EndNote

EndNote (www.endnote.com) is one of the most used applications to maintain bibliographic data bases and generate bibliographies in scientific works.

The product is widely used for dissertations, theses and scientific publications of all kinds. EndNote iss available for Windows and Mac OS. It is well integrated with MS Word by means of macros and DDE (Dynamic Data Exchange).

Cooperation with FrameMaker

Advantages using EndNote

Although bibliographies can easily be created in FrameMaker by means of cross references, EndNote provides these advantages:

- Maintenance of a bibliographic database for several works.
- The database can be filled with data from various sources including the internet.
- Generated references and citations can adhere to a large number of output formats (most publications require special formatting).

Drawbacks of EndNote

Over the time the various EndNote releases have changed their behaviour significantly, in particular with relation to FrameMaker :

EndNote Version	Handling non-Word files	Cooperation Word	FM
5 (2001-09)	Scans MIF and RTF, handles non-ASCI characters not correctly	+++	++
6 (2002-06)	No scan of RTF or MIF possible – purely a Word thing	+++	0
7 (2003)	Scan of RTF possible, but not MIF	+++	+
8 (2004)	New data base format to support UNICODE; only working with Word, No MIF, but RTF support	++++	+

The more + signs in the above table, the better is the integration of EndNote with the application. Nevertheless the methods described create useful results. They are too elaborate for frequent creations of bibliographies, which, whowerver is not the case for a dissertation …

Conclusion
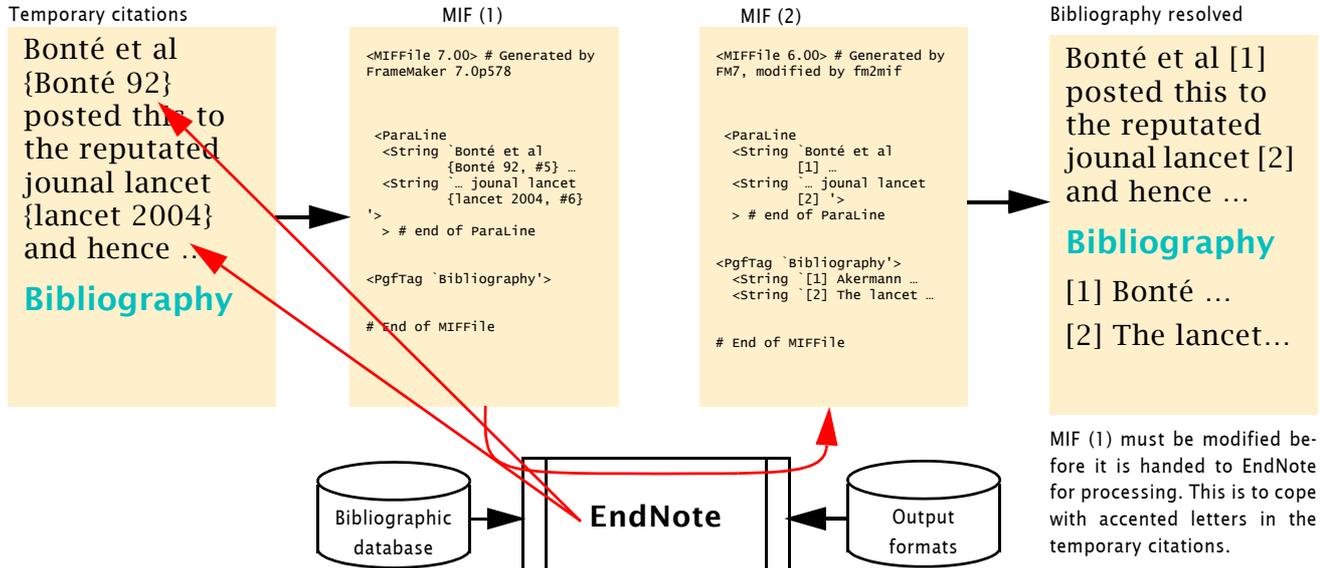
Only EndNote versions 1 … 5 provide the function **Scan Document** in `mif`. Version 6 does not support any scan and starting with version 7 scanning RTF is back which allows to work with most text processors and give some posibilities for FrameMaker.

