjunction with maintaining your Papyrus database and reference collection. For example, all three built-in formats—STANDARD, COMPACT and BRIEF—display the Reference #.

**Reference ID field** applies to the styles used in certain mathematics, computer science, physics, *etc.* journals. These prefer to cite references by part or all of the first author's name, plus an indication of the year, such as "Smith1997" or "SMIT97".

The **No number at all** choice goes along with the in-text author/year citation method.

The remaining settings here are all fine for VANCOUVER. So click the **OK** button.

---

## VANCOUVER: Authors

Now double-click **Authors** to bring up this dialog:

**VANCOUVER: Authors**

**Each name** | **Special cases** | Anthony, S. B. and E. C. W. Stanton  
Sturgeon, T. H., R. Zelazny, and  
W. J. Williams  
Parker, P. B., L. Danvers,  
R. P. Stark, H. Jordan

**Multiple names** | **et al.**

**First name(s)**  
 None  Initials  Full

**First name punctuation**  
 SB  S B  S-B  
 S.B.  S. B.

**First author**  
 Firstname Surname  
 Surname Firstname  
**Punctuation between:** [ ] [ | ]  
 Surname ALL CAPS  Firstname ALL CAPS

**Subsequent authors**  
 Firstname Surname  
 Surname Firstname  
**Punctuation between:** [ ] [ | ]  
 Surname ALL CAPS  Firstname ALL CAPS

Cancel OK

Here we address the surprisingly thorny issue of how to display the names of authors. There are four parts to this dialog. We currently see the **Each name** part. Once we have dealt with these settings we will move on to **Multiple names**, and then **Special cases** and **et al.**

As is common in the sciences, VANCOUVER cares only about the authors' initials, not their full first names. However, in its terseness VANCOUVER uses the most compact punctuation for those initials, so change the **First name punctuation** accordingly:

**First name punctuation**

SB  S B  S-B  
 S.B.  S. B.

VANCOUVER gives the surname first for both the first author and subsequent authors, and uses simply a **space** between them, so we must make these changes as well:

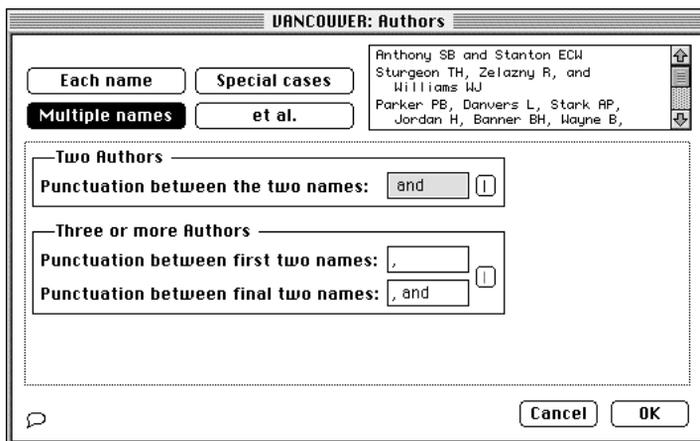
**First author**  
 Firstname Surname  
 Surname Firstname  
**Punctuation between:** [ ] [ | ]  
 Surname ALL CAPS  Firstname ALL CAPS

**Subsequent authors**  
 Firstname Surname  
 Surname Firstname  
**Punctuation between:** [ ] [ | ]  
 Surname ALL CAPS  Firstname ALL CAPS

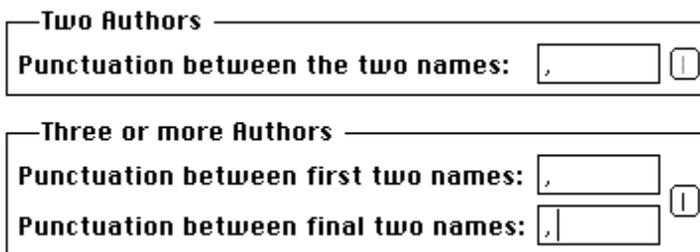
If you've followed along with me so far, the preview pane should now look like this:

```
Anthony SB and Stanton ECW
Sturgeon TH, Zelazny R, and
Williams WJ
Parker PB, Danvers L, Stark AP,
Jordan H, Banner BH, Wayne B,
```

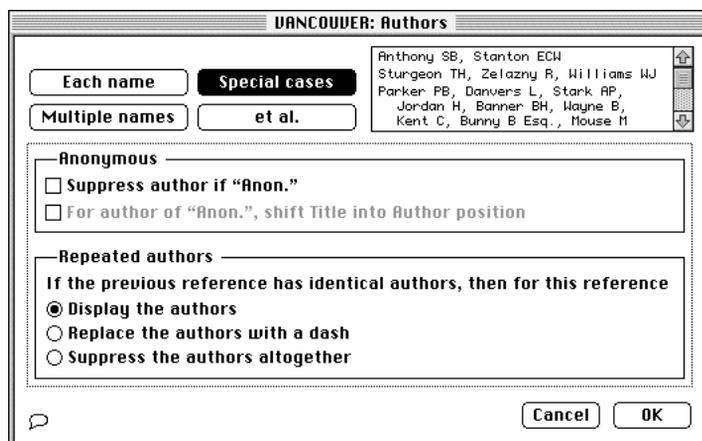
Okay, we've established the appearance of the individual author names. Now click the **Multiple names** button to move on to the next aspect of author display.



VANCOUVER uses a comma and space between each author and the next, so that's what we need to enter in each of three places available here:



Now click **Special cases**.

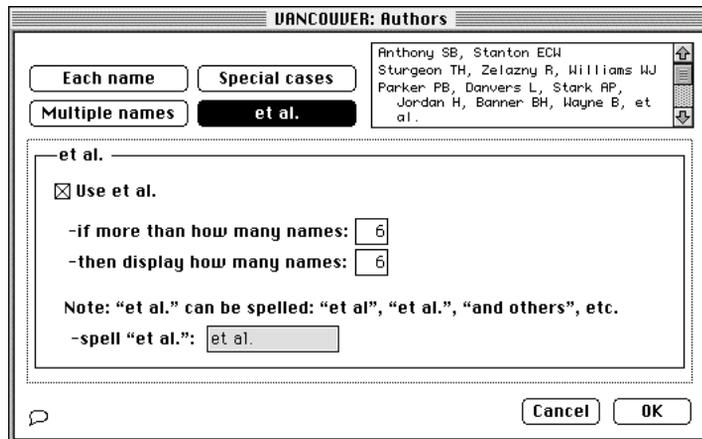


As discussed elsewhere, when an article has no author given, as with many editorials, you should enter Anon. for Author #1. This section of each output format determines whether Papyrus should display this Anon. as is, or whether it should be suppressed. In the case of VANCOUVER we do want to suppress an author of Anon., so check the Suppress author if "Anon." checkbox.

But leave unchecked the other checkbox regarding shifting the Title into the Author position.

As for **Repeated authors**, VANCOUVER like most physical science styles always displays the authors for all references, even when they repeat from one reference to the next.

Finally, click the **et al.** button. Fill in the resulting settings as follows:



---

Note that by default, Papyrus *italicizes et al.* Since VANCOUVER does not, you must select the *et al.* text and then go to the **Style** menu and choose **Plain Text**.

If you've done everything correctly, then your dialog's preview panel should appear just as the one above. Once you're satisfied that it does, click the **OK** button.

## VANCOUVER: Editors

Now double-click **Editors**. VANCOUVER specifies the same rules for editor names as for author names. So fill in the dialog as follows.

**VANCOUVER: Editors**

**Each name**

Multiple names

Anthony SB and Stanton ECW  
Sturgeon TH, Zelazny R, and  
Williams WJ  
Parker PB, Danvers L, Stark AP,  
Jordan H, Banner BH, Wayne B,

**First name(s)**

None  Initials  Full

**First name punctuation**

SB  S B  S-B  
 S.B.  S. B.

**First editor**

Firstname Surname  
 Surname Firstname

Punctuation between:

Surname ALL CAPS  Firstname ALL CAPS

**Subsequent editors**

Firstname Surname  
 Surname Firstname

Punctuation between:

Surname ALL CAPS  Firstname ALL CAPS

**VANCOUVER: Editors**

Anthony SB, Stanton ECH  
 Sturgeon TH, Zelazny R, Williams WJ  
 Parker PB, Danvers L, Stark AP,  
 Jordan H, Banner BH, Wayne B,  
 Kent C, Bunny B Esq., Mouse M

**Two Editors**  
 Punctuation between the two names: , [ ]

**Three or more Editors**  
 Punctuation between first two names: , [ ]  
 Punctuation between final two names: , [ ]

**VANCOUVER: Editors**

Anthony SB, Stanton ECH  
 Sturgeon TH, Zelazny R, Williams WJ  
 Parker PB, Danvers L, Stark AP,  
 Jordan H, Banner BH, Wayne B, et  
 al.

et al.

Use et al.

-if more than how many names: 6  
 -then display how many names: 6

Note: "et al." can be spelled: "et al", "et al.", "and others", etc.

-spell "et al.": et al.

Actually, as with most bibliographic styles VANCOUVER does not address what you're supposed to do when there are an excessive number of editors. But I suspect that the VANCOUVER creators would apply their Author *et al.* rules in such cases.

Once you've finished setting up the Editor section, click the **OK** button.

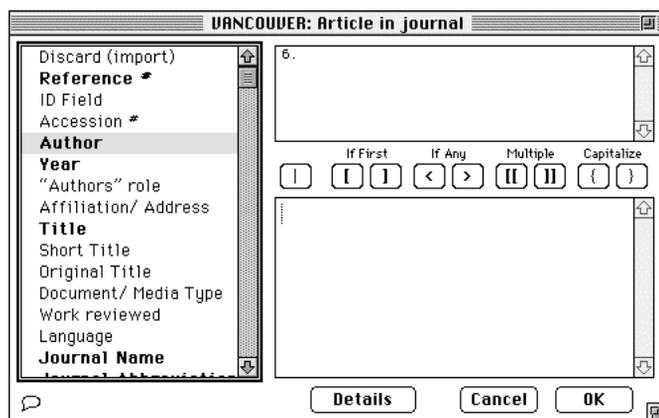
---

## VANCOUVER: Article in journal

We have now finished with the four general sections of the VANCOUVER format. Next we need to create the **templates** for each reference type.

I will go into great detail about the Article template, and make a couple of points about the Book template. The remaining templates will then be easy for you to understand on your own.

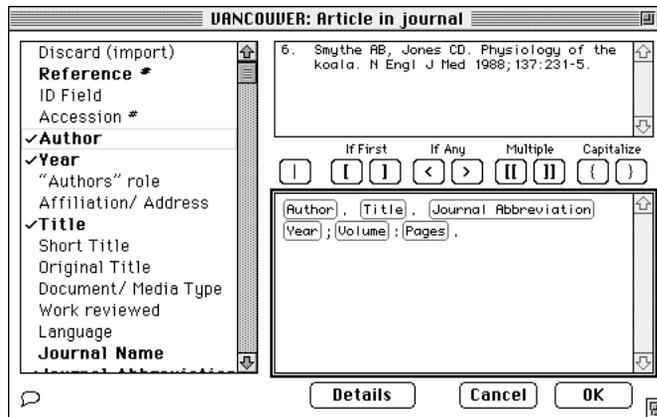
In the New Format window, double-click **Article in journal** (or select it with your arrow keys and press Return). Here is the dialog that will result:



On the left is a list of all the fields that might arise for an Article. Many of these are seldom used, obscure fields. In setting up our template we won't concern ourselves with most of these, focusing for now just on the fields typically present when citing biomedical journal articles.

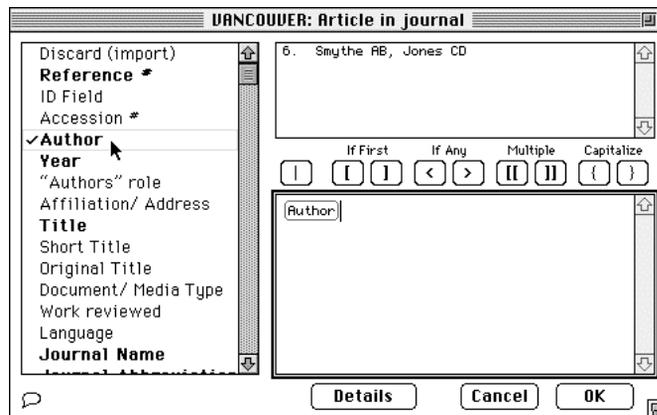
The top right pane shows a **preview** of the template. Note that even though we have not yet begun to create our Article template, the preview already shows a **Sequence #** as previously specified in the Numbering & Layout section.

Our template will take form in the lower right pane. Here is what we're about to create:

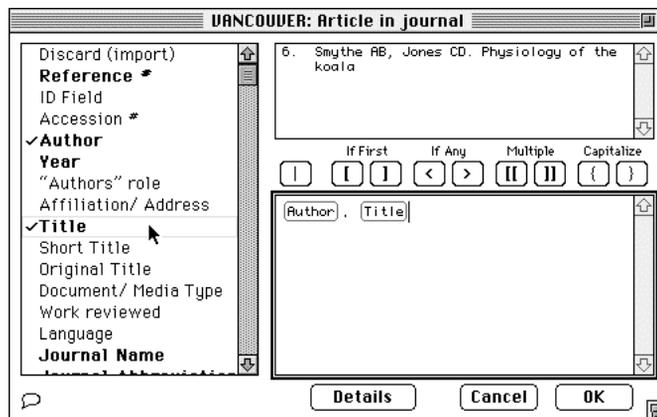


As you can see, our template “spells out” the appearance of a typical Article. We get the various fields from the field list, where they receive checkmarks as we use them. The intervening punctuation we simply type directly into the template.

So, to begin creating this template, double-click **Author** in the field list:



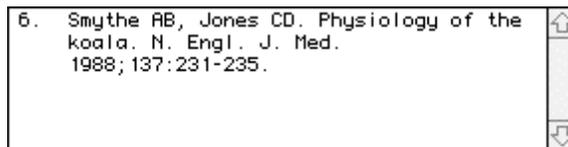
Next type a period and a space. Then double-click **Title**.



Proceed in this fashion to create the entire template shown above.

If you'd rather not keep reaching for your mouse, you can use your **Tab** key to move between the field list and the template. To select a field in the list you can use your **arrow keys**, or you can **type the first few letters** of the field name. Once you have selected a field, press **Return** to insert it into your template.

You'll note that even though your template now matches the one shown above, the preview appears a bit different:



We need to establish a few more details here. So press—did you guess?—the **Details** button.

**VANCOUVER: Article in journal**

6. Smythe AB, Jones CD. Physiology of the koala. N. Engl. J. Med. 1988; 137:231-235.

**Journal Abbreviation**  With periods  Without periods  
 Abbreviation style

**Year**  Full  2 digits  2 digits with apostrophe  
 Suppress if non-numeric

**Pages**  Full ("132-137", "200-203", "411-412", "1395-1398")  
 Simple ("132-7", "200-3", "411-2", "1395-8")  
 Chicago ("132-37", "200-203", "411-12", "1395-98")  
 MLA ("132-37", "200-03", "411-12", "1395-98")  
 Oxford ("132-7", "200-3", "411-12", "1395-8")

Many fields have details that can be adjusted. Of the fields we've used so far in our template, Journal Abbreviation, Year, and Pages each offers a few options.

For Journal Abbreviation, the VANCOUVER format expects no periods. So click the Without periods button.

The **Abbreviation style** option applies when your Papyrus database allows more than one system of journal abbreviations. For example, the biomedical world uses one set of abbreviations for journals, while the chemistry world has its own list. More about this elsewhere.

Like most formats, VANCOUVER displays the Year in Full. The Suppress if non-numeric question mainly applies to works whose Year field is In press or the like. Some bibliography styles do not want to see such a phrase in the usual Year position, so you can tell Papyrus to "suppress" them. But VANCOUVER does expect In press to appear in the usual position, so don't check this box.

Page numbers can be abbreviated in a ridiculous variety of ways, but Papyrus can deal with all the popular methods we've so far encountered. VANCOUVER uses the Simple style, so click that button.

Your preview should now be identical to the one I showed you above. So we're done, right?

Well, not quite. The template we have now entered will work correctly for 95% of Articles. But we need to make it a bit more sophisticated to handle the remaining 5%.

Click the **Template** button to return to the previous template view.

Although VANCOUVER does not usually want you to include an **issue number** for Articles, there are some journals for which one must always do so. (See the *Journals* chapter in CONCEPTS for a discussion of this.) So we need to provide for this possibility in our template:

---

6. Smythe AB, Jones CD. Physiology of the koala. N Engl J Med 1988;137(4):231-5.

Author . Title . Journal Abbreviation  
Year ; Volume ( Issue ) : Pages .

Switching back to the **Details** view there is now a new option available to us:

<input type="checkbox"/> Suppress if nonnumeric
<b>Issue</b> <input type="checkbox"/> Display for ALL journals
Pages <input type="radio"/> Full ("137-137" "200-203" "411-412" "1395-1398")

By leaving this box *unchecked*, we tell Papyrus that only *certain* journals need to have their issue number displayed.

In your database's collection of journals, each entry indicates whether citations to that journal must always include the Issue. The same applies for **Day & Month** and for **Series**. VANCOUVER is typical of scientific bibliographic styles in not requiring these items if the Pages by themselves are sufficient to find the correct issue of the journal.

This is all well and good, but what about the majority of Articles for which no Issue was entered? According to our template above, Papyrus will end up displaying such references as:

6. Smythe AB, Jones CD. Physiology of the koala. N Engl J Med 1988;137<>:231-5.

Horrors! Those empty parentheses will never do. So Papyrus provides a way to deal with such situations—the If First buttons:

	If First	If Any	Multiple	Capitalize
	[ ]	< >	[ ]	{ }
Author . Title . Journal Abbreviation	Year ; Volume [ ( Issue ) ] : Pages .			

Those If First **brackets** will not actually appear in your bibliography. Rather, they surround fields and punctuation that may or may not appear for any particular reference. In this case, if a reference does have an Issue it will show up, with parentheses around it. But if there is no Issue, then there will be no parentheses either.

Perhaps you're wondering why these brackets are called **If First** rather than, say, **If Present**.

In certain circumstances you might include more than one field within a single set of brackets. If for a particular reference the **first** field is absent, then Papyrus will not display the subsequent field(s) either.

---

This sort of thing comes up mostly with **import** formats rather than output formats, so please don't worry about it now.

We can use this same trick to accommodate **Supplements** (such as the Part 2 in 137(4 Part 2)):

```
Author . Title . Journal Abbreviation  
Year ; Volume [ ( Issue [ Supplement ] )  
] : Pages .
```

In this case I have **nested** one set of brackets within another. If there is no Issue, then we won't even consider displaying the Supplement. But if there *is* an Issue, then we'll follow it with a space character only when a Supplement is also present. Actually, though, this is not really the best way to handle Supplements—I'll return to this topic in a moment.

Another reason to use If First brackets is to handle Articles that are still **in press**. In such cases we will not have Volume, Issue, nor Pages to display. To prevent a lot of extraneous punctuation showing up, we can make these modifications:

```
Author . Title . Journal Abbreviation  
Year [ ; Volume ] [ ( Issue [  
Supplement ] ) ] [ : Pages ] .
```

So an Article still in press would yield:

```
6. Smythe AB, Jones CD. Physiology of the  
koala. N Engl J Med In press.
```

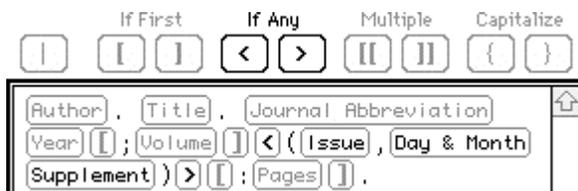
Actually, the official VANCOUVER rules would prefer to see a period between **New Engl J Med** and **In press**. Most editors, though, will accept this slight transgression without returning your manuscript for correction.

Let's now add another layer of complication. We've taken care of Articles in which the Issue must be displayed, but what about those for which Day & Month is required? And what about those that require *both*, perhaps with a Supplement thrown in for good measure? We *could* simply enter this:

```
Author . Title . Journal Abbreviation  
Year [ ; Volume ] [ ( Issue , Day & Month  
[ Supplement ] ) ] [ : Pages ] .
```

But now any time there's an Issue it will be followed by a comma, regardless of whether there is a Day & Month or not. And if there is *no* Issue, but there *is* a Day & Month, we will not see *either* of them—Papyrus only looks at the *first* field appearing within If First brackets in deciding whether the entire bracketed contents will be displayed.

Yuck! We've reached the limit of what we can do with If First brackets. So it's time to introduce a new trick—If Any brackets:



These new brackets work much like If First brackets, but they are smarter. In the above example, the parentheses will show up only if *either* the Issue *or* the Day & Month *or* a Supplement—or any combination of these—appears. In addition, the intervening punctuation will appear only if both preceding and following fields are displayed. So this:

< ( Issue , Day & Month Supplement ) >

could yield any of the following, depending on which fields are present for a particular reference:

<4>                      <Apr>                      <Part 2>  
 <4, Apr>                      <Apr Part 2>  
 <4 Part 2>  
 <4, Apr Part 2>

Although If Any brackets are smarter and sometimes cleaner than If First brackets, they involve much more thought for Papyrus. They can therefore slow output down a little bit. Also, unlike If First brackets, If Any brackets cannot be nested. For these reasons, **you should use If First brackets whenever possible, and reserve If Any brackets for situations such as the above.**

Now that I've made all these educational points, I need to correct something. VANCOUVER *actually* puts the Day & Month, when present, after the Year, not the Issue. So let us rearrange things accordingly:

Author, Title, Journal Abbreviation  
 Year  
 Day & Month; Volume < ( Issue  
 Supplement ) > : Pages .

Here's yet another concern with which we must cope. You will run into some journals that over time have fissioned into a bunch of separate **journal series**. For example, the *American Journal of Physiology* includes one series on integrative physiology, another on endocrinology, etc. In VANCOUVER format it is customary (as far as I have been able to figure out!) to include such Journal Series information with the Issue:

---

```

Author , Title . Journal Abbreviation
Year
Day & Month ; Volume < (
Journal Series Issue
Supplement ) > : Pages .

```

And now, one final refinement. In case a reference contains information in its **Also Print** field, let's include that at the very end:

```

Author , Title . Journal Abbreviation
Year
Day & Month ; Volume < (
Journal Series Issue
Supplement ) > : Pages (
Also Print ) .

```

That takes care of the VANCOUVER template for Articles. Really.

## VANCOUVER: Book/Monograph

Now I'll show you how VANCOUVER's **Book/Monograph** template should appear:

```

Author [ , "Authors" role ] . Book Title . [ Edition
ed. ] [ v. Volume . ] Publishers & Cities ; Year [ .
p. Specific pages ] [ . Additional information ] <
( [ Series Editor , Role of Series "Editor" ] .
Series Title ; Place in Series ) > [ (Also Print) ] .

```

6. Smythe AB, Jones CD, editors. Life among the aborigines. 2nd ed. v. 4. Boston: Harvard Univ. Press, Cambridge: Cambridge Univ. Press; 1988. p. Specific pages. Report No. 32 (Armstrong M, editor. Exotic Vacation Locales; Part 3) (Previously published in New Zealand).

Of course, the **Details** are also important:

<b>"Authors" role</b>	<b>Spell "editor/editors":</b> <input type="text" value="editor/editors"/> <b>Spell "compiler/compilers":</b> <input type="text" value="compiler/compilers"/> <b>Spell "translator/translators":</b> <input type="text" value="translator/translators"/> <b>Spell "commentator/commentators":</b> <input type="text" value="commentator/commentators"/>
<b>Edition</b>	<input checked="" type="radio"/> <b>Keep suffix</b> ("2nd") <input type="radio"/> <b>Drop suffix</b> ("2")
<b>Publishers &amp; Cities</b>	<input type="radio"/> <b>Publisher first</b> <input checked="" type="radio"/> <b>City first</b> <b>Punctuation between publisher and city:</b> <input type="text" value=" : "/> <b>Punctuation between multiple publishers:</b> <input type="text" value=" , "/> 
<b>Year</b>	<input checked="" type="radio"/> <b>Full</b> <input type="radio"/> <b>2 digits</b> <input type="radio"/> <b>2 digits with apostrophe</b> <input type="checkbox"/> <b>Suppress if non-numeric</b>
<b>Specific pages</b>	<input type="radio"/> <b>Full</b> ("132-137", "200-203", "411-412", "1395-1398") <input checked="" type="radio"/> <b>Simple</b> ("132-7", "200-3", "411-2", "1395-8") <input type="radio"/> <b>Chicago</b> ("132-37", "200-203", "411-12", "1395-98") <input type="radio"/> <b>MLA</b> ("132-37", "200-03", "411-12", "1395-98") <input type="radio"/> <b>Oxford</b> ("132-7", "200-3", "411-12", "1395-8") <input type="checkbox"/> <b>Spell "p./pp.":</b> <input type="text" value=" p./pp."/> 
<b>Role of Series "Editor"</b>	<b>Spell "editor/editors":</b> <input type="text" value="editor/editors"/> <b>Spell "compiler/compilers":</b> <input type="text" value="compiler/compilers"/> <b>Spell "translator/translators":</b> <input type="text" value="translator/translators"/> <b>Spell "commentator/commentators":</b> <input type="text" value="commentator/commentators"/>

Most of this should make sense to you now, so I will just make a few points here.

The **"Author" role** field will only contain information when the "authors" of a book are really editors (or, occasionally, compilers, translators or commentators). You will always want to put If First brackets around this field, so that the associated punctuation will not be displayed when the "authors" really *are* authors.

The **Spell "editor/editors" etc.** settings allow you to indicate that a given format should display these as *ed./eds.* or whatever rather than using the full words.

Note that although you *can* use the separate fields **Publisher** and **City of Publication**, Papyrus offers a combined "field" for templates, **Publishers & Cities**. This is because sometimes a book will have more than one set of publishers and cities—it may have been published simultaneously in the U.S. and the U.K. by two different publishers, for example. In the associated Details, in addition to indicating whether Publisher comes before or after City, and what punctuation comes between them, you specify the **Punctuation between multiple publishers** to

---

handle cases of multiple publication. The sample reference here includes two publishers and cities.

You'll recall that **Specific pages** might sometimes appear in a Book/Monograph reference. Actually, I think that most biomedical publishers expect you to cite the specific page numbers in your in-text citations. But just to be safe I've included provision for specific pages here in the Book/Monograph template.

That's all I will say about the VANCOUVER format. The complete format is available in the BioMed Format Library; see the *Formats, Format Libraries and Predefined Formats* chapter for a reminder of how to copy our predefined format into your own database, where you can then study it at your leisure.

## CHICAGO A

The CHICAGO A format is one of two presented in the *Chicago Manual of Style*. This book defines the rules used by many academic publishers, in many disciplines. The 14th edition of the *Chicago Manual* refers to CHICAGO A as the "documentary-note" or "humanities" style.

