

Chapter 2

Installing and Upgrading

Overview

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This chapter covers single user and network installation procedures for the ProCite program and includes a section about upgrading. It also lists and describes installed files.

Hardware and Software Requirements

To install and run ProCite, your computer and system software must meet the following minimum requirements under Windows or on a Macintosh:

Windows

- 486 or later (Pentium recommended) personal computer or compatible
- Microsoft® Windows® 95/98 (or later) or Windows NT 4 (or later)
- 16 megabytes available memory (32 recommended)
- 30 megabytes available disk space for the full installation of ProCite
- CD-ROM drive for installation (please contact ISI ResearchSoft if you require 3.5 inch disks)
- Microsoft Word 7.x, 97, or 2000, or WordPerfect 7.x, 8.x, or 9 to cite while you write (optional)
- Internet connection for online database searching (optional)

Macintosh

- Power Macintosh or compatible (120 MHz recommended)
- Apple Macintosh System 7.5 or later (7.5.5 or later recommended)
- 16 megabytes available memory (32 recommended)
- 30 megabytes available disk space for the full installation of ProCite
- monitor with minimum 16 greys or 256 colors, 640 x 480 or larger
- CD-ROM drive for installation (please contact ISI ResearchSoft if you require 3.5 inch disks)
- Microsoft Word 6 or 98 to cite while you write (optional)
- Internet connection for online database searching (optional)

Installing ProCite

Before you begin, quit from any open applications, screen savers, etc. to prevent conflicts and give the installer room to work.

Note: Make sure you have your ProCite 5 serial number available. You will be asked to enter this number during the installation process. Look on the registration card, on the CD envelope, inside the front cover of the manual, or on the bottom of the ProCite box.

To install, you need the ProCite installation CD.. Insert the installation CD. The installation program may start automatically. If it doesn't, run **Setup (Windows)** or **Install ProCite 5 (Macintosh)**. Follow the instructions on your screen. The amount of time it takes will depend upon the speed of your computer.

By default, the installer places ProCite in the folder "Program Files\ProCite5" (Windows) or "ProCite 5 Folder" (Macintosh) so as not to interfere with earlier versions.

For more detailed installation instructions, read one of the next two sections: *Single User Installation* or *Network (Multi-User) Installation*.

Single User Installation

Before you begin, quit from any open applications, and find your ProCite 5 serial number.

To install the single user version of ProCite:

1. Insert the ProCite CD into your CD-ROM drive.
2. Under Windows, the installation program should start automatically. If the installation program doesn't start automatically, double-click on **Setup (Windows)** or **Install ProCite 5 (Macintosh)**.
3. Follow the instructions on your screen.

Before installing files, the installation program displays:

- A Readme file that may contain late-breaking news about the installation process or the ProCite program itself
- A license agreement which details terms of use
- A form requesting that you enter your ProCite 5 serial number.

When done, the installation program closes and returns you to the desktop.

For a description of installed files, see *Installed Files and Their Locations* later in this chapter.

Start ProCite by double clicking the ProCite 5 icon. Under Windows, you can go to the **Start** menu, select **Programs**, then **ProCite 5**, and then the **ProCite** icon.

Network (Multi-User) Installation

The multi-user version of ProCite is licensed for a particular number of users. You can install ProCite on a shared network for simultaneous use, or you can install ProCite locally for each of the licensed users.

Note: Accessing ProCite from a network server can be quite slow for Macintosh users. We recommend that Macintosh users install locally. A network administrator should first install the ProCite program on the network. The installation includes program files, workforms, journal title lists, output styles, configuration files, and sample databases. Then the administrator, or each user, must install system files and word processor files on each local machine.

Network Program Installation

To install ProCite on a server or other networked drive:

1. Put the ProCite CD in your CD-ROM drive.
2. Under Windows, the installation program should start automatically. If the installation program doesn't start automatically, double-click on Setup (Windows) or Install ProCite 5 (Macintosh).
3. Follow the instructions on your screen.

Before installing files, the installation program displays:

- A Readme file that may contain late-breaking news about the installation process or the ProCite program itself
- A license agreement which details terms of use
- A form requesting that you enter your ProCite 5 serial number.

4. When asked, indicate the network drive and folder where you wish to install ProCite. The default folder is ProCite5 (Windows) or ProCite 5 Folder (Macintosh). If the folder you specify does not exist, ProCite creates it.

