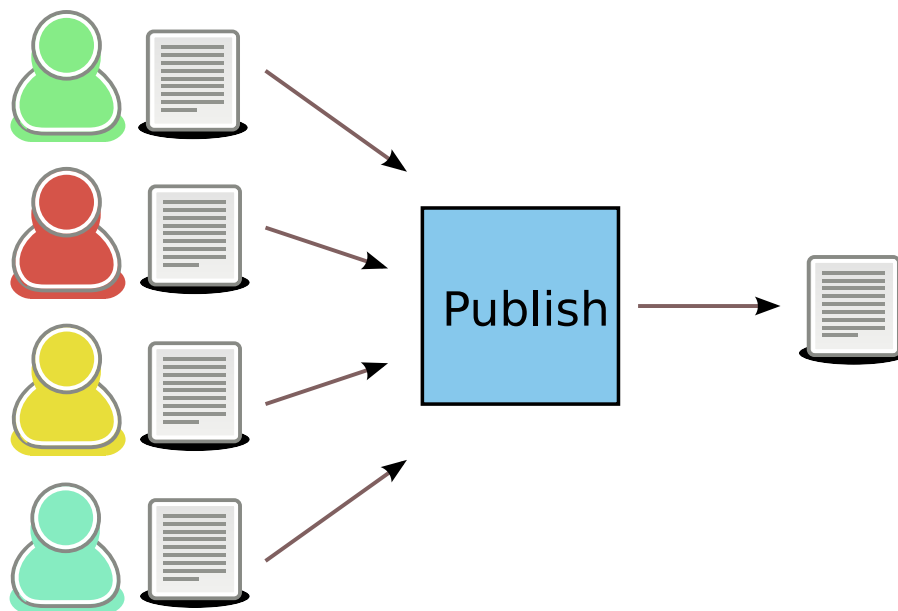


Publish User Manual

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Chapter 1

Introduction

Researchers and research institutions are faced with an increasing demand for demonstrating their productivity, for example when applying for funding. Demonstrating productivity means preparing publication records, for inclusion in a CV, on a web page, or in an annual report. Preparing such publication records is time-consuming and error-prone, in particular when a large number of publications must be presented in a uniform manner.

The bibliographic reference system **Publish** solves this. Publication records (in for example BibTeX format) from a large number of researchers or departments may be imported into a common database, validated against a list of known venues (journal and conference names), checked for duplicate entries and common typos. Publication records may then be categorized and generated, in BibTeX, L^AT_EX, or PDF format.

The database is maintained as a simple text file which may be easily edited using any text editor.

This manual describes the command-line interface of **Publish**. In addition, a programmer's interface is provided in the form of a Python module. For documentation of the Python interface, refer to the Python help system¹.

¹`help(publish)`

Chapter 2

Overview

Publish handles the following three basic tasks: importing, validating, and exporting papers. We discuss these briefly below and return to discuss each of them in the following chapters.

2.1 Importing Papers

When importing a list of papers, they end up in a publication database stored as a simple text file. The file is stored in the current working directory and is named `papers.pub`. When new data is imported into the database, both the database and the imported data are validated. The two lists of papers are subsequently merged (with check for duplicates) and stored back to the database, as illustrated in Figure 2.1.

For more details, see Chapter 4.

