# BiblioTech Help

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#### INSTALLATION

We advise you to create a separate subdirectory for BIBLIOTECH. Creating a new directory is best accomplished using the Windows File Manager. Just choose the Create Directory option from the File menu of File Manager. We suggest using the directory name BIBLIO. Next, copy all the files on your BIBLIOTECH disk to your new directory. The only file necessary for running the program is BIBLIO.EXE ( or BIBLIODEM.EXE for the demo version). However, the export styles are kept in a separate file called BIBLIOG.STY which should also reside in the BIBLIOTECH directory. Sample bibliography files with the extension .BIB are included. In addition, Word for Windows support will be improved with special Macros, located within the file, BIBMACS.DOC. Your disk will also contain a file named README.TXT which is a text file containing last minute updates to the program. If you double-click on README.TXT in the file manager, you will be able to read the file with the Windows Notepad.

In order to access BIBLIOTECH easily, you should place BIBLIOTECH within one of your WINDOWS Program Manager groups. To do this, after you have installed the program and related files in the appropriate directory, close the File Manager and go back to the Program Manager. Next, choose New from the Program Manager File menu and select New Item. Press the Browse button and a directory box will popup. Locate the directory into which you have just placed BIBLIOTECH and select BIBLIO.EXE. Then hit OK , and OK once again.

#### **ENTERING CITATIONS**

Let's go throught the process of entering a citation and exporting a citation to a manuscript with BIBLIOTECH:

Consider the following citation as an example:

Smith JM, Thompson RJ, Jones EF. Cholesterol and heart disease. New Engl J Med. 1987;23(5):226-232

This citation would be broken into the following fields:

AUTHORS: Smith JM, Thompson RJ, Jones EF TITLE: Cholesterol and heart disease.

SOURCE: New Engl | Med. 1987;23(5):226-232

The SOURCE field could further be broken down into the following:

JOURNAL: New Engl J Med

YEAR: 1987 VOLUME: 23 ISSUE: 5

PAGES: 226-232

Let's go through the process of entering a new reference. Let's start with a blank slate, a new Bibliotech file. If no file is currently active, then you're all set. If there is a currently active file, you must choose NEW from the FILE menu. This will make a fresh reference item available. If you were already working within a reference file, simply choose New Item from the Edit menu or choose the New Item Icon (The one that looks like a blank index card).

First, we must enter the AUTHOR and TITLE fields are entered directly into their respective boxes.

Note: The AUTHOR field must be in the following format:

Smith IM, Roberts RH, Jones EF

That is, the author names must be separated by commas and for each author name, the last name must precede the initials of the first and middle name(s). First and middle initials should not be followed by periods, and the last name should not be followed by commas. The following are examples of incorrect author formats:

Smith J.M., Roberts R.H., Jones E.F. or Smith, JM, Roberts, RH, Jones, EF

NOTE: YOU MUST ENTER THE AUTHORS IN THE CORRECT FORMAT. DO NOT ENTER AUTHORS LIKE THE EXAMPLES ABOVE, BECAUSE THE PROGRAM WILL NOT KNOW HOW TO HANDLE THEM!

But don't worry, you will be able to export your citations in any format you like... as long as you follow a few simple rules entering them.

The TITLE field can be entered in any way you like, although it is probably best to follow the standard conventions which include capitalizing only the first letter of the title and placing a period at the end of the title.

The SOURCE field cannot be entered directly. This must be broken into its separate components, including Year, Journal or Book, Volume, Issue, and Pages. BIBLIOTECH prompts you for these fields when you press the SOURCE button. Additional source fields for Editor, Publisher, and City are present for book citations (but are not used for journal citations). After you have entered the Source field, if this is a new item, you will be prompted to save the item. It's a good idea to say Yes if you intend to save the item. If you add an abstract field, you must then remember to Re-save the item after you have entered the new abstract. Book References:

Book references are generally in one of two styles:

Smith JM, Roberts RH. Non-Invasive Cardiology. Knopf. New York, 1991

or

Smith JM, Johnson PT. Cardiac Imaging Techniques. in: Sampson JH, ed. Non-Invasive cardiology. Knopf. New York, 1991

When entering a book reference, you must enter the additional fields of Editor, Publisher and City in the Source field. If you are referencing an article or chapter in a book (as in the second example above), put the name of the book in the Journal or Book field. If you are referencing a whole book (as in the first example), leave the Journal or Book and Editor fields blank. Be sure to mark the Book Reference checkbox in the top of the Source dialog box. Note: If this is a book reference without an editor, the Book Reference checkbox must be checked.