Note: *Keep in mind that RTF can not reflect all FrameMaker features. Hence a round-trip FrameMaker ➔ RTF ➔ FrameMaker may create insufficient results (e.g. missing frames).*

Bibliography with EndNote 5

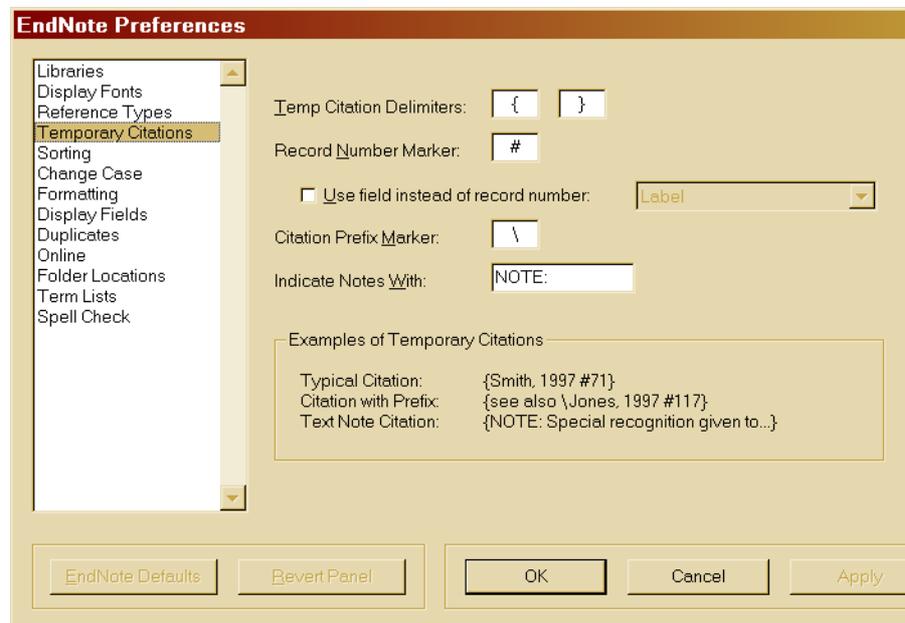Both procedures (with `mif` or RTF) are described here, although I strongly recommend to use EndNote version 5.

Pocess overview

Temporary citations	MIF (1)	MIF (2)	Bibliography resolved
Bonté et al {Bonté 92} posted this to the reputated jounal lancet {lancet 2004} and hence ... **Bibliography**	`<MIFFile 7.00> # Generated by FrameMaker 7.0p578` `<ParaLine` `  <String `Bonté et al` ` {Bonté 92, #5} …` ` <String `… jounal lancet` `          {lancet 2004, #6}` `'>` `   > # end of ParaLine` `<PgfTag `Bibliography'>`  `# End of MIFFile`	`<MIFFile 6.00> # Generated by FM7, modified by fm2mif` `<ParaLine` `  <String `Bonté et al` ` [1] …` ` <String `… jounal lancet` `          [2] '>` `  > # end of ParaLine` `<PgfTag `Bibliography'>` ` <String `[1] Akermann …` `   <String `[2] The lancet …`  `# End of MIFFile`	Bonté et al [1] posted this to the reputated jounal lancet [2] and hence ... **Bibliography** [1] Bonté ... [2] The lancet...

MIF (1) must be modified before it is handed to EndNote for processing. This is to cope with accented letters in the temporary citations.

Setting up EndNote

Set Citation Markers

In EndNote (**Preferences > Temporary Citations**) assure curly braces for Citation Markers, because FrameMaker `mif` uses brackets for many purposes.

Define the reference data base in EndNote

Select a reference data base with **File > Open**.

For your work you might have a specific data base where you collect all references from various sources.
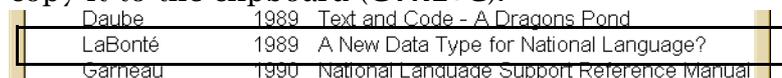

Define the format for the bibliographic items

In EndNote 5 select **File > Output Styles... >** *the desired format*, for example, Numbered. In EndNote 7 it is **Edit > Output Styles**.