In CHICAGO A our sample Article would appear as follows:

Smythe, Albert B., and Christine D. Jones. "Physiology of the Koala." *New England Journal of Medicine* 137 (1978): 231-35.

Since you have just worked through the VANCOUVER format in some detail, I will show you how to set up CHICAGO A with a minimum of discussion, except where I am introducing a new concept.

Begin by opening the **Formats window** and clicking the **New...** button. Then fill in the name and description:

The screenshot shows a dialog box titled "Edit Format". It contains the following fields and options:

- Format Name:** CHICAGO A
- Description:** Chicago Manual, long form
- Format Type:** Output (selected), Tabular output, Import
- Default Import Publishers Level:** Finicky, Tolerant (selected), Oblivious
- Plugin filters:** (empty field)
- Sorting & Citing, Numbering & Layout:** (vertical menu with scroll bar)
- Buttons:** Cancel, Done

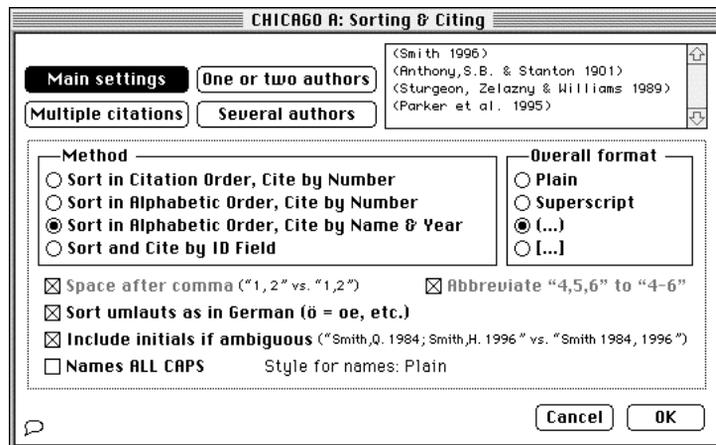
---

## CHICAGO A: Sorting & Citing

The **Sorting & Citing** section of this format is more interesting than VANCOUVER's. Rather than numbering the references in the bibliography and then citing them by number within a manuscript, CHICAGO A lists the references in alphabetical order, and cites them in the text using the (Author, Year) method.

Actually, I'm cheating a bit here, for pedagogic purposes. In the *Chicago Manual's* documentary-note system there *are* no in-text citations to the bibliography. Rather, superscripted numbers in the text take the reader to either footnotes or endnotes, which include both additional text and complete bibliographic entries. The final bibliography is simply a stand-alone list of references, in alphabetic order.

But for the sake of learning, let's just pretend that CHICAGO A uses in-text citations of the Author-Year style. Okay?



**CHICAGO A: Sorting & Citing**

(Williams 1989; Smith 1996)
   
 (Anthony 1887, 1894)

**Two citations with DIFFERENT Authors**  
 Punctuation between the two citations: ;

**Two citations with SAME Authors**  
 Punctuation before the second year: ,

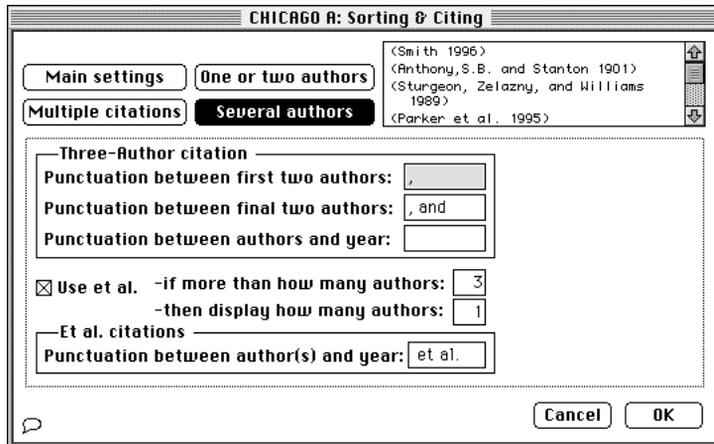
**Sort citations**  
 **Alphabetically** (Jones 1985, Smith 1974)  
 **Chronologically** (Smith 1974, Jones 1985)  
 **However you've ordered them**

**CHICAGO A: Sorting & Citing**

(Smith 1996)
   
 (Anthony, S.B. and Stanton 1901)
   
 (Sturgeon, Zelazny & Williams 1989)
   
 (Parker et al. 1995)

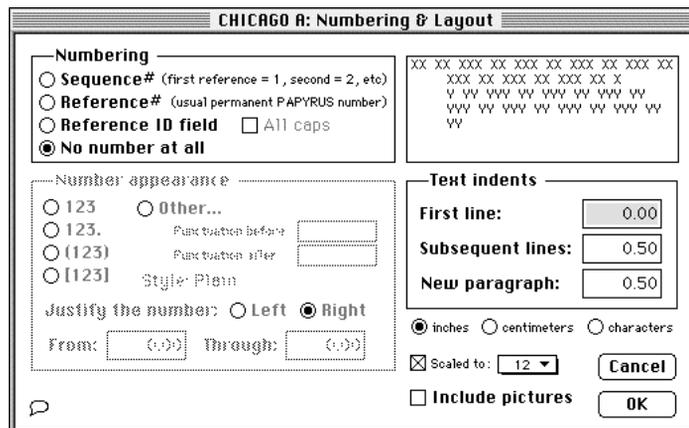
**One-Author citation**  
 Punctuation between author and year:

**Two-Author citation**  
 Punctuation between the two authors: and  
 Punctuation between authors and year:



## CHICAGO A: Numbering & Layout

The **Numbering & Layout** section of CHICAGO A is straightforward:



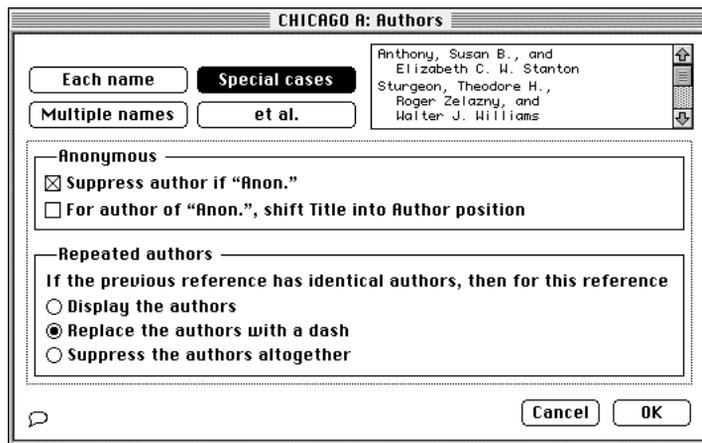
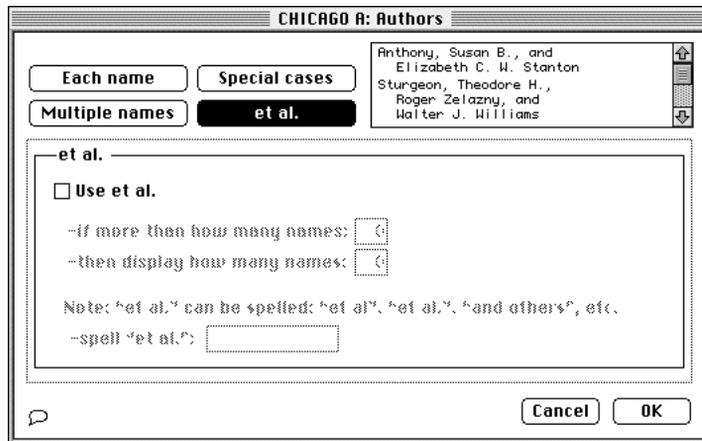
---

## CHICAGO A: Authors

The **Authors** section of CHICAGO A is mostly self-explanatory:

The screenshot shows the 'CHICAGO A: Authors' dialog box. At the top, the title bar reads 'CHICAGO A: Authors'. Below the title bar, there are two buttons: 'Each name' (which is highlighted in black) and 'Special cases'. Below these are two more buttons: 'Multiple names' (highlighted in black) and 'et al.'. To the right of these buttons is a text area containing the author list: 'Anthony, Susan B., and Elizabeth C. W. Stanton; Sturgeon, Theodore H., Roger Zelazny, and Walter J. Williams'. Below the buttons and text area are two main sections. The first section is 'First name(s)' with radio buttons for 'None', 'Initials', and 'Full' (which is selected). The second section is 'First name punctuation' with radio buttons for 'SB', 'S B', 'S.B.', and 'S. B.' (which is selected). Below these are two sections for 'First author' and 'Subsequent authors'. The 'First author' section has radio buttons for 'Firstname Surname' and 'Surname Firstname' (which is selected). The 'Subsequent authors' section has radio buttons for 'Firstname Surname' (which is selected) and 'Surname Firstname'. Each of these sections has a 'Punctuation between:' field with a dropdown arrow. At the bottom, there are checkboxes for 'Surname ALL CAPS' and 'Firstname ALL CAPS'. At the very bottom of the dialog are 'Cancel' and 'OK' buttons.

The screenshot shows the 'CHICAGO A: Authors' dialog box. At the top, the title bar reads 'CHICAGO A: Authors'. Below the title bar, there are two buttons: 'Each name' and 'Special cases'. Below these are two more buttons: 'Multiple names' (highlighted in black) and 'et al.'. To the right of these buttons is a text area containing the author list: 'Anthony, Susan B., and Elizabeth C. W. Stanton; Sturgeon, Theodore H., Roger Zelazny, and Walter J. Williams'. Below the buttons and text area is a section titled 'Two Authors' with a 'Punctuation between the two names:' field containing a dropdown arrow and the text ', and'. Below this is a section titled 'Three or more Authors' with two fields: 'Punctuation between first two names:' and 'Punctuation between final two names:', each with a dropdown arrow and the text ', and'. At the bottom of the dialog are 'Cancel' and 'OK' buttons.



According to the rules of CHICAGO A, if an author for a particular article has been entered as Anon., then there will be no author listed in the displayed reference, not even Anon. So here we tell Papyrus to **suppress** such authors. (I will come back to this when we get to the Article template in a moment.) There are some formats, such as APA, that would in such cases have us move the reference's Title to where the authors would normally appear, but CHICAGO A is not one of these.

Note the section about **repeated authors**. With CHICAGO A, one does not repeat the authors if they are identical to those of the previous reference:

---

Smythe, Albert B., and Christine D. Jones. "Physiology of the Koala." *New England Journal of Medicine* 137 (1978): 231-35.

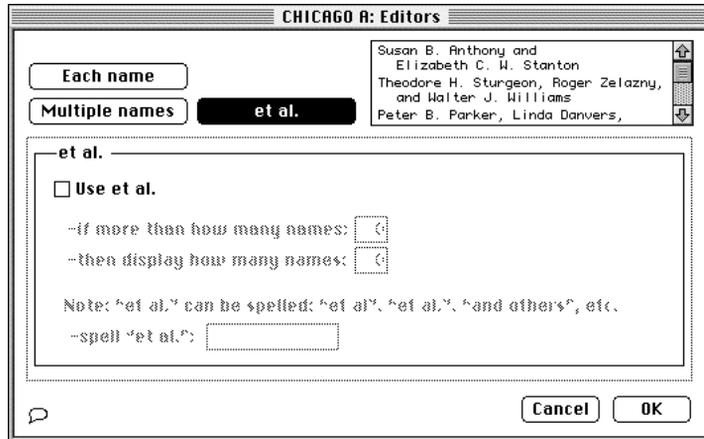
----- "Eucalyptus Euphoria." *Journal of Lethargic Pharmacokinetics*. 35 (1982): 23-9.

## CHICAGO A: Editors

The **Editors** section is unremarkable:

The screenshot shows the 'CHICAGO A: Editors' dialog box with the 'Each name' tab selected. The 'Multiple names' button is also selected, and the 'et al.' text box is active. The list of names is: Susan B. Anthony and Elizabeth C. W. Stanton, Theodore H. Sturgeon, Roger Zelazny, and Walter J. Williams, Peter B. Parker, Linda Danvers. The 'First name(s)' section has 'Full' selected. The 'First name punctuation' section has 'S. B.' selected. The 'First editor' section has 'Firstname Surname' selected. The 'Subsequent editors' section has 'Firstname Surname' selected. There are 'Punctuation between:' text boxes for both sections. At the bottom, there are 'Surname ALL CAPS' and 'Firstname ALL CAPS' checkboxes for both sections, and 'Cancel' and 'OK' buttons.

The screenshot shows the 'CHICAGO A: Editors' dialog box with the 'Multiple names' tab selected. The 'et al.' text box is active. The list of names is: Susan B. Anthony and Elizabeth C. W. Stanton, Theodore H. Sturgeon, Roger Zelazny, and Walter J. Williams, Peter B. Parker, Linda Danvers. The 'Two Editors' section has 'and' selected in the 'Punctuation between the two names:' text box. The 'Three or more Editors' section has ',' selected in the 'Punctuation between first two names:' text box and ', and' selected in the 'Punctuation between final two names:' text box. At the bottom, there are 'Cancel' and 'OK' buttons.



---

## CHICAGO A: Article in journal

Now here is what the **Article** template of CHICAGO A looks like:

[ Author ] " [ Title ] , " *Journal Name*  
[ , *Journal Series* ] [ Volume ] < , no.  
Issue , Supplement > ( [ Day & Month ]  
Year ) [ : Pages ] . [ Also Print ]

Smythe, Albert B., and Christine D. Jones.  
"Physiology of the Koala." *New England  
Journal of Medicine, Series B* 137, no. 4,  
Suppl. A (12 April 1988): 231-35.  
Previously published in New Zealand.

Journal Series	<input type="checkbox"/> Display for ALL journals
Issue	<input type="checkbox"/> Display for ALL journals
Day & Month	<input checked="" type="radio"/> Day first ("12 Apr") <input type="radio"/> Month first ("Apr 12") <input type="radio"/> Short months ("Apr") <input checked="" type="radio"/> Long months ("April") <input type="checkbox"/> Display for ALL journals
Year	<input checked="" type="radio"/> Full <input type="radio"/> 2 digits <input type="radio"/> 2 digits with apostrophe <input type="checkbox"/> Suppress if non-numeric
Pages	<input type="radio"/> Full ("132-137", "200-203", "411-412", "1395-1398") <input type="radio"/> Simple ("132-7", "200-3", "411-2", "1395-8") <input checked="" type="radio"/> Chicago ("132-37", "200-203", "411-12", "1395-98") <input type="radio"/> MLA ("132-37", "200-03", "411-12", "1395-98") <input type="radio"/> Oxford ("132-7", "200-3", "411-12", "1395-8") <input type="checkbox"/> Spell "p./pp.": [p./pp.]

There are several things to note here.

We have told Papyrus that if a reference's author is Anon. it should not display the author. Since in such cases there will be nothing appearing at the beginning of the article display, we need to also suppress the period and space that are supposed to follow the authors. Hence the initial If First brackets around the author part.

According to CHICAGO A, the **Journal Name** is supposed to be *italicized*. We accomplish this quite easily, by selecting the `Journal Name` field in our template, and then choosing *Italic* from the **Style** menu.

The CHICAGO A format specifies that all significant words appearing in titles should be **capitalized**. Hence the Capitalize brackets, `{f}` and `{i}`, surrounding the **Title** field.

---

If you knew that all article titles in your Papyrus database were consistently entered with all words capitalized, then you would not need to use the Capitalize brackets here in the Article template. But if you sometimes use CHICAGO A yet other times use format styles that do *not* want all words capitalized—such as almost all formats in the physical sciences—then you can *enter* titles with only their first word capitalized and let the *format* take care of capitalizing when Papyrus *outputs* your reference lists.

As with VANCOUVER I have included lots of **If First brackets** to cover references in press, references with or without Issues, with or without Supplements, and with or without Day & Month. The **If Any brackets** serve the same function here that they did in the VANCOUVER format.

## CHICAGO A: Chapter in book

Here is the Chapter in book template of CHICAGO A:

[ Author . ] " { Chapter Title } . " [ Chap. Chapter # ] In *Book Title* [ . Edition ed. ] [ , Role of "Editor" by Editor ] [ , Pages ] . [ { Series Title } ] [ , Role of Series "Editor" by Series Editor ] [ , Place in Series ] . [ Vol. Volume . ] [ Additional info . ] Publishers & Cities , Year . [ Also Print . ]

Smythe, Arthur B., and Charlene D. Jones. "Kangaroos I Have Known." Chap. 3 In *Marsupial Life*. 4th ed., edited & translated by Robert D. Zimmerman; edited by Lyndon B. Johnson, 101-23. Encyclopedia of Weird Animals, edited by D. Doolittle, Part 2. Vol. 2. Report No. 47. New Haven: Yale University Press; Cambridge: Cambridge University Press, 1988. Previously published in New Zealand.

<b>Edition</b>	<input checked="" type="radio"/> Keep suffix ("2nd") <input type="radio"/> Drop suffix ("2")
<b>Role of "Editor"</b>	<b>Spell "editor/editors":</b> <input type="text" value="edited/edited"/> <b>Spell "compiler/compiler's":</b> <input type="text" value="compiled/compiled"/> <b>Spell "translator/translator's":</b> <input type="text" value="translated/translated"/> <b>Spell "commentator/commentator's":</b> <input type="text" value="commented on/commented on"/>
<b>Pages</b>	<input type="radio"/> Full ("132-137", "200-203", "411-412", "1395-1398") <input type="radio"/> Simple ("132-7", "200-3", "411-2", "1395-8") <input checked="" type="radio"/> Chicago ("132-37", "200-203", "411-12", "1395-98") <input type="radio"/> MLA ("132-37", "200-03", "411-12", "1395-98") <input type="radio"/> Oxford ("132-7", "200-3", "411-12", "1395-8") <input type="checkbox"/> Spell "p./pp.": <input type="text" value="p./pp."/>
<b>Role of Series "Editor"</b>	<b>Spell "editor/editors":</b> <input type="text" value="edited/edited"/> <b>Spell "compiler/compiler's":</b> <input type="text" value="compiled/compiled"/> <b>Spell "translator/translator's":</b> <input type="text" value="translated/translated"/> <b>Spell "commentator/commentator's":</b> <input type="text" value="commented on/commented on"/>
<b>Publishers &amp; Cities</b>	<input type="radio"/> Publisher first <input checked="" type="radio"/> City first Punctuation between publisher and city: <input style="width: 20px;" type="text" value=" : "/> Punctuation between multiple publishers: <input style="width: 20px;" type="text" value=" ; "/>
<b>Year</b>	<input checked="" type="radio"/> Full <input type="radio"/> 2 digits <input type="radio"/> 2 digits with apostrophe <input type="checkbox"/> Suppress if non-numeric

---

There is a lot going on here, but nothing you shouldn't be able to figure out. Do take the time, though, to make sure that you understand how all this fits together.

To examine the remaining sections of CHICAGO A, copy the complete format to your database from the Humanities Format Library.

## AM ANTIQ

*American Antiquity* is an important journal in anthropology, and its bibliographic style is used in many other contexts. (It is also one of the few journals whose Instructions to Authors devotes a full half-dozen pages to bibliographic style, leaving us with much less guesswork than usual!) Here is our familiar sample reference, plus two other skeletons of references, in AM ANTIQ style:

```
Smythe, Albert B., and Christine D. Jones
  1988 Physiology of the Koala. New England Journal of Medicine,
    Series B 137(4 Suppl. A) April 12:231-235, Previously published
    in New Zealand.
Thompson, Esther F.
  1982 XXXXXX YYY ZZZZZZ XXXXXX YYYYYYYY ZZZZZ XXXXX
    YYYYYYYYYY XXXXXX ZZZ XXXXXXXXXXXX YYYY ZZZZ XXXXX.
  1992 XXXXXXXXXXXX YYYY ZZZZ XXXXXXXXXXXX YY ZZZZZZZ XXX
    YYYYYYYYYYYY ZZZZ XXXXXXXXXXXX YYY ZZZZZ XXX YYYYYYY
    XXXX YYYYYY ZZZ XXXXXXXXXXXX YYYY ZZZZZ.
```

The most interesting new wrinkle here is the **indentation**. For the first reference by a particular author or group of authors, the Authors appear on their own line, beginning at the left margin. The next line starts with the Year, indented a bit. Any additional lines of text wrap around to begin fresh lines that are indented a bit more.

Papyrus can be taught to handle this indentation style correctly. The secret lies in the concept of **paragraphs**.

We usually consider each reference to be a single paragraph—if sometimes a rather pathologically-shaped sort of one, as in the above examples. However, we can tell Papyrus to break references into more than one “paragraph,” and to indent the second and subsequent paragraphs differently than the first.

So for AM ANTIQ we will consider the Authors line one paragraph, and the rest of each reference (starting with the Year) a second paragraph. The **first line of the first paragraph** has no indentation, the **first line of subsequent paragraphs** is indented, and **continuation lines of any paragraph** are indented further yet.

Finally, we will tell Papyrus to **suppress the Author** paragraph altogether if a reference's authors are identical to those of the preceding reference.

---

## AM ANTIQ: Numbering & Layout

I will not take the time now to review the **Sorting & Citing** section of AM ANTIQ, as it is quite similar to that of CHICAGO A. Instead let's proceed directly to **Numbering & Layout**:

The screenshot shows the "AM ANTIQ: Numbering & Layout" dialog box. It is divided into several sections:

- Numbering:** Contains radio buttons for "Sequence# (first reference = 1, second = 2, etc)", "Reference# (usual permanent PAPHYRUS number)", "Reference ID field" (with an "All caps" checkbox), and "No number at all" (which is selected).
- Number appearance:** Contains radio buttons for "123", "123." (with "Punctuation before" and "Punctuation after" fields), "(123)", and "[123]" (with a "Style Plain" checkbox). Below this are "Justify the number:" options for "Left" and "Right" (with "Right" selected), and "From:" and "Through:" fields with "()" symbols.
- Text indents:** Contains input fields for "First line:" (0.00), "Subsequent lines:" (0.50), and "New paragraph:" (0.25). Below these are radio buttons for "inches" (selected), "centimeters", and "characters". There is also a "Scaled to:" dropdown menu set to "12", and a "Cancel" button.
- Include pictures:** A checkbox that is currently unchecked, with an "OK" button next to it.

A preview window in the top right shows a sample of text with various indents and a small picture of a papyrus plant.

As promised, we have told Papyrus to indent a **New paragraph** somewhat, and to indent further the **Subsequent lines** of all paragraphs (*i.e.*, all lines after the first line of a paragraph).

## AM ANTIQ: Authors

Here is the interesting part of the **Authors** section:

The screenshot shows the "AM ANTIQ: Authors" dialog box. It features a list of author names in a scrollable area: "Anthony, Susan B., and Elizabeth C. W. Stanton", "Sturgeon, Theodore H.", "Roger Zelazny, and Walter J. Williams".

Buttons for "Each name", "Special cases" (which is highlighted), "Multiple names", and "et al." are visible.

The "Anonymous" section contains two checked checkboxes: "Suppress author if 'Anon.'" and "For author of 'Anon.', shift Title into Author position".

The "Repeated authors" section contains three radio buttons: "Display the authors", "Replace the authors with a dash", and "Suppress the authors altogether" (which is selected).

At the bottom right, there are "Cancel" and "OK" buttons.

The **Repeated authors** section is where we tell Papyrus to suppress the Authors field when it is identical to that of the previous reference. This will have some implications for how we set up the Article template, as you'll see in a moment.

Note that for references with an Author of Anon. we are telling Papyrus to shift the Title into the Author position. Here is an example from the *American Antiquity* guidelines:

The Puritans  
1978 *Time*. October 9:64-65.

The Article template will also reflect this concern.

## AM ANTIQ: Article in journal

And now, here is the template for an **Article in journal**:

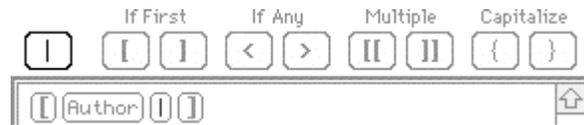
```
[ Author ] [ ]
Year [ { Title } ] [ Journal Name ] ,
[ Journal Series ] [ Volume < ( Issue
Supplement ) > ] [ Day & Month ] [ : Pages ] [ ] ,
[ Also Print ] [ ] .
```

Smythe, Albert B., and Christine D. Jones  
1988 Physiology of the Koala. *New England Journal of Medicine, Series B* 137(4 Suppl. A)  
April 12:231-235, Previously published in New Zealand.

<b>Year</b>	<input checked="" type="radio"/> Full <input type="radio"/> 2 digits <input type="radio"/> 2 digits with apostrophe <input type="checkbox"/> Suppress if non-numeric
<b>Journal Series</b>	<input type="checkbox"/> Display for ALL journals
<b>Issue</b>	<input type="checkbox"/> Display for ALL journals
<b>Day &amp; Month</b>	<input type="radio"/> Day first ("12 Apr") <input checked="" type="radio"/> Month first ("Apr 12") <input type="radio"/> Short months ("Apr") <input checked="" type="radio"/> Long months ("April") <input type="checkbox"/> Display for ALL journals
<b>Pages</b>	<input checked="" type="radio"/> Full    ("132-137", "200-203", "411-412", "1395-1398") <input type="radio"/> Simple    ("132-7", "200-3", "411-2", "1395-8") <input type="radio"/> Chicago    ("132-37", "200-203", "411-12", "1395-98") <input type="radio"/> MLA    ("132-37", "200-03", "411-12", "1395-98") <input type="radio"/> Oxford    ("132-7", "200-3", "411-12", "1395-8") <input type="checkbox"/> Spell "p./pp.": <input type="text" value="p./pp."/>

---

That **bar** character after the Author field is a Paragraph Break. You insert it into a template by clicking the  button:



This template says: “If there are authors—*i.e.*, they have not been suppressed because they were identical to those of the previous reference—then display them and then go on to a new paragraph. Begin the new paragraph with the Year, followed by the rest of the reference information.”

As you will see when you enter the above template, Papyrus displays each paragraph of your template in a different **color**, to make the paragraph breaks more apparent.

Recall that we had previously specified that for Anon. references the Title is to be shifted into the Author position. That would leave the Title position empty, so we have used If First brackets around the Title field and its following period and space.

Copy the complete AM ANTIQ format from the Humanities Format Library if you would like to review its remaining templates.