Finally, an ABSTRACT field exists which can hold the abstract for the citation or any other notes you wish to keep about that citation. This field will be truncated if it exceeds 3072 characters in length. The ABSTRACT field can be used to store any information you wish about the reference.

Now that you have entered the reference item field by field, you MUST save it.

#### **SAVING ITEMS**

### Save Item

Once a citation is entered, you must save it, if you haven't already done so after entering the Source field. This is accomplished by pressing the SAVE ITEM icon with the mouse. If a bibliography file is already open, the new citation will be appended to that file. If no file is open, you will be prompted for the name of a new bibliography file. The default extension for bibliography files is .bib, which will be appended to any file name that doesn't already have an extension.

### New Item

If you wish to now enter a new reference, you must press the NEW ITEM icon or select New Item from the Edit menu. This clears the current citation. Don't worry, if it has been saved, you won't delete it by pressing NEW ITEM, as this will just clear the work area for additional citations. If the item has not been saved using the SAVE ITEM button, it will be lost.

# Saving a Reference File

To save a reference file, simpy choose SAVE AS... from the File menu or, alternatively, choose the Save As Icon button (second from left). The default file extension for Bibliotech files is .bib.

#### **SEARCHING FOR ITEMS**

Pressing the Find Item button or choosing Find Item from the Edit menu will bring up the Find Item dialog box (a dialog box is just one of those pop-up windows that is used in Microsoft Windows to prompt the user for input) and allows you to search your file for keywords, author names, journals, or any other information stored in the citation fields. In addition to prompting you for the text to search for, the Find Item dialog box allows you to select whether or not to search abstracts. Searching abstracts makes the search more comprehensive, although may not be necessary for some applications and may

take longer for very long bibliography files. The default is to not search abstracts. Another checkbox you can check in the Find Item dialog box is for the search to be case sensitive. Case sensitive means that the search will pay attention to upper and lower case letters in both the text to search for and the text it is searching. The default is off, and the program will ignore whether words are upper or lower case.

Version 3.0 of BiblioTech has added Boolean operator support for the FIND ITEM function. Now you can search for a combination of words. Three logical operators are used, & for logical AND, | for logical OR and ! for logical NOT. Parentheses are also supported. For example:

fibrillation & Thyroid

will find all references that contain the words fibrillation and thyroid. The logical OR operator would be used as follows:

atrial | supraventricular

This example will find only references that contain either the term atrial or supraventricular. To use the NOT logical operator you must place the ! sign before the word you wish NOT to find:

fibrillation & !ventricular

would yeild only references that contain the word fibrillation and DON'T contain the word ventricular.

Any combination of these operators can be used and, with the aid of parentheses, quite complex searches can occur:

(atrial | supraventricular) & fibrillation

will yield only those references that have either the word atrial or supraventricular and the word fibrillation.

Note: you must use the single character logical operators &, |, and ! rather than the actual words AND, OR and NOT. Also, be sure to remember to close parentheses if you use them.

# **MOVING AROUND YOUR REFERENCE FILE**

# GO TO...

Choosing the Go To.. item from the Edit menu brings up the Go To Dialog box which allows you to move directly to a specific reference.

#### Left Arrow

This button simply moves to the previous citation in the database. The citations in the database are not sorted, but exist in the order in which they were entered. A better way to navigate is by using the BiblioView window, which sorts citations alphabetically by author.

# Right Arrow

This button moves to the next item in the database. An error message will pop up when you reach the end of the file.

# **Double Left Arrow**

Moves to the beginning of the file.

# **Double Right Arrow**

Moves to the end of the file.

