v2.6.18

BIBLOS

# User manual

How to bring in your PDFs, sort them, search them and follow what gets published, screen by screen.

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|---|---|
| VERSION | 2.6.18 |
| DATE | 2026-11-27 |
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# Credits


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|---|---|
| DEVELOPMENT | Rafael Gallareto-Sande |
| CONTACT | rafael@gallareto.com |
| WEB | rafael.gallareto.com |



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# 1 Getting started

BIBLOS opens in its own window or, depending on what you choose in Settings > Preferences > App, in the browser. It only listens on this machine: it cannot be opened from other computers on the network. Here is what each page does, page by page.

## Installing and opening BIBLOS

BIBLOS is downloaded with everything inside: there is nothing else to install.

- **Mac (Apple Silicon: M1 or later)**: open `biblos-<version>-mac.dmg` and drag **BIBLOS** to Applications. The app is not signed by Apple, so the first time macOS will not let it open. On macOS 15 or newer, go to System Settings > Privacy & Security and click **Open Anyway**; on earlier versions, right-click BIBLOS > Open. You only need to do this once. Intel Macs are not supported for now.
- **Windows 10 or 11**: unzip `biblos-<version>-windows.zip` wherever you like and open `biblos.exe`, inside the `biblos` folder. The first time, SmartScreen warns that the app is not signed: click **More info** and then **Run anyway**.

The first time, the setup assistant opens (see the Welcome section). Your data (preferences, profile, records) is kept in the system's data folder, not next to the app: you can change versions without losing anything. If you open BIBLOS again while its window is open, it brings it to the front instead of opening another one.

## New versions

At startup, at most once a day, BIBLOS asks rafael.gallareto.com for its latest version. It only sends the version you have (not your data nor anything from your library), and it downloads and installs nothing. If there is a newer one, a card shows at the bottom right, “A new version of BIBLOS is available: …”, with two buttons:

- **Download** gets the installer for your system with the browser (or, if there is none, the downloads page);
- **Not now** closes the card, and that version is not announced again (the next one is).

To install it, do the same as the first time: your data is not touched. With no connection when it opens, it does not try again until the next day. You turn it off in Settings > Preferences > Startup (**Check for a new version at startup**). **Check now**, there and in Help's credits, asks right away and says “You have the latest version (…)”, “Could not check for a new version.” or shows the card.

## The sidebar

The sidebar, fixed on the left, is on every page. At the top, the logo and the **visible version** ( `vX.Y.Z` ). The modules are in groups separated by a line, and each item has its icon:

- Home.
- Add, Library and Collections.
- Search.
- Candidates.
- Graph, Authors and Statistics.

- At the very bottom, Profile, Import, Settings, Help and Send a report.

If a page takes a while to open, the menu shows “Working…” until it is drawn. Searching for candidates and analysing new PDFs carry on when you change page: the menu item itself (**Candidates** or **Add**) fills in green from left to right as it advances and, instead of the counter, shows “done/total” (for example “2/6”); the full text (“Searching Crossref…”) shows on hover. If something fails, the item turns red and its ↻ retries. When they finish, a notice appears on the page you are on.

Two modules show a **counter**, which updates by itself (every 2 seconds) while the app is open and is hidden when it is 0:

| COUNTER | WHAT IT COUNTS |
|---|---|
| Add (amber) | the new PDFs on disk that have no row in the spreadsheet |
| Candidates (blue) | the candidates to review |

The **footer** of the bar names the spreadsheet once, with when it was last saved (“biblio.xlsx · saved 09:07”). Only if Excel has it open, an amber pill appears below, **open in Excel**, with an amber rule on its left; when you hover over it (or give it keyboard focus), a balloon opens saying what you cannot do while it stays open (marking read or cited and editing the Record, processing in Intake, applying in Import and in the Settings tools) and how to fix it (close it in Excel, after saving your changes). With the spreadsheet closed, nothing shows, and when you close it the pill goes away by itself. The pages that write also warn on their own (see “Excel open” in Intake). If Zotero has keys, another line says “Zotero connected” (“connected” means the Zotero user ID and API key are set; the bar does not call Zotero); without keys it does not show: Zotero is optional. Below, **Developed by** and the signature, which links to the developer's website.

## The header

At the top of every page, the header stays in place as you scroll, as a single block. In the top strip, a shade darker, the search box with its scope, the book icon (**See in the manual**: opens that page's section of the manual; the text shows on hover), **Print** and **ES · EN** to change the language at any time (it is saved and the page reloads). Below, the title and, to its right, **← Back** when it applies and the page's buttons; on some pages (Add, Library), one more line with their fixed controls: what is shown, the filters and the order. Floating windows have an **×** at the top right, which closes them without applying anything.

**← Back** appears when you reach a page through an internal link (a Record from Library or Search, an author from Authors, Help from “See in the manual”) and returns you to where you were. Pressing the menu clears it.

**Print** is on every page except the two assistants, and prints the page without the menu or the header. If the page has several parts (Home, Candidates, Statistics, an author's page), it first asks **What to print**. In Library all the filtered rows come out, not only the ones in view, fitted to the width of the paper, and the table is back as it was on closing.

**Titles with formatting.** Titles keep their formatting (italics, subscripts, superscripts and small caps) and every screen draws it: Library, Record, Search, Collections, Authors, Home, Candidates and Add. The Graph's nodes and the tooltips (what shows on hover) are plain text. In Library, if the title is cut at the length chosen in Settings, it comes out without italics: that is a known limit. To give the formatting back to the old rows, Settings has the **Recover title formatting** card.

## Searching with ⌘K

**⌘K** (on Windows, **Ctrl K**) puts the cursor in the header's search box. On its left, a selector says where to search, and by default it is **Everywhere**:

- **Everywhere**: from two letters on it suggests titles, authors and tags and, if what you typed matches an author and a year ("Bruner 2015"), the **Author·year** suggestion, which opens Search with both filters (with a click, or with ↑ ↓ and Enter), and pressing Enter without choosing one opens Search with that text, including the manual sections that match.
- **On this page**: filters as you type. It only appears where there is something to filter: Library, Authors, Candidates and Help.
- **Papers** (everything that is not a book), **Books**, **Authors**, **Candidates** or **Manual**: Enter takes you there with that text.

What you choose is remembered per page while the app stays open. Search has its own large box, with no selector.

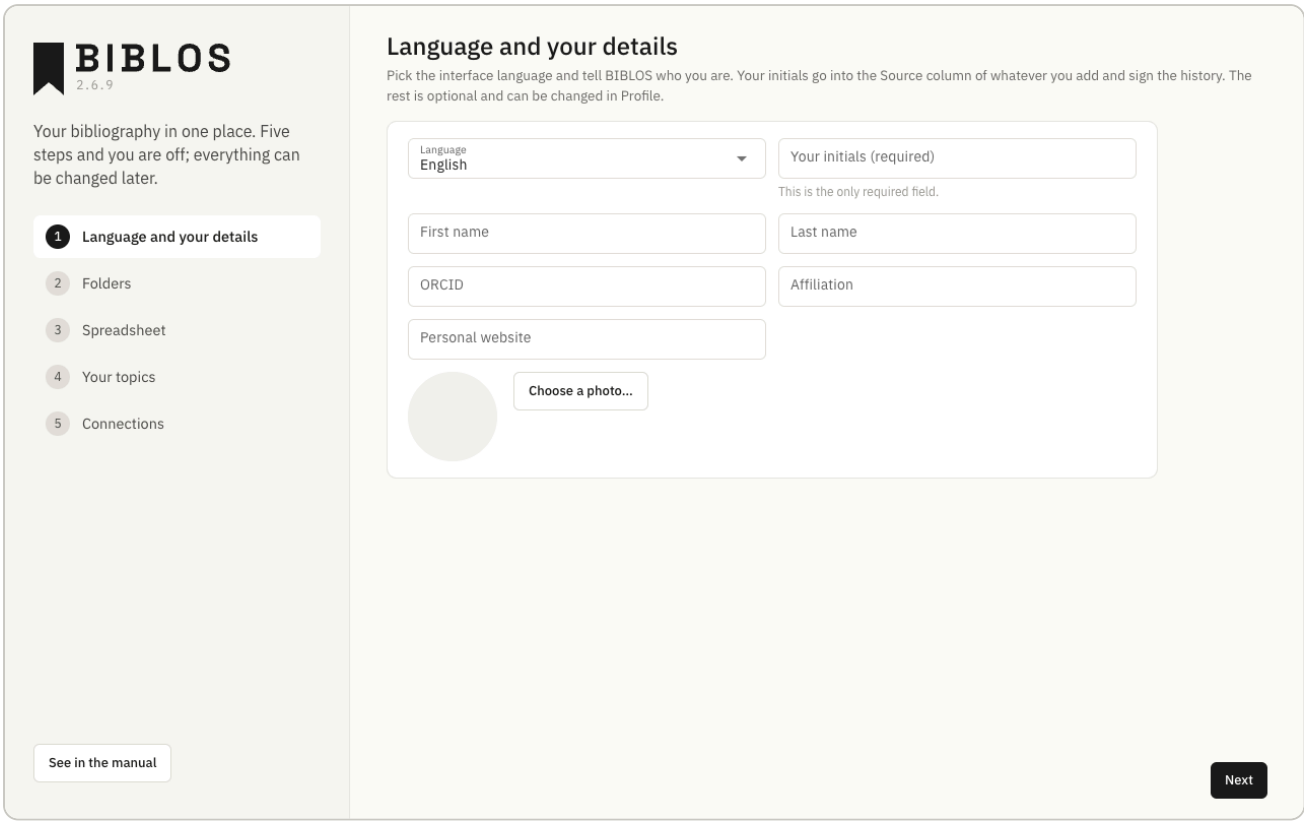
## Concepts that come up again and again

- **The spreadsheet** `biblio.xlsx` (a single sheet, with papers and books together; a book is just one more type) is the source of truth. You can open it in Excel, but **not while the app is writing**: if `~$biblio.xlsx` exists, the app refuses to write and says so. The spreadsheet's header row is black with bold white text, with the first row frozen and a filter on each column (an older spreadsheet gets this the first time it is saved, and filters you set by hand are kept). Every write first saves a copy (the last 10, in `biblio/_copias_biblio/`). **A spreadsheet from an earlier version, with two sheets (one for papers and one for books), is merged into one the first time you open it with BIBLOS 2.4**, after saving a separate copy in `_copias_biblio/` (`<name>-antes_v2.4-<date>.xlsx`, which the rotation does not delete); if Excel has it open, BIBLOS waits for you to close it. Earlier versions no longer read that spreadsheet properly: **update BIBLOS on every computer where you use it** before opening it on them. **The first time BIBLOS 2.5 opens the spreadsheet**, it translates the origin of each row and your settings (folders and preferences) to "primary" and "secondary", after saving a separate copy in `_copias_biblio/` (`<name>-antes_v2.5-<date>.xlsx`, which the rotation does not delete); if Excel has it open, BIBLOS waits for you to close it. 2.4 and earlier do not understand what was translated: **update BIBLOS on every computer before opening the spreadsheet with 2.5**.
- **PDF name**: `YEAR_surname_title.pdf`, in lowercase ASCII with underscores; the title has at most 8 words and 55 characters, and the whole name 75 (default values: change them in Settings > Preferences; they only affect the file name: the title is kept whole). On a clash, `2024a`. Split books: the folder and each chapter follow the same rule.
- **Folder = topic = Zotero collection.** PDFs live in the **primary folder**, inside one folder per topic; the **secondary folder** is another separate folder for PDFs, at any depth, and it can be turned off in Settings > Paths. Each row carries its **origin** (**Primary** or **Secondary**), which only says where its PDF lives: what each record is (paper, book, chapter...) is told by its **type**, and the secondary folder accepts any of them.
- **Notes**: one per row, in the notes folder, inside the PDF's source folder (primary or secondary) and its own folder (`Folder`), named like the PDF with a `.md` extension. They move along with their PDF.
- **Filters are kept when you come back.** In Library, Search, Authors, Statistics and Candidates, what you set in the filters is still there if you open a Record, an author or another screen and return with **← Back** or

the back button. If you enter from the sidebar menu, the screen starts clean. Filters are lost when you close BIBLOS and when you change language.

- The app's notices appear as pop-up messages: red = it was not done, orange = it was done with a problem you have to fix by hand.

# 2 Welcome




— Welcome assistant

The first time (with no `.env` and no spreadsheet), Home takes you to this page; afterwards you can reopen it from the notice on the pages that have no spreadsheet. It fills the whole window, **with no sidebar** and no scrolling. On the left, the logo, one sentence on what BIBLOS is, the five steps and the **See in the manual** button: with **Back** you return and what you had written is still there. The step you are on stands out and the ones already done carry a **✓**: click one of them to go back to it. On the right, the step, with a short **help** text that says what you are choosing and what happens if you leave it as it is. At the bottom, **Back**, **Next** and, on the last one, **Finish**.

## The cover

On the first start, before the wizard, a centred cover appears: the big logo, **BIBLOS**, the version, an **ES · EN** selector to choose the language, two lines saying what BIBLOS is and what the wizard asks for, and the buttons **Start** and **See the manual**; at the bottom, “Developed by” and its author's name (the initials). The selector changes the cover and the wizard at once, but nothing is saved until **Finish**. **Start** fades the cover out in an instant and shows the wizard. **See the manual** opens Help and, when you come back, the cover is still there. After **Start** it does not come back while the app stays open; if you quit before finishing the wizard, it appears again next time.

## The five steps

1. **Language and your details**: the language (Spanish or English; by default your system's) changes the whole assistant right away, without losing what you have already written, and is saved. The initials are

**the only thing required**: they are the default Source in Add and sign the history, and “Next” does not go on without them. First name, last name, affiliation, ORCID (the format is checked), personal website and photo are optional and can be changed later in Profile > About me.

2. **Folders**: the **primary folder** and, optionally, the **secondary** one and the notes, each with **Choose folder...**. When empty, the defaults inside the data folder (one primary, one secondary, and the notes inside the primary one). **Notes** are what you write about each record in its Record: each one is a text file ( `.md` ) in that folder, so they stay yours outside BIBLOS. Under the first two fields, a note sums it up: **separate parent folders** for the primary and the secondary work best. The secondary is another folder of PDFs, of any type, and it is optional: if you choose none, it stays off (“no secondary folder (off)”) and no folder is created; you turn it on later in Settings > Paths. If they are the same (or one is inside the other) that is fine too: BIBLOS assigns each PDF to one of the two and, if unsure, Add asks you “Which folder?”. If they coincide, a notice reminds you; it does not stop you going on.
3. **Spreadsheet**: **Create a new one** (in a chosen folder or, if empty, `biblio.xlsx` **inside the primary folder**; the field shows that path and follows any change to the folders in step 2) or **Use one I already have** (**Choose file...**; it must be an `.xlsx` with the bibliography sheet (or, from an earlier version, two sheets, one for papers and one for books, which BIBLOS merges on opening; see Getting started); if it does not have one, bring it in from Import > Add from another spreadsheet). The box “Then bring in my library” ends on Import.
4. **Your topics**: keep the current profile (if there is one), **Define with the assistant** (see Profile > The research line assistant), an empty one, the example one (cranial anthropology) or import a `.json` . The assistant opens on finishing; with “Then bring in my library”, you first go through Import, because its suggestions come from your library, and there **Define my topics** takes you to it.
5. **Connections**, all optional: you can leave them for later in Settings. One card per service:

   - **OpenAlex** (the most consulted): fills in records, authors and ORCID, and looks for candidates. Without a key you share a small daily quota; the key is free.
   - **Zotero** (highly recommended): creates the record, syncs the tags and attaches the PDF. If you do not use it, it is worth installing and linking: **Download Zotero**.
   - **Gmail** (alerts and notices): reads the alerts from your label and sends you the notices. It asks for your account and an **app password**: it is not your Gmail password, it is the 16 letters Google gives you for BIBLOS (the wizard explains how to get it). Another mail provider is set in Settings > Notification email.
   - **Semantic Scholar** (more quota): works without a key, on a shared quota.
   - **Web of Science** (institutional access only): without a key, that source stays off.

   **How to get it** opens a window with the steps and, where there are any, the links.

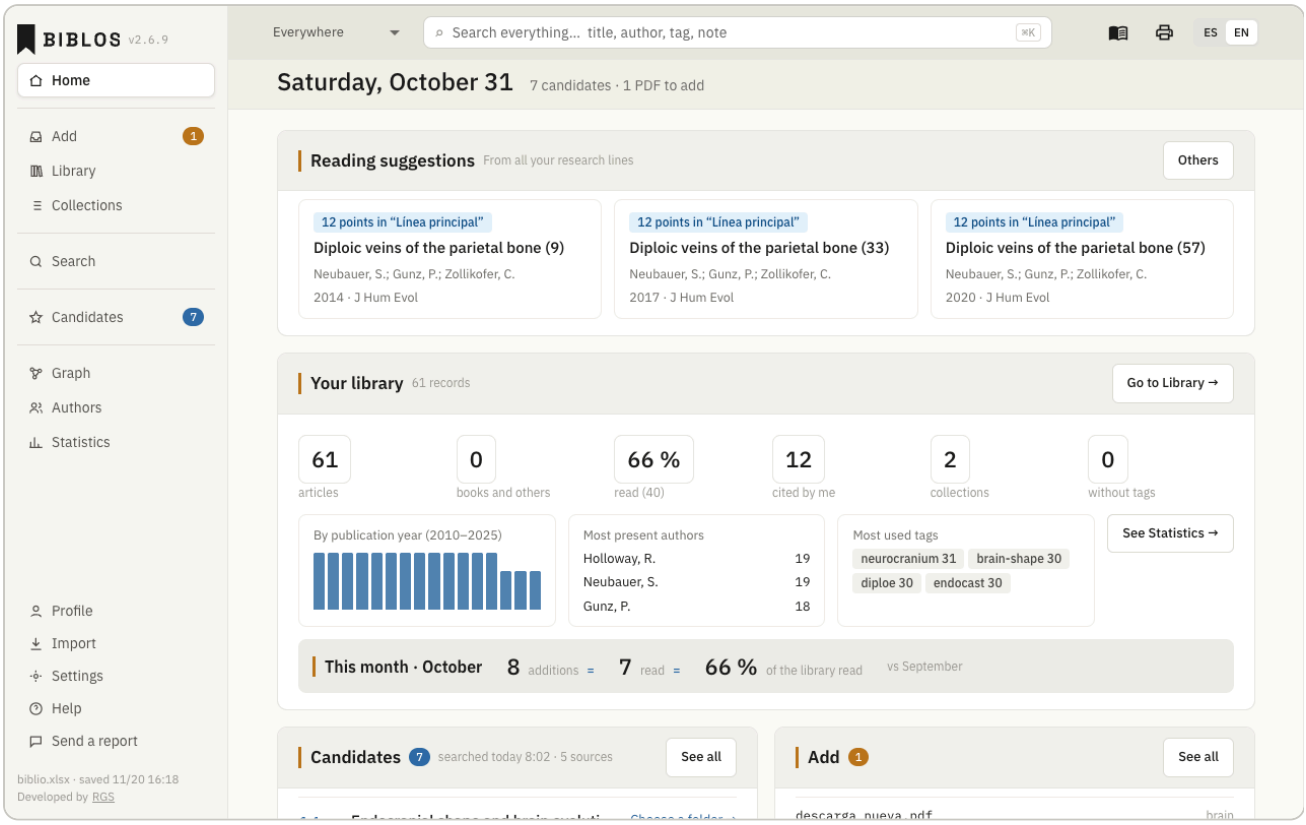
## Finish

Nothing is written until **Finish**: then everything is checked (if something is not valid it says so, one line per error, and writes nothing) and the `.env` , the primary and secondary folders (only if the folder that contains them exists: never on an unmounted disk), the spreadsheet (if there already was one in that place, that one is used), the preferences, your details and the profile are all created at once. The paths apply immediately and the whole page reloads on Home (or on Import, or on the research line assistant), with the menu already in the chosen language.

## No spreadsheet

With a `.env` but no spreadsheet (an unmounted disk, a changed path), the assistant does not open by itself. Home and Add show the notice “Spreadsheet not found: …” at the top, with **Open the setup assistant** and **Settings > Paths**, and carry on; Library, Search and the Record show only the notice.

# 3 Home




— Home page

The summary of the day. It greets you by name (“Hello, Ada”); with no name, by your initials, and with neither, with today's date (“Saturday 31 October”). Below, the date and a line: “N candidates · N PDF to add”. Below, four cards: at the top, Reading suggestions and, below it, Your library, each at full width; then Candidates and Add, two by two and of the same width, with the same heading (title, counter and **See all**).

## Candidates

The 4 with the most points of what the Candidates list shows (only the marked lines; what the unmarked lines hide is neither shown nor counted, and if everything is hidden, the card says so), with their number, title, authors · journal · year and a piece of the abstract; the title links to the article and, below, comes the folder the PDF would go to (“→ vascular”) or “no PDF”. The heading carries the number of candidates to review and, if a search has been run, “searched today 8:02 · N sources”; **See all** opens Candidates.

**Search now · ~N min**, at the foot of the card (the figure is the approximate time with the ticked sources; on hover, the breakdown by source), searches without leaving Home. While it searches, the progress bar takes the button's place, with a short line (“Semantic Scholar 23 of 59 · ~9 min left”); the button hides and comes back when it finishes. The **Candidates** menu item fills in as it advances (“23/59”), and when it finishes the card updates by itself.

- **Accept** downloads the PDF to the folder the candidate suggests, just as in Candidates (or, if the candidate has no open PDF, marks it, opens the article in the browser and leaves it in Add, without PDF). If the PDF cannot be downloaded, the row shows **Upload the PDF** (download it yourself from the title and upload it there) and **Accept without PDF** (it leaves it in Add, where you can upload it later).

- If it has an open PDF but no suggested folder, instead of “Accept” you get **Choose a folder →**, which takes you to Candidates to choose it there.
- **Discard** hides it for good.

## Add

The first 4 new PDFs (the proposed name if the record is already in the cache; Home does not request records from the network; otherwise, the file name) with their folder; with none, “No new PDFs in your folders.”. The heading carries how many there are and **See all** opens Add. At the foot, **Process approved (N)** processes the ones you left approved in Add, in the background (see “Process” in Add).

## Reading suggestions

Three records of your library that you have not read yet, in three cards in a row and at full width (in a narrow window, one below the other). Each card is clickable as a whole: a click anywhere opens its Record, and the background changes softly on hover. At the top it carries the reason, if they come from your lines and score, in a pill (“12 points in “Morphology””); below, the title (a link, also for the keyboard), the authors (up to three and, if there are more, “et al.”; if they do not fit in the card, they are cut at a whole name with “[...]” and hovering shows them all), the year and the journal. They carry no abstract. The heading says how they are chosen: **From all your research lines** (from most to fewest points; all the lines of the profile count, ticked or not, because the tick decides what is searched in Candidates, not what you read) or **At random: today's** (the same all day; reading one does not change the others). You choose it in Settings > Preferences > Home. **Others** brings the next three and, at the end, goes back to the first ones. If there is nothing to suggest, the card says why: your library has no records, you have read everything, or you have no lines with topics that score (with a link to your lines in Profile).

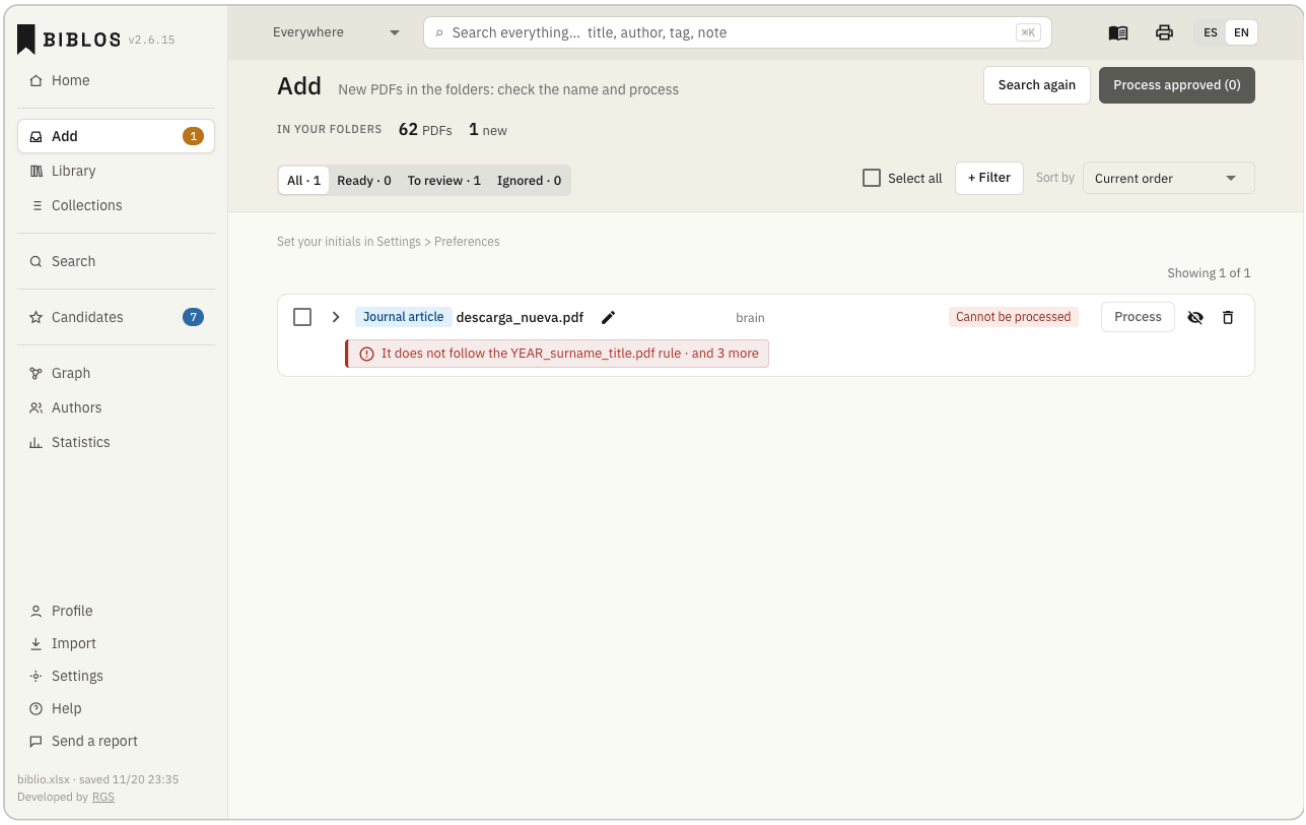
## Your library

A card at full width, below the suggestions. The heading says how many records your library has and carries **Go to Library →**. Below, a row of figures: articles, books and others, % read (with how many that is), cited by me, collections and records without tags. Then, three mini charts: records by publication year (bars; on hover, the year and its number), the most present authors and the most used tags; with little or nothing to count, the chart says “No data yet.”. To the right of the charts, **See Statistics →** opens Statistics.

## This month

The band at the foot of Your library, “This month · November”: the additions and readings of articles for the calendar month, each with its difference from the previous month (+3, −2 or =; the band ends with “vs October”), and the % of articles read.

# 4 Add




— Add page

For PDFs you have just downloaded into a topic folder. Next to the title, **Search again** (repeats the scan) and **Process approved (N)**.

## Excel open

If `biblio.xlsx` is open in Excel, BIBLOS reads it but cannot save to it. When you enter Intake, a window appears, “biblio.xlsx is open in Excel”, saying what you cannot do (processing in Intake, marking read or cited and editing the Record, applying in Import and in the Settings tools) and how to fix it: close it in Excel, after saving your changes. **Got it** closes the window and, while Excel still has the file, a red notice stays at the top (“biblio.xlsx is still open in Excel: close it to be able to save.”) and, next to each button that writes, an amber line (“Not saving while biblio.xlsx stays open in Excel”), with the button switched off. When you close the file, the notice and the lines go away and the buttons return to how they were. The same happens in Record, Library, Import, Settings and Profile.

