

Books for Mac OS X

A User's Manual

November 2004

Introduction

Description

Books for MacOS X is a native Cocoa application that is intended to assist users with the tasks of cataloging and managing a personal library.

Unlike other cataloging applications on MacOS X, Books was written with the bibliophile in mind. Books includes functionality that allows the bibliophile to quickly and easily manage their libraries and Books attempts to make this task easier by including support for a wide number of online sources for book information, supporting a variety of import and export options that target other applications and devices, and including features such as managing lending histories and electronic files associated with particular books.

Books is an open-source application and is available online for no cost at

<http://books.aetherial.net/>

Being open-source, users and developers are invited to use the source code to improve Books, customize their own versions of Books, and use some of the experience gained while writing Books to write and improve bibliographic applications of their own. For more details, please see the Licensing section of this document.

Features

Books is intended to assist the bibliophile in creating and maintaining an electronic record of their book collections. In order to accomplish this goal, Books supports the following features:

- A multi-tabbed display for providing a simple and efficient interface to book information.

- A completely open XML-based file format and numerous export formats, including text, XML, and HTML. Furthermore, Books supports the export of data to devices such as modern cellular phones and the Apple iPod.

- A set of import options targeting generic data formats such as XML and text, and a number of import formats targeting other library management software packages such as Readerware and Endnote.

- The ability to connect to libraries worldwide in order to retrieve information about books from around the world. Books supports retrieving data from Amazon, but it also includes a Z39.50-based search client that is able to connect to libraries and research institutions around the world. New book data sources are added to Books weekly.

- Support for common barcode readers.

A simple interface for managing the lending history of a book.

An interface that allows users to attach files to particular book entries that can be transferred and retrieved at a later date.

A number of translations (including Spanish, Russian, Chinese, and German) from around the world and a global user base.

An open-source code base and demanding user community that is continually suggesting and refining new features.

Relevance

This document is current as of Books version 2.2.0. It should remain largely relevant with respect to later versions, though the specifics may vary.

Installation / Removal

Installation

Books can be installed or updated by following these steps:

1. Download the latest release of Books from
<http://books.aetherial.net/>
2. After the disk image downloads and mounts, the user will be presented with the GPL licensing terms. Read and accept the terms and the image will be mounted as a local filesystem.
3. From the DMG filesystem, copy Books to your Applications folder (or other folder that may be appropriate).
4. Launch Books from the Applications folder and review the preferences. Save the preferences and begin using Books.

Removal

Books can be removed by simply dragging the application from the Applications folder to the Trash. No other actions are required.

Getting Started

Upon starting Books, the first screen that will be presented to the user (after setting initial preferences) is the Browse pane. This pane provides a searchable and sortable list of books in the collection. Initially, this list will be empty. In order to create a

new book record in the collection, click the “New Book” icon in the toolbar. A new book record will be inserted into the collection with the title “New Book”. The details of the book may be entered manually, or an ISBN number may be entered and the “Fill” button pushed to retrieve information from the Internet.

For example, a sample session:

1. Start Books.
2. From the Browse pane, click “New Book” from the toolbar.
3. At the Basic Details pane, enter “0380977427” into the ISBN fill.
4. Verify that “Amazon USA” is selected in the upper-right corner and press the “Fill” button.
5. It may take a moment, but the book details downloaded from Amazon should correspond with Neal Stephenson’s “Quicksilver”.

Congratulations, you have just entered your first book into Books!

The Books GUI Explained

The Books graphic user interface (GUI) is divided into different tabbed sections that organizes and separates some of the functionality and data. In addition to the tabs in the main window, the preferences pane and toolbar are core elements in the Books GUI. These respective portions of the GUI are described and explained below.

Preferences

The Books preferences pane can be accessed via the menubar (under Books, Preferences...) or the optional toolbar item. When the preferences are accessed, a window will slide down from the title with a pane that contains the options for Books. The top of the window will contain a set of links that can be used to skip to particular sections of the preference pane.

