Pybliographer User's Guide

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Contents

Part I.   Introduction

Chapter 1. A Primer for Pybliographer

This chapter provides an introduction to Pybliographer for new users. If you are already familiar with Pybliographer, you can skip this chapter.

1.1   How Pybliographer can Help You

Pybliographer provides Reference manager services to create, load, modify, list, read, transport, and copy description of resources like books, articles, and electronic documents, including derivative and private information.

To introduce you to the use of Pybliographer, we consider three scenarios or *workflows* first. Each of these scenarios represents a basic usage context for the application. In the following they are presented in sequence of increasing complexity, so that each one is, in fact, included in the next.

1.1.1   Scenario: Search and Browse

Searching information is certainly the most fundamental (also the most frequent) task for a reference manager database. You can look up records in a variety of ways, starting from whatever information you have. There are two ways to start a search, (i) by entering *search terms*, be it words or *regular expressions*, or (ii) alternatively by *selecting index terms* from a list. This list can be a comprehensive index of, e.g., persons taken from the whole database, or the result of an operation; so you can effectively follow the associations from article to person to other article and so on.

In general the searching can be subdivided into the following stages and tasks:

Stage	Description
1	Choose a database, *if necessary*
2	Do a *Known-Item-Search*, e.g., with an author/title pair, *or*
3	*Browse an Index*, if you are looking for things you don't know beforehand (or might have forgotten), e.g., in a Journals Index, *or*
4	Follow a cross-reference, e.g., by looking at the works of an author, or papers which cite another, *or*
5	Based on the results, variate or make more precise the search question, or even
6	Formulate an *expert query*, this requires some acquaintance with the data base.
7	*Look over the results.* Examine individual records.
8	Mark items to set them aside for further examination or processing.
9	Add a note to an item.
10	Output all or any of the items, in various formats, to another file, to the clipboard for inclusion in another document (using *Drag-and-drop*), to the printer.

1.1.2 Scenario: Write a Paper

Within the following scenario, you will find yourself searching and browsing (as above in 1.1.1) many times; now these *Use Cases* are imbedded in more complex processes. So, e.g., stages 6 and 7 below consist not only of searching and browsing activities, but integrate them with the writing process: an item is not only found, but it's citation is included in the document in preparation, it is placed on or taken from a work list, a reference is linked back to the cited item etc.

Stage	Description
	Collect Information
1	Maintain a reading list.
2	Acquire information from databases.
3	Acquire information from other sources.
4	Add notes and quotes.
	Write
5	Maintain a work plan.
6	Find items, notes, quotes, etc.
7	Insert and mark-up references and quotes.
8	Audit work done. (Check cited works, etc.)
9	Process references for output formatting.

1.1.3 Scenario: Maintain a Bibliography

The linking process that lies at the core of Pybliographer's support of the writing process is applied in the next, most demanding situation to documents of various kinds that are *given* and *augmented* for better analysis and access.

Stage	Description
1	Organise work.
2	Add and import records.
3	Check, edit and merge records.
4	Add documents.
5	Describe (mostly) archival items and collections.
6	Maintain authority data.
7	Add and edit access points.
8	Add annotations, other texts.
9	Process output.
10	Export data for backup, integration.

1.2   Bibliographic Records in Pybliographer

Note:

- Show a record display here for entertainment
- Explain major UI elements (1 page)

Description	Examples
Bibliographical Description According to ISBD, this comprises the title and statement of resposibility area, the edition area, the materials specific area, the publication statement area, the physical description area, the series statement area, the notes area, and the standard numbers and terms of availibility area.	+Der+ Zauberberg / Thomas Mann A l'ombre des jeunes filles en fleurs / Marcel Proust [kit] [motion picture] [art original] 31. Aufl. In full score Vol. 1, no. 1 (winter 1957)- Scale 1:3,500,000 Amsterdam: N. Israel, 1973 vi, 754 p. : ill. (some col.); 24 cm (Actualités scientifiques et industriels; 1236) Thesis (Ph.D.) – University of Michigan, 1971 Includes Indexes
Access Points This is information that characterises the item in terms which are, generally speaking, not taken from the item, at least not verbatim. Using a controlled vocabulary is als known as authority control, lists of such terms are called authority files. Names of persons and corporate bodies are (for the orthodoxy) the most important access points, and pose characteristic problems. Other types of data in this class are subject headings, classifications, keywords and uniform titles.	Albertus <Magnus> Montherlant, Henry +de+ Alvarez Quintero, Serafín, 1871-1938 Paulus <Apostolus>: Epistolae ad Thessalonicenses Deutscher Biologentag <6, 1964, Hersfeld> Programming languages (Electronic computers) 30 A 58 D.3 11103-57-4 (Vitamin A) EC 4.1.3.1 (isocitrate lyase)
Contents related information This includes all information taken from the item at hand, be it transcribed verbatim or not.	Abstract Short summary note Quotation Excerpt ad-hoc keyword
Task related data This information is used to keep track of various tasks associated with the reading and using of resources.	Project/reading list Desiderata Orders (bookseller, inter-library loan) Items by location (library, shelf)
Holdings information Information that is neccessary to gain access to an item	URL file name Call number Shelf number Institution (library) code Shelving place, binder (for copies)