Import

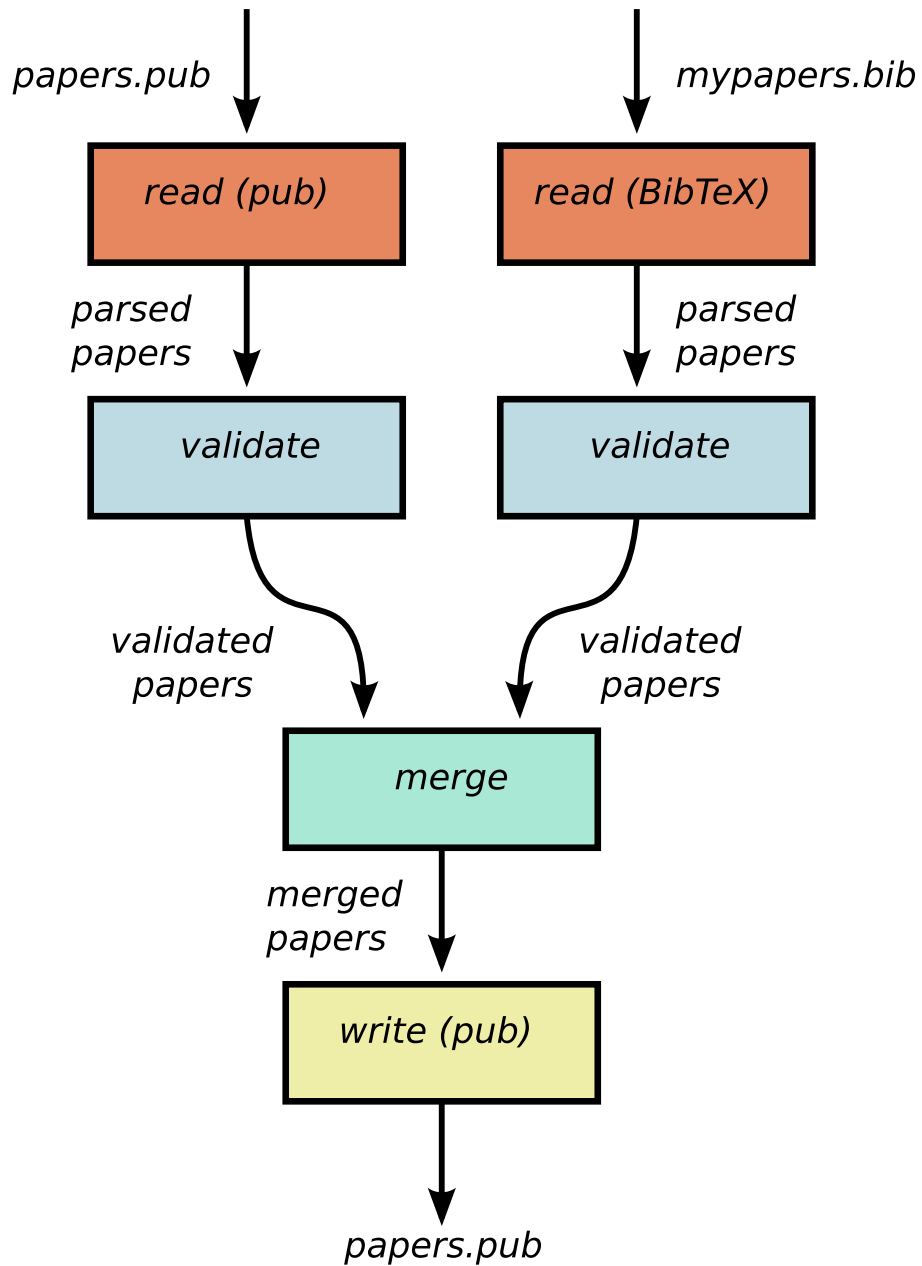


Figure 2.1: Importing papers.

2.2 Validating Papers

After data has been imported into the database, it is possible to validate the database for errors. Validation happens automatically when data is imported, so this feature is mostly relevant when the database file is edited directly. A schematic overview of the validation process is given in Figure 2.2.

For more details, see Chapter 5.

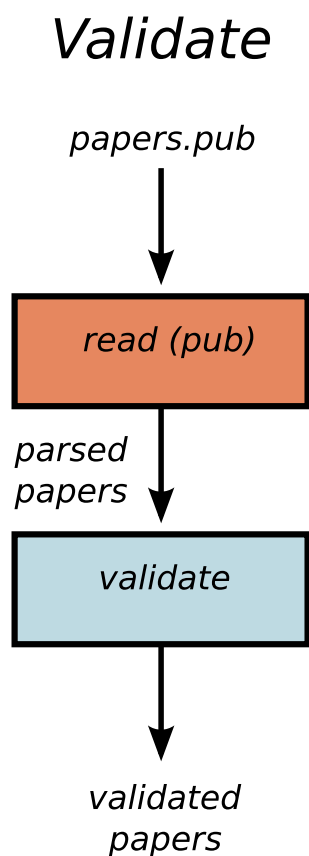


Figure 2.2: Validating papers.

2.3 Exporting Papers

Publication records may be exported from the database in one of the following formats: `pub`, BibTeX, L^AT_EX, or PDF. The user may also specify a filter to export a subset of the papers in the database, for example all papers in a specific category or from a specific year. During export, all papers are first read from the database, then validated, then filtered, and then formatted, as illustrated in Figure 2.3.

For more details, see Chapter 6.

2.4 The `pub` Format

The system uses its own format for storage of the papers. The format is designed to allow simple editing¹ and looks as follows:

```
* category
** title
    attribute: value
    attribute: value
    ...
** title
    attribute: value
    attribute: value
    ...
* category
    ...
```

See Appendix C for more information about the `pub` format.