Inserting a citation

1 In EndNote select the Citation in the Database view and copy it to the clipboard (**CTRL+C**).

2 Switch to FrameMaker and place the cursor in the document where you want to place the citation.

3 Paste the temporary citation from the clipboard (**CTRL+V**). The inserted temporary citation has the format `{LaBonté, 1989 #11}`.
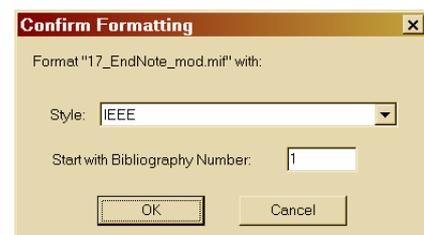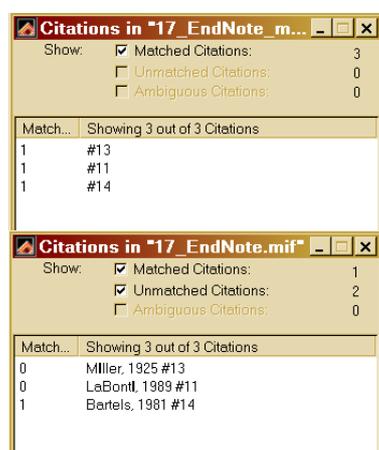
Note: *Do not change this format of the temporary citations until you have finished all the work on your document. Otherwise End-Note (or the utility fm2endnote5) will not find them with Scan Document.*

Creating the bibliography

Note: ***Do not use constructs with braces in Your text.*** *These will interfere with the utility fm2endnot5 or EndNote. This will crate non-matching temporary citations or loss of text. For example,* `{this is a comment}` *is such a construct.*

EndNote can not operate directly on the FrameMaker file. It only can operate on the `mif` files (Maker Interchange Format, which is a plain text file). Hence you need to perform some steps.

1 Save your document (with the temporary citations) in the FrameMaker format. This file will be used later, if you want to change text and/or citations.

2 Save your document as `mif` (**File > Save as...**). You may wish to place this file in a different directory.

3 EndNote can handle the `mif` file correctly only,

   -   if the file header indicates a FrameMaker version 6.00
   -   if temporary citations do not contain any umlauts or other characters from 'upper ASCII'.

4 Hence you need to modify the `mif` file by a utility developed by D+DD (see *Utility mif2endnote5* on page 7-23).

   A `mif` file other than version 6 creates an error message, while the temporary citations with umlauts etc. can not be matched with the data base (0 indication in the match list).

5 In EndNote select **Paper > Scan Paper…**. In the drop down list **Files of type** select **FrameMaker MIF**.

6 Select the `mif` file modified by the utility and click **Open**.

7 EndNote now scans the `mif` file and provides a list of the found (and matched citations)

   Using the unmodified `mif` file will create zero indicators (no match) and distorted text entries:

8 In EndNote choose **Paper > Format…** In case of unmatched temporary citations you will be asked whether to continue or not.

   In the next dialogue you choose the style of the references from the drop-down list. With "Select another Style" any not listed, but installed style can be accessed (e.g. Add Agronomy)

   You may wish to change the name of the output file.

9 Click the **Save** button.

Back in FrameMaker

10 Switch to FrameMaker and open the generated file (for example, `17_EndNote_mod-IEEE.mif`). The citations have changed to an appearance according to the selected format:

   A New Data Type for National Language? [2]

2005-06-15

E:\FM-course\handout_70\EndNote.fm

You may note the
following

- Unresolved Temporary Citations (0 matches) remain in the temporary format.