## TABLE

By now you’re familiar with Papyrus’s built-in BRIEF format:

999 Smythe; Jones 1988 Physiology of... N. Engl. ... 137:231

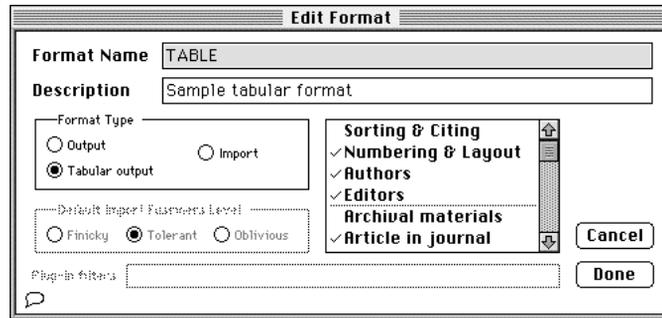
This is a **tabular** output format. Each field or groups of fields appears within a restricted column, so the overall appearance of the reference list is that of a neat table.

When a field is too long to fit into the available space, as are both the Title and Journal Abbreviation here, it is **truncated**.

You can create your own tabular output formats. You may arrange whichever fields you wish, in whatever order, on one or more lines. Here is our sample reference as displayed with the two-line TABLE format we are about to create:

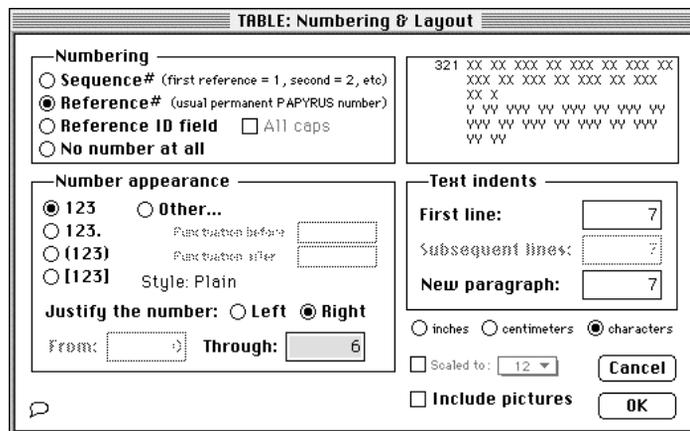
999 Smythe, Jones 1988 N Engl J Med 137(4):231  
Physiology of the koala

Begin by clicking the Format’s window **New...** button. Enter the name and description of the format as shown below, and click the Tabular output button:



## TABLE: Numbering & Layout

Since we do not expect to use this format in conjunction with any published manuscripts, we need not complete the **Sorting & Citing** part of the format. So let us look at **Numbering & Layout**:



Note that Papyrus doesn't allow us to specify the indentation of **subsequent lines** as it usually would. With a tabular output format all "paragraphs" will be exactly one line long—overly long fields will be truncated to fit.

Also note that I've set the units here to **characters** rather than the **inches** I've been using for our other formats. There's really no *need* for this change; I just find it easier to leave the correct amount of space for the Reference # if I think in terms of characters. This way there will be enough room for a 6-digit Reference #, which should cover most Papyrus databases.

---

## TABLE: Authors

The **Authors** section is straightforward. For the sake of compactness, we'll tell Papyrus to omit the authors' initials altogether:

The screenshot shows the 'TABLE: Authors' dialog box with the 'Each name' tab selected. The 'Special cases' tab is also visible. The 'First name(s)' section has 'None' selected. The 'First name punctuation' section has 'S.B.' selected. The 'First author' section has 'Surname Firstname' selected. The 'Subsequent authors' section has 'Firstname Surname' selected. The 'Punctuation between:' fields are empty. The 'Surname ALL CAPS' and 'Firstname ALL CAPS' checkboxes are unchecked. The 'Cancel' and 'OK' buttons are at the bottom right.

The screenshot shows the 'TABLE: Authors' dialog box with the 'Multiple names' tab selected. The 'Two Authors' section has a comma selected in the 'Punctuation between the two names:' field. The 'Three or more Authors' section has commas selected in both the 'Punctuation between first two names:' and 'Punctuation between final two names:' fields. The 'Cancel' and 'OK' buttons are at the bottom right.

There's no need to set up any **et al.** rules. If there are more Authors than can fit into the column we provide, Papyrus will simply truncate them.



---

Note that these widths are not measured in inches or characters or any other unit. Rather they are **relative** to the line length. When you use this format in a Group window, for example, if you enlarge the window then each column will enlarge proportionally.

Click the **OK** button to save this Article template.

## TABLE: Book/Monograph

Now let's set up a corresponding **Book/Monograph** template for TABLE:

Author || Year || Publisher |  
Book Title

999 Smythe, Jones      1988 Harvard Univ. Press; Cambri...  
Life among the aborigines

<b>Columns</b>		
	Author    Year    Publisher	
<b>Year</b>	<input checked="" type="radio"/> Full <input type="radio"/> 2 digits <input type="radio"/> 2 digits with apostrophe <input type="checkbox"/> Suppress if non-numeric	
<b>Publisher</b>	<b>Punctuation between entries:</b> <input type="text" value=";"/>	

As you can see, there is no requirement that we provide the same number of columns (or lines, for that matter) for each different reference type. But I *have* set the widths of the Author and Year columns the same as in the Article template. That way the first two columns will line up nicely in a reference list including both Articles and Books.

•      •      •

Feel free to experiment by setting up templates for some other reference types.

You might also try this: make a Group of references and then click the Group's Preferences... button. Set the Group's Table view format to TABLE, and its Lines shown per reference to 2.

---

## See Also...

In this chapter we have worked through three **output formats** of increasing complexity, plus a **tabular** output format. We have covered most of the techniques you will need to set up your own output formats.

For further details about the many features available in the various Format editing dialogs, see the *Format Entry* chapter in the REFERENCE section.

There are also some time-saving **shortcuts** you'll want to read about.

---

## See also:

### CONCEPTS

*Bibliographies vs. Footnote Lists*  
*Output Formats*  
*Journals*

### REFERENCE

*Formats Window*  
*Format Entry*  
*Sorting & Citing*  
*Numbering & Layout*  
*Authors/Editors Format*  
*Template Entry*

### SHORTCUTS

*Format Entry Dialog*  
*Template Entry Dialog*

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## Importing—Overview

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## Introduction

***Important note*** This is *not* the first chapter in this **WORKBOOK**. Importing references into Papyrus from other sources is *not* the simplest way to begin using Papyrus. If you have not yet spent at least a little time trying more basic Papyrus operations you may experience unnecessary difficulties with your first imports. This means *you!*

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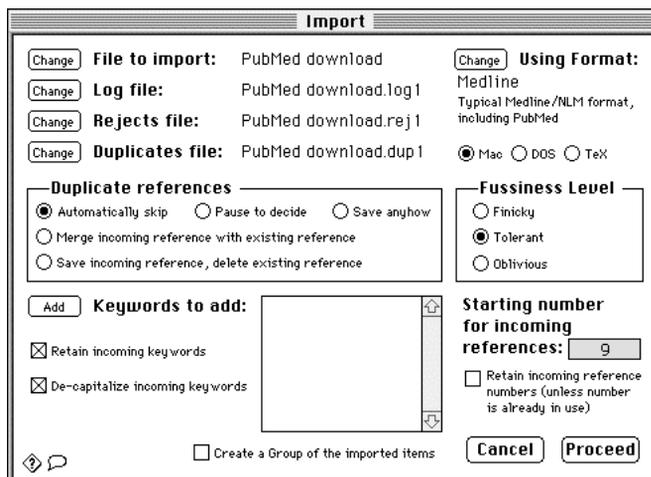
Sorry. Our technical support staff insisted that I include that.

Actually, importing references into Papyrus can be quite a smooth and easy process. It can also sometimes be a complex and potentially frustrating process. In this chapter I will present an overview of the steps needed to load references from various sources into Papyrus. In doing so I will try to help you understand why most imports will be easy, others more challenging, and an occasional few just not worth the bother.

Then in the next four chapters I will present more specific advice for particular types of imports.

• • •

When you select **Import...** from the **Reference** menu, the following dialog will appear:



In the rest of this chapter we will explore this dialog.

---

## Source file



The chief prerequisite for importing references into Papyrus is a computer file that contains a bunch of interesting references. There are many possible sources for such files:

- bibliographies you've typed for previous publications
- CD-ROM databases, such as Silver Platter
- online databases, such as Medline or Dialog
- monthly diskette update services, such as Current Contents on Diskette or Reference Update
- general-purpose database programs, such as Access or dBase
- other personal bibliographic database programs

Wherever your file comes from, it must meet a few **absolute requirements**:

- the file must be a plain text file—not the idiosyncratic native-format file of a word processor or database program
- *between* references there must be **at least one blank line**, so that Papyrus can tell where each reference begins and ends
- *within* a reference there should be no blank lines
- all of the references in the file should follow a more or less consistent format

There is also one **optional requirement**:

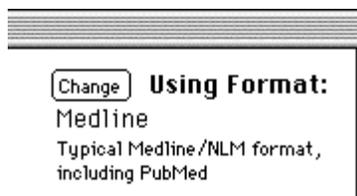
- the file should contain only references—no titles, headers, footers or other effluvia

This is optional because as long as each page header or other gibberish is separated from its neighboring references by blank lines, it will simply be spit out by Papyrus as an unrecognizable “reference.” But if your file has page headers that run right into the references, then you will need to remove these headers with your word processor prior to importing the file into Papyrus.

---

Files that come from bibliographic databases—whether CD-ROM, online, or monthly diskette—almost always meet all of these requirements. (We *are* trying to be reasonable here!)

## Import format



Okay, so you've got your file of interesting references. Next you need to explain to Papyrus how these appear. You do this via a Papyrus **import format**.

If you are loading references from a commonly available source, then the odds are excellent that we have already provided the import format you need in one of our Format Libraries. You can open each relevant-sounding Format Library and copy any useful formats into your own database.

In other cases you will have to devise your own import format. The following chapters provide extensive guidance for that task. Our Technical Support department is also always happy to assist you.

## Fussiness level



The **Fussiness level** you select can have significant effects on the outcome of your import. It addresses a trade-off inherent in the way Papyrus imports references.

Papyrus contains a very large store of knowledge regarding references and their components—things that I sincerely hope you will never have to think about yourself. For example, it knows that a book's title may be followed by a volume number, and that such volume numbers are generally preceded by **Volume**, **Vol.**, **vol.**, or the like. Therefore, when Papyrus is scanning an incoming reference, if what it has tentatively identified as the title contains the word **vol.**, this is

---

probably not simply a title but rather a title plus a volume number. Papyrus will therefore conclude that it has made a mistake in deciding which part of the incoming information is the reference's title. So it will back up and try a different way of matching the reference to the import format.

Papyrus has dozens of these little rules, and they yield important improvements in Papyrus's accuracy during imports. Unfortunately, the rules are not universally true. Regarding our title/volume rule, for example, consider any French works on *flight* (English "flight" = French "vol").

Such helpful but imperfect rules are generally called **heuristics** by artificial intelligence people. (And you thought Papyrus was just another dumb database program!) They are supposed to make computers smarter, but now and then they actually result in a complete and utter screw-up.

The import Fussiness level controls the extent to which Papyrus applies its heuristics. Set at **Finicky**, Papyrus will use all the rules it knows. At **Tolerant** it will let a lot of things slip by (such as **vol** appearing in a title). Finally, when set to **Oblivious** even strange punctuation (such as mismatched parentheses)) will be accepted.

In general, you should try **Finicky** for data files that do not always clearly separate each field from the next. This would include most word-processed bibliographies from your previous publications.

For most downloads from bibliographic databases, **Tolerant** will do the best job. You can also try it when **Finicky** has inexplicably rejected some references from a data file.

**Oblivious** should usually be reserved for trying to import references that Papyrus rejects at the **Tolerant** level.

Each of the import formats we provide contains an indication of the Fussiness level at which it is likely to perform at its best. But you may sometimes have to experiment with different Fussiness levels for your particular data files.

## Log file

**Log file:** PubMed download.log1

As Papyrus works through your source file, it create a **log file** summarizing its results. This is simply a text file that includes the first few lines of each incoming reference, followed by a message indicating whether the reference was successfully imported or not.

The log file also includes **warning messages**, alerting you to keywords or journal names that are new to your database, odd entries that Papyrus has cleaned up during the import, *etc.* You

---

should review these messages for your first few imports, as you develop a feel for how Papyrus behaves.

While importing, Papyrus will display the log file in a separate window so you can keep an eye on how things are progressing.

You can name the log file whatever you like. Papyrus's default suggestion is to add `.log1` to the end of your source file's name.

## Reject file

**Rejects file:** PubMed download.rej1

If there are any incoming references that Papyrus can't figure out, it will copy them to a **reject file**. Once the import is done you can open this reject file in your word processor and correct any typographical errors. Then you can tell Papyrus to try to import the now-corrected file.

In other cases you will simply tell Papyrus to try importing the reject file using a looser Fuzziness level.

You can name the reject file whatever you like. Papyrus's default suggestion is to add `.rej1` to the end of your source file's name.

If you later tell Papyrus to import this rej1 file, it will suggest a name for the *new* reject file of **rej2**.

## Duplicate references

**Duplicates file:** PubMed download.dup1

**Duplicate references**

Automatically skip     Pause to decide     Save anyhow

Merge incoming reference with existing reference

Save incoming reference, delete existing reference

As you can see, Papyrus provides several options for dealing with incoming references that are **duplicates** of references already in your database.

---

Papyrus is fairly intelligent about deciding when a reference is most likely a duplicate. It compares the **author names**, recognizing that, say, **Smith,AB** in the incoming reference could be the same person as **Smith, Alice B.** in the existing reference. It compares the **years**, recognizing that **2001** might correspond to **In Press**. It also compares the **title**, **pages** and a few other fields.

If Papyrus concludes that an incoming reference matches one already in your database, it then proceeds as indicated by your choice here:

#### Automatically skip

Papyrus will copy the incoming reference to the specified **duplicates file**, and will *not* add it to your database. Later you can review the duplicates file with your word processor. Or you can tell Papyrus to import the duplicates file, this time selecting **Pause** to decide to double-check its accuracy.

#### Pause to decide

Papyrus will pause in its progress through your source file, and display a window showing you both the incoming and the existing reference. Papyrus then waits for you to instruct it whether to keep your existing reference and skip the incoming one, delete the existing reference and replace it with the incoming one, merge the two references, or simply accept the incoming reference in addition to the existing one.

#### Save anyhow

The incoming reference is added to your database. A warning in the log file is the only indication that the reference is a duplicate.

#### Merge incoming reference with existing reference

Papyrus will add to your existing reference any new information it finds in the incoming reference. For example, if the incoming reference has an Abstract that was not already present in the existing reference, Papyrus will add that Abstract now.

#### Save incoming reference, delete existing reference

If you know in advance that the incoming references are more complete or accurate than the corresponding references already in your database, select this choice. The incoming reference will replace the existing one—Papyrus will also give you the option of re-using the existing **Reference #** for the incoming reference.

---

## Reference #s

**Starting number  
for incoming  
references:**

Retain incoming reference  
numbers (unless number  
is already in use)

You will usually want to let Papyrus start numbering the incoming references at whatever **Reference #** is the next available in your database. That's the number Papyrus suggests here.

But if you would rather bring in the new references with a distinctive range of **Reference #s** (starting at 10,000, maybe) you may do so by typing the starting number here.

If you are using an import format that includes **Reference #** as one of the incoming fields, then Papyrus will offer you the checkbox shown above. Checking this box tells Papyrus that it should keep the incoming number rather than assign a fresh **Reference #**.

## Keywords

**Keywords to add:**

Retain incoming keywords

De-capitalize incoming keywords

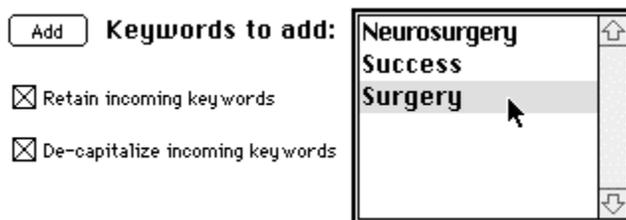
If the incoming references already have their own **keywords** you may or may not wish to keep them. For example, downloads from an online system such as Medline often include a lot of keywords that you might prefer to not have cluttering up your personal database. The **Retain incoming keywords** checkbox lets you keep these or not, as you prefer.

Some databases store their keywords in ALL UPPERCASE. If you check the **De-capitalize incoming keywords** box then Papyrus will convert these to mostly Lowercase.

You can add one or more keywords to **all** of the incoming references. For example, if you are importing the results of an online search, you might wish to assign your own keyword to each of the references indicating their common topic.

---

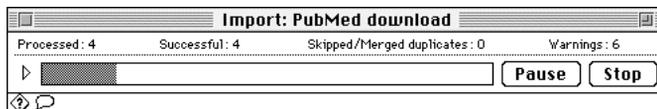
When you click the **Add** button your **Keywords window** will open, allowing you to select the relevant keywords. These will then appear in the Import dialog:



You can **drag** these keywords to rearrange them, and you can use your **delete** key or choose **Clear** from the **Edit** menu to remove any from the list.

## Running the import

After you click the **Proceed** button in the import set-up dialog, the **Import window** appears:



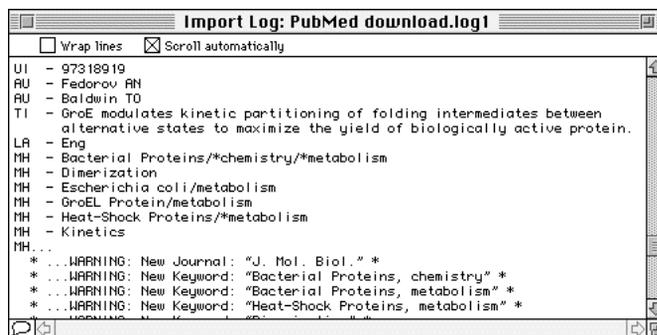
Here you can monitor the overall progress of your import.

The **Pause** button allows you to temporarily halt the import—this might come in handy if you want to pause a large import so that you can turn your computer's full attention to another task.

This doesn't imply that you *must* pause an import to accomplish other work with your computer. Papyrus monitors your computer's other activities and automatically scales back its own demands on the machine when you are working in other programs (or in other Papyrus windows).

Click the **Stop** button to abort the import.

When the import begins, Papyrus also opens an **Import Log window**:



This window shows you the **log file** as Papyrus records its progress through your import. You can see the first several lines of each reference, followed by any **warnings** or error messages.

You can close the Import Log window if you like. In fact, with the Import Log window closed your import will run slightly faster, since Papyrus will not constantly need to update this window.

Even with the Log **window** closed, Papyrus will continue to write its warnings and errors to the **log file**. You can always review the log file later in either Papyrus or your word processor.

Did you notice that little **triangle** in the Import window, to the left of the progress bar? Clicking the triangle expands the Import window so that you can more closely follow and alter Papyrus's importing behavior. This comes in particularly handy when you are creating and "debugging" a new import format. See the REFERENCE chapter *Import* for all the details.

---

## See Also...

You should now have a good feel for the general procedure of importing references into Papyrus from other sources. Of course, the most important aspect of all this is the one I have so far barely touched upon—designing an appropriate import format for each data source.

In the next chapter, *Importing—Predefined, Straightforward*, I will lead you through the steps of importing references from nice, clean sources for which we have already provided import formats.

Then in *Importing—Predefined, Complicated* I will address the issues that arise when a source is neither nice nor clean. The output of some bibliographic databases is cumbersome, irrational, or just plain inconvenient. We have provided import formats for many of these, but there are some extra steps needed in performing these imports.

*Importing—Word Processor Bibliography* shows you how to create an import format designed to match a bibliography that you already have in your word processor.

Finally, *Importing—Other Structured Databases* gets into all of the details you need in order to set up import formats to handle sources not provided for in our Format Libraries. The chapter begins with some simple cases, and then continues on to increasingly ugly situations.

---

## See also:

### CONCEPTS

*Reference Types and Fields*

### REFERENCE

*Reference Types and Their Fields*

*Formats Window*

*Import*

*Using Papyrus with TeX, LaTeX, and BibTeX*

---

## Importing—Predefined, Straightforward

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---

## Introduction

---

**Be sure to read the *Importing—Overview* chapter before starting this one.**

---

Many bibliographic databases are very well-behaved, producing output files that are almost completely self-consistent and predictable in form. Among these solid citizens are Current Contents on Diskette, most versions of Medline (PubMed, NLM, BRS, Dialog, PaperChase, Ovid, Silver Platter, etc.), Chem Abstracts (STN, Dialog), Biological Abstracts, and BIOSIS. (These are certainly not the only pleasant sources, just some of the biggies.)

You will find import formats for these well-behaved sources in our various import Format Libraries. You need only copy the relevant format from the Library to your database and then perform the import at the Fussiness level suggested by the format. If any references are rejected, try importing the reject file at a looser Fussiness level.

In general with these sources there is no need for you to edit the downloaded file prior to importing it into Papyrus. However, should you decide to do so (*e.g.*, to remove some uninteresting references from the file), be sure to save the result as a **plain generic text file** when you're done. Any other file format is likely to either insert strange word-processor codes into the text, or else screw up the indentation of the references.

## Altering Assumptions

We have set up our formats with certain assumptions; you can edit the formats if you disagree with any of these assumptions. For example, we have usually chosen to not retain affiliation/address information about the authors—you will find a **Discard** indicator in the format templates at the point where such information appears in the incoming references. So if you *would* like to retain this information, you need only edit the format and change the appropriate **Discard** to **Affiliation/Address**.

Similarly, we have used the **Abstract** indicator to tell Papyrus to store incoming abstracts into its **Abstract** field. If you do not want to keep abstracts in your database, change this to a **Discard**.

## Troubleshooting

There are two chief things that can interfere with imports from these well-behaved sources. The first is when a rogue data-entry clerk decides to make up new rules while typing in some particular reference. Fortunately this is not too much of a problem for the sources we are discussing in this chapter. If a reference does get rejected during one of your imports, you will probably be able to use your word processor to correct the offending portion and then re-import it.

---

The more serious problem is that every year or so the curators of these bibliographic sources—no doubt feeling a need to express their personal creativity—decide to modify something in their product’s output style. These are sometimes very small changes, ones that will have no effect on your Papyrus imports. Others are medium-size changes that necessitate small modifications to a Papyrus import format. And occasionally certain database vendors have been known to completely rearrange their output files, without warning anyone.

**If you find that a Papyrus import format that always used to work fine has suddenly stopped doing so, it is likely that your data suppliers have been fooling around with their output style.** You should compare your downloaded files with the Papyrus format and see if you can detect what has changed. If you can figure this out then you need only edit the Papyrus format to match the new style, and all should be well (for another year, anyway).

But if you cannot figure out what has changed, or if you do not see how to modify the Papyrus format to deal with the changes, then get in touch with us. If you are one of the first to report the problem we will probably ask you to send us a copy of some of your downloaded data so that we can examine it ourselves. If others have preceded you then we can simply send you the new format.

## See Also...

If you have a source of bibliographic data for which we do not provide an import format, our Technical Support department will be happy to help you create an appropriate import format. There is no charge for this service.

As we update old import formats and create new ones, from time to time we post updated Format Libraries to our Web site. You can often save yourself some time and trouble by checking our site to see if we’ve already created the import format you need.

---

## See also:

### CONCEPTS

*Reference Types and Fields*

### REFERENCE

*Reference Types and Their Fields*

*Formats Window*

*Import*

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## Importing—Predefined, Complicated

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---

## Introduction

---

**Be sure to read the *Importing—Overview* and *Importing—Predefined, Straight-forward* chapters before starting this one.**

---

Some bibliographic databases yield output that is difficult or impossible for Papyrus to import. There are three ways they accomplish this:

- Providing the bibliographic information in a consistent fashion, but in a way that makes it difficult for Papyrus to accurately discern the boundaries between the various items.
- Providing the information in an inconsistent fashion, where every data-entry clerk seems to have been encouraged to type in authors, titles, and the other fields according to personal preference.
- Both of the above.

For sources of the first kind, we have responded by creating **plug-in filters**. These are small conversion programs invoked by some Papyrus import formats to clean up the incoming data before Papyrus attempts to match it to the format templates.

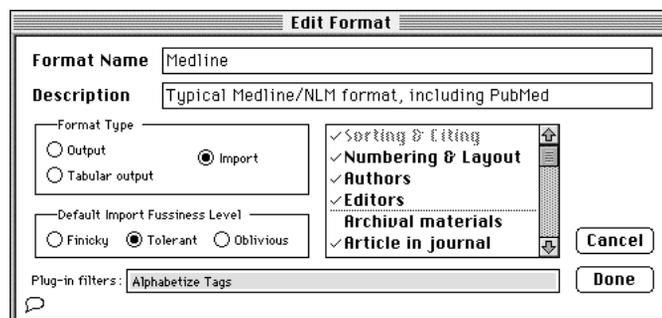
For the second category, where no two incoming references look alike, we have produced extremely convoluted import formats. These are designed to cope with as many variant entry forms as seemed practical. Because the formats are so complicated, their imports tend to run more slowly than others.

Some of these inconsistent databases are *so* ugly that a single complex import format is not enough. For these we have had to create a collection of **multiple import formats**.

## Plug-in filters

Plug-in filters are stored in your Papyrus Additions folder.

An import format can specify one or more filters:



In this example, the Alphabetize Tags filter is specified. This filter will take incoming data such as:

```

UI - 97318919
AU - Fedorov AM
AU - Baldwin TO
TI - GroE modulates kinetic partitioning of folding intermediates between
    alternative states to maximize the yield of biologically active protein.
LA - Eng
MH - Bacterial Proteins/*chemistry/*metabolism
MH - Dimerization

```

and convert it to:

```

AU - Fedorov AM
AU - Baldwin TO
LA - Eng
MH - Bacterial Proteins/*chemistry/*metabolism
MH - Dimerization
TI - GroE modulates kinetic partitioning of folding intermediates between
    alternative states to maximize the yield of biologically active protein.
UI - 97318919

```

Since different sources of Medline data provide the various “tags”—UI, AU, TI, *etc.*—in different orders, using the Alphabetize Tags filter allows us to create a single common import format that can expect to encounter all of the tags in alphabetical order.

Other plug-in filters include:

**Silver Platter**—Used with data obtained from any of the many databases distributed on CD-ROM under the **Silver Platter** brand.

**Outdent Percents**—Used with formats based on Refer, including data exported from the **EndNote** bibliographic software.

---

We create new plug-in filters from time to time, and post them to our Web site. If you have an importing challenge that you feel requires a new plug-in filter, please provide our Technical Support department with a small sample file and we'll see what we can do to help you.

## Multiple import formats

When a data source is extremely inconsistent, even the most convoluted import format may prove inadequate to handling all of the variant entry forms. In such cases you must use a **series** of formats.

For example, to cope with the **GeoRef** database as provided by the Silver Platter CD-ROM we are currently up to *four* separate formats (there may be more by the time you read this). This particular database actually falls into the third category of challenging databases, where the various fields are both unpredictable and indistinguishable, so each of the import formats must also use a special **plug-in filter**. The downloaded data is imported using the first of the four import formats. The rejects from *that* import are then re-imported using the second import format. And so on, until all the variants have been accepted by one format or another.