¹The format is based on the Emacs Org-Mode. Database files may thus be conveniently edited using the Org-Mode, see Appendix B.

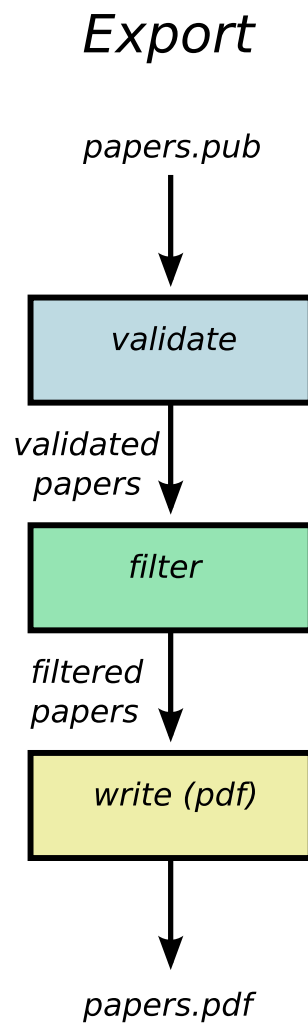


Figure 2.3: Exporting papers.

The papers imported into the system will end up in one of 12 categories, see Table 2.1. When exported to PDF or HTML², they will be put under the matching headline.

Category	Headline
articles	Articles in International Journals
books	Books
edited	Edited Books
chapters	Chapters in Books
refproceedings	Refereed Proceedings
proceedings	Conference Proceedings
reports	Technical Reports
manuals	Manuals
theses	Theses
courses	Courses
talks	Talks
misc	Other Publications

Table 2.1: Paper categories and headlines.

Which category is assigned to a paper depends on what BibTeX entry-type the paper has, or, alternatively, the category specified by the user when importing papers.

As can be seen in table 2.2, some categories match several entry-types, and some entry-types match several categories. **Publish** implements some simple rules to deduce which category should be assigned to any given paper with known BibTeX entry-type. This is discussed in more detail in Chapter 4.

²HTML-output is not implemented in version 1.0

Category	BibTeX entry-type
articles	article
books	book
edited	book, proceedings
chapters	inbook
proceedings	inproceedings, conference
reports	techreport
manuals	manual
theses	phdthesis, mastersthesis
courses, talks, misc	misc
not supported	booklet, incollection, unpublished

Table 2.2: Paper categories and corresponding BibTeX entry-types.

Chapter 3

Basic Usage

This chapter contains installation instructions. It also contains basic information on how to use the command-line interface.

3.1 Installation

Publish follows the standard installation procedure for Python packages. Enter the source directory of **Publish** and issue the following command:

```
# sudo python setup.py install
```

See Appendix [A](#) for a more detailed description.

3.2 Command-Line Interface

The synopsis for the **Publish** command-line interface looks as follows:

```
# publish <command> [command/global option]... [filename]
```

The command always starts with `publish` followed by a `<command>` which may be either `import`, `validate`, or `export`. Import and export can be used with some global option, such as `year=2008`, or `author=name_of_choice`. Import and export always require a filename to import from or export to.

Examples:

```
# publish import category=books bookfile.bib  
  
# publish export year=2002 output.pdf
```

The command `validate` can be used by itself or with a file with suffix `.pub`. If used by itself, it is the default database-file `papers.pub` that is validated.

Examples:

```
# publish validate  
  
# publish validate inputfile.pub
```

The command `export` may be used to export a publication record, for example:

```
# publish export papers.pdf
```

This will be discussed in more detail below in Chapters 4 (importing), 5 (validation), and 6 (exporting).

3.3 Global Options

The following global options are recognized by all three commands:

- `debug=yes`

Enable debugging output. With this option, Python exceptions are not caught, resulting in a full Traceback on errors.

- `autofix=yes`

Automatically choose the default option when an error is encountered. This is useful (but dangerous) when importing large amounts of data into the database.

3.4 Configuration of the System

Much of the behavior of the system can be configured by the user. The file `publish/config/defaults.py` contains default values of all the variables that can be configured. This includes, for example, the name of the default database file, the venues-file, and the file where invalid papers are stored. It is also possible to change how picky the system is when judging the closeness between papers that are considered as duplicates (`matching-distance-strong`) and how far the system will look to suggest a venue name when a venue (journal name) is not recognized (`matching-distance-weak`).