### **CHOOSING AN EXPORT STYLE**

Two steps are required to export a reference to your manuscript in the format called for by the manuscript. First, you must select the journal style in which you want to the reference to be exported; second, you must choose a reference and export it. Here's how to choose your journal style and then export a reference to a document:

### JOURNAL STYLE Listbox

The JOURNAL STYLE listbox in the upper left hand corner of the screen allows you to choose the style of the exported citations. That is, if you choose to export a citation to your word processor or to a file, you can choose what format you'd like the citation to appear in. For example, choosing New Engl J Med will put all exported citations in the style required by the New England Journal of Medicine for all manuscript citations. The DEFAULT selection chooses the default export setting, which is format required by the great majority of journals. Choosing NEW STYLE brings up the STYLE EDIT dialog box, and allows you to create a journal style that isn't already supported by BIBLIOTECH.

#### **EXPORTING A REFERENCE**

see also...

Export to text Export to File

Using the Export Menu

Exporting citations in any format you like is what BIBLIOTECH is all about. Consider our original example citation:

Smith JM, Thompson RJ, Jones EF. Cholesterol and heart disease. New Engl J Med. 1987;23(5):226-232

If we were placing this citation into a paper that was being submitted to The New England Journal of Medicine, it would be formatted like this:

Smith JM, Thompson RJ, Jones EF.Cholesterol and heart disease. New Engl J Med . 1987;23:226-232.

But if we were submitting it to Nature, it would have to be in the following format:

Smith, J.M., Thompson, R.J. and Jones, E.F. New Engl J Med 23, 226-232 (1987).

BIBLIOTECH takes care of these mundane matters, automatically. Simply choose the journal style (from the Journal Style listbox) in which you wish to export the citation. Then, choose Export Reference from the Export menu or press the Export icon button (looks like an outbox). This places the reference (in the style you've chosen) on the Windows Clipboard in text format, which means that now any Windows program has access to it. As with all standard clipboard procedures, you can place the reference into your word processor simply by using the paste function from the edit menu of your word processor (but be sure NOT to use the copy function from the edit menu of BIBLIOTECH, as this will simply copy whatever text you've selected and will not place your reference in the correct format).

How you actually enter the citation into your document depends on how your word processor handles footnotes or endnotes. In Word for Windows, the most commonly used Windows word processor, the process is rather easy. If you wish to enter a numbered citation, simply choose Insert Footnote from the Insert menu. A dialog box will pop up allowing you to select whether you wish the note to be auto-numbered or if you wish to place your own reference mark. Auto numbering is very convenient for numbered footnotes or endnotes, because it allows you to move text around, and the word processor will automatically renumber your notes. To insert your reference, hit the OK button and Word for Windows will place the reference mark or a number into the text, and open up the footnote pane on the bottom of the screen. Now, assuming you have already exported the reference to the clipboard using Bibliotech, to place the formatted citation into your text, simply choose Paste from your word processor's Edit menu. The options button in the Insert Footnote dialog box allows you to define whether you wish to have the notes placed at the bottom of each page, or at the end of the document. Please see your Word for Windows manual for more information on handling footnotes.

### **EXPORT TO TEXT**

Some journals require articles to be referenced by authorname directly in the text of your manuscript:

Johnson and Johnson (1989) showed that aspirin reduces the incidence of migraines in Pima Indians.

or...

The incidence of myocardial infarction after activity has been shown to be less than 1% in an otherwise healthy population (White et al. 1988).

BIBLIOTECH accommodates this type of reference also. Simply choose Export to Text from the Export menu. The sub-menu that pops up when you make this choice offers two further options which indicate which format you'd like the exported reference to be in:
...(Smith, 1987) or ....Smith (1987).

The exact style of the exported reference is dependent on the InText Style field in the Edit Style dialog for that particular journal style. Of course, this will only place the In text reference into your text and won't place the actual citation. You must place the full citation into your bibliography. This is accomplished differently in different word processors.

# **EXPORT TO FILE**

Choose Export to File when you don't wish to export your citations directly to a Windows based word processor, but would prefer to create an ASCII file which contains a your reference list for later incorporation into a word-processor document. This feature is especially useful when you are using a non-Windows based word processor such as WordPerfect. The first time you choose Export to File you will be prompted for a file name to create. The default extension on this file is .REF. Thereafter, every time you choose Export to File your formatted reference will be appended to that file. Beware, if you choose Export Reference from the Export file, you will still export your reference to the Windows clipboard, not to your export file. Before accessing the reference file from your word processor, you must close the file. This is done automatically if you exit the program.