Table 1.1.: Information stored in a reference manager

1.3   Describing Resources

> **Note:**
>
> - Give an overview of the requirements for various user situations (cf. Eversberg, ...)
> - Introduce to the Chapter 3 treatment of planning decisions w.r.t. level of description, use of classifications, *rigeur*
> - Background for daily work, giving overall direction.

Before we can search for them, the resources of interest must be identified and described. ...

- To identify
- To distinguish
- To access

1.3.1   A Model of Bibliographical Data

A model of the data that is relevant for our application (taken from Knorr [Knorr, 1998]) is shown in Table 1.1 on page 6.

1.4   Exploiting [Working with] Resources

We do not acquire, store, and browse bibliographical records for their own sake, but in order to put them to use. For at least as long as we are sitting at our thesis it is our daily task to use them and we want to make the most of them, and of the fatures that Pybliographer offers.

The most basic use is, of course, citing a source. Often that includes taking a quote from it. Then we might want to obtain a list of cited works (references), but also need support for our work in form of list of references eyemarked, or already used, or yet to be considered. It is furthermore helpful to be able to flexibly handle quotations.. . .

Often our memory is not quite up to the task and we want assistance in using sources, tha Pybliographer happily provides. It allows us to store quotes, to add notes, even longer excerpts and reviews, if we want. We can not only cite them comfortably, but also search them without regard to their being stored within or out of the database proper.

Finally, if our work continues for a while, we may find the many ways useful, that Pybliographer provides to *organise* the database. So we can ask for *subjects* by means of attaching subject headings or classification codes, we can trace editions and reviews of or references to a work, and we can keep track of our own work.

1.5 Special Materials

Many reference managers are geared towards the formatting of references most frequent in scientific/technical papers, almost as much as library type applications are towards the cataloguing of monographs.

In contrast Pybliographer tries to be adaptable and extensible enough to support the specialist, while not losing its usability for the average user (which the specialist remains to be, after all, outside of his area of specialisation).

What does that mean? Pybliographer provides an extensible, open, and adaptable database schema, and appliction programming interface (API). More about extending and adapting Pybliographer can be found in chapter 25. An interface alone, however is not sufficient. Of equal or possibly even greater importance is a sound database structure, something missing from most popular alternatives. More about the database structure you can find in section 2.1.

In the following a number of specific requirements are detailed, together with an indication of what Pybliographer does offer you in that respect.

Archival and administrative records need a different treatment because they are unique, depending on context (provenance) for description, access, and interpretation. Thus they require a multi-level description, as item but also on the collection level. In addition, they often form series, that warrant structured annotations for analysis, . . .

Continuing resources, collections include serials, journals, web-sites, e-journals, and the like (user-maintained, so-called artificial collections are similar enough to warrant mention here). The degree of *description* that is usually needed varies considerably, what is important, however, is the support Pybliographer provides for not-so frequent situations.

Multi-level description is generally available and helps with handling of articles in journals (journal data are stored and maintained separately) monographs in series, documents on web-sites, and so on.

Analytical annotations add to the annotation facilities with the option of form-based or tabular data entry. Typical situations are preparation of meta-analyses or historical case analyses. (Example . . .) (This is really a requirements statement XXX)

Music is supported by (i) multilevel description for, e.g., sound recordings, where more than one piece is on one carrier, and (ii) by handling *works*, allowing searching and displaying of multiple recordings but also manuscript or printed scores, etc.

Audio and Video Recordings and many other materials can be correctly described

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Note:

- This section should alert the user to the fact that the needs of particular kinds of materials are looked after, – and that there are such special needs.