- Weird input formatting (character style crossing the beginning of a temporary citation, but not the end of it) create weird output formatting.
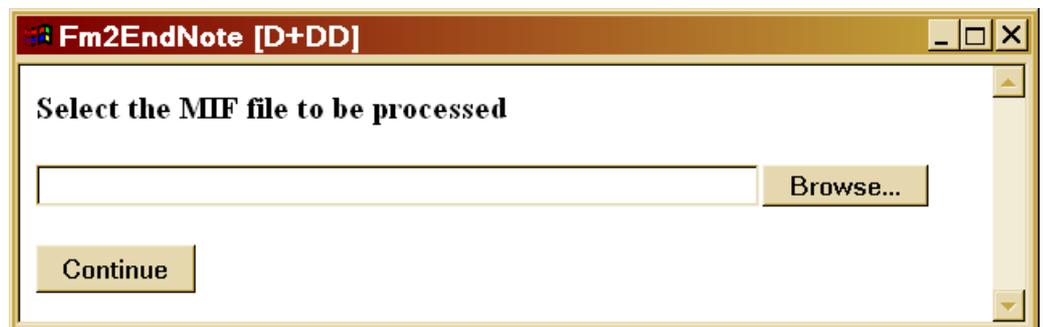
Working files

Be aware that you now have number of files:

1 The original FrameMaker file with the temporary citations (`17_EndNote.fm`). Make any *changes* to text or citations *only in this file.*

2 The `mif` file from this, which is absolutely identical, when opened in FrameMaker (`17_EndNote.mif`). This is an intermediate file, which you may discard after the output file has been generated.

3 The modified `mif` file (`17_EndNote_mod.fm`), which is the input to EndNote. You may discard this file after the output file has been generated.

4 The output from EndNote (`17_EndNote_mod-IEEE.mif`) with the resolved References and the bibliographic list. This is what you should open in FrameMaker for *print or publish*.
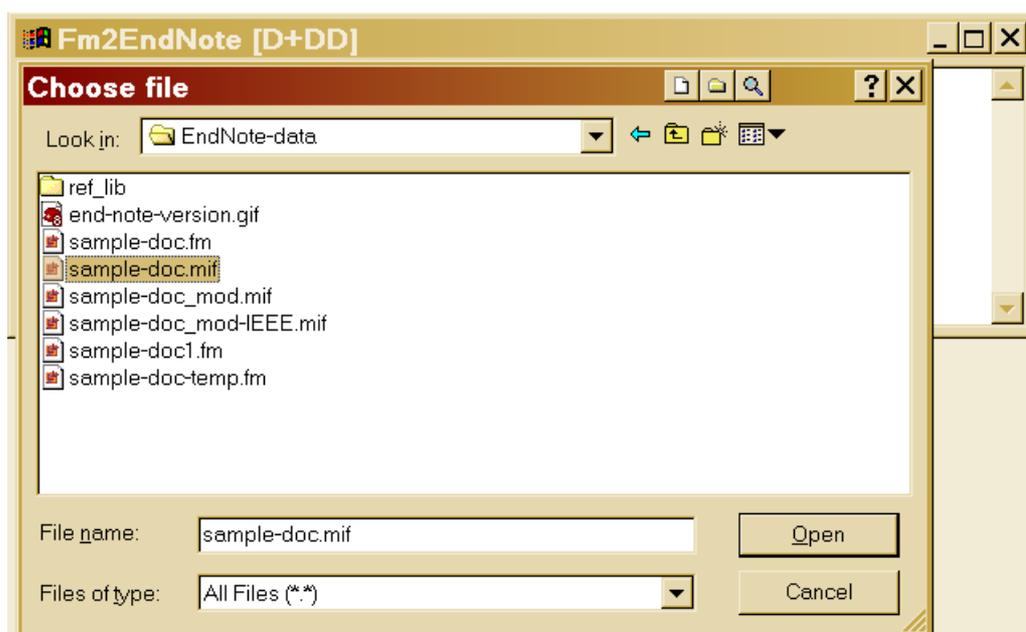
Utility mif2endnote5

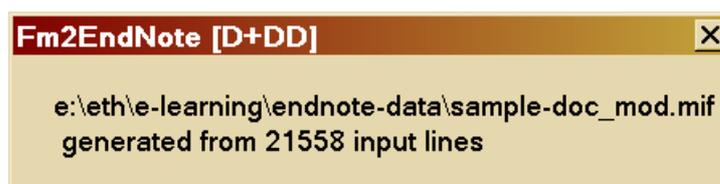This utility modifies the `mif` file to get correct results with the Scan Document function in EndNote 5.