To change the default settings, the user has to make a file `publish_config.py` and make sure the `PYTHONPATH` variable is set such that any `import publish_config` imports the desired file. This means that the user may have different `publish_config.py` files for different purposes, and the one to be used by **Publish** is controlled by the `PYTHONPATH` variable. In most cases, one would like to change the default database name or other variables for a particular project, and then it is sufficient to make a local `publish_config.py` file in the directory where **Publish** is supposed to be run from and where the database is to be stored

(there is no need to set `PYTHONPATH` in such cases since Python will always try to import from the current working directory first). Note that the user's configuration file *must* have the name `publish_config.py`.

Suppose we want to change the names of the database and the venues list. For this purpose we make a `publish_config.py` file with the following content

```
from publish.config.defaults import *

database_filename = '.publish_papers.pub'
local_venues_filename = '.publish_venues.txt'
```

Note that we start the filenames with a dot to make them hidden in the project directory.

Sometimes you may want to add words that need special capitalization. Looking at the `publish/config/defaults.py` file, we realize that such words are stored in a dictionary `uppercase`. We want to add capitalization of the words “FEniCS” and “FEniCS-based”. This means that if those words, however they are capitalized in a title, will be guaranteed to be written that way. The above file will now look as follows

```
from publish.config.defaults import *

database_filename = '.publish_papers.pub'
local_venues_filename = '.publish_venues.txt'

uppercase.update({
    "fenics": "{FEniCS}",
    "fenics-based": "{FEniCS}-based",
})
```

The syntax for specifying capitalization is taken from BibTeX. Note that the key in the `uppercase` dictionary must be in lowercase. Also note that we do

`uppercase.update` to add new items to the dictionary. Doing `uppercase = ...` will just assign two entries and forget about all the entries that the default settings take care (i.e., we overwrite the `uppercase` dictionary imported in the first line). Lists and tuples must be *extended* with new values, typically by an assignment like `obj = obj + users_list`.

It is possible to skip the first import line in `publish_config.py` files. **Publish** will then merge the `publish_config.py` contents with the default values in `publish/config/defaults.py`. The syntax changes a little bit in `publish_config.py` since the variables to be configured do not exist from an import. For example, the `uppercase` variable set above is not imported so we just do an ordinary assignment:

```
database_filename = '.publish_papers.pub'
local_venues_filename = '.publish_venues.txt'

uppercase = {
    "fenics": "{FEniCS}",
    "fenics-based": "{FEniCS}-based",
}
```

Lists and tuples are not extended; just assign the desired new values.

Chapter 4

Importing

4.1 Overview

Papers may be imported into the system using the `import` command (here for a file in BibTeX format):

```
# publish import inputfile.bib
```

Papers imported to the system will either end up in the database-file (`papers.pub`) or in a file with invalid papers that didn't pass the first round of validation. The file with the invalid papers is saved with date and time so that it can easily be located if needed. During import, the papers will be merged together with the papers already present in the database with particular attention to removing duplicate entries. The database is always saved in the `pub` format.

The following steps are carried out during import (see also Figure 2.1):

1. Read `papers.pub`
2. Validate `papers.pub`, see Chapter 5
3. Read the file which is being imported

4. Validate the imported file, see Chapter 5
5. Merge `papers.pub` with the imported file
6. Make a backup-copy of the database named `papers.pub.bak`
7. Save merge papers to `papers.pub`

4.2 Supported File Formats

In Table 4.1, the mapping between filename suffix and file format is shown. These are the formats currently supported by **Publish**:

Filename Suffix	File Format
<code>.pdf</code>	PDF
<code>.bib</code>	BibTeX
<code>.bibtex</code>	BibTeX
<code>.tex</code>	L ^A T _E X
<code>.pub</code>	pub

Table 4.1: Mapping from filename suffix to format.

4.3 Handling Invalid Papers

All invalid papers will automatically be saved to a file postfixed by the current date and time (`invalid_papers-%Y%m%d-%H:%m:%S.pub`), such as for example `invalid_papers-20081128-21:11:47.pub`.

The following steps must typically be carried out when importing papers from a file containing one or more invalid papers:

1. Import file
2. Open file with invalid papers, edit and correct the inaccuracies

3. Import the file with the invalid papers
4. Repeat as needed

Alternatively, one may also edit and validate (see next chapter) the file containing the invalid papers before they are imported into the database.

It is possible to import a file using the option `autofix`:

```
# publish import autofix=yes inputfile.bib
```

When `autofix` is used, the system automatically answers all questions that arise during validation and merging. This may be useful (but somewhat dangerous) when importing a large number of papers into the database.