- I would rather like a table: Material – Problem – Solution
- Cf. AACR2R for a list of special materials (and MARC 007)

1.6   Special Needs

Note:

- More processing related questions?

Chapter 2.   Pybliographer Concepts

This chapter summarises some basic concepts that you need to understand before you can use Pybliographer. It briefly describes:

- What bibliographic items are and how they are described
- What basic data types are used
- How the data is stored and processed
- How Pybliographer can help you storing and editing bibliographic resources and using them in you work

2.1   The Content of the Database

The Pybliographer database contains records of many types. The following main classes can be distinguished:

- Records that contain classifying information *in the widest sense*, and which are loosely called *Topics*, as they are subclasses of Topic.
- Records that contain the bibliographic description proper
- Records that contain additional data, loosely called *annotations*.
- Internal records, containing *configuration objects*.

2.1.1   Informations that Structure the Database

The information that we speak about in this section represent a concepts of bewildering variety – however they all serve the common purpose of organising the *payload* of the database and share a common technical base.

Classifiers: Languages, Genres, Forms, etc. Without doubt, this is the least difficult kind of data used in connection with bibliography. We have no taxonomic (tree-like) structure, but only a linear list of possible values, and mostly but little in way of name variants (*see* references), only the need for translations of the list entries are a small complication that implies a little by way of programming.

In most cases, such values are not *indexed* in the sense that a list of items such as those that fulfil "Language = XYZ" is maintained by the system. A query for all such items is then necessarily done by scanning the whole database. See 3.3 for more informations.

Keywords, Descriptors Look similar but are very different because they do not come from a (mostly) pre-defined set. That makes a difference not only for the programmer, but also for the user – the longer list is not as easy to overview, see 5.2 for a discussion of keywords.

Open-ended lists occur also in connection with externally defined descriptors, such as the enzyme (EC) numbers. These are considered classifications (degenerate, if they do not form a tree, v. infra).

Subject headings on the other hand have a *taxonomic* structure, they are linked to permit navigation to and from broader and narrower terms as well as related or opposite terms. This comes at a price (no surprise) and most users will content themselves with what external databases provide. Note, however, that Pybliographer comes with a relatively sophisticated model of subject headings, which you could use to your profit by mapping incoming externally defined values to the preferred set, if you have one available for your area of work.

Classifications The other generally used means of adding subject information to bibliographical records is by classifying the items described. A classification, as e.g., the Mathematical Subject Classification [?] comes as a tree where usually the leaves are eligible classes. One typical property of classification is the use of codes (notations) to represent the classes, so is, e.g., 14G35 the code for "Modular and Shimura varieties" in the MCS with note "[See also 11F41,11F46, 11G18]" added.

Persons, Corporate Bodies Persons or names of persons, and also corporate bodies, are well-recognised entities in library systems since long; this has not been the case for reference manager applications. It is, however, obvious that they profit as well.

Works, Expressions It has been usual, to varying degrees, to collect manifestations or expressions together which belong to one *work*, so as to simplify the search and facilitate the selection. It has proved even more necessary with on-line catalogues which are less easy to peruse. A work is an optional element in that the average item has no need for it (it could be considered itself work and manifestation in one, without any consequences following from it) and under the control of the user, who groups the items, if the need arises. This replaces functionally the entry of a uniform title.

Missing in the above are user interface elements, like folders or lists, that equally structure the database and group items, but that are not equipped with the machinery, nor have the stability (and cost) of the above mentioned tools.

Equally missing is the venerable concept of an entry type, like *article, proceeding* or even *e-mail*. It is replaced by a far superior scheme, that separates concerns, allows for data entry that is adapted to your needs, and does not arbitrarily restrict you.

2.1.2 The Bibliographical Description

Functionally the bibliographical records could be divided into a the description proper and annotations, logically into a core and extensions, technically into structured and unstructured, i.e., textual parts.

Core A bibliographical record contains minimally some administrative data, and a title[1] more precisely a 'Title and statement of responsibility area' followed optionally by an 'Edition area' (ISBD).

Extended description The old description was tilted towards books, this is nowadays but one of the possibilities. The format allows any number of extended descriptions, to accommodate all needs.

Associations Authors, subject and similar informations are considered entities, thus they are not stored in the bibliographical record, but only a reference is.

Annotations are textual notes (but perhaps also structured *case annotations*) including quotes from the item. – This is a mixed-up class, that could need some further elucidation.

Holdings information refers to the actual location (incl. net and file system addresses) of an item; it can also include a reproduction specification.