The Browsing Options section contains a list of field names and checkboxes. This is used to set the fields that are visible in the table view in the Browse tab in the main window. Items that are checked will appear while unchecked items will not. Initially setting these items will set up the table view. The ordering of these items in the table view is set by clicking and dragging the columns in the Browse tab. Beneath the field names is a setting for “Row Height”. This sets the height of the rows in the Browse table view. If cover images are not important, it may make more sense to set this value to a lower value, such as 32 pixels. If viewing cover images is important, higher values between 64 and 128 pixels will enlarge the cover images in the Browse table view. Finally, there is an option to enlarge cover images in the Basic Details tab when the images associated with a book entry is smaller than the image well in the Basic Details pane. Be warned that enlarging an image beyond its original size will result in visual distortion of the image due to the rescaling.

The Date Options section is used to set the format of the dates used throughout Books. These strings are the same format used by the Cocoa framework and a link to a link is included on the preferences pane that will retrieve a detailed explanation.

Please Note: All instances of dates within Books are actual full dates. This means that every instance of a date not only includes the month, year, and day – it also includes hours, minutes and seconds. Some confusion is encountered when using less-specific date information with more precise formats. For example, if you enter only a year as a publication date, Books will attempt to guess the missing components, including the day and month. If a date format is used that exposes days and months, simply entering a year will result in a displayed date that includes the current month and day of the current month. Thus, if today is June 3, and a date format is used that includes day and month in addition year, and 1979 is entered as the year, the newly entered date will appear as June 3, 1979. While this may seem odd and counterintuitive, the reason for implementing date storage using full date types is that using date types instead of simpler types (such as strings) allows Books to use dates more intelligently with respect to display, localization, and storage. (Example: If your collection is sent to a Spanish speaker, the dates will appear in Spanish, and the recipient can sort those items by date.)

The Regional Options section is used to set the preferred websites to view entries online (in a web browser) and to set the preferred source for book information. The “Preferred Website” option is used with the “View Online” functionality and the “Preferred Autofill Database” is used with the “Fill” functionality. Furthermore, an option to download images and cover art is provided, should a user not want to download cover images when available.

The Image Options section is used to set the maximum size and format of the cover images. Images that are larger than the maximum width and height are resized to fit in box bounded by these properties. The Image File Format is used to specify in which format images should be stored. Storing cover images as JPEG images will result in smaller collection sizes, but some quality will be lost due to JPEG compression. PNG and TIFF images are ideal for saving images without losing quality, but they enlarge the size of the collection files. GIF support is provided for legacy reasons.

Please Note: Setting large values for maximum width and height will result in much larger collection files with higher quality images. Lower values will result in smaller files with reduced image quality. If quality of cover images is the dominant concern, use larger height and width values. If file size is the dominant concern, use smaller values.

Finally, the Misc. Options section allows users to set other options for Books. “Enable audible feedback” will turn on audible alerts whenever an action is occurring that requires user attention. “Use AddressBook for names” will populate lists such as lender and borrower in the “Lending Details” section with entries from the system address book. “Check for updates when starting Books” will enable the program to determine if a newer version of Books has been released and is ready for download.

Toolbar

The Books toolbar by default consists of the “New Book”, “Previous Book”, “Next Book”, “Delete Book”, “Print”, “View Online”, “Preferences”, and “Autofill

Database” items. Users can customize the arrangement and size of these items by right-clicking (or control-clicking) on the toolbar while Books is running. A small pop-up menu will appear that will allow the user to choose the ways to customize the toolbar. This uses the standard MacOS X conventions for toolbars.