#### **BIBLIOVIEW WINDOW**

The BiblioView feature is one of the more useful of BIBLIOTECH. When you choose BiblioView, either by choosing BiblioView from the Bibliography menu or by hitting the BIBVIEW icon button, a new window pops up which contains a list of all the references in the current bibliography file sorted in alphabetical order by author. Listed next to each author name is the year of publication and the title of the article. The BiblioView window can be moved about or sized like any Windows window. It can even be minimized to an icon.

BiblioView allows you to navigate the reference file simply by choosing the article you wish from the list (if the list has more references than can fit in the listbox, use the scroll bars on the right hand side of the window to scroll up and down through the list). Notice that by choosing an item in the BiblioView window, you change the item shown in the main screen.

The BiblioView window has its own menu which duplicates some items on the main screen menu. While this may seem somewhat redundant, the reason for it is that it is possible (and perhaps at times desirable) to hide the main window and use only the BiblioView window. The BiblioView window is, after all, much smaller than the main window, and may contain enough information to allow you to choose references. It may be much easier, for example, to use the BiblioView window alone in conjunction with your word processor.

If the Hide Main Window selection from the Bibliography menu is checked, then anytime you open the BiblioView window, the main window will be hidden. You can also choose to hide (or show) the main window while in the BiblioView window by choosing those items from the BiblioView menu or by choosing the BiblioView Icon. Alternatively, if the main window is hidden, you can show it by double clicking on your reference selection.

#### **IMPORTING FROM A DATABASE**

Bibliotech allows you to download bibliographies directly from literature searches, thus freeing you of the need to type in references manually. Currently, Bibliotech supports importing from databases that are formatted in the National Library of Medicine (NLM) standard format. These include, Medline ( and Grateful Med), Paperchase (NLM format must be specifically requested in printout). Additionally, Bibliotech supports BRS Colleague and the PsychLit database. Other services will be supported in the future if user interest warrants. The National Library of Medicine format is perhaps the most common for Biomedical services. Here is an example of what the NLM format looks like:

AU - Presti CF

AU - Hart RG

TI - Thyrotoxicosis, atrial fibrillation, and embolism, revisited.

AB - [No Abstract Available]

AD - Department of Medicine (Cardiology and Neurology)

AD - University of Texas Health Science Center

AD - San Antonio 78284.

SO - Am Heart J 1989 Apr;117(4):976-7

DP - 1989 Apr

TA - AMERICAN HEART JOURNAL

PG - 976-7

IP - 4

VI - 117

UI - 89190370

To import from one of these databases, you must first download a search onto your hard disk (or a floppy). Consult the instructional information offered by whichever service you subscribe to for instructions on how to download a search. After choosing the database from which you wish to import from the Import menu, a File Open dialog box will ask you the name of the import file. If a Bibliotech reference file is already open, the references that you import will be appended to the currently open Bibliotech file. If no file is open, you will be prompted for the name of the bibliography file you wish to create.

# **PRINTING REFERENCES**

You may print the current reference or all the references in a Bibliotech reference file. In addition, you can choose whether to include the abstract in the printout. Print References

Choose the Print Reference command from the File menu, or choose the Print Reference icon button to print one reference or all references in a given file. The Print Reference dialog box will allow you to choose whether you wish to print the current reference only or the entire list and whether you wish abstracts to be included or not. In addition, you will be able to select or setup a printer.

#### **ENTERING YOUR OWN STYLES OR MODIFYING EXISTING ONES**

One of the most powerful features of Bibliotech is the ability to define your own export styles. This allows you to accommodate just about any journal style that exists, even if one isn't supplied. New styles are stored in the style file BIBLIOG.STY. Be careful not to erase this file, especially if you have added your own styles. Backing it up from time to time would certainly be a good idea.

# Edit Style Dialog Box

Choosing Edit Style from the Bibliography menu open the Edit Style Dialog box. This allows you to edit the characteristics of the of the currently chosen journal style. While you may not want to edit styles that have already been entered, you may wish to enter new ones, if, for example, you are submitting your manuscript to a journal that BIBLIOTECH doesn't already support.

To edit an existing style, simply choose that style from the Journal Style listbox and choose Edit Style from the Bibliography menu. To enter a new style, choose New Style (always the first entry in the list) from the Journal Style listbox and the Edit Style dialog box will pop up automatically.