## See Also...

---

### See also:

#### CONCEPTS

*Reference Types and Fields*

#### REFERENCE

*Reference Types and Their Fields*

*Formats Window*

*Import*

*Plug-in Filters*

*Using Papyrus with TeX, LaTeX, and BibTeX*

## Importing—Word Processor Bibliography

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## Introduction

---

**Be sure to read the *Importing—Overview and Creating New Output Formats* chapters before starting this one.**

---

In this chapter I will show you how to import existing word-processed bibliographies into Papyrus. How well this works depends entirely on how self-consistent the original typist was in formatting the references.

To illustrate what I mean by “self-consistent,” suppose one article in a bibliography were entered as:

Smith, J.A. and C.B. Jones. A really important study. *Journal of Major Import* 123: 523-537, 1991.

but another in the same bibliography looked like:

Rogers R; Hammerstein O: Language acquisition among the Cockney. *J. Broadway* 1961. Vol. 32, pp. 23-27

This would be an excellent example of a bibliography that was *not* self-consistent. For a less blatant inconsistency, consider this hypothetical citation:

Galápagos, I.S. and P. W. Finch (1840): Suggestions for increasing tourism. *Journal of Cosmetic Ornithology*, 14:281-284.

It is okay that the first author’s initials follow his/her surname while those of the second author precede his or hers. That is a very common bibliographic convention. However, it is *not* okay that there is a space between P. and W. but no space between I. and S. Papyrus has to be *extremely* fussy about the presentation of author names and initials in order to stand any chance of figuring out tough cases such as this one:

Smith, JA, Jr, Rogers, CB, Jones, RI, III, Waters, JJ

(We’ll return to this issue of inconsistencies in author names later in the chapter.)

Even if your bibliography is less than impeccable, though, do not yet despair. Before this chapter is done I will present several tricks to help cope with the most common sorts of obstacles.

## Preparing the document

All right, let’s begin by supposing that you have a bibliography in your word processor that you would like to load into Papyrus. Your first task is to save a copy of the word processed document as a plain generic text file. This will cause all word processor codes to drop out, leaving only the actual text of the references.

---

It will also convert all text to the standard Roman script system. This means that special characters in the **Symbol** font or in a different writing system will be lost.

If this is an issue for your document you should first do a search-and-replace in your word processor to convert such non-Roman characters to some sort of temporary code. For example, you might replace  $\alpha$  with **/alpha/** and  $\Sigma$  with **/Sigma/**. Then later you can use Papyrus's search-and-replace facilities to convert these back to the correct font.

Next, take a look—with your word processor, or with Papyrus's **Open Text Document...** command—at the text file you have just created. Papyrus requires at least one blank line between each reference and the next. If there are no such blank lines, then use your word processor to insert them.

The easiest way is generally to tell your word processor to search for **[Hard Return]** and replace it with **[Hard Return][Hard Return]**.

Okay, you now have a file that is (hopefully) importable. The next step will be to set up a Papyrus import format that matches the style used in your file. Before turning to Papyrus you might wish to print out a page or two of your text file for easy reference.

## Creating the format

In Papyrus, open the **Formats window** and click the **New...** button. Make up a name for your format and add whatever description you wish. For Format Type choose **Import**. Set the Default Import Fussiness Level to **Finicky**.

Now turn back to the *Creating New Output Formats* chapter of this **WORKBOOK** for a review of setting up a format. Even though you are now creating an *import* format, you will proceed exactly as if you were trying to create an output format to match the style used in your bibliography file.

But do not get more complicated in your format than is called for by your **text file** version of the bibliography. For example, do not italicize or boldface any fields—all such character formatting was removed from your file when you saved it as plain text. And do not overcomplicate your format by including a lot of unnecessary **If First** or **If Any** brackets—if none of your actual references includes, say, an Issue number, then there is no need to account for the optional presence of the **Issue** field within your format template.

By way of example, let's pretend that your bibliography was supposed to be in the American Psychological Association ("APA") format.

I say "supposed to be" because the APA format is so picky, demanding, and in places irrational that we have yet to encounter the human capable of typing an entire APA-style bibliography without breaking at least a few of the rules.

Here is a sample reference straight from the APA style manual (4th edition):

---

Bekerian, D. A. (1993). In search of the typical eyewitness. *American Psychologist*, 48, 574-576.

And here is the Article template of the APA **output** format that is provided with Papyrus:

```
Author . (Year [ , Day & Month ] ). [ Title . ]  
[ In Issue Editor (Role of "Editor" ) ,  
Issue Title , ] Journal Name [ : Journal Series  
] [ , Volume ] < ( Issue , Supplement ) > [ ,  
Pages ] . [ ( Also Print ) ]
```

Now, there is a lot going on in this output format that you would not need just for importing a file full of straightforward references like the sample shown. For example, the **Day & Month** bit is there only for journals that require their Day & Month to be given, which is rare. The **underlining** is unnecessary, as I've already discussed. If your citations are to typical journals, then you will not have to worry about **Journal Series**. There are **If First** brackets around **Volume** and **Pages** because the output format has to cope with references still in press; you do not need those brackets if all (or nearly all) of the references in your file do indeed have a Volume and Pages. And so on.

In fact, assuming that the bulk of journal article citations in your file resemble the above sample, the Article template of your import format could simply be:

```
Author . (Year) . Title . Journal Name , Volume  
[ ( Issue ) ] , Pages .
```

Much less intimidating, yes?

Once you've got the first draft of your import format, a helpful next step is to take one or two typical references from your bibliography and **manually enter them into Papyrus**. Then have Papyrus display these references using your new format. (You will first have to temporarily change your format's Type from **Import** to **Output**.) You can then compare these results to your original file and see if you got everything correct (periods, commas, spaces, *everything*). If not, then go back and tweak your format until the results look perfect.

---

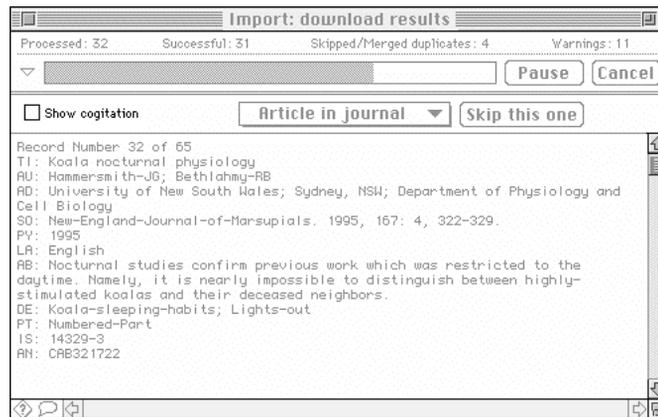
There is one discrepancy you *can* get away with. If there are **spaces** anywhere within your template (between the Title and the Journal Name, for example), you need not worry whether these are supposed to be one space, two spaces, three spaces, *etc.* When Papyrus imports a reference, among the very first things it does is convert each string of spaces in the incoming reference to a *single* space. It does the same with each string of spaces appearing within your format. So while your format *does* need to distinguish between no spaces vs. one-or-more spaces, it does *not* need to distinguish between one space vs. two-or-more spaces.

Okay, you've created the first draft of your new import format. Go ahead and try importing your file. (For this type of import I suggest you start with a Fussiness level of Finicky.)

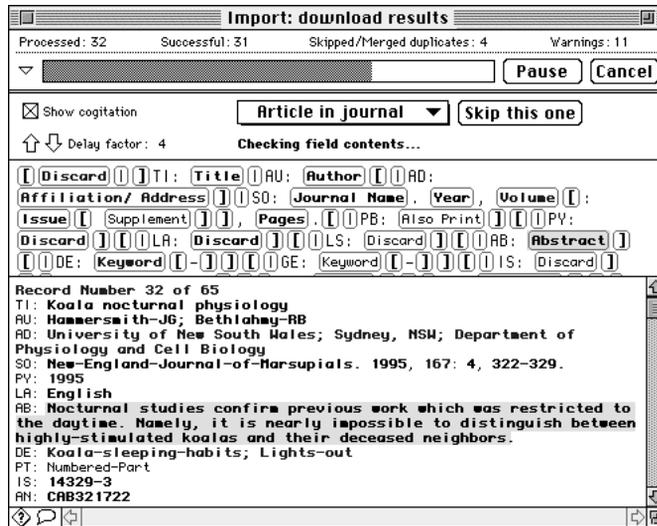
How did you do? If you based your import format on truly typical samples from your file, then the import should have successfully brought in at least *some* references. Next you need to look at the rejected references and see what is different about them. Then you can either use your word processor to edit the rejects, or you can modify your format to better fit them and then try importing again.

## Debugging

When you expand the **Import window** to its full form, one of the newly-revealed controls is a checkbox labeled Show cogitation:



Clicking this box switches the window into “**debugging**” mode:



The top part of the window shows the format template that Papyrus is currently trying to match to the incoming reference. As it proceeds through the template, Papyrus highlights the part of the template and the matching part of the incoming reference that it is currently evaluating. When there is a tentative match, Papyrus colors the corresponding parts of the template and incoming reference to so indicate.

In many cases where your import is not going well you will be able to determine why by carefully watching the debugging view as Papyrus tries to match the pieces of your template to the incoming data.

All the details on debugging mode can be found in the [REFERENCE](#) chapter *Import*.

## The “sieve” approach

You do not have to import all of the references from your file in a single pass. For example, suppose that half of the references list their authors like this:

A.B. Smith, C.D. Rogers, and E.F. Jones...

while the other half omit the comma before the “and”:

A.B. Smith, C.D. Rogers and E.F. Jones...

---

This is exactly the sort of thing about which Papyrus gets extremely persnickety. So set up your format to include the comma, and run the import. Half of the references will be imported, the other half will be sent to the reject file. Now change your format so that it omits the comma, and tell Papyrus to import the previous rejects.

The same approach works well when other elements of the references, such as Volume or Pages, have been entered in more than one way, perhaps with differing punctuation. Import all of those that were typed one way, then modify your format to bring in another batch from the reject file.

If you can successfully import a whole group of references at a time just by modifying your format, then this will be quicker than using your word processor to individually edit each of your references into conformity.

## Sacrifice the few for the many

If the bulk of references in your bibliography are reasonably consistent journal articles, but there are also a few books and chapters scattered here and there, then just concentrate on the journal articles. Once you've got those imported you can see how many books and chapters remain in your final reject file. If you think you can quickly set up Book and Chapter templates to work for these, then by all means go ahead and do so. But it will sometimes be quicker to simply print out the final reject file and enter these few remaining references into Papyrus by hand.

Of course, you can save some typing—particularly of lengthy titles and comments—by using Copy/Paste or Drag/Drop to move text from your word processor to Papyrus.

## Full Names vs .Initials

As I've indicated a few times, Papyrus is *very* picky about author punctuation, so that it can correctly handle the worst cases that might arise. However, your particular bibliography most likely doesn't include many instances of those worst cases.

To have Papyrus loosen up on this, choose Full rather than Initials for **First name(s)** in the **Authors** section of your format. When set to Full Papyrus will accept *either* spelled-out first names *or* simply initials. Choosing Full also causes Papyrus to accept initials regardless of whether they are separated by a period and a space, just a period, just a space, or neither.

So if your file contains a variety of punctuation between author initials, or a mixture of initials and spelled-out first names, try the Full setting and review the results.

---

## Journal Names vs .Abbreviations

If you see that some of your journal article citations include a **full journal name** while others show only a **journal abbreviation**, then in your Article template use Journal Name rather than Journal Abbreviation.

When matching incoming text to the Journal Name field, Papyrus will check whether there are any **periods** within that text. If there are, then Papyrus will consider the text to be an abbreviation; otherwise it will be considered a name.

## Do not be too proud

If you are getting nowhere after an hour or two, *please stop* We did not sell you Papyrus in order to make you frustrated.

Though I sometimes wonder whether *all* software companies can make that claim...

We can usually help people with this sort of import via a simple e-mail or phone call. We might ask you to e-mail or fax us a page or two of your bibliography.

**We are happy to assist you with your imports. If necessary we will set up the necessary import format for you. There is no charge for these services.**

---

## See Also...

Although in this chapter I've presented the most important information and tricks for creating an import format to deal with word-processed bibliographies, there is no substitute for experience. Over the years we here at Research Software Design have amassed a huge collection of tricks. Yet sometimes I still find myself staring at a disappointing format for an hour, only to finally realize that I typed a period where I should have entered a comma.

It's true that Papyrus is extremely picky about such small details. And I share your inevitable wish for a computer program smart enough to just look at a list of references and recognize that *this* bit is a book title and so *that* must be a publisher's name.

But until that day arrives please be patient with your humble computer, and with us. And feel free to contact our Technical Support department for assistance, particularly with your first import format or two.

---

## See also:

### CONCEPTS

*Reference Types and Fields*  
*Output Formats*

### REFERENCE

*Reference Types and Their Fields*  
*Formats Window*  
*Import*

---

## Importing—Other Structured Databases

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---

## Introduction

---

**Be sure to read the *Creating New Output Formats* chapter, as well as *all four* of the preceding import-related chapters, before starting this one.**

---

This final chapter on importing covers the most complicated thing you can do with Papyrus—creating a new import format to deal with data sources for which we have not already provided. I will begin with relatively easy cases and gradually get more complicated. At the end of the chapter I'll offer some guidance for coping with truly nightmarish sources.

---

**Another important resource for your understanding of import formats are the predefined formats we've already provided in the various import Format Libraries. When faced with a confusing source file, you might want to look through the predefined formats to see if we have already dealt with a similar source.**

---

The data sources I am addressing in this chapter are mainly the commercially-provided bibliographic databases—whether via the Internet, an intermediary service such as DIALOG, a CD-ROM, or monthly diskettes—but also the output from local or personal databases. The latter include both dedicated bibliographic database programs (such as Papyrus) and general-purpose database programs (such as dBase).

Some providers of bibliographic data do a better job than others. The ideal bibliographic database should have three characteristics:

First, **data entry** should be consistent. If in one reference the volume number appears after the journal name, separated simply by a comma, then it should not appear in another reference preceded by "vol".

Second, **output style** should be consistent. If in one reference the volume number appears on a line tagged VO-, then it should not appear in another reference on a line marked SO <VO>-.

Third, the **overall output form** should be such that a computer program can figure it out. Usually when you do a search with a commercial bibliographic database you have a choice of output styles in which to receive the search results. Some of these styles are easier for humans to read, while others are better for computer programs. There are a number of typical features that almost all database vendors provide in at least one of their output styles: (1) no blank lines *within* a reference; (2) one or more blank lines *between* references; (3) a clear method of **indentation** to define "paragraphs" of information within a reference; and (4) identifying "tags" at the beginning of each "paragraph."

The last two of these—indentation and tags—are not always essential for a successful Papyrus import. And an appropriate **plug-in filter** can even compensate for a problem in the other features. But things are simplest if all four features are present.

---

Most commercial bibliographic data sources do at least a fair job of following these criteria; many do an excellent job. Though a few are simply abominable. (Not that I would be so crass as to single out, say, AGRICOLA or GeoRef as specific illustrations of this last category.)

For personal/local databases, the biggest problem is usually inconsistency of data entry. For one thing, references have often been entered by several minimally-remunerated students, each following his or her own personal rules. For another, apart from Papyrus most personal bibliographic programs do not pay much attention to the data you enter—accidentally type in an author’s name without capital letters, or with the initials on the wrong side of the surname, and few programs will object. But when such an entry later shows up in an output file to be imported into Papyrus, there is no predicting how it will actually appear. This is an example of the famous computer acronym “GIGO”—garbage in, garbage out.

Actually, no real programmer has said “GIGO” since about 1959. Still, you might find applications for this handy phrase in other, non-computer aspects of your life.

When you need to create a Papyrus import format for a nice friendly database that follows the rules of consistency and machine-readability, your task will not be especially difficult. As the data get uglier and uglier, though, your job will get harder and harder. As I’ve mentioned elsewhere, **if you are getting nowhere after an hour or two, please stop and e-mail/phone/fax/write us for assistance.**

---

## Brackets and special codes

First let me remind you of some special codes available to you when defining a Papyrus format:

- `|` Paragraph break here.
- `[...]` The contents of these If First brackets *may or may not* appear in a particular reference.
- `<...>` These If any brackets are the same as the If First brackets, but they allow for more complex interdependencies of the elements appearing within the brackets.

Here are two others that will be useful for import formats:

- `Discard` Special “field” code meaning “something appears at this point in the reference, but we will not retain it when importing the reference into Papyrus.”
- `[[...]]` These Multiple brackets are the same as the If First brackets, but whatever appears within them may repeat any number of times.

If any of these don't make sense to you right now, they will after we use them in some examples.

## Layout

I'll start with a source that uses a **Medline-style** output. Medline is an online database maintained by the National Library of Medicine. While we have already provided predefined import formats for many vendors and repackagers of Medline (each of whom has invented its own variation on the NLM's format), the same principles will apply to many other database sources.

---

**Note: The format we'll create in the rest of this chapter is for teaching purposes only. For actual Medline imports you will want to use one of the predefined import formats that we have provided with Papyrus.**

---

Here is a sample reference in a Medline-style format:

```

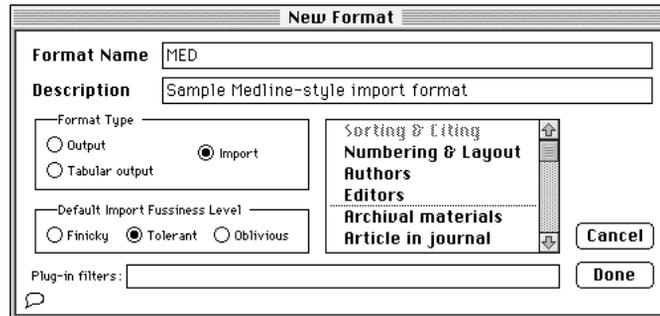
13
UI - 77198273
AU - Smythe AB; Jones CD
TI - Physiology of the koala
LA - English
MH - MARSUPIAL; POUCH; *SLEEP
AD - Institute of Cuddly Creatures, 400 Pitt Street,
    Sydney, NSW, Australia.
AB - This article discusses various important
    aspects of a number of topics concerning no
    small nor insignificant matters pertaining
    to the physiology of certain marsupial beasts.
SO - N Engl J Med 1978;137(4):231-5

```

As you can see, the reference is broken into a series of what we will call **paragraphs**, and each paragraph begins with a two-letter **tag**. In this case the tags stand for Unique Identifier, Authors, Title, Language, MeSH Headings, Address, Abstract and Source.

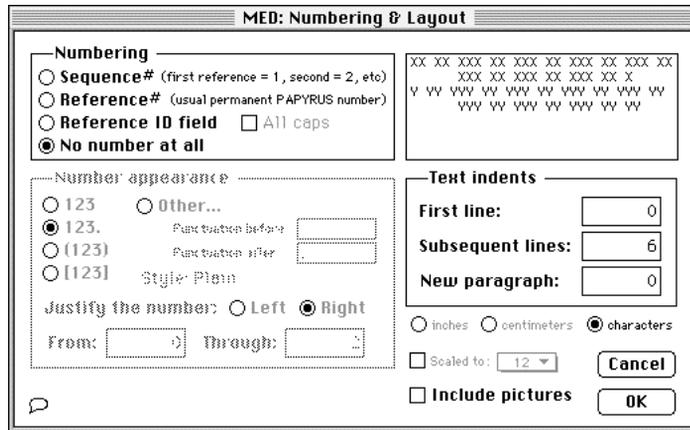
The paragraphs are distinguished by their **indentation**. Each paragraph—besides the very first one—begins at the left margin with the first letter of its tag, and all subsequent lines of the paragraph are indented 6 spaces. (Did you notice that there were *two* spaces between each tag and the hyphen?) When performing this import Papyrus will consider any line that has been indented 6 spaces to be a continuation line, while lines beginning in *any other position* will be treated as starting a fresh paragraph.

So let us start creating our import format. I will call mine MED:



Tolerant is usually the best Fussiness Level for this sort of import.

Next double-click **Numbering & Layout** and we'll fill in that section:



Note that even though the sample reference does show some sort of number on its first line, we’re telling Papyrus that there are no Reference nor Sequence numbers present. This is because we’re going to be *discarding* that first-line number, so there’s no need to treat it specially—it’s just a line of irrelevant text.

Also note that the indentation I’ve specified for First line and New paragraph are the same, even though that first-line number does appear to have been indented a few spaces. When using this import format, Papyrus will consider any line indented exactly 6 spaces to be a “subsequent line” of the current paragraph; *all* other lines will be considered to start a fresh paragraph, whether they are indented zero, two, or ten spaces.

## Authors

The **Authors** section of this format is straightforward. Recall that the corresponding part of the incoming reference looks like this:

AU - Smythe AB; Jones CD

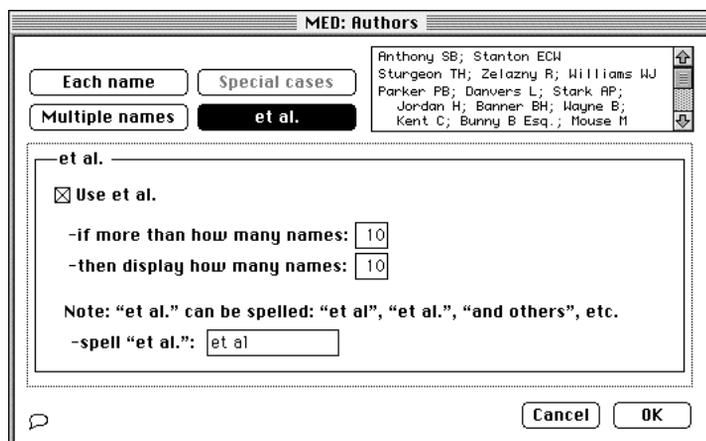
So we’ll tell Papyrus to put a space between each surname and its initials, and a semicolon-space between each author and the next:

**MED: Authors**

<b>Each name</b>	Special cases	Anthony SB; Stanton ECH Sturgeon TH; Zelazny R; Williams WJ Parker PB; Danvers L; Stark AP; Jordan H; Banner BH; Wayne B; Kent C; Bunny B Esq.; Mouse M
Multiple names	et al.	
<b>First name(s)</b> <input type="radio"/> None <input checked="" type="radio"/> Initials <input type="radio"/> Full		<b>First name punctuation</b> <input checked="" type="radio"/> SB <input type="radio"/> S B <input type="radio"/> S-B <input type="radio"/> S.B. <input type="radio"/> S. B.
<b>First author</b> <input type="radio"/> Firstname Surname <input checked="" type="radio"/> Surname Firstname Punctuation between: <input type="text"/>		<b>Subsequent authors</b> <input type="radio"/> Firstname Surname <input checked="" type="radio"/> Surname Firstname Punctuation between: <input type="text"/>
<input type="checkbox"/> Surname ALL CAPS <input type="checkbox"/> Firstname ALL CAPS		<input type="checkbox"/> Surname ALL CAPS <input type="checkbox"/> Firstname ALL CAPS
		<input type="button" value="Cancel"/> <input type="button" value="OK"/>

**MED: Authors**

<b>Each name</b>	Special cases	Anthony SB; Stanton ECH Sturgeon TH; Zelazny R; Williams WJ Parker PB; Danvers L; Stark AP; Jordan H; Banner BH; Wayne B; Kent C; Bunny B Esq.; Mouse M
<b>Multiple names</b>	et al.	
<b>Two Authors</b> Punctuation between the two names: ; <input type="text"/>		
<b>Three or more Authors</b> Punctuation between first two names: ; <input type="text"/> Punctuation between final two names: ; <input type="text"/>		
		<input type="button" value="Cancel"/> <input type="button" value="OK"/>



The answers I've provided for the et al. questions correspond to official National Library of Medicine usage.

## Editors

For imports from Medline the **Editor** questions are irrelevant, as Medline and the services that derive from it contain only journal articles—which do not have Editors.

Actually, some older parts of Medline do contain a few Books and Chapters. However, these account for a fraction of a percent of the total; since 1981 only Articles have been added to the database. Moreover, the Books and Chapters were not entered in a consistent fashion in the first place. Bottom line: if the National Library of Medicine is the ultimate source, don't worry about reference types other than Article.

For data sources that *do* include editors, the Editors section of your import format will usually be straightforward to fill in.

## First draft template

Now comes the main event—the template for **Article in journal**. Here's a reminder of what our incoming references look like:

```

13
UI - 77198273
AU - Smythe AB; Jones CD
TI - Physiology of the koala
LA - English
MH - MARSUPIAL; POUCH; *SLEEP
AD - Institute of Cuddly Creatures, 400 Pitt Street,
    Sydney, NSW, Australia.
AB - This article discusses various important
    aspects of a number of topics concerning no
    small nor insignificant matters pertaining
    to the physiology of certain marsupial beasts.
SO - N Engl J Med 1978;137(4):231-5

```

And here's a first attempt at the corresponding template:

```

Discard |
UI - Discard |
AU - Author |
TI - Title |
LA - Discard |
MH - Keywords |
AD - Discard |
AB - Abstract |
SO - Journal Abbreviation Year [ Day & Month ] ;
    Volume ( Issue ) : Pages

```

As you enter this template, Papyrus tries to help keep it legible by automatically moving to a **new line** following each `|`, and by **coloring** each paragraph differently from its neighbors.

As you can see, we are telling Papyrus to discard the number at the start of the incoming reference, as well as the Unique Identifier, Language and Address. If you wished to retain any of these, though, you could change `Discard` to the appropriate field code. For example,

```
AD - Affiliation/ Address |
```

Similarly, if you did *not* want to retain the Abstract, you would change that field code to `Discard`.

Note that I've indicated that `Day & Month` might appear after the `Year`. This field wasn't present in the above example, but I know from many other examples that Medline sometimes provides `Day & Month` in this position. Before we're done in this chapter there will be some other `If First` brackets added to our template.

Despite my previous obsession about *two spaces* appearing before each hyphen, you'll note that I've included only a *single space* at those points in the template. Although we did indeed

---

need to be very careful about this when we specified the **indentation** rules, we do not need to be as picky here. For each reference in the source file, once Papyrus has figured out the paragraph indentation it will then convert any series of spaces in the incoming reference to a *single* space. It will also discard any spaces that appear at the very beginning or very end of a paragraph. Similarly, any series of spaces within your format template will also be converted to a single space.

I've used the **Keywords** field code here, rather than Major Keywords or Minor Keywords. Papyrus will treat any incoming keyword containing an **asterisk** as a **major** keyword; the rest will be considered **minor**. Usually this is the way you will want to handle keywords in your own templates. The exception would be when dealing with a source in which major keywords appear in one paragraph and minor keywords in another.