To see which inaccuracies that may occur during validation, see Chapter 5 (validation) below.

4.4 Handling Duplicate Papers

If two authors have entered the same paper in different (but similar) ways (for example by specifying the author list in different order) or if a conference proceeding and journal paper have identical names, a duplicate is reported during merging. The system detects this by computing the distance between paper venues (journal names) and paper titles. If this distance between two papers is less than a certain matching distance¹ then the two papers are considered as duplicates.

If a duplicate occurs, the user is faced with the following question: Attribute "*name of attribute*" differs, what should I do?

1. Keep both papers (marking them as allowed duplicates)

¹The matching distance `matching_distance_strong` can be edited in `publish/config/general.py`.

2. Ignore papers (marking them as invalid)
3. Keep first paper (*name of first paper*) and ignore second paper (*name of second paper*)
4. Keep second paper (*name of second paper*) and ignore first paper (*name of first paper*)
5. Use attribute from first paper (*value of attribute*)
6. Use attribute from second paper (*value of attribute*)
7. Print diff

If the user chooses to keep both papers, they are both marked as allowed duplicates, and will thereafter not be up for questioning again. If the user instead chooses to ignore the papers, they will both be marked as invalid, and end up in the file with invalid papers. Number three to six in the list are self explanatory. If the user chooses to print a diff, both papers will be shown at the same time in the terminal window, and the differences will be marked, so that the differences are easily spotted for the user.

4.5 Overriding Attributes

When importing a file with papers, it can be useful to specify certain attributes, for example by specifying `department=sc` (to specify publications published by the scientific computing department) and/or `year=2005` (to specify that all papers were published in 2005). This means that all papers imported at this time will get those attributes and later, if one wants to extract only those papers written in 2005, they are easily found. (See Chapter 6 (Exporting) for more information about paper extraction/filtering.) The following command illustrates the above example:

```
# publish import department=sc year=2005 inputfile.bib
```

Overriding attributes is mostly useful when the category is not easily deduced from the BibTeX entry-type. As shown above in Table 2.2, the category is not always evident for each BibTeX entry-type. **Publish** tries to make an intelligent choice, but this is not always possible.

For example, if a paper has the BibTeX entry-type `book`, then **Publish** looks for the attribute `editor`. If there is such an attribute, the `book` will end up in the category `edited`, and if not, the `book` will end up in `books`. Similarly, papers with entry-type `misc` will end up in the category `courses` if the attribute `code` is found, in `talks` if the attribute `meeting` is found, or else in `misc`.

However, **Publish** is currently not able to deduce whether a paper with entry-types `proceedings` or `conference` should be categorized into `proceedings` or `refproceedings`.

This must then be specified explicitly when importing papers:

```
# publish import category=refproceedings inputfile.bib
```

If not otherwise specified, **Publish** places all papers with entry-type `proceeding` (or `conference`) into the category `proceedings`.

Chapter 5

Validation

5.1 Overview

Papers will automatically be validated when imported into the system (including papers already present in the database), and when exported from the system. Validation can also be performed separately by the following command:

```
# publish validate
```

This validates all papers found in the database (`papers.pub`).

One may also validate papers in other files, which must then be stored in the `pub` format:

```
# publish validate inputfile.pub
```

If a paper is valid, it is saved back to the database. Otherwise, it is marked as invalid and saved to a separate file storing invalid papers.

5.2 Checks Performed

Publish checks each paper for a number of common errors:

- Status (status specified)
- Attributes (no required attributes missing)
- Venues (matching against known venues)
- Titles (formatting, capitalization)
- Page range (formatting)
- Typos (some common typos)

We discuss each of these checks below.

5.2.1 Status

All papers must be marked with a status. If the status is missing, it will automatically be set to **published**. The following values should typically be used:

- `inpreparation`
- `submitted`
- `accepted`
- `published`
- `withdrawn`
- `rejected`

5.2.2 Attributes

For each category, a number of attributes are required. For all categories, the attributes `title` and `author` are always required. For a list of which attributes are required for which category, refer to [Appendix C](#).

5.2.3 Venues

The venue (journal, conference, booktitle, etc.) for each paper is validated against a database of known venues. If an exact match is not found, the system tries to find a close match and suggests a correction.

If not found, or if the suggested choice is incorrect, the user may choose to accept the venue name as is. It will then be added to a local file of known venues (`venues.list`), which will be used for subsequent validations.