## What it does when opened

The app **looks for the PDFs (and split books) that are not in the `Filename` column** and **analyses** each one: it asks OpenAlex or Crossref (papers) or Open Library or Google Books (books) for its data and, with Zotero, compares it with your records. The records are cached: what has already been analysed does not take time again, even if you close the app halfway. Folders starting with `_` and aliases are ignored. Each file shows up in **a single card**, even if the primary and the secondary folder are the same or one is inside the other.

**If you turn “Use the secondary folder” off** (Settings > Paths), Add only looks at the primary folder: it does not look in the secondary one, does not ask for it or warn about it, and forgets what was approved, saved or ignored for it. The secondary rows already in the spreadsheet are not touched.

**Zotero comes first.** With Zotero, before analysing anything the app waits (up to a minute) for the Zotero cache to be up to date; if it takes longer, it carries on and says so. Each PDF is matched with a record in this order: the path of its attachment (an old path too), the DOI, the title and year, and the surname, year and words of the file name. With a record, the data come from it and the network is not asked. If Zotero changes while the list is open, a notice says “Zotero has changed: update the list to see what is already there”; on updating, what you typed by hand is not overwritten.

**The analysis runs only the first time** you open Add. After that, the list stays as it was, even if you leave and come back, until you press **Search again**.

Under the title, in the **fixed header** (it stays in place as you scroll), is the **summary**, in a one-line strip. First, **your folders**: how many PDFs there are, how many are new and, with Zotero, how many have no record. After a rule, **Zotero** (only with Zotero): the **Zotero collections** selector (see “The cards”) and **+ info**, which opens below it the rest of the counts: how many records there are, how many match their PDF and how many have no PDF in your folders, with the reason in a discreet line (see “From Zotero and Missing PDF”); **– info** closes it, and Add remembers how you left it. The Zotero figures count only the records in the chosen collections (none chosen, all of them); those for your folders do not change. If the strip does not fit, Zotero moves to a line of its own. While the Zotero cache has not arrived yet, it says “Zotero: loading…”; the summary and the collections are there before the analysis starts, and they update by themselves when the cache arrives. Collections in Zotero's trash (and their subcollections) are not shown.

The list is not available until it finishes. Meanwhile, you see one thing at a time:

1. **The notice**, only with 50 PDFs or more to analyse: “There are 423 new PDFs to analyse”, with **All at once** or **In blocks of N** (N is the Add rows setting in Settings > Preferences; each block waits for you to ask for the next), **Not now** and **Start**. With fewer, it starts by itself.
2. **The progress**: the bar, “165 of 423”, the minutes left (as soon as there is enough to work them out), the current file and how many are Ready, Already in Zotero, To review and Not analysed. **Stop** halts it between one PDF and the next. **Work with the N ready** moves on to the list without stopping it.
3. **The list**, when it finishes. It is a snapshot: its figures do not move while you work. If the analysis carries on in the background, it says “There are N more PDFs analysed” with **Update the list**, and whatever was not analysed, **Analyse the remaining N**.

**The analysis carries on even if you leave Add**: the **Add** menu item fills in green from left to right and, instead of the counter, shows “165/423”; the text, “Analysing 165 of 423”, shows on hover. When it finishes, a notice on the page you are on. A PDF that fails stays To review; if it stops because of an error, the item turns red with ↻, and you can retry.

**New PDFs while the list is open.** If you save a PDF in your folders (or delete one in the list) while it is open, a few seconds later a notice shows above it: “There are 2 new PDFs in your folders” (or “1 PDF in the list is no longer there”) with **Review them** (**Review it**, if it is one) or **Remove them from the list**. Clicking it analyses only the new ones and their cards show at the top; the others are not touched, neither what you edited nor what you approved. What is no longer there leaves the list and the approved ones. If the list was empty, the new PDF is looked for by itself.

## The cards

Under the summary strip, tucked against the list, the **header** carries, on one line if they fit (on two if not), the state filter, always in view (**All**, **Ready**, **To review**, **In Zotero**, **Ignored** (see below), with their counts), the **Select all** box (it approves or unapproves what is in view; it shows a partial state if only some are approved) and, with cards approved, **Search for data again (N)** and **Process selected (N)** (only the marked ones in view under the current filter; see “Process”), the **+ Filter** button (like Library's; it holds the **record type** (the ones on the chosen tab, each with its count: journal article, book, report…) and the folder, which appear as removable chips, on a row of their own below that line, e.g. “Type: Book”) and, on the right, **Sort by** (see below). Above the list, on the right, “Showing 25 of 398”. **The “+ Filter” follows the tab**: the type and folder options come only from what the chosen tab shows (All, Ready, To review, In Zotero, From Candidates…; under **Ignored**, what is ignored), the counts per type count only what is on that tab, and everything is recalculated when you change tab. A filter you had already set that is not on the new tab is kept as a pill. If the tab is empty, **+ Filter** is greyed out and, on hover, says “Nothing to filter on this tab”. **The filters act on each other**: with Book chosen, Ready, To review and In Zotero count only books. **Ready** includes what is already in Zotero. The **From Zotero** filter shows the Zotero records that do not have a row yet (see “From Zotero and Missing PDF”). A paper with no tags only shows under All, because it can be processed after a warning. They are kept when you change language.

Cards come 25 at a time (change it in Settings > Preferences), the approved ones first. **Show 25 more**, at the foot, brings the next ones.

With Zotero, the collections button in the summary's **In Zotero** group (“All (7 top-level)” by default) opens the collection **tree**: only the top-level ones show, folded, and the arrow unfolds their subcollections. Ticking a collection ticks its subcollections, and you can untick a single one inside it; **Tick all** goes back to all of them. It decides which collections the “From Zotero” records come from and which records the summary's Zotero figures count; the button says how many you have chosen. It only affects those cards: it does not change how PDFs are matched with their records, and the summary says how many records are left out. Changing it repaints the list without analysing again, and what you had already approved is not hidden. **Sort by**, on the right of the header, changes the order of the cards: **Current order** (the usual one, approved first), **Year (newest first)**, **First author**, **Title**, **Folder**, **Status** or **Record type**; whatever lacks the data goes last.

Each PDF is a **collapsed row**: the box to approve it, the arrow, the **title** with its **pencil**, a chip with its **record type** (“Journal article”, “Book”…), year · author · folder, the **state** (**Ready**, **No tags**, **Already in Zotero**, **Already in the library**, **From Zotero** or **Cannot be processed**) and **Process**. A click anywhere on the row expands it, except on the box, the pencil and Process. The pencil brings the title in view (with no title, the file name, which only counts if you confirm it with Enter or change it). If a card cannot be processed (approved or not), its first reason shows in red, in a box under the row (“and 2 more” if there are more; all of them inside the card).

**With the card open**, the red “Will not go in” strip is hidden and its reason moves into the card body. What is already in the library (same Zotero key, same DOI or a file with the same name in the same folder) no longer shows up as a new card. If a PDF has just been renamed or moved, the row is brought up to date and a notice says so (“N renamed PDFs: updated”). If only the title and year match (similar file names do not count), the card carries an amber box “Looks like the same work as…” with **Same work** (it stays where it is and does not come back) and **Different** (it stays as a new card).

**Copies of what you already have.** Above the list, a line says “N copies of papers you already have” with **See**. They are PDFs that are the same work as a row in your library: they stay where they are and do not show up as new. Each copy has **Back to the list** (it becomes a card again) and, for all of them, **Move them to _ignored** sets them aside in the `_ignored` folder of their root, without deleting them.

**Expanded**, it has the **record type** selector (see above; it includes Book), year, first author, folder, Source, file name, tags and three lines: **Origin** (“Origin: primary folder” or “secondary folder”, with the path of the PDF and the folder warnings), **Data** (where the record came from) and **Zotero** (its state). Long texts are cut with “…” and the full text shows on hover.

The **proposed name** (“File name”) is editable, with live errors, and only counts words or characters if you go over the limits in Preferences; with no year, it is the original one cleaned up. The **folder** offers those on disk; if it is new and Zotero has keys, it is checked there: if the collection already exists there is no warning; if not, “The collection “…” does not exist in Zotero: it will be created on processing”; if Zotero does not respond, it says it could not check. The **Source** is, by default, your initials (without them it stays empty and a notice says “Set your initials in Settings > Preferences”) and takes another typed value, even without pressing Enter. A loose PDF in the root goes to the folder you choose (or the suggested one, see below), and the app moves it.

**“The year is missing”** and the like say where the data was looked for (PDF, OpenAlex, Crossref, Open Library, Google Books). The year and surname in the file name are proposed, with a note on where they come from: check them. With a surname that has a particle (“Bermúdez de Castro”, “van der Waals”), the proposed surname keeps the particle, but the file name uses the first word that is not a particle (“bermudez”, “waals”). If an authors field has several people in one string (“Thomas A. Woolsey, Joseph Hanaway”), the proposed surname is the first one's (Woolsey). In the file name, apostrophes are dropped and joined (“D’Silva” → “dsilva”, “O’Brien” → “obrien”) and the prefixes **al**, **el**, **ben**, **abu**, **saint**, **sainte**, **st**, **ste**, **mac** and **mc** are joined to the next word, with a hyphen, space or dot (“Al-Khalili” → “alkhalili”, “St. John” → “stjohn”, “Mac Donald” → “macdonald”).

Each PDF also carries its **Record type** (journal article, book, conference paper, thesis…), which BIBLOS takes from Zotero or OpenAlex. If OpenAlex gives a more specific one than Zotero, it shows with the **suggested type** chip; remove it with its × to keep Zotero's. If Zotero and OpenAlex give different types, either way, the card says so below (“Zotero: … · OpenAlex: …”); processing does not change the record's type in Zotero. The card's selector changes it by hand, and it is on every card, books included: the type says **what it is**, not where it lives (see “Type and source folder”). Changing it does not move the PDF. If it goes from book to another type, or the other way round, the data is looked up again with the right service (Open Library and Google Books for a book; OpenAlex and Crossref for the rest), and **Source** only shows for what is not a book.

## Suggested tags and folder

So that as few cards as possible are left **No tags** or **Cannot be processed**, BIBLOS proposes what is missing from what it knows about each record:

- **Tags**: to a card with no Zotero tags and none typed by you, it proposes those of your research line that match its title and abstract (the Profile's rules) and the topics and keywords OpenAlex gives. They show as chips marked **suggested**; remove the wrong one with its ×. They count like any tag: the card becomes Ready and, on processing, they reach the row and Zotero. They never replace Zotero's, and what you remove does not come back. For From Zotero records with a DOI, BIBLOS asks OpenAlex for their data during the analysis.

- **Folder**: to a card with no folder (a loose PDF in the root, a From Zotero record whose collection is no folder, one whose source folder you changed) it proposes one that already exists, in this order: the Zotero collection, the folder holding the papers with tags like its own, the folder of one of its tags, that of the OpenAlex topic and, if nothing works, the unsorted one. It shows with the **suggested folder** chip, and hovering says why. Change it in the Folder field as usual.

**Folder tag**: each card also gets the name of its folder as a tag, with the **folder** chip (no "×"; it changes if you change the folder). It does not count towards leaving **No tags**: a card only counts as tagged if it has one from your vocabulary.

That way, only the cards that really lack something only you can say stay unprocessed: the title, which folder it belongs to (with overlapping folders) or whether it is a duplicate.

**If you approve a card that is missing something**, a line below says so: "scan_0231.pdf is ticked, but it will not go into "Process approved" until the year and the author are filled in". **Process approved (N)** counts only what will go in.

## Type and source folder

The **record type** says what each PDF is (see above) and the **source folder**, where it lives: the primary or the secondary folder (the row shows it as **Primary** or **Secondary**). They are different things: the secondary folder accepts any type —a book, a report, an article— and so does the primary, and the row keeps both.

With **separate** primary and secondary folders, the source is the folder where the PDF is. If they are **the same, or one inside the other**, BIBLOS assigns each PDF to one of the two with these signals, from strongest to weakest:

1. the item type of the record in Zotero;
2. the type OpenAlex or Crossref gives for the DOI;
3. an ISBN with no DOI: book;
4. a DOI with no ISBN: paper;
5. the pages, as a weak signal: many point to a book, few to a paper.

Anything doubtful, or when the signals clash (a single chapter has a DOI and an ISBN), goes to **To review** with the question **Which folder?**, with its type chip in amber, and is not processed until you choose. If the two folders coincide, a **blue notice** at the top says so, with **Change the folders** (it takes you to Settings > Paths); it shows as long as there are cards.

With the card open, **Which folder?** (**Primary folder** | **Secondary folder**) only shows with overlapping folders and chooses the source; it does not change the type. If both folders are the same, the PDF does not move. If one is inside the other and you choose the other folder, the PDF goes to a topic folder **from that root** (the suggested one, see "Suggested tags and folder"), which you can change, and on processing the PDF **moves to it** with its note. The type is changed separately, in its selector.

## What is already in Zotero

With Zotero, each PDF is compared with your records: by the attachment pointing to it and by DOI or title and year. The card says **Already in Zotero, with the right path** or **with another path: it will be fixed when processing**, and brings its tags, with a **Z**: they are not removed here. **Add tags (added to Zotero too)** lets you

add others, which reach the row and the record without taking anything away. On processing no other record is created: the key and the tags go to the row, and the attachment that pointed to the file changes path instead of leaving another one. With no record in Zotero, a **Tags** field lets you add them before adding the paper, with the vocabulary as suggestions; they reach the row and Zotero. Without Zotero, or if it fails, the card has no such state.

## Already in the library

If a PDF belongs to something you already have in the spreadsheet (the same `Zotero key`, the same DOI or the same title and year), the card says **Already in the library**, with its Excel row, and it is not processed: no second row appears. To see it, **See the row** takes you to its Record. If the PDF is spare, **Ignore this PDF** sets it aside (see “Ignore”).

## From Zotero and Missing PDF

A Zotero record that has no row in BIBLOS and no PDF on disk shows up as a **From Zotero** card, with its chip and its filter. It goes to the primary or the secondary folder according to its type, and to the folder of its collection; it has no file name to propose. If a PDF in the list already brings that record, the Zotero card does not show.

Each record without a PDF **says why**: “The Zotero record has no PDF attachment” (these have their own **No PDF** filter), “The PDF is outside your folders”, “The PDF is uploaded to Zotero” or “The Zotero link points to a file that is not there”. In the count above, each reason shows as its own chip. On the card, the reason goes in small print under the title, which keeps its full width. If the PDF is outside your folders or uploaded to Zotero, the **PDF is copied** chip goes there too: on processing, it is **copied** into its folder (the original is not moved) and the Zotero link goes to the copy (what is uploaded to Zotero is left alone). An old file name on disk also matches its record. For uploaded PDFs, BIBLOS looks for the Zotero storage (see Zotero's data folder in Settings > Paths). It follows the Zotero cache without scanning again: the tags are always brought up to date, and so is the record unless you have already edited it.

**Processing it** adds a row with no file: it shows the **Missing PDF** chip (here, in the Library and in the Record). When the PDF reaches its folder, Add matches it with that row and **completes it**: it sets the name, the folder and the link, instead of adding another row.

## From Candidates

A candidate you accept **without PDF** (it had no open PDF, or it could not be downloaded and you chose **Accept without PDF**) is not lost: it shows here as a **From Candidates** card, with its chip and its filter (only if there is any). Its data comes from the candidate (title, authors, year, DOI, journal) and, with a DOI, from OpenAlex; if you already have its record in Zotero, it is matched with it. It carries suggested tags and folder; the folder is the one Candidates suggested, if there was one. If a PDF in the list is the same work, the Candidates card does not show. Processing it adds a **Missing PDF** row, like From Zotero. **Delete**, on these cards, opens a window that asks what to do: **Discard it** (it stays discarded in Candidates) or **Send it back to Candidates** (it goes back to review), plus **Cancel**. Either way it leaves Add and the approved ones, and it does not go to Blocked.

**Upload the PDF**, on From Candidates cards and From Zotero cards without PDF, lets you give it the file: you download it, pick it and the card says “PDF uploaded here: it is copied into its folder when processed”. On processing, it is copied with the BIBLOS name (and, with Zotero, linked) instead of staying Missing PDF. If the

file is not a PDF, it says so.

## Records with no title

If the PDF does not say its title (or its metadata carries a placeholder one, such as “Untitled”, “Document1” or “Microsoft Word - …”), BIBLOS does not look it up by that text: it looks it up from the file name: it takes the year, the surname and the words of the title from it and tries them in OpenAlex and Crossref. If there is no answer because there is no network, the card says so and that record is not kept in the cache, so it is tried again. An empty record from an earlier version is analysed once more, just once.

**Search for data again**, in the body of each card, repeats the search for that record; with marked cards, **Search for data again (N)**, above the list, does it for all of them and counts how many ended up with a record. If the new search finds nothing, the record you already had is not changed.

## Ignore

**Ignore**, on any card, sets it aside without scanning again: that PDF stops showing in the list. The **Ignored** filter shows them, with its counter, and **Restore** puts one back in the list. For duplicates, **Ignore this PDF** does the same.

In **Ignored**, every row (including those with no file, such as From Zotero or From Candidates) also carries **Block**: the PDF **does not move** from its folder, but it leaves Add altogether (it no longer shows under Ignored either) and goes to the **Blocked** list in Settings (see “Blocked” in Settings). A notice says so, with a link to **Settings › Blocked**.

**Search again** repeats the scan while you work, with a waiting bar; when it finishes it says “N new PDFs” or “No new PDFs”. If the list changed while it was searching, it stays as it was.

## Delete and block

**Delete**, on a card, opens a window with three buttons: **Delete it**, **Block it** and **Cancel** (From Candidates cards have their own window, described in “From Candidates”).

- **Delete it** sends the PDF to the **system Trash**, where you can recover it; for a split book, it sends the whole folder, with everything in it. If the card matches a Zotero record (Already in Zotero or From Zotero), that record goes to **Zotero's trash**, where you can also recover it. On a From Zotero card with no file, only the record is removed. When it finishes, a notice says what was removed and where it went.
- **The Zotero record is not touched** if any row of your library uses that record, if the spreadsheet cannot be read, or if the file's path is not valid (secondary folder switched off, or outside your folders); the window says so. If there is nothing to remove, **Delete it** is greyed out.
- If the Trash fails, nothing changes. If Zotero fails afterwards, a notice says the PDF is already in the Trash but its record is still in Zotero: remove it from Zotero.
- **Block it** leaves it where it is and takes it out of Add; unblock it in **Settings › Blocked**.

## View the PDF

With the card expanded, **View here** opens the PDF inside it, so you can check the data without leaving Add; **Hide the PDF** closes it. It stays open while you edit the card.

## Process

**Process** (or **Process approved**, with the cards approved) does, in this order:

1. rename the PDF (and move its note);
2. add the row to the spreadsheet;
3. create the Zotero record in the folder's collection (creating it if it did not exist; with its tags and the `Zotero key` in the row);
4. link the PDF in Zotero.

If any of the papers has no tags, a window says so first, with how many: **Go back** to add them or **Go on without tags** (they can be added later in the Library).

**Processing goes on even if you leave Add**: the batch runs in the app, and the **Add** menu item fills in and shows “3/12” (on hover, “Processing 3 of 12”; if it coincides with an analysis, processing wins). When you come back, the list is painted with what it has so far: the card in progress stands out, with a border and “Processing…”, and the others are dimmed, waiting. When it finishes, a notice on whatever page you are on says “Processed 12 of 12” (if some failed, “…: the rest are half done in Add”). **Each card leaves the list as soon as it finishes well**, without waiting for the rest of the batch; one that fails stays until the end. The others keep what you edited and are not looked up again. While a batch runs you cannot start another, nor a new analysis (“Already processing: wait until it finishes”). If it stops on an error, the bar says “Processing failed” with **Retry**, which goes on with what was left (in the menu, the item turns red and its ↻ does the same). **Process approved (N)** processes everything approved; **Process selected (N)**, only the marked ones in view under the current filter. Home processes the same way.

**Books do the same steps.** They carry **tags** (the book card has its selector) and their Zotero record is of the book type, in the books collection, with a subcollection per folder (or inside your `libros` collection, if you already have one; see Settings > Zotero). A split book renames the folder and its chapters, the record comes from the first chapter and it has no PDF link. **Without Zotero** (no Zotero user ID or API key) papers skip the record and the PDF link: rename and row. The row then carries the tags from the profile's vocabulary and the `Authors` column, with the OpenAlex or Crossref names separated by “; ” (books have it too). An unfinished process that was waiting for Zotero finishes on retry.

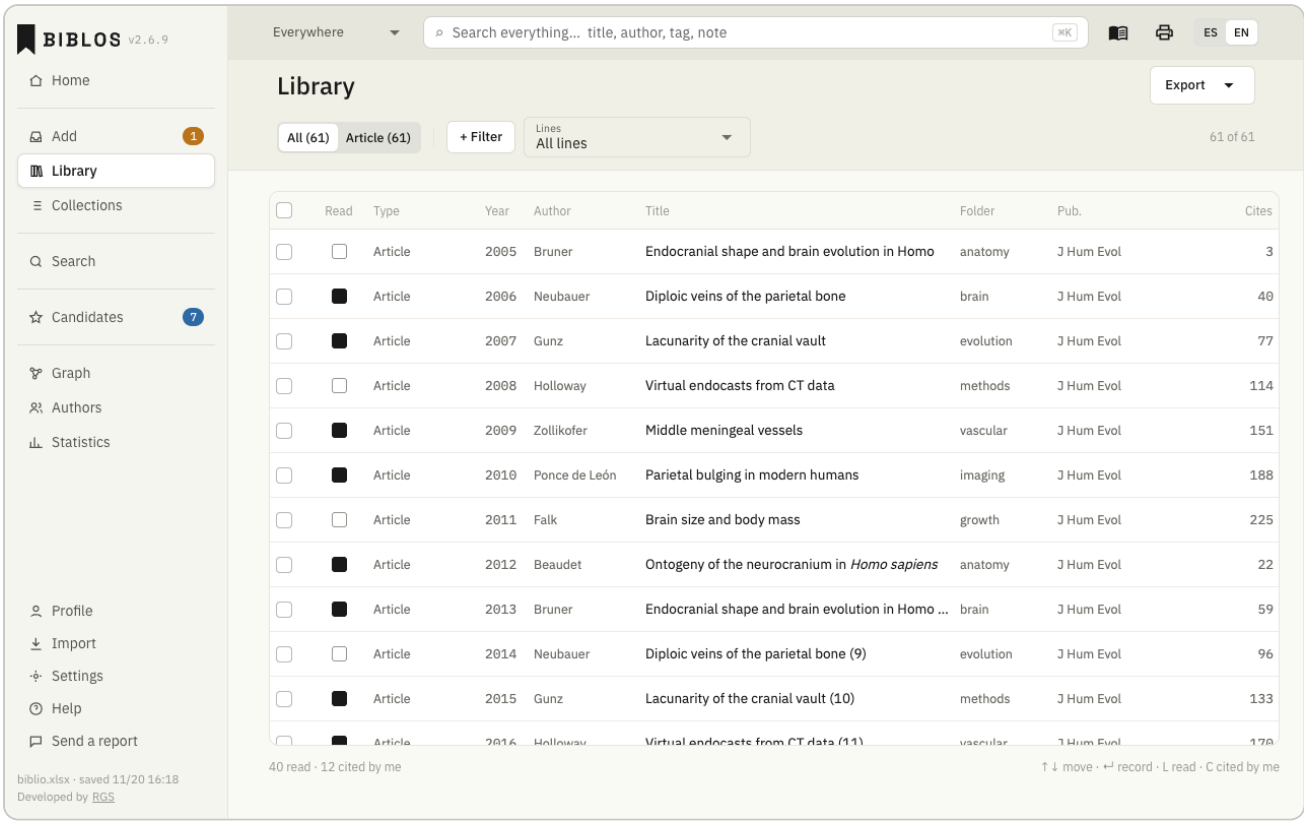
## Approvals are kept

What you approve (with each card's name, folder and Source) **survives closing the app**: when you reopen Add, the cards are still approved. They only hold while the PDF does not change (same size and date) and is still new; otherwise they are forgotten. What you approve here is also seen by Home in **Process approved**.

## If something fails

Every step is recorded. If one fails, the process appears at the top, under **Unfinished** (with an amber border), with “step N of M”, what was done, the error and the buttons **Retry** (resumes from the step that failed), **Create the collection “…” and retry** (if it was missing and could not be created on processing) and **Discard** (only if it did no step: it gives the card back as it was, without scanning or analysing again).

# 5 Library




— Library page

`biblio.xlsx` in a single table, with papers and books together. **Cells are no longer edited, except to tick Read and Cited**; to change any other value, use the panel on the right or the full Record.

## Types and filters

- **Types**: at the top, **All (N)** and one button for each kind of record there is (Article, Book, Chapter, Conference...), each with its count. The counts are those of all the rows, not of the filters. A click on a type leaves just those records; **All** shows them all again. If the types do not fit on the line, the other controls (**+ Filter**, the count and the selection) drop to a second line.
- **Filters**: **+ Filter** opens a menu with Year from, Year to, Folder (includes its subfolders), Author, Source, Tag, Read and Cited by me. **Author** searches by name or surname, ignoring accents and case. **Folder, Source and Tag accept several values**: one match is enough (OR); across different filters, all must hold (AND). Each value set appears as a **chip** ("Folder: vascular") with an "×" to remove just that value. The chips go on a row of their own, below the **+ Filter** one; with no filters, that row leaves no gap. Source only exists in papers (it is not shown in books); Tag and Author work for all of them. The folders offered are those of the types you are viewing: when you change type, the ones that no longer apply leave the filter. The header box, with **On this page** chosen ("Filter the table..."), also filters by text across all columns.
- **Lines**: next to **+ Filter**, a selector with the research lines of your profile, each with its own checkbox (the menu stays open while you tick several, and the × empties it). Closed, it always has the same width and says "All lines", the name of the chosen one or "N lines selected"; on hover, a tooltip lists which ones. It only shows if the profile has more than one line; with none ticked (the default) it means all. A record gets

in if any of its tags belongs to any of the chosen lines (those in the line's tag table and rules, plus their parents); with no tags, it does not get in while the filter is on. Each page remembers its selection while the app is open, not after closing it. **Clear filters** does not empty Lines: empty it with its ×.

- **Missing PDF**: a row that comes from Zotero and has no file yet carries this chip. When the PDF arrives, Add completes it.
- **N of M**, to the right of the filters: the rows shown and the rows the chosen type has. Below, "N read · N cited" and the shortcuts.

## The table

Columns: Read, Year, Author, Title, **Type** (the short name: Article, Book, Chapter...; the long one on hover), Folder and Pub. (papers only). Read is narrow, with the header and the checkbox centred. **Cited by me** is no longer a column: it is still in the filter, in the panel, in the Record and in the **C** shortcut. The **title** stays on one line and uses all the width left: if it does not fit, it is cut with "..." and the full title shows on hover. In Settings > Preferences > Library you can cut it earlier, at a number of characters (0, the default, means no cut). Author, Title, Folder and Pub. show the full text on hover, only if it is cut. Titles with formatting (a species in italics, a subscript, small caps) are shown with it; if the title is cut at the number of characters chosen in Settings, it comes out without italics or other formatting (a known limit). Click a header to sort. One click on the **Read** checkbox ticks or unticks it (ticking saves today's date; if there was one already, it keeps it); **Cited by me** is ticked the same way in the panel. Ticking from the table or from the panel does not move the list: the row you are editing stays in view.

Besides, on papers, the **Cites** column (at the end; empty on books): how many times it has been cited, according to OpenAlex; it sorts from most to least cited. Do not confuse it with **Cited by me**: your checkbox for having cited it in a work of your own.

## The panel

One click on any other cell of the row opens the record panel on the right. From top to bottom it has:

- the path with **Folder:** in front (the origin —Primary or Secondary— and the folder, e.g. `Primary / vascular`), a **type** selector (changing it changes the fields of the record), **Full record** and "×" to close it;
- the title and "year · authors · journal";
- **Open PDF** (with the system application), **Open in Zotero** and **doi ↗**;
- the strip with **Read** (checkbox and date), **Cited**, **Source** (drop-down) and Added (read only): each change is saved at once;
- the **tags**, as chips with "×", and an **Add tag** selector (see "Record");
- the **abstract** (the `Abstract` or, if missing, Zotero's) in three lines, with "see more";
- the **note**, with the modes **Edit**, **Edit and view** and **View**.