Let's not forget the **Details** section:

<b>Keywords</b>	<b>Punctuation between keywords:</b> <input type="text" value=";"/> <input type="button" value="()"/>
<b>Journal Abbreviation</b>	<input type="radio"/> With periods <input checked="" type="radio"/> Without periods Abbreviation style <input type="text" value="Standard"/>
<b>Pages</b>	<input checked="" type="radio"/> Full ("132-137", "200-203", "411-412", "1395-1398") <input type="radio"/> Simple ("132-7", "200-3", "411-2", "1395-8") <input type="radio"/> Chicago ("132-37", "200-203", "411-12", "1395-98") <input type="radio"/> MLA ("132-37", "200-03", "411-12", "1395-98") <input type="radio"/> Oxford ("132-7", "200-3", "411-12", "1395-8") <input type="checkbox"/> Spell "p./pp.": <input type="text" value="p./pp."/>

The Punctuation between keywords is simply the semicolon-and-space apparent in the sample reference.

Indicating that incoming Journal Abbreviations are **Without periods** implies that Papyrus is to automatically *add* periods while importing, in this case converting N Engl J Med to N. Engl. J. Med.

If your Papyrus database had established more than one style of abbreviating journal names, then this Abbreviation style pop-up menu would now allow you indicate the style of the incoming abbreviations.

Papyrus can figure out for itself that 231-5 is an abbreviated form of 231-235, so it does not need you to explain that incoming Pages are in the **Simple** style. However, you do still have the ability to indicate a **prefix** of p./pp., Page/Pages, *etc.* for the Page field. For our Medline-style reference, though, this doesn't apply.

Before proceeding any further, you should convince yourself that the above template does indeed match the sample Medline-style reference.

---

## Missing pieces

Next we need to consider a few special situations that may arise in our source file. First, some of the references will lack one or more fields. For example, many databases will display the Language only if it is not English, so the LA paragraph will often be absent. Not all references have an Abstract, and not all include MeSH Headings. In fact, some references will even lack Authors—this is Medline’s way of dealing with some of its Anonymous entries. So let’s throw in some more If First brackets:

```
Discard |
UI - Discard |
| AU - Author | |
TI - Title |
| LA - Discard | |
| MH - Keywords | |
| AD - Discard | |
| AB - Abstract | |
SO - Journal Abbreviation Year | Day & Month | ;
Volume ( Issue ) : Pages
```

Do you see how these brackets account for the possibly missing fields?

---

**I will now make an exceedingly important point.**

---

You have to be careful how you combine your brackets with your paragraph breaks. For example, the following template would work equally well as the one above:

```
Discard |
UI - Discard
| | AU - Author | | |
TI - Title
| | LA - Discard | | |
| | MH - Keywords |
| | AD - Discard |
| | AB - Abstract | | |
SO - Journal Abbreviation Year | Day & Month | ;
Volume ( Issue ) : Pages
```

But this template is flawed:

```

Discard |
UI - Discard | AU - Author | |
TI - Title |
| LA - Discard | |
| MH - Keywords | |
| AD - Discard |
| AB - Abstract | |
|
SO - Journal Abbreviation Year | Day & Month | ;
Volume ( Issue ) : Pages

```

It's evident from Papyrus's auto-formatting that something is screwy in here. There is a missing `|` between the UI and AU paragraphs. And there is an extra one between AB and SO.

A related issue with brackets and paragraph breaks is that **a template should never end with a `|`**. That would mean "There is a paragraph break following the final paragraph of the incoming reference," which is—by definition—not possible.

Suppose that in our source file we found a few references with an additional paragraph following their SO paragraph, let's say an MI field, for Miscellaneous Information. When this information is present we wish to store it in the Papyrus Also Print field:

```

Discard |
UI - Discard |
| AU - Author | |
TI - Title |
| LA - Discard | |
| MH - Keywords | |
| AD - Discard | |
| AB - Abstract | |
SO - Journal Abbreviation Year | Day & Month | ;
Volume ( Issue ) : Pages |
| MI - Also Print |

```

There is a problem with the way I've handled this. Imagine an incoming reference with no MI paragraph. When matching our template to this reference, Papyrus will ignore the final bracketed MI stuff, effectively leaving us with this template:

```

Discard |
UI - Discard |
[AU - Author | ]
TI - Title |
[LA - Discard | ]
[MH - Keywords | ]
[AD - Discard | ]
[AB - Abstract | ]
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume ( Issue ) : Pages |

```

Since this ends in a `|`, it is not correct. The *correct* approach would have been to work backwards from the end of the template, always ensuring that the absence of one or more incoming paragraphs would not leave us with a screwed-up arrangement of `|`s. In this case we would thus end up with:

```

Discard |
UI - Discard |
[AU - Author | ]
TI - Title |
[LA - Discard | ]
[MH - Keywords | ]
[AD - Discard | ]
[AB - Abstract | ]
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume ( Issue ) : Pages
[MI - Also Print ]

```

Can you see why this is a correct solution?

---

## Variant pieces, Part 1

Okay, here is where we left our template:

```
Discard [ ]
UI - Discard [ ]
[ ] AU - Author [ ] [ ]
TI - Title [ ]
[ ] LA - Discard [ ] [ ]
[ ] MH - Keywords [ ] [ ]
[ ] AD - Discard [ ] [ ]
[ ] AB - Abstract [ ] [ ]
SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume ( Issue ) : Pages
```

We need to account for references that lack an Issue—almost all databases will suppress the parentheses in the SO line if there’s no Issue to display inside them:

```
SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume [ ( Issue ) ] : Pages
```

While we’re at it, let’s also handle Supplements:

```
SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume [ ( Issue [ Supplement ] ) ] : Pages
```

As you can see, we can **nest** one set of If First brackets inside another.

However, what I’ve specified here assumes that there will never be a Supplement unless there’s also an Issue. Remember, these are If First brackets—if the *first* enclosed field is absent then the *entire* bracketed section will be ignored. Unfortunately, sometimes a Medline article *will* have a Supplement without an Issue.

So this would be a good place to use If Any brackets instead:

```
SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume < ( Issue Supplement ) > : Pages
```

Now Papyrus will be willing to accept either an Issue, a Supplement, or both inside a set of parentheses. But if neither is present, and there are no parentheses, that will be okay too.

---

But, I hear you brighter students asking, how will Papyrus interpret **(7)** or **(Part 2)**? How will it know that **7** isn't a Supplement, or that **Part 2** is just one field, namely a Supplement and not an Issue?

The answer lies in those **heuristics** that Papyrus employs. We've built into Papyrus some knowledge of how typical Issues and Supplements will and won't appear. The relevant built-in rules will be in place as long as you run your import at **Finicky** or **Tolerant**. At **Oblivious**, though, all bets are off.

• • •

Now suppose that on further examination of our source file we discover that its creators were imperfect. Specifically, *some* of the references display their AB paragraph *after* the SO paragraph, rather than before it.

Well, we *could* create a second new format with a new template for these upside-down references:

```
Discard [ ]
UI - Discard [ ]
[ ] AU - Author [ ] [ ]
TI - Title [ ]
[ ] LA - Discard [ ] [ ]
[ ] MH - Keywords [ ] [ ]
[ ] AD - Discard [ ] [ ]
SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume < ( Issue Supplement ) > : Pages
[ ] [ ] AB - Abstract [ ]
```

As I pointed out in the previous chapter, you could then import a large batch of references from the source file using our first format, and thereafter import the rejects using this new format.

But it would be nicer if you only needed to perform a single import. So let us design a template that can handle *either* type of reference:

```

Discard [ ]
UI - Discard [ ]
[ ] AU - Author [ ] [ ]
TI - Title [ ]
[ ] LA - Discard [ ] [ ]
[ ] MH - Keywords [ ] [ ]
[ ] AD - Discard [ ] [ ]
[ ] AB - Abstract [ ] [ ]
SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume < ( Issue Supplement ) > : Pages
[ ] [ ] AB - Abstract [ ]

```

See? Since each AB section lies within If First brackets, there's no harm in putting both of them into the one template. The only trade-off is that if you carry this sort of thing to extremes with many, many bracketed options you will probably notice your imports running a little more slowly, as there will now be many more permutations for Papyrus to consider before it finds the appropriate combination for any particular incoming reference.

• • •

Here is another situation that I encounter depressingly regularly. Suppose that most of your incoming references do appear as our original sample, with their SO paragraph looking something like:

SO - N Engl J Med 1978;137<4>:231-5

but that there are also some references arranged like this:

SO - N Engl J Med 1978, vol. 137, no. 4, pp. 231-5

Again, we *could* simply design two separate formats, each with a template appropriate to one form or the other. The first would be the one we've been working with so far:

```

SO - Journal Abbreviation Year [ ] Day & Month [ ] ;
Volume < ( Issue Supplement ) > : Pages

```

The second would correspond to the oddball references:

```

SO - Journal Abbreviation Year [ ] Day & Month [ ] ,
vol. Volume < , no. Issue , Supplement > , pp. Pages

```

---

Do you agree that this does indeed match the second kind of reference? Note that the commas and spaces have to make sense in relation to the brackets just as the `|`s did in our earlier discussion.

Hence I have specified:

```
vol. [Volume] < , no. [Issue] , [Supplement] > , pp. [Pages]
```

rather than:

```
vol. [Volume] , < no. [Issue] , [Supplement] > , pp. [Pages]
```

Picture the latter for the case where neither Issue nor Supplement appears, and therefore the bracketed section is effectively absent.

But we could instead make a *single* template that can handle both possibilities. There are several ways we could do this, such as:

```
SO - [Journal Abbreviation] [Year] [ ] [Day & Month] [ ]  
[ ] ; [Volume] < ([Issue] [Supplement]) > : [ ] [ ] , vol .  
[Volume] < , no. [Issue] , [Supplement] > , pp. [ ]  
[Pages]
```

You will have to study this for a minute to confirm that it really does what I claim.

---

**Remember: the more complicated a template becomes, the more careful you must be to imagine that template with one or more of its bracketed parts missing, making sure that what's left still makes sense. Just as a pair of adjacent `|`s is an error, so is an unintended pair of adjacent spaces or commas.**

---

## Variant pieces, Part 2

Here is a common situation that often arises with personal databases. Suppose that your colleague's personal bibliographic database program is able to output its contents in Medline-style. In the MH paragraph are a string of keywords separated by semicolons. Unfortunately, due to the way data were input, or perhaps due to limitations in the original database software, sometimes there will be an extra semicolon at the end of the paragraph:

```
MH - MARSUPIAL; POUCH;
```

Papyrus never likes to import a field that ends with this sort of dangling punctuation. (No self-respecting keyword, for example, would end with a semicolon!) So we would need to modify our template to cover this possibility:

---

[ MH - Keywords ; ] ] ]

As you see, a set of If First brackets does not necessarily have to include a field code. It's okay to just have some punctuation inside there.

• • •

Recall that our template currently discards incoming Language information:

[ LA - Discard ] ] ]

Now suppose that we still have no interest in storing the Language when it is English, but that we *would* like to keep this information for other languages. Consider this:

[ LA - English ] ] ]  
[ LA - Language ] ] ]

Do you understand what I've done here? If the Language of the incoming reference is listed as English, then the first of the two bracketed LAs will gobble up the whole paragraph, and the second LA section will simply think that no Language had appeared. But if the Language is something other than English, then the first LA will shrug and go hungry, leaving the second LA to grab the Language and store it in Papyrus's Language field.

• • •

Sometimes a Medline reference will contain a NO or Notes paragraph:

```
13
UI - 77198273
AU - Smythe AB; Jones CD
TI - Physiology of the koala
LA - English
MH - MARSUPIAL; POUCH; *SLEEP
AD - Institute of Cuddly Creatures, 400 Pitt Street,
    Sydney, NSW, Australia.
AB - This article discusses various important
    aspects of a number of topics concerning no
    small nor insignificant matters pertaining
    to the physiology of certain marsupial beasts.
SO - N Engl J Med 1978;137(4):231-5
NO - Related editorial, page 289
```

Let's store this information in Papyrus's Comments field:

```

Discard |
UI - Discard |
[AU - Author | | ]
TI - Title |
[LA - Discard | | ]
[MH - Keywords | | ]
[AD - Discard | | ]
[AB - Abstract | | ]
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume < ( Issue Supplement ) > : Pages
[ | NO - Comments ]

```

Another paragraph that can sometimes appear is PT or Publication Type:

```

13
UI - 77198273
AU - Smythe AB; Jones CD
TI - Physiology of the koala
PT - Review Article
LA - English
MH - MARSUPIAL; POUCH; *SLEEP
AD - Institute of Cuddly Creatures, 400 Pitt Street,
    Sydney, NSW, Australia.
AB - This article discusses various important
    aspects of a number of topics concerning no
    small nor insignificant matters pertaining
    to the physiology of certain marsupial beasts.
SO - N Engl J Med 1978; 137(4):231-5

```

The Comments field seems like a good place for storing this information as well:

---

```

Discard |
UI - Discard |
[ AU - Author | ]
TI - Title |
[ PT - Comments | ]
[ LA - Discard | ]
[ MH - Keywords | ]
[ AD - Discard | ]
[ AB - Abstract | ]
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume < ( Issue Supplement ) > : Pages
[ ] NO - Comments |

```

Hmm. Now we've told Papyrus to put both the Publication Type and the Notes information into the *same* Papyrus field, Comments. What will happen if one of the incoming references includes *both* of these fields?

Actually, a reasonably nice thing: if an incoming reference includes both fields, they will indeed both end up in the Comments field. Papyrus will first encounter the PT information, which goes into the Comments field. When it subsequently runs into the NO information, Papyrus then adds this to the end of the existing Comments field:

**Comments** || Review Article. Related editorial, page 289

## Repeating pieces

Next complication: **repeating fields**. The fields that most commonly repeat themselves are authors and keywords. For example, here is a different but equally typical form of Medline-style reference:

```

13
UI - 77198273
AU - Smythe AB
AU - Jones CD
TI - Physiology of the koala
LA - English
MH - MARSUPIAL
MH - POUCH
MH - *SLEEP
AD - Institute of Cuddly Creatures, 400 Pitt Street,
    Sydney, NSW, Australia.
AB - This article discusses various important
    aspects of a number of topics concerning no
    small nor insignificant matters pertaining
    to the physiology of certain marsupial beasts.
SO - N Engl J Med 1978;137(4):231-5

```

While our previous sample reference listed all of its authors in one AU paragraph, and all of its keywords in a single MH paragraph, this sample gives each author and keyword its own, tagged paragraph.

To cope with these differences we have to get a little sneaky.

If you can figure this one out before reading further, let me know—we might offer you a job.

Let's do the keywords first. You might be tempted to try something like this:

```

Discard |
UI - Discard |
[AU - Author | ]
TI - Title |
[LA - Discard | ]
[MH - Keywords | ]
[MH - Keywords | ]
[MH - Keywords | ]
[AD - Discard | ]
[AB - Abstract | ]
SO - Journal Abbreviation Year | Day & Month | ;
    Volume < ( Issue Supplement ) > : Pages

```

But if there are more than three MH paragraphs this won't work. In any case, such a method is quite inelegant.

Instead, we leave the Article template alone:

Discard [ ]  
 UI - Discard [ ]  
 [ ] AU - Author [ ] [ ]  
 TI - Title [ ]  
 [ ] LA - Discard [ ] [ ]  
 [ ] MH - Keywords [ ] [ ]  
 [ ] AD - Discard [ ] [ ]  
 [ ] AB - Abstract [ ] [ ]  
 SO - Journal Abbreviation Year [ ] Day & Month [ ] ;  
 Volume < ( Issue Supplement ) > : Pages

But in the **Details** section we specify:

Keywords      Punctuation between  
    keywords: [ ] [ ]

Get it?

Use the [ ] button to insert the paragraph break symbol here. And note that there's a space after the hyphen.

• • •

We handle the authors in basically the same way, though in the **Authors** section of the format:

**MED: Authors**

Each name      Special cases  
 Multiple names      et al.

Anthony SB  
 AU - Stanton ECU  
 Sturgeon TH  
 AU - Zelazny R  
 AU - Williams WJ

**Two Authors**  
 Punctuation between the two names: [ ] AU - [ ]

**Three or more Authors**  
 Punctuation between first two names: [ ] AU - [ ]  
 Punctuation between final two names: [ ] AU - [ ]

Cancel      OK

• • •

That takes care of authors and keywords. Once in a while, though, some other field may show up repeatedly. For example, some Medline-style data sources include multiple PT, Publication Type, paragraphs. Again we *could* deal with these like this:

```
Discard |
UI - Discard |
[AU - Author | ]
TI - Title |
[PT - Comments | ]
[PT - Comments | ]
[PT - Comments | ]
[LA - Discard | ]
[MH - Keywords | ]
[AD - Discard | ]
[AB - Abstract | ]
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume < ( Issue Supplement ) > : Pages
```

but once again we'd have to guess the maximum possible number of repetitions. Here is where we use a variant of If First brackets, Multiple brackets:

```
Discard |
UI - Discard |
[AU - Author | ]
TI - Title |
[[PT - Comments | ]]
[LA - Discard | ]
[MH - Keywords | ]
[AD - Discard | ]
[AB - Abstract | ]
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume < ( Issue Supplement ) > : Pages
```

While If First brackets mean “this bit may or may not appear,” these Multiple brackets mean “this bit may or may not appear, or it may appear repeatedly.”

---

If an incoming reference includes more than one PT paragraph, then *all* of these will be stored in the Papyrus Comments field.

## Plug-in filters

I've already introduced you to **plug-in filters**. When your import format specifies one or more plug-in filters, then each incoming reference will be processed by these filters prior to Papyrus trying to match it to your format's templates.

One of the most useful filters is **Alphabetize Tags**. If your import source does not always present its tagged paragraphs in a consistent order, then you can use **Alphabetize Tags** to guarantee a predictable order. You will then need to set up your templates accordingly.

For example, if we tell Papyrus to use the **Alphabetize Tags** plug-in with our MED format, then our template for journal articles must be changed to:

```
Discard |
[ AB - Abstract | ]
[ AD - Discard | ]
[ AU - Author | ]
[ LA - Discard | ]
[ MH - Keywords | ]
TI - Title |
SO - Journal Abbreviation Year [ Day & Month ] ;
Volume < ( Issue Supplement ) > : Pages |
UI - Discard
```

• • •

Another filter that some of you will find very helpful is **Outdent Percents**. Bibliographic sources from the Unix world were often created using styles known as **Refer** or **Bib**. These styles use tags such as %A and %T rather than AU and TI.

**Refer** is also the standard export format used by **EndNote**.

The **Outdent Percents** filter ensures that any line starting with a percent sign will begin at the left margin, while all other lines will be indented exactly one space. This will allow Papyrus to use its usual indentation approach to determine the boundaries of each incoming paragraph.

• • •

---

A complete list of available plug-in filters appears in the REFERENCE section's *Plug-in Filters* chapter. New filters also appear from time to time on our Web site.

If you are faced with an import problem that you believe needs a new plug-in filter, please contact our Technical Support department.

## Multiple reference types

I have confined my examples in this chapter to **journal articles**. As should be obvious, other reference types would be dealt with analogously. However, don't get carried away. If some reference types never appear in your source file, then you should *not* provide a template for those types.

For each incoming reference, Papyrus will try to apply each defined template until it finds a match. It always tries the templates of a format in the order shown in the Import window's pop-up menu:

- ✓ Article in journal
- Chapter in book
- Book/Monograph
- Dissertation/Thesis
- Patent
- Map
- Quoted citation
- Internet source
- Usenet post
- Newspaper article
- Issue of journal
- Presentation at meeting
- Archival materials
- Slide/Visual
- Notecard
- Other reference

Templates for any user-defined reference types will be tried prior to **Notecard** and **Other reference**.

So if your file contains, for example, mainly Articles, plus some miscellaneous references that you wish to classify as Others, there will be three drawbacks if you unnecessarily define templates for any of the remaining reference types. First, you will waste a lot of your time defining them. Second, Papyrus will waste a lot of its (and your) time trying to apply them to those references that are supposed to be Others. Third, should Papyrus accidentally succeed, you may end up with some awfully strange-looking Dissertations and Patents.

---

## Data sources from Hell

Here are just the SO paragraphs from a single actual CD-ROM product:

SO: Plant-Physiol. Rockville, Md. : American Soc. of Plant Physiologists. May 1989. v. 90 (1) p. 290-295.

SO: Proc-Natl-Acad-Sci-U-S-A. Washington, D.C. : The Academy. Feb 1989. v. 86 (4) p. 1244-1248. ill.

SO: Inf-Rep-M-X-Marit-For-Rec-Cent-Can-For-Serv. Fredericton : The Centre. 1988. (169) 14 p. ill., maps.

SO: For-Chron. Ottawa, Can., Canadian Institute of Forestry. Feb 1982. v. 58 (1) p. 31-34.

SO: Res-Rep-Off-Rural-Dev-Soil-Sci-Fert-Plant-Prot-Mycol- Korea-Repub-Min-Agric-Fish. Suwon, The Office. Nov 1981. v. 23 p. 75-79.

Okay, let's take this one step at a time. Looking at just the first of these, we can create a straightforward first draft template:

```
SO:  Journal Abbreviation .  Discard .  Day & Month  
 Year . v.  Volume (  Issue ) p.  Pages .
```

I should point out that Papyrus is reasonably smart about journal abbreviations, and will automatically convert **Plant-Physiol** into **Plant. Physiol.** (Yes, well I did say *reasonably* smart.)

Note that I've used a  Discard code because we have no reason to retain the city of publication and publishing society for each journal. But this creates a problem. We want the field codes to match the following bits of data:

```
 Journal Abbreviation Plant-Physiol  
 Discard Rockville, Md. : American Soc. of Plant Physiologists
```

But Papyrus only knows that the  Journal Abbreviation is supposed to match something that ends with a period and space, and that the  Discard will then match the next thing that ends with period and space. So there is nothing to prevent this match:

```
 Journal Abbreviation Plant-Physiol. Rockville, Md. : American Soc  
 Discard of Plant Physiologists
```

Not pretty! So we will make our template a bit more complex:

---

```
S0: Journal Abbreviation, Discard ; Discard,
Day & Month Year, v, Volume (Issue) p. Pages,
```

This will force the correct matches:

```
Journal Abbreviation Plant-Physiol
Discard Rockville, Md.
Discard American Soc. of Plant Physiologists
```

This template will still work for the second example, except that there is now something—“ill.”—tacked onto the end. Only a slight modification is required:

```
S0: Journal Abbreviation, Discard ; Discard,
Day & Month Year, v, Volume (Issue) p. Pages,
[ Discard ]
```

The third sample lacks both the Day/Month and the Volume. So:

```
S0: Journal Abbreviation, Discard ; Discard,
[ Day & Month ] Year, [ v, Volume ] (Issue)
p. Pages, [ Discard ]
```

Even with these changes, this will still work for the first two references.

The third sample also seems to include the total number of pages—“14 p.” rather than a page-range. This is probably because the reference is not really an article from a journal, but rather a small report published as a pamphlet in a series. Still, the source file actually does categorize this reference as an “Article.” If we are to accept this categorization and bring in the reference as an Article (a questionable decision, actually), then let’s save the “14 p.” in the Papyrus Also Print field:

```
S0: Journal Abbreviation, Discard ; Discard,
[ Day & Month ] Year, [ v, Volume ] (Issue)
[ p. Pages ] [ Also Print ] [ Discard ]
```

Thus after Papyrus deals with the parenthesized Issue it will try to match something beginning “ p. ” This will still work for the first two examples, where the page numbers will then be matched by the `Pages`, correctly leaving nothing for the following `Also Print`. In the third reference Papyrus will not find “ p. ” immediately following the parentheses, so it will go on to take everything up to the next period (“14 p.”) and match it to the `Also Print`. Got it?

---

The fourth example presents quite a challenge to our composure. We have lost the colon between city and publisher—now there is a comma instead! Well, we could try something like this:

```
S0: [Journal Abbreviation] . [Discard] [ : ] [ , ]
[Discard] . [ Day & Month ] [Year] . [ v. Volume
] (Issue) [ p. Pages ] [ Also Print ] . [
Discard ]
```

But no, that would allow these matches for the *first* sample:

```
[Journal Abbreviation] Plant-Physiol. Rockville, Md. : American Soc
[Discard] of Plant
[Discard] Physiologists
```

because we have now made the colon optional. No, we need to take a larger perspective:

```
S0: [ [Journal Abbreviation] . [Discard] : [Discard] ]
[ [Journal Abbreviation] . [Discard] , [Discard] ] .
[ Day & Month ] [Year] . [ v. Volume ] (Issue)
[ p. Pages ] [ Also Print ] . [ Discard ]
```

A significant amount of cogitation should convince you that this template will correctly handle all of the first four examples.

The fifth example is similar to the fourth, except for omitting its Issue. So:

```
S0: [ [Journal Abbreviation] . [Discard] : [Discard] ]
[ [Journal Abbreviation] . [Discard] , [Discard] ] .
[ Day & Month ] [Year] . [ v. Volume ] [ (Issue
) ] [ p. Pages ] [ Also Print ] . [ Discard ]
```

That takes care of references resembling any of our five samples. But, as you might guess, this particular data source actually yet further variants! So if you were trying to develop the perfect import format for this source, you would create the best draft of the format you could, and then try using it to import a large data file. Each time you found a batch of references rejected, or matched very strangely, you would go back and modify the format to accommodate that batch. Then you would have to double check that your modification did not cause problems with the formerly successful references. For particularly nasty data sources, this iterative process can go on for days.

---

There is one shortcut. Once your format is successfully bringing in a large percentage of the references, you can give up on the rest and bring them all in as Others. The field codes for Others are rather more limited than those for Articles, so our template for the SO paragraph could be:

```
SO: Rest of reference (may include Year)
```

This will not produce beautiful results in Papyrus, and if you later need to output the references as a real bibliography they will come out rather oddly. But at least you'll be getting the information into your personal database.

You can also try complaining to the providers of these nightmare databases. If *all* of you do so, they may eventually mend their ways.

## See Also...

If you are going to be designing your own import formats, consider this chapter to be just an introduction to doing so. You will learn much from working on your own formats and paying close attention to the **debugging mode display**.

And as I keep mentioning, feel free to contact us for assistance.

---

## See also:

### CONCEPTS

*Reference Types and Fields*

### REFERENCE

*Reference Types and Their Fields*

*Formats Window*

*Import*

*Plug-in Filters*

---

## Working with the Web

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Internet Config .....	W272
URLs in text .....	W274
Reference URLs .....	W274
Journal URLs .....	W276
URLs in HTML reference lists .....	W277
See Also.....	W278

---

## Introduction

In addition to references to printed material—such as Articles, Books, Chapters, *etc.*—Papyrus includes built-in reference types for both **Internet** and **Usenet** sources.

You can also include Internet **URLs** (Unique Resource Locators) within *any* of your references. Papyrus can then link to your Web browser, e-mail client, newsreader or other Internet-related application when you wish to follow those links.