5.2.4 Titles

Paper titles are validated for correct capitalization. The system keeps a list of common words (“and”, “or”, “for” etc.) that should not be capitalized, and also a list of words that should be capitalized. The default words for capitalization are set in the `lowercase` and `uppercase` dictionaries. The default configuration is found in `publish/config/defaults.py` and can be extended in a user’s `publish.config.py` file.

5.2.5 Page Range

Page ranges must be formatted `x--y`. Illegally formatted page ranges are automatically detected and fixed.

5.2.6 Typos

A number of typos are also detected. The default typos are found in `publish/config/defaults` and can be extended in a user's `publish_config.py` file.

Chapter 6

Exporting

6.1 Overview

Publication records may be exported from the system using the `export` command (here to a file in PDF format):

```
# publish export outputfile.pdf
```

One or more filters may also be specified to extract only papers matching (or not matching) a number of attributes, for example:

```
# publish export year=2008 category=talks \  
author=langtangen outputfile.pdf
```

During export, all papers are read from the database (`papers.pub`), validated, filtered, and then formatted in the desired output format as determined by the filename suffix (see Figure 2.3).

6.2 Supported File Formats

Publish currently exports to the following file formats:

- pub
- BibTeX
- L^AT_EX
- PDF

The L^AT_EX format may be useful for generating publication records for inclusion in a CV or an annual report.

6.3 Filtering

Filters may be specified in one of two ways. Either, one may specify an attribute that must be satisfied by all papers to be exported, or one may specify an attribute that *must not* be satisfied by the papers to be exported. It is also possible to list several attributes and mix the two types of filters. The exported papers must then satisfy each one of the listed filters.

The following example demonstrates how to export all journal papers from the year 2008 which are *not* written by H. P. Langtangen:

```
# publish export year=2008 category=articles \  
author!="H. P. Langtangen" papers.pdf
```

When filtering on author names, it is possible to either list only the author's last name, the name with initials, or the full name. Thus, the following examples are all valid, but they may or may not give the same result, depending on how many authors are named “Langtangen”, whether or not papers have been entered only with initials or with full names:

```
# publish export author=langtangen papers.pdf
# publish export author="H. P. Langtangen" papers.pdf
# publish export author="Hans Petter Langtangen" papers.pdf
```

In all of these examples, the filter will match all papers where the given author name matches at least one author in the author list (for papers with more than one author).

6.4 Options

The following additional options may be given to the `export` command:

- `view_pdf=no`

Don't display generated PDF files when exporting to PDF.

- `pdf_viewer=<command>`

Specify command that should be used to display PDF files.

Appendix A

Installation

Publish follows the standard installation procedure for Python packages. Enter the source directory of **Publish** and issue the following command:

```
# sudo python setup.py install
```

This will install the **Publish** in a subdirectory called **publish** in the default location for user-installed Python packages (usually something like `/usr/lib/python2.5/site-packages`). In addition, the main script **publish** will be installed in the default directory for user-installed Python scripts (usually in `/usr/bin`). To see a list of optional parameters to the installation script, type

```
# python setup.py --help
```


Appendix B

Emacs Org-Mode

Emacs Org-Mode makes it convenient to edit the files that are saved in the internal `pub` format. Emacs Org-Mode folds and unfolds sections of a file indicated with one or more `*` at the press of the TAB key.

Thus, one may easily fold/unfold paper categories and paper attributes which simplifies editing of large publication database files.

For download and installation instructions, visit <http://orgmode.org/>.

To activate Org-Mode when `.pub` files are opened, the following lines should be added to the user's `.emacs` file:

```
(setq auto-mode-alist
      (append '(("\\.org$" . org-mode))
              '(("\\.pub$" . org-mode))
              auto-mode-alist))
```


Appendix C

Internal Format (.pub)

C.1 Overview

Papers are stored in the pub format according to the following scheme:

```
* category
** title
  attribute: value
  attribute: value
  ...
** title
  attribute: value
  attribute: value
  ...
* category
  ...
```

Each category is specified by a `*` followed by a single space and the name of the category. Within each category, each paper is specified by `**` followed by a single space and the title of the paper. Then follows for each paper all attribute-value pairs separated by `:` (spaces ignored).

Each category specifies a number of required attributes that must be specified for each paper within that category. In addition to the required attributes, any number of additional attributes may be specified.

Currently, all attribute-value pairs must be entered in a single line (multi-line values not supported).