2.2 Interfaces

For (i) accessing and (ii) for extending.

2.3 Handling Associations

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[1]A missing title is *missing*, i.e., irregular, not *not applicable*.

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Chapter 3. Preparing to Use Pybliographer

This chapter discusses how to install and configure Pybliographer.
It describes how to do the following:

1. Install Pybliographer.
2. Set up the required database structure
    - Determine which databases to use
    - Define the directory structure or access path
    - Define additional data that you might need
3. Set up Pybliographer for easier operation
4. Load needed data
5. Write local processing routines

Ir also discusses how much detail you will need to record, and which standards you should consider.

3.1   Installing Pybliographer

Note: Before using the information in this section, you should check the latest `Readme` file from the distribution for any changes and additions.

As a rule, Pybliographer installs like any other Linux program under control of your package manager. Only in exceptional cases you will have to consider manual installation.

On a Debian system you use the package name `pybliographer`.So you only need to enter

```
sudo apt-get install pybliographer
```

Note that the libdb3 package will be installed, too. If you want to use Pybliographer together with a relational database, you must install it in addtion to Pybliographer, for more information on using a relational database see below.

The following table gives the dependencies of Pybliographer. [Is this a good idea, after all?] . . .

Intructions for manually installing Pybliographer.. . .

3.1.1   Using a Relational Database with Pybliographer

When yo use Pybliographer with a RDMS, you are in fact using a server process in conjunction with Pybliographer, which is independantly installed, configured and started. As a rule, this server runs under a separate user identity. Please, consult the RDMS documentation for more detailed instructions.

Note: You may want to check the considerations below in this chapter before continuing with initialising the database.

1. assure that the RDMS server is up and running, and that you have any necessary authorisations and informations for its use.
2. Determine the connection to the RBDS
3. Determine the user id
4. Start Pybliographer. Open the **Application/Preferences** dialogue.
5. *or ?* Open the **Application/Database** window and then the **Database/New** dialogue.
6. Enter the connection data, and tick the **Default Database** Check box.
7. Pybliographer checks for an existing infrastructure in the database, as it finds none, it alerts you that the database must be initialised.
8. Click the **OK** button on the message box.
9. The database is initialised.

Note: You may want to check the considerations in this chapter before initialising the database.

3.2   Before Using Pybliographer

Note:

- Give a task oriented overview here –
- Refer to chapers one and two for introduction,
- refer to Part II for details

3.3   Customisation: Codes, Lists, and Schemes

Pybliographer makes use of various lists and data bases of so called *authority data*. See section 1.3 and chapter 10 for a discusion of authority data and the need for it.

In this section we do not address the great authority files for persons, corporate names and the like, but the smaller and lesser ones that deal with codes for languages, genres, realtors et., as follows.

3.4   Customisation: Workforms, Data Entry

With Pybliographer comes a standard list of *work forms* that guide you through the data entry for new records, and that are also used to display records according to their needs.

3.5   Customisation: Import Filters

Pybliographer comes with a standard set of import filters. See 20 for a list and discussion. This list will suffice in most cases for the purpose of occasional import and even when migrating from another system.

When the exporting system has more than one export option available, that can be imported by Pybliographer, the results may not be equal; so you may want to try some tests before settling for one method.

The filters provided are written so as to allow easy customisation, extending or modifying exiting behaviour, by subclassing them. You may profit from this facility in the following situations:

- You want to use a new format, that is a variation of an existing format (have a look at the examples in chapter 20).
- You want to use an extension of an existing format; you may want to make use of the additional information.
- You want to make use of an existing format, but change the processing.
- You want to make use of an existing format, and extend the treatment of the import data. One such situation is given when the standard filter refrains from using some information because it is difficult to map it to the database. You may be in able to improve on this situation, e.g., because you know the context.