When you have Papyrus create a reference list as an **HTML document**, Papyrus will incorporate such URLs as active links.

## References to online sources

Papyrus comes with two reference types, one for Web pages, ftp sites, *etc.*, and the other for newsgroup postings on Usenet.

### Internet source

The fields available for an **Internet source** reference include these:

#### Authors

For some sources, such as many Web pages, this will be an organization rather than an individual.

#### Year

It's up to you whether you indicate the year the source was created, the year it was last updated, or the year you accessed it. In subsequent fields we'll get more specific.

#### Author e-mail

If relevant, here is where you can provide the author's e-mail address.

#### Title

For a Web site this is usually obvious. For an ftp site or some other sources you might wish to enter a brief description—such as ftp site of Research Software Design.

#### URL

This is really the heart of the reference, as it provides the reader a way to look up the source. You should provide a **complete URL**, such as <http://www.rsd.com/> rather than just [www.rsd.com](http://www.rsd.com).

---

### **Date posted**

This is where you should indicate when the source was posted to the Web, ftp site, or wherever. Including this date will help readers keep track of updates to the source.

### **Date accessed**

And this is where you can indicate the date that you last reviewed the source. Given the dynamic nature of the Internet, this is generally a good thing to include in your citations.

Other typical Papyrus fields are also part of the Internet source reference type, including Also Print, Abstract, Comments, Keywords, Language and so on.

### **Usenet post**

Newsgroups work a little differently than the rest of the Internet, so we have provided a separate reference type for **Usenet posts**:

#### **Authors**

The human name of the author, if it was included in the post. Otherwise you'll have to use your judgement as to the best name, screen name, or other identification to use here.

#### **Year**

Nothing tricky here, as all Usenet posts are clearly dated.

#### **Author e-mail**

If available, this provides readers with a way to contact the poster.

#### **Subject**

The Subject line of the post.

#### **Newsgroup**

It is essential for you to provide the name of the newsgroup to which the post was made.

#### **Date posted**

This is often essential for identifying the correct post.

#### **Message-id**

All posts include, somewhere in their headers, an official **message-id**. This unique identifier will allow your reader to distinguish among several posts by the same person to the same newsgroup on the same date.

#### **Archive URL**

If the post is available on the Web from a Usenet **archive**, such as Deja News or AltaVista, you can provide the URL for that archive's copy of the post, giving

---

the reader a quick and reliable way of locating the post long after it has disappeared from local newsgroups.

Again, other typical Papyrus fields, such as Abstract and Keywords, are also available for Usenet post references.

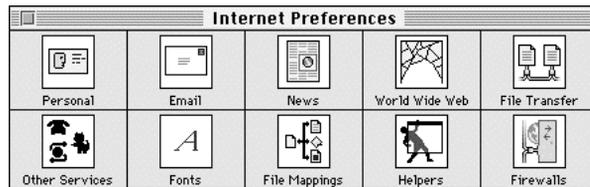
## Internet Config

When Papyrus works with your Web browser or other Internet-related application, it uses a system extension named **Internet Config**. This is the creation of an international group of programmers, and is available free of charge.

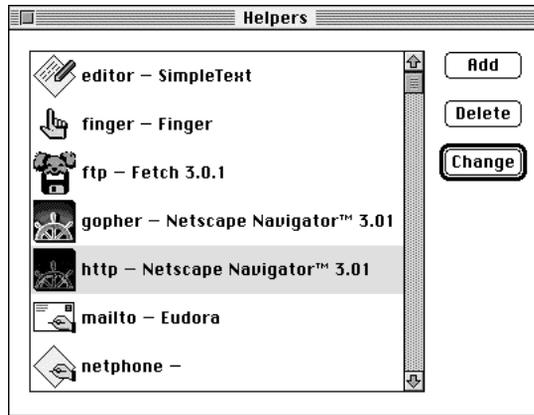
Recent versions of the Mac OS come pre-equipped with Internet Config, as do an increasing number of commercial applications. Most likely you already have a copy of Internet Config on your computer. If not, you can download it from the Web, <<http://www.share.com/peterlewis/ic/index.html>>.

Internet Config provides a central location for indicating your Web browser, ftp client, e-mail client, and other Internet-related applications. When you click a URL in Papyrus, it is Internet Config that sends that URL to the appropriate application.

When you launch the Internet Config application, here is approximately what you'll see (depending on the version of Internet Config you're using):



Click the **Helpers** button. You can now indicate which application should be used for each type of URL. For example, for a Web URL ("http:") you should specify your usual Web browser:

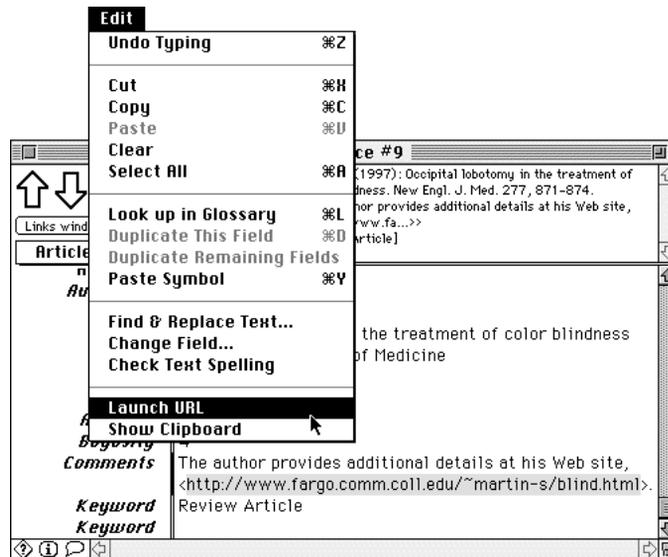


Now when you tell Papyrus to follow a “http:” URL to a Web site, it will automatically instruct your Web browser to display that site.

---

## URLs in text

If you select a URL that appears anywhere in Papyrus, you can choose **Launch URL** from the **Edit** menu:

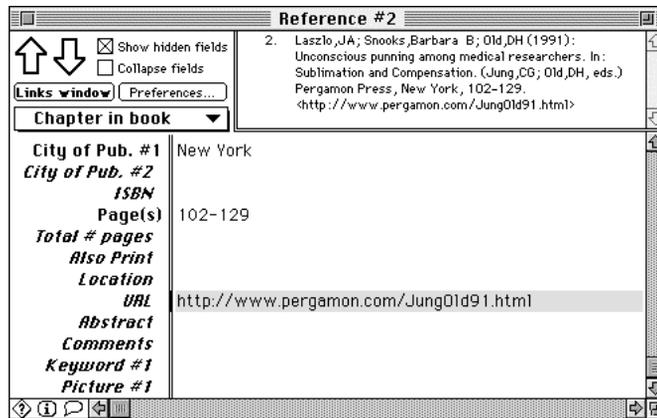


Papyrus will instruct your Web browser (or other appropriate Internet-related application) to access the URL.

As a shortcut, you can simply **⌘-double-click** anywhere in the URL to launch it.

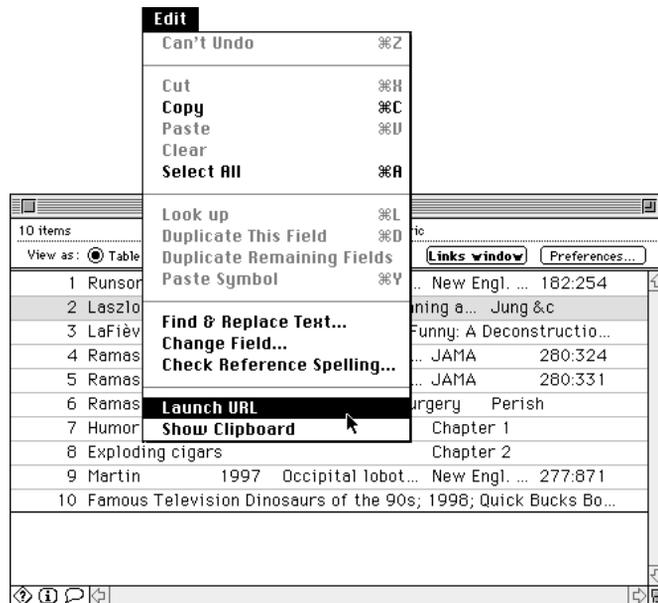
## Reference URLs

One of the hidden fields available to all of Papyrus's reference types is **URL**:



Use this field to store a relevant link for the reference, such as the entry for an Article in a Web-based database such as PubMed, or an online catalog listing for a Book.

Once you have provided a URL for a reference, you can select that reference in any window and choose **Launch URL** from the **Edit** menu to have your Web browser bring up that URL for you.



---

## Journal URLs

More and more journals these days have their own Web sites. So in Papyrus, journals also include their own URL field:

**Edit Journal**

Full Journal Name: New England Journal of Medicine

Standard Abbrev.: New Engl. J. Med.

Call Number:  ISSN:

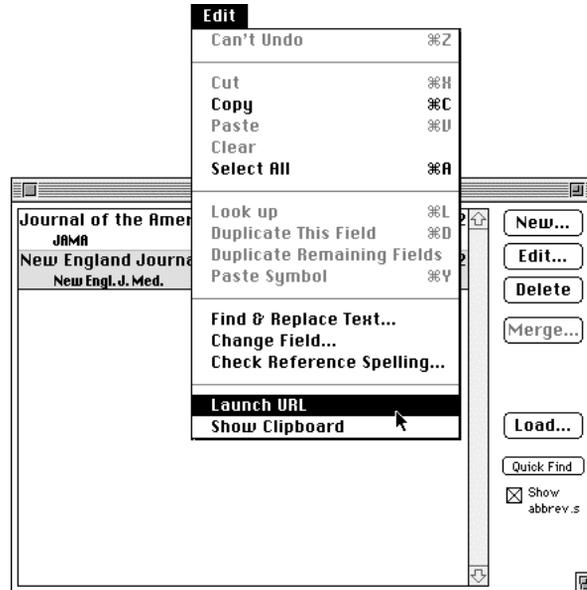
URL: http://www.nejm.com/

Comments:

Routinely cite:  
 Issue  Day/Month  Series

Cancel Change

Once you have provided a journal's URL, you can launch that URL from the Journals window:



---

Moreover, when you choose **Launch URL** for an **Article reference**, if that reference does not include anything in its own URL field, then Papyrus will use the URL for the journal in which the Article appeared.

## URLs in HTML reference lists

As you will recall, you can have Papyrus output a list of references as an **HTML document**, ready to be posted to your own Web site.

For any reference that includes a URL in its URL field (or, for Articles, in its **journal's** URL field), Papyrus will automatically make that reference into a link to the URL:

```
<HTML><HEAD><TITLE>Reference List</TITLE></HEAD>
<BODY>
<FONT FACE="Helvetica">
<p ALIGN="center">
<b>References</b></p>
<p ALIGN="justify">
<a HREF="http://www.nejm.com/">1. Runson SK, Rogerstein BT. The judicious use
of nitrous oxide in the treatment of Grave's disease. New Engl J Med 1990;182:254-
67.</a></p>
<p ALIGN="justify">
<a HREF="http://www.pergamon.com/JungOld91.html">2. Laszlo JA, Snooks BB,
Old DH. Unconscious punning among medical researchers. In: Jung CG, Old DH, edi-
tors. Sublimation and Compensation. New York: Pergamon Press; 1991:102-29.</a></
p>
<p ALIGN="justify">
3. LaFièvre H. Why Nothing is Funny: A Deconstructionist Analysis. 2nd ed.
Cambridge: Harvard University Press; 1992.</p>
</FACE>
</BODY>
</HTML></FONT>
```

### References

1. Runson SK, Rogerstein BT. The judicious use of nitrous oxide in the treatment of Grave's disease. New Engl J Med 1990;182:254-67.
2. Laszlo JA, Snooks BB, Old DH. Unconscious punning among medical researchers. In: Jung CG, Old DH, editors. Sublimation and Compensation. New York: Pergamon Press; 1991:102-29.
3. LaFièvre H. Why Nothing is Funny: A Deconstructionist Analysis. 2nd ed. Cambridge: Harvard University Press; 1992.

---

## See Also...

About the only thing that this version of Papyrus *doesn't* do is act as its own Web server for your Papyrus database. We do have plans along these lines, but first we'd like to receive suggestions and requests from those of you who actually use a Macintosh for a Web server. So talk to us!

---

## See also:

### REFERENCE

*Reference Entry Window*

*Journals Window*

*Database Settings*

*Print/Export*

---

CHAPTER 25

## Pictures and Graphics

Introduction .....	W280
Entering pictures .....	W280
Displaying pictures .....	W281
See Also.....	W282

---

## Introduction

Each Papyrus reference includes a set of fields for holding **pictures** or other graphics. Possible uses for these fields include storing illustrations, charts, or tables from the corresponding reference.

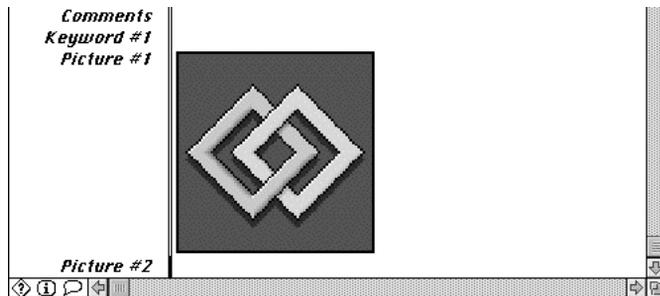
By using this feature with references of type **Notecard** or **Slide/Visual**, you can even employ Papyrus as your primary **graphics database**.

## Entering pictures

Unless you have set different preferences, the Picture fields default to **hidden**. So open a new Reference Entry window and click the Show hidden fields checkbox. A new field will appear:



You can **paste** or **drag** any picture or graphic from any other application to this field:



As with Keywords, each time you insert a Picture a new Picture field opens up, ready for another picture.

If you insert a picture that contains multiple representations, such as **PICT** plus **EPS**, or maybe a **QuickTime movie**, Papyrus will *display* only the PICT form but will *store all* representations.

This means that you can store a complex graphic from, say, Photoshop in Papyrus. Even though only the PICT representation will appear while you're in Papyrus, when you later copy or drag the Papyrus **Picture** field to another application, *all* of the original data will still be present.



---

If you tell Papyrus to export references to an **HTML** file, however, Papyrus will simply include a generic placeholder for each picture:

```
<IMG SRC="image_file">
```

You can subsequently create your Web-appropriate image files and correct these placeholders accordingly.

## See Also...

We're sure that some of you will think of innovative uses for this Papyrus feature. Let us know what you come up with!

---

## See also:

### REFERENCE

*Reference Entry Window*  
*Print/Export*  
*Numbering & Layout*

## Spellchecking

Introduction .....	W284
Spellchecking text .....	W284
Spellchecking while saving a reference .....	W285
Spellchecking a batch of references.....	W285
See Also.....	W286

---

## Introduction

Papyrus works very nicely with any spellchecker that uses the standard **Word Services** interface for communicating with other applications. The most well-known and well-supported such spellchecker is **Spellswell Plus**, available at a very reasonable price from **Working Software**. Another spellchecker that works well with Papyrus is **Excalibur**, which is free.

For information on Word Services, see <http://www.wordservices.org/>.

Spellswell Plus can be found at Working Software's site, <http://www.working.com/>.

Excalibur can be downloaded from <http://www.eg.bucknell.edu/~excalibr/excalibur.html>.

Papyrus can spellcheck any piece of text you enter. It can also check the spelling of one or more entire references, skipping over fields such as Authors.

## Spellchecking text

Any time you select some text in Papyrus, the **Edit** menu includes a **Check Text Spelling** item:



When you select this item, Papyrus begins by launching your spellchecker if it is not already running.

If this is the first time you've tried this sort of thing then Papyrus will ask you to locate your spellchecker.

If the spellchecker has a problem with what you've typed, it will ask you to correct the problem. After you've done so the spellchecker will return to the background and you will find yourself back in Papyrus.

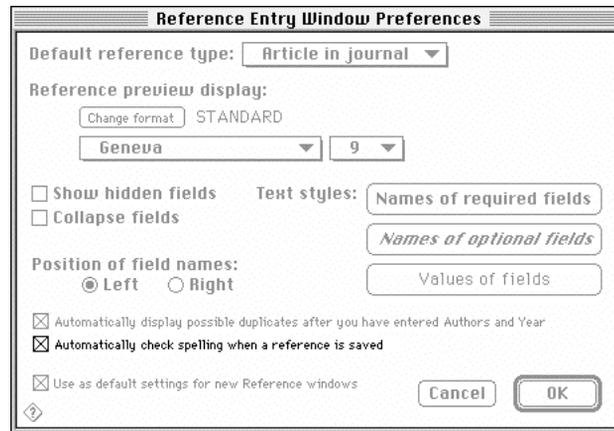
If you did instruct the spellchecker to alter your original text, you will find that the correction has now been made in Papyrus.

---

## Spellchecking while saving a reference

You can tell Papyrus to automatically run the spellchecker whenever you save a new or changed reference.

In a Reference Entry window click the Preferences button:



When you check **Automatically check spelling when a reference is saved**, any time you save a new or changed reference in a Reference Entry window Papyrus will first submit the reference to your spellchecker.

Only certain fields will be spellchecked. By default these include the various **Title** fields (title of article, title of book, title of series, *etc.*), **Abstract** and **Comments**. You can pick and choose which fields you want spellchecked via **Database Settings...** from the **File** menu.

## Spellchecking a batch of references

If no text is currently selected, then the **Check Text Spelling** command becomes **Check Reference Spelling...**:



---

As with **Check Text Spelling**, Papyrus begins by launching your spellchecker if it is not already running. Then Papyrus asks you which references to spellcheck:



When you click the **Check** button Papyrus will then submit each reference in turn to your spellchecker. Any corrections will automatically be saved, and Papyrus will then proceed to the next reference.

Your **Database Settings** (from the **File** menu) control which fields are to be spellchecked. By default these are the various **Title** fields (title of article, title of book, title of series, *etc.*), **Abstract** and **Comments**.

## See Also...

If you try various spellcheckers you will find that some do a better job than others of correctly implementing the Word Services interface—and therefore some do a better job than others in working with Papyrus.

Feel free to report your findings to us. In some cases we might be able to work with the maker of the spellchecker to improve the situation.

---

## See also:

### REFERENCE

*Reference Entry Window*  
*Database Settings*  
*Check Spelling*

## Fields & Reference Types

Introduction .....	W288
Field definitions .....	W288
Reference Type-specific Field definitions .....	W290
Making a new Field .....	W292
Making a new Reference Type .....	W295
Updating your Formats .....	W299
See Also .....	W301

---

## Introduction

You have considerable control over the **fields** and **reference types** of your database. You can change their names and properties, and create new fields and reference types to meet your needs.

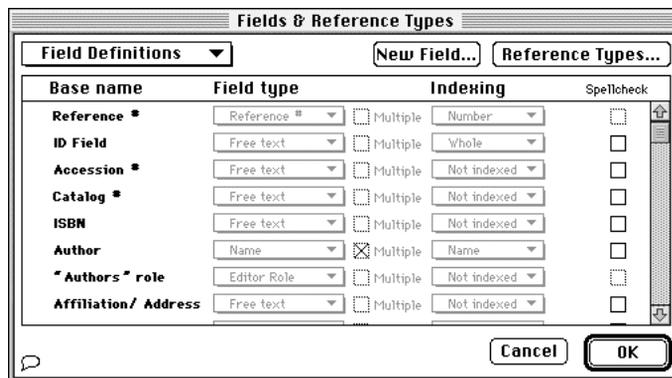
As a general rule you should not create a new field or a new reference type if an existing one would serve. For example, if you create a new field to hold information that could just have well been stored in the predefined Comments field, then when you later perform a search you will have to remember to search the new field rather than Comments. And if you someday give some or all of your references to another Papyrus user, then that person will have to learn what customized fields and reference types you have used, as they will now be added to his or her database as well.

However, there are certainly situations where your particular needs require you to add to Papyrus's predefined fields and reference types. This chapter explains how to accomplish this.

There are also aspects of *existing* fields that you might wish to change. These include **indexing** and **spellchecking**, as well as the **order** in which fields appear in the Reference Entry window and whether they are to be **Required**, **Optional** or **Hidden**.

## Field definitions

From the **File** menu choose **Database Settings....** In the resulting dialog click the **Fields & Reference Types** button. This dialog will appear:



The dialog shows us all of the fields currently defined in your Papyrus database. For each field five properties are shown:

### Base name

The generic name for the field. The field might take on different names for specific reference types—for example, **Author** becomes **Inventor** in a Patent reference—but the **base name** is the one that will appear in places such as the Find dialog.

### Field type

Each field has a **field type**. These include Name, Number, Free text, Title, Year, *etc.* A complete list of field types appears in the REFERENCE section's chapter *Reference Entry Window*.

### Multiple

Fields such as Author are **multiple** fields. Each time you enter an author, a new Author field opens up, ready for the next author. Some other multiple fields are Editor, Publisher, and Keyword.

### Indexing

As explained in the CONCEPTS *Indexes* chapter, Papyrus uses **indexes** to speed up searching operations. When you search for references with a given keyword, for example, Papyrus looks them up in its keyword index rather than searching through the entire database. Similarly, when you are hunting for references with a particular word appearing in their Abstracts, Papyrus just looks up that work in the abstract index.

Quite a few fields are not indexed at all. How often are you going to search for all references whose Volume is 251, for example? Or all references starting on Page 73?

Some field types have special ways of being indexed. These include **Name** indexing for authors and editors, **Year** indexing, and **Number** indexing.

Text-containing fields such as Title, Publisher, and Comments can be indexed in either of two ways. **Whole** indexing stores the **entire field** as a unit. This makes sense for fields where you will enter no more than a short phrase, and where you're unlikely to ever want to search on individual words from that phrase. Some whole-indexed fields include Publisher and City. **Piece** indexing treats **each word** of the field as a separate item. This is appropriate for fields such as Title or Abstract.

Piece-indexed fields include an additional bit of information:

**Abstract**             Multiple                 

The number represents the **threshold** for indexing words from this field. In this case, the 2 means that for the Abstract field Papyrus will not bother index-

---

ing words of only one or two letters. As you can imagine, omitting words such as a, an, and or from the index will save a lot of storage space.

## Spellcheck

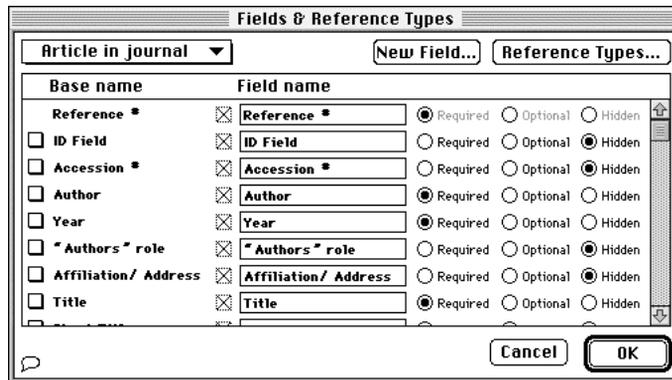
As I explained in the previous chapter, Papyrus will spellcheck only certain fields when you ask it to spellcheck a reference. Here is where you specify those fields.

As you can see, for these **existing fields** the only things you can change are the indexing threshold and spellcheck. The remaining properties are permanently fixed when you create a new field.

The fields shown here are the ones **built into** Papyrus. For **non-built-in** fields you would also be able to change the **indexing** method.

## Reference Type-specific Field definitions

In the **Fields & Reference Types** dialog change the pop-up menu from **Field Definitions** to **Article in journal**:



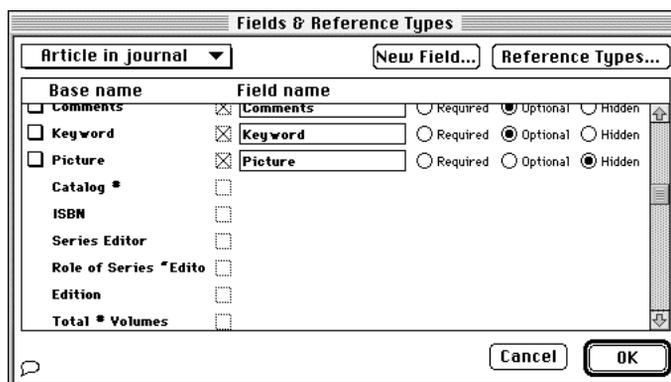
Although the **Base name** for each of Papyrus's built-in fields cannot be changed, you *can* change the corresponding **Field name** that appears for each particular reference type. Although usually these two names will be the same, here are some examples of the use of different names:

- |   |   |                                |                                |   |
|---|---|--------------------------------|--------------------------------|---|
| <input type="checkbox"/> <b>Supercollection Title</b> | <input checked="" type="checkbox"/> <b>Journal Series</b> | <input type="radio"/> Required | <input type="radio"/> Optional | <input checked="" type="radio"/> Hidden |
| <input type="checkbox"/> <b>Collection Title</b>      | <input checked="" type="checkbox"/> <b>Issue Title</b>    | <input type="radio"/> Required | <input type="radio"/> Optional | <input checked="" type="radio"/> Hidden |
| <input type="checkbox"/> <b>Editor</b>                | <input checked="" type="checkbox"/> <b>Issue Editor</b>   | <input type="radio"/> Required | <input type="radio"/> Optional | <input checked="" type="radio"/> Hidden |

---

For each reference type a field is either **Required**, **Optional**, or **Hidden**. When you save a reference, if any Required field is empty then Papyrus considers the reference to be **incomplete**. Fields marked Hidden only appear in the Reference Entry window when the Show hidden fields box is checked. Optional fields always appear, but Papyrus will not be concerned if you leave them blank.

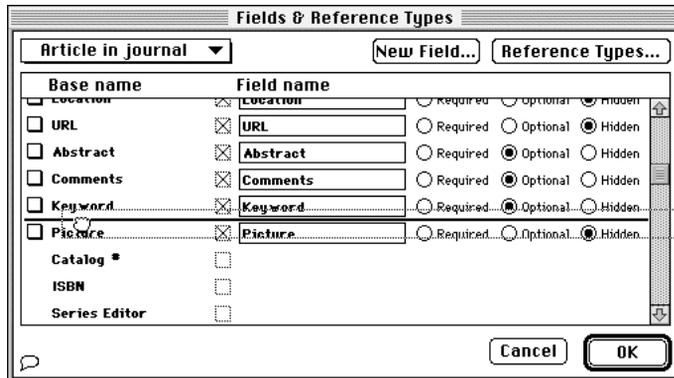
The checkbox here to the left of the field name indicates that this field is relevant to this reference type. If you scroll down to the bottom of the dialog you will find the fields that do not apply to journal articles:



Because this is a built-in reference type and these are all built-in fields you cannot check or uncheck any of these boxes. But you will be able to do so for **new** fields or reference types, as you'll see later in this chapter.