All ProCite files install on the network in the folders defined by the installation program. If you need more information about the files that are installed, see the *Installed Files and Their Locations* section later in this chapter.

You will need to install certain system files and word processor files on individual user machines as described in the next section.

Network User Installation

Notes: You need full access (read and write privileges) to Microsoft Word's Startup folder in order to install *cite while you write* support for Word.

To install required system files and optional word processor files on individual user machines:

1. From the local machine, go to the ProCite program folder on the network drive.
2. Double-click to start the Netsetup program found in the ProCite folder. Follow the onscreen directions.

The Netsetup program installs the required system files, word processor files for Microsoft Word if it is installed, word processor files for WordPerfect if it is installed, and ProCite icons for your desktop.

If you install Word or WordPerfect at a later date, you can manually install word processor support as described later in this chapter.

If any of the required system files are absent from the System folder, ProCite will either not start up at all or will display an error message during startup. If this happens, run the ProCite installation program from that particular machine. The ProCite installation program checks the System folder for required files, and adds those that are missing.

Keeping Local Copies of Lists, Styles and Databases

You may want to copy journal title lists, output styles, and the Sample Database to your local machine. Copy the files from the network installation of ProCite to your machine.

You will need to indicate the appropriate file folders the first time you run ProCite if you have changed the installation folders from the default settings or when you want to use local files. In ProCite, select **Options** from the **Tools** menu and click on the **File Locations** tab. Select the appropriate drive and folder for each product component and click **OK**.

ProCite will remember the new settings for your machine unless you change them again. If you do not set preferences, ProCite will always look for files in the default ProCite folders.

Sharing Databases

When sharing databases on a network, you can run into several multi-user situations:

- Any number of users can open the same database with read-only access. You may want to place the database in a read-only folder to make sure the database is always available to multiple users.
- One user at a time can open a database with read-write access. If a user already has a database open with read-write access, ProCite will tell other users that the database is already in use. The database is not available to others until the user with read-write access closes it.
- If a database is in use by someone, with either read-write or read-only access, you will not be able to open the database with read-write access.
- If you want to share a ProCite for the Macintosh database with a ProCite for Windows user, add the extension .PDT to the primary database file name.

Installing "Cite While You Write" Support

Cite while you write support for your word processor is added automatically during ProCite's installation. However, if you installed your word processor *after* installing ProCite, or the ProCite 5 commands do not appear on your word processor's **Tools** menu, you can install the *cite while you write* files.

Under Windows, you can run one of these files to install support:

Single User: In the ProCite program folder, run Cwyw Setup.exe.

Network User: In the ProCite program folder, run NetSetup.exe.

If these setup programs do not install *cite while you write* support correctly, you need to manually install support. See one of the following sections:

- Word for Windows
- WordPerfect for Windows
- Word for the Macintosh

Word for Windows

To manually install support for Word, copy the appropriate files (listed below) from ProCite's CWYW folder to Word's Startup folder (for each copy of Word). The Word startup folder is typically:

C:\Program Files\Microsoft Office\Startup\

This folder can also be specified in Microsoft Word's "Tools:Options:File Locations" dialog. Check the folder location before copying any files.

Note: You need full access (read and write privileges) to Word's start-up folder in order to install *cite while you write* support.

Microsoft Word 7.x

Word 7 is installed with Microsoft Office 95. Copy these files from ProCite's CWYW folder to the Microsoft Word 7.x Startup folder:

- Pc5wd32.wll
- Pc5wd7.dot

Microsoft Word 97 or Microsoft Word 2000

Copy these files from ProCite's CWYW folder to the Microsoft Word 97 or Microsoft Word 2000 Startup folder:

- Pc5wd32.wll
- Pc5wd8.dot

After installing the required files, exit and restart any copies of Word that are currently running. When you start Word, ProCite 5 commands appear on the **Tools** menu.

WordPerfect for Windows

The required WordPerfect files are located in ProCite's CWYW folder. You need to tell WordPerfect where to find the files.

