

# Using eXtyles with Footnotes and Endnotes

Historically, eXtyles functions have generally not had access to linked Word footnotes and endnotes (referred to collectively here as “notes” unless only one or the other is meant). For that reason, the default behavior was to “unlink” linked Word notes and convert them to plain text when a document was activated. The notes would then be styled using the appropriate Footnote and Endnote paragraph styles, allowing Auto-Redact to run on the note paragraphs and also allowing Citation Matching and associated functions to clean up and match note citations and paragraphs.

Some users elected to retain linked notes on activation, so they could continue to make use of Word’s note functions such as automatic renumbering and repagination. For this workflow, there is an eXtyles function to Convert Footnotes and Endnotes to Plain Text on the Post Processing Cleanup dialog, allowing the notes to be unlinked and converted to plain text ahead of XML export, which could not properly export linked notes to XML.

eXtyles functions have since been developed to handle linked Word notes. In particular, XML Export was modified so that linked notes could be exported successfully to XML.

Today, it is possible to convert plain-text notes back to linked Word notes from the Post Processing Cleanup dialog with the option, Convert plain-text Footnotes and Endnotes to Word Footnotes and Endnotes. With this new function, it is even possible to automatically “round-trip” linked notes to plain text and back again during Auto-Redact and eXtyles Advanced Processes, meaning that these eXtyles functions can have access to note content while preserving their Word properties.

## Limitations to Using Note Conversions

There are some limitations to the way that notes can be set up in the Word document if the function to convert plain-text notes to linked Word notes is to work correctly:

- The document must contain only either footnotes or endnotes, not a mixture of the two.
- All notes must be numbered with Arabic numerals (1, 2, 3, etc.).
- The notes must be placed either at the end of the document or at the end of the document section in which they are cited (see below for information about handling notes on a per-section basis).
- If the notes have been converted to plain text and styled from the Paragraph Styling palette, all notes must contain one and only one paragraph styled with your Footnote

or Endnote paragraph style. Second and subsequent paragraphs must be styled with another style(s) (e.g., a Footnote Continued paragraph)

- Each note must have a matching citation, and vice versa. This can be confirmed by using Citation Matching and resolving any note-related errors.
- The notes must be in ascending numerical order. Note that note conversion can cope with out-of-order citations, as long as the citations refer to the correct notes and the notes themselves are in ascending order (e.g., 2, 3, 5, 7, 8).

**Warning:** If you are converting plain text notes to linked notes and your document has footnotes in the author paragraph(s), the conversion function must be run before Author Processing to prevent the incorrect handling of author footnotes .

## Whole-document vs Section-by-Section Conversion of Notes

Historically, the eXtyles function to convert linked notes to plain text always placed the plain-text notes at the end of the document. However, notes are sometimes set up with numbering that restarts at the beginning of each Word section.

The eXtyles functions to convert linked notes to plain text and to convert them back to linked notes can now be set up to process notes either on a whole-document basis (the historical behavior) or by section. In the latter case, notes can be converted to plain text and “re-linked” from the end of the Word section in which they are cited, making it possible to support note numbering that restarts with each section.

Note that processing notes by section means that plain-text notes must be placed at the end of the section in which they are cited, not at the end of the document, irrespective of whether the note numbering restarts at 1 for each section.

A third possibility is to set these functions up so that the user is prompted to select for each document whether the notes should be handled on a whole-document or section-by-section basis.

Please contact your Inera support representative at [eXtyles-support@inera.com](mailto:eXtyles-support@inera.com) if you would like to add support for section-by-section numbering of notes.

## Note Workflow Choices in eXtyles

The new ability to convert plain-text notes back to linked Word notes opens up various possible workflows for handling footnotes and endnotes with eXtyles. The most appropriate workflow for your editing team will depend on several factors, and ultimately on the intended output(s) from the eXtyled Word document.

Possible note workflows include the following:

1. **Existing Plain-Text Workflow:** You can continue to convert linked notes to plain text on activation and leave them as plain text throughout eXtyles processing.
2. **Convert to Linked Notes for Downstream Processing:** Having converted the linked notes to plain text on activation, you can convert the notes back to linked notes from the Post Processing Cleanup dialog after eXtyles processing, for example to allow the Word file to be printed to PDF or imported into Adobe InDesign with footnotes and endnotes in the correct locations.
3. **Retain Linked Notes throughout the eXtyles Process:** It is now possible to leave the notes as linked on activation, but then to use round-tripping to allow Auto-Redact to work on the note content, and also go give processes such as Citation Matching access to the notes to mark bibliographic citations or citations of e.g. tables and figures that occur in the notes.

## Working with Linked Word Notes in eXtyles

If you elect to keep notes linked on activation, it is now possible for eXtyles to convert the notes to plain text as part of subsequent processes and then automatically convert them back to linked notes again after eXtyles has made changes to the note text. In this way, eXtyles processes can be run on linked Word notes while retaining their Word properties.

Most eXtyles functions can be set to “round-trip” linked notes so that their content is accessible. If you are interested in taking advantage of this functionality, please contact your eXtyles support representative at [eXtyles-support@inera.com](mailto:eXtyles-support@inera.com).

If you decide to edit linked notes using Auto-Redact, there are two important considerations to keep in mind:

1. You must inactivate any existing Auto-Redact rules that remove the Endnote Reference or Footnote Reference character styles. If these styles are deleted during Auto-Redact, it is not possible to convert the plain-text notes back to linked notes.
2. Your linked notes will not have been styled from your Paragraph Styling palette. Instead, they will use whatever paragraph styles were applied by the author: possibly Word’s built-in Footnote Text and Endnote Text styles, but possibly other styles. Therefore, you will need to think carefully about which Auto-Redact rules will apply to your note content.

Linked Word notes can also be accessible to most Cleanup. There are several exceptions, however. The following Cleanup functions will **not** make any changes to linked Word notes:

- Auto-Style (Regular body paragraphs, Tables, References)

- Removal of Page breaks, Section breaks, and Column breaks
- Removal/Export of Graphics
- Auto-Text to Plain Text conversion for Word fields, Lists, and Headings

The following Post-Processing Cleanup functions will also run on linked Word notes:

- Removal of text highlighting and shading
- Removal of paragraph shading
- Conversion of user-defined and built-in character styles to face markup

Note that the Post Processing Cleanup function that removes unused Word styles will correctly retain styles that are used only in a footnote(s) or endnote(s).