3.6   Customisation: Output Formats

3.7   Customisation: External Processors

Chapter 4. Entering Data

This chapter discusses how you enter new data into the Pybliographer database. It describes:

- Sources and classes of bibliographic data

- An example of creating a new record

- Editing (modifying) data

Chapter 5. Searching and Selecting

This chapter describes the steps to search and select items for display and further processing. It shows:

- Possible criteria for searching and selecting

- Ways to display the results

- Ways to set the results apart for further processing or later review

Chapter 6.   Obtaining Output

This chapter discusses output. After an introduction it explains:

- Display output formatting (incl. sorting options)
- Using drag-and-drop
- Fundamentals of bibliographic formatting
- XSLT processor use
- Output formatting choices
- Exporting data

Chapter 7.   Pybliographer External Interfaces

This chapter discusses various interfaces of Pybliographer, including:

- Connections to external databases

- Connections to other Pybliographer databases

- Connections to word processors and editors

- Import and export interfaces

- Internal application programming interface (API)

Part II.   A Guide to Bibliographical Descriptions

Chapter 8. Bibliographical Descriptions

"What can be more easy (those lacking understanding say) having looked at the title-pages than to write down the titles?" But these inexperienced people, who think making an index of their own few books a pleasant task of a week or two, have no conception of the difficulties that rise or realise how carefully each book must be examined when the library numbers myriads of books. In the colossal labour, which exhausts both body and soul, of making into an alphabetical catalogue a multitude of books gathered from every corner of the earth there are many intricate and difficult problems that torture the mind.

(Thomas Hyde, Preface to the Catalogue for the Bodleian Library, 1674)

Note:

- Redundant? Cf. sections 2, 3.2, and 1.3
- This chapter introduces bibliographical descriptions. It discusses:
- Purposes of bibliographical data

    – Descriptive data
    – Organisational data – access points
    – Task related data
    – Access providing data – holdings
    – Content related data – quotes, excerpts and electronic copies

- Authenticity and authority
- Material specific data
- Topical data: persons, works, subjects, classifications
- Lists of languages, genres, and similar

Not unlike other fields of human endeavour, bibliography or cataloguing, as it is called here for short, had needs and purposes at its origin. Maintaining *inventories* of books that one owns, or (more importantly) has the custody of, is certainly the earliest. To this came certainly soon the wish to maintain *directories* of items that one might obtain, such as it happens with the bibliographical references found in a book: they are abstract pointers to the items detailed wheras the library catalogue contains concrete pointers in the form of call numbers.

It is an important trait of bibliographical information to be this kind of *proxy*: Instead of looking over dusty tomes or excavating in the basement of our memory, we push a button and query a database. The same applies to the references that ornate scholarly publications, they serve not only to represent our erudition, but also, ideally, they convey the information needed to find (although not necessary to make good use of) the sources of our wisdom. In this latter case, it is necessarily so that the information must be intelligible and usable for an 'average' reader, so that it no longer suffices to refer the reader to the 'third page of the torn, slightly greyish xerox that is near the end in the second binder on the top shelf, left cabinet',

which is how it works perfectly (and valid) within many author's *episodic memory'*. In the following, the question of purposes and possibilities of bibliographical data is discussed together with some principles that are hopefully able to guide you in deciding upon one's own special system.

8.1 Cataloguing and Annotating

The gathering of descriptive information about bibliographical resources is known as *cataloguing*, and we use this term here although it does not always transport the right connotations, and distinguish it at the same time from *annotating* resources.

The whole second part of this document deals not so much with *how* to do it, but with *what* to do, namely *what* information to collect, where to find it, and in which form to record it. This reflects the importance of content in contrast to the *encoding* of this information (form), an importance that is not always taken into account when discussing these problems.

8.1.1 Formal Cataloguing

8.1.2 Subject Cataloguing

8.1.3 Annotating

8.1.4 Integrating

8.2 Some Principles and Guidelines

It is helpful to state some principles that might direct both programmer and user of bibliographical software (but more generally the cataloguer, regardless of any specific programmatic support). Part of these rules can be considered as *continuity*-rules, meaning that the result (the catalogue entry) should not vary much, if the input (the item, the effort, the knowledge) vary but a little.

8.2.1 Universality [Generality]

The cataloguing applications (rules, tools, etc.) should be usable for all sorts of resources. – This is an important principle that is of rather recent origin. Historically the rules were devised for one specific occasion and institution (only institutions had rules). For library catalogues, cooperative cataloguing, inter-library loan and similar developments lead to a convergence of rules, culminating in the ISBD – but effective only only for classical library materials (books and serials). (The fact that the German rules for non-book materials are somewhat at odds with the reminder, not only weirdly reflects the sociology of the German librarian's profession, but also the fact that they are physically different, shelved apart etc.)

The personal computer changes this all.