# **Entering New Styles:**

When entering new styles, it is best to have a sample of the reference format you are creating. Most journals offer instructions to authors which clearly state how references should be formatted. Here is a synopsis of the fields in the Edit Style dialog box that must be entered for each new style:

Style Name The style

First Author The format that the first authors name should be in.

Middle Authors The format that the middle (2nd to next to last) authors

should be in. These are usually, but not necessarily, the same as the

format of the first author.

Last Author

The format that the last author name should be in. If the last

author

name is preceded by and, check the box at the bottom of the Last Author field.

Et Al Box

Many journals require the author list to be truncated after

а

certain number and the phrase et al inserted. This box asks for the number of authors to allow before inserting et al, which author number should the et al be inserted after, and what format exactly should the et al be in.

Journal Choose Abbreviated when the abbreviated journal name will be used (this is appropriate most of the time) and Full Name when the full journal name should be used. Choose Periods if the journal

name should have periods after the abbreviations. For example:

Am. J. Hum. Genet.

Note: The Journal abbreviated features are not fully implemented in the current version of BIBLIOTECH and will be implemented in the subsequent version.

Year Choose whether the year field should have parentheses around it.

Pages Choose First Page if only the first page should be used in the reference or Full Range if the full range should be used.

# Style Fields

The style fields contain the description of the format styles. These tell the program where to put each field in the formatted reference. The order of the fields is described by means of a simple code. For example A refers to authors, T to title, J to journal, and so forth. The style descriptor field

ATI

would place the authorlist followed by the title followed by the journal. Occasionally, you may want to add additional characters such as punctuation. These can be added in directly. For Example:

A.T:I

would produce a reference that looks like this:

Smith JM, Robards J. The effects of gamma rays on marigolds: New Engl J Med

Here is a key to the style descriptor codes:

Style Descriptor Key:

A Author
T Title
J Journal
Y Year
V Volume
I Issue
P Pages

All other characters are ignored as are characters embedded in single quotes.

In Text Style

This is the key to the In Text reference format. Here we use only the author field A, the year field Y, and a special field e to signify the et al field.

**Book Reference Style** 

In addition to the field keys used in the style descriptor above, this field contains the following additional keys:

E Editor U Publisher C City

# Conditions in the style:

The existence in a reference of Editor, Publisher or City fields can be conditions for the reference style descriptor. For example, if we wanted to include the text 'In:' only if an editor field existed, our book reference style descriptor would look like this:

A. T @E'In:' E, ed.@ J C:U, Y

The @ character and the character that follows (in this case E) begin the condition. In this case, if the editor field is absent, then everything between the @ characters will be ignored. E, U or C can follow the @ character and the presence of editor, publisher or city fields will be assessed.

# **PROJECTS**

A project is simply a way of keeping track of references that are exported to a given project, or manuscript, that you happen to be working on. While reference files may contain all of your references on a given topic, Project files contain only those references that you are actually using in a given document. Think of a project file as another way of keeping track of the references that you are using in your manuscript. The project file allows for easy reformatting of your references into another style. This feature could come in handy if you needed to resubmit a manuscript to another journal. When a project is open, all references that you export will be placed in the current project. If, for example, you export all references for a given project in a style suitable for The New England Journal of Medicine and, after finishing the manuscript, decide to send it to The Annals of Internal Medicine, you could simply call up the project file, and export all the references in the new format to a file which you would then be able to import into your word processor.

# **Project Menu**

### **New Project**

Starts a new project. You will be prompted for the name of your new project file. This command opens a Project Window. The default project file extension is .pro .

### **Open Project**

Opens an existing project and opens a Project Window.

**Save Project** saves the current project and offers the opportunity to rename the project.

**Export Project** allows you to export all the references in the project en masse to an ASCII file which can then be imported into your word processor.

**Close Project** closes the current project window.

Within the project window, the Project Options menu allows you to change around the order of references using the Copy, Cut, Paste and Paste at end options.

# **NEW INSTANCE**

New Instance starts another instance of the program. This is equivalent to choosing the BiblioTech icon from the program manager while BiblioTech is already running. Choosing New Instance will allow you to have multiple BiblioTech files open at one time. The number of instances that you can have open at one time will be limited by your system's memory and Windows resources. Note: Reference records can be cut and pasted between instances. Also, if multiple instances have the same Project file open, any changes to the project in one instance will be immediately updated in the other instance.

