1

Utility FM+EN
User guide

Overview of version 3.0

EndNote is a widely used tool for creating bibliographies. This product does however, not support FrameMaker. The utility **FM+EN** bridges this gap by:

- Inserting temporary citations with **CTRL+y**
- Replacing temporary citations by formatted citations in FM documents and FM books.
- Temporary citations may be expanded to bibliographic references. Most likely these are in footnotes.

FM+EN controls the collaboration of the following programs:

- FrameMaker (versions 6...8, de/en)
- MS Word (versions2000...2003, de/en) [1]
- EndNote (versions 8...11, en only).

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1   Word 2007 has a completely different menu system and can not be handled.

Contents

Bibliography with 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 is available for Windows and Mac OS. It is well integrated with MS Word but not with FrameMaker.

Cooperation with FrameMaker

Advantages using EndNote

Although bibliographies can easily be created in FrameMaker by means of cross references, EndNote provides the following 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).

Using EndNote's RTF scan facility

It may seem reasonable to export the FrameMaker document as RTF, then scan and modify it by EndNote and finally import the RTF again into FrameMaker. However, s*ome* problems are:

- Anchored frames get new attributes (at insertion) with all previous content as one image.
- Layout and formats must be re-applied.
- Cross references become useless, must be rebuilt.

Solution with D+DD utility

D+DD has developed the utility **FM+EN** which controls the collaboration between FrameMaker, Word and EndNote. A special paste command manipulates the temporary citation. For FM < 8 this implies code conversion (Unicode ➜ FM).

An intermediate RTF file contains only the data concerning the bibliography and not the complete FM document.

Of course, nothing is perfect – **FM+EN** may not satisfy your demand. See *Setting up the utility* on page 11.

Forms of citations handled

Any form of temporary citation (copied from EndNote) can be handled by the current version of **FM+EN**, for example, the following:

Characteristic	Example
Simple form	[[Müller, 1925 #13]]
With page range	[[Neuman, 2003 #653, p. 53-54]]
Combined citations	[[Shone, 1998 #222; Rogers, 2003 #551; UNWTO, 2006 #608]]
Special symbols in author names	[[Wisconsin Dept. of Health & Family Services, 2004 #614]] [[Barnes-Ellerbe, 2004 #290]]

2008-09-23

O:\[E]_DDDprojects\FM+EN\Documentation\fm+en-docu.fm

Process overview

The utility **FM+EN** controls the data flow between the three involved programs:
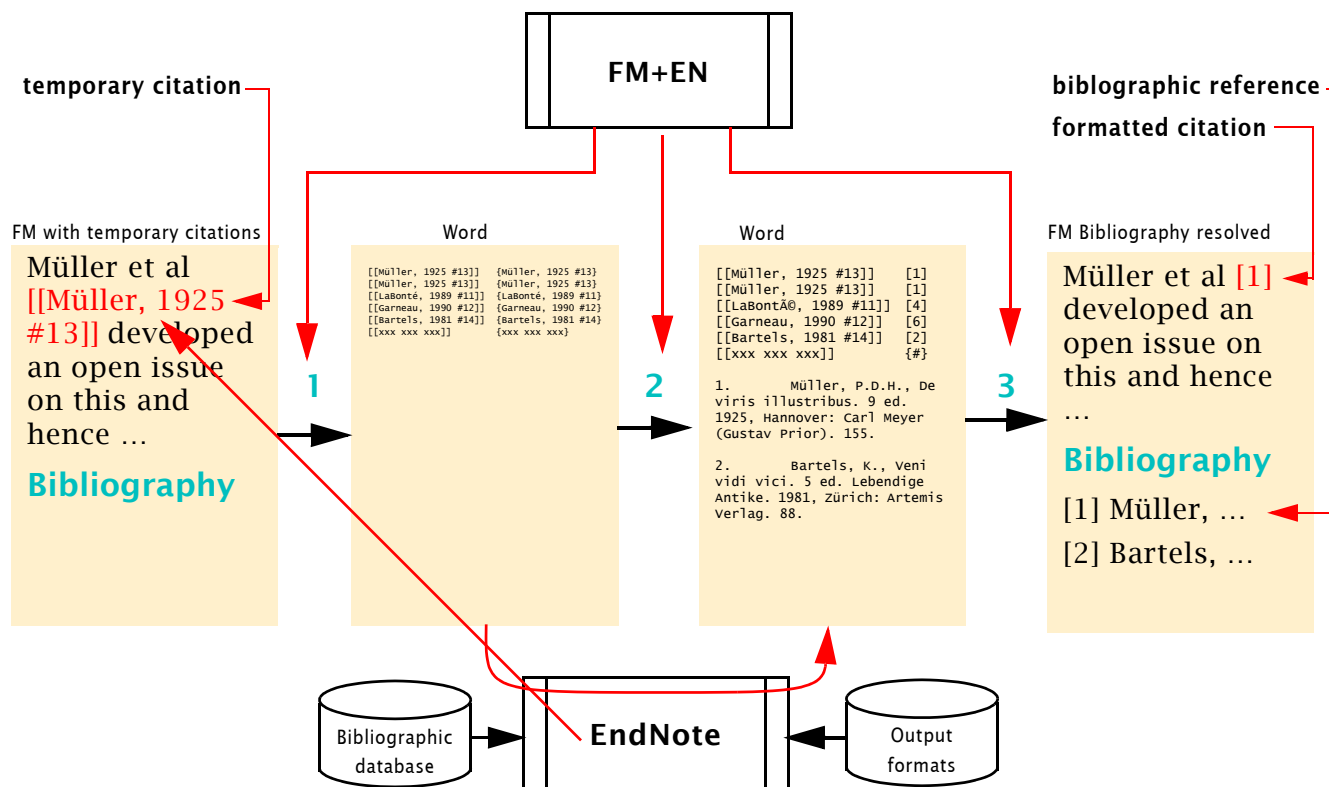
Process details

During the text development temporary citations are copied from EndNote and pasted into the FrameMaker document. However, not **CTRL+v** is used for pasting, but the new command **CTRL+y** provided by **FM+EN**. This command modifies the temporary references for this process.

Note: *Save your document before starting* **FM+EN**. *You can not UnDo[2] the replacement of the temporary citations performed in step 3. But since* **FM+EN** *does not save the processed file you may «revert to saved» for undoing all actions of* **FM+EN**.

Step 1 The temporary citations are collected in FrameMaker and written into an MS Word file. Two forms are written to avoid problems during resolving the references in EndNote:

- The bracketed form which is present in FrameMaker, for example [[Müller, 1925 #13]]

- The form with braces for EndNote to resolve the reference, for example {Müller, 1925 #13}. This is called the EN-form.

    [[Müller, 1925 #13]]   {Müller, 1925 #13}¶

Step 2 **EndNote** scans this Word file (in rtf = Rich Text Format) based on the current bibliographic database and the selected output format. The result is a new rtf file containing both the formatted citations and the generated bibliography.

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2 Well, in FM 8 and above you have more than 1 Undo step, but some 100 Undo's might still be impossible.