- First, the focus has shifted to the desktop – it is the personal bibliographical application that serves to *integrate* the various resources and informations that its user needs,and this is not the program of any institution,
- Second, the computer program requires explicit rules – less can be left to (subconscious) intellectual adjustments; in addition, the interaction with the application stresses what is entered into the computer, and how – little use is made of e.g., of the *episodic memory* that plays so prominent a role in everyday life, and
- Third, the Internet exposes the user to a great deal of variation – and it's the application that must cope with it.

Alltogether, these influences neccissitate an adaptable and multi-faceted description format, as provided by Pybliographer. (This is is true for libraries, too. However the span of materials is even greater in a personal application, I suppose.)

8.2.2 Reliability

This is another principle that only recently became evident,[1] though it underlies unstated the earlier work as well. It has like the following one, efficiency, both a cataloguing and a data retrieval aspect. For cataloguing (describing) it means, that different persons should produce catalogue entries that differ not at all, or only a little. For bibliographical (published) resources this is much easier to define and control, because the items exist in many copies; correspondingly the detail, precision, and ambit of rules for cataloguing published, in particular printed material by far surpass what can be said of rules for unpublished, nmore or less unique materials. Even more this is the case for citation guides, which ignore unpublished sources.

For published resources, there is one guiding principle, namely to stay with what is found on the item and to transcribe it more or less verbatim from the title page, or similarly distinguished places.

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[1]According to Eversberg.

Chapter 9.   Persons, Topics

A Classification of Animals:

- Those that belong to the Ermperor
- Embalmed ones
- Those that are trained
- Suckling pigs
- Mermaids
- Fabulous ones
- Stray dogs
- Those included in the present classification
- Those that tremble as if they were mad
- Innumberable ones
- Those drawn with very fine camelhair brush
- Others
- Those that have just broken a flower vase
- Those that from a long way off look like flies

(Jorge Luis Borges)

This chapter discusses topical information, in particular persons. It explains, among others, the following points:

- Authority files

- Main and variant entries

- The structure of personal names

- The structure of corporate names

- The structure of subject headings

- The structure of work entries

- Multilingual entries

- Distinguishing entries

- Adding descriptive information and notes

Chapter 10. Bibliographical Items

This chapter explains how to formally describe an item. It introduces the areas of a standard bibliographical description and shows how to use them. In particular, it discusses:

- Where to find the information

- What information is requisite

- What information may be useful

- Which forms to use

Chapter 11.   Materials Specific Description

This chapter discusses the requirements of specific classes of materials, such as *music, recordings,* or *electronic files.*

Chapter 12. Multi-level Description

This chapter explains how to use the technique called multi-level description to handle *journals, monograph series, record series, proceedings*, and, generally, *collections* of any type.

Chapter 13.   Adding Access Points

This chapter explains how you can add access points to a record to make it easily retrievable in your database. Among the possible access points are:

- Standard numbers, such as the *International Standard Book Number* (ISBN)

- Control numbers, as used by the Library of Congress to identify records

- Subject headings, classification codes, and uniform titles to gather similar items

- Uncontrolled keywords, and authority files, to cope with spelling variations and the like

- Relations to persons or other items, as in the case of biographies, or reviews

Chapter 14.   Adding Quotes and Notes

After looking at the description proper in chapter 10 and the possible relations of an item in chapters 12 and 13, it is now time to consider information taken from the item itself.

Chapter 15.   Holdings Information

This chapter discusses the use of data that serves to provide access to an item itself, we call it *holdings information*, using the librarian's specific term in a broader sense. This information is used to answer the following questions:

- Which institution (usually library) has a copy

- Where do I find it (exact location, call sign)

- How can I obtain on-line access to the item

- Where did I put the copy that I made

Part III.   User Tasks

Chapter 16. Introduction to User Tasks

This part discusses the major tasks you can perform on your database using the user interface of Pybliographer.

16.1   What tasks can I perform using the Pybliographer user interface?

16.2   How Do I Perform the Task?

In the following chapters, it is usuaally explained to use the graphical user interface to perform the tasks. You may want to explore other ways to perform frequent tasks:

- Customise the user interface to reduce keystrokes
- Extend the database to keep frequently used data in esay reach
- ...

Chapter 17. Setting Preferences

This chapter describes how to change the user preferences that control Pybliographer. The list of all variables is given in XXXX.

Chapter 18. Connecting to a Database

This chapter describes how you can connect to a database to perform operations thereon. Note that you are in most cases connected to a default database when you start Pybliographer. If you want to change this setting, see XXXX.

18.1   Switching Databases

To switch to another database, you select Pybliographer/Database from the Menu, then the wanted database from the list given.