C.2 Example

```
* articles
** Numerical Methods for Incompressible Viscous Flow
  author:   H. P. Langtangen, K.-A. Mardal, R. Winther
  journal:  Advances in Water Resources
  year:     2002
  status:   published
  number:   8
  pages:    1125--1146
  volume:   25
  key:      SC.4.Langtangen.2002.b
  entrytype: article
** Unified Framework for Finite Element Assembly
  author:   Martin Sandve Aln{\ae}s, Anders Logg, Kent-Andre Mardal, Ola Skavhaug, Hans Petter Langtangen
  journal:  International Journal of Nonlinear Modelling in Science and Engineering
  year:     2009
  status:   published
  entrytype: article
  key:      Simula.SC.96
* books
** Computational Partial Differential Equations - Numerical Methods and Diffpack Programming
  author:   H. P. Langtangen
  publisher: Springer-Verlag
  year:     2003
  status:   published
  note:     2nd edition, 855 pages
  key:      SC.1.Langtangen.2003
  entrytype: book
** {P}ython Scripting for Computational Science
  author:   Hans Petter Langtangen
  publisher: Springer-Verlag
  year:     2008
  status:   published
  isbn:     978-3-540-73915-9
  edition:  third
  duplicate: True
  key:      Simula.SC.63
  entrytype: book
  address:  Heidelberg
* theses
** Applications of High Level Software for Parallel Solution of Partial Differential Equations
  author:   {\AA}smund {\O}deg{\aa}rd
  school:   Department of Informatics, University of Oslo
  year:     2006
  thesis type: phd
  status:   published
  key:      Odegard.2006.1
  entrytype: phdthesis
```

C.3 Required Attributes

Some attributes are mandatory for a given category. For example, an article needs author, title, journal, and year (as well as status, but that can set by **Publish()**). The required attributes are defined in a variable `category_attributes` in `publish/config/defaults.py` and can be overridden in a user's `publish.config.py` file.

We refer to the `category_attributes` dictionary in `publish/config/defaults.py` for an overview of all required attributes.

Appendix D

Venues

Below are listed all venues currently known by the system.

D.1 Journals

1. none
none
ISSN: xxxx-xxxx
2. ACM Transactions on Mathematical Software
ACM Trans. Math. Software
ISSN: 0098-3500
3. ACM Computing Surveys
ACM Comput. Surv.
ISSN: 0360-0300
4. ACM SIGSOFT Software Engineering Notes
ACM SIGSOFT Software Engineering Notes
ISSN: 01635848
5. ACM Transactions on Multimedia Computing, Communications, and Applications
ACM Trans. Multimed. Comput. Comm. Appl.
ISSN: 1551-6857
6. ACM Transactions on Software Engineering and Methodology
ACM Trans. Software Eng. Meth.
ISSN: 1049-331X

7. Advances in Computational Mathematics
Adv. Comput. Math.
ISSN: 1019-7168
8. Advances in Water Resources
Adv. Water Resour.
ISSN: 0309-1708
9. Annals of Biomedical Engineering
Ann. Biomed. Eng.
ISSN: 0090-6964
10. Applied Cognitive Psychology
Appl. Cognit. Psychol.
ISSN: 0888-4080
11. Applied Mathematics and Computation
Appl. Math. Comput.
ISSN: 0096-3003
12. Applied Mathematical Finance
Appl. Math. Finance
ISSN: 1350-486X
13. Applied Mathematical Modelling
Appl. Math. Model.
ISSN: 0307-904X
14. Applied Mechanics and Engineering
Appl. Mech. Eng.
ISSN: 1425-1655
15. Archives of Computational Methods in Engineering
Arch. Comput. Methods Eng.
ISSN: 1134-3060
16. Behaviour & Information Technology
Behaviour & Information Technology
ISSN: 0144-929X
17. Biophysical Journal
Biophys. J.
ISSN: 0006-3495
18. BIT Numerical Mathematics
BIT
ISSN: 0006-3835
19. Campus-Wide Information Systems
Campus-Wide Information Systems
ISSN: 1065-0741

20. Computers in Biology and Medicine
Comput. Biol. Med.
ISSN: 0010-4825
21. Computer Communications
Comput. Comm.
ISSN: 0140-3664
22. Computational Geosciences
Comput. Geosci.
ISSN: 1420-0597
23. Communications in Computational Physics
Comput. Phys.
ISSN: 1814-2406
24. Computers & Mathematics with Applications
Comput. Math. Appl.
ISSN: 0898-1221
25. Computational Mechanics. Solids, Fluids, Engineered Material, Aging Infrastructure, Molecular Dynamics, Heat Transfer, Manufacturing Processes, Optimization, Fracture & Integrity
Comput. Mech.
ISSN: 0178-7675
26. Computer Methods in Applied Mechanics and Engineering
Comput. Methods Appl. Mech. Engrg
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2. Faculty of Mathematics and Natural Sciences, University of Oslo