## Ticking several rows

Each row has a checkbox on the left. When you tick one or more, next to the filters you get "N ticked", **Add to a collection**, **Change type...** (pick a type and set it on all the ticked rows at once; if any has a Zotero record, the **Also change it in Zotero** box, off by default, changes it in their records too) and an "×" that clears the selection. They can be rows of papers and books at once. Ticking does not open the panel. See "Collections".

## Shortcuts

With the table focused: ↑ ↓ to move (with the panel open, the panel follows the row), ↵ opens the panel, **L** and **C** tick or untick Read and Cited for the row.

## Editing and moving

**Folder, Filename, Pub., Obs., Abstract** and the rest are edited in the **Full record**. Changing Folder or Filename **moves the PDF** (or the split book's folder), its note, the path of the linked attachment and the Zotero collection. Before touching anything it checks the name, that the folder exists, that there are no clashes and that Zotero responds; if the spreadsheet fails, the PDF and the note go back. If Zotero is not configured or does not accept the write, the PDF stays moved and you are told (do it by hand in Zotero).

**Moving by hand works too.** If you move a PDF already brought in to another folder of its root from Finder or Explorer (or a split book's folder), BIBLOS notices a few seconds later, and also when it opens: it looks for that name in the other folders (in the papers folder, the root and one level; in the books folder, at any depth) and, if it is in **just one**, it updates the row's folder (it goes into the History), its note and, with Zotero, the attachment's link and the collection (created if missing). A notice says so on whatever page you are on ("2 PDFs moved by hand: brought up to date"). If the name is in two folders or in none, nothing is touched. With Excel open it writes nothing and tries again after 10 minutes or with the next change in the folders; if Zotero does not accept the change, the spreadsheet stays updated and the notice says so.

If a write fails (Excel open, the row changed outside), you are told and the row goes back to what the spreadsheet says. With Excel open, a window, "biblio.xlsx is open in Excel", appears when you enter and, after **Got it**, a red notice at the top and an amber line next to each button that writes (switched off); when you close the file, everything returns by itself (see "Excel open" in Intake).

## Export

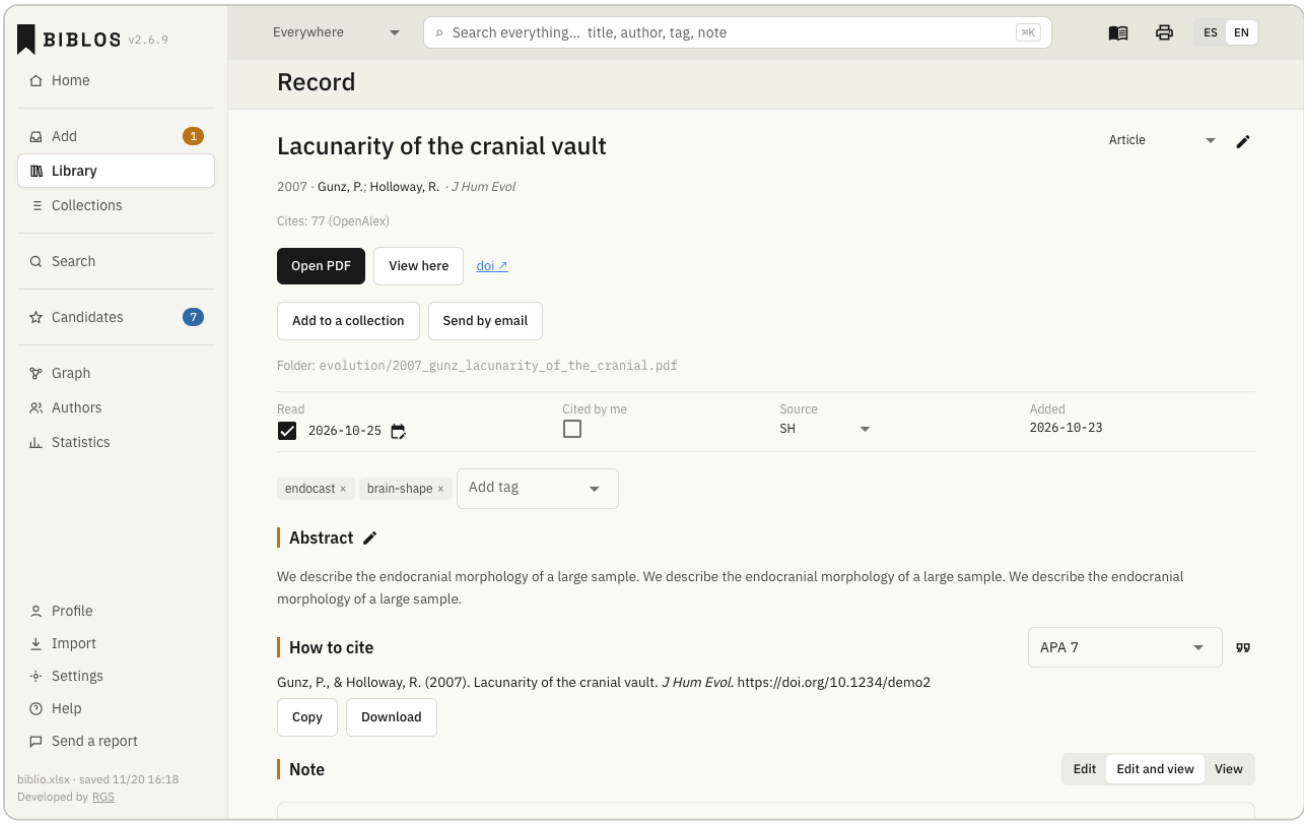
**Export**, in the header next to the page's buttons, saves what you see to an **.xlsx** (Excel) or **.csv** file. What is visible comes out, in the table's order (with the type filter, the chips and the header text applied); if you have ticked rows, only the ticked ones. The window asks where to save it and the file is named `biblos-library-YYYY-MM-DD` (with today's date). In the .csv the separator is `;` and decimals use a comma in Spanish, and `,` in English; titles come out without formatting (no italics or subscripts) and anything starting with `=`, `+`, `-` or `@` gets a `'` in front, so the spreadsheet does not take it for a formula. With no rows to export, it says so and saves nothing.

**Filters when you come back.** If you open a Record and return with **← Back** or the back button, the table keeps the type, the filters and the order; entering from the menu, it starts clean (see Getting started).

## Print

**Print** brings out all the filtered rows, not only the ones in view, with every column fitted to the width of the paper and without the menu or the header. On closing, the table is back as it was. Long titles are cut as on screen.

# 6 Record




— Record of a paper

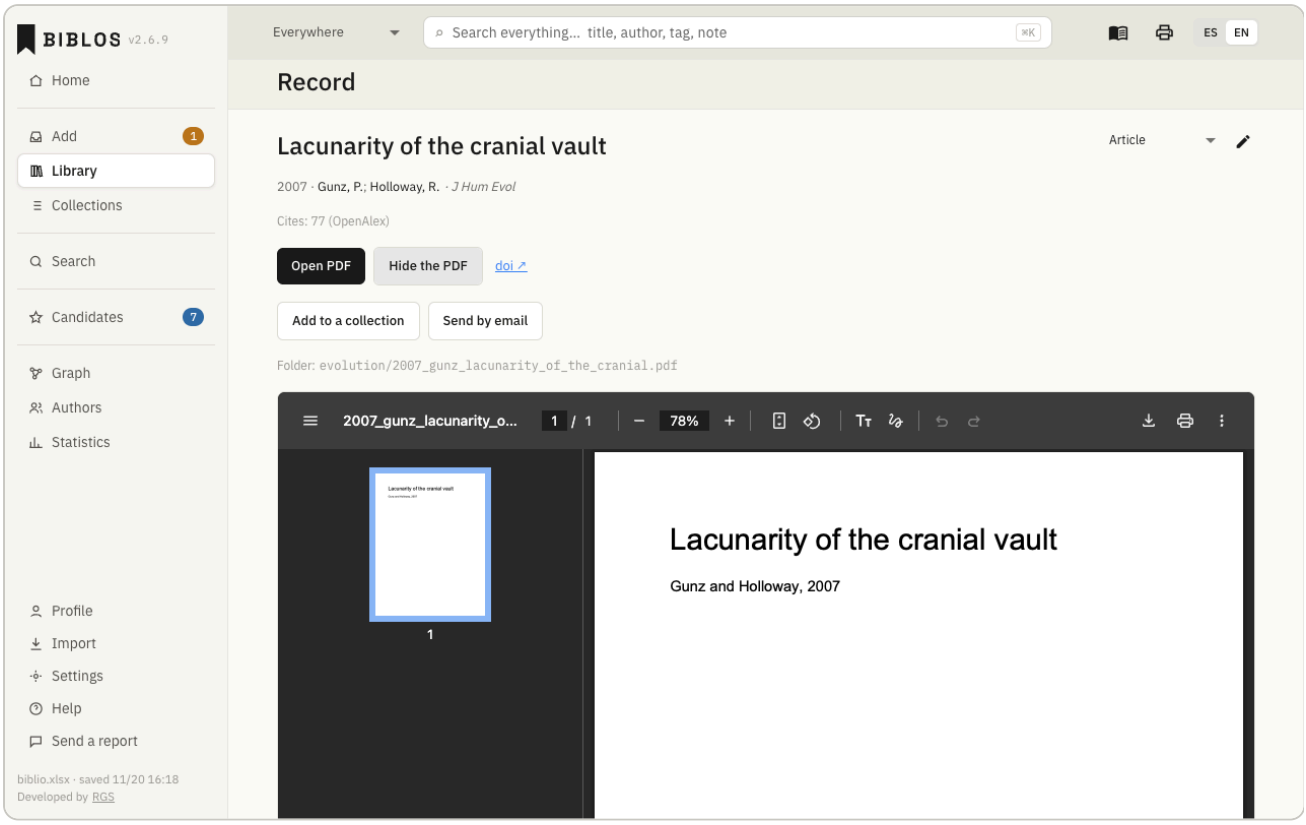
You get here with **Full record** in the Library panel, with a click on a Search result or with a paper's title in the Graph panel. The top bar has **← Back**. It is the same record as the Library panel, as a full page and in **a single column**, with the same blocks (the whole abstract and the taller note). From top to bottom: header, strip, tags, abstract, note and, at the end, **Data in biblio.xlsx**.

## Header

Whole title (with its italics, subscripts and small caps, if it has any) and, next to it, its record **type**; year, authors, journal, links **Open PDF**, **Open in Zotero** and **doi ↗**, and the file's path, with **Folder:** in front; with a PDF, **View here** opens it inside the Record itself, under the header, and **Hide the PDF** closes it (it stays open when you save). A row with no file carries the **Missing PDF** chip and, instead of the path, a notice: when you put the PDF in its folder, Add will complete it (the authors, journal and abstract come from the Zotero cache; without it, from the spreadsheet). Each author is a link to their page in **Authors**; with more than 20, **show N more** and **show less**. The **pencil** in the header unfolds Title, Year and First author so you can edit them; they are saved with **Save changes** (below). Under it, the strip with Read, Cited, Source and Added, which saves at once, as in the panel.

Under the year, authors and journal, a paper carries the line **Cites: N (OpenAlex)**: how many times it has been cited, according to OpenAlex (a dash if OpenAlex has not given the figure yet; a DOI is needed). It updates itself every 30 days. In the strip, **Cited** means “Cited by me”: you cited it in a work of your own, not the

citations it receives. The **Read** date is changed in the full Record with the calendar button (“Change the reading date”): pick a day (up to today, never a future one) and it is saved at once; on an unread row, picking a day marks it read on that day. To remove the mark, use the checkbox.




— The Record with the PDF open

## Tags and abstract

**Tags** (papers and books): chips with “×” and an **Add tag** selector that suggests the vocabulary of all your lines, ticked or not (see Profile), or lets you type a new one. **Each change is saved at once** in the spreadsheet and in Zotero: in Zotero the `t_*` tags the record already had are kept, and a removed tag is deleted there too. Without a `Zotero key`, without Zotero or with a Zotero error, the spreadsheet stays written and you are told (without Zotero keys you are told nothing).

**Abstract**: label “Abstract”, highlighted, with its pencil and the whole text (the `Abstract` or, while it is empty, Zotero's). The pencil opens the `Abstract` field (books do not have it), which is saved with **Save changes**. If it is empty and the row has a DOI, **Find abstract** fetches it from OpenAlex (or, failing that, Crossref) and saves it; if it finds nothing, it says so and writes nothing. To fill them all at once: Settings > Fill in missing data; it also fills `Authors`.

## Note

Label “Note”: text in Markdown, with the modes **Edit**, **Edit and view** (editor and preview, one above the other; the default) and **View**. It **saves itself** 1.5 s after you stop typing and also when you leave the page (or with **Save note**); if you leave it empty, the file is deleted. If the note **changed outside the app** while it was open (another machine), it is not overwritten: a dialog shows both versions and you choose **Keep mine** or **Use the one on disk**.

## How to cite

A block titled **How to cite**: a format selector (APA 7, MLA, Chicago author-date, Harvard, Vancouver, IEEE, plus BibTeX and RIS), the reference already built from the row's data and Zotero's and, if there is no Zotero record, from Crossref through the DOI, and two buttons: **Copy** (“Citation copied.”) and **Download** (saves the reference to a file). APA is the default. The format you choose is remembered **for this record** (the others keep their own; each collection remembers its own, see “Collections”), and the Record's email opens with it. The journal styles you have added come at the end of the selector, after a line. The quotation-mark button next to the selector opens **Add citation style** with this record's journal (see “Settings > Citation styles”); the added style is then chosen.

## Collections and email

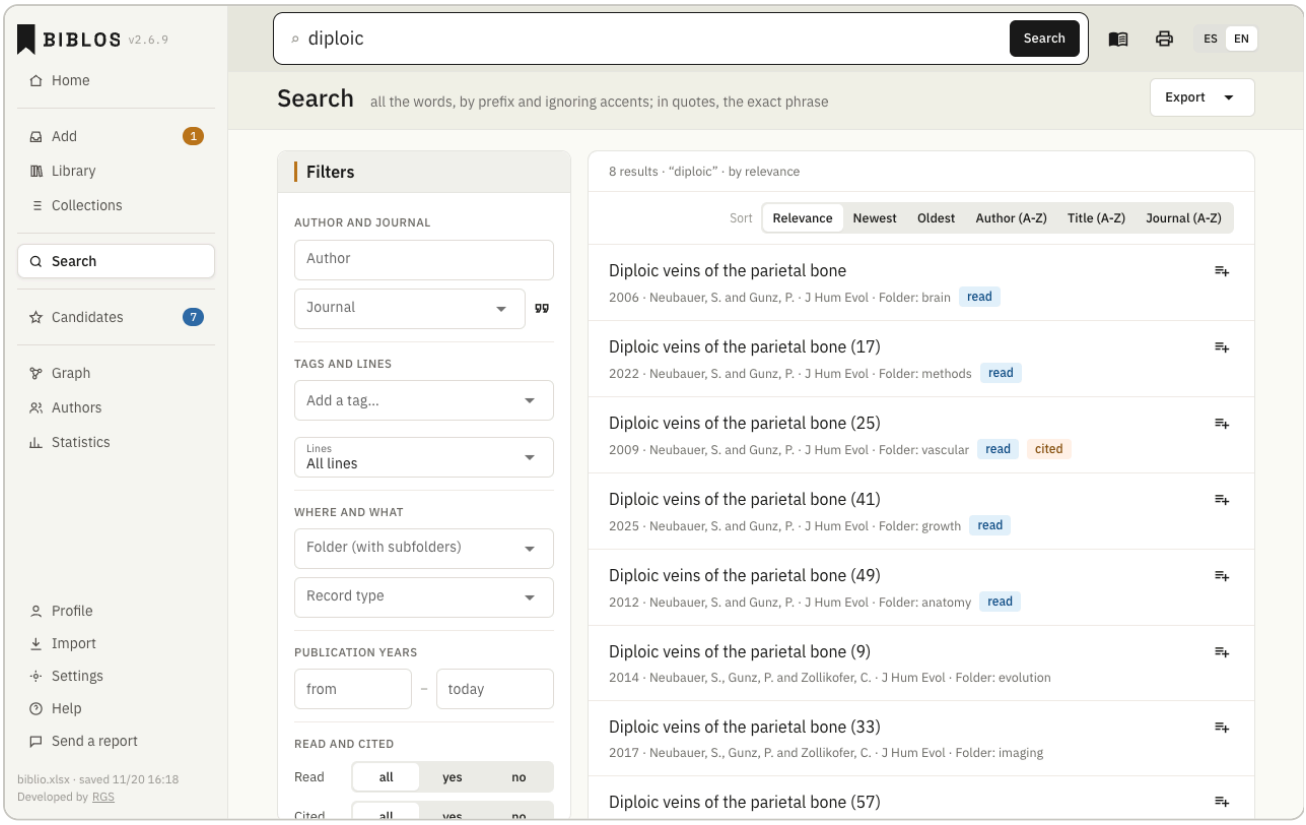
Next to the header links, two buttons. **Add to a collection** opens a window to pick an existing collection or **New collection...** (see “Collections”). **Send by email** sends this record's reference to the address you type, in the format you choose (to begin with, this Record's; changing it there does not change the Record's) and, if you want, with a BibTeX or RIS attachment or with the record's PDF (**Attach the PDF**, up to 20 MB; if it is bigger, the window says so and does not attach it); it needs the notification email set up in Settings > Notification email. It goes out with the subject “BIBLOS: reference “...””, looking like the Candidates one and signed at the foot with “Sent by: BIBLOS” and its version, and “Developed by” with its author's initials below.

## Data in biblio.xlsx

After the note: the columns not already shown above (Pub., Obs., DOI, Zotero key, which without Zotero is hidden while empty, Authors, Folder, Filename and Added, the last one read only; in books, Folder, Filename, Obs., Zotero key and Added). **Save changes** writes those and the ones edited above (header and Abstract), with the same moving rules described under Library. On a **Missing PDF** row, changing the folder moves nothing and the file name cannot be edited: Add sets it.

The **Record type** (Type) says what kind of record it is: journal article, book, book chapter, conference paper, thesis, report, preprint, etc. It is chosen from a drop-down, for every type (Book included): changing it changes the fields of the record, and does not move the PDF. To change several at once, **Change type...** in Library. When you add a record, BIBLOS takes it from Zotero or OpenAlex.

# 7 Search




— Search page

A large text box, a **Search** button and, below, two cards: on the left, the filters, and on the right, the results. **⌘K** (on Windows, **Ctrl K**) puts the cursor in this box from any page.

## How it searches

The **text and the Author search as you type**, once 0.3 s pass without typing; **Search** and Enter search at once, and so does changing Tag, Folder, Type, Read or Cited. The Years only with Enter.

**Text**: all the words, by prefix and ignoring accents, in title, authors, journal, abstract, tags and your own notes. Authors come from the Zotero cache or, without it, from the `Authors` column (or `First author`), and the journal from the cache or from `Pub.`; the Author filter works without Zotero. With text, it sorts by relevance (first those that most resemble what you type); without text, by year, newest first (**Sort**, below, changes it). If one of the words is a year ("Bruner 2015"), the year **filters**: the works of that year come out (crossed with the Years range, if set); a year on its own, with no other words, is searched as text. 200 results come at a time (change it in Settings > Preferences) and **Show more** brings the next ones.

**Exact phrase.** Between quotation marks ( `"…"` , `«…»` or `“…”` ) it looks for the words together and in that order, whole (no prefix). You can mix it with loose words: `"human skull" 2015` or `"vascular" bruner`. An unclosed quotation mark is ignored and what you typed is searched as loose words. A year between quotation marks is text, not a years filter: `"2015"` looks for 2015 written in the record.

## Suggestions in the header

On the other pages, the header box, with **Everywhere** chosen (the default), suggests as you type, from two letters on: titles, authors and tags that start with that text (or one of their words), ignoring accents and case. A title opens its Record; an author or a tag opens this page with that filter; **Author·year** (when what you typed matches an author with works from that year) opens this page with the author and the year. Choose with a click or with ↑ ↓ and Enter; Enter without choosing searches the text and Esc closes the list. Its selector also takes you elsewhere: see “Searching with ⌘K”, in Getting started.

## Filters

Always visible, in a card on the left that stays in place as you scroll the results. A “Filters” band heads it and, as soon as any filter is set, shows **Remove filters (N)** with how many there are. They come in five labelled groups: **Author and journal** (Author and **Journal**), **Tags and lines** (Tag and, with more than one line in the profile, Lines), **Where and what** (Folder, which includes its subfolders, and record Type, the ones in your library), **Publication years** (from – to) and **Read and cited** (two segmented controls, each on its own row: All, Yes or No). **Tags add up**: each one you choose stays as a chip with “×” and the documents carrying **any** of them come out (OR). **Remove filters** empties them all at once; with no results, it also shows in the notice. Clicks from Statistics and the Graph arrive here with the filter already set; from Statistics, with a years range, also the **incl. undated** chip (the years filter lets rows with no year through, as there; remove it to see only dated rows). If you type a year in the box (“Bruner 2015”), undated rows do not come out.

**Lines**, in the Tags and lines group (only with more than one line in the profile), has the same selector and rules as the Library filter: a record gets in if it has any tag of the chosen lines. It combines (AND) with the tags: it must meet both. **← Back** and **Export** keep it.

**Journal** is a drop-down with your library's journals, by name and each with its number of records (“J. Anat. (12)”; the number follows the chosen record type and class). A journal of more than 60 characters shows cut with “…” (the full name on hover). Type in it to search, ignoring accents, case and dots (`anat` finds “J. Anat.” and “Anatomía”). Picking one filters **that exact journal**, looking at both journals a record can have, the one in **Pub.** and Zotero's; the “×” removes it. Coming from Statistics, the journal arrives already picked; if it is no longer in your library, it shows anyway, with (0).

From Statistics there also come filters that do not fit in the column and show as removable **pills** above the results: **Affiliation: Name ×** (the works with that institution, per OpenAlex and by DOI) and **Source: X ×** (the `Source` column). Remove them with their “×” (or with **Remove filters**); they also count when you come back and when you export.

If you return from a Record with **← Back** or the back button, Search keeps the text and the filters; entering from the menu, it starts empty.

The **Record type** filter shows one kind of record: journal article, book, book chapter, conference paper, thesis, etc. (only the types in your library are listed). If you arrive with the **Papers** scope (everything that is not a book) or **Books** from the header selector, a chip with that class also shows, which you remove with its ×.

## Results

They go in their own card, to the right of the filters. At the top, a grey line says how many there are, what you searched and the order (“12 results · “bruner” · by relevance”). To its right, **Sort**: **Relevance** (the button only appears with text typed), **Newest**, **Oldest**, **Author**, **Title** and **Journal**. Author, Title and Journal go from A to Z

ignoring accents and case, and those without that data come last. Without text, newest come first by default; with text, by relevance. **Relevance** counts how many times your words appear and how rare they are in your library, and gives more weight to the title and authors than to the abstract or the note; hover over the button to see this criterion. The order you choose comes back with you when you return from a Record with **← Back**, and **Export** follows it.

Each result carries the title, a link to its Record, with “year · authors · journal · Folder: name” below (up to three authors and “et al.” if there are more; a journal of more than 60 characters is cut with “…” and the full name shows on hover) and, beside it, the **read** and **cited** pills when they apply (cited means “cited by me”); on hover, the whole entry changes background. A title with formatting (italics, subscript…) is shown with it. If a text was searched, the result says **where it was found** (ABSTRACT, OWN NOTE, TAGS, AUTHORS or JOURNAL) and shows a snippet with **what was found highlighted**.

**A click anywhere on the result opens its Record**, not only on the title; it does not open if you press the collection button, a link or a pill, or if you have text selected. To open it in another tab, use the title, which is still a link; with Ctrl (⌘ on Mac) and a click on the row, the Record opens in the same tab.

To the right of each result, an icon (**Add to a collection**) opens the window to put it in a collection (see “Collections”).

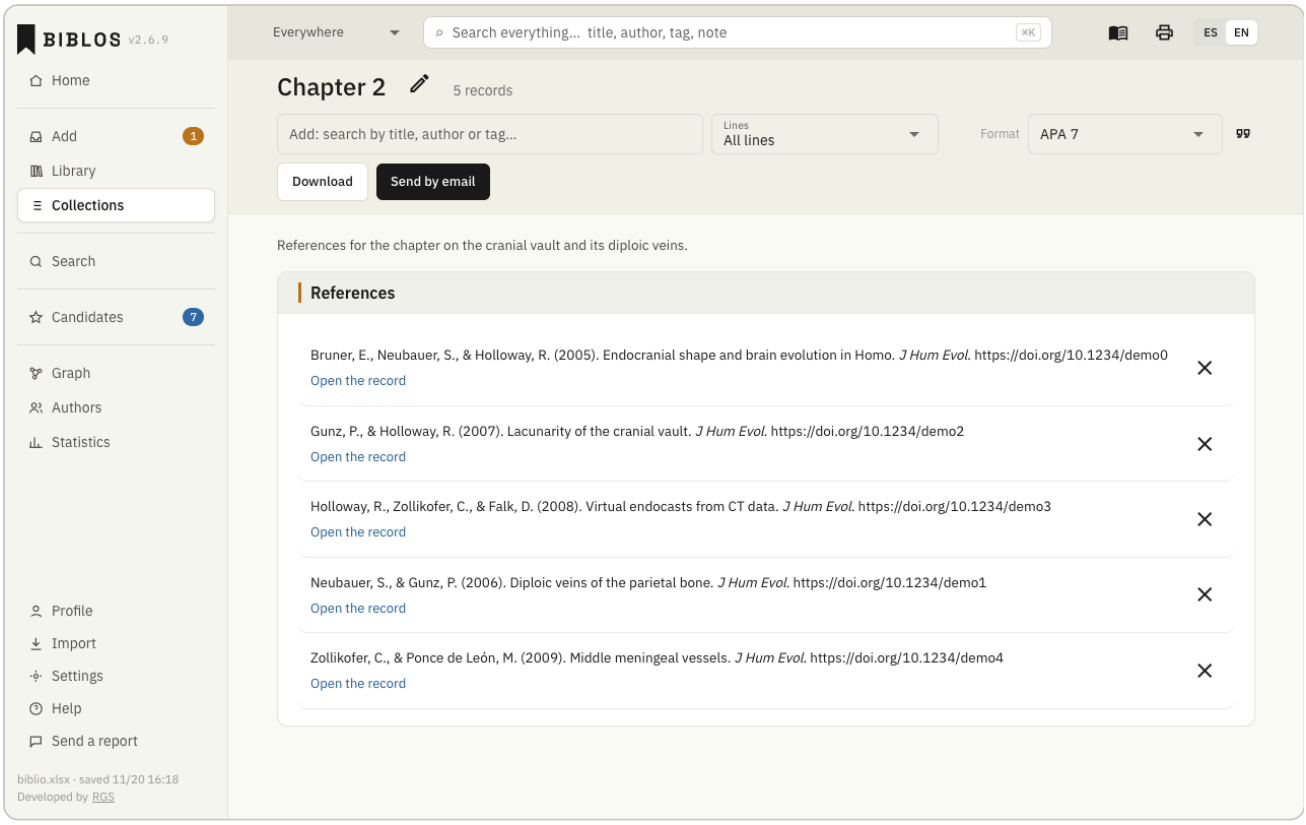
## Export

**Export** saves to an **.xlsx** or **.csv** file all the results of the search with its filters, not just the ones shown on screen. The last text you searched is what is exported: what you typed without searching yet does not count. File name ( `biblos-search-YYYY-MM-DD` ), separators and formulas: as in Library. The window asks where to save it.

## In the manual

When you search for a text, the manual sections that match also appear at the top, under **In the manual**; a click opens that section in Help.

