

Footnotes and Endnotes

Footnotes and Endnotes are notes relating to a text, but which are not placed in the body text in order to increase its legibility. The Footnote or Endnote contains additional explanations of the main text, such as legends, notes, sources for quotes etc., which can be quite extensive. Footnotes and Endnotes consist of a reference character in the body text and the Footnote or Endnote text. The Footnote text generally appears at the end of the text area or the chapter, Endnotes at the end of the chapter or the main text, whereby the Footnote/Endnote Label (character or number) is repeated before the appropriate text.

The program offers extensive functions for the entry, management and display of Footnotes and Endnotes. Below is a short overview:

- An unlimited number of Footnotes and Endnotes can be applied in a document.
- Footnotes and Endnotes are numbered automatically by the program. The numbering changes automatically as soon as Footnotes or Endnotes are inserted or deleted.
- The numbering of Footnotes and Endnotes can follow per document or chapter.
- Style Sheets can be assigned to Footnotes and Endnotes both manually and automatically.
- Endnotes can be output at the end of the body text or at the end of the chapter.
- Footnotes can be displayed at the foot of the text object, the text column or at the end of the layout.
- Footnotes and Endnotes can be displayed independently of the body text in several columns and with a separator line.
- Footnote labels can be extended with a text that is displayed in front of and/or after the Footnote label (Prefix and Postfix).

Preparations for Footnotes and Endnotes

Preferences for Footnotes and Endnotes

Before you start creating Footnotes and Endnotes, you should make a few preparations:

1. Create **Paragraph Style Sheets** for the **Footnote Text** or **Endnote Text** as well as **Character Style Sheets** for the **Footnote Reference** or **Endnote Reference** and the **Footnote Label** or **Endnote Label**. When creating the Style Sheets, please apply the following rules:
 - Footnotes or Endnotes are ideally displayed in a **font size** that is one or two points smaller than the **body text**.
 - So as not to change the **type color** of the page, the **Line Spacing** of the **body text** and the **Footnote Text** or **Endnote Text** should be identical.
 - The **Footnote Reference** or **Endnote Reference** in the **body text** should be displayed in **Superscript**. In the **Footnote Text** or **Endnote Text** however, the **Footnote Label** or **Endnote Label** character should not be in Superscript, because otherwise the legibility will be lost due to the smaller type.
2. Define the layout of the **Footnotes** and **Endnotes** in the **Preferences**. Subsequent changes in the Preferences only take effect on new text chains or new footnotes and endnotes. Changes for existing text objects and their text chains can be made using the Module palette.
3. Define the **Position** of the **Footnotes** and the number of columns for them in the text object settings.

Define Preferences for Footnotes and Endnotes:

1. Select the **Preferences** option in the **Edit** menu (Windows/Linux) or the **VivaDesigner** menu (Mac OS).
2. Choose the **Text** option.
3. Choose the following options in the dialog section **Footnote Style Sheets**:
 - Choose the **Character Style Sheets** for the **Footnote Reference** and the **Footnote Label** and the **Paragraph Style Sheet** for the **Footnote Text**.
4. Choose the following options in the dialog section **Endnote Style Sheets**:
 - choose the **Character Style Sheets** for the **Endnote Reference** and the **Endnote Label** and the **Paragraph Style Sheet** for the **Endnote Text**.
5. Choose the following options in the dialog section **Footnotes**:
 - Use the entry field **Text Offset** to define the minimum offset between the **body text** and the **Footnote Text**.
 - Use the entry fields **Prefix** and **Postfix** to define if and which character(s) should be inserted before and/or after the **Footnote Reference** and the **Footnote Label**.
 - Use the popup menu **Format** to define how the **Footnote Reference** and the **Footnote Label** should be displayed.

- Use the popup menu **Numbering** to define if the numbering should be **continuous** or **chapter-wise**. With the option **chapter-wise** the numbering starts from the beginning as soon as a chapter break (**New Chapter**) is inserted in the text. (See the section Insert Variable).
- Use the popup menu **Separator** to define if a separator should be displayed between the body text and the footnote text.
- Use the optional entry fields **Vertical Offset** and **Horizontal Indent** to define the position of the separator. Both positive and negative values are allowed.
- Use the additional options **Line Width**, **Color**, **Line Style** and **Length** to define the display of the **Separator**.

In the entry field **Length** absolute values (e.g. **100 mm**) and relative values (e.g. **50%**) are allowed. Relative values relate to the width of the text object. With multi-column text objects the value relates to the width of a text column.