Step 3   The first part of the `rtf` file from step 3 now contains format-
ted citations to the right according to the output format
selected in EndNote:

Numbered formats   The right part now contains the formatted citations

```
[[Müller, 1925 #13]]              [1]
[[Bartels, 1981 #14]]            [2]
[[xxx xxx xxx]]                  {#}
```

The second part of the new file contains the generated bibli-
ography:

```
1.    Müller, P.D.H., De viris illustribus. 9 ed. 1925…
2.    Bartels, K., Veni vidi vici. 5 ed. Lebendige…
```

Author-Date formats   Author-date formats do not contain a simple 1:1 relationship
between the formatted citation and the bibliographic refer-
ence:

```
[[Müller, 1925 #13]]              (Müller 1925)
[[Bartels, 1981 #14]]            (Bartels 1981)

Bartels, K. (1981). Veni vidi vici. Zürich, Artemis
      Verlag.
Müller, P. D. H. (1925). De viris illustribus.
      Hannover, Carl Meyer (Gustav Prior).
```

Further processing by **FM+EN**   With this data the temporary citations in the FrameMaker file
are searched and replaced by the formatted EN-form.

The user must copy the bibliography to an appropriate place
in the FrameMaker document or book and format it.

Note: *You must use **Paste Special** and select* RTF *to maintain the
local character formatting from Word.*

Note: *The author recommends you to save the processed FM docu-
ments in a different directory (including the book file). This
allows you to continue your textural work with files containing
the temporary citations. This is also a safeguard against prob-
lems with the utility – which unfortunately can not be avoided
completely.*

Specialities and restrictions

Although **FM+EN** v3.0 handles citations in UTF-8 format, it does not handle files with UTF-8 file names (e.g. Пушкйн.fm)

EndNote output formats

1 **FM+EN** v3.0 can not work with EndNote output formats which replace the temporary citations with nothing. Some formats of this type are: Footnotes (EN 8), Amer Literature and GPA Verlag. Check your particular format for the property **Citations > Templates**. This must not be empty. If it is empty, fill in [Bibliography Number].

2 Output formats with inline formatting. These are only handled for references in footnotes. A citation currently can *not* receive special formatting such as superscripting.

Collecting temporary citations

Temporary citations are collected and expanded in these places:

- Standard text flow
- Footnotes
- Table title, heading, cells (for table footnotes see *Mixing citations in text and in footnotes* on page 7; it may be resolved, if it can be resolved in the text elsewhere)
- Cross references. The citation is not expanded by **FM+EN**, but by the update of the reference.

Temporary citations are *not found* in the following places:

- Text frames within anchored frames.
- Text lines

Note: *The reason for the latter two restrictions is the termination of the search loop by a stop code at the end of the text flow. Text-frames and text lines in anchored frames are searched after the text flows and hence can not be found by the automatic process – although you can find them by a manually invoked search.*

Author names with quotes

Although it is not typographically correct, you may use the following quote characters in names:
Apostrophe (x27): D'Alembert; accent grave (x60): D`Alembert; accent acute (xB4): D´Alembert.
The correct character would be the single right quotation mark (x92): D'Alembert. Hawaiian names may contain a correct single left quote (x91): Kahoʻolawe.

All of these forms are handled correctly by **FM+EN**.

Note: *Be aware of the FM setting Smart quotes in Format > Document > Text options. Do not type over the inserted apostrophes!*

Mixing citations in text and in footnotes

You may have citations in paragraph text and in other paragraphs in footnotes which contain the citations. However, when mixing inline citations with citations in footnotes within one paragraph, two cases are to be distinguished:

Inline citations before footnote citations	Inline citations after footnote citations
In paragraphs where the inline citations are first [[World Health Organisation, 2003 #37]], the citations in footnotes[a] are not handled, because the footnote text is not visible in the copy/paste buffer.	In this paragraph the first two citations are put into footnotes [b] and this one[c] and inline citation(s) follow: [[Matějček, 2006 #27]]. This arrangement is treated correctly by FM+EN.
Citations in footnotes are **not** handled.	Citations in footnotes are handled.

a. [[Þornbjørn, 1793 #30]]
b. [[Barnes-Ellerbe, 2004 #48]]
c. [[O'Brien, 2005 #49]]

Restrictions in FrameMaker < 8

FrameMaker until version 7.2 uses an internal code page, which is not even sufficient for all Western European languages, not to speak of Central European languages. **EndNote** on the other hand uses Unicode in its database since version 8. Hence for FrameMaker 7 documents **FM+EN** must perform code conversions during the copy and paste processes.

It is easy to understand that the method used in **FM+EN** can not handle citations and references with none-latin scripts:

Inserted temporary citation	What was intended
`[[Îšî'Ïï„Î¬Îºî'Ï,, #28]]`	[[Κιρτακις, #28]]
`[[ÐŸÑƒÑˆ°Ð'Ð½, 1823 #29]]`	[[Пушкйн, 1823 #29]]

Even for the latin script the process can not handle characters outside of the character repertoire of FrameMaker, such as Z caron (Žž) or the character eng (Ŋŋ) used in Sami languages.

In the temporary citations only author names with characters built from the FM character set can be handled or displayed correctly. Therefore you can only use latin transliterated names in your bibliographic data base (Kirtakis or Pushkin for the above mentioned).

Some characters not recognised as such by FrameMaker

FrameMaker < 8 does not recognise the following characters as such in **Find** with Wildcard ? or *. In contrast, they are recognised as punctuation:

Đ (Latin Capital Letter Eth); ð (Latin Small Letter Eth); Þ (Latin Capital Letter Thorn); þ (Latin Small Letter Thorn); Š (Latin Capital Letter S With Caron); š (Latin Small Letter S With Caron); Ý (Latin Capital Letter Y With Acute); ý (Latin Small Letter Y With Acute).

This is not a problem for **FM+EN** v3.0, because citations are searched within the utility and not be means of FM functions.

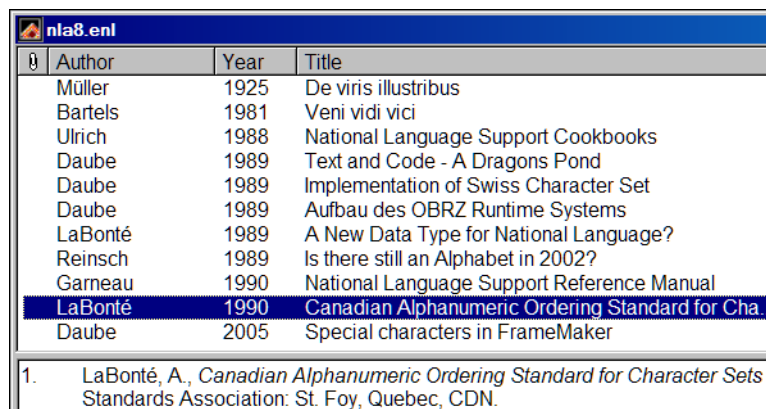2008-09-23

Setting up EndNote

The **FM+EN** process assumes a certain setup of **EndNote**:

In EndNote (**Preferences > Temporary Citations**) assure curly braces for Citation Markers to handle the short citations.
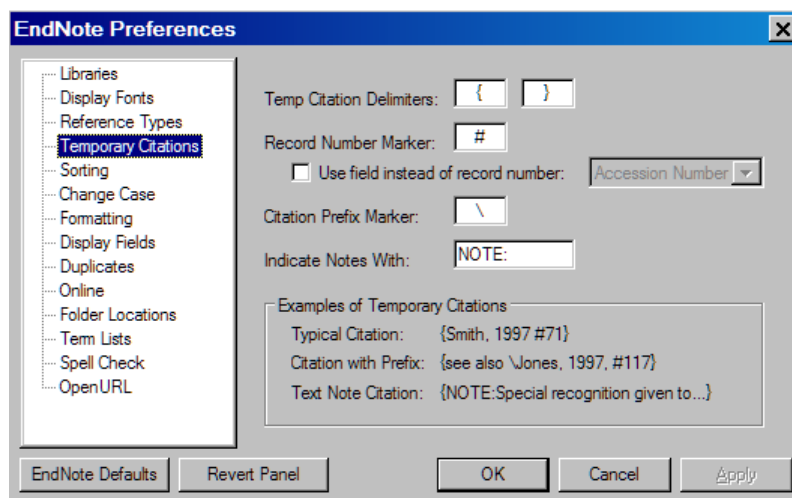
Define the reference data base in EndNote

You may specify the reference data base with **File > Open** before you start **FM+EN** or on demand of the utility.