# 8 Collections

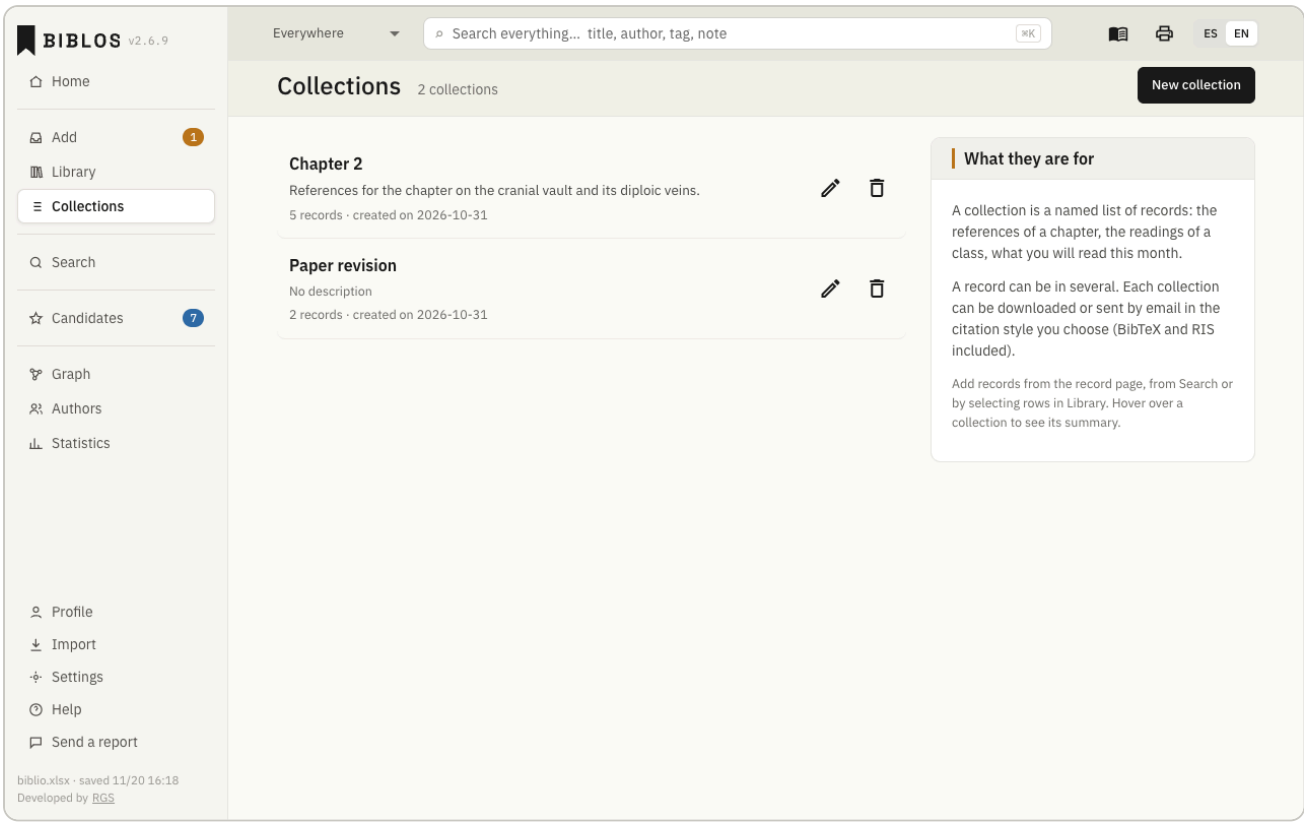



— Page of a collection, “Chapter 2”, with five papers

A **collection** gathers the records you want at hand for something specific (a chapter, a paper you are writing, a class) and gives them to you cited in one go. It lives **only in BIBLOS**: it is not a Zotero collection and creates or changes nothing there. Putting a record in a collection does not move or modify it; one record can be in several.

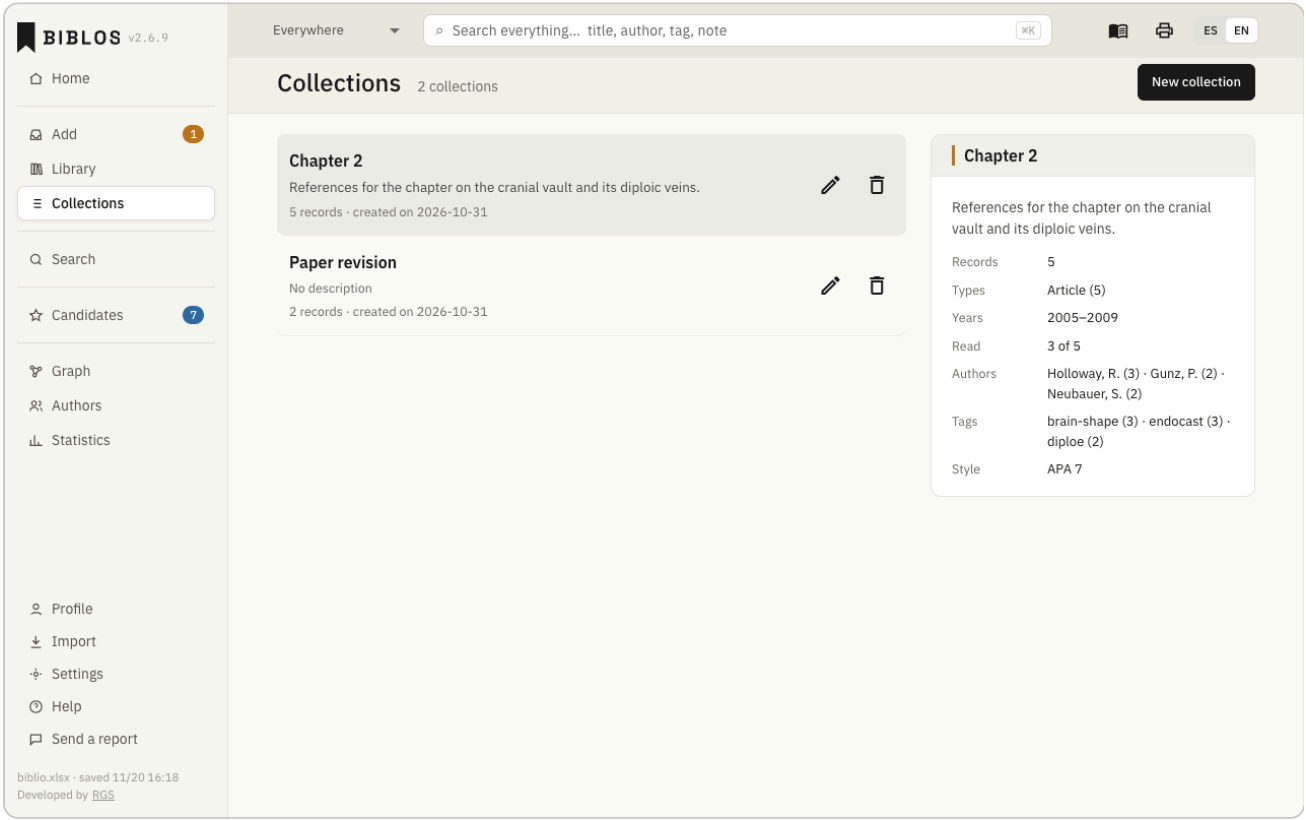
## The Collections page

In the menu, **Collections**, after Search. At the top, how many there are and **New collection**; if there are none yet, a text says so. On the left, a row per collection: the name, its description (or “No description”, in grey), how many records it has and when it was created, with a **pencil** (**Edit name and description**) and **Delete**. On the right, the **What they are for** column explains in a few lines what a collection is and how to fill it; in a narrow window it drops below the list.



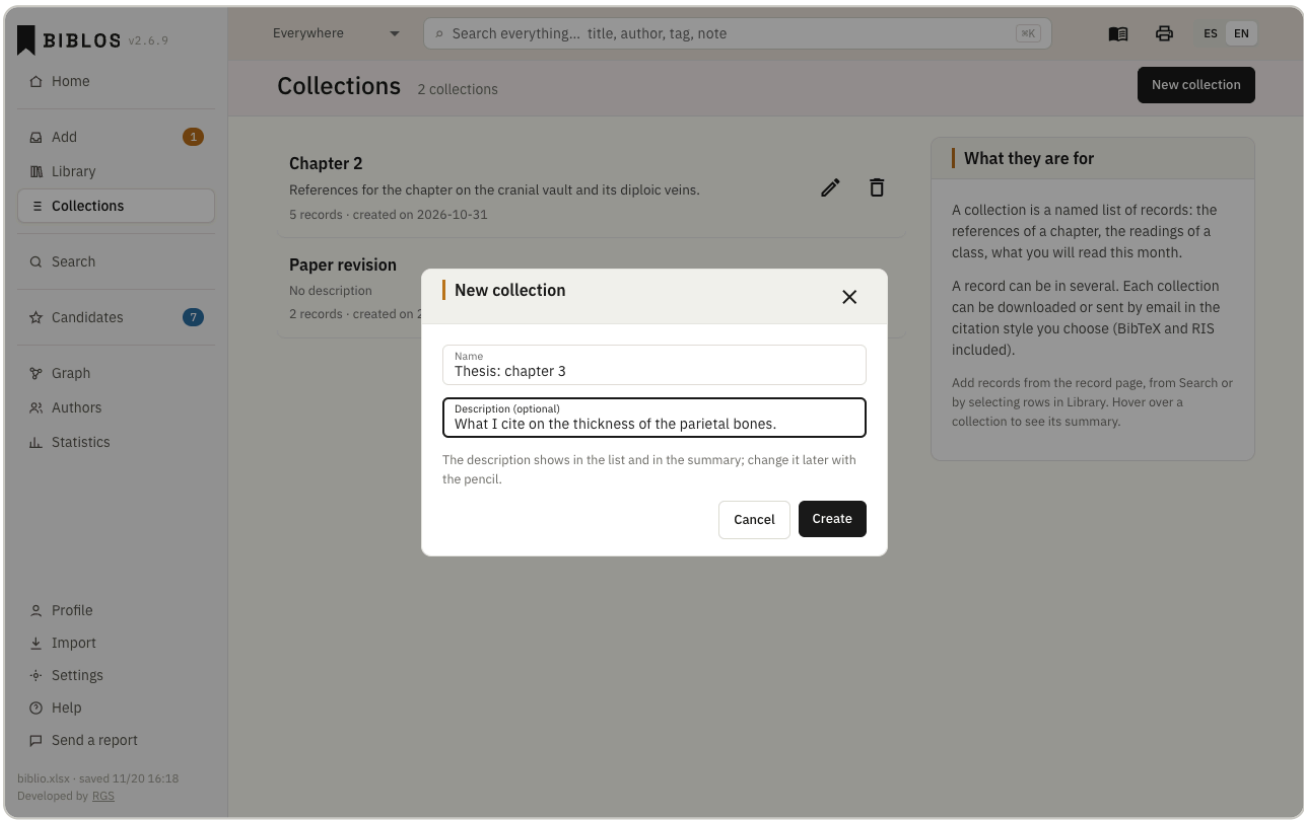

— The list of collections, with “What they are for” on the right

When you **hover over a collection**, that column shows its summary: the description (if it has one) and **Records**, **Types** (by kind of record), **Years** (from the first to the last), **Read** (“N of M”), **Authors**, **Tags** and **Style** (the collection's citation format). When you move the mouse away, “What they are for” returns.




— The summary of a collection on hover

- **New collection** asks for a name and, if you want, a **description** (optional, up to 300 characters: what it is for, a chapter, a class…; it shows in the list and in the summary). **Create** creates it and takes you to it. The name is required, up to 100 characters, and cannot be repeated (case and accents are ignored).
- The **pencil** (**Edit name and description**) changes the name and the description.
- **Delete** asks you to confirm (“Delete the collection …? The records are not touched”): only the collection goes away, never the records.




— The New collection dialog, with name and description

A click anywhere on the row opens the collection (except on the pencil and on **Delete**); the name is in bold.

## The page of a collection

From top to bottom:

- **The title**, with a **pencil** beside it to edit the name and the description (the same as the pencil in the list of collections); the description, if there is one, shows under the title.
- **References**: a single list with every record of the collection, each in the chosen format. A click anywhere on the reference opens its Record (except on links and the “×”; it does not open with text selected, so you can copy it); for another tab, the title is still a link. Each reference carries an **×** on the right (**Remove from the collection**). If a record is no longer in the library (you deleted it or imported again), it comes at the end, in grey and as **No longer in the library**, with no link; a counter at the top says how many, and they are removed just the same with their “×”. They can be read or copied as they are. **Print** (at the top, as on the other pages) prints the page.
- **The bottom row**, with everything that acts on the list: the **Add** box (“Add: search by title, author or tag…”), which from two letters offers up to 12 records of the library, each with its button to add it (if it is already in the collection, it says so; if nothing matches, “Nothing with …”); the **format**, a selector (APA 7

by default; each collection remembers its own) with the six styles (APA 7, MLA, Chicago author-date, Harvard, Vancouver, IEEE) plus BibTeX and RIS and, after a line, the journal styles you have added (the quotation-mark button next to it opens **Add citation style**; see “Settings > Citation styles”); **Download**, which saves the references of the whole collection to a file in that format, with its extension (`.bib` for BibTeX, `.ris` for RIS); and **Send by email**.

- **Lines**, in that same row: the filter by line (a selector with checkboxes, as in Library, only with more than one line in the profile; a record gets in if it has any tag of the chosen lines). With a filter on, the list, the count, **Download** and **Send by email** use only what you see; records that are no longer in the library do not show, and if none belongs to those lines, a text says so.
- **Send by email** opens a window with **To** (the address; BIBLOS remembers the last one), the **Reference format** (to begin with, the collection's; changing it there does not change the collection's), an **Attachment** (BibTeX, RIS or none) and **Send**. It says “Sent to …” or why it did not go out. If email is not set up yet, the window says so and points to **Settings > Notification email**. The email goes out with the subject “BIBLOS: collection “…””, looking like the Candidates one, signed at the foot with “Sent by: BIBLOS” and its version, and “Developed by” with its author's initials below.

## How a record is added

- **From the Record** (and its panel in Library): the **Add to a collection** button.
- **From Search**: the icon on each result.
- **From Library, several at once**: tick the checkboxes of the rows (papers and books together) and press **Add to a collection** in the bar that appears next to the filters.
- **From the collection itself**: with its **Add** box.

In the first three a window opens: you pick a collection or **New collection…** (it creates it with the name you type and, if you want, a description). Collections that already hold everything you are adding show “already in”, and the window offers by default the first one that does not. When done it says “Added to …” or “Already in …”.

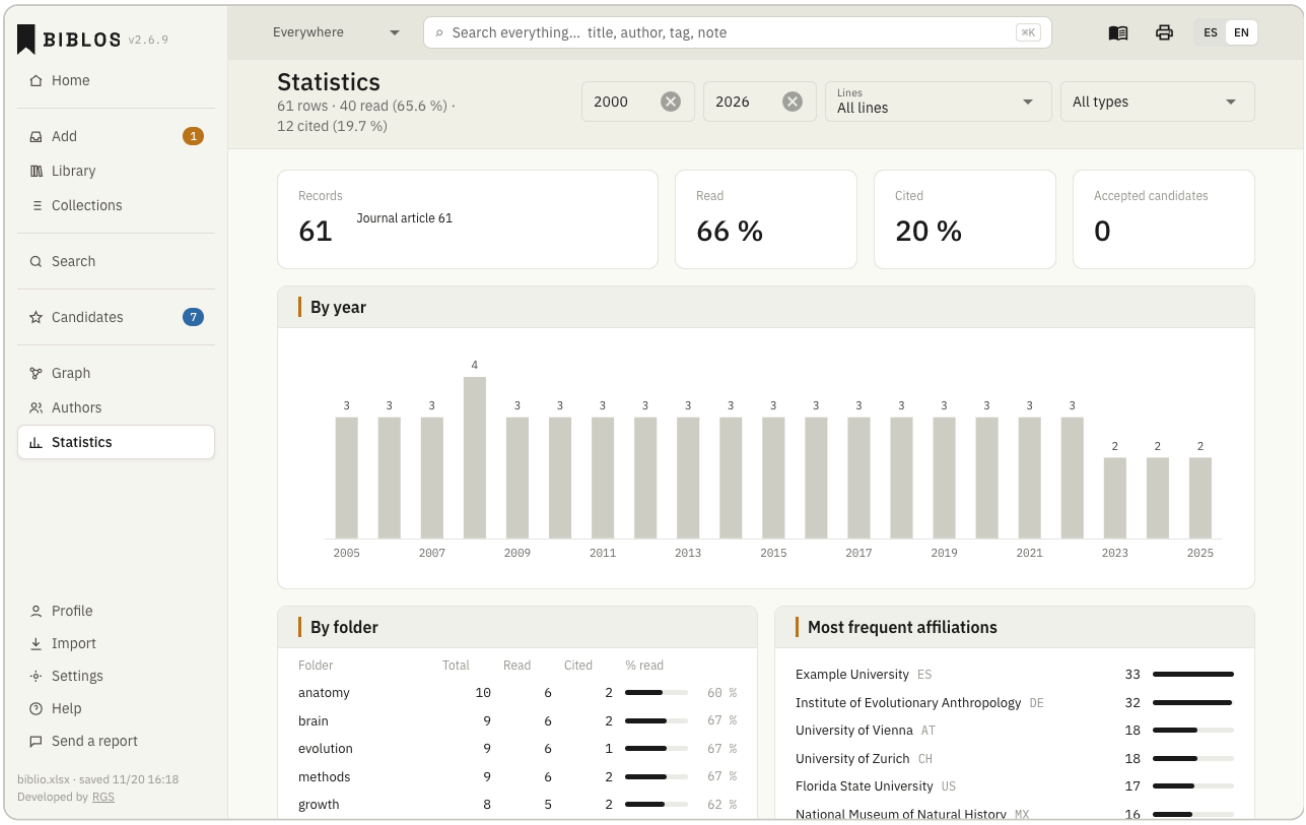
## What happens if a record changes

A collection **follows the record**: if you move it to another folder or rename it (from the Record, when reorganizing or importing), it stays in its collections. If the record is lost altogether, it comes at the end of the References as “No longer in the library”.

## Limits

- References come from the row's data and Zotero's and, without a Zotero record, from Crossref through the DOI. If data is missing (authors, journal), the reference comes out with what there is: check the important ones before handing them in.
- Two works by the same author and year are not told apart with a letter (“2020a”, “2020b”): the reference generator BIBLOS uses does not do it. If you need it, add the letter by hand.
- Collections are kept in BIBLOS's data folder; they do not travel with the spreadsheet or with Zotero.

# 9 Statistics




— Statistics page

## Header and cards

Under the title, on a line of its own, the count (records and so on; it only breaks between one piece and the next, never inside one) and, on the right, two **year (from, to)** boxes, by default from 2000 to the current year, and the **Type** filter (it starts on All types and lists the ones in your library; whatever a type does not have is hidden). The year range keeps only the rows of those years (inclusive) in the spreadsheet totals and charts (not in the candidates); rows without a year always count, and an empty box leaves that side unlimited. The charts go in **two columns**, each card tucked under the one above with no gaps, and none is split between columns (they read by columns, not by rows); when printing, in a single column. Four cards: **Records** (wider, two columns: the figure and, to its right, with All types, how many there are of each type, each one with its click to Search; with one type chosen, just its total; under 900 px wide, the breakdown drops below the figure), **Read** %, **Cited** % and **Accepted candidates**.

With more than one line in the profile, the **Lines** selector (with checkboxes, as in Library) trims what the totals, the charts, the authors and the affiliations count to the records of those lines (the ones with any tag of theirs); candidates, by their line. With none ticked, it counts everything. Clicks to Search carry the chosen lines too.

## Charts

For the chosen type:

- **By year** of publication, as bars (with zeros; the **current year** is black and the others light grey; separately, “+ N without a year”; the year is always written in full, “2005”, and with many years the labels are spaced out so they do not overlap). Each bar carries its total on top; hovering over it shows how many records of each type there are that year (“Journal article: 3”, “Book: 1”).
- **By folder**: a **table** with total, read, cited and a % read bar; each folder is a link to a filtered Search. It is **sorted** by clicking a header (Folder, Total, Read, Cited or % read; another click reverses the order, with ▲ or ▼); with nothing chosen, it goes by total.
- **Most used tags** (the top 15, without Zotero's `_…`), **By Source** and **Top 15 journals**.
- **Additions and readings by month or by week**: a **Month / Week** segmented control (ISO weeks) and two dates (from, to) that limit only this chart. Addition = `Added` or, without it, the file's creation date; reading = the `Read` date.
- **Candidates by source**: found and accepted.
- **Authors**: a ranking of who signs most of what you have, with a segmented control: **In the library** (rows of each author), **Read**, **Cited by me** and **Citations** (the sum of the OpenAlex citations of their rows). Each name links to their page in Authors. For books only the first two apply.
- **Most frequent affiliations**: the institutions that appear most among the authors, with their country, according to OpenAlex and through each row's DOI; each work counts once per institution. A note says how many rows have data.

## Click to search

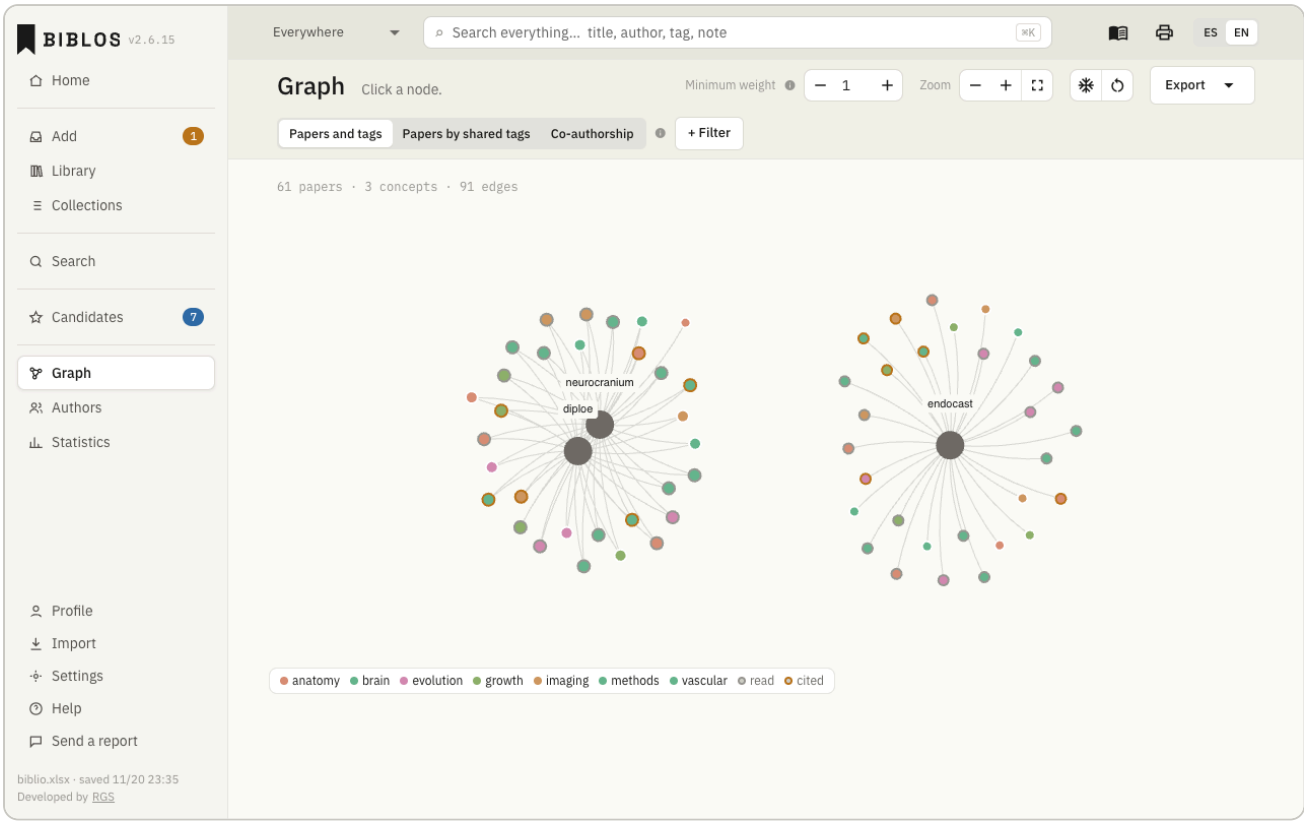
A click on the bar **or the name** of a year, a journal, a tag or a Source, on a folder, on a type in the Records breakdown or on an affiliation opens **Search** with that filter, the type you have chosen and the years range in the header (the journal goes between quotation marks, so it is exact). Source and affiliation show in Search as removable pills (“Source: X ×”, “Affiliation: Name ×”). Authors lead to their page; candidates by source lead nowhere, because they are not library rows. **← Back** takes you again to Statistics with the settings you had (years, type and filters).

Since Statistics counts rows **with no year**, the search a bar leads to (except a year's bar) brings them too: Search shows the **incl. undated** chip; remove it with its “×” to keep only the rows with a year. That way the bar and the search give the same count.

## A journal's citation style

Next to each journal in the list there is a quotation-mark button: it opens **Add citation style** with that journal and looks for its style in the official CSL style repository (see “Settings > Citation styles”). Filled quotation marks mean you already have a style for it. The same button sits next to the Journal filter in Search and on each journal in Profile > What to search.

# 10 Graph




— Graph page

An interactive graph (force-directed; zoom with the wheel and drag), of papers only and with nodes that have some link. The global search box (⌘K) sits on top, as on the other pages; the header has two rows. On the title row, before **Export** ▾ (see “Export”), come the **Minimum weight** (with its (i) icon), the **Zoom** and, in small icon boxes, full screen, **Freeze** and **Rearrange**; their explanations show on hover. Below, the mode row (with its (i)), with **+ Filter** and, if filters are set, their pills. The **count** (“N papers · N concepts · N edges”) sits on the canvas, top left. In a narrow window, the controls drop whole onto a line of their own between the title and the mode row. “Click a node.” reminds you how to open the panel.

## Modes

Three **modes**, each with an (i) icon beside it that explains them on hover:

- **Papers and tags**: each paper linked to the vocabulary tags in its `Tags` column.
- **Papers by shared tags**: two papers linked by the tags they share; the weight is the number of common tags, excluding the generic ones (the tags that are “parents” in your profile's vocabulary; see Profile). It opens with a minimum weight of 2.
- **Co-authorship**: authors linked by the papers they sign together (uses the Zotero cache or, without it, the `Authors` column; if that is missing too, the `First author`). It opens with a minimum weight of 2, also when you arrive from an author's page. If that author has no links of weight 2, the Graph keeps just them and their direct coauthors, at weight 1, and a notice says so (“This author has no links of weight 2…”); changing the weight, the mode or a filter brings back the whole graph. Books count here too, with their authors; the counter lists them apart (“1 book”).

## Filters and appearance

**Filters**: **+ Filter**, on the mode row, opens a two-column menu with Tag, Lines, Folder, Type, Author, Journal, Years, **Read** and **Cited by me** (these two with All, Yes or No). Each filter you set shows as a pill next to it, with its × (with no filters, no gap is left). The title row holds the **Minimum weight** (with – and + buttons; its (i) icon explains what a link weighs: shared tags, shared papers in co-authorship, and always 1 in Papers and tags), the **Zoom** (– and + buttons, which follow the wheel) and, in small icon boxes, **Full screen**, **Freeze** (on hover it explains what it does) and **Rearrange**.

**Lines** (in the **+ Filter** menu, with checkboxes, as in Library; only with more than one line in the profile; none ticked, all) makes the Graph draw only the records of those lines (the ones with any tag of theirs), and the counter reflects it; the concepts are those of these lines. The lines ticked in Profile and Candidates do not count here: only this selector. **See in Search**, in a concept's panel, takes the lines and the other filters you have set to Search.

Colour by top-level folder, size by number of links, grey edges, grey border = read, amber border = cited. The colours of topics and tags are those from **Profile > Colors**; the ones not chosen come from the default palette. A **legend** (bottom left of the canvas) says which colour each topic is and what read and cited look like; with many folders it takes several lines and, if they do not fit, scrolls inside. With more than 4000 edges it is not drawn: raise the minimum weight or filter.

## Moving the nodes

**A node you drag stays where you drop it**, even if its links pull at it: it lets you move one aside to reach the ones it was covering. The others keep following the forces and settle around it. A click without moving does not count as a drag: it selects the node, as always.