The “New Book” item is used to create a new empty book record in the collection. By default, it uses the title “New Book” with the rest of the fields left empty. The “Next Book” and “Previous Book” items are navigational and are used to navigate forwards or backwards in the list displayed in the Browse table view. Note that the order of the navigation may change, should the user decide to resort the list of records in the Browse table view. “Delete Book” removes a record (or records) from the list after asking for user confirmation. “Print” brings up the standard print dialog. (See more below on printing.) “View Online” attempts to bring up a web page in the system web browser using the ISBN number of the currently selected book as a key. The “Preferences” item brings up the preferences pane, and the “Autofill Database” item allows a user to quickly select the source to use for retrieving book information without having to bring up the preferences pane.

Browse

The Browse tab is used to view a list of records in a collection, sort, and search those records. The Browse pane consists of two main elements: the table view and the search field.

The table view displays records in rows, with particular fields occupying the columns. This list can be unsorted and some columns may be empty of value. In order to sort a column, clicking on the header once will sort it in ascending order, while clicking it again will sort the list in descending order. Columns can be rearranged by clicking on the column header and by dragging the column to the desired destination. Clicking on a record will highlight its row, while double clicking it will bring up the Basic Details page for that record. To delete a book, click a record and click the “Delete Book” item in the toolbar. To delete multiple records, click to highlight the initial record and use the Shift and Command keys with clicking to select multiple records.

To edit the values of multiple books, select the books to be edited en masse using the same method as selecting the books to be deleted. Instead of clicking delete, select the Basic Details or Extended Details tabs and enter information in the empty fields that are to be altered. To selectively export records using the export functionality, the same multiple selection is used. (See more in the exporting details below.)

The second element of the Browse section is the search box. The search box is used to filter the list of records to a list that matches the search criteria. If no columns are selected when a search is entered, Books will search all records’ fields that are visible in the table view. If a search is to be restricted to a single field, select the field by clicking the table header and enter the search. Using the Shift and Command keys, multiple fields may also be selected. The search box remembers the last few searches and is able to clear that list by selecting “Clear” from the search box menu. A search can be cancelled by clicking the close icon that appears to the right of the search box.

Basic Details

The Basic Details tab is one of two tabs that display field values for a given record. If no record is selected in the Browse tab, these fields will be empty and unselectable. If multiple records are selected, the fields will also be empty, but values may be entered for the selected books by entering data into the empty fields.

In addition to the text fields, the Browse field features an image well for cover images. Cover images may be retrieved via online autofill or image files can be dragged into the well. If the preference to enlarge images has been set, Books will enlarge the image to fill the well.

Below the cover image well is a field for entering an ISBN number. To the right of the ISBN field is a button labeled "Fill". If a valid ISBN number is present and that number is in the chosen autofill database, then Books will fill in the missing available data. (That is, only empty fields will be filled.) In the case of the Library of Congress source, Books will also look for a valid Library of Congress Control Number in the field directly above the ISBN field.

Extended Details

The Extended Details tab is similar to the Basic Details tab in that it contains a collection of fields for the currently selected book record. Like in the Basic Details tab, this tab contains date fields. These fields follow the formatting set previously in the preferences pane.

Lending Records

The Lending Details tab is used to track a lending history of a particular book. The upper half of the tab is used to display and enter instances of a book being borrowed or lent out. The bottom table is used to display the different times the book has been borrowed. To add a record to the list, simply enter the details in the text fields above the table, and click "Save Record" to add to the list. To retrieve older records, simply click the record from the list and the details will appear in the fields above. Preexisting records can be altered or deleted with the "Save Record" and "Delete Record" buttons.

Files

Books includes an innovative feature within the Files tab. Within Books, it is possible for users to attach arbitrary files to their book records that are saved with the records and can be transported as simply as sending another a .books file. This may be used to store e-books, reading notes, or additional images and text.

The Files tab is broken up into two main areas. The top table is a listing of the files currently attached to the book record. A file may be viewed by selecting the desired file and clicking the "Launch" button. Alternatively, a file may be deleted from the list by selecting the file and clicking the "Delete" button.