To add *cite while you write* support manually for WordPerfect 7.x, 8.x, or 9:

1. Run Regedit.exe, which should be located in the Windows folder.
2. Navigate to:

For WordPerfect 7.x:

HKEY_CURRENT_USER\Software\Perfect Office\WordPerfect\7\Third Party

For WordPerfect 8.x:

HKEY_CURRENT_USER\Software\Corel\WordPerfect\8\Third Party\

For WordPerfect 9:

HKEY_CURRENT_USER\Software\Corel\WordPerfect\9\Third Party\

3. Insert a new string value named DLL#, where # is a number from 1 to 16. Set the new string value's data to:

For WordPerfect 7.x:

C:\Procite5\CWYW\PC5WP7.dll

For WordPerfect 8.x:

C:\Procite5\CWYW\PC5WP8.dll

For WordPerfect 9:

C:\Procite5\CWYW\PC5WP9.dll

Make sure you identify the correct path if you installed ProCite in a folder other than the default.

4. Exit Regedit.
5. Restart WordPerfect. The *cite while you write* commands should now be available from the **Tools** menu, under a **ProCite** submenu.

Word for the Macintosh

ProCite's installation program looks for the default Word startup folders to automatically install *cite while you write* support. However, if you installed Word in a folder other than the default, installed Word after installing ProCite, or find that ProCite 5 commands do not appear on Word's **Tools** menu, you must manually install *cite while you write* files.

Note: You need full access (read and write privileges) to Word's start-up folder to install *cite while you write* support.

Microsoft Word 6

Copy these files from ProCite's CWYW folder to the Word 6 Startup folder:

ProCite 5 Word Add-in

ProCite 5 Word 6 Add-in.dot

The Word 6 Startup folder is typically:

System Folder/Preferences/Word Startup Folder(6)

Microsoft Word 98

Copy these files from ProCite's CWYW folder to the Word 98 Startup folder:

ProCite 5 Word Add-in

ProCite 5 Word 98 Add-in.dot

The Word 98 Startup folder is typically:

Microsoft Office 98/Office/Startup/Word

After installing word processor support, you need to exit and restart any copies of Word that are currently running. When you start Word, ProCite commands appear on the **Tools** menu.

Upgrading from ProCite, Reference Manager, or EndNote

Install ProCite 5 as described at the beginning of this chapter. Do not replace your existing bibliographic software by installing in the same folder. Even if you are a current user of ProCite, do a completely new installation of the program.

This version of ProCite, Windows or Macintosh, can convert data from various ProCite or Reference Manager databases or EndNote libraries:

- ProCite for Windows, all versions
- ProCite for the Macintosh, all versions
- ProCite for DOS, version 1.2 or later
- Reference Manager for the Macintosh, all versions
- Reference Manager for DOS or Windows, version 5.x or later
- EndNote, versions 2.x and 3.x

Note: Reference Manager version 6.x or 7.x users must first update databases with Reference Manager version 8 or later before converting to ProCite for the Macintosh.

The conversion creates *copies* of original files; make sure you have twice as much free disk space available for the copy as is used by the original file. The original files are not changed, and you can delete them after you verify the successful conversion.

This section explains how to convert databases, workforms, lists (formerly called authority lists), and output styles (formerly called punctuation files) from earlier versions of ProCite. It also describes how to delete your old bibliographic program once ProCite is installed and your files have been converted.

We recommend that you retain your previous bibliographic software application until you are sure that your files are successfully converted. Once your files are all successfully converted, you can uninstall your old bibliographic program.

Converting Files

You can easily convert databases created with ProCite, Reference Manager, or EndNote. If you are converting ProCite databases, you can also convert output styles (punctuation files) and lists.

Converting Databases and Workforms

Back up your ProCite, Reference Manager, or EndNote database before you begin. Then, make sure you have enough space on your hard disk for a new database that could be up to twice as large as the original database. ProCite reads the old database and creates a copy of it in the new file format.

To convert databases and workforms:

1. Start ProCite.
2. From the **Tools** menu, select **Convert File** to display a file dialog.
3. In the **List Files of Type** drop-down list, select **All Files**.
4. Locate and highlight the old database name in the file dialog, and click **Open** to convert it. ProCite asks whether it is okay to convert the file.
5. When you click **Yes** to start file conversion, ProCite displays a file dialog.
6. Type a name for the new database, select the appropriate folder for the new database (typically ProCite's Database folder) and click **Save** to start the conversion.