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

Specifying the output format

You may specify the output format (e.g. Numbered or IEEE) before you start **FM+EN** or on demand of the utility.

When producing numbered output, the initial number is set to the value from the Program setup of **FM+EN**.
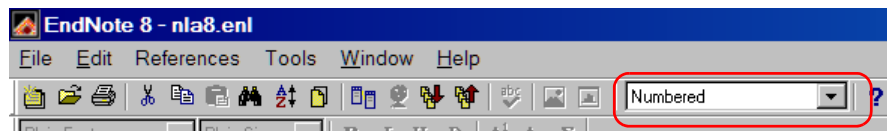
Output format for references in footnotes

If you want to replace the temporary citations in the text (most like in footnotes) by the fully formatted references, you will need a special output format. See *Expanding temporary citations* on page 18 for details.

Utility FM+EN

The utility either handles an individual FM document or all documents of a FM book. To handle independent FM documents (they may belong to any or no book), start **FM+EN** in the first of these documents, then in the next, etc.

You can, however insert temporary citations into an arbitrary number of FM documents concurrently.

Operating the utility

Right clicking on **FM+EN** icon in the system tray opens the following menu:

<u>S</u>uspend Hotkeys	<u>S</u>uspend Hotkeys
<u>P</u>ause Script	<u>P</u>ause Script
E<u>x</u>it	E<u>x</u>it
Program setup	Program setup
Check file(s) for illegal character x0D	Check file(s) for illegal character x0D
1 Collect temporary citations in FM	Format Citations and build Bibliography
2 Scan RTF in EndNote (create bibliography)	Documentation
3 Replace temporary citations in FM	About
Run ALL THREE steps in sequence	
Documentation	
About	

The left picture displays the long menu, the right picture displays the short menu (see *FM+EN.ini* on page 21). The author recommends to use the long menu providing individual steps.

Program Setup : This must be done before you use "Format Citations …". This step defines your environment. See *Setting up the utility* on page 11 for the details.

Check file(s) … : Check the file or all files in the book for illegal character x0D. See more details at *Checking the files* on page 13.

Format Citations… : The three steps of the process are run in sequence. Follow the instructions provided by popup-messages. See more details at *Creating the bibliography* on page 14. In single-step mode this menu item displays as Run ALL THREE steps in sequence.

Documentation : Display the PDF with this information.

About : Provides a panel with program information and a disclaimer.

Suspend Hotkeys : If for any reason you need in an application the key **CTRL+y** you can suspend the key function from **FM+EN** and later re-activate it.

Pause Script : Instead of selecting from the menu use the **PAUSE** key. The first press of **PAUSE** halts the script. The program icon becomes 🅗. Resume the script with an additional key press.

While **FM+EN** is paused, you may operate other programs. Before you resume **FM+EN** you must – and this is essential – re-establish the state (active/inactive) of the involved windows (FrameMaker, Find/Replace, Word, EndNote).

Exit : Close **FM+EN**. You may use the **BREAK** key (**CTRL+PAUSE**) for this. Press it not too shortly.

If you exit **FM+EN** before is has finished its task *close the open files without saving* in FrameMaker and Word.
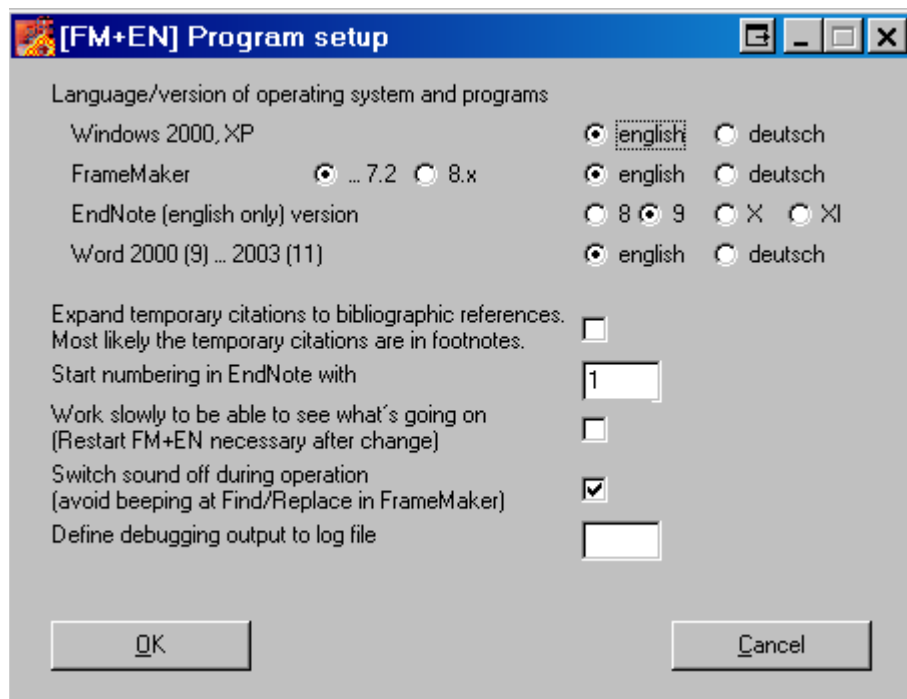
Restrictions when running FM+EN

During the operation of **FM+EN** (except when the utility is just used to insert temporary citations) observe the following:

Generally

- Do not run your machine on battery - plug it in to mains.

- Any program which automatically starts (for example, backup, automatic Windows Update) may change the focus and hence may create unpredictable results.

- Do not click or type during the operation of **FM+EN**. This will change the focus (active window) and interfere with the simulated keystrokes.

- Answer only to dialogues from **FM+EN**. The window title of these start with **[FM+EN]**.

In FrameMaker

- Book names and document names must not contain a] symbol. This could interfere with the detection of tile types by **FM+EN**.

- Switch off automatic update of FM (**Help > Updates**…). You will need to run through an update request until you can switch off automatic updating in the Update Preferences!

- Switch off the display of graphics in your FM document or for all documents in the book (**View > Options**). Loading and displaying graphics may take to much time for proper synchronisation of the programs involved.

- Close all palettes (Tools, ¶-catalogue, *f*-catalogue, Equation-palette, …)

In Word

- In Word switch off the Office Clipboard to avoid interference.