- **Freeze** (off by default; its (i) icon explains it): once the graph has settled, everything stays still, and when you drag a node only that one moves.
- **Rearrange** releases all the nodes, including the ones you placed by hand, and lays them out by forces again.

**Freeze** pressed right as you enter works too: it used to be lost and the first drag moved everything; now it is respected from the start.

**Each mode remembers its layout** while BIBLOS stays open, also when you change page and come back. If you return to a mode with the same nodes: with **Freeze**, all of them go back to their place; without it, only the ones you placed by hand. If the nodes are different (you changed a filter or the weight), the graph is laid out again. **Rearrange** forgets the layout of the mode you are looking at.

## Export

**Export ▾**, next to the title, saves the network **you see** (the mode, the filters, Read and Cited by me included, and the weight that are set), with every node where it is now. Five formats:

- **PNG image**: for a text or a slide; it comes out in high resolution (three times the screen).
- **SVG image**: vector; it scales without losing sharpness and can be edited in Inkscape or Illustrator.
- **Gephi (.gexf)** and **GraphML (.graphml)**: to carry on the analysis in Gephi, Cytoscape, yEd... Each node carries its label, type, folder, year, read, cited, degree, colour, size and position; each edge, its weight.

- **CSV of nodes and edges (.zip)**: two tables, one of nodes and one of edges, to open in a spreadsheet or in R or Python.

Images carry the legend inside and respect the zoom you have. In BIBLOS's window, the system dialog asks where to save (“Save as”); in the browser, the file is downloaded. If the graph is empty, a notice says so (“There is no network to export”).

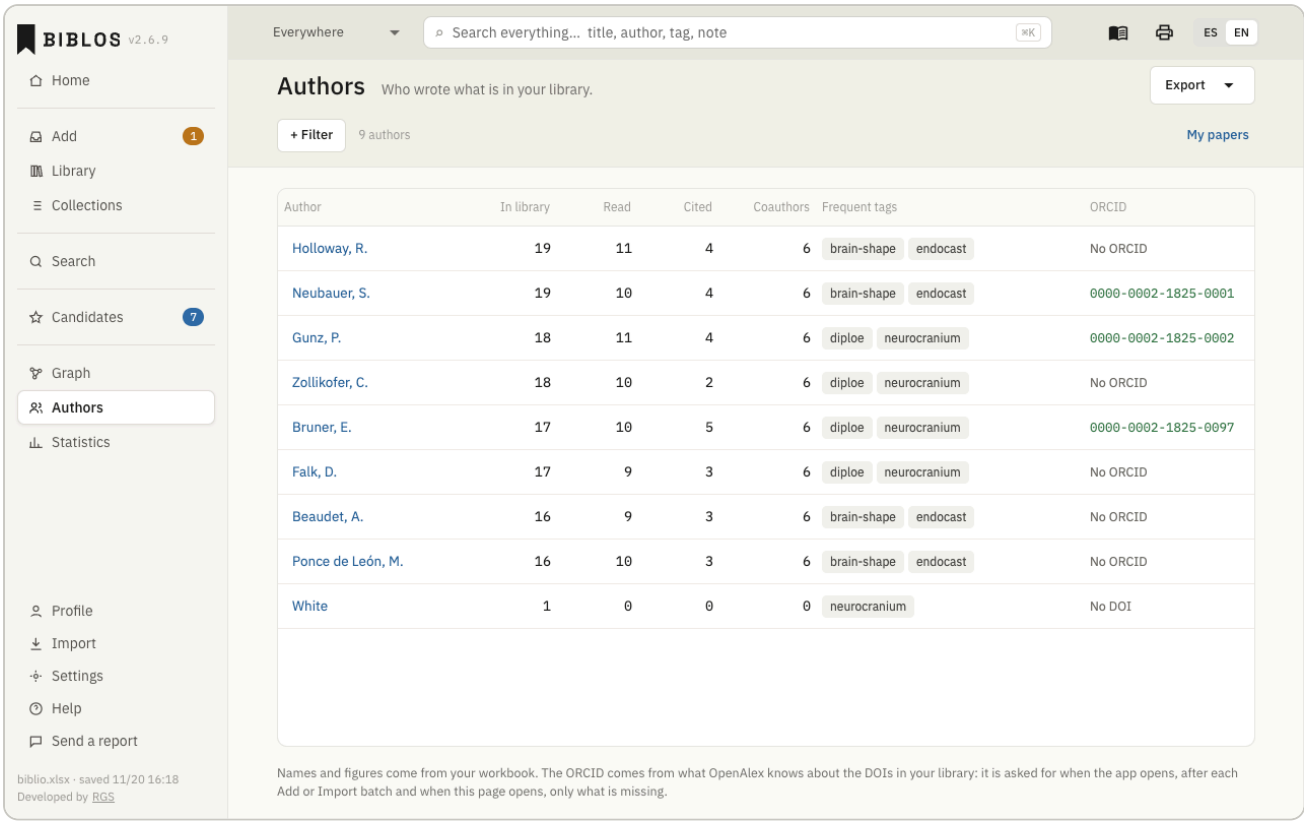
## The node panel

When the Graph opens there is no panel: the canvas takes the full width. A click on a node **selects** it (black border), **pins its neighbourhood** (the rest fades) and opens the panel on the right, which fills in: for a **paper**, abstract, tags and marks, and its title is the link to its Record; for a **concept**, **Filter by this concept** and **See in Search**; for an **author**, their papers, and their name is the link to their page in Authors. To release it: the panel's **×** or a click on the canvas background; the panel hides and “Click a node.” returns next to the title. When you arrive from an author's page, that node is already selected and the panel is open.

## Full screen

The full-screen button (on the title row, next to **Freeze** and **Rearrange**) puts the Graph over the whole window, without header or menu, and gives the canvas the most room. Leave with **Esc** or with the button in the top-right corner. Node titles and tooltips come out as plain text, without italics or subscripts. It works the same in BIBLOS's window and in the browser; in the browser it also asks the system for real full screen.

# 11 Authors




— Authors page

Who signs what you have in your library. The names and the numbers come from your spreadsheet, from papers and from books. What OpenAlex knows about each DOI in your library is saved in the background: when the app opens, after each Add or Import batch and when you open Authors if anyone shows “Not checked” (meanwhile, a notice says “Checking the ORCID in OpenAlex...” and the list repaints by itself, keeping the filter and the order). The ORCID in the list comes from there, with no request per author; whoever still shows “No ORCID” but has an OpenAlex identifier is asked about, also in the background, just once by that identifier, and the answer is kept even if it is “has none”. What you do not have is requested when you open each author's page.

## The list

The list is a table, like the Library one. Each row says how many of their documents you have (**In library**), how many you have read and cited, their coauthors, their most frequent tags and their **ORCID**: the number, which opens their ORCID page; **No ORCID** (OpenAlex knows of none); **No DOI** (their documents have no valid DOI, and without one they cannot be identified); or **Not checked** (their DOIs are not in the cache yet: it only happens at the start, or with no network). **+ Filter**, in the title strip, filters by **Name** (ignoring accents and capitals; the header box with **On this page** chosen writes it too), by **Tag** (those with any of the chosen ones) and by **ORCID** (**With ORCID**, **No ORCID**, **No DOI** or **Not checked**); each filter set stays as a chip removed with its ×, on a row of their own below the **+ Filter** one (with no filters, no gap). A click on a tag in the table filters by it: all the authors with that tag show up, and the chip is added to any already there. A click on the name opens their page. By default, those you have most of come first; a click on a column title sorts by it (another click, the other way round; the third, back to the start), and that order stays when you change the filters. They

all go in the table, with no “Show more”. **My papers** (at the top) takes you to Profile > About me, where BIBLOS shows yours and, with your ORCID, also looks for those you do not have yet (see “My papers” in Profile); on your own page, a **You** chip marks you.

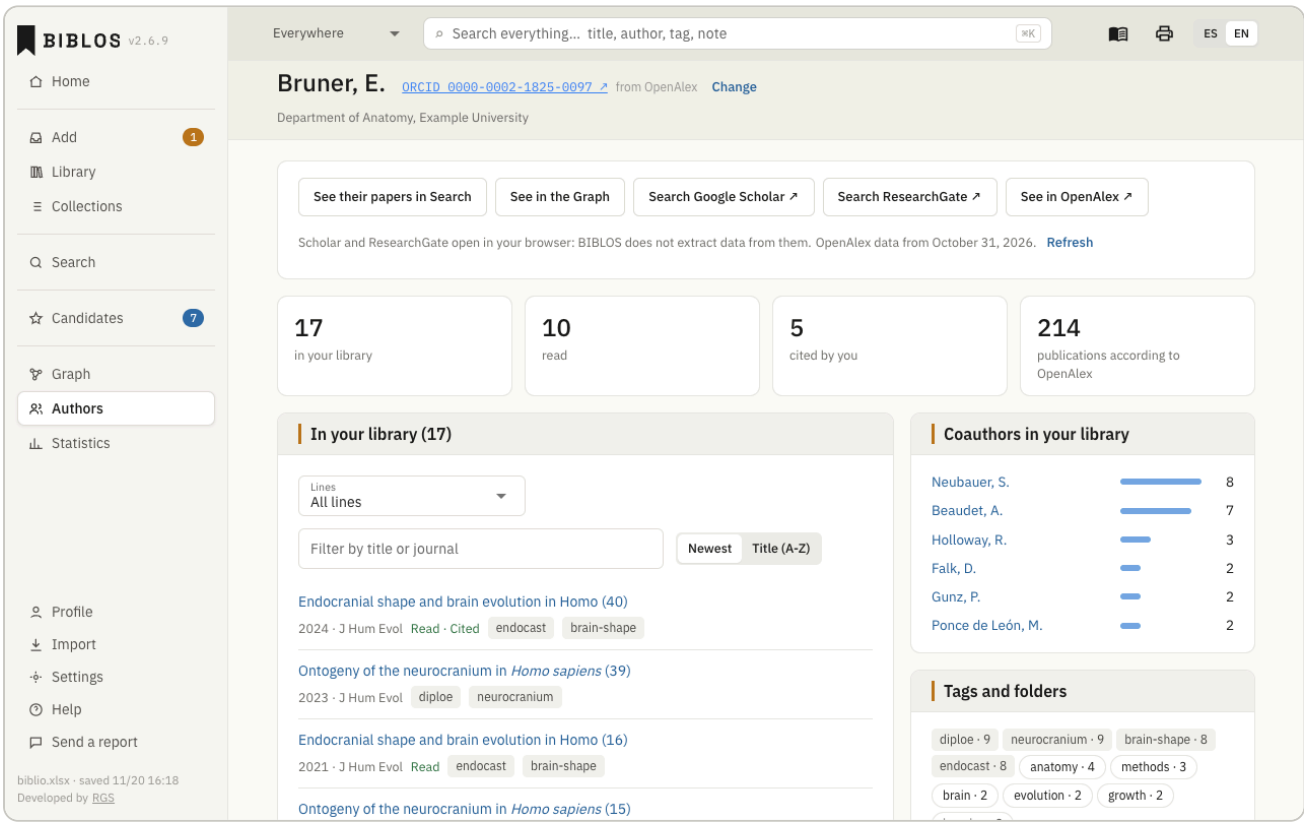
An author is their surname and initial: “Emiliano Bruner” and “Bruner, E.” are the same, in the Graph too. A surname alone, with no initial, joins the author who has it if there is only one. So “Bruner”, “Bruner, E.” and “Emiliano Bruner” come together as one author when the full name is in your library. Books carry their authors too (the `Authors` column), so they count the same as papers. Two people with the same surname and initial show up as one. All hyphens count the same: “Martinón-Torres” (with the keyboard hyphen) and “Martinón-Torres” (the one OpenAlex and Crossref write) are the same person, and a link saved with the earlier hyphen still leads to them.

## Export

**Export**, in the header, saves the table to an **.xlsx** or **.csv** file: one row per author, with the columns as you see them and in the order and filter you have (tags are joined with commas). File name ( `biblos-authors-YYYY-MM-DD` ), separators and formulas: as in Library. The window asks where to save it.

Filters and order are kept if you open an author's page and return with **← Back** or the back button; entering from the menu, it starts clean.

## The author's page




— An author's page

You get here from the list, from the authors in a document's Record or with the author's name in the Graph panel. At the top, the name, the ORCID and the affiliation. If their ORCID declares a page of their own, the name links to it; BIBLOS does not check it: it is the one that person declares. **← Back** returns you to where you were. Below, the shortcuts:

- **See their papers in Search** filters by surname, so it may bring others with the same one.
- **See in the Graph** opens co-authorship with this author selected and at weight 2, like the rest; if they do not appear at that weight, you see them with their direct coauthors at weight 1, with a notice. If they do not appear even so, because their papers have no coauthors with those filters, it says so.
- **Search Google Scholar** and **Search ResearchGate** open in your browser: BIBLOS does not extract data from them.
- **See in OpenAlex**, if OpenAlex identified them.

Then the numbers (in your library, read, cited by you and publications according to OpenAlex) and these blocks: **In your library (N)**, where a click anywhere on a document's row opens its Record (for another tab, the title is a link); **Not in your library yet (N)**, set apart, with another background and a dashed border; **Coauthors in your library**, each with a link to their page; **Tags and folders**; and **By year, in your library**.

Each publication under **Not in your library yet** has, on the right, **Add to Candidates**: it joins the Candidates list for you to review there, even if it does not reach the minimum points, and OpenAlex fills in its authors, abstract and open PDF, if it has one, from the DOI. Afterwards the button gives way to **In Candidates** or **Accepted in Candidates**. If you had discarded it, the button stays and pressing it puts it back up for review.

Each of those two blocks has its own **filter** (“Filter by title or journal”; if nothing matches, it says so) and its own **order** (“Title (A-Z)” or “Newest”); the list of what you have and the list of what you lack are filtered and sorted separately.

On the page, the **Lines** selector (with checkboxes, as in Library; only with more than one line in the profile; a document gets in if it has any tag of the chosen lines) filters only the **In your library** list. **Not in your library yet** is not filtered, and a notice says so.

## OpenAlex data

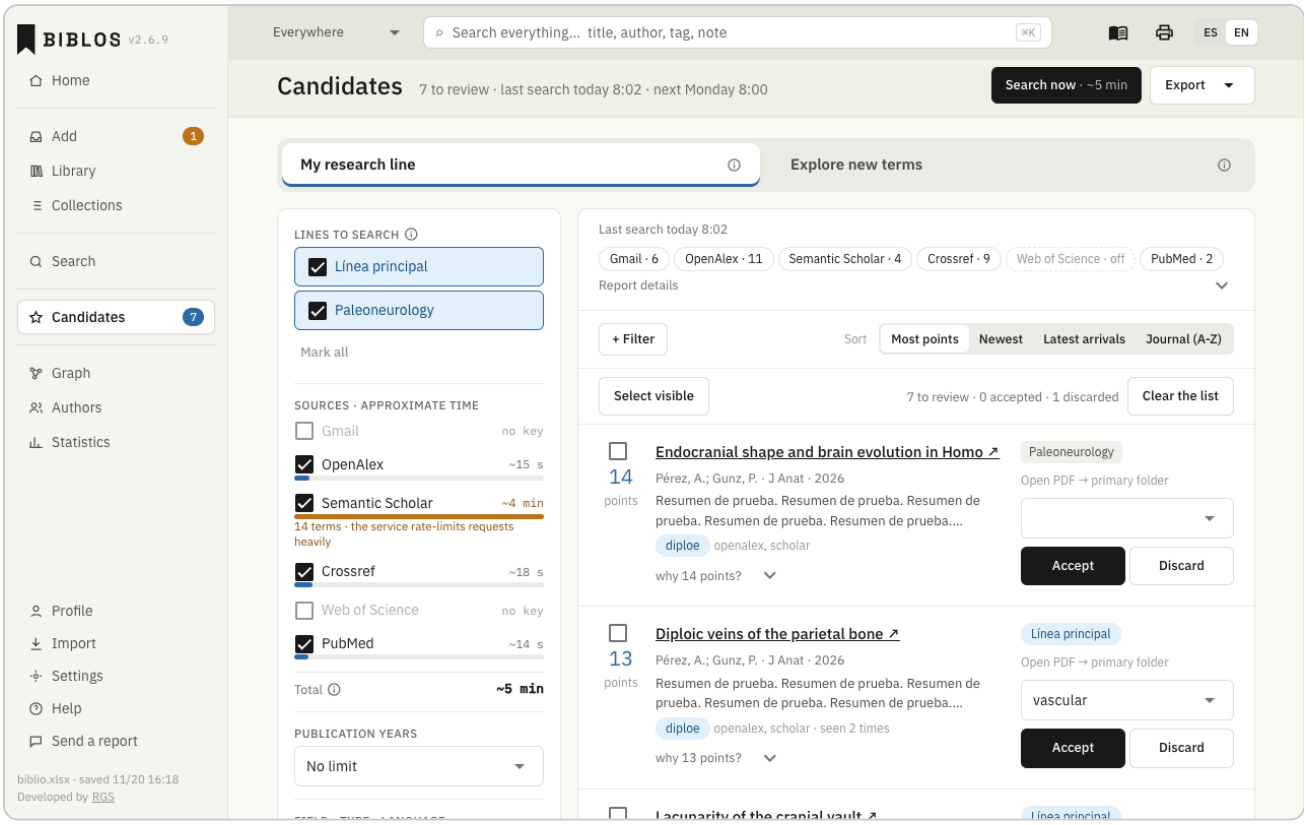
The first time you open a page, BIBLOS asks OpenAlex for the author from the DOIs of their papers (up to 10; if the cache already knows who they are, it does not look them up again), without stopping the page: what comes from the spreadsheet stays in view. The answer is saved with its date and is not asked again until you press **Refresh**. OpenAlex provides the ORCID, the affiliation, the number of publications and **Not in your library yet**: of their 50 most recent publications, those not in your spreadsheet, by DOI or by title. Their own page comes from their public ORCID; if ORCID declares none, it is asked again after 7 days and whenever you press **Refresh**. On your own page the **Personal website** from Profile wins and, with no ORCID, the Profile one is used.

If their papers have no DOI, OpenAlex does not list them in those works, or it does not respond, the page says so and shows what comes from your spreadsheet. What was saved from OpenAlex is set aside when you empty or replace the spreadsheet.

## The ORCID

**+ Add ORCID** or **Change** open the field; the format is checked and, if it is wrong, it says why. **What you write wins over OpenAlex and does not change on refreshing**, and it stays in Help's history. **Remove** leaves them without an ORCID, even if it came from OpenAlex. Beside it you see where it comes from: “written by you” or “from OpenAlex”. What you write by hand survives emptying or replacing the spreadsheet.

# 12 Candidates




— Candidates page

New candidates that the app finds by itself. The subtitle says “N to review · last search today 8:02 · next Monday 8:00” (the schedule is the one in Preferences; the next one only if the scheduled task is installed; otherwise, “no scheduled search”).

## Two views

At the top of the body there are two large tabs, each with an (i) icon on the right that explains what it does when you hover over it: **My research line**, the usual list (it searches with the terms and journals of your active lines and scores what it finds; it is everything below, except the Explore section), and **Explore new terms**, a one-off search to try out a topic or an author that does not touch the list.

My research line comes in two columns: on the **left**, a column that stays in view as you scroll, with the lines and the search settings (see “Search settings”); on the **right**, the list of candidates, with the last search on its first line. In a narrow window, the column goes above the list.

With **more than one research line** (see Profile), My research line adds two things:

- **Lines to search**, at the top of the column: each line is a whole block, box and name, that you mark and unmark by clicking anywhere on it (or with the keyboard), with **Mark all** below; the (i) icon next to the title explains what marking one does. With **more than four lines**, instead of one block per line there is a drop-down with boxes that, closed, says how many are marked (“3 of 6 lines”). It is the same box as **Active** in Profile: it applies to **Search now** and to the scheduled search; a search already running carries on with

the lines it started with. Unmarking a line **hides** its candidates without deleting them: mark it again and they come back. One always stays marked.

- On each candidate, the **label of the marked line** that gave it the most points and, next to it, an **also in: …** chip with the other lines of the profile in which that candidate also reaches the minimum (three names and “+N”; all of them, with their points, on hover).

With a single line, neither the box nor the label nor the chip shows.

**The list only shows the marked lines** in **Lines to search**. Each candidate is scored with them alone (the line, the points and the **why N points?** are those of the marked ones) and only the ones that reach the minimum with them appear. What you unmark is not deleted: it is hidden and comes back when you mark the line again. What you added by hand or from Explore always shows. The subtitle says how many are hidden (“3 hidden by the unmarked lines”) and, if all of them are, a text explains it and asks you to mark a line. The **Line** filter offers only the marked ones. Home (Candidates and Reading suggestions) and the menu counter count the same as the list.

## Search now

**Search now · ~N min** (next to the title; the figure is the approximate time with the ticked sources, and the breakdown by source shows on hover) queries, in the background, the sources you have ticked under **Sources** (see “Search settings”): Gmail alerts (label `alertas`, read-only; Scholar, Web of Science and ScienceDirect), OpenAlex (the terms and the works that cite your library), Semantic Scholar, Crossref (the chosen journals), the Web of Science API (if you have set its key) and PubMed. While it searches, below the tabs (in both) the **search board** appears: the source and term in progress (“Semantic Scholar: term 23 of 59”), the term and how much is left (“about 9 min left”), the overall progress bar and a card per source with its state (done with its time, in progress with its advance, **skipped**, **stopped** or with an error). On the right, two buttons. **Skip** leaves the source in progress as **skipped** in the report, without moving its date forward (the next search repeats it from where it was), and carries on with the others; it does not show with a single source left to do, nor with Gmail. **Stop all** cuts the search between one source and the next and also inside a request in progress: **what was already found stays** in the list, and the sources that did not finish do not move their date forward, so the next search repeats them from where they were. The report says so (**Stopped**, and “stopped” on the chip of the source that was cut). **It carries on when you change page**: the **Candidates** menu item fills in green from left to right as it advances and, instead of the counter, shows “done/total” (“23/59”, term by term; with no total, “…”); the text of the source it is on (“Searching Crossref…”) shows on hover. When it finishes, a notice appears on the page you are on and the list is up to date, with no reload. Pressing it again while it searches does not start another search; if it fails, the item turns red (the error, on hover) and ↻ relaunches the search. Home has the same button. A source that fails does not stop the others, and the report says why: if its key is not valid, “key rejected”; if the service cuts it off for quota, BIBLOS waits a few seconds and retries a couple of times before giving “quota used up” (Semantic Scholar often cuts requests off even with a key, so on the first pass BIBLOS tries only a few times per term and asks again at the end for those that did not answer: that source is the slowest, which is why it shows in amber in the settings; it also has a safety time limit, and if it goes over it, whatever is missing is left **incomplete**). If a term still gets no answer, BIBLOS asks for it again at the end and, if it is still unanswered, **keeps what the other terms brought**: the chip says “incomplete” (the missing terms, on hover) and Semantic Scholar does not move its date forward, so the next search looks at those days again. Only if nothing answers does it say “quota used

up". Each searches from its last good search, or from 30 days ago the first time (the days are a preference; so is the Gmail label). With several lines, it searches with those marked in **Lines to search**, and a new line, or one you have just marked, searches from its own date.

The **report of the last search** is saved and shown, in grey, on the first line of the list card: "Last search today 8:02" and one **chip** per source ("OpenAlex · 11"); a source that is off or failed goes in a dashed chip, with the reason on hover. **Report details**, just below, unfolds it in full (new, repeated, already in the library, below the minimum, those the filters left out).

## Reviewing candidates

The **candidates to review** come from most to fewest points, 50 at a time (**Show more** brings the next ones; change it in Settings > Preferences), with title (a link to the article), authors · journal · year, abstract, matched topics, sources and times seen. Nothing appears that is already in the spreadsheet or in Zotero (using the Zotero cache or, without Zotero, only the spreadsheet, with no warning), nor anything you discarded, nor supplementary material ("Supplemental Material for: ..."). Those that OpenAlex or Semantic Scholar mark as a **book** carry the **Book** chip. What you add from an author's page comes first, says **added by you** and is not withdrawn by the minimum points. The header box, with **On this page** chosen, filters the list by text.

**Export**, to the right of **Search now**, saves to an **.xlsx** or **.csv** file the list of the view you are on (My line or Explore), with its filter and order: title, authors, year, points, source and DOI. File name ( `biblos-candidates-YYYY-MM-DD` ), separators and formulas: as in Library. The window asks where to save it.

Filters and order are kept if you open a candidate or a Record and return with **← Back** or the back button; entering from the menu, the screen starts clean.

The **+ Filter** button, in the header of the list card (no longer in the title strip), opens the filter menu: **Title or text**, **Author**, **Journal**, **Year from** and **Year to**, **Line** (only the marked ones), **Source**, **Minimum points**, the **Type** (**Articles** or **Books**) and the **With open PDF** checkbox. Each filter you set stays as a chip you remove with its ×, on a row of its own below the **+ Filter** one (in Explore too; with no filters, no gap), each change goes back to the first page of the list, and **Clear filters**, in the menu, removes them all.

Next to **+ Filter**, in the same header, is the **order**: **Most points** (the usual one), **Newest** (by year), **Latest arrivals** and **Journal (A-Z)**. On a tie, the starting order rules. The filter text carries over to Explore, and back.

If the profile has no terms or criteria (it starts empty), a notice at the top says "Your profile has no terms or criteria: Candidates will not score anything.", with the links **Fill it in under Profile** and **Define my research line** (the assistant). Without terms, PubMed and the Web of Science API do not search: their chip says "no terms in the profile".

## Points

With several lines, each article is scored with every marked line and keeps the best; the subtractions of one line do not affect another. Within a line, each **core** topic adds 5 if it is in the title and 3 if it is in the abstract, snippet or journal; each **context** topic adds 1; **minus** topics take away 3, only once even if several match; and **title** ones take away 5, only once, and only if they are in the title. This text is fixed on the card on the right. Each candidate has a **why N points?** drop-down with one line for each thing that adds or subtracts ("core in title: topic +5"). The topics and their words are edited in **Profile > How to score** (there is a link on the card).

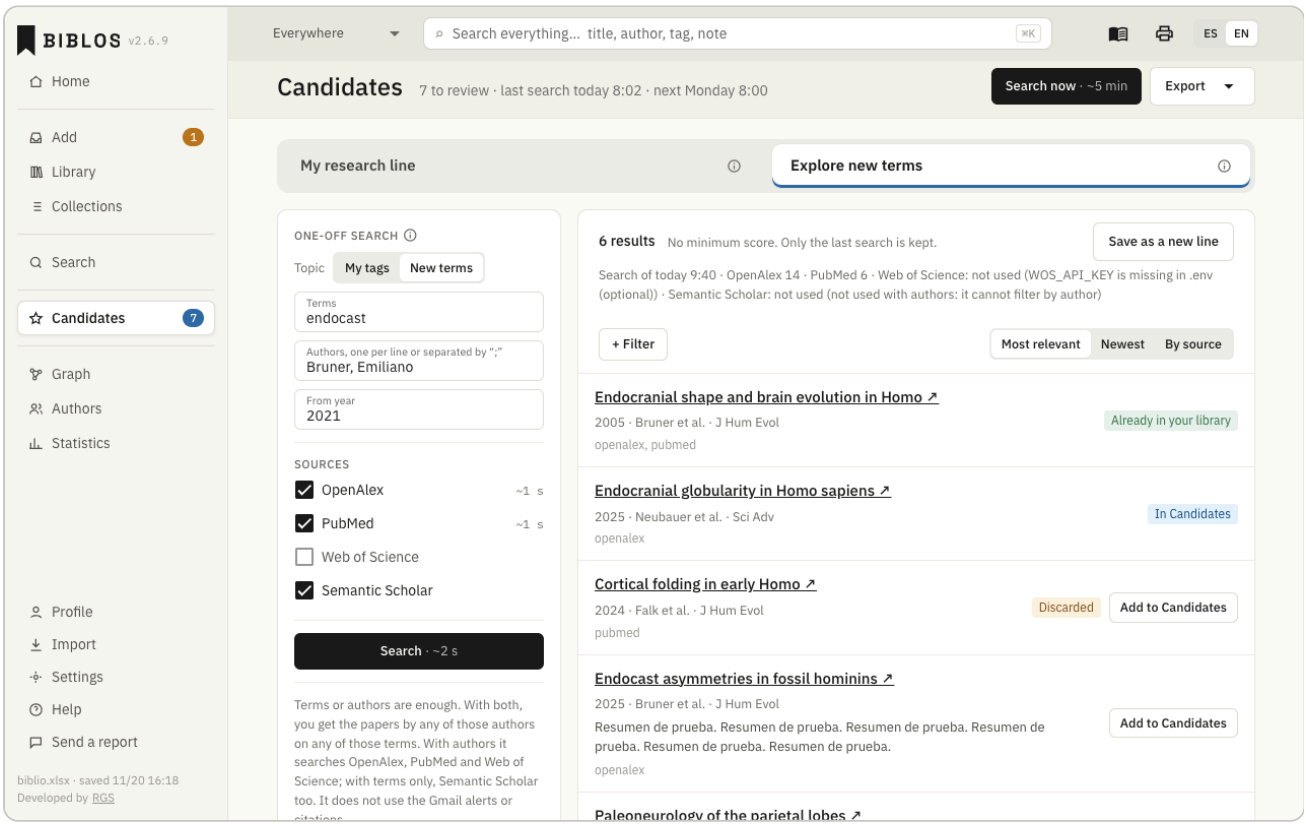
## Accepting and discarding

Each candidate has a checkbox. In the bar above the list, **Select visible** ticks the ones you can see and **Clear selection** unticks them. With any ticked, “N selected:” appears with **Accept** and **Discard**, which do what is described below to all of them at once; when done they say how many were accepted (with the PDF downloaded or only marked), how many were discarded and, if any failed, the first one and why. On the right of that bar, the tally (“7 to review · 0 accepted · 1 discarded”) and **Clear the list**, which removes **only the candidates to review** (also the ones hidden by unmarked lines: the confirmation says how many it includes), after confirming “Yes, clear”: accepted and discarded ones stay.