If you created custom workforms with an earlier version of ProCite, they are converted along with your data. You may be prompted during the conversion to verify field mapping for custom workforms. For instance, ProCite now uses field 10 specifically for journal titles. Move all journal title information to field 10; move other types of information in field 10 to an unused field.

ProCite reads the database file and creates a new ProCite database from it. You cannot use the new database with earlier versions of ProCite.

Caution: Do not delete your old database until you have opened the new copy with ProCite 5 and checked to make sure the database is intact.

The ProCite program folder includes these text files which describe how records translate to ProCite 5:

	Windows	Macintosh
Reference Manager for the Macintosh	RM2toPC.rtf	RM2-to-PC
Reference Manager for Windows	RM8toPC.rtf	RM8-to-PC
EndNote	ENtoPC.rtf	EN-to-PC

Converting ProCite Punctuation Files and Lists

If you have been using only the predefined lists and output styles (known as punctuation files in some earlier versions of ProCite), don't bother converting any of them. Simply use the updated versions installed with ProCite.

Note: Before converting these files, first convert your databases. ProCite cannot accurately convert a punctuation file until all workforms are converted and available.

Follow the following procedure for punctuation files and then do it again for lists.

To convert punctuation files or lists for use with ProCite 5:

1. Start ProCite 5.
2. From the **Tools** menu, select **Convert File** to display an Open File dialog.
3. In the **List Files of Type** box, select **All Files**.
4. Locate and highlight any punctuation file (with the extension .PNC) *or* List (with the extension .LST).
5. Click **Open**, and ProCite asks whether to convert the file.
6. When you click **Yes** to start file conversion, ProCite displays a file dialog.
7. In the file dialog, enter a name for the file, choose the appropriate ProCite folder (Styles or Lists), and click **Save** to save the new file to disk.

When converting a punctuation file, ProCite may ask you to map old workforms to new workforms. Map each workform appropriately.

When converting punctuation files or output styles, ProCite automatically translates *Journal Title (09)* to *Journal Title (10)* for the journal workforms. If field 10 is already listed to print for a journal workform, ProCite prompts you for an alternate field number.

8. After a file is converted, the new copy is left open in ProCite. You can edit the file or simply close it from ProCite.

Converting Configuration Files

ProCite 5 uses configuration files to import tagged records. You can create or modify configuration files with Biblio-Link II (Biblio-Link II is installed in your ProCite folder).

If you use only the predefined configuration files, you don't need to do anything at all — those files have been updated and installed in ProCite's Config folder.

No conversion is necessary to use configuration files created or modified with earlier versions of Biblio-Link II. Simply copy your custom configuration files to ProCite's Config folder.

ProCite 5 uses field 10 for journal titles (versions prior to ProCite 4 stored journal titles in field 09). ProCite adjusts for that when importing data, so information directed to field 09 in a journal workflow is automatically sent to field 10.

If your configuration file is set up to send journal titles to field 09 and some other information to field 10, we recommend that you redirect journal titles to field 10 and the other information to an unused ProCite field. If you do not modify the configuration file, ProCite will prompt you for the appropriate field mapping during record transfer.

Deleting Old Files

Once you have converted all of your ProCite, Reference Manager, or EndNote files to the new ProCite 5 format, you can delete the old files.

Note: Do not delete anything, especially databases, until you are sure your data transferred correctly and your new databases are in ProCite 5's Database folder.

Under Windows, later versions of ProCite, Reference Manager, and EndNote include an Uninstall program. If an Uninstall program is available in the program folder, use Uninstall to remove the program rather than deleting it manually.

If an Uninstall program is not available, or the Uninstall program did not delete all files, you can manually remove the old files. Open the old program folder and move any files you wish to save. When you are certain you want to delete *all* files from the old ProCite, Reference Manager, or EndNote folder, you can simply delete the entire folder.