Note: *Of course, you can open the menu of* **FM+EN** *during its operation with a right-click and you can use the keys* **PAUSE** *and* **BREAK***.*

Setting up the utility

It is essential to define the proper versions and UI languages of all involved programs including the operating system, before you execute one of the relevant process steps.

[FM+EN] Program setup

Language/version of operating system and programs

Windows 2000, XP		⦿ english ○ deutsch
FrameMaker	⦿ ... 7.2 ○ 8.x	⦿ english ○ deutsch
EndNote (english only) version		○ 8 ⦿ 9 ○ X ○ XI
Word 2000 (9) ... 2003 (11)		⦿ english ○ deutsch

Expand temporary citations to bibliographic references. ☐
Most likely the temporary citations are in footnotes.

Start numbering in EndNote with   `1`

Work slowly to be able to see what´s going on ☐
(Restart FM+EN necessary after change)

Switch sound off during operation ☑
(avoid beeping at Find/Replace in FrameMaker)

Define debugging output to log file   ⬚

[OK]   [Cancel]

Expand temporary citations... — Check this box if the temporary citations in FrameMaker are to be expanded to bibliographic references (most likely in footnotes) and should not just be converted to ordinary citations according to the output format.

See *Expanding temporary citations* on page 18 for details.

Start EndNote Numbering ... — Set a starting value other than 1 only for special circumstances. See also *Adding bibliography incrementally* on page 17.

Work slowly ... — If you want to observe **FM+EN** during its work, check the appropriate box. This increases the time between the automatically sent keystrokes.

Note: *Use this feature only for files with few citations.*

Switch sound off ... — Check this box to avoid the beeps from the find/change dialogue in FrameMaker. This beeping can be very annoying when handling many citations.

At the end of **FM+EN** this property is reset to the user's setting.

Cancelling the utility

Safely cancel the current process step of **FM+EN** at the dialogues which provide a **Cancel** button.

To exit (close) **FM+EN** select **Exit** from its menu.

To exit **FM+EN** during execution of a process step, press the **BREAK** key (**CTRL+PAUSE**) not to shortly.

Note: *You may need to press the **BREAK** key more than once.*

A popup message will inform you that **FM+EN** will terminate. Now do not save the FM document, as it is only partially processed. **Revert to saved** instead.

System properties altered

Display of file extensions

To be able to distinguish ordinary documents (`.fm`) from FrameMaker books (`.book`) as well as Rich Text documents (`.rtf`) from standard documents (`.doc`) **FM+EN** requires the display of file extensions.

Since many Windows installations hide the file extensions (Windows installation default), this property must be switched on in the registry. At the end of **FM+EN** this property is reset to the user's setting.

Sound setting

To avoid annoying beeps, you can set the sound during the utility to OFF. At ordinary termination of the utility the sound level will restored.

However in some rare cases the sound is left OFF.

Checking the files

FM+EN can will not work correctly if illegal characters – namely the infamous x\0d aka `Carriage Return` appears in the file.

Source of error An error in the import filter(s) for RTF (Rich Text Format) does not strip out these characters correctly in FM 7. Even if you are certain that you did not import any MS Word files you are recommend to check the files before you run the main procedure of the utility.

Use utility to check files

In the menu of the utility (see *Operating the utility* on page 1-9) select item **Check file(s) for**...

- If you start in a book, all files of the book are checked. Hence these files should not create any open errors (such as "font missing") or be open already.

- If you start in a distinct document, only this file will be checked.

At the occurrence of the first illegal character the following message will appear:
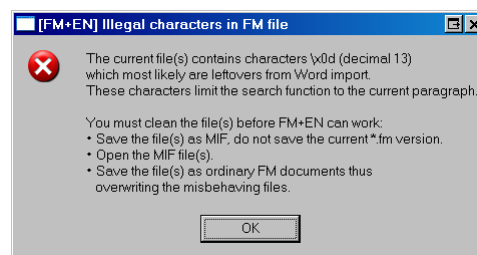
To eliminate the illegal character, follow the procedure in the message.

Note: *You can not eliminate the found characters \x0d with **Change** and an empty Change field. It will not be removed from the file! It can only be removed with the MIF method presented in the message.*

In case the file (or files in a book) are OK, a confirming message appears:
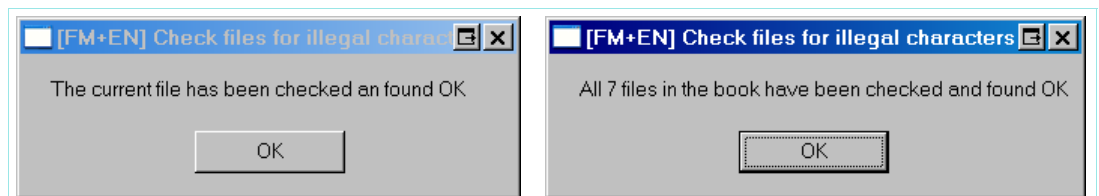
Creating the bibliography

Start the utility **FM+EN**. You will get an icon in the system tray. For the insertion of the temporary citations **FM+EN** provides the "hot key" **CTRL+y** for the special paste.

Inserting a citation

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

| Daube | 1989 | Implementation of Swiss Character Set |
Daube	1989	Aufbau des OBRZ Runtime Systems
LaBonté	1989	A New Data Type for National Language?
Reinsch	1989	Is there still an Alphabet in 2002?
Garneau	1990	National Language Support Reference Manual

Note: *You may select multiple entries to combine citations.* **FM+EN** *can handle these also* [3].

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+y**). The inserted temporary citation has the format `[[LaBonté, 1989 #11]]`.

Note: *For pasting the same temporary citation a second (or more) time use* **CTRL+v** *(further CTRL+Y will add more [[ ]]).*

Format citations and build bibliography

After starting from the menu **FM+EN** reminds you about the essential circumstances mentioned in *Restrictions when running FM+EN* on page 10
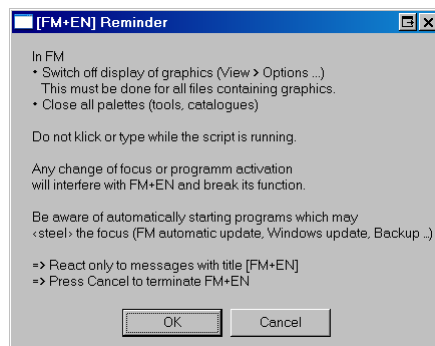
Step 1

The word template is opened and then switched to FrameMaker where the **Find/Change** dialogue is opened and prepared.

Then the temporary citations are searched in the FM document:

▪   The whole document is selected and copied to the clipboard.

▪   The utility searches for citations in the clipboard buffer.

▪   Found temp. citations are written to the Word document in two forms.

---

3   In **EndNote** it is possible to select more than one entry with CTRL+click. Pasting into FM this results in a combined citation such as `[[Ba],  2001 #642; Neuman, 2003 #653, p. 22-23]]`. The number of forms is unlimited: with(out) page number or page range, number of selections.
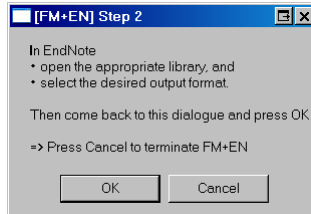
- The Word document is saved in RTF format and then it is closed.