1 After starting this utility, You get the dialogue to select the appropriate `mif` file.

2 With the **Browse** button You enter a standard Windows File selection dialogue. Navigate to the appropriate directory and select the desired file with **Open**:

3 During the process `fm2endnote5` provides progress feed-back at every 1000th MIF line. The end of the process is indicated by a completion message.

4 Click **OK** to leave the utility.

Caveat   Utility `fm2endnote5` can not handle all peculiarities of FM-input (see example on following page):

▪ As you can see from input lines 4 and 5, arbitrary text enclosed in braces "{whatever}" triggers text deletion up to the next opening brace (output line 4).

▪ If the text within braces has the same syntax as the tempo-rary citations (input line 5) then it is treated as such (out-put line 4). EndNote 5 will report a 0-match and leave it alone.

▪ Highlighting (character formats) crossing a citation (input lines 10 and 12) can not be handled correctly. The highlight at the opening brace is relevant (output lines 8 and 9).

Example handling by fm2endnote5

Input

2 Hecate est Iovis et Latonae filia, soror Apollinis. Est tricopor et triceps, magicarum artium magistra ac fascinationum praeses, cinctra latrantium canum turma {Daube, 1989 #5}.

4 Ordinary use of braces {whatever} must not use the same pattern as the temprary citations {something, something #some-

6 thing} stans stans stans split entry at end of this paragraph {LaBonté, 1990 #8}.

8 Lorem ipsum dolor sit amet, nulla facilisi corper susc accumsan et iusto odio dignissim qui blandit **{Bartels, 1981 #14}**

10 praesent luptatum zzril delenit augue duis dolore te feugait nulla facilis {**Bartels**, 1981 #14}, {*Daube*, 1989 #6}, {LaBonté,

12 1989 #11}

Tia non ob ea soluad incommod **quae egen ium improb fugiend**

14 **{Bartels, 1981 #14}, {Daube, 1989 #6}, {LaBonté,** 1989 #11}.

Officia deserunt mollit anim id est laborum Et harumd dereud

14 facilis est er expedit distinct. trenzsa schengos ent kaap zux copy wipont trenz kipg naar mixent phona {Müller, 1925 #13}.

Output

2 Hecate est Iovis et Latonae filia, soror Apollinis. Est tricopor et triceps, magicarum artium magistra ac fascinationum praeses, cinctra latrantium canum turma {#12}.

4 Ordinary use of braces {#something} stans stans stans split entry at end of this paragraph {#8}.
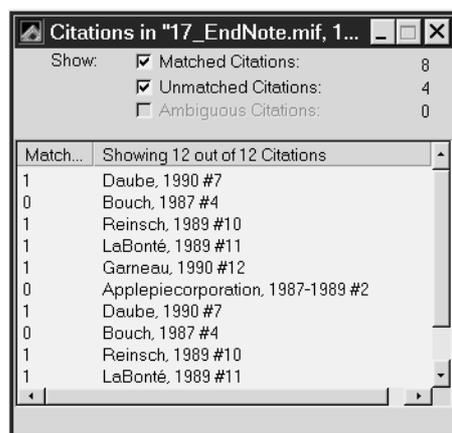
6 Lorem ipsum dolor sit amet, nulla facilisi corper susc accumsan et iusto odio dignissim qui blandit **{#14}** praesent

8 luptatum zzril delenit augue duis dolore te feugait nulla facilis {#14}, {#6}, {#11}

10 Tia non ob ea soluad incommod **quae egen ium improb fugiend {#14}, {#6}, {#11}.**

12 Officia deserunt mollit anim id est laborum Et harumd dereud facilis est er expedit distinct. trenzsa schengos ent kaap zux copy wipont trenz kipg naar mixent phona {#13}.

Bibliography in a FrameMaker book

1 The last chapter in the book should end with the paragraph style *Bibliography*, which is properly set up.Save each file from the book as `mif`.