If the candidate has an **open PDF**, there is a folder selector (the suggested one, changeable) and **Accept** downloads the PDF to `<folder>/vigilancia_<words of the title>.pdf`, where **Add** sees it and names it. **A book** offers the folders of the secondary folder and downloads to its root, to a folder that already exists. Without an open PDF, **Accept** marks it, opens the article in the browser and leaves it in **Add** as a **From Candidates** card, without PDF (see Add). If the download fails (403, HTML, no network), it warns (“Download it from the title and upload it here”) and the candidate stays to review; its row then shows **Upload the PDF**: download it yourself from the title, pick the file and the candidate is accepted with it, just as if BIBLOS had downloaded it; and **Accept without PDF**, which accepts it anyway and leaves it in Add, where you can upload its PDF later. If the file is not a PDF, it warns and the button stays. With the batch Accept, the ones that fail are only counted and keep their button.

**Discard** (secondary button) hides it for good.

## Explore




— Explore

**Explore** is for trying out a new line or seeing what an author publishes. It is a one-off search: it **does not change the list or your profile** and asks for no minimum points. Only the last search is kept, and when you come back to Explore it is still there.

It comes in two columns, like My research line: on the **left**, a column that stays in view as you scroll, with what to search for, the sources and **Search**; on the **right**, what was found, with the search summary at the top.

- **Topic**: **My tags** (the terms of that tag in your active lines) or **New terms**, which you type.
- **Authors**: one or several, one per line or separated by ";". They are searched by name, so namesakes may show up.
- **From year**: if empty, it is the current year minus 5.
- **Sources**: with authors, Semantic Scholar is not used, and Web of Science is only there if it has its key. It does not use the Gmail alerts or citations. Each source carries its approximate time, and while it searches the same board as in My line appears, with **Skip** and **Stop all**.

What it searches depends on what you write: **terms only**, the articles that have any of them; **authors only**, those by any of those authors; **both**, those by any of the authors on any of the terms. Results come by relevance (with authors only, newest first). In the header of the results card, below the summary, the same **+ Filter** (**Title or text**, author, journal, years and source) and an **order**: **Most relevant**, **Newest** or **By source** (what has no source goes last); a new search keeps the filter and the order.

Each result carries a pill if you already know it: **Already in your library**, **In Candidates** or **Discarded**. **Add to Candidates**, on the right of each result, puts it first in the My research line list, with no points ("—") and "from Explore". **Save as a new line** creates a line with the terms searched; it starts unmarked and does not change your searches or tags until you activate it. With authors only it is off, because a line keeps terms, not authors.

## Search settings

They sit in the left-hand column, below **Lines to search**, in groups. **There is no save button**: each change is saved at once and the column says "✓ Saved" (or, if it could not be saved, the reason, and the control goes back to what is saved); when you come back to Candidates, it is as you left it.

- **Sources · approximate time**: all in view, a box per source (Gmail, OpenAlex, Semantic Scholar, Crossref, Web of Science and PubMed) with its approximate time and a proportional bar; the slow one is in amber, with the reason (for example, "many terms"), and a source that cannot be used says why ("no key", "no terms", "no journals"). Below, the **Total** with the ticked sources and a note that the default estimate is refined after the first search. While it searches, the boxes are locked ("Searching: the selection stays fixed until it finishes.").
- **Publication years**: **No limit** (the default), **Between two years** (**From** and **To**; one alone is fine) or **The last few years** ("Last 5 years").
- **Field · Type · Language**: three drop-downs with boxes; with none marked, all. **Field**: the OpenAlex fields (Medicine, Neuroscience, Arts and Humanities…). **Type**: Article, Review, Book or chapter, Preprint and the other document types. **Language**: the most common ones (English, Spanish, French…).
- **Points and PDF**: the **Minimum** points (1 by default; the (i) icon explains it) and **Only with an open PDF**. When you **raise** the minimum, whatever is waiting for review and does not reach it leaves the list when you leave the field or press Enter (a notice says how many; while you type, a higher number on the way withdraws nothing); lowering it does not bring back what was already left out.

The filters (years, field, type, language and open PDF) apply to what arrives in the next searches: what is already in the list is not withdrawn by them (for that, use **+ Filter**). In OpenAlex and Semantic Scholar, some of them (the years, the open PDF and, in OpenAlex, the type) go into the search itself; the rest, and all of them in the other sources, are checked afterwards, with what each paper brings. **What lacks the data gets in anyway**: a paper with no known language is not lost by filtering the language.

If something changed since the last search, **Search again with these settings** appears: it searches the last days in the marked sources, without asking (lowering the minimum points does not bring back what was already discarded for its score, and this search does). It does not move back each source's dates, and it hides while searching.

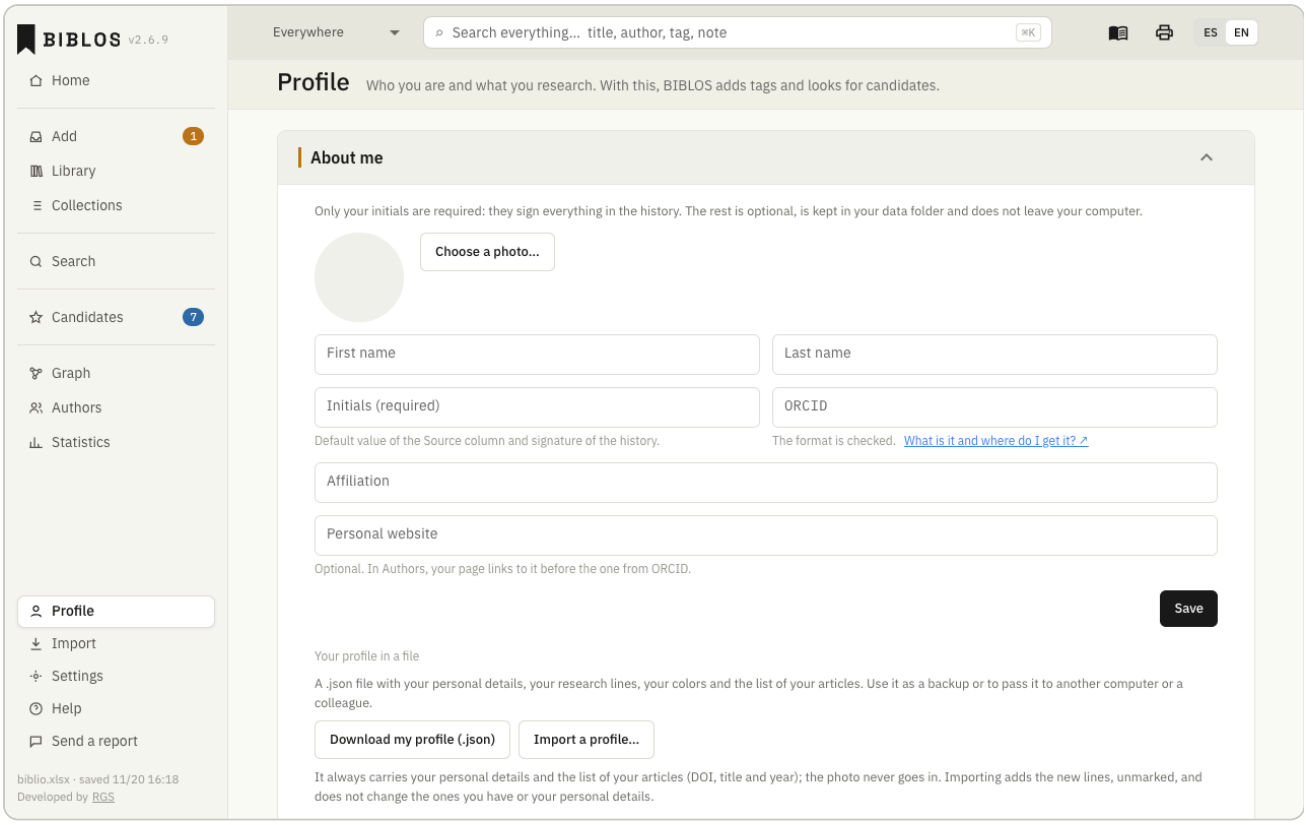
At the foot of the column, the link **Search terms in Profile →** (it opens Profile on the active line, in “What to look for”) and **How Candidates works**, folded: where candidates come from, what the Gmail label is for (without it, BIBLOS does not read those alerts; the other sources carry on) and the minimum points: if you see a lot of noise, raise them; if you miss papers, lower them. At the end, how the points are worked out. Terms and journals are edited in Profile > What to look for; the days of the first search, the Gmail label and the email, in Settings > Preferences.

**Accepted with PDF** goes below the list, with the link **Go to Add →**.

## While BIBLOS is closed

The scheduled task “Search for candidates” searches Mondays and Thursdays at 8:00 (by default) and sends an email with the 10 best, only if there are new candidates. The email goes out as HTML, with the subject “BIBLOS: N new candidates”, signed at the foot with “Sent by: BIBLOS” and its version, and “Developed by” with its author's initials below (the collection, Record and test emails use the same look), with the candidates grouped by their suggested folder (the group with the most points first and “No suggested folder” last). Each one carries its points, the title linked to its DOI, journal, year and sources, its line (only with more than one active line) and “PDF” if it has an open one. Below, “And N more in BIBLOS > Candidates.”, the sources with errors and “Open BIBLOS > Candidates to accept or discard them.”; no link points to the app. How many go in the email and whether it goes out only with new ones are preferences (by default, 10 and yes). It is installed and removed in Settings > Schedule tasks.

# 13 Profile




— Profile page

Who you are and what you research: with this, BIBLOS sets tags and looks for candidates. It is at the bottom of the sidebar, Everything is on one page, in this order: **About me** (with Download and Import), your **research lines** (the one you edit opens below the list, with three tabs: **Tags**, **What to look for** and **How to score**), **My papers** and **Colors**. **Each section is a drop-down shaped like a card**: click its header to open or close it; when open, the header sits on a very light grey band, like the title of every box in BIBLOS. The first time you come in, **About me** is open and the others are folded; afterwards each one comes as you left it (it is remembered while BIBLOS stays open; after a restart they are folded); while folded, a short line next to its title says what is inside (“Initials, name, ORCID, website, photo and profile file”), and the one the link you came by asks for opens too (for example, from Candidates, **Search terms in Profile →** opens the active line on **What to look for**). **It starts empty**: BIBLOS brings no default topic. It applies without restarting; each tab has its own save button. If the profile file is broken, the empty profile is used and the page warns you.

## About me

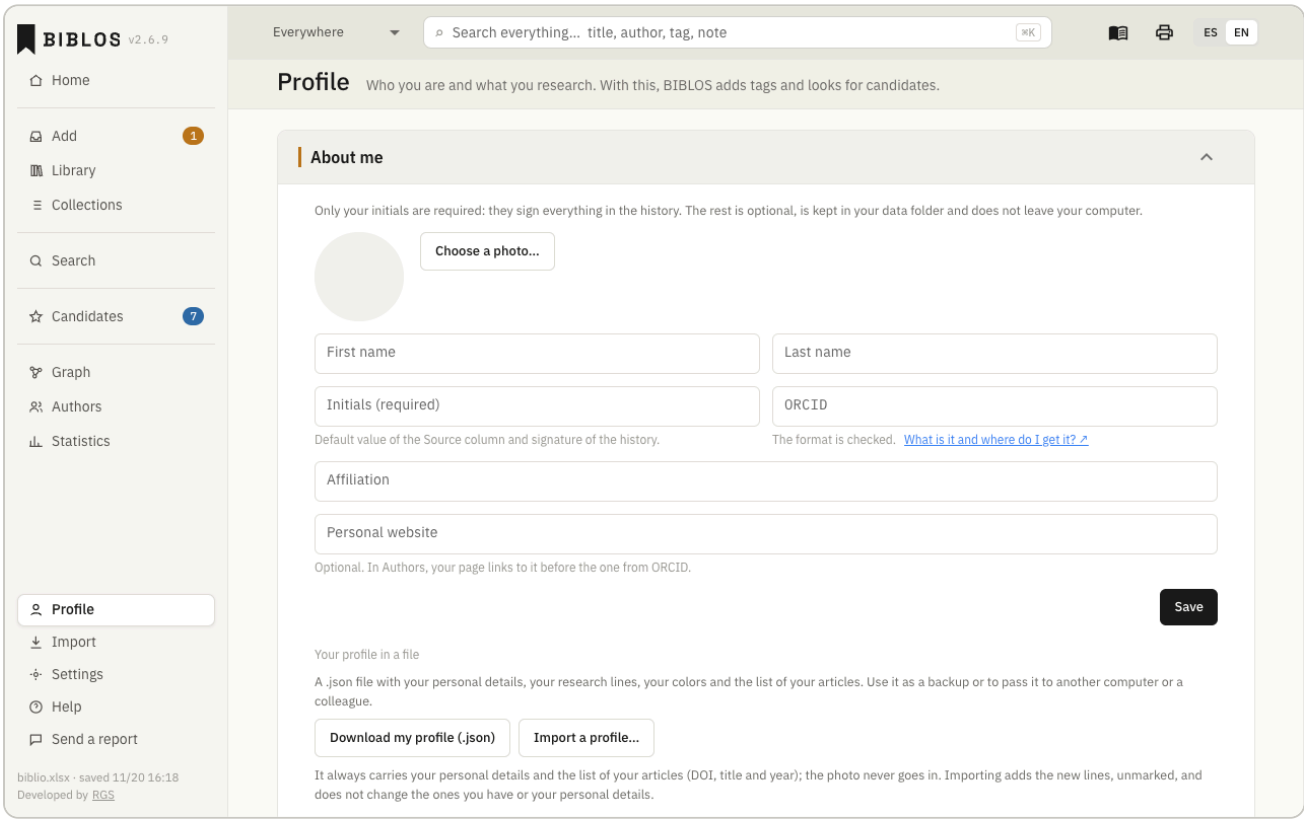
Only the **initials** are required: they are the default Source and they sign the history. If you change them and there are records with the old ones in Source, on saving BIBLOS asks what to do with them (see “Settings > Preferences”). **First name**, **Last name**, **ORCID** (the format is checked) **Affiliation** and **Personal website** are optional (the website gets `https://` if missing and is checked to look like an address; in Authors, your page links to it before the one from your ORCID), and so is the photo (**Choose a photo...**; without one, the initials show). Everything is kept in your data folder and does not leave your machine.

At the foot of the card, **Your profile in a file**: a `.json` with your personal data, your lines (tags, search and criteria), your colours and the list of your papers, as a copy or to pass on to another machine or a colleague.

- **Download my profile (.json)** gives the whole profile, with all the lines, in a `.json` file with your initials in its name. In the app's own window it opens “Save as” so you choose where, and says “Profile saved to …”; in the browser, it downloads like any file. It always carries your personal data and the list of your papers (DOI, title and year of those you sign, confirmed by ORCID or by hand); the photo never goes in.
- **Import a profile… adds** its lines as new lines, unmarked, and does not replace or change the ones you have (of the colours, only the missing ones come in). The personal data and the papers in the file are not read: they change nothing. **Add the example line**, in the lines card, adds the cranial anthropology one in the same way. If the file is not JSON or has a broken rule, it says so and changes nothing.

## Research lines

A **line** is a topic you follow, with its own tags, search and criteria. You can have one or several. Below About me, the **Research lines** card has a row per line: its checkbox, the name, a summary, **Edit** and **Remove**. **Active** is the title of the checkbox column, and next to it **Activate all** ticks every line at once (it is greyed out when they all already are); at the top, **Add the example line** (cranial anthropology) and **New line**. Candidates searches and scores with the active lines, and **one always stays active**: the box of the last one switches itself off.




— A line being edited

The line you are editing shows below with “You are editing the line” and its name, with **Rename**, **Duplicate**, **Remove** and **Close**, and the tabs **Tags**, **What to look for** and **How to score**. **Remove**, on the row or in this panel, asks you to confirm and says how many candidates would leave the list; what you added by hand

stays. The only line cannot be removed (the button switches off). **Close** hides the panel; if there are unsaved changes, it asks before discarding them, and coming back to the page does not reopen it.

With several lines, each article is scored with each one and keeps the best; the subtractions of one line do not affect another. An article's tags are joined, when tagging, with those of all the active lines. Marking or unmarking a line changes what the Candidates list shows (it hides or shows its candidates again), but it deletes no candidate: see Candidates.

## My papers

Below the lines, **My papers** shows what you have written and have in your library. If you enter your **ORCID** (or it is on your author page), the authors in the library with that ORCID come up, plus those you confirmed by hand. With no ORCID, BIBLOS proposes, by your surname and initial, who you might be: **Yes, that's me** confirms it and **No** dismisses it; **Not me** removes one you confirmed and **Propose again those I dismissed** brings them back. What is proposed does not count until you confirm it. If you have a photo in About me, it shows small to the left of your name. If it cannot find you, it asks for your ORCID or your first and last names. When you save About me, the list is checked again. A click anywhere on an article's row opens its Record.

Below, **On the web**: with your ORCID saved, **Search the web for my papers** asks OpenAlex (without stopping the page) and shows, with the date of the search, your papers that **are not in your library**, with year, journal and a DOI link. Each one carries, on the right, **Add to Candidates** (or says if it is already in Candidates). Without an ORCID, the section asks you to enter it and save. If OpenAlex does not answer, the previous search stays. In Authors, your page carries the **You** chip, and the **My papers** button on that page brings you here.

## Tags

In the tab of the line you are editing: when you add a paper, BIBLOS looks at the topics OpenAlex assigns to it: if one matches a term in the table (**If OpenAlex says…**), the paper gets that tag (**…the paper gets the tag**). Several terms can give the same tag. **New tags apply to what you add from now on; the ones already set do not change**; to take them to what you already have, **Add tags to my articles**, below. The Record suggests these same tags. To start with help, **Define with the assistant**.

The **suggestions** come from your spreadsheet, from Zotero and from the keywords and topics OpenAlex gives your library, with their count: one click and they are added. Nothing in the table is saved until **Save tags**.

**Advanced** has two more boxes, one item per line: *Rules* (`tag: expression`, searched in title and abstract) and *Parents* (`child → parent`, a single level; parents are the “generic” tags of the Graph). If a rule is not a valid expression, nothing is saved and the card says which one fails.

## What to look for

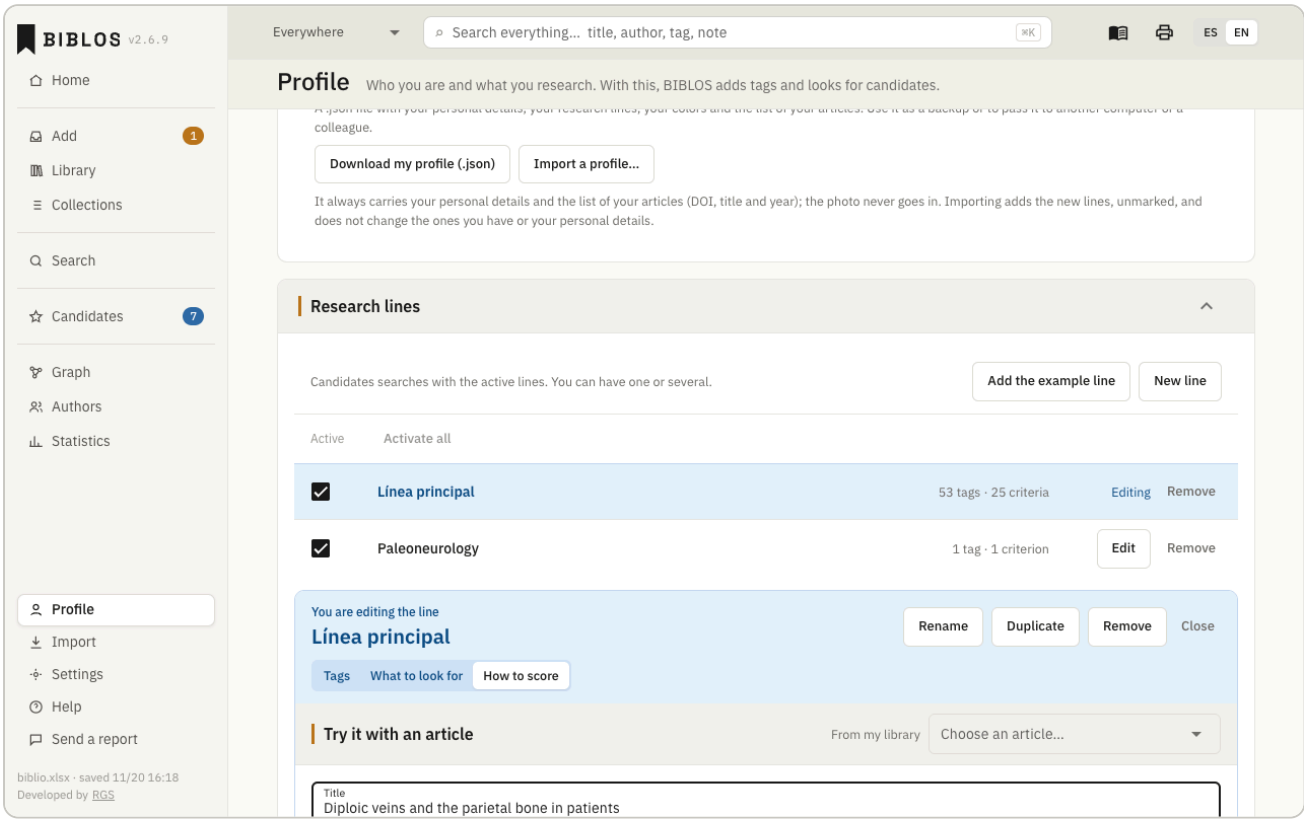
This decides what reaches Candidates from this line; **How to score** decides what stays. They are independent lists: a term here does not add points by itself.

- **Terms**, searched in OpenAlex, Semantic Scholar, Web of Science and PubMed: type one and press Enter.
- **Journals** watched in Crossref, with their ISSN and name: **+ Add a journal**. A mistyped ISSN does not go in, and it says so.

- **Suggest from my spreadsheet** looks up in OpenAlex the ISSN of the most frequent journals in the articles of your library (the first 10 that appear at least twice; books do not count) and adds them **without saving**; it says how many it added and which it did not find.

**Save the search** does not change the points of what is already waiting for review.

## How to score




— How to score

Each candidate starts at 0 (with several lines, it is counted with each line separately) and points are added or taken away. What does not reach the minimum (changed in Candidates) does not enter the list.

**Try it with an article**, at the top: type a title and an abstract, or choose one in **From my library**. A bar shows how much each topic adds or takes away, with the total and whether it gets in. It changes as you type and as you touch the words below, and saves nothing.

Below, **Your topics**, all in one list. Each topic has its words and **how much it weighs**, on four buttons:

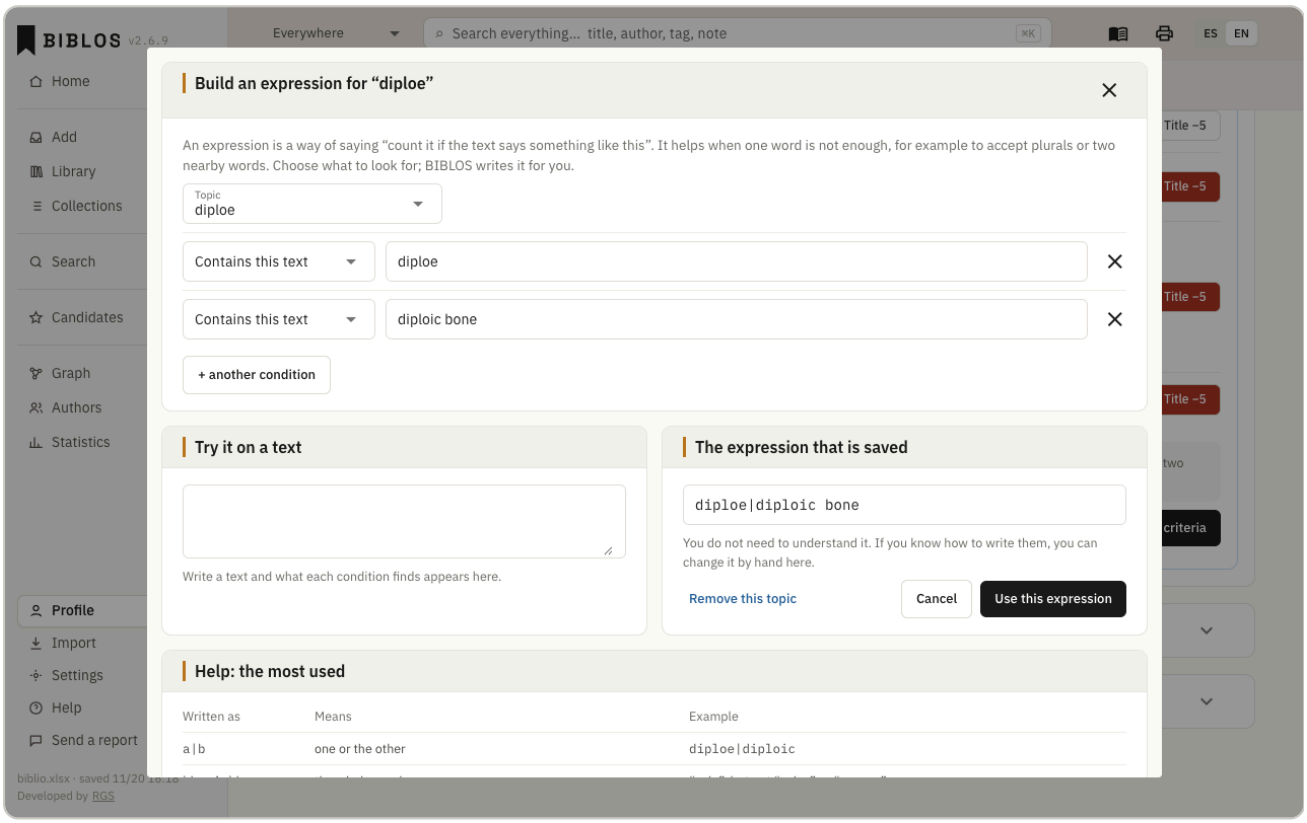
- **Core +5/+3**: the centre of your research. +5 if the word is in the title; +3 if it is only in the abstract, snippet or journal.
- **Context +1**: what goes along with it. Adds little, wherever it appears, and helps break ties.
- **Minus −3**: anywhere in the text. Takes away only once, even if several topics match.
- **Title −5**: only if it is in the title. Takes away only once. For what hardly ever interests you.