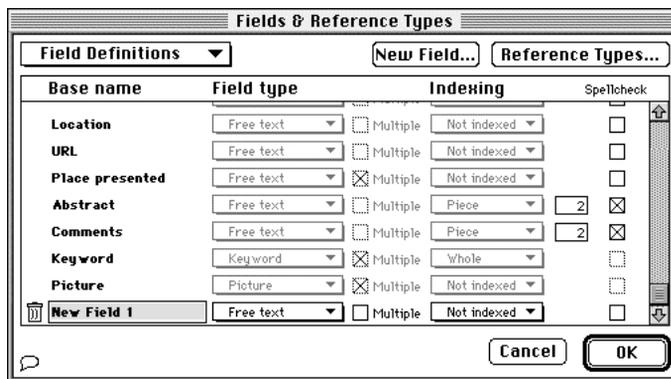
That box to the left of the base names is a **handle** you can use to **drag** a field to a different position in the list. This is how you rearrange the order in which fields will appear in the Reference Entry window.

For example, if you would prefer that Abstract appear *after* the Keywords, you would click the handle for Abstract and drag the field to the new position:



## Making a new Field

Click the **New Field...** button. The dialog returns to the **Field Definitions** view, now with a new field at the bottom of the list:



You can now give your new field a base name and set all of its properties. But note well:

---

**Once you click the OK button, the Field type and Multiple settings become permanent.**

---

---

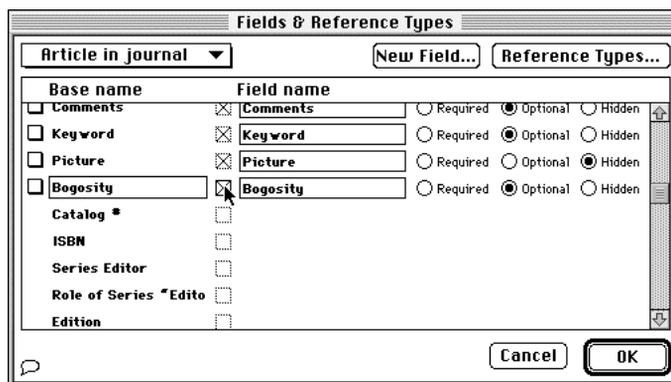
If you change your mind and decide to forget about this new field, click the little **trashcan icon**. Once you have clicked **OK**, though, this icon will disappear and the field will become a permanent part of your Papyrus database.

I'm going to use our new field to store a number from 1 to 5, indicating how reliable I consider the results reported in a reference. 1 will mean "*extremely convincing*", while 5 will stand for "*author must be closely related to the publisher.*" I will tell Papyrus to **index** this field so that I can use it as a fast search criterion:

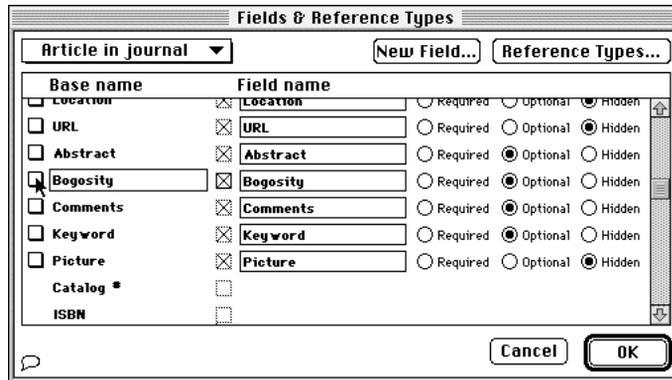


Okay, we have now defined a new field. But we still need to attach it to each relevant reference type.

Start by using the pop-up menu to switch to **Article in journal**. You'll find our new field at the very bottom of the list of unused fields. Click its **checkbox** and it will spring up to the end of the type-applicable fields:



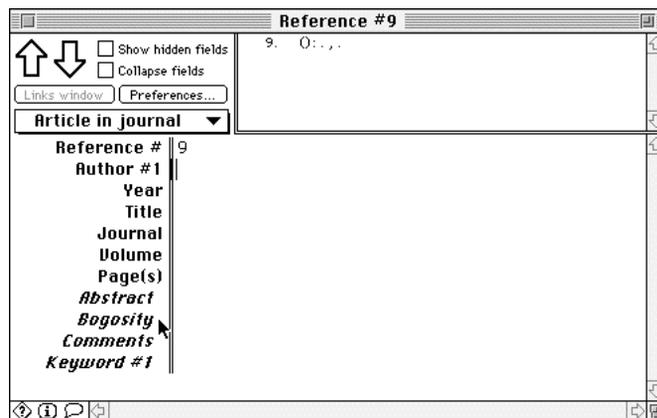
If we desired, we could now change the name of this field that will appear when it is used in an Article. We could also change the field to Required or Hidden when used in an Article. I'm not going to change either of those things, but I will drag the field (via its **handle**, remember?) up to a position between Abstract and Comments:



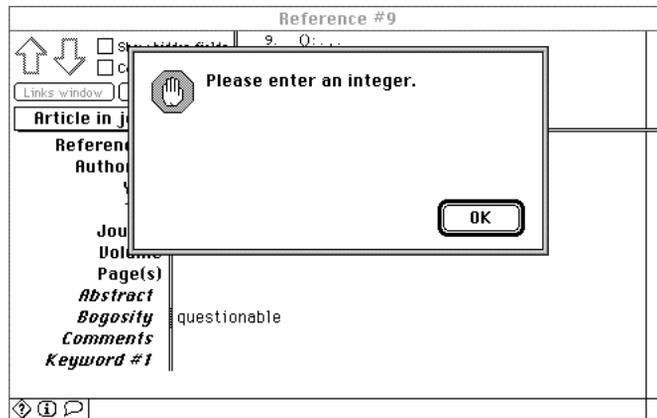
So much for Articles. If we wished to add our new field to other reference types we would use the pop-up menu to select each of those types in turn, and then repeat the steps we followed for Articles.

For now, though, click the **OK** button to save our changes. Then click **Done** in the **Database Settings** dialog.

Next let's see if this worked. Open a new Reference Entry window:



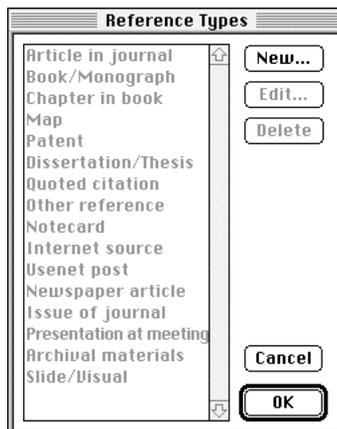
Yes, indeed, there's our new field, right where we intended it. Now let's confirm that it is indeed a Number type of field. I'll try entering something other than a number and see what happens:



Looks good!

## Making a new Reference Type

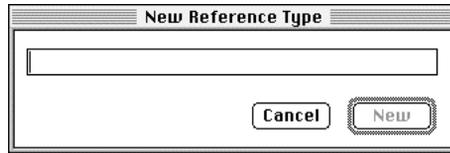
In the **Fields & Reference Types** dialog click the **Reference Types...** button. This dialog will appear:



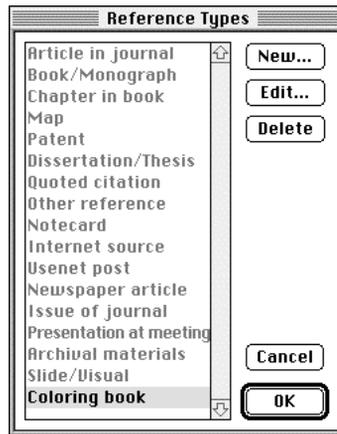
You cannot edit or delete any of the built-in reference types, hence they are all grayed-out.

---

Let's create a new reference type. Click the **New...** button, resulting in the following dialog:

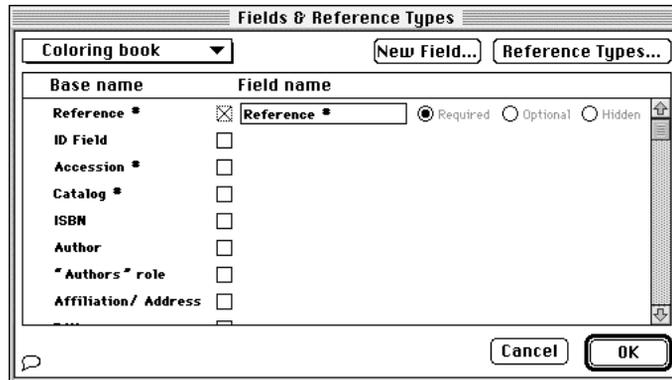


Here we type the name for our new reference type, and then click the New button. Our new type will now appear on the list:

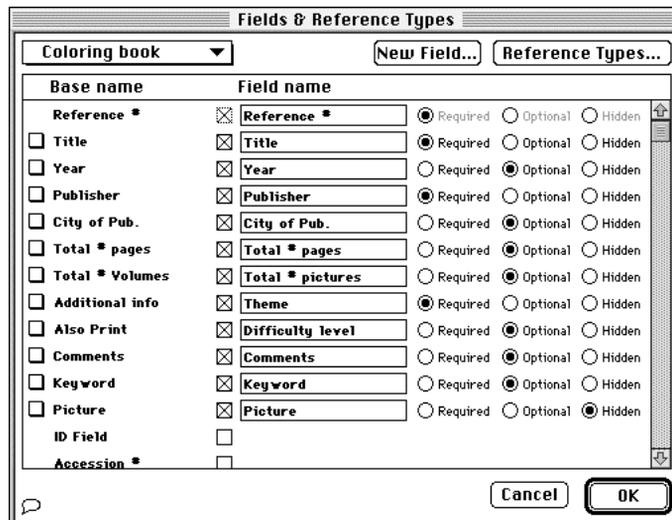


As with new fields, if you decide to delete this new reference type you must do so before dismissing the Fields & Reference Types dialog. Once you've dismissed the main dialog, this new reference type becomes a permanent part of your Papyrus database.

Click **OK**. Papyrus will now display the field list for our new reference type:



Reference # is always the first field for all reference types. Now we must click the checkbox of each additional field that should be included for our type. Then we can arrange these fields in whatever order we wish, change the field names, *etc.*



Now click the **OK** button, and then dismiss the **Database Settings** dialog.

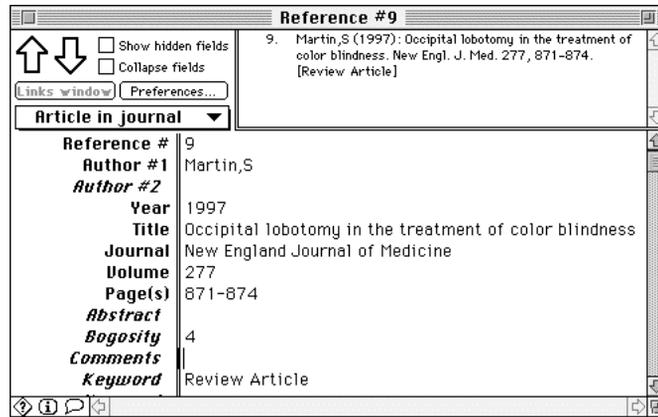


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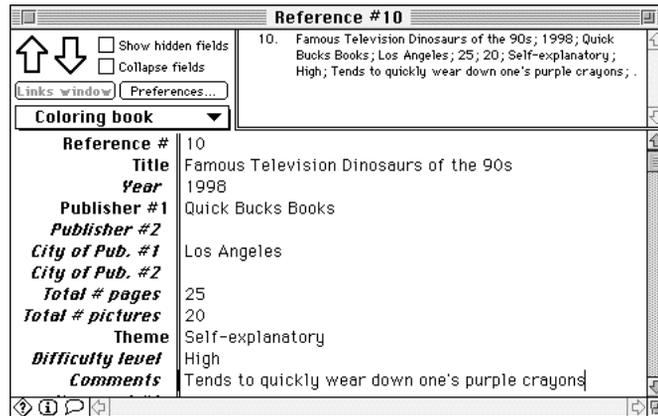
## Updating your Formats

After you create a new field or reference type, you will notice some suboptimal side-effects in the Reference Entry window.

New fields don't show up in the preview display:

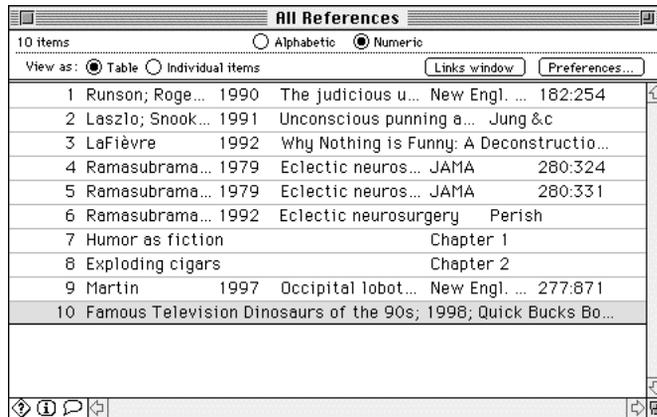


And with a new reference type the display is quite odd-looking indeed:



---

The same applies to the All References window:



### Quick reader challenge: So what's the problem here? What's the solution?

Subtle hint: see chapter subtitle, above.

The problem here is that the preview display uses Papyrus's built-in STANDARD format. And the All References window uses the BRIEF format. (Unless you've changed those settings in your Preferences.) Neither of these built-in formats—nor any other existing format, for that matter—knows about your new field or new reference type.

A new field is not included in the format's templates that indicate which fields appear, in what order, and with what intervening punctuation. So when you display a reference containing information in the new field, that information will not be included.

For new reference types, there isn't even a template. Rather than display absolutely nothing, though, Papyrus makes up a stand-in template for the new reference type, simply displaying **all** fields, in the same order used in the Reference Entry window, separated by **semicolons**.

### Second chance reader challenge: So what's the solution?

The solution is to **update your formats**, editing them to teach them about your new field or reference type. Using the techniques described in the *Creating New Output Formats* chapter, you must edit each format that you use. Go through the format's existing templates and add your new field wherever you would like it to appear. And create new templates in there for your new reference types.

*However*, Papyrus does not allow you to edit its **built-in formats**—STANDARD, BRIEF, and COMPACT. (Why do you think they're called "built-in"?) So for these you must do the following:

- 
- In the Formats window, select one of the built-in formats.
  - Click the **Duplicate** button.
  - You now have a new format with a name such as STANDARD copy. Change the name to something more meaningful such as STANDARD for Sally.
  - Edit this new format, adding your new fields to the existing templates and creating new templates for your new reference types.
  - Using the Preferences... buttons in the Reference Entry, Group, and All References windows, change the default display format from STANDARD or BRIEF to STANDARD for Sally or BRIEF for Sally.

## See Also...

Although Papyrus does make it easy for you to create new fields and new reference types, you will want to consider carefully before doing so. As indicated by what you've just read about updating your formats, there are going to be a few side-effects when you alter the fundamental structure of your database.

But when you've got a good reason to add a new field or reference type, go for it! Papyrus is here to meet *your* needs.

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## See also:

### REFERENCE

*Database Settings*  
*Reference Entry Window*  
*Template Entry*

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## Alphabetizing Rules

Introduction .....	W304
Database sorting .....	W304
Group sorting .....	W305
See Also.....	W306

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## Introduction

Papyrus uses the Macintosh's system software to sort alphabetic entries according to the rules of whatever languages you prefer. In addition to setting the language rules for your entire Papyrus database, you can also override these for individual Groups.

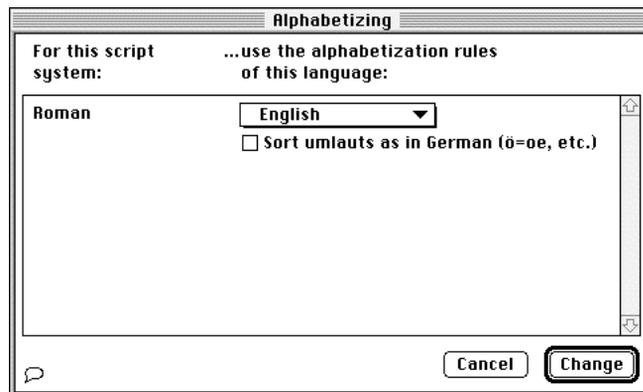
Most of you in countries using Western European languages have a single **script system** installed on your computers, namely **Roman**. Within the Roman system are included languages such as English, French, German, Danish, *etc.*

There are many script systems available. These include Japanese, Chinese, Arabic, Hebrew, Thai and quite a few others. As with the Roman script system, each of these can include a number of languages and dialects.

If your Macintosh uses more than one script system, Papyrus allows you to specify for *each* script system which language's rules should govern alphabetizing.

## Database sorting

From the **File** menu choose **Database Settings...** Then click the **Alphabetizing** button to bring up this dialog:



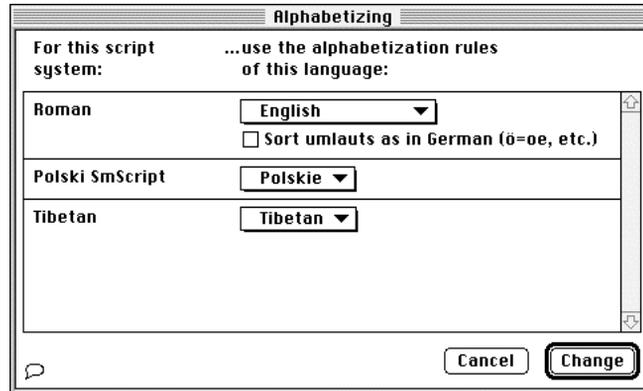
From the pop-up menu pick the appropriate language.

We have provided the Sort umlauts as in German checkbox for two reasons. First, even if you are sorting according to the rules of English you might prefer to sort umlauted letters according to the German method (ö sorted as oe) rather than the English method (ö sorted as o).

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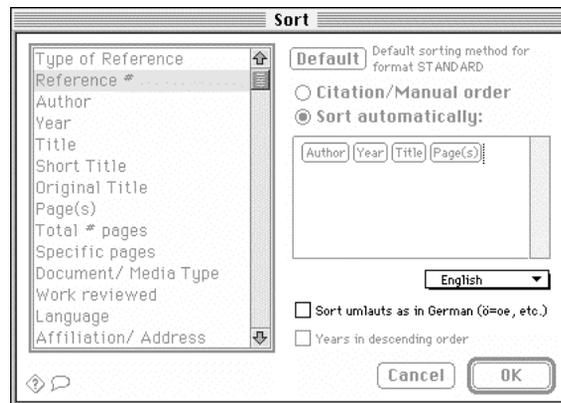
Second, our experiments with at least some versions of Apple's system software have shown that even when set to use German rules, the system software continues to sort ö as o. If you check the above box then Papyrus will ensure the correct sorting of unlauded letters.

If you have multiple script systems installed, then they will all appear in the **Alphabetizing** dialog:



## Group sorting

With a Group open, go to the **Group** menu and choose **Sort...**



---

The language **pop-up menu** allows you to specify the language whose alphabetizing rules should govern the sorting of references in this Group. You might want to override your database's language settings, for example, if you keep your database sorted according to your native language but are currently preparing a bibliography for publication in a foreign language journal.

As with the database settings, you can indicate what to do about unlauded letters independently of the language rules.

If your system includes more than one script system, a second pop-up menu will appear:



Roman    English

Sort umlauts as in German (ö=oe, etc.)

Select in turn each script from the script menu, and then use the language menu to choose the appropriate language for that script.

## See Also...

While Papyrus makes it easy for you to change the method of alphabetizing, behind the scenes Papyrus has to do a remarkable amount of work to keep everything consistent. Let us know if you ever come upon a language with which Papyrus doesn't seem to be working perfectly!

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## See also:

### REFERENCE

*Database Settings*  
*Sort*

## Exchanging Data With Papyrus Version 7

Introduction .....	W308
7→8: Entire database .....	W308
7→8: Selected references.....	W310
7→8: Keywords .....	W313
7→8: Journals.....	W314
7→8: Formats .....	W315
8→7: References .....	W317
8→7: Keywords .....	W318
8→7: Journals.....	W319
See Also.....	W320

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## Introduction

If you or one of your colleagues uses Version 7 of Papyrus for DOS, then you may want to exchange information between that Version 7 database and your Papyrus Version 8 database.

We have put considerable effort into making this sort of exchange as smooth as possible. The differences between Macintosh and DOS mainly relate to accented and non-English characters, and we have done what we can to deal with those issues automatically. But the bigger challenge lies in the differences between Version 7 and Version 8 of Papyrus—the latter includes many more fields and reference types, so clearly there must be some compromises made when sending Version 8 data back to a Version 7 database.

In this chapter I'll cover the various sorts of transfers possible between the two versions of Papyrus.

### 7→8: Entire database

Transferring an entire Version 7 database to Version 8 is straightforward. You will have Version 7 create a set of Papyrus “back-up” files. Then you will tell Version 8 to import these files into a Version 8 database.

You can create a fresh Version 8 database into which the data are to be transferred. Or you can bring the data into an existing Version 8 database that already contains its own information. Duplicate references, journals, and keywords will all be handled intelligently.

In Version 7 do this:

- From the Utilities menu, run **Create Back-up Files**. This will create a set of files whose names all end in **.BB**.

Don't confuse these with the **\*.BIB** files that comprise your Version 7 database itself.

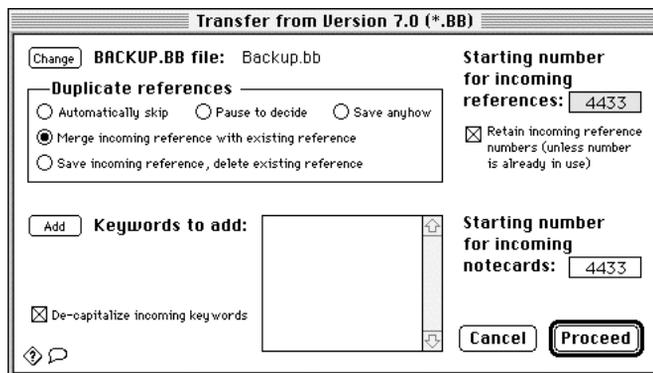
Next do this:

- Move all of these **\*.BB** files from the DOS computer to your Macintosh.

Now in Version 8 do this:

- Either open an existing Papyrus Version 8 database, or else create a fresh one.
- From the **File** menu choose **Papyrus-Papyrus Transfer...**
- Click the button **Import from Version 7 - \*.BB files**.
- Papyrus will ask you to point it to one of the **\*.BB** files, specifically **BACKUP.BB**. (Things will be simplest if *all* of the **\*.BB** files are located in the same folder as **BACKUP.BB**.)

You will now be faced with this dialog:



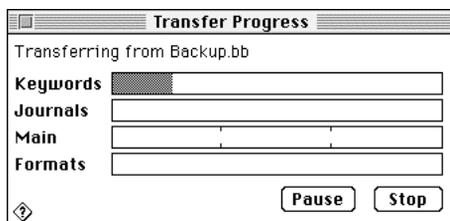
This dialog is quite similar to Papyrus's usual **Import dialog**. The sections regarding **Duplicate references**, **Keywords**, and **Reference numbering** behave identically.

If your Version 7 database includes notecards, then you'll want to give a moment's thought to dealing with **notecard numbering**. In Version 7 notecards do not have numbers; they are simply a sort of sub-record tied to a particular reference. But in Version 8 notecards are independent records in their own right, each with its own **Reference #**.

If you intend to **retain** the **Reference #s** for incoming *references*, then you will not want incoming *notecards* to be assigned numbers in the same range. That could lead to a notecard being given a number already in use by a reference yet to be imported, which in turn will lead to that reference being assigned a fresh number upon arrival, which in turn will usurp a different reference's number, and so on.

So if you do wish to retain your Version 7 references' **Reference #s**, for **Starting number for incoming notecards** you should enter some large number, beyond that in use by your existing references. For example, you might start notecard numbering at 10000.

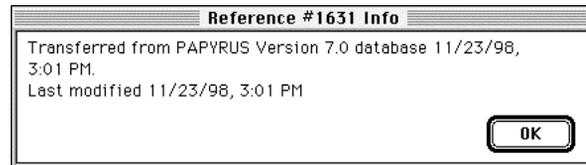
After you click **Proceed**, the **Transfer progress** window will appear:



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Papyrus will begin by importing all of the Version 7 keywords, and then all of the journals. The biggest job is importing the “main” file, which includes the references and notecards (and also glossary entries). Hooking everything up correctly involves three passes through the main files, as indicated by the three divisions of the progress bar for Main. Finally the Version 7 formats will be converted into Version 8 formats and transferred.

Once transferred, the Version 7 keywords, journals, references, *etc.* will be full-fledged Version 8 records. The only way to see that any of these originated in Version 7 is by doing a **Get Info** on one of the transferred references or notecards:



## 7→8: Selected references

Version 7 uses the PAPX format to transfer references from one Version 7 database to another. You can use this same format to send references to Version 8.

In Version 7 do this:

- If you have never used the PAPX format, use the Format liBRary option to open the IMPORT.FLB Format Library and then **copy** PAPX from the Library to your database.
- From the main menu, use the List option to export whichever references you like. Be sure to specify PAPX as the format to use. Papyrus will create a text file with whatever name you indicate.

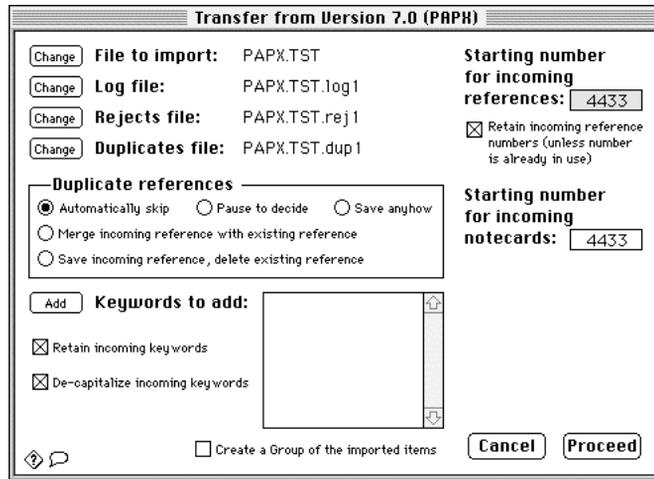
Next do this:

- Move this text file from the DOS computer to your Macintosh.

Now in Version 8 do this:

- Either open an existing Papyrus Version 8 database, or else create a fresh one.
- From the **File** menu choose **Papyrus-Papyrus Transfer...**
- Click the button **Import from Version 7 - PAPX file.**
- Papyrus will ask you to identify the PAPX text file to be imported.