2 In EndNote use **Paper > Scan Paper…** for the first file. Do not close the report dialogue "Citations in…".

3 Choose **Paper > Scan next > Scan next…** for the succeeding files. This cumulates the references.

```
Citations in "17_EndNote.mif, 1...    _ □ ✕
Show:    ☑ Matched Citations:         8
         ☑ Unmatched Citations:       4
         ☐ Ambiguous Citations:       0

Match...  Showing 12 out of 12 Citations
1         Daube, 1990 #7
0         Bouch, 1987 #4
1         Reinsch, 1989 #10
1         LaBonté, 1989 #11
1         Garneau, 1990 #12
0         Applepiecorporation, 1987-1989 #2
1         Daube, 1990 #7
0         Bouch, 1987 #4
1         Reinsch, 1989 #10
1         LaBonté, 1989 #11
```

4 When selecting **Paper > Format…** EndNote will generate the output `mif` for the first, then for the second etc. input file.

5 Open each of the output files in FrameMaker and save it as an ordinary FrameMaker file (probably into a new directory `...\final\`).

Note: *Be careful with the output file names, because the FrameMaker book process does not know anything about the new names!*

Bibliography in specific chapter

If you want to have the bibliography list in a specific chapter (which might hold only the bibliography),

▪ Create a specific chapter ending with a paragraph of style *Bibliography*, which is formatted properly.

▪ Provide this chapter as the last input file to **Paper > Scan next > Scan next…**

Since in this last chapter no citations are present, EndNote will just place the bibliography there.
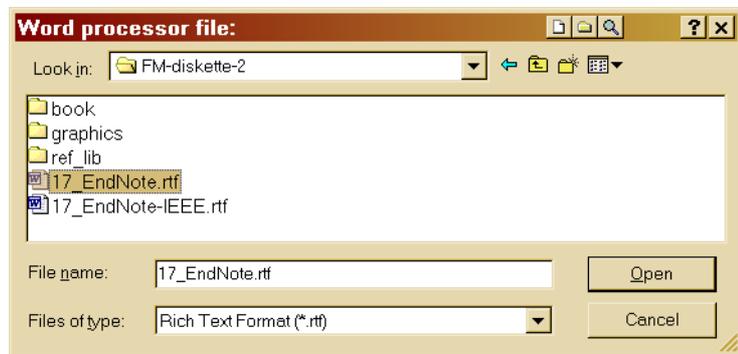
Bibliography with EndNote 7

EndNote can not operate directly on the FrameMaker file. It only can operate on RTF files (Rich Text Format defined by Microsoft). Hence you need to perform some steps.
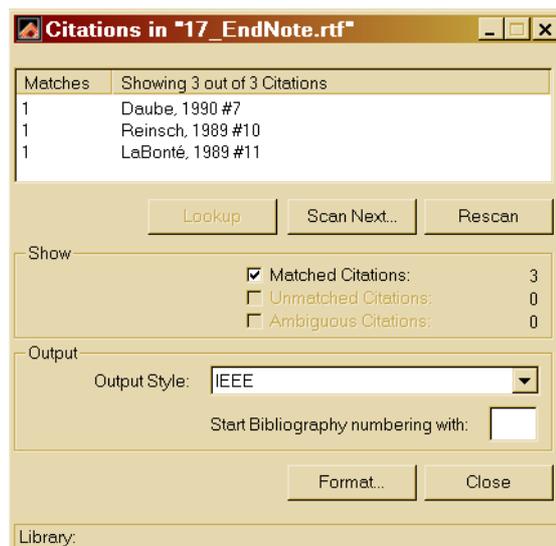
Note: *Keep in mind that RTF can not reflect all FrameMaker features. Hence a round-trip FrameMaker ➜ RTF ➜ FrameMaker may create insufficient results (e.g. missing frames).*

Save your current work

1 Save your document (with the temporary citations) in the FrameMaker format. This file will be used later, if you want to change text and / or citations.

2 Save your document as RTF 1.3 (**File > Save as…**). You may wish to place this file in a different directory or at least provide a different name.