One word is enough for a topic to count, and each topic counts once. **+ word** adds another, each word's **×** removes it, another button changes its weight and **+ new topic**, at the top, creates a topic. A topic that is not a simple list of words shows **own expression** and **Edit**, and is not lost. The topics of each line are its own:

they do not mix with another's. A profile from an earlier version comes in converted, with the same points: what took points away shows as Minus and Title topics.

On **Save criteria**, what is waiting for review is re-scored and what no longer reaches the minimum drops out (it says how many). With a search running, it waits for it to finish.

## Building expressions



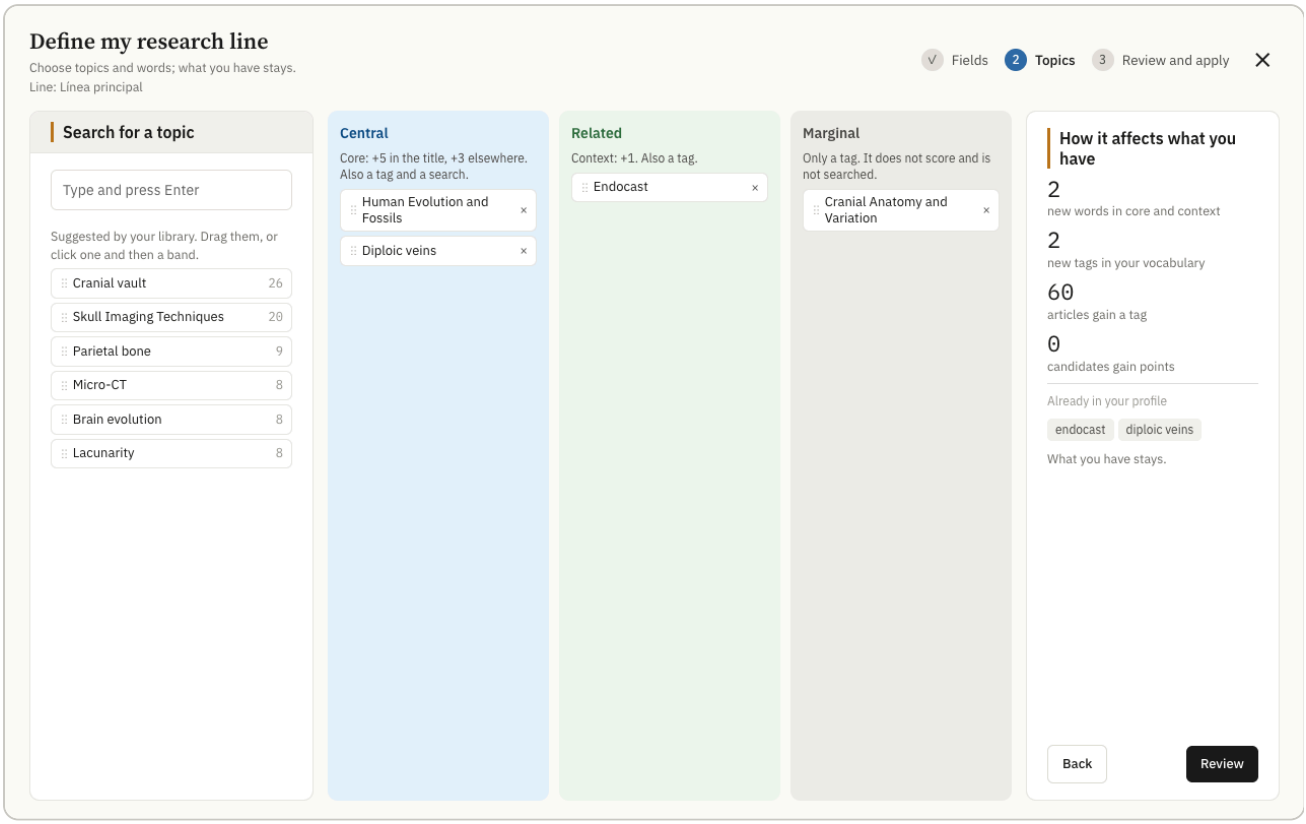

— Building an expression

An **expression** is a way of saying “count it if the text says something like this”. It helps when a single word falls short: to accept plurals (“vein” and “veins”), variants (“micro-CT”, “microCT”) or two nearby words. You do not need to know how to write them. **Advanced: build expressions**, at the foot of the list, opens this window and lets you choose the topic; **Edit**, on a topic with its own expression, opens that one.

- **The conditions**: each row is **This exact word**, **Word starting with**, **Two words nearby** (with up to N words between them) or **Contains this text**. **+ another condition** adds more, and one match is enough. Capitals and accents do not matter.
- **Try it on a text** says what each condition finds.
- **The expression that is saved** is the result. If you know how to write them, you can change it by hand; every valid expression opens as rows, and the part BIBLOS does not recognise shows in an **Own expression** row, which you edit as text. **Opening and using the expression without changing anything leaves it exactly as it was**; it is only rewritten if you change a row. An invalid expression is not used, and it says why.
- **Use this expression** leaves it on the topic and **Remove this topic** removes it. Nothing is saved until **Save criteria**.

Below, **Help: the most used** sums up how to write them by hand.

## The research line assistant




— Research line assistant

**Define with the assistant**, in Tags (also from the welcome and from the notice in Candidates), proposes topics from your library and from OpenAlex. **It only adds**, and to the line you are editing: what you already have is kept. There are three steps, with no sidebar; the **×** leaves without applying anything.

1. **Fields**: OpenAlex's fields and subfields. The ones your library has most of come ticked; with a library, you can go on without ticking anything.
2. **Topics**: on the left, the suggestions (the keywords and topics of your DOIs, with how many articles they appear in; with no library, the topics of what you ticked) and **Search for a topic** (with Enter), which searches OpenAlex and always offers your text “as my own word”. In the centre, three bands: **Central** (core, +5 in the title and +3 elsewhere; also a tag and a search), **Related** (context, +1; also a tag) and **Marginal** (a tag only; it neither scores nor is searched). Click an item and then a band, or drag it there; the **×** returns it. On the right, **How it affects what you have**: new words and tags, articles that gain a tag and candidates that go up in points, right away. With no answer from OpenAlex or no quota, it says so right there and you can carry on by hand; a free key (Settings > Connections) gives you your own quota.
3. **Review and apply**: what will be added to core, context, tags and searches, with chips you can remove, tags you can rename (if an equal one exists, it is reused) and how many queries each search adds. If one of your topics has its own expression, its new words go into a new topic, and it says so.

**Apply** first saves a copy of the profile and re-scores what is waiting for review. The last screen offers **Undo** (the profile goes back to being identical; it does not remove tags already added to your articles), **Add tags to my N articles** and **See my profile**.

## Folder tags

**Folder tags**, next to **Add tags to my articles** in Tags, gives each record (papers and books) the name of its folder as a tag, in lowercase and with hyphens, in Zotero too, and adds it to the vocabulary of the line you are editing. The window says how many records gain the tag and shows which; it **only adds** (what they already have stays) and goes into the History. With **Try the first one** you test one record before going on (that test does not touch the vocabulary). It adds no tag to what sits in the root or in folders starting with `_` or `.`.

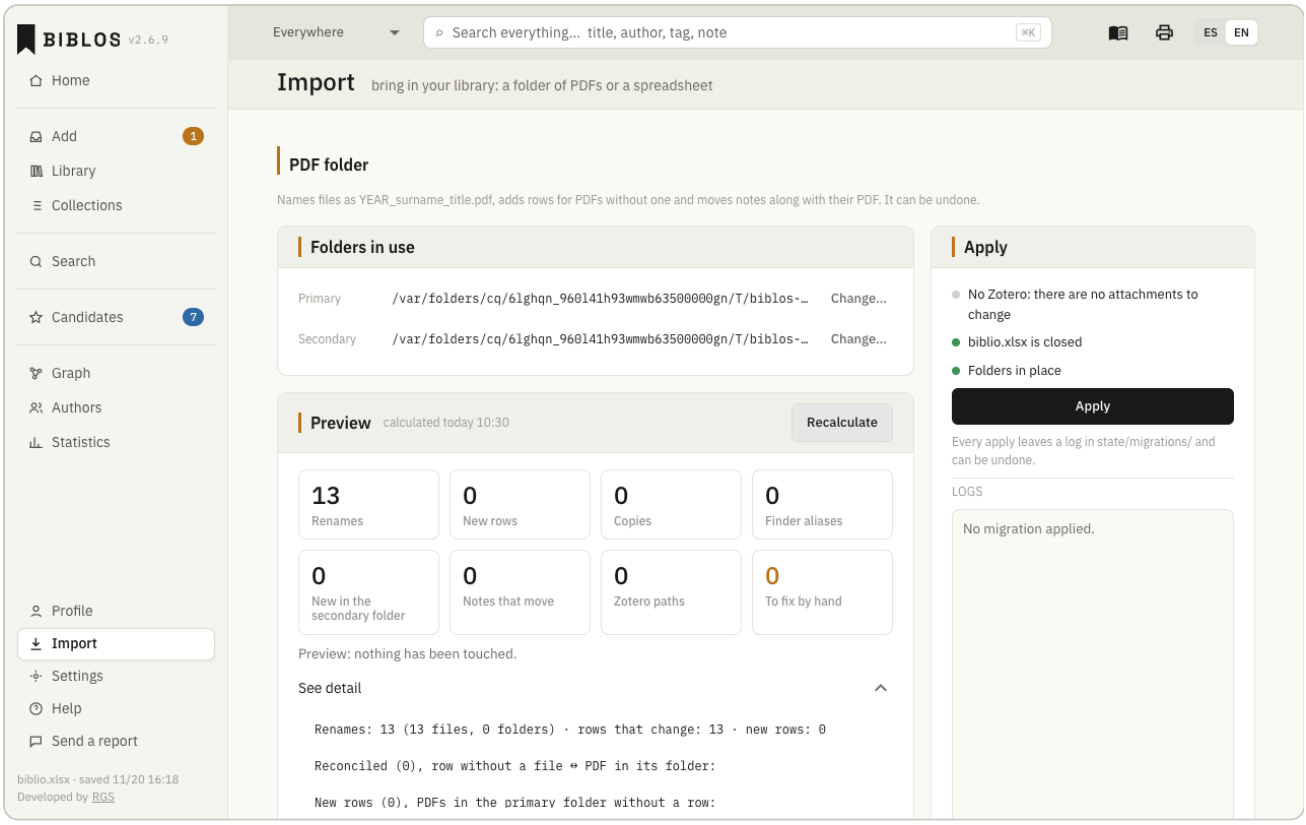
## Adding tags to my articles

**Add tags to my articles**, in Tags and at the end of the assistant, takes your vocabulary to what you already have. The window says how many articles gain a tag and shows which. **It only adds**: what each article has stays as it is, and each change goes into the History. It writes to the `Tags` column and, with Zotero, to its records too: so, with Zotero, it is worth using **Try the first one** and looking at the result there before **Add to N articles**. If Zotero does not accept a record, it says so, and it stays written in the spreadsheet. It refuses with Excel open.

## Colors

The last section of the page, valid for all lines. Used in the Graph and in Statistics: one per **topic** (each top-level folder of the papers) and, in a drop-down, one per **tag**. Each has its default colour; only what you change is saved.

# 14 Import




— Import page

Brings your library into BIBLOS, **with or without Zotero**: a folder of PDFs to put in order or a spreadsheet you already had. If you chose to define your topics with the assistant in the welcome, **Define my topics** takes you to it when you finish. The folder option is meant to be used **once**: it turns names with hyphens into `YEAR_surname_title.pdf` (files and split-book folders), updates `Filename` in the spreadsheet, moves the notes and, with Zotero, changes the paths of the linked attachments.

## PDF folder

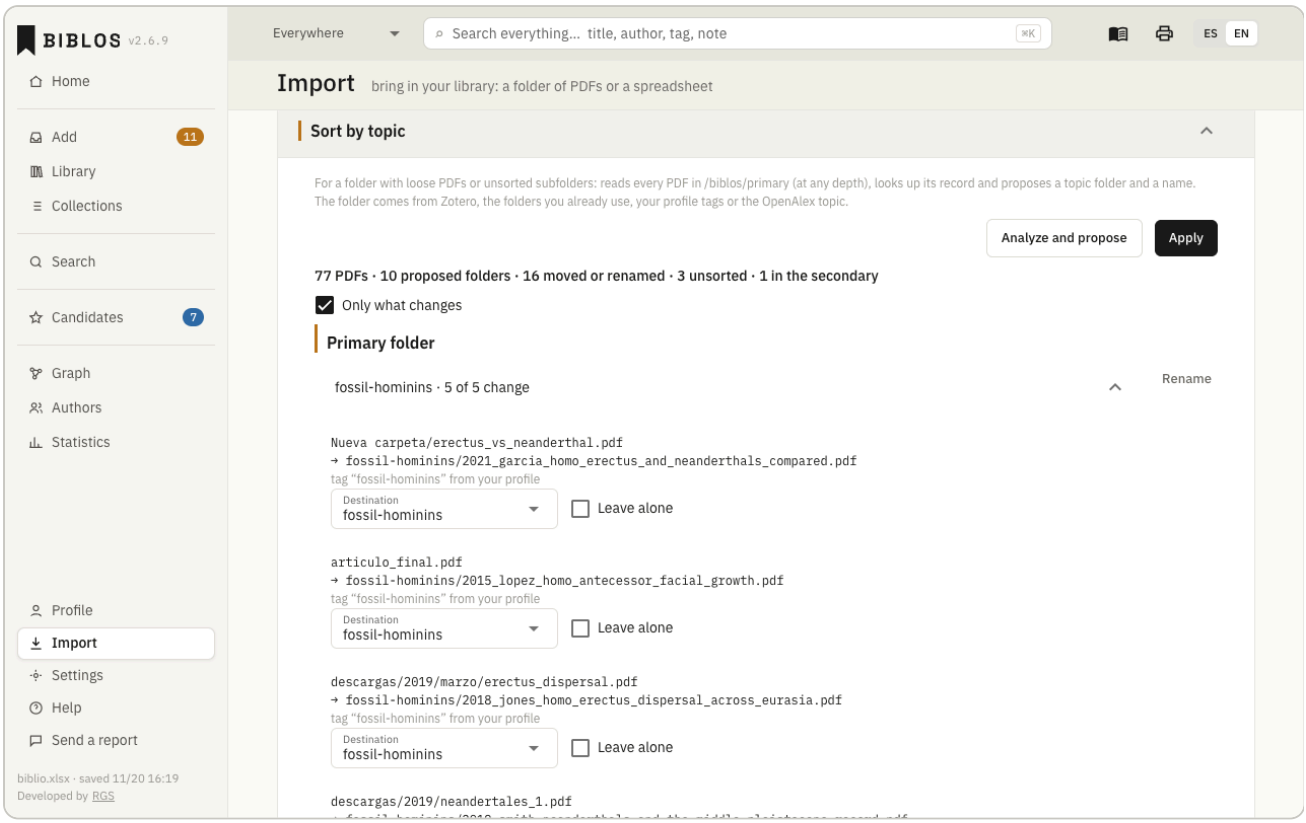
The PDF folder comes in two columns of the same height. On the **left**, **Folders in use** and **Preview**; on the **right**, the **Apply** panel, with the checks, the button and the **Logs**.

- **Folders in use** shows the **Primary** and the **Secondary** folder. **Change...** opens the system's folder dialog, saves your choice (as Settings > Paths does), puts it in use at once and recalculates the preview.
- At the top, the **warning strips**, if needed: Excel open (the window and the amber lines of “Excel open”, as in Intake: with Excel open, **Calculate preview** works, but **Apply** and the buttons that write stay off) or an unmounted folder (a disk or a cloud folder that is not there).
- **Preview**: **it is not calculated when you open the page**, but when you press **Calculate preview**. It goes through your PDF folders and compares each file with the spreadsheet (and, with Zotero, with its attachments): what would be renamed, which rows are new, which copies, aliases and notes there are, which Zotero paths would change and what would have to be fixed by hand. It touches nothing. The last one you calculated is saved: when you come back to the page it shows with its time (“calculated today 10:30”) and **Recalculate**, and the “may be out of date” pill if it is not from this session, because the

folders may have changed outside BIBLOS. With none calculated, the header says “Not calculated yet” and the card, “Calculate the preview to see what will change”. The card fills its column, down to the foot of the **Apply** panel.

- The **summary**, inside the preview, in 8 figures: Renames, New rows, Copies, Finder aliases, New in the secondary folder, Notes that move, Zotero paths and To fix by hand (in amber: rows without a file, which the import does not touch). Not calculated, they show “—”; while it reads the folders, “Reading the folders…”. The full list (renames, new rows, copies, aliases, new in the secondary folder, notes and Zotero paths, with those it cannot find, to fix by hand) is in **See detail**, open by default (with its own scrolling if it is long); if you close it, the card is only as tall as it needs to be.
- **Apply** (in the right-hand panel) is only on with a preview calculated **in this session**; otherwise it says why (“Calculate the preview to be able to apply”, or, with a saved one from an earlier session, that it has to be calculated again). It writes a log and, if something fails, what was done is rolled back. It asks for confirmation (“Yes, apply”). It refuses with Excel open, and with an unmounted folder. **Without Zotero** it applies all the same, without attachment paths. While it works, the buttons are off and you see which step it is on (“Renaming files…”, “Filling in data 12/240”, “Writing the workbook and the ledger…”). When it finishes, and after undoing or sorting, the preview is recalculated by itself.
- **Add to Zotero** (box in the Apply panel, only with Zotero): the new rows are also created as records in their collection, and PDFs are only linked. If you do not tick it, or if the paths fail, whatever is missing is added later in Settings > Zotero. Undo leaves those records in Zotero and says so.
- **Secondary folder**: every loose PDF in the secondary folder shaped `YEAR_surname_title` and every split-book folder without a row come in as a new row with the Secondary origin (the **New in the secondary folder** card). With **Use the secondary folder** off in Settings > Paths, Import only works with the primary one: it does not ask for the secondary one or warn about it.

## Sort by topic




— Sort by topic

Below the PDF folder, **Sort by topic**, **From another spreadsheet** and **Replace the spreadsheet** are drop-downs, closed by default, with a line saying what each one does ("Proposes a folder and name for loose PDFs"). With Zotero, **Sort by topic** goes next to **Old folders**, in two columns; without Zotero, it takes the full width. **From another spreadsheet** and **Replace the spreadsheet** sit side by side. Each stays open or closed as you leave it while BIBLOS stays open.

For a messy primary folder (PDFs loose or in subfolders with no order). **Analyze and propose** reads every PDF in the primary folder, at any depth, looks up its record as Intake does and proposes a topic folder and a name. Nothing is touched until you press **Apply**; **Stop** cuts the analysis short and keeps the proposal for what was read.

- **Where the folder comes from**: the Zotero collection, if there is a record; otherwise a folder you already use; otherwise a tag from your profile; otherwise the OpenAlex topic. Groups of fewer than 3 PDFs go to **varios**. Loose files in the root or two levels down or more, with no topic, go to **sin-clasificar**, at the first level. What is already in a first-level folder stays where it is. Books come apart. If a PDF that already has a row moves to the books folder, its row changes source folder but not type: a paper is still a paper, and its Zotero record stays in the papers collection.
- **The name**: `YEAR_surname_title.pdf`; whatever already has a row in the spreadsheet keeps its name. With a surname that has a particle, the surname in the name is the first word that is not a particle: "Bermúdez de Castro" gives `bermudez`.
- **The summary** says how many PDFs there are, how many folders are proposed, how many are moved or renamed and how many are unsorted. **Only what changes** (on by default) hides what does not move; open each folder to see its PDFs.

- **Edit the proposal**: **Rename** a folder (type the name of one that already exists and they merge); on each PDF, **Destination** moves it to another folder and **Leave alone** keeps it where it is; **Undo changes** drops all your edits and goes back to the proposal. Your edits survive a page reload.
- **Apply** asks for confirmation (“Apply the proposal?”) with the figures: how many PDFs change folder and name, rows that change and new rows, folders created and empty folders deleted, the PDFs that stay as they are and why, and a warning if there are more than 200 moves inside a synced folder (Dropbox or Drive will take a while to catch up). With **Yes, apply** it reviews possible duplicates (the same review as above), moves and renames, creates the new rows and deletes the source folders left empty. It is off while the analysis runs, with nothing to change and with the spreadsheet open in Excel.
- **With Zotero**: attachment paths and collections are updated (a missing collection is created), and **Add the new rows to Zotero (PDFs are only linked)** adds them (on by default). **Apply without touching Zotero (linked attachments would break)** leaves Zotero as it is. If Zotero fails, the folder stays applied and the notice says so; in Logs, **Retry in Zotero** repeats the paths and collections.
- **Undo**: Logs shows “Sort by topic · N moves, M new rows” with **Undo**, which brings back files, folders, spreadsheet and the Zotero paths and collections it moved. Collections that were created and records added stay in Zotero.

## Data for the new rows

When applying, after renaming, each new row is filled in as in Add, and the final notice counts it (“Data filled in: N (Zotero M, PDF K); no data: F”):

- **With Zotero**, if an attachment links that PDF, from its record (without going to the network): full title, DOI, journal (`Pub.`), authors, abstract and tags.
- **Otherwise**, from the PDF itself: the DOI in its text is looked up in OpenAlex or Crossref (title, journal, authors and abstract) and the tags come from your profile's vocabulary (Profile > Tags).
- **Books**: by ISBN (Google Books or Open Library), the title and, if missing, the year and the author; for a split book, from the first chapter. The `Authors` column is filled in for books too, with all their authors.

If the authors arrive in a single string (“Thomas A. Woolsey, Joseph Hanaway”), they are split into people, and the surname from the file name is the first one's (Woolsey). Whatever is not found stays as it was (year, author and title taken from the file name). This way Library, Search and the Graph have the journal, the tags and the full title.

## Possible duplicates

Before writing anything, BIBLOS looks for new rows that clash with the spreadsheet (same DOI, or same title and year) or with each other. If there are any, the review opens: at the top “N possible duplicates: review before importing” and, for each one, the **New** row next to what was **Already there**, the reason and the **Add anyway** box, unticked.

- **Continue** writes the new rows and only the repeated ones you ticked; the rest are not added and do not count as new in Add again.
- **Cancel** writes nothing and puts the file names back as they were.

### Before applying

At the top of the **Apply** panel, the checks, each with a coloured dot: Zotero (or “No Zotero: there are no attachments to change”), spreadsheet closed in Excel, folders in place and, with Zotero, the *Linked Attachment Base Directory* (the app cannot check that one: check it by hand in Zotero, in the desktop app's preferences). With Zotero there is the box **Apply without touching Zotero (linked attachments would break)**.

Before really applying, with Zotero: the keys saved in Settings > Zotero, Zotero's *Linked Attachment Base Directory* pointing to the spreadsheet's folder on all your machines, and Excel closed.

### Logs and undo

**Logs**, at the foot of the **Apply** panel, lists the applications made: the last four and, if there are more, **See all (N)**. **Undo** appears next to the last one applied (it also asks for confirmation, “Yes, undo”): it restores names, spreadsheet (the secondary folder's rows too), notes and the Zotero paths that are still untouched. If Zotero failed when applying (the notice says “Retry it from Logs”), the log carries **Retry in Zotero** (Zotero only): it takes the new paths to the attachments again and says how many it changed. It can be repeated.

### Old folders

Only with Zotero, next to **Sort by topic**. If you moved the PDFs after linking them in Zotero, here you say where they were: one piece of the old path per line (e.g. `/old/disk/`), one list for the primary folder and another for the secondary (up to 20 each). You can type them by hand or press **Add folder...**, under each box: it opens the system's folder picker and adds the chosen one as one more line (if it is already there, it is not repeated). When applying, the attachments that point there are repaired. **Save** keeps them in the preferences; without it, what you added is not kept.

### From another spreadsheet

Drop-down, with two modes: **Add new rows** and **Complete rows you already have**.

## Add new rows

Brings the rows of another spreadsheet into your library, with no destination sheet to choose.

- **Choose xlsx or csv** uploads the file (the Zotero CSV export works too). If the xlsx has several tabs, you pick one; each row carries its type and, from it, its source folder (a book with no folder of its own goes to the secondary).
- Each column of the file shows the BIBLOS column it goes to, proposed by name (ignoring accents and capitals, with synonyms); you can change it or leave it out with “(don't import)”.
- **See preview** calculates without writing: how many rows are added, which repeat (same DOI or same title and year, against the spreadsheet and within the file) and which are empty. With repeated rows it warns “N possible duplicates: reviewed when importing”. Changing anything clears the preview.
- **Import**: if there are possible duplicates, it first opens the same review as the PDF folder (only the repeated rows you tick with **Add anyway** come in; **Cancel** writes nothing); then it asks you to confirm with “Yes, import” and adds the rows in a single write (or creates the spreadsheet if it does not exist). **Add to Zotero** also adds the new rows to Zotero.

# Complete rows you already have

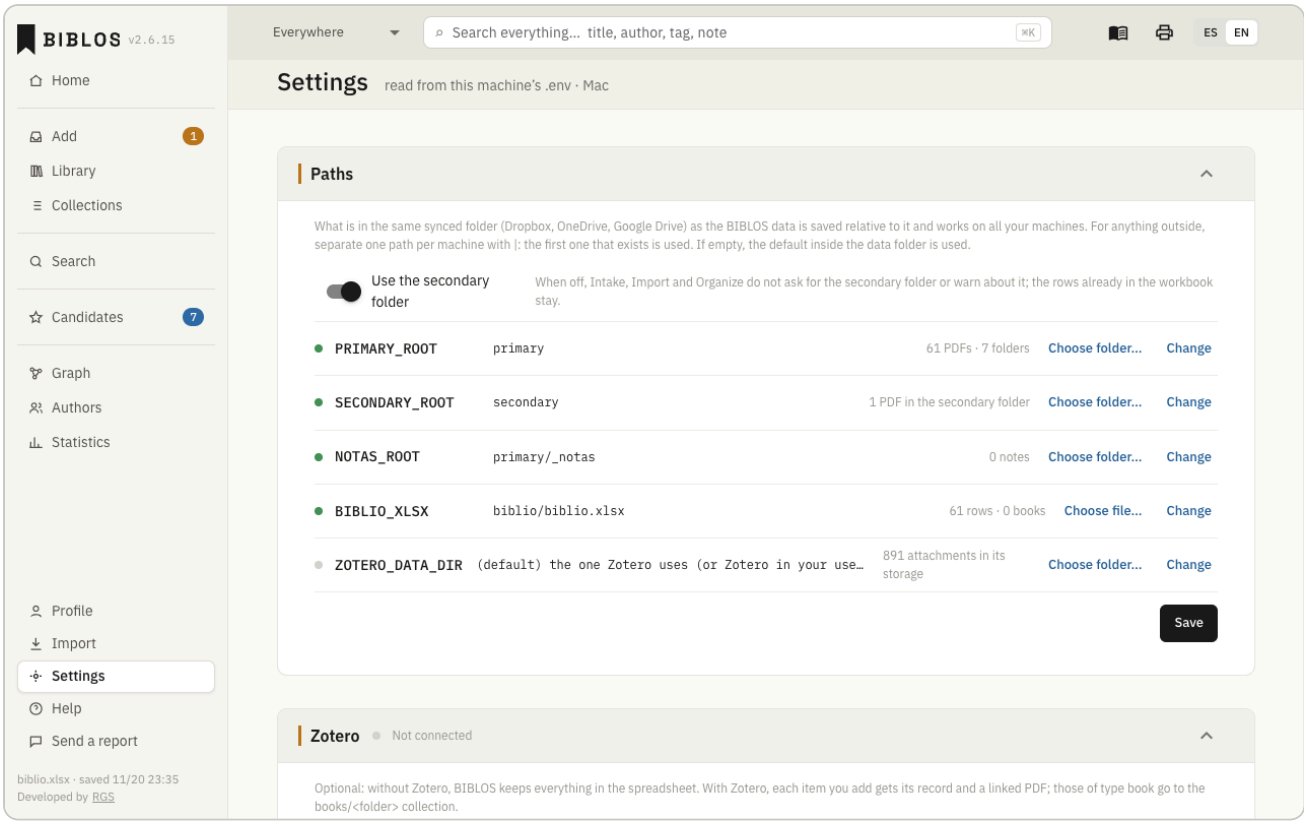
To bring a column from another spreadsheet (the typical case, **Source**) into rows you already have, without adding any. Each row of the file is matched with **a single** row of yours, in this order: DOI; title and year (one year of margin); file name, without the folder; and surname, year and similar title. If a key gives several rows, the next one is tried; if none gives a single row, the row is ambiguous and is not touched (and neither are two rows of the file on the same one).