18.2   Adding Databases

To describe another database, you select Pybliographer/Database from the Menu, and then Database/New.

Chapter 19. Creating Records

This chapter describes how you create a new record. It explains:

- Selection of entry mask

- Presetting and defaulting fields

- Using completion and index look-up

- Adding references semi-automatically

Chapter 20. Importing Records

This chapter describes how to import records from an external source.

Format	Description
MedlineOld	Old Medline
Isi	ISI downlowd format, also known as BIDS
MARC21	Used by most Anglo-Saxon libraries
Unimarc	International exchange format
MAB2	German format
BibTeX	classical Unix format
Refer	another format
Ovid	yet another format
Allegro	German format
Endnote	commercial reference manager format ...

Table 20.1.: Import filter provided by Pybliographer

Chapter 21.   Modifying Records

This chapter describes how to modify records, either those that are already in the database, or temporary ones that are in the process of being created or imported.

- You can edit a record, in most cases, by simply displaying it and changing the data in the entry mask

- In some cases, you will have to switch to another view or to display another object

- Often, however, it will be better to use programatic means, such as search and replace.

- Special considerations apply if you want to change associations between records, i.e., to correct the association between a work and a person.

Chapter 22.   Selecting Records

This chapter describes the various ways to select one or more records and submit them for processing. Included are discussions of how to store and modify lists of items, and how to organise their processing.

Chapter 23. Specifying Output Formats

This chapter describes how to use Pybliographer dialogues to select output formatting ooptions.

Chapter 24.   Output Processing

This chapter describes how you can:

- Generate reference lists and bibliographies for documents

- Generate structured and annoteted bibliographies

- Produce output for Web-presentation

- Produce work-lists and summaries

Part IV. The Application Programming Interface

Chapter 25. Scripting and Extending Pybliographer

This chapter introduces the issues of extending and scripting Pybliographer.

Note:

- Where do we put the information how to create an index?

Chapter 26.   Data Types

This chapter explains the major data types that yb uses.

Chapter 27. Controlling Pybliographer

This chapter describes the control classes and objects and the flow of processing in Pybliographer.

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Chapter 28. Domain Objects

This chapter describes the major objects and classes in the application domain.

Chapter 29. Storage Component

Chapter 30.   Programming the Graphical User Interface

Chapter 31. Programming the Import Interface

Chapter 32.   SQL Considerations

Chapter 33. XML Considerations

Part V. Appendices

Chapter A.   Migration

Glossary

Access point

Any name, word or other designation under which a record can be found. Typically the name of the author and the title. The determination of access points has been crucial, both for the cataloguer and for the principal, as for every access point a catalogue card was needed. At a first glance, this concept has lost its importance with the advent of online catalogues, as now easily every field can be searched, but that is not (quite) the case.

See also: Heading

Added entry

In the times of the card catalogue, a second card that was filed at a different place, e.g., for the title, or for a collaborator. With online catalogues this question is moot but returns as one of suitably determining access points.

See also: Main entry

Alternative title The second part of a title proper that is given as an alternative by the copula 'or' or its equivalents as in The tempest, or, The enchanted island

analytic

In the field of bibliography (so called library science), one calls analytic a description or record for a work that is contained in another bibliographic unit, i.e., an article that is published in a (volume of a) journal and not as an individual physical unit. In German, one speaks of publications that are (un)selbstständig, (in)dependant.

Analytic description is usually considered the province of database services, not of the library system, so the cataloguing rules and standards mostly ignore this topic.

See also: Collection, Monograph

Anglo-American Cataloguing Rules (second edition, revised) CR2R

See also: RAK

autopsy, autoptic Description based upon one's own observation (book in hand). Also called primary (of a bibliography).

Bibliography

The collection of descriptive information about all publications that fall under a certain delimination. For example, for a national bibliography one records all books (and certain non-books) published during a year in a given state, etc. Also the result of this collection, published as journal or year book, or as a, say national bibliographic data base.

A list of books, articles etc. given in a publication for reference purposes, but also (without clear demarcation) to assist in the study of a specific subject.

Generally a data base of descriptive information about documents and sometimes other items.

The field and practice of describing books *See also:* Cataloguing

Book

Defined as "non-periodical literary publication containing forty-nine or more pages, not counting covers." A pamphlet has less than 49 pages, a broadside or printed sheet is printed upon on only one side and usuaally destined to be posted. Often called **monographic** .