Installed Files and Their Locations

This section describes installed ProCite files. The files are grouped into several components:

- Program Files
- System Files
- Sample Databases
- Workforms
- Journal Title Lists
- Output Styles
- Word Processor Files
- Configuration Files
- Download Files

Default Installation Folders

These are the default installation folders:

Windows

Component

ProCite Program
System Files
Databases
Workforms
Journal Title Lists
Output Styles
Word Processor Files

Import Configuration Files
Download Files
Internet Configuration Files

Default Folder

Program Files\ProCite5
Windows System Folder
Program Files\ProCite 5\Database
Program Files\ProCite 5\Forms
Program Files\ProCite 5\Lists
Program Files\ProCite 5\Styles
Program Files\ProCite 5\CWYW and
appropriate word processor folder
Program Files\ProCite 5\Config
Program Files\ProCite 5\Download
Program Files\ProCite 5\BkwrAPI

Macintosh

Component

ProCite Program
System Files
Sample Databases
Workforms
Journal Title Lists
Output Styles
Word Processor Files

Import Configuration Files
Download Files
Internet Configuration Files

Default Folder

ProCite 5 Folder
System Folder and Extensions Folder
ProCite 5 Folder\Database
ProCite 5 Folder\Forms
ProCite 5 Folder\Lists
ProCite 5 Folder\Styles
ProCite 5 Folder\CWYW and
appropriate word processor folder
ProCite 5 Folder\Config
ProCite 5 Folder\Download
Program Files\ProCite 5\BkwrAPI

The installation program creates these folders and installs all files. If you change the installation folders from the default settings, or you want to use additional files from another folder, you need to indicate the appropriate folders the first time you run ProCite. In ProCite, select **Options** from the **Tools** menu and click the **File Locations** tab. Enter the drive and path name for each product component and click **OK**. ProCite remembers the settings for your machine until you change them, and lists files found in the default ProCite folders as well as the folders indicated here.

Program Files

The ProCite program folder contains the ProCite program and help file, the Biblio-Link II program and help file, a Readme file, the Uninstall program, and various other files. As the ProCite program is updated, filenames may change slightly and new files may appear.

The Readme file contains late-breaking news about installation and operation of the program. You can read the Readme file within the installation program or you can open and read it with any word processor.

ProCite5 (Windows) or ProCite 5 (Macintosh) starts the ProCite program.

Blink2 (Windows) or Biblio-Link II (Macintosh) starts the Biblio-Link II program for creating and editing configuration files, which are used to import data from other bibliographic database sources.

If the help file is deleted or moved, you will not be able to access the ProCite help topics. You can delete the help file, ProCite5.hlp (Windows) or ProCite 5 Help (Macintosh), to save space.

Uninstall removes the entire ProCite program.

System Files

Several System files are required to run ProCite. Most of these files are already present and used by other programs. The installation program checks for the required files and installs them in your System folder if they are not already available.

If any of the required files are deleted or moved from the System folder, ProCite will either not start up at all or will display an error message during operation. You can reinstall ProCite in order to restore system files.

Database Files

Each ProCite database you create is made up of two files. The first file contains the text of your database, and the file with the extension .PDX contains indexes for locating and sorting records. Both files are required in order to use the database. You can create any number of ProCite databases, and should save them in ProCite's Database folder.

We ship two sample databases for you to work with to learn the program:

Windows

Sample Database.PDT
Sample Database.PDX

Turtles.PDT
Turtles.PDX

Macintosh

Sample Database
Sample Database.PDX

Turtles
Turtles.PDX

Chapter 3: Using ProCite: A Guided Tour walks through the basic features of ProCite with the Sample Database.

After experimenting with the sample databases by modifying, adding, or deleting records, copy fresh versions from the ProCite CD.

If you add significant data to a sample database, please save a copy of the database with a new name. Anyone reinstalling ProCite could replace your file.

Workforms

Workforms are the “fill-in-the-blank” forms used to enter data. We supply at least the workforms listed in *Appendix B: ProCite Workforms and Fields*. You can modify the supplied workforms and create any number of additional workforms.

Workforms are stored in ProCite’s Forms folder. Under Windows, the files include the extension .PWF. If you want to use only a few of the available workforms, you can delete the other workforms from the Forms folder. That way the entire list will not appear each time you choose a workform for record insertion. You can later copy workforms from the ProCite CD if you change your mind.

Beware of deleting or changing the predefined workforms, especially if you will be sharing data with colleagues.

If you are using ProCite from a network server, you can use the Windows Explorer or Macintosh Finder to apply a Read Only attribute to the Forms folder. This prevents anyone from modifying the workform files.