When the step has been finished, a ToolTip appears at the **FM+EN** icon in the system tray for some seconds.

Step 2

In this step **EndNote** comes into play and it must be prepared:

EndNote works on the generated Word file and creates a new one which is saved with a name containing the output format:

`fm-biblio.rtf` ➜ `fm-biblio-Numbered.rtf`

When the step has been finished, a ToolTip appears at the **FM+EN** icon in the system tray.

Step 3

In this step the modified Word document is opened and in FrameMaker the temporary citations are replaced by the formatted citations (or to formatted references).
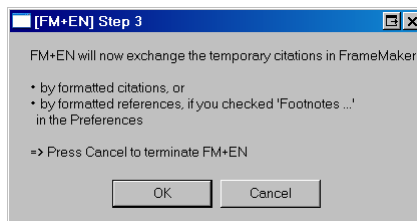
This step starts with the automatic setup of the **Find/Change** dialogue in FrameMaker:
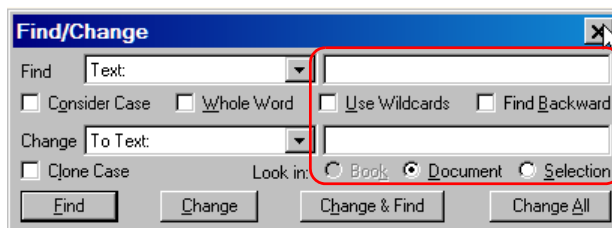
When the step has been finished, a ToolTip appears at the **FM+EN** icon in the system tray.

To avoid superfluous replacements of already handled citations, the Word file is cleaned out successively and finally will contain only the stop code and the formatted bibliography.

Final Work

The completion of the process is displayed by the following dialogues which reminds you about the final work to be done.

Note: **EndNote** *applies* local formatting *to the text (not Character formats) and puts the numbering in the text. For different formatting (e.g. automatic numbering by FrameMaker) you need to edit the text in FrameMaker.*
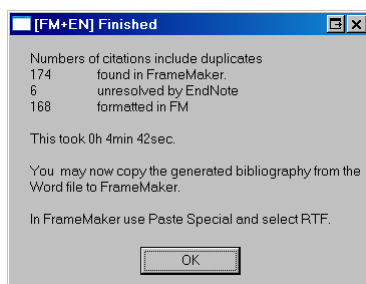
Temporary citations replaced by formatted citations

The number of found and formatted citations include duplicate items Unresolved citations count only the number of different citations.

```
[FM+EN] Finished

Numbers of citations include duplicates
174      found in FrameMaker.
6        unresolved by EndNote
168      formatted in FM

This took 0h 4min 42sec.

You may now copy the generated bibliography from the
Word file to FrameMaker.

In FrameMaker use Paste Special and select RTF.

                  [ OK ]
```
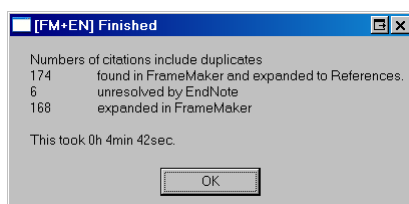
Copy the generated bibliography from Word to the appropriate place in FrameMaker. Use **Paste Special** with **RTF** to keep the formatting from EndNote. Apply your ¶ format, but be careful with applying character formats.

1. Bartels, K., *Veni vidi vici*. 5 ed. Lebendige Antike. 1981, Zürich: Artemis Verlag. 88.

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

EndNote is left open. You may wish to close it.

Temporary citations expanded to references

The number of reported citations include duplicate items.

```
[FM+EN] Finished

Numbers of citations include duplicates
174      found in FrameMaker and expanded to References.
6        unresolved by EndNote
168      expanded in FrameMaker

This took 0h 4min 42sec.

                  [ OK ]
```

FM+EN has done all work for you. Hence Word is already closed.

EndNote is left open. You may wish to close it.

Exiting FM+EN

Clicking the **OK** button on the **Finish** messages terminates the utility and the message displayed below will pop up twice.

Selecting **Exit** from the menu also terminates the program. The following dialogue will shortly pop up once.:

```
[FM+EN]                    [X]

 (i)   Terminating due to [Menu]

          [ OK ]
```
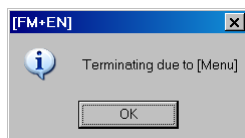
Timing

The processing may seem slow, but an acceleration is not possible to keep the various things in sync. There are special halts (few seconds) built in to provide certain functions (e.g. open file) enough time for completion.

On the other side, some optimisation was possible for version 3:

- Handle all temporary citations of one FM paragraph internally.

- Remove duplicates from the formatted citations before replacing the temporary citations in FM.

Adding bibliography incrementally

When extending the document after inserting the bibliography you might need to sort in the added bibliography paragraphs manually and also adapt any numbering.

Therefore you are recommended to keep the file(s) with temporary citations and use the file(s) with the formatted references only to create an intermediate (or final) "state of the work".

Bibliography in a FrameMaker book

If **FM+EN** is started in a FrameMaker book, it automatically collects and changes the citations in all files of the book.

1 Open all files of the book and handle messages concerning "missing fonts", "missing graphics" etc. accordingly.

You open all files in a book by pressing **SHIFT** while you select menu **File > Open all Files in Book…**.

2 Close all files before you start **FM+EN**, although **FM+EN** will open them again! This is necessary for a clear start situation.

Note: *To assure this procedure* **FM+EN** *gives you the opportunity for verification with the following message:*
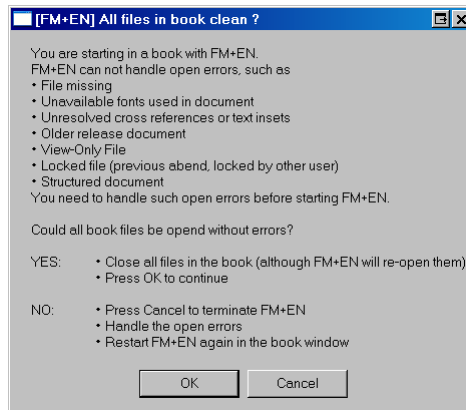
3 The document windows will be maximised to get correct window titles and one file after the other will be opened.

4 **FM+EN** continues analogous to a single file.