See also: Journal, serial, series, non-book materials

Classifier

A generic (sub-)heading.

See also: Heading

ConferenceA periodic or non-periodic meeting devoted to the discussion of one subject; often assimilated to a corporate body. (Difficult rules!)

Corporate bodyA collective that acts under its own name (independant of its legal state). Familes and conferences are more or less assimilated. So this comprises everything but individuals if either producing or being subject matter of a document.

Dates associated with an item.

In the publication statement the year of publication is given; today often instead (or in addition) the copyright year, which is preceded according to AACR practice with a small c.

There are other dates that are of importance, if only in special cases. the most important class associates the item with an event: the promulgation of a law, the signing of a treaty, the convening of a congress, the formal revision of a technical document and so on.

Dates are as well associated (as distinguishing marks) with persons, or other items, and form part of, or define historical subjects.

See also: subject headings; persons;

Document

Perhaps a less specific term than book, publication, and less colourless than item? Specifically a publication that is accessible through the system, an electronic resource.

See also: Resource

Expression

An equivalence class of **manifestations** , which share certain characteristic dependencies.

Examples are translations of a work, that are traditonally equipped with an **uniform title** composed of the uniform title of the original work and a language indication: Shakespeare, William: Othello <ger.>

Other common cases are pieces of music which can be expressed as scores or recorded performances, etc.

See also: Work

See also: Manifestation

See also: Heading

Folder

A subset of a database. An item may be in several folders, at the same time. A folder may contain either items or folders (?).

For an example look at Biblioscope.

Format

General material designation (MARC 245.h) [GMD]

"A generic term used to identify the general category of material to which an item belongs and to distinguish one general category from another in a catalog containing records for more than one type of material" (Maxwell's Hdb. AACR2R, p.23)

In our use this is a **Classifier** .

Imprint*Publication Statement*
International Standard for Bibliographical Description   **[ISBD]**
See also: AACR2R, PI, RAK

Journal

AACR ?

A collection of articles by more than one author that appears in multiple volumes without planned extent and at regular intervals.

Distinguished from a series by the individual volumes being collections.
See also: Series, Collection, Integrating ressources

Person

An individual (or whoever appears to be an individual, Nicholas Bourbaki, say). There are two ways to handle persons in bibliography, as individuals or as names. For searching, the latter is usually sufficient, so this the German usage until the present. The American usage is informed by the idea of the dictionary catalogue, where works about an author are listed next to works by him, requiring the use of individualised entries from early on.

No rules without exception. If there is insufficient information (or interest) one may eschew the work needed for determining the correct author entry; on the other hand, for the purpose of subject headings, one buildt a German authority file, too; with funnily different rules.
See also: Collective person
Publication

The preparation (e.g. typesetting), manufacture and distribution of copies of an item (manifestation). Generally done by a separate commercial entity, the publisher. For items that are not conventionnally printed, this is rapidly becoming a problematic notion. For material that is not somehow manufactured, but, say only made available as a computer file, the notion is fundamentally flawed, it appears.
Publication Statement Contains place of publication, publisher, date (i.e., year) of publication. Required for published materials. Also called Imprint.
Publisher

Someone who manufactures and distributes copies of an item (manifestation). ISBD and MARC allow for a printer in place of or addition to the publisher.

Regeln für die Alphabetische Katalogisierung   **[RAK]**

The newer German Rules (replacing the Preußischen Instruktionen), developed around 1970 under the marked influence of the ISBD. There are two sets of fundamental rules, RAK-ÖB and RAK-WB, for the public and academic libraries, resp. together with special rules (sometimes quite inconsistent) developed over the years for non-book materials etc.
Reproduction

A secondary copy of a **manifestation** .
Reproduction Note

A note that contains information about a **reproduction** – pertains to a holding record.
MARC XXXX cf. dicussion there.

Topic (class)

Super class of (at least) Persons and Subject headings.

Topics have (generally multiple) names and are related to each other and to bibliographical records.

See also: Bibliographical record; Person(class)

Topic map

An evolving standard (ISO 13250) for the representation of semantic nets. (?).

See also: RDF

Uniform title

A **heading** that is used to **collocate** all **manifestations** of a **work** , or as **collective uniform title** , all (subclasses of) collections by an author. Compares to * **GMD** and German FST. Generalisation: **Classifier** .

See also: title

Work

An equivalence class of **manifestations** – an individual intellectual creation, an original work.

This is typically represented by a **uniform title** .

See also: Expression

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