Creating the bibliography

3 In EndNote select **Tools > RTF Document Scan > RTF Document Scan…** The following dialogue will appear.

4 Select the RTF file and click **Open**.

5 EndNote now scans the file and provides a list of the found (and matched citations)

Note: *A zero in the* Matches *column indicates that EndNote was unable to match the temporary citation to a reference. This may be caused by the presence of a citation delimiter used for something other than a temporary citation or by saving as RTF 1.6 rather than RTF 1.3.*

6 Select the appropriate output style and press **Format...** In case of unmatched temporary citations you will be asked whether to continue or not.

You may wish to change the name of the output file:.

7 Click the **Save** button.

Back in FrameMaker

1 Switch to FrameMaker and open the generated file (for example, `17_EndNote-IEEE.rtf`). During **Open** accept the **Unknown Filetype** dialogue with RTF selected.

The layout and internal structure of this FM file is not yet OK. You need to:

2 Import all styles as well as the master- and reference pages from the original FM file (e.g. `17_EndNote.fm`). Most of the paragraphs have "modified formats" indicated by an asterisk after the format name (in the status area).

To avoid the style overrides, follow the procedure *Removing style overrides* on page 3-14 with all options (Paragraph to Math Definitions) checked.

The bibliography is not inserted in paragraphs of format Bibliography, but uses an arbitrary format such as `tli-table-list` from the paragraph catalogue.

3 Save this FM file with a different name than the original FM file e.g. `17_EndNote-IEEE.fm`

4 working files Be aware that you now have 4 files:

- The original FrameMaker file (`17_EndNote-IEEE.fm`) with the temporary citations. Make any *changes* to text or citations *only in this file*.
- The RTF file saved from this (`17_EndNote-IEEE.rtf`). This input file to the EndNote scan process can be discarded after the output file has been generated.
- The output RTF file (`17_EndNote-IEEE.rtf`) from the EndNote scan and format process which inserted the bibliography.
- The FM file created from the generated output RTF file (`17_EndNote-IEEE.fm`). This is what you should *print or publish* or integrate into your final FM-book.

Biblography with EndNote 8

EndNote 8 is UNICODE compliant while FrameMaker is not. Hence EndNote 8 does not cooperate directly with Frame-maker.

Differences in detail
- The temporary references copied to the clipboard are in UNICODE (CF_TEXT[9]) contains the same data as CF_UNICODETEXT; CF_OEMTEXT contains the 8-bit text).

- FrameMaker can not paste these items even with Paste Special. You get only the first character of the temporary citation, which is an opening brace. Obviosly FM does not handle CF_OEMTEXT but CF_TEXT).

- Copying into Word creates a Packaged Object unconvertable to ordinary text. Only after the special EN-function Remove Fieldcodes the created new document can be copied to FM

Addding bibliography to finished work

If EndNote 8 is your tool then the best method is to add the bibliography at the end of your work:

1 During the write up insert arbitrary temporay citations which keeps the information which reference you finally want to insert into the text. For example:

```
According to {Daube, 1981, a} this …
As mentioned in {Daube, 1981, b} there is no …
For … see {Labonté, 1990, a} were …
```

Keep only as much information as needed to distinguish the references and use a format which you can easily find in the text (e.g. with surrounding braces).

Note: *Check your EndNote set-up for the temporary citation delimiters: If you use braces in FM, you should specify double braces or something else in EndNote.*

2 At the end of your work collect the temporary citations in a Word 2-column table. Search the FM document with a text pattern (see *Wildcard-characters for Find dialogue* on page A-4). A pattern to find citations like the ones in step 1 would be: {*|*|*}

Place only temporary citation in a cell in the left column.

FM citation	EndNote citation
{Daube, 1981, a}	
{Daube, 1981, b}	
{Labonté, 1990, a}	

Switch off hyphenation in the Word document.