New files may be added by using the bottom portion of the Files tab. The first step to add a file is to select the "Browse" button and locate the file on the local

filesystem. The title may be changed to be more descriptive and additional notes may be made in the description field. Once the data is satisfactorily entered, clicking the “Save” button will add the file to the book record and the book collection.

Note: Launched files are copied to the “/tmp/” folder and launched from there. Files originating from Books are prefixed with “Books-File”.

Printing

The Books printing engine is based upon Apple’s WebCore technology. Presently it simply prints a list of books selected in the Browse table and the columns that are visible in that table. That is, if title, author, and publisher are visible in the Browse pane, Books will print out those values of selected books. If all books are to be printed, simply deselect any books in the Browse table so that no books are selected or highlighted.

Since the Books printing engine is based upon Apple’s WebCore technology, it will continue to grow and evolve as the WebCore rendering engine supports more standards and options, such as the WC3’s Cascading Style Sheets, revision 3 with additional options for pagination.

Autofill

A large portion of Books utility is implemented within its autofill engine. Simply put, autofill is a way for owners of books to retrieve and save data about particular books from worldwide databases such as Amazon, the Library of Congress, and any number of national and university libraries. The sources typically provide information about the title and authors, but some sources include additional information such as cataloging data, textual descriptions, page numbers, and cover images. The data provided varies by source, so experiment with local and remote sources to find the optimum combination for a set of books.

The Books autofill engine originally used Amazon’s XML API’s to access Amazon’s database and retrieve book data. This allowed Books to retrieve data for books in print and on sale in the United States, Great Britain, Germany, and Japan. Because of an increase in demand for sources that supported out-of-print books and books from places not covered by Amazon, the Books autofill engine was improved to support Z39.50 sources in addition to Amazon. This has made Books a first-class client amongst other bibliographic software such as Endnote.

If you are a user in an area not covered by any of the current Books autofill sources, chances are that there is a source that can be added to Books in order to provide data for local books. If you are interested in helping find and test new sources of data, send an e-mail to

books@aetherial.net

The process is as simple as finding a local authoritative library from a list and providing some ISBN or other cataloging numbers to use in testing.

Single Book Autofill

The simplest way to use the Books autofill functionality is to simply enter an ISBN number in the ISBN field in the Basic Details tab and click the neighboring “Fill” button. This will send a query to the selected source and attempt to retrieve book information. If the retrieval is successful, new data will appear in the other fields in the Basic Details and Extended Details tabs. If the retrieval fails, a message will appear stating that the fill request has failed.

If the selected source does not contain the book information, another source may be tried. The selected source can be changed in the preferences, or it can be changed via the pulldown menu in the toolbar. If the pulldown menu is not visible, the Books window may need to be enlarged and the toolbar customized. (Please review the Toolbars section above for details about the toolbar and customization.) Once the new source is selected, simply click the “Fill” button again to search for the book. This process may be repeated as many necessary until the data is located or there are no more sources to search.

Note: With the exception of titles containing the text “New Book”, the autofill engine will not overwrite previously entered values. If new values are desired, first delete the values in the fields, then use the “Fill” button.

Batch ISBN Autofill

Entering books one at a time via the Basic Details tab can be slow and inefficient. With that in mind, the Batch ISBN Autofill option was provided to expedite the process of adding new books and retrieving the book’s data in an quick and efficient way. To use this functionality, select Batch ISBN Autofill from the Import menu under the main File menu. A window with an empty text box will appear. Books can be added by typing or scanning ISBN, UPC, or other identifiers into that box, one identifier per line.

After creating a list of identifiers, click the “Import” button. Books will display a message showing the process of the import. After the import is complete, books that had data successfully retrieved will be added to the current collection, while the identifiers that failed to retrieve any data will be shown to the user. These identifiers may be copied elsewhere for later investigation, or copied back into the Batch ISBN Autofill after selecting another source to search.