List Files

Journal title lists and term lists are used to simplify and control data entry and searching. Journal title lists can also be used to substitute text on output. We supply at least the journal title lists below. You can modify these lists or create any number of custom lists.

Filename	Description of Journal Title List
Chemical	1000+ Chemistry Journals with CASSI abbreviations
Medical - Full	9000+ Medical Journals with Index Medicus abbreviations; inserts full journal names in records and substitutes abbreviations when used for output
Medical - Abbrev	9000+ Medical Journals with Index Medicus abbreviations; inserts abbreviated journal names in records and substitutes full names when used for output
Humanity	2000+ Humanity Journals with MLA abbreviations

Lists are stored in ProCite’s Lists folder. Under Windows, the files include the extension .PJJ.

If you do not find these lists helpful, you can delete them to release disk space.

Output Styles

Output styles make it possible to print your records in a variety of bibliographic styles. We supply many widely-used output styles. You can modify any of these, and you can create any number of additional output styles. You can check for new output styles at our web site:

<http://www.procite.com>.

Output styles are stored in ProCite's Styles folder. Under Windows, the files include the extension .POS. If you use only a few of the available output styles, you can delete the others from the Styles folder. That way the entire list will not appear each time you choose an output style for formatting. If you change your mind, you can copy output styles from the ProCite CD.

Word Processor Files

Word processor files installed by ProCite enable the *cite while you write* feature. When you start your word processor, ProCite commands appear on the **Tools** menu.

If you installed your word processor *after* installing ProCite, you must manually install the ProCite word processor files as described earlier in this chapter.

When you link citations in a manuscript, ProCite is launched. If you move the ProCite program, make sure you start ProCite before you begin inserting citations.

If you run ProCite off a network, and the network is down, you cannot *cite while you write*TM because ProCite must be available.

Windows

Microsoft Word

These files are placed in the appropriate Microsoft Word Startup folder:

Word 7.x: Pc5wd32.wll and Pcwd7.dot

Word 97 and Word 2000: Pc5wd32.wll and Pcwd8.dot

WordPerfect

These files are placed in ProCite's CWYW folder:

WordPerfect 7.x: Pc5wp7.dll and Pc5wp7.wpt

WordPerfect 8.x: Pc5wp8.dll and Pc5wp8.wpt

WordPerfect 9: Pc5wp9.dll and Pc5wp9.wpt

WordPerfect also requires that you direct the program to these files. The installation program does this automatically, or you can do it manually as described earlier in this chapter.

Macintosh

The installer places word processor files in Microsoft Word's Startup folder as well as the ProCite 5 Folder/CWYW folder. These files are placed in the default Microsoft Word Startup folder:

Word 6: ProCite 5 Word Add-in
ProCite 5 Word 6 Add-in.dot

Word 98: ProCite 5 Word Add-in
ProCite 5 Word 98 Add-in.dot

Configuration Files and Download Files

The Import Text tool in ProCite uses configuration files to parse tagged text from various diskette, CD, and online sources and transfer the records into appropriate ProCite workforms and fields. Configuration files are stored in ProCite's Config folder. You can create or modify any number of configuration files with Biblio-Link II. Under Windows, configuration files include the file extension .CFG.

Several download files are also included with ProCite, and are found in the Download folder. These files are included as examples to help you learn how to import tagged records into a ProCite database.

Internet Configuration Files

The Internet Search feature uses configuration files to direct search results into appropriate ProCite workforms and fields. Configuration files used for Internet searching are stored in ProCite's BkwrAPI folder. You can create or modify any number of configuration files with Biblio-Link II. Under Windows, these files include the file extension .CFG. Several Internet configuration files are included with ProCite.

Uninstalling ProCite 5

Before uninstalling, back up any ProCite files you wish to keep.

To remove ProCite 5:

Windows

Use the Uninstall program found in the ProCite folder to ensure that you remove all ProCite program files, word processor support files, and registry settings.

You may need to move or delete databases and other custom files to finally delete the entire ProCite folder.

Macintosh

Delete the entire ProCite 5 Folder by dragging it to the trash. Then, to delete *cite while you write* commands from Microsoft Word, delete these files from Word's Startup folder:

Word 6: ProCite 5 Word Add-in
ProCite 5 Word 6 Add-in.dot

Word 98: ProCite 5 Word Add-in
ProCite 5 Word 98 Add-in.dot