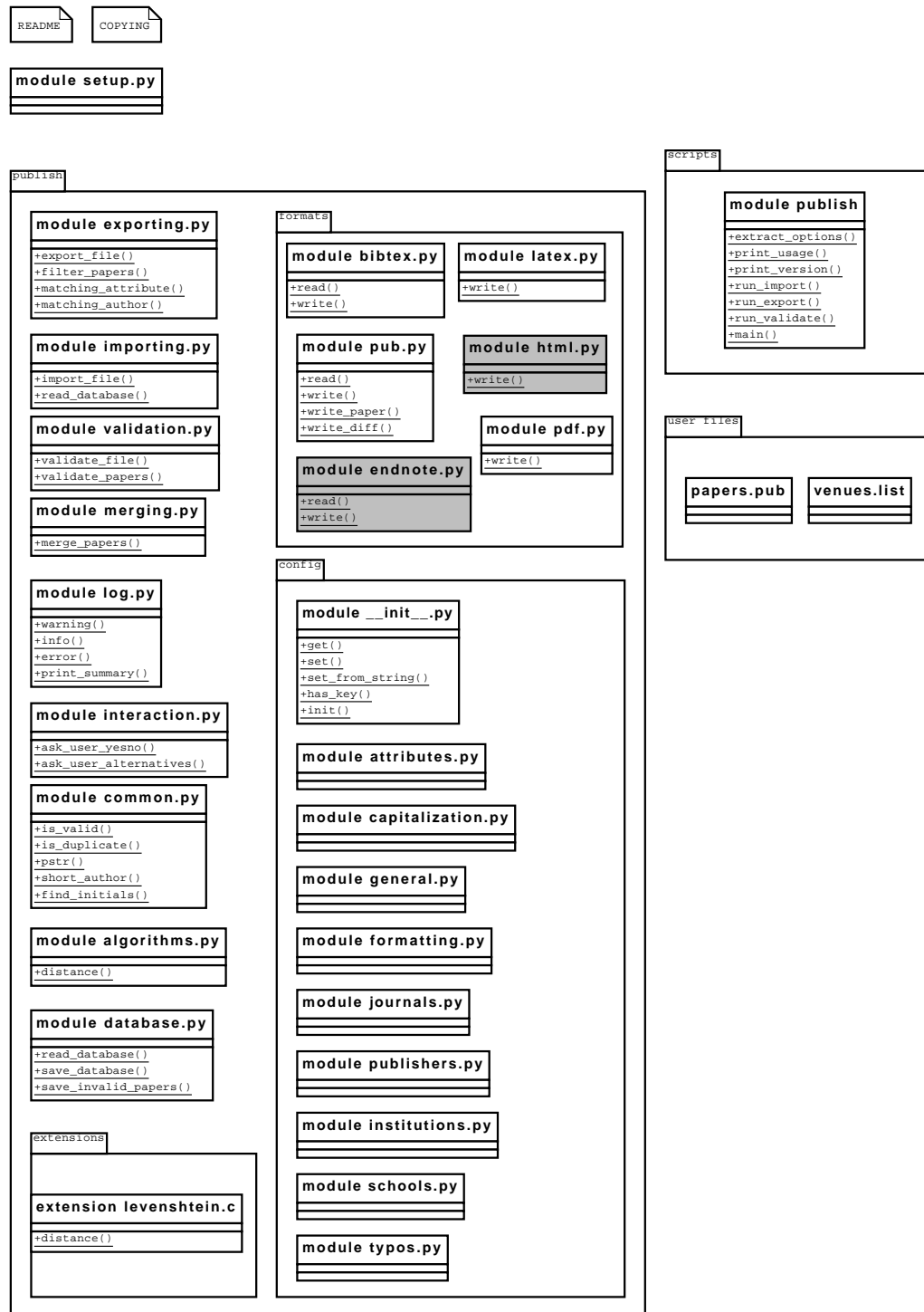
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Appendix E

Design

The figure below illustrates the design of **Publish**. Modules that are coloured grey have not yet been implemented but may be added in future versions of **Publish**.



Appendix F

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