Fill Missing Data From Online Source

Under the “View” menu, an option labeled “Fill Missing Data From Online Source” is provided. This menu will attempt to locate additional information in the selected autofill source for the currently selected books. If no books are selected, it will attempt to locate data for all of the books from the selected source.

Troubleshooting Autofill

In some cases, Books will experience slowness or difficulties with retrieving data online. Since all of these sources are online, they are susceptible to problems such as network issues, slow servers, the occasionally malformed data. However, if problems

persist, please send the title of the book that is experiencing problems, its ISBN number, and the source being used to books@aetherial.net.

Importing From Other Files and Applications

In addition to support for online sources of data, Books also supports a range of file formats that can be parsed for book information. These files may originate from other cataloging applications or they may be generated in other ways, like the tab-delimited text import. For most of these formats, simply selecting the type of file to import from the Import menu under the File menu and selecting the file from the local file systems can retrieve data. New books will appear in the collection if the import is successful, a message about failure will appear if the file is invalid or cannot be parsed properly.

Tab-Delimited Text Import

A common type of file for importing data from custom databases in applications such as FileMaker Pro is the tab-delimited text type. This type is relatively simple. In the first row, the names of the fields are present. In the following rows, the values for those fields are in the same position with respect to the tab delimiters as the field names.

A book collection with two books named "Book 1" and "Book 2" would be contained in a tab-delimited file that looked something like this:

```
Author<tab>Title<tab>ISBN<tab>...  
Author 1<tab>Book 1<tab>1234567890<tab>...  
Author 2<tab>Book 2<tab>1234567789<tab>...  
...
```

To import data from another source, the tab-delimited file must support this format. For some files, it's as simple as adding the additional initial row with field names. For others, it can be a bit more complicated.

One approach for importing data from other sources supporting tab-delimited text file exporting:

1. Open Books and add two or three books with values in the fields that you would like to populate from your other source.
2. Export that file as tab-delimited text.
3. Open that text file in a spreadsheet, such as Excel.
4. Open the other tab-delimited text file in Excel.
5. Copy the columns from the source file to the Books-exported file. Copy the titles from the source to the column under "Title" in the Books exported file, and so forth.
6. Save the tab-delimited text file and review it for correctness - Title values

are under the column containing "Title" and so forth.

7. Import the file into Books.

If this approach does not work for you, be sure that your tab-delimited file is formatted properly and encoded using UTF-8.

Export Options

In addition to importing files of different types, Books is also capable of exporting collection data in different forms. Some of these forms may be files that can be read by other applications, while other forms may be direct exports into existing applications and devices.

Just like in the printing, Books will export the currently selected books in the Browse tab to each of the formats below. In order to export all records in a collection, either select all records or select none. Furthermore, in some of the export options, choices about which fields to export and in what order are provided.

BibTeX

BibTeX is a popular standard in the academic and bibliographic communities. It is used to encode lists of references that are used by popular typesetting applications for writing serious papers. Books will export record data as a list of references that can be used in BibTeX-aware applications.

Books 1.x XML

This format is used to provide compatibility with the older versions of Books. Books prior to 2.0 used a specialized XML format that encoded all data, save cover images, in a single XML file. This export option can be used to export XML files that can be read by older versions of Books.

Books Database

This format is almost identical to the "Save As" functionality in that it exports a valid .books file for use with Books. The only difference between "Save As" and this export option is that this option allows users to select subsets of a collection to export.

Books ME JAR

The Books ME JAR export is a new option that allows Books to build and export a Java 2 Micro Edition executable to devices such as personal digital assistants and cell phones. This option builds a small program embedded with book data that can be used on these mobile platforms. In addition to exporting data, it also includes a small Amazon client that can be used to lookup ISBN numbers on the device. This feature is useful when comparison shopping in bricks and mortar establishments.

Cover Images

This option will export a folder filled with cover images.