Note: *If the last file of a book is also used at another place, then only the files up to this will be processed. This arrangement is not possible with FrameMaker menu positions – with other means it is possible – and I have really seen such book constructs …*

Improper book structure:

preface.fm	
introduction.fm	
conclusion.fm	same file as the last in the book
methodology.fm	
findings.fm	these files will not be processed
…	
conclusion.fm	last file
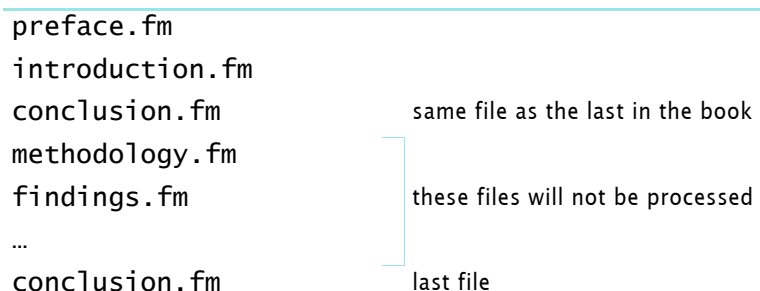
Expanding temporary citations

A special form of bibliography places the bibliographic references in footnotes[4]. In this case, the citation in the text is just the footnote reference as here[5]. For example:

Before processing	Hecate est Iovis et Latonae filia, soror Apollinis [1]. Est tricopor et triceps, magicarum artium magistra ac fascinationum praeses, cinctra latrantium canum turma [2]; noctu stans in triviis vel prope sepulcra et ubi loca sunt.
	1 [[LaBonté, 1989 #11]] 2 [[Garneau, 1990 #12]]
After processing	Hecate est Iovis et Latonae filia, soror Apollinis [1]. Est tricopor et triceps, magicarum artium magistra ac fascinationum praeses, cinctra latrantium canum turma [2]; noctu stans in triviis vel prope sepulcra et ubi loca sunt.
	1 LaBonté, A. *A New Data Type for National Language?* in *SEAS Anniversary Meeting.* 1989. Amsterdam, The Netherlands: SHARE European Association. 2 Garneau, D., ed. *National Language Support Reference Manual.* January 10, 1990 ed. National language Information Design Guide, ed. IBM. Vol. 2. 1990, IBM National Language Technical Centre: Toronto, CDN.

To achieve this, the following steps are required:

1 For each reference you create a footnote and insert the temporary citation in the footnote.

2 In the Setup of **FM+EN** activate the check box **Expand temporary citations** … (see *Setting up the utility* on page 11).

3 In **EndNote** define the output format `_FM+EN-expanding`. See hereafter for the procedure.

4 Now start the processing in **FM+EN**.

Reference output format

To convert citations into references, **FM+EN** expects the **EndNote** output format `_FM+EN-expanding` (the underscore at the beginning of the name is essential). This must be created as follows:

1 Create a copy of your favourite output format and save it with the name `_FM+EN-expanding`.

2 Edit the format to get the following properties:

Citations > Templates:	`[Bibliography Number]` (The brackets are essential)
Bibliography > Layout:	`Bibliography Number.`➔ (➔ is the TAB-field. Do not forget the period)

3 Save the modified output format `_FM+EN-expanding.`

4   They may, however, also appear in the text or as side notes.
5   See also *Expanded citations, second method* on page 1-19

Successive similar references

You may have the same reference on one page in succession. Before You start **FM+EN** you should replace the second to last same reference by the word ibid[6]:

48.[[Müller, 1925 #13]]   →   48.[[Müller, 1925 #13]]
49.[[Müller, 1925 #13]]   49.ibid
50.[[LaBonté, 1989 #11]]   50.[[LaBonté, 1989 #11]]

Then this reference will not be resolved by the process - as it is just ordinary text:

48. Müller, P.D.H., *De viris illustribus.* 9 ed. 1925, Hannover: Carl Meyer (Gustav Prior). 155.
49. ibid.
50. LaBonté, A. *A New Data Type for National Language?* in *SEAS Anniversary Meeting.* 1989. Amsterdam, The Netherlands: SHARE European Association.

Final work

Since Footnotes in FrameMaker may end up on the following page of their reference, the ibid may be placed wrongly. Hence you need to check this and probably replace some ibid by the original citations, which you will find in the footnote before the one with the ibid.

Expanded citations, second method

If you know right from the beginning that this is the format of choice, you may use a simple copy and paste from **EndNote**. The format of the references must be set in **EndNote** output format drop down list.

Since the footnotes themselves are numbered you should use an output format not containing numbering, such as (in the examples here) Academic Management Review.

For best appearance you may need to set up an own output format which fits to your FM document appearance (see *Reference output format* on page 1-18)

To insert the bibliographic reference:

1 Place a footnote reference in your text like this [7].

2 In **EndNote** find the desired bibliographic reference.

3 With **CTRL+k** copy the reference to the clipboard.

4 In the footnote (see bottom of page) paste the text from the clipboard.

Note: *Depending on your settings in* maker.ini *for* ClipboardFormatsPriorities *you will either use ordinary paste (**CTRL+v**) or paste special (with RTF) by **SHIFT+CTRL+v** get the formatted text or the unformatted text as with this footnote[8].*

---

6 The word *ibid* stands for *ibidem* (aforementioned)
7 **Müller, P. D. H. 1925. *De viris illustribus* (9 ed.). Hannover: Carl Meyer (Gustav Prior).**
8 Müller, P. D. H. 1925. De viris illustribus (9 ed.). Hannover: Carl Meyer (Gustav Prior).

Background information

FrameMaker 8 fully supports a subset of Unicode and hence supports nearly any language with left-to-right script. The correct glyphs are only visible if an appropriate font is used for the text[9].

Searching for temporary citations

Due to the very limited 'wildcard search' in FrameMaker, which is not sufficient to search for real patterns (as with Regular Expressions), **FM+EN** up to version 2.5 could only find and process a limited number of citation formats.

Starting with **FM+EN** v3.0 a new method is used which does not impose any restriction to the contents of the citations:

If a 'start citation' sequence ([[) is found, the text of the current paragraph is processed inside of **FM+EN** to find the citation(s). See *Mixing citations in text and in footnotes* on page 7 for consequences of this method.

EndNote and FrameMaker

Starting with **EndNote** version 8 the database used Unicode. I have not tested **FM+EN** 3.0 with older **EndNote** versions.

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

EndNote Version	Handling none-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 support	++++	+
9 (2005)	Same as for EN 8	++++	+
X (2006)	Slight difference in menu names to EN 8	++++	+

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.

Installation

FM+EN is provided in a ZIP archive which you expand into any directory of your liking. The expanded data structure contains a sub directory TestFiles with appropriate content.

You may wish to create a shortcut on your desktop to the program (fm+en.exe).

---

9   If your bibliographic references only use 'western' languages, nearly any TrueType or OpenType font is OK.

FM+EN.ini

The file fm+en.ini keeps information needed to run the processing steps individually. Also some information to influence the behaviour of the utility is kept here.

Please edit this file *only on request of the author* or with sufficient knowledge of the effects.

Content of FM+EN.ini (example)

```
[FM+EN]
; For version number see menu About
; Manually change this file only on advice of D+DD
; --------------------- template
rtfTemplate    = FM+EN.doc
; --------------------- temporary storage
rtfSave        = fm-biblio.rtf
formattedFile  = fm-biblio-IEEE.rtf
expandCits     =0
bookActive     =0
numRefs        =11
shortMenu      =0
time1          =69.953000
time2          =14.172000
time3          =88.734000
; --------------------- versions of involved programs
fmVersion      =8
fmLanguage     =en
enVersion      =9
enLanguage     =en
enNumStart     =1
wdLanguage     =en
winLanguage    =en
; --------------------- sound on/off
noBeeps        =1
sound          =7.994202
; --------------------- timing values for 3Mhz machine
keyDelay       =0
; keydelaytime for keyDelay=1
delayTime      = 150
sleepTime      = 300
; sleepTimeLong = 4*sleepTime
x0dTime        =10
; --------------------- debugging
debugging      =
```

Explanation

FM+EN.doc	Template for collecting the citations. If this file has been destroyed, it may be copied from FM+EN.saved.doc
expandCits	=1 if citations are to be expanded
bookActive	=1 if work starts in an FM book
shortMenu	=1 hides the individual steps in the menu. =0 reveals all steps in the menu
x0dtime	Time for one file in a book to check for illegal characters

Why an external program

FM+EN is a program external to FrameMaker and not a plug-in, because a script would need the script interpreter and I do not have the capacity to program plug-ins which require C.