# **APPEND**

This allows you to append one Bibliotech file to the currently open file.

# **EDIT COMMANDS**

The Edit commands, Cut, Copy and Paste, function the same way that these commands work in most Windows Programs. They function only on selected text, that is, text which you have selected with the cursor.

Cut Cuts selected text and places it on the clipboard.

Copy Copies selected text and places it on the clipboard.

Paste Pastes text from the clipboard into the current field.

Copy Record Paste Record

These commands allow you to copy an entire record which can then be pasted into a different place in the current file, into a different file, or into a file that is open in another instance of the program. You may find, for example, that a certain reference belongs in one reference file, but not another. These functions allow you to easily exchange data between files.

### **USING BIBLIOTECH WITH YOUR WORD PROCESSOR**

BiblioTech is designed to work with any Microsoft Windows based word processor. This includes, but is not limited to, Microsoft Word for Windows, WordPerfect for Windows, Ami Pro for Windows, JustWrite and many more. Special macros have been included in the package to facilitate using BiblioTech with Word for Windows, but this does NOT mean that you won't be able to use Bibliotech with another word processor (if you own another word processor, check with CGSoft... macros should be available shortly).

As mentioned before, the best way to use BiblioTech with a word processor is to have both BiblioTech and your word processor and document open at the same time. As you work on your document, you can flip back and forth between the word processor and BiblioTech, finding relevant references and exporting these to your document. In Word for Windows, this is facilitated by using the Insert Footnote command from the Insert menu. Most scientific journals require numbered references, and the Auto-Number feature in Word for Windows handle most of this automatically. In fact, if you move a block of text that contains auto-numbered footnotes, the footnotes will move too and the numbers will be changed accordingly.

Hint: Many scientific journals require that reference notes that refer to a previously defined reference take on the original reference number (for example, the sixth reference in a manuscript refers to the citation listing in reference # 1, it would be given the number 1 not 6. To have Word for Windows automatically keep track of this for you, you must define your new reference as a cross-reference to the first as follows: Highlight the footnote reference mark to the first reference (the one to which you are referring) and choose Insert Bookmark from the Insert menu. Then, choose a reference name for that reference (use something other than REF1, for example the author's last name). Then, where you wish to insert a new reference mark that refers to the same reference, instead of choosing Insert Footnote, choose Insert Field from the Insert menu. In the Insert Field dialog box, choose Footnote ref. from the Field type list box. then type the name of the reference you defined as a bookmark previously in the Field Code box at the bottom after FTNREF.

Entering references into a document in Generic format:

It's very likely that you may want to include references in your document before knowing what journal style you'd like them to be in. One way to get around this problem is to use the project feature to store all the references for a given manuscript as a separate project which can be re-exported to a document at a later time. With Word for Windows, however, there is a better solution. Simply export your references to WFW in BIBLIOTECH Generic format (BIBLIOTECH on the Journal Style List Box). This will place the references into the document in a special parsable format. Bibliotech will later be able to convert these to any format you like, with the aid of a WFW macro that we included (BIBCONVERT).

To use this feature, first be sure you've installed the Word for Windows macros that came with BIBLIOTECH. Start Word for Windows, and call up BIBMAC.DOC. Hit the Install macros button and install all the macros listed to your NORMAL.DOT template. If you wish, you can add any of these Macros to your menus (see your Word for Windows documentation for more information on using macros).

To run the BIBCONVERT macro, you MUST be running BIBLIOTECH concurrently with Word for Windows. If a Bibliotech file is open, close it. It's best to run this macro while Bibliotech is empty. Choose the style you wish to use form the Journal Style List Box in Bibliotech. Then, when you run the macro, all the generic format references in your document will be converted to the style used by the currently running

version of Bibliotech. NOTE: DO NOT HAVE MORE THAN ONE VERSION OF BIBLIOTECH OPEN WHILE RUNNING THIS MACRO!.

When you run the BIBCONVERT macro, word for windows selects each footnote reference, places it on the clipboard and sends Bibliotech a message to convert it. Bibliotech then converts the file to the proper format and sends it back to WFW, where it is pasted back into the footnote.

Users of other word processors please note: We are currently working on version specific versions of this macro. Call if you are interested!