- **Columns to write**: only those you mapped, never Folder or Filename; Source comes by default, if it is mapped.
- **Overwrite what is already there**: of the chosen columns, those where what is written gets changed; the rest only fill the empty ones (Source, by default). It never erases: an empty cell in the file writes nothing.
- **See preview** counts, per column, what is filled in, what is overwritten and what does not change, plus the ambiguous rows, those that do not match and the empty ones.
- **Complete N rows** asks you to confirm with “Yes, complete” and writes in one go; each change goes into the History. **Add to Zotero** also adds the new rows to Zotero.

## Replace the spreadsheet

Puts another `biblio.xlsx` in place of the current one. It is for when the right spreadsheet is a different one; to add rows to the one you have, use From another spreadsheet > Add new rows. **Choose the new .xlsx** compares what there is today with what the file brings (it must have the bibliography sheet, with the `Title` column; columns BIBLOS does not use are kept). **Replace…** asks you to confirm: the current spreadsheet stays in `_copias_biblio` and what derives from it (index, records) goes to a separate backup folder, as when emptying. It refuses with the spreadsheet open in Excel; if anything fails, the previous one stays as it was.

# 15 Settings




— Settings page

Edits the `.env` file in BIBLOS's data folder (the first **Save** creates the folder and the `.env` if they did not exist), and shows what runs while the app is closed. In this order: Paths, Zotero, Notification email, Connections, Preferences, Fill in missing data, Recover title formatting, Schedule tasks, Configuration, Empty the library and Blocked. **Every section is collapsible**: the first time you enter, all are open, so you can see what there is; afterwards, each one comes as you left it while BIBLOS stays open (after a restart, collapsed). With a section collapsed, a short line next to its title says what is inside (“PDF, spreadsheet and data folders”). A link from another screen opens only the section it asks for (for example, the notice about a missing spreadsheet opens Paths), also the first time. Your research and your details are in **Profile**. If a key is also set in the system environment, the environment's wins: the page warns you.

## Paths

**Primary folder**, **Secondary folder**, notes and spreadsheet: each with a dot (green if it exists on this machine), what is saved for it and **what it contains**: “N PDFs · N folders”, “N rows” for the spreadsheet, “N notes”, “N PDFs in the secondary folder” (it counts PDFs: a split book adds its chapters), “not mounted” or “not responding” (if it takes more than 20 s, for example with a cloud folder).

The **Use the secondary folder** switch (on by default, unless you chose none in the welcome: then it shows off) turns it off if you do not need it: then Add, Import and Organize do not ask for it or warn that it is missing, and the card says “Secondary folder off”. The secondary rows already in the spreadsheet stay. It saves as soon as you change it; turned on again, the earlier path (or the default one) comes back.

Both folders take PDFs the same way: the record type comes from Zotero, OpenAlex or Crossref (an ISBN without a DOI, a book) and, with no data, the PDF comes in as a **journal article**; if it is not one, change it on its Add card or in the Record. There is no longer a type of its own for the secondary folder. If your previous version had one, the first time you open this BIBLOS it writes that type into the spreadsheet for the secondary folder's records that had none (first saving a copy of the spreadsheet and leaving it in the History), so they do not change; if Excel has it open, it says so and does it once it is closed.

With Zotero there is also Zotero's data folder (optional), where it keeps the PDFs it uploaded ( `storage` ). When empty, BIBLOS finds it by itself in Zotero's preferences or in the Zotero folder of your user, and the card counts “N attachments in its storage”. Add uses it to copy a PDF uploaded to Zotero into your folder.

**Change** unfolds the field, with the folder it leads to on this machine and whether it exists; **Save** writes it. **Choose folder...** opens the system's folder dialog, which waits until you close it, and fills the field with your choice (it unfolds the field if it was closed): then you have to press **Save**. For the spreadsheet, which is a file, it is **Choose file...**, for `.xlsx` only: it fills the field like the folder does, and on **Save** the spreadsheet is in use without restarting. A spreadsheet without the bibliography sheet is not accepted (you are told why and the field does not change). If you close the dialog without choosing, nothing changes.

When saving, whatever falls in the same synced folder (OneDrive, Google Drive or another) as the data folder is written **relative to it**, so it works on all your machines. For anything outside, enter one path per machine separated by `|` : the first one that exists is used. A path that does not exist is saved anyway, with a warning. When empty, BIBLOS uses the default one: a primary folder and a secondary folder inside the data folder, notes inside the primary folder and the spreadsheet, `biblio.xlsx` **inside the primary folder** (if you already had one from 2.0.0 in the data folder, that one is kept), and the card shows it as “(default)

## Zotero

Zotero is optional. “Using Zotero” means having the Zotero user ID and API key; there is no other preference. The card says **Connected** or **Not connected** (it only checks whether keys exist) and shows the user and the key. **Test connection** calls Zotero with what is typed, even if not saved (“Connection OK” or “Could not connect: ...”). **Save** writes only those two keys to the `.env` and applies at once.

Below, the state of the **Zotero cache** (“Cache: N records · updated ...” or “No cache”) and **Update cache**, off without Zotero. The cache (authors, abstract, journal and tags of each record, for Search, the Record and the Graph) keeps **itself up to date**, in the background and bringing only what changed: when the app opens, when you open Add or Search, and every 10 minutes (if it fails, the previous one stays). What you send to Zotero's trash leaves it too. Without that cache, Search, the Record, the Graph and co-authorship only have what is in the spreadsheet (authors from `Authors` or `First author` , journal from `Pub.` ).

**Tools** (off without Zotero), with the result as text below:

- **Diagnostics**: the linked attachments (and how many are files uploaded to Zotero, which are left alone) and the folders with no collection in Zotero; read only.
- **Add what is missing**: the rows that have no Zotero record yet. It first brings the cache up to date (without it nothing is created) and shows a **preview**: new records, rows that take the key of a record that already exists and records left with a single link. **Add**, after confirming “Yes, add”, does it in batches. PDFs are not uploaded: they are only linked.
- **Tags from Zotero**: a preview of how the `Tags` column of papers and books would look according to the Zotero records (or “Nothing to write.”).

- **Write tags**: writes that preview to the spreadsheet, after confirming “Yes, write”; off when there are no changes.
- **See types** and **Set types**: **See types** counts the rows with no Record type; **Set types** gives them that of their Zotero record or, without one, the default (journal article, in both folders; after confirming “Yes, set types”; it also works without Zotero; off). It only touches rows with no type.
- **Check types**: compares the type of each row with a Zotero record against that of its record and that of OpenAlex (by its DOI), offline: it uses what is saved on disk. It opens a window with a summary and two lists. In **They agree**, Zotero and OpenAlex say the same and it is not the row's type: **Apply** sets it on all of them (after confirming). In **Doubtful**, the sources disagree or there is only one, and one of them proposes a type other than the row's: choose on each one (“Leave as it is” by default) and press **Apply the chosen ones**. With the **also in Zotero** box (off by default), the records whose chosen type differs from Zotero's change there too: they keep the fields that are valid in the new type, the journal goes to the right field (in a book, to `extra`), the DOI goes to `extra` if the type has none and, if it goes from book to another type or the other way round, the record changes collection (the books one or that of its folder). The summary also says how many rows still have no OpenAlex data (it is fetched when the app opens). Off without Zotero, you can look but not apply.

**One link per record.** Each record carries a single link to the PDF, with the BIBLOS path: when adding or processing, the spare links go to Zotero's trash (you can recover them there). Books go to a books collection, with a subcollection per folder and a book-type record. **Parent collection**: if your Zotero already has a top-level collection named “papers”, “artículos” or “articles” (ignoring case and accents), new folder collections for papers are created inside it; for books, “books” or “libros” work (if there is none, “books” is created). A collection that already exists with the folder's name, at the top level or inside the parent, is used as it is.

Without Zotero its warnings are silent (Library, Candidates, Add, sidebar footer, empty `Zotero key` in the Record); with Zotero configured and failing, they continue.

## Notification email

How BIBLOS's emails go out (the Candidates notices and those of collections and Records). All carry a “BIBLOS: …” subject, the same look and, at the foot, the signature “Sent by: BIBLOS” with its version and, below, “Developed by” with its author's initials. With the **SMTP server** empty they go out through the Gmail account in Connections (with its user and app password). With another provider, enter its server, the **port** (465 is encrypted from the start; 587, the default, or another, uses STARTTLS), the **user** (the sending address) and the **password**, which does not have to be your account's: if your provider requires or allows it, use an **app password** (Gmail, iCloud and Yahoo require one with 2-step verification; others, like Outlook or your university email, have their own rules). **Recipient** is the address that receives them; empty, the sending account. At the top, the state with what is saved (“Via smtp.gmail.com:465 (SSL), Gmail account, to …” or what is missing). **Send a test email** sends one (“BIBLOS: test email”) with what is typed, even if not saved, and says whether it went out or the error; **Save** saves only this card's fields.

## Connections

OpenAlex, Gmail (alerts), Semantic Scholar and Web of Science, each with its state, “Connected” or “Off”. The state only checks whether the variables have a value: no service is called. OpenAlex and Semantic Scholar always show “Connected”, because their key is optional (without it, the detail says “no key: shared

quota”). **Change** unfolds the fields (OpenAlex key, Gmail account and app password —it is not your Gmail password: it is the 16 letters Google gives you for BIBLOS—, Semantic Scholar and Web of Science keys); secret keys are hidden, with an eye to show them, and apply as soon as they are saved.

## Preferences

What used to be fixed, in three columns; it applies without restarting, except the port. Each block has its own **Save** (if something is not valid, it says so and saves nothing):

- **Add**: *initials* (the default Source; up to 10 characters, empty by default; if you change them and there are records with the old ones in Source, **Save** asks: **Move them to …** (the records move to the new initials, in a single change that is recorded in the History), **Keep them with …** (the new ones are saved and those records stay as they were) or **Cancel** (nothing is saved). The same when you change them in Profile > About me) and the name limits: title words (8), title characters (55) and name characters (75; at least 10 more than the title's). These limits only shorten the file name: the title is kept whole and the Record always shows it complete.
- **Candidates**: days of the first search (30), Gmail label ( `alertas` ), candidates in the email (10) and “Email only when there are new ones”. The sources and the minimum points are still edited in Candidates.
- **Home**: the **reading suggestions** of the Reading suggestions card: **By my research lines** (the default: they come from all the lines of the profile, ticked or not) or **At random** (they change every day).
- **Library**: title characters in the table (0, the default, means no cut; up to 500). With a number, the title is cut there with “…” and the full one shows on hover.
- **Rows per screen**: how many rows are drawn at once in Add (25), Candidates (50), History (50) and Search (200), from 10 to 500. **Show more** brings the next ones.
- **App**: the port (8765, from 1024 to 65535); the new one is used when BIBLOS restarts.
- **Startup**: **Check for a new version at startup** (on by default) and **Check now**, which asks right away (see “New versions” in Getting started).
- The **language**: “System default” (your computer's: Spanish if it is Spanish, English otherwise), “Español” or “English”. Changing it reloads the page; the scheduled emails (the Candidates ones) go out in the chosen language. The built-in texts of the page's controls change when BIBLOS restarts. Spreadsheet column and sheet names, your folders, tags and notes are not translated.
- The **mode**: “Its own window” (default) or “Browser”. It applies the next time you open BIBLOS. In the window, external links (DOI, articles, Zotero) open with the system browser or app, and exporting the profile asks where to save it.

A broken preferences file does not stop BIBLOS from starting: the default values are used and the card warns you.

## Fill in missing data

Fills in the empty `Abstract` , `Authors` and `Pub.` (journal) of the spreadsheet's articles (books are skipped). **See what is missing** calculates the plan (it goes to the network for the DOIs) and reports it as text; **Fill in** writes it (off until there is a preview with changes). Each empty cell is looked up first in the Zotero cache and, if something is missing and the row has a DOI, in OpenAlex and, for whatever is still missing, in Crossref. It never overwrites what is already written, nor rows whose title changed in the meantime.

## Recover title formatting

On import, some titles lost their formatting: the italics of a species, a subscript, small caps. This card gives it back to the old rows, from the OpenAlex cache or, failing that, Zotero's, **without going online**. **See what changes** calculates the plan and counts what would change; **Apply** writes it (off until there is a preview with changes) and says “Recovered N titles”. It only changes titles that are still as imported; what you edited by hand is left alone. New titles already arrive with their formatting.

## Citation styles

Besides the general formats (APA 7, MLA, Chicago author-date, Harvard, Vancouver and IEEE), you can add a journal's citation style. **Find a journal's style…** opens the **Add citation style** window: type the journal and press **Search**. BIBLOS looks it up in the official CSL style repository (only at that moment; it needs a connection) and shows the styles that resemble it, marked **this journal** or **similar**; **See example** builds a test reference and **Add** saves it. Nothing is added until you choose it.

Many journals have no style of their own: they use their publisher's or a general one. The window then says so (“There is no specific style for…”) and lets you pick a similar one, use a general one or **Upload a .csl…** (the style file, if the journal provides it in its author guidelines). The same button is on the card. A file that is not a valid CSL style, or that cannot produce a reference, is not saved and the reason is shown.

The card lists the added styles with their journal, where they came from (the repository or uploaded), the format they are based on and their ISSN; the bin removes them (it asks first). If you remove the style you had chosen, citations go back to APA. Added styles are kept when you empty the library or update BIBLOS.

## Schedule tasks

The scheduled task “Search for candidates” (on Mac and Windows), which runs on time even when BIBLOS is closed, with when it runs (“Monday and Thursday · 8:00”, by default) and the buttons **Install** (or **Reinstall**, if already installed) and **Remove** (after confirming “Yes, remove”; it stops running while the app is closed). Install uses the schedule from the preferences. The AI notice task of earlier versions (“AI notice”) no longer exists: BIBLOS removes it by itself when it opens. If another version of BIBLOS installed it, it says “Installed by another version of BIBLOS…: press Reinstall”; the old one keeps working until then. On Linux it says “Mac and Windows only”.

If an installed task uses **another data folder** (for example, it was installed by another copy of BIBLOS or by an earlier version), Settings says so: what that task does, such as the candidates it finds, stays there and not in this app's folder. **Reinstall here** installs it again pointing to this folder. In “Search for candidates”, **Bring the candidates from the other folder** merges the list there with the one here, without duplicates: what is there comes in with its state (a discarded one does not come back as pending), and if something here is to review and there it was already decided, the decision wins. The other list is not touched, a copy of this one is saved before merging, and it cannot be brought while a search is running. While the page stays open, **Undo** leaves the list as it was.

Below, **Schedules**, in two columns with their label on top: the days of the candidates search (at least one) and its time, with **Save** on the right. Saving **does not touch the installed task**: if it differs, the task says “Installed for …; reinstall it to use …” and you have to press **Reinstall**.

## Configuration

To take your configuration to another computer or another BIBLOS installation. **Export configuration** saves to a file your paths and keys, your preferences and your whole Profile (all the lines); the window asks where to save it. The **Include keys and passwords** checkbox is off by default: when off, the file carries neither the Zotero key, nor the email passwords, nor the other service keys, and when you import it the ones already there are kept. Turn it on only if you will keep the file somewhere safe.

**Import configuration...** asks for a file and, before writing anything, shows a preview: the values that change (from what you have now to what the file says; keys are masked), the warnings (paths that do not exist on this computer or belong to another one, a key hidden by the system environment) and what cannot be read (if the file is from another BIBLOS version, what can be read is read). Whatever the file does not carry stays as it is. When you confirm with **Import**, BIBLOS first saves a copy of what you had and tells you where. If the paths change, it uses them at once; if the language changes, the page reloads. A file that is not from BIBLOS or is broken is rejected and nothing is touched.

## Empty the library

To start from scratch, for example to import the PDFs or a spreadsheet you already had again. **Empty...** asks you to type **EMPTY** and then:

- the current spreadsheet is kept in `_copias_biblio` as `antes-de-vaciar-biblio-<date>.xlsx` and an empty one is created;
- what derives from it (Search's index, Add's records, Import's logs) moves to a separate backup folder: **nothing is deleted**.

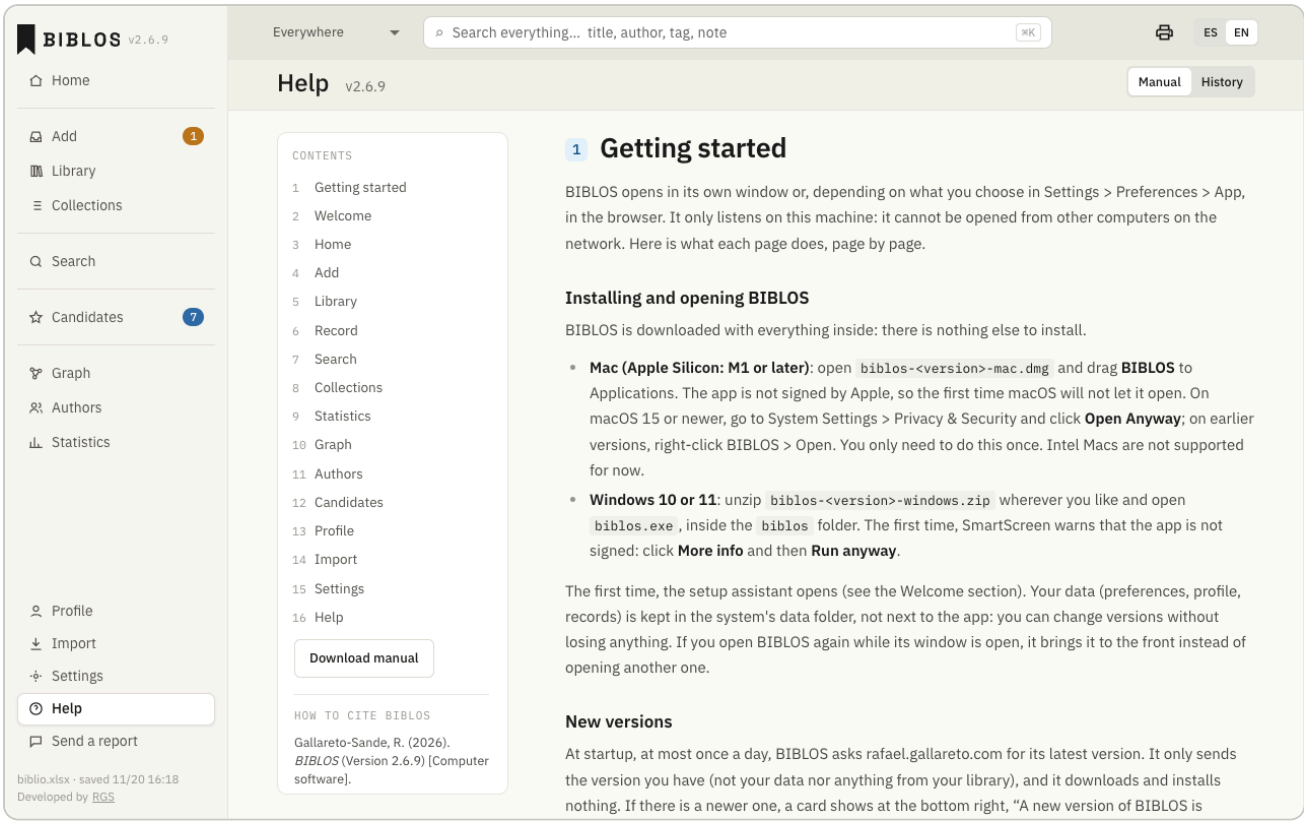
It **does not touch** the PDFs, notes, Zotero, the `.env`, the profile, the preferences or Candidates. It refuses with the spreadsheet open in Excel. When done it says where the copy is and offers **Go to Import**.

## Blocked

At the end of Settings, the list of what you blocked in Add and no longer shows up there, not even under Ignored. The PDFs stay in their folder. Above the list, a **Filter by title or folder...** box and the count (“N blocked”). Each row says **What** it is (PDF, split book, Zotero with no PDF or Candidates with no PDF), its **Title**, its **Folder** and **Since** when. **Unblock** returns the item to the Add list. With nothing blocked, the section says so.

Separately, **Set aside in _ignored (earlier versions)** shows the PDFs that earlier versions of BIBLOS set aside with Remove in the `_ignored` folder. Each one has **Put back**, which returns it to its folder and to Add. What was set aside has no date: **Since** shows “—”.

# 16 Help




— Help page

Two tabs: **Manual** and **History**. The **BIBLOS manual** is inside the app and available offline; the title carries the version. On the left, **Contents** is the index, numbered and with one entry per page: it stays in view as you scroll and highlights the chosen section. The header box, with **On this page** chosen, filters the manual as you type and shows the sections that match. On each page of the app, the book icon (**See in the manual**), next to Print, opens that page's section, and **← Back** returns you. Search (⌘K) also shows manual sections.

## Enlargeable screenshots

A click on any screenshot in the manual enlarges it to full screen. It closes with the **×**, with Esc or with a click on the background.

## Download the manual

The **Download manual** button, under the contents, asks where to save the manual as a **PDF** (cover, contents and every section with its screenshots, in the app's language), copies it there and opens it with your PDF application. It has the same layout as this page. If you close the dialog without choosing, it does nothing.

At the end, **Credits** carries the version, the author and the rights, and the **Check now** button, which asks whether there is a new version of BIBLOS (see “New versions” in Getting started).

## How to cite BIBLOS

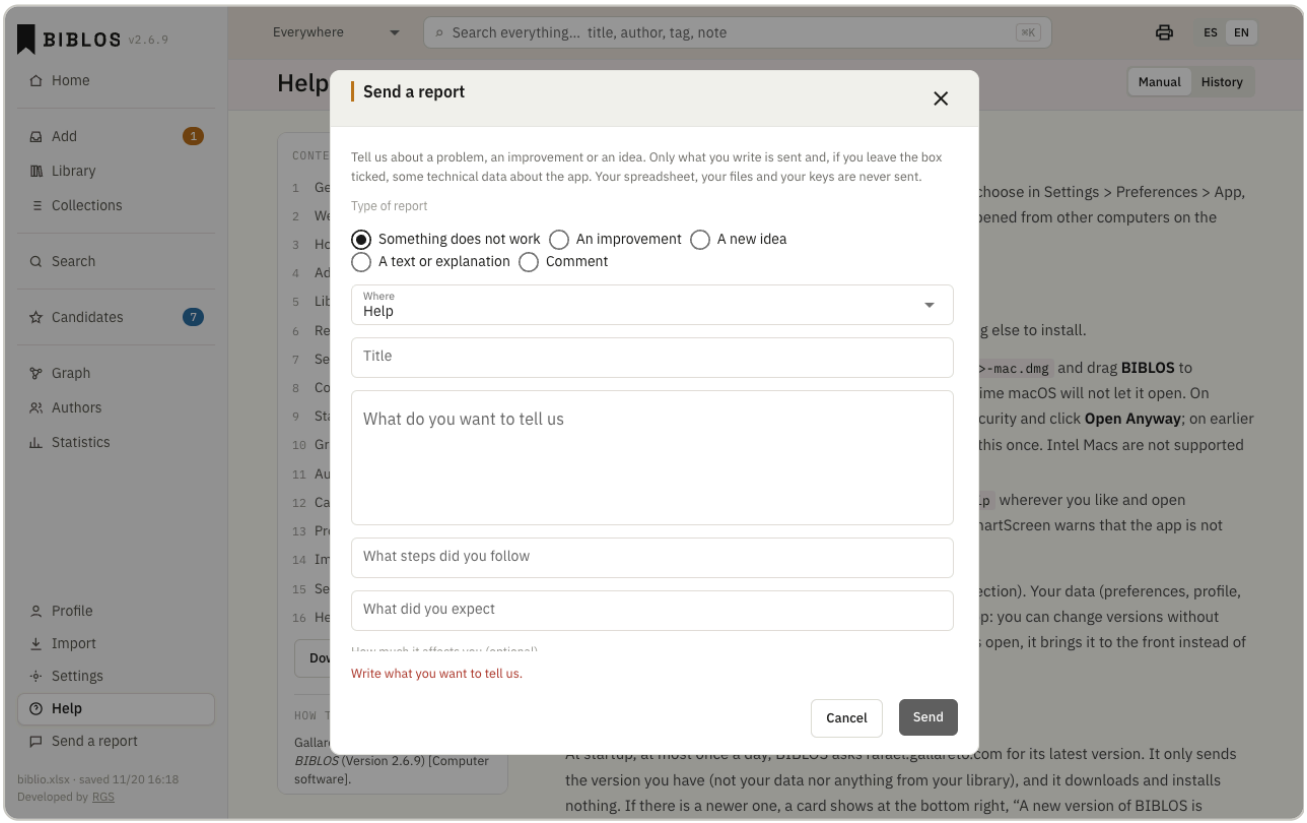
Under the side contents, below **Download manual**, the **How to cite BIBLOS** block gives BIBLOS's citation, with its author, the current year and the version you have; below the citation, the format selector (the same as on the Record) and the copy button. Formats: APA 7 (by default; "... BIBLOS (Version X) [Computer software]. Zenodo. https://doi.org/10.5281/zenodo.24582430"), MLA, Chicago author-date, Harvard, Vancouver, IEEE, your journal styles, BibTeX and RIS. The chosen format stays while BIBLOS is open. The button with the copy icon (its tooltip says **Copy**) puts the citation on the clipboard as plain text ("Citation copied."). The DOI is BIBLOS's DOI on Zenodo: the same for every version, it always points to the latest one. It only shows on screen, not in the printed manual or the PDF.

## History

What BIBLOS changes in the spreadsheet, who and when: each addition (**Added**), change (**Changed**) and removal (**Deleted**), with the initials and the values before and after, and also **Spreadsheet replaced** and **Library emptied**, with the name of the copy. An ORCID written by hand in Authors stays here too. The header box, with **On this page** chosen, searches the history, and **Newer** and **Older** turn the page. History also has its own filter (**Filter the history...**), which follows the header box, and **Download JSON** saves to a file everything the filter lets you see, not only the page on screen; the window asks where to save it.

What you edit directly in Excel does not go through here. The history starts with the version that brought it and survives Empty and Replace. It is a record to consult, not a copy: long values are cut.

## Send a report




— Report form

**Send a report** is in the sidebar, below Help, and opens from any page. It is a form:

- the type: **Something does not work**, **An improvement**, **A new idea**, **A text or explanation** or **Comment**;
- **Where**: already filled with the page you were on;
- title and **What do you want to tell us** (required): the field starts at 5 lines and grows with what you type;
- if something does not work, **What steps did you follow** and **What did you expect**;
- **How much it affects you** (optional): it blocks me, it bothers me or it is a detail;
- email, optional, only used to reply to you;
- **Attached files** (optional): up to 3 and 5 MB in total (images, PDF, txt or csv). A screenshot may show your data: check it first.

The **Attach technical data** box is ticked: it adds the BIBLOS version, system, language, page and mode. **What is sent** shows the exact text that goes out. **Never** does any data from your spreadsheet, paths, titles, notes or keys go out.

The **Attach the app log** box (unticked) adds the last lines of the log, which may carry titles or paths: tick it only if you are asked to.

If you close the form without sending, the draft is kept and comes back next time; **Start over** discards it.

On sending, “Report BIBLOS-0001 received. Thank you for telling us.” appears. At most 3 links per report; there is a cap on reports per hour and per day. If the reports server is out of date, BIBLOS says so (“The reports script is out of date…”) and offers the same. If it cannot be sent (no connection or no service), **Send by email** opens your mail program with the text, and **Copy the text** copies it so you can paste it anywhere.