Help – it does not work!

It is quite difficult to time a program from the outside. Hence it may occur that **FM+EN** does not behave. Some of these problems disappear with a restart of the utility, some call for more investigation.

Essential preconditions

Do not forget to check all the constraints listed in *Restrictions when running FM+EN* on page 10. Not observing these *will* create problems.

Run process steps individually

To ease problem handling the process steps can be run individually. Set `shortMenu =0` in the `FM+EN.ini` file for this purpose (see *FM+EN.ini* on page 21).

Running the same process step repeatedly requires that you re-establish the mandatory initial state:

For step 1 (collecting citations)

`Revert to Saved` all the involved FrameMaker files. Be aware that their opening must not create any errors such as *Font not found*. Switch off graphics display for all files.

Close Word *without saving* anything.

For step 2 (formatting citations in EndNote)

EndNote must be started and the proper library be open. Also the desired output format must be selected.

Word need not to be started, but can be (*no document open*).

For step 3 (replace temp. citations in FM)

The FM file or all book files must be open. In case of a book the active window must be the *maximised* book window. At the end of this step the files are not saved by **FM+EN**. If something went wrong, you may close them *without saving*.

It would be good practice to save the modified FM documents (including the book file) in a new directory. See *Adding bibliography incrementally* on page 17

Word need not to be started for step 3, but can be (with no document open). At the end of this step, *do not save* the altered Word document to be able to repeat this process step.

Slow down processing

In case of more problems it may help to run the utility slowly by activating the check box **Work slowly** in the Program setup.

Known issues

FM menues pop up in first step

In rare cases it happens that keystrokes sent to FrameMaker are not received correctly (for example CTRL is spilled). Something will be typed or a menu item may pop up

Note: *Although most functions are now initated with alternative keystroke sequences, the problem may reappear.*

Restart the process

Stop the utility (see *Exit* on page 9) and close all open FM files *without saving*. Then start **FM+EN** again.

First line in Word file does not contain a temporary citation

Especially at the first start of **FM+EN** (after a Windows start) Windows may provide surprises: The Word file with the collected temporary citations does not build up as expected.

Note: *With the new method of collecting the citations and pasting them all at once to Word this error should have disappeared.*

Word file OK | As previously displayed, the file should present a regular pattern of brackets, tabs and braces:

[[Šèšíüš, 1999 #26]]	{Šèšíüš, 1999 #26}
[[DuçanÌsídõrâ, 2006 #24]]	{DuçanÌsídõrâ, 2006 #24}
[[Müller, 1925 #13]]	{Müller, 1925 #13}
[[Fridriksson, 2005 #31]]	{Fridriksson, 2005 #31}

Word file *not* OK | If the first lines are mangled up or do not start with double brackets, such as the following, stop the process and start again.

bp{Müller, 1925 #13}	{Müller, 1925 #13}
[[Šèšíüš, 1999 #26]]	{Šèšíüš, 1999 #26}
[[DuçanÌsídõrâ, 2006 #24]]	{DuçanÌsídõrâ, 2006 #24}

[[Fridriksson, 2005 #31]] [[Šèšíüš, 1999 #26]]	
V	
[[Müller, 1925 #13]]	{Müller, 1925 #13}

{Šèšíüš, 1999 #26} [[DuçanÌsídõrâ, 2006 #24]]	
[[Müller, 1925 #13]]	{Müller, 1925 #13}
[[Fridriksson, 2005 #31]]	{Fridriksson, 2005 #31}

[1] [1]	
[[Müller, 1925 #13]][1]	

Restart the process | To ease your work you may wish to use the long menu to start each process step individually. In case of problems you should restart the whole utility, even to perform step 2 or 3. Necessary data of a previous step is stored in fm+en.ini.

1 Cancel the process by pressing **CTRL+BREAK** not to shortly

1 Close the Word file without saving

2 Revert your FM document(s) to the last saved state

3 Start **FM+EN** again.

FM+EN stops after the first process step

For the second step **EndNote** comes into play.

If nothing happens after the first step, you have forgotten to open **EndNote** and open a database file or the version of **EndNote** defined in the Program Setup is wrong.

1 Select **Exit** in the menu of the utility to cancel it.

2 Close the current FM document(s) without saving it/them.

3 Assure that all other files of the FM book are also closed (if working from a book file)

4 Restart the Utility and set it up correctly as well as **EndNote**.

Secondary monitor

The stop may also happen, if you have EndNote running on a secondary monitor (with or without the other programs running also on the secondary monitor):

1 Select **Exit** in the menu of the utility to cancel it.

2 Close the current FM document without saving it

3 Assure that all other files of the FM book are also closed (if working from a book file)

4 Close EndNote and start it on the primary monitor.

5 Restart the process

FM Tools Palette pops up after second step

On certain machines (with German FM, Word and Windows) I have noticed this:

- The Tools palette pops up.
- The Find/Replace dialogue is not set up correctly.
- Citations are not replaced but deleted.

The reason may be the same as for *FM menues pop up in first step* on page 22.

To save your time you may wish to work with individual process steps (see *Run process steps individually* on page 22).

Generating footnote references does not work correctly

For this process **EndNote** must use the output format _FM+EN-footnotes. This format will be selected by **FM+EN**. The selection will fail, if a format with a name starting with an underscore (_) appears before the entry _FM+EN-footnotes.

Note:

At least until version X (=10) EndNote does not use output format names starting with an _. So this error should not happen.

Nevertheless, Murphy's law may strike. In this case do:

1 Inactivate these formats with **Edit > Output Styles > Open Style Manager** ... (remove the tic mark in the check box). Of course the format _FM+EN-footnotes must be kept active!

2 The irritating format(s) will no longer appear in the list of **Edit > Output Styles**.

3 Select **Exit** in the menu of **FM+EN** to cancel it.

4 Close the current FM document without saving it

5 Assure that all other files of the FM book are also closed (if working from a book file)

6 Restart the process

Switch debugging mode on

To get information about errors or states of the program, at some points in the program messages can be issued.

Do this only on request. The program author may inform you to type something into the last field of the set-up dialogue of the utility (see *Setting up the utility* on page 11).
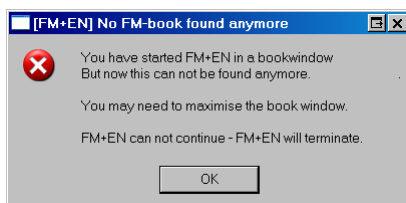
In this mode the user must react to the issued messages to continue operation of the utility.
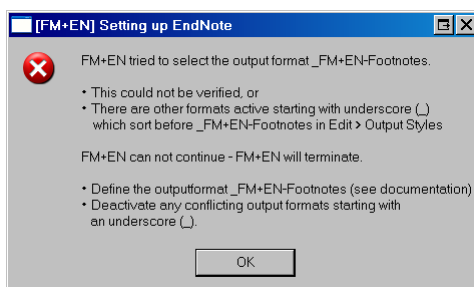
Error messages

Messages from FM+EN

No FM-book found anymore

If the book window is not maximised, the main window does not display the required window title.