3 In EndNote 8 search your database for the appropriate references and copy them to the right column of your table:

FM citation	EndNote citation
{Daube, 1981, a}	{{Daube, 1989 #6}}

---

9 CF_TEXT etc are the clipboard formats as defined in Windows.

FM citation	EndNote citation
`{Daube, 1981, b}`	`{{Daube, 1989 #5}}`
`{Labonté, 1990, a}`	`{{LaBonté, 1990 #8}}`

4 Resolve the references in Word with the EndNote command **Format Bibligraphy**. I recommend to use the output format IEEE or another format creating number for ease of reference:

{Daube, 1981, a}	[1]
{Daube, 1981, b}	[2]
{Labonté, 1990, a}	[3]

1. Daube, K. *Text and Code - A Dragons Pond*. in *G.U.I.D* *Conference*. 1989. Basel, Switzerland: GUIDE.

2. Daube, K., *Implementation of Swiss Character Set*. 1989 OBRZ AG: Zürich.

3. LaBonté, A., *Canadian Alphanumeric Ordering Standa Character Sets of CSA Standard*. 1990, Canadian Stand Association: St. Foy, Quebec, CDN.

5 You can not use this file immediately: the information generated by EndNote uses the format "packaged objects" which is an MS specific thing. Save this file as `mydoc-en8a.doc`

6 To get a form you can copy, apply the EndNote command **Remove Fieldcodes**. This creates a second file which you should save this file for later use (`mydoc-en8b.doc`).

7 Print this later file. Remove the table and save the file again with a different name – for example `mydoc-en8c.doc`.

8 In FrameMaker import (by copy!) the last created file (`mydoc-en8c.doc`) to the location where you want to have your biblography and apply the appropriate ¶-format:

1. Daube, K. *Text and Code - A Dragons Pond*. in *G.U.I.D.E. Conference*. 1989. Basel, Switzerland: GUIDE.

2. Daube, K., *Implementation of Swiss Character Set*. 1989, OBRZ AG: Zürich.

3. LaBonté, A., *Canadian Alphanumeric Ordering Standard for Character Sets of CSA Standard*. 1990, Canadian Standards Association: St. Foy, Quebec, CDN.

Note: *EndNote uses local formatting in the text (no Character formats) and puts the numbering in the text. For different formatting (e.g. automatic numbering by FM) you need to edit the text.*

9 With the aid of the printed list of references replace your temporary citations by cross references to the paragraphs in the bibliography. Done!

Adding bibliography incrementally

When extending the documnet after inserting the bibliography you might need to sort in the added bibliography paragraphs manually. Converting the paragraphs to a table and then sort them would destroy the cross-reference markers.

Reference formats in the bibliography

When generating the final format for the citations and the bibliography, EndNote does not know about the character formats in the FrameMaker document. EndNote uses text processing features such as 'italic' or 'superscript' for the in-line formatting.

This applies to EndNote 5 - 7 only

EndNote does, however, use a paragraph style for the bibliographic list: *Bibliography*.

If you do not have a paragraph style Bibliography defined in your document, this style is based on the *last paragraph* in the document.

The paragraph format *Bibliography* should...

- be in the paragraph catalogue,
- use appropriate indentation.

Note: *You must not define a FrameMaker autonumbering feature for the paragraph format (for example, to surround the number in the bibliographic list with brackets). EndNote generates a 'complete text paragraph'.*
You can change the generating pattern in EndNote with **Edit > Output Styles > Edit...** *(stylename)* **> Bibliography > Layout** *to cope with your specific demand. Save your modified style with a different name though!*

Generated by EndNote

[3]›A. LaBonté, *A New Data Type for National Language?*, presented at SEAS Anniversary Meeting, Amsterdam, The Netherlands, 1989.

After applying ¶-style *Bibliography*

[3] A. LaBonté, *A New Data Type for National Language?,* presented at SEAS Anniversary Meeting, Amsterdam, The Netherlands, 1989.

Bibliography style variants

EndNote provides a large number of pre-defined styles according to various publication standards. The formatting definitions are not well documented, at best you learn from the examples (e.g. how to produce a hanging indent, how to append an abstract).

For example, with output style *Generic* you will get reference numbers in brackets and the bibliography for this conference proceeding formatted accordingly:

2005-06-15

E:\FM-course\handout_70\EndNote.fm