You will now be faced with this dialog:



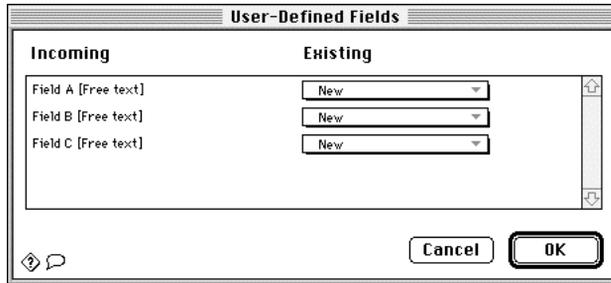
This dialog is quite similar to Papyrus’s usual **Import dialog**. The sections regarding the **Log** and other files, **Duplicate references**, **Keywords**, and **Reference numbering** behave identically.

If your Version 7 database includes notecards, then you’ll want to give a moment’s thought to dealing with **notecard numbering**. In Version 7 notecards do not have numbers; they are simply a sort of sub-record tied to a particular reference. But in Version 8 notecards are independent records in their own right, each with its own **Reference #**.

If you intend to **retain** the **Reference #s** for incoming *references*, then you will not want incoming *notecards* to be assigned numbers in the same range. That could lead to a notecard being given a number already in use by a reference yet to be imported, which in turn will lead to that reference being assigned a fresh number upon arrival, which in turn will usurp a different reference’s number, and so on.

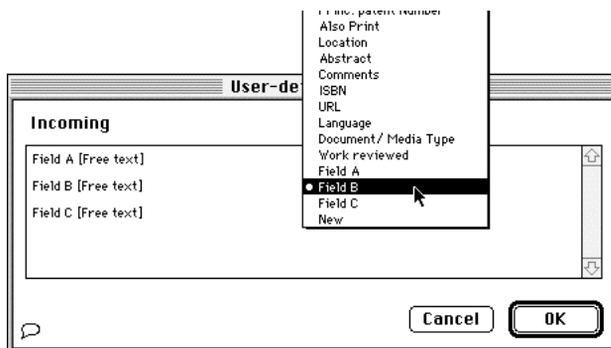
So if you do wish to retain your Version 7 references’ **Reference #s**, for **Starting number for incoming notecards** you should enter some large number, beyond that in use by your existing references. For example, you might start notecard numbering at 10000.

After you click **Proceed** Papyrus will ask you what you wish done with the three **user-defined fields** from Version 7:



If this is your first transfer from Version 7 then you might indeed want to let Papyrus proceed to make New fields for each of these. As in Version 7 the fields will initially be named Field A, Field B, and Field C, but you can change these field names later.

If you have already imported some Version 7 references, though, you will find that your Version 8 database *already* has three fields with these names. In that case use the pop-up menus to ensure that those same fields are used now:



**However**, consider this. If you are transferring references from several **different people's** Version 7 databases, then you might actually prefer to create a new set of fields for each of these. If John used his Field A to indicate in which filing cabinet he stored his reprints, while Jane used her Field A to hold the price of her books, and Jean used Field A for the color of book jackets, then you don't necessarily want all of these disparate bits of knowledge to end up in the same field in your Version 8 database.

Finally, because Papyrus Version 8 contains a number of fields that were not present in Version 7, you might now choose to have Papyrus move information from a Version 7 user-defined fields into a now-available Version 8 field.

---

## 7→8: Keywords

It's easy to transfer a list of keywords from Version 7 to Version 8.

In Version 7 do this:

- From the main menu choose **Keywords**, and then from the **Keyword Options** menu choose **List**.
- Indicate the starting and ending range of keywords you wish to transfer.
- For **On device**: choose **File**. When asked for **Filename**: enter whatever name you like.
- Papyrus will then ask **Suppress header and frequencies, for subsequent Keyword Load?** Answer **Y**.
- Papyrus will now create a text file with the name you provided, containing a list of keywords.

Next do this:

- Move this text file from the DOS computer to your Macintosh.

Now in Version 8 do this:

- Open the **Keywords window**.
- Click the **Load...** button.
- Papyrus will ask you to identify the text file containing the keyword list.

That's all there is to it, with one caveat.

Papyrus Version 8 assumes that the incoming text file is a Macintosh text file rather than a DOS text file. This means that **accented letters** and **non-English** characters will be altered in the loading process. So if your keywords do contain such characters you should first use your **Macintosh word processor** to open the text file, clean up any mistranslated characters, and then save the results as a new text file. This new file is the one that you will then tell Papyrus to load.

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## 7→8: Journals

It's easy to transfer a list of journals from Version 7 to Version 8.

In Version 7 do this:

- From the main menu choose **Journals**, and then from the **Journal Options** menu choose **List**.
- Indicate the starting and ending range of journals you wish to transfer.
- If your Version 7 database includes more than one **journal abbreviation style**, Papyrus will now ask you which style to include in the list. Pick whichever is appropriate.

If you have more than one abbreviation style, and wish to transfer all of them, then you will repeat this entire transfer process for each style. Papyrus will intelligently merge incoming journals that share a common journal name.

- For On device: choose **File**. When asked for **Filename**: enter whatever name you like.
- Papyrus will then ask **Suppress header and frequencies, for subsequent Journal Load?** Answer **Y**.
- Papyrus will now create a text file with the name you provided, containing a list of journals.

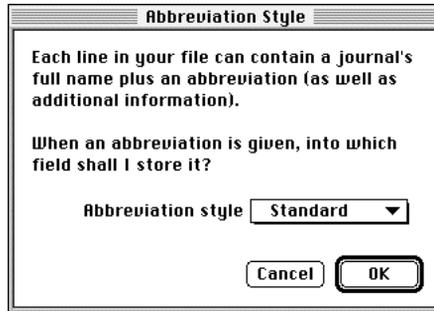
Next do this:

- Move this text file from the DOS computer to your Macintosh.

Now in Version 8 do this:

- Open the **Journals window**.
- Click the **Load...** button.
- Papyrus will ask you to identify the text file containing the journal list.

You will then be asked:



If in Version 8 you have not created your own custom **journal abbreviation styles**, then the suggested **Standard** abbreviation style is indeed the correct answer. Otherwise pick whichever abbreviation style is appropriate.

Papyrus Version 8 assumes that the incoming text file is a Macintosh text file rather than a DOS text file. This means that **accented letters** and **non-English** characters will be altered in the loading process. So if your journals do contain such characters you should first use your **Macintosh word processor** to open the text file, clean up any mistranslated characters, and then save the results as a new text file. This new file is the one that you will then tell Papyrus to load.

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## 7→8: Formats

Papyrus Version 8 is **not** able to read a Format Library created in Version 7.

So if you wish to transfer one or more Version 7 formats to Papyrus, you must do so by transferring an **entire database** which includes those formats.

If you only want to move some specific formats from Version 7 to Version 8, then, here is a reasonable approach:

In Version 7 do this:

- Make a new Format Library and add the relevant formats to it.
- Make a new, empty Version 7 database.
- In this new database, open the Format Library and copy all the formats from it.
- From the Utilities menu, run **Create Back-up Files**. This will create a set of files whose names all end in **.BB**.

Next do this:

- Move all of these \*.BB files from the DOS computer to your Macintosh.

Now in Version 8 proceed as I've explained under 7→8: *Entire database*.

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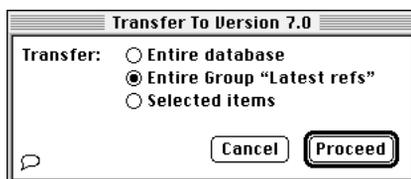
## 8→7: References

Papyrus Version 8 can export references using the PAPX format recognized by Version 7.

In Version 8 do this:

- If you wish to export only selected references from your total database, then either select them in the All References window or a Group window, or else create a Group that contains just the relevant references.
- From the **File** menu choose **Papyrus-Papyrus Transfer...**
- Click the button **Export for Version 7**.

Papyrus will now ask you which references you wish to export:



When you click **Proceed**, Papyrus will have you provide a name for the new file it is about to create.

Next do this:

- Move this file from your Macintosh to the DOS computer.

Now in Version 7 do this:

- If you have never used the PAPX format, use the **Format liBRary** option to open the **IMPORT.FLB** Format Library and then **copy** PAPX from the Library to your database.
- From the main menu, choose the **iMport** option. When asked, tell Papyrus the name of the file you have brought over from the Macintosh, and specify PAPX as the import format to use. Stick with the suggested **Fussiness Level of Oblivious**. Answer the remaining questions as you deem appropriate.

If your Version 8 references include information in fields that did not exist in Version 7, this information will be moved to the **Comments** field.

If any of your Version 8 references are of a reference type that did not exist in Version 7, they will be exported as type **Other**.

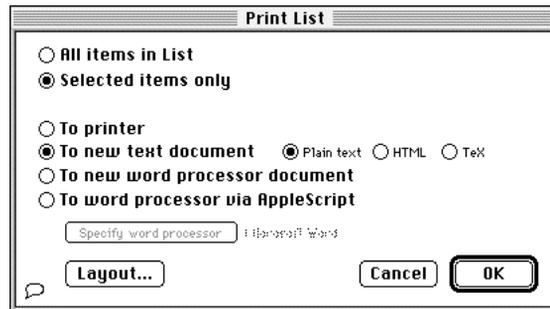
---

## 8→7: Keywords

Moving a list of keywords from Version 8 to Version 7 is straightforward.

In Version 8 do this:

- Open the **Keywords window**.
- If you wish to export only certain keywords, select them now.
- Choose **Print/Export...** from the **File** menu. In the resultant dialog, specify Plain text document:



- Click the **Layout...** button and set **Skipped lines between items** to 0. Also make sure that **Fixed line length** is *not* checked.
- Provide a name for the new file Papyrus is about to create.

Next do this:

- Move this new file from your Macintosh to the DOS computer.
- You must convert the Macintosh text file that Papyrus has created to a DOS text file. The easiest way to do this is via the program **MACCVT.EXE**, available from your DOS Papyrus installation disks or from our Web site.

Now in Version 7 do this:

- From the main menu, pick **Keywords**.
- From the **Keyword Option** menu, pick **lOad**.
- Identify the file to be imported. (This will be the file created by **MACCVT.EXE**).

Papyrus Version 8 creates a Macintosh text file rather than a DOS text file. Although **MACCVT.EXE** handles the basic Mac→DOS conversion, it does not do anything about **accented letters** or **non-English** characters. If your keywords contain such characters, then after running the file through **MACCVT.EXE** you should use your **DOS or Windows word processor** to open the text file, clean up any mistranslated characters, and then save the results as a plain ASCII text file. This new file is the one that you will then tell Papyrus to load.

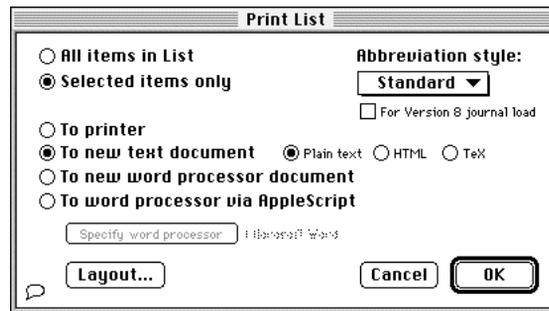
---

## 8→7: Journals

Moving journals from Version 8 to Version 7 is straightforward.

In Version 8 do this:

- Open the **Journals window**.
- If you wish to export only certain journals, select them now.
- Choose **Print/Export...** from the **File** menu. In the resulting dialog, specify Plain text document. (Do *not* check the For Version 8 journal load box that will appear when you select Plain text.)



- If you have set up more than one journal **abbreviation style** in your database, you can use the pop-up menu to pick the appropriate one.

If you have more than one abbreviation style, and wish to transfer all of them, then you will repeat this entire transfer process for each style. Papyrus will intelligently merge incoming journals that share a common journal name.

- Click the **Layout...** button and set **Skipped lines between items** to 0. Also make sure that **Fixed line length** is *not* checked.
- Provide a name for the new file Papyrus is about to create.

Next do this:

- Move this new file from your Macintosh to the DOS computer.
- You must convert the Macintosh text file that Papyrus has created to a DOS text file. The easiest way to do this is via the program **MACCVT.EXE**, available from your DOS Papyrus installation disks or from our Web site.

Now in Version 7 do this:

- From the main menu, pick **Journals**.
- From the Journal Option menu, pick **lOad**.

- 
- Identify the file to be imported. (This will be the file created by MACCVT.EXE).
  - If this Version 7 database includes more than one journal **abbreviation style**, Papyrus will now ask you which one is being used in the incoming file.

Papyrus Version 8 creates a Macintosh text file rather than a DOS text file. Although MACCVT.EXE handles the basic Mac→DOS conversion, it does not do anything about **accented letters** or **non-English** characters. If your journals contain such characters, then after running the file through MACCVT.EXE you should use your **DOS or Windows word processor** to open the text file, clean up any mistranslated characters, and then save the results as a plain ASCII text file. This new file is the one that you will then tell Papyrus to load.

## See Also...

If you will often be moving data back and forth between Versions 7 and 8 of Papyrus you may decide to limit yourself in Version 8, sticking to the fields and reference types that exist in Version 7. You will want to give this a little thought, and maybe some experimentation.

When you transfer either an **entire database** or **selected references** back and forth, Papyrus will automatically handle all DOS/Mac conversions. When you transfer only a text file containing a list of **journals** or **keywords**, though, remember to use a word processor to clean up accented and non-English characters.

---

## See also:

### REFERENCE

*Keywords Window*  
*Journals Window*  
*Formats Window*  
*Papyrus-Papyrus Transfer*  
*Print/Export*  
*Import*

## Exchanging Data With Another Papyrus Version 8 Database

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---

## Introduction

We have designed Papyrus Version 8 so that transfers between databases are very easy.

Recall that every Papyrus database comprises two documents—a **main database document** and an **index file**:



To make a **back-up copy** of your entire database, or to **move the entire database** to another computer, simply copy **both** of these documents.

If you lose the index file, or you're too short on space to copy it, that's okay. From just a main database document Papyrus can regenerate the associated index file.

If you wish to **combine two different databases on the same computer**, you will tell Papyrus to read into one database all the data from the **main database document** of the other database.

If you wish to **combine two different databases on different computers**, you must first copy the **main database document** from one database to the other computer. You do *not* need to also copy the index file, though.

In the following sections I will provide the details for transferring an entire database, as well as instructions for transferring only selected references, keywords, journals, *etc.*

## Entire database

An extremely common situation arises when you wish to use the **same database on more than one computer**. You might want to move the database back and forth between your desktop and laptop machines, for example. Or between the computers of a researcher and a secretary.

All you need do is copy both the **main database document** and the **index file** of the database from one computer to the other, in the process overwriting the older copy of the database previously present on the recipient computer.

Be careful to make all additions and corrections to just **one** of the computers. Later you can copy the entire updated database back to the other machine.



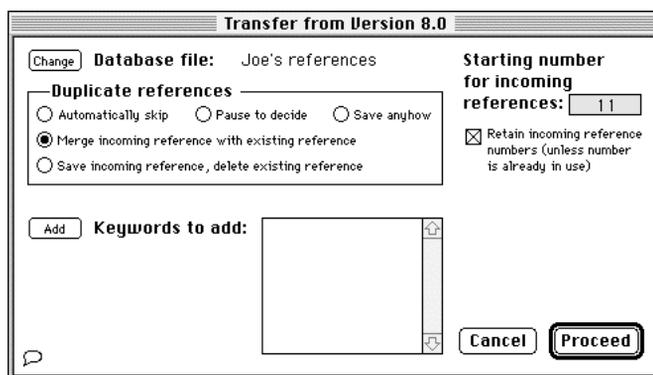
---

It is also possible to **absorb** one database into another. Perhaps one of your Papyrus-using colleagues wishes to share her data with you. Or maybe you are collecting into one master database all of the information that several other people are gathering in their own databases.

With your own already database open, here is how to absorb another database:

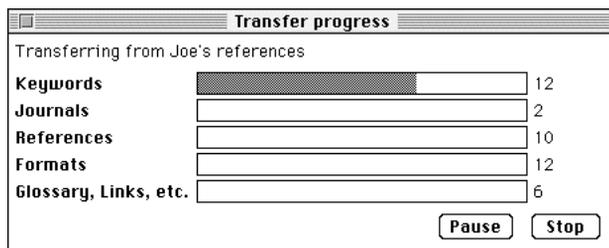
- From the **File** menu choose **Papyrus-Papyrus Transfer...**
- Click the button **Import from Version 8.**
- Papyrus will ask you to point it to the **main database document** from the other database.

You will now be faced with this dialog:



This dialog is quite similar to Papyrus's usual **Import dialog**. The sections regarding **Duplicate references**, **Keywords**, and **Reference numbering** behave identically.

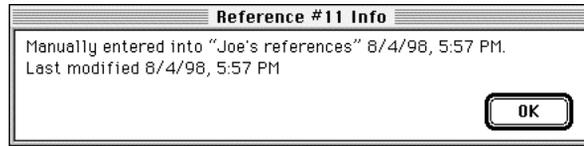
When you click **Proceed**, the **Transfer progress** window will appear:



Papyrus will deal intelligently with duplicate keywords, journals, *etc.*

---

Later you can always determine the origin of a reference via **Get Info**:

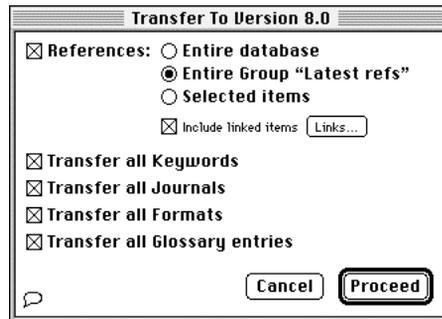


## Selected references

You may find yourself in a situation where you wish to move some references from one Papyrus database to another, but not the *entire* database of references. In such cases your first step will be to create a new **main database document** that contains only the relevant references.

- Begin by making a Group that contains the references in question. Or else select these references in the All References window or in some Group window.
- From the **File** menu choose **Papyrus-Papyrus Transfer...**
- Click the button **Export for Version 8**

Papyrus will now ask you which references you wish to export:



If you have **links** connecting these references to other references or notecards, you have the option of automatically including all such linked items in your export. And, as usual with links, you can click the Links... button to specify which types of links should be followed.

As you can see, you also have the option of exporting your database's entire collection of keywords, journals, formats, and/or glossary entries. If you do *not* select these, Papyrus will still export any journals or keywords that are **cited** by the references that are exported.

---

When you export references, Papyrus automatically includes in the new database document the definitions of any **new fields or reference types** you have created. This will allow the recipient database to correctly “understand” all of the incoming data.

- After you click **Proceed**, Papyrus will ask you to provide a name for the new main database document it is about to create.

The main database document you have just created is a full-fledged Papyrus database main database document. If you give it to a new Papyrus user, that person can take this file, as is, as the starting point for his own database.

But if the recipient already has his own Papyrus database, and now wishes to **add** to it the data from your document, he simply follows the same *Import from Version 8* steps I’ve already described.

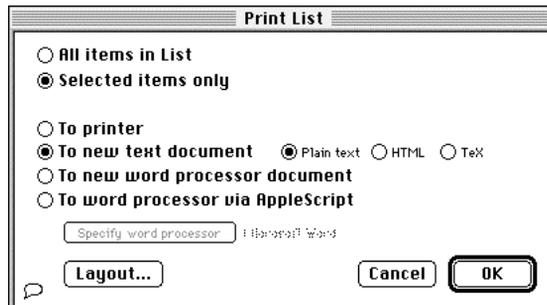
## Keywords

To move your **entire** keyword collection to another Papyrus database, you can follow the *Export for Version 8* steps described earlier in this chapter.

But if you wish to transfer only a **selected** subset of your keywords, then there is a different approach. You will tell Papyrus to export that subset of keywords to a **text file**. Then the recipient database will **Load** the text file, absorbing these new keywords.

To export the keywords, do this:

- Open the **Keywords window**.
- Select the relevant keywords.
- Choose **Print/Export...** from the **File** menu. In the resulting dialog, specify Plain text document:



- 
- Click the **Layout...** button and set **Skipped lines between items** to 0. Also make sure that **Fixed line length** is *not* checked.
  - Provide a name for the new file Papyrus is about to create.

Now to import the keywords into the recipient database, do this:

- Open the **Keywords window**.
- Click the **Load...** button.
- Papyrus will ask you to identify the text file containing the keyword list.

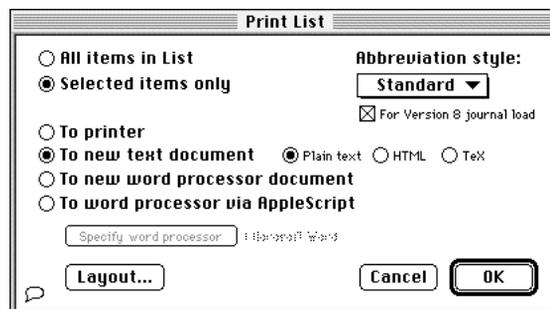
## Journals

To move your **entire** journal collection to another Papyrus database, you can follow the *Export for Version 8* steps described earlier in this chapter.

But if you wish to transfer only a **selected** subset of your journals, then there is a different approach. You will tell Papyrus to export that subset of journals to a **text file**. Then the recipient database will **Load** the text file, absorbing these new journals.

To export the journals, do this:

- Open the **Journals window**.
- Select the relevant journals.
- Choose **Print/Export...** from the **File** menu. In the resultant dialog, specify Plain text document:



- If you select **For Version 8 journal load**, then Papyrus will include each journal's Call Number, ISSN, URL, and Comments in addition to its name and abbreviation.
- If you have set up more than one journal **abbreviation style** in your database, you can use the pop-up menu to pick the appropriate one.

---

If you have more than one abbreviation style, and wish to transfer all of them, then you will repeat this entire transfer process for each style. Papyrus will intelligently merge incoming journals that share a common journal name.

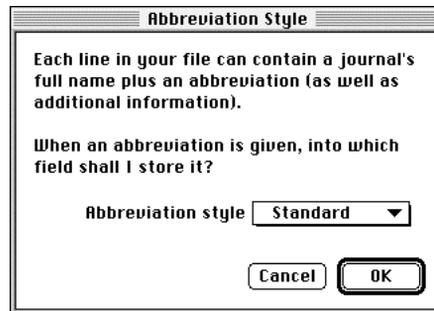
Are you wondering why checking **For Version 8 journal load** can't include *all* abbreviation styles along with the rest of each journal's information? The reason is that your database and the recipient database might have different numbers of abbreviation styles, or different assignments—*e.g.*, your style #2 might correspond to the other database's style #3. By including only a single style here in the export step, we allow the recipient to assign the incoming abbreviation to the correct field.

- Click the **Layout...** button and set Skipped lines between items to 0. Also make sure that Fixed line length is *not* checked.
- Provide a name for the new file Papyrus is about to create.

Now to import the journals into the recipient database, do this:

- Open the **Journals window**.
- Click the **Load...** button.
- Papyrus will ask you to identify the text file containing the journal list.

You will then be asked:



If in the recipient database you have not created your own custom **journal abbreviation styles**, then the suggested **Standard** abbreviation style is indeed the correct answer. Otherwise pick whichever abbreviation style is appropriate.

---

## Formats

To move your **entire** format collection to another Papyrus database, you can follow the *Export for Version 8* steps described earlier in this chapter.

You also already know how to move only **selected** formats—via **Format Libraries**:

- From the **Formats window** create a new Library, and drag or copy into it the relevant formats.
- Then take that Library to the recipient database, open it, and drag or copy the formats from the Library window to the database's Formats window.

## Names

You *cannot* transfer your database's **entire** list of author and editor names to another database, for the simple reason that the Names window only shows two kinds of names:

- Names that are currently **cited** by at least one reference
- Names that are **sorted differently** than they are spelled

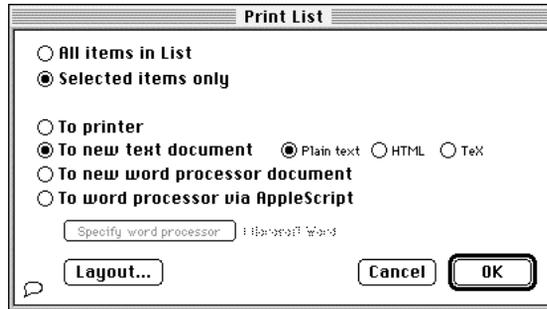
So a recipient database won't be interested in any normally-sorted names that do not already appear amongst its references' authors and editors.

However, if you have carefully checked the sorting of many names in your database that are indeed sorted differently from their spelling, you might wish to share this information with another Papyrus database.

To do so, you will export some or all of the names from your database to a **text file**. Then the recipient database will **Load** the text file. When it does so, it will ignore any normally-sorted names. But any names whose sorting differ from their spelling will be retained.

To export the names, do this:

- Open the **Names window**.
- Optionally, select the relevant names.
- Choose **Print/Export...** from the **File** menu. In the resultant dialog, specify Plain text document:



- Click the **Layout...** button and set **Skipped lines between items** to 0. Also make sure that **Fixed line length** is *not* checked.
- Provide a name for the new file Papyrus is about to create.

Now to import the names into the recipient database, do this:

- Open the **Names window**.
- Click the **Load...** button.
- Papyrus will ask you to identify the text file containing the list of names.

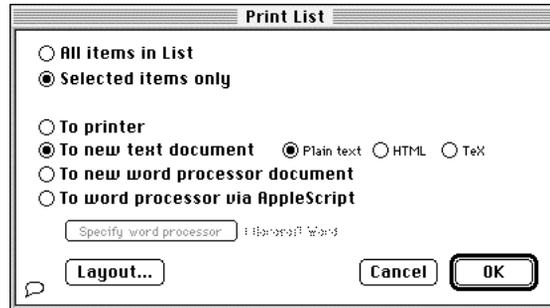
## Glossary entries

To move your **entire** glossary to another Papyrus database, you can follow the *Export for Version 8* steps described earlier in this chapter.

But if you wish to transfer only a **selected** subset of your glossary entries, then there is a different approach. You will tell Papyrus to export that subset of entries to a **text file**. Then the recipient database will **Load** the text file, absorbing these new glossary entries.

To export the entries, do this:

- Open the **Glossary window**.
- Select the relevant entries.
- Choose **Print/Export...** from the **File** menu. In the resultant dialog, specify Plain text document:



- Click the **Layout...** button and set **Skipped lines between items** to 0. Also make sure that **Fixed line length** is *not* checked.
- Provide a name for the new file Papyrus is about to create.

Now to import the glossary entries into the recipient database, do this:

- Open the **Glossary window**.
- Click the **Load...** button.
- Papyrus will ask you to identify the text file containing the entries.

## See Also...

As you've seen, exchanging data between Version 8 databases is straightforward, yet very flexible.

---

## See also:

### REFERENCE

*Keywords Window*  
*Journals Window*  
*Formats Window*  
*Names Window*  
*Glossary Window*  
*Papyrus-Papyrus Transfer*  
*Print/Export*  
*Import*

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# Index

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