[FM+EN] No FM-book found anymore

You have started FM+EN in a bookwindow
But now this can not be found anymore.

You may need to maximise the book window.

FM+EN can not continue - FM+EN will terminate.
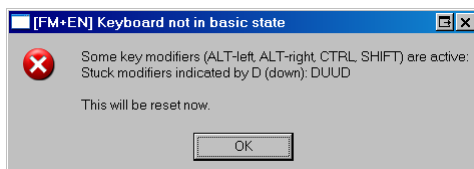
OK

Setting up EndNote

FM+EN needs the output format `_FM+EN-Footnotes` to convert temporary citations in FM footnotes to references. See *Reference output format* on page 18 on how to set up this format.

[FM+EN] Setting up EndNote

FM+EN tried to select the output format _FM+EN-Footnotes.

• This could not be verified, or
• There are other formats active starting with underscore (_)
  which sort before _FM+EN-Footnotes in Edit > Output Styles

FM+EN can not continue - FM+EN will terminate.

• Define the outputformat _FM+EN-Footnotes (see documentation)
• Deactivate any conflicting output formats starting with
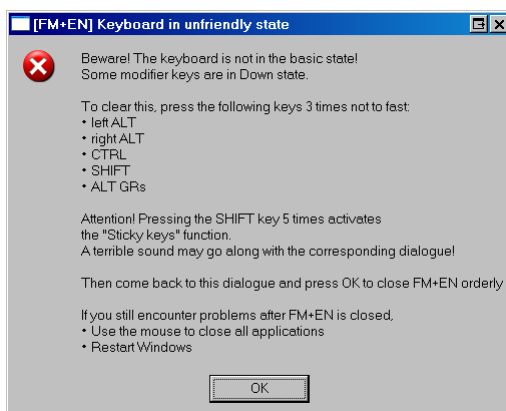 an underscore (_).

OK

Keyboard needs a reset

For proper function the utility needs a plain keyboard state which is checked at the beginning. If the state is not plain a message indicate the necessary reset.

The found state of the left ALT, right ALT, the CTRL and the SHIFT key are indicated either by a U (up, OK) or D (down, not OK). In the picture the left ALT and the SHIFT key are 'down':

[FM+EN] Keyboard not in basic state

Some key modifiers (ALT-left, ALT-right, CTRL, SHIFT) are active:
Stuck modifiers indicated by D (down): DUUD

This will be reset now.

OK

Keyboard in unfriendly state

FM+EN tried to set the keyboard into its basic state[10], but still some modifier keys are in Down state. Follow the instructions of the message. In rare cases it will be necessary to reboot the system:

[FM+EN] Keyboard in unfriendly state

Beware! The keyboard is not in the basic state!
Some modifier keys are in Down state.

To clear this, press the following keys 3 times not to fast:
• left ALT
• right ALT
• CTRL
• SHIFT
• ALT GRs

Attention! Pressing the SHIFT key 5 times activates
the "Sticky keys" function.
A terrible sound may go along with the corresponding dialogue!

Then come back to this dialogue and press OK to close FM+EN orderly

If you still encounter problems after FM+EN is closed,
• Use the mouse to close all applications
• Restart Windows

OK

10 You may have cancelled the program amidst a Send-Key operation. This may include the sending of ALT etc.

2008-09-23

O:\[E]_DDDprojects\FM+EN\Documentation\fm+en-docu.fm

## Superfluous brackets found in citation
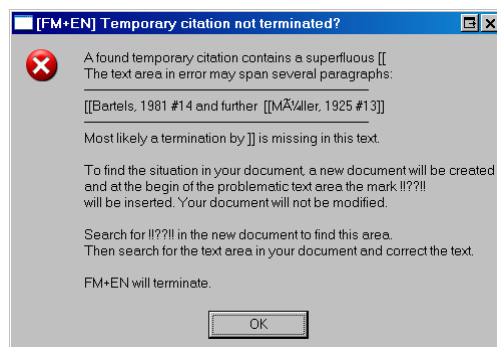
This message appears if inside a citation the start of another one is found:
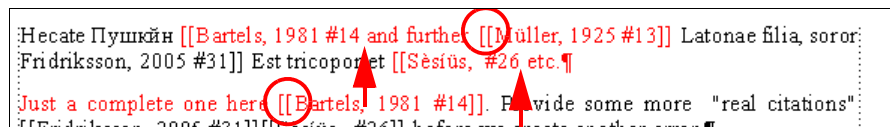
However, the cause normally is a missing closure of a previous citation (see arrows). Since **FM+EN** terminates after the first of these errors, the second case in the above image will not be found at the same run.

To be able to find the location of this error in your document, **FM+EN** creates a temporary FrameMaker document containing the same text as the processed document, but with the indicator !!??!! placed at the beginning of the found citation:
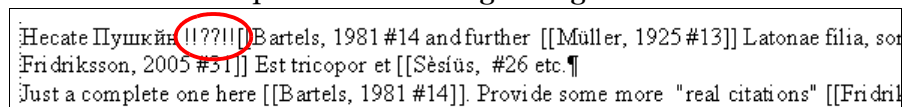

According to the surrounding text you can find the corresponding location in your document and correct the text.

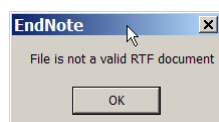*Note:* *Close the generated Word file without saving before you restart the process!*

Messages from EndNote

File is not RTF

The filename to be scanned is written into an **Open** dialogue. In rare cases the file name is distorted (for example, characters lost) as in this example:
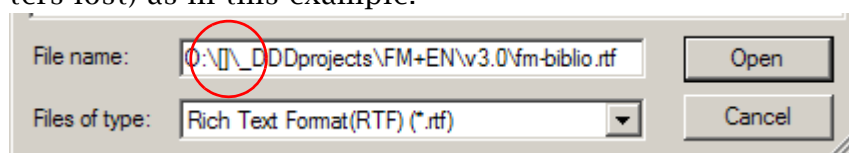
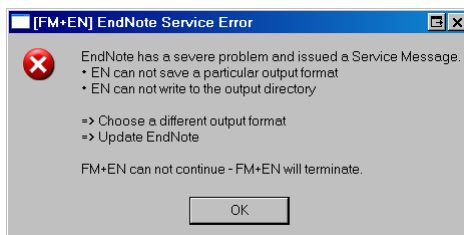In this case **EndNote** stops with this error message:

1 Select **Exit** in the menu of the utility to cancel it.

2 Close the current FM document without saving it

3 Assure that all other files of the FM book are also closed (if working from a book file)

4 Restart the process

Service Error

After scanning the RTF file for citations, this file will be formatted and saved with a new name according to the selected output format.

EndNote may not be able to save the generated RTF file and issues a "Service Error" message. **FM+EN** gets notice of this situation and issues the message:

In my case nothing[11] but a program update (9.0 ➔ 9.0.1) cured the problem.

2008-09-23

O:\[E]_DDDprojects\FM+EN\Documentation\fm+en-docu.fm

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11 http://www.adeptscience.co.uk/kb/article/C86E or
http://www.endnote.com/support/faqs/Install/faq1.asp