E-Mail Message

This option will create an e-mail message and attach .book files to that message that can be sent to others. People receiving the message can simply click the attachments to have the data imported into their book collections.

iCal Calendar

This option will export date-related information into a user's iCal application. This will create a new calendar and populate the calendar with information such as publication dates and lending and borrowing dates. These calendars can be published and synced like any other iCal calendars.

iPod Text Files

This option creates a folder full of text files that can be imported into iPods supporting notes. This will create an index file with a listing of the book and the index links to individual files containing the book information. This export is suitable for building lists of books that can be browsed within the iPod.

HTML

This option can be used to quickly generate websites containing book information. Similar to the iPod export, it generates an index page with the books listed and more detailed pages for each book.

The control of the formatting of these pages is controlled via the use of cascading style sheets. In addition to the default style exported by the application (styles.css), three other styles are also exported. To use these other styles, simply rename styles.css to something like styles-old.css and rename the desired stylesheet file to styles.css. modern.css provides a more modern look and feel, bookstore.css provides something a little more antique, while bofh.css is a homage to the "Bastard Operator From Hell" series that provides a text-based old school terminal look and feel.

To control the display of fields and elements within the pages, customization of the stylesheet is required. For example, if the browser warning is to be suppressed, adding

```
display: none;
```

To the block of code under div.browserWarning section would suppress the message under CSS2-compliant web browsers.

If a more custom look and feel is desired, entirely new stylesheets can be created and used in place of styles.css. Please review the format of the index and individual book HTML files to obtain the structure of the HTML and CSS documents.

Flash Viewer

In addition to the HTML export an experimental Flash-based book browser is available at

http://books.aetherial.net/2004/06/flashviewer_10.html

Note that instead of placing HTML files online, a copy of a .books file is placed online and the Flash viewer is embedded in a page pointing to the location of the .books file. Also note that the .books file must have the cover images within saved as JPG files.

RTF Text File

This option exports a standard Rich-Text Format file that can be manipulated and used like any other RTF file. Note that RTF experiences problems with non-Latin character sets (such as Japanese) and may be unsuitable for use with other alphabets.

Tab-Delimited Text

This option exports a tab-delimited text file as described in the importing section above. This export is useful for use in spreadsheets and other applications.

XML

This option exports an XML file that contains all of the book information, save cover images. This format is intended for advanced users who are comfortable with XML and related technologies. For instance, a savvy user could export book data as XML and use XSL stylesheets to transform the output into database statements, HTML pages, or PDF files.

Books Translations

One of the goals of Books is that anyone in the world could download the application and begin using it in their native tongue and be able to work with their local book collections, regardless of where the user is located and where the books originated. That said, translating Books into new languages is a priority, as is finding suitable resources such as autofill databases that are also locally useful.

At the time of this writing, Books is available in eleven languages and supports at least fourteen sources around the world for book information.

If you are interested in helping to translate Books, the process is straightforward and no technical expertise is necessary. If you can read and check e-mail, you can probably translate Books. For more information, send an e-mail to

books@aetherial.net

I welcome all interest and help in this endeavor.

Future Directions

To be written...

Troubleshooting

Occasionally, problems will occur when using Books. These problems could be due to problems with remote databases, problems with the local system, and even (often) stupid programmer errors. If you are experiencing problems with Books, be sure to visit the Books weblog at

<http://books.aetherial.net/>

to discover if others are experiencing similar problems or updates and fixes have been posted. If the problems persist, all feedback and bug reports are welcome at

books@aetherial.net

Since Books is an open-source project that is done in free time and with no development resources, its users drive improvements and fixes in the application. If no one reports bugs or other problems, chances are that they will not be fixed. Many, many users have contributed feedback to bring Books to its current state, giving back to those users by submitting bug reports or suggestions in one easy way to give back and say thanks.

Credits

To be written...

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Thank you for your interest in Books.