6. Choose the following additional options in the dialog section **Endnotes**:

- Use the popup menu **Display Position** to define if the Endnote at the end should be displayed **After the Related Text**, **In a new Text Column** or **In a new Text Object**.
- Use the entry field **Text Offset** to define the minimum offset between the body text and the **Endnote Text**.
- Use the popup menu **Save to** if the Endnotes should be displayed at **End of Text** or **End of Chapter**.
- Define the additional options **Prefix**, **Postfix**, **Format**, **Numbering** and **Separator** in the same way as the settings for footnotes.

Footnote Position

For every text object in a text chain, you can define how the footnotes should be positioned. This is particularly helpful if the positioning for left and right hand pages is different. In this way you can for example define that for a two-column text object the footnote should be in the right hand column on the left hand page and the left hand column on the right hand page.

Define the Footnote Position:

1. Select the **text object** in which the **Footnotes** are to be displayed. In new documents with an automatic text object, select the text object on the appropriate Alias Page.
2. Choose the option **Special** in the **Object** menu or in the context menu.
3. Select the **Header & Footer** tab.
4. Define the following options in the **Footnotes** section:
 - Use the popup menu **Position** to define the position of the footnotes:
 - Choose the **Layout** option if the footnotes should be displayed at the end of the Layout. If the body text contains no **Layout Break**, the footnotes will be displayed in the same way as with the option **On every text column**. If the body text flows over several text object columns, it may be that some footnotes will be displayed in the previous text object columns and some at the end of the Layout.
 - Choose the option **On every text column**, if the footnotes should be displayed at the end of every text column.
 - Choose the option **On text frame** if the footnotes should be displayed at the end of a text object. With multi-column text objects the footnotes will always be output in the first column.
 - Use the entry fields **Number of columns** and **Gutter** to define the number of footnote columns within a text object column and their gutter.
 - Use the entry field **Start from column** to define from which text object column the footnotes should be displayed. This option can only be selected when the text object has more than one column.
 - Use the entry field **Width** to define the width of the footnotes depending on the number of text object columns. This option can only be selected when the text object has more than one column.

Working with Footnotes and Endnotes

Inserting Footnotes and Endnotes

After completing the preparations for the footnotes and endnotes, you can now begin inserting them.

Insert Footnotes and Endnotes:

1. Position the **Cursor** at the point where the **reference character** for the footnote or endnote should be inserted.
2. Choose the option **Footnote** or **Endnote** in the menu **Text > Insert Character > Insert Variable** or in the context menu **Insert Variable**.

The number for the footnote or endnote will be inserted at the cursor position, and the Style Sheet that was defined in the Preferences will be applied to it. At the same time, the footnote or endnote number (label) followed by a default footnote or endnote text will be inserted (in the predefined position), and the Style Sheet that was defined in the Preferences will be applied to them. You can now overwrite the footnote or endnote text and replace it with your own.

Convert Footnotes and Endnotes

Footnotes and endnotes can be converted at any time.

Convert Footnotes and Endnotes:

1. Position the **Cursor** exactly in front of the **Footnote number** or **Endnote number** (reference) in the **body text**.
2. Choose the option **Note Settings** in the context menu.
3. In the popup menu **Type**, define whether the number is a **Footnote** or an **Endnote**.
4. If you still have the default note text (“Footnote text” or “Endnote text”) showing in the lower section of the dialog, it is advisable to change it accordingly.
5. Complete your settings with **OK**.

Automatic Numbering

All footnotes and endnotes are numbered automatically. If you insert a new footnote or endnote in the body text, the program checks whether there are additional footnotes or endnotes before and after, and changes the numbering of the footnotes and endnotes according to the preferences set.

You can switch the automatic numbering for individual footnotes or endnotes on or off. This can be helpful if you want to insert a footnote or endnote that should not be counted with the others or if all footnote or endnote references consist of a character (e.g. *). Such exceptions are often used if the footnote contains a reference to the author of the article or if very few footnotes are used in the whole body text.

Switch off Automatic Numbering:

1. Position the **Cursor** exactly in front of the **Footnote number** or **Endnote number** (reference) in the **body text**.
2. Choose the option **Note Settings** in the context menu.
3. Choose the option **No** in the popup menu **Numbering** if you want to enter a manual number or an appropriate character for the footnote or endnote.
4. Enter the required character(s) in the **Custom Text** field. As default the program shows an asterisk (*).
5. Complete your settings with **OK**.

You can change this setting at any time and switch the automatic numbering on again.

Switch on Automatic Numbering:

1. Position the **Cursor** exactly in front of the **Footnote number** or **Endnote number** (reference) in the **body text**.
2. Choose the option **Note Settings** in the context menu.
3. Choose the option **Yes** in the popup menu **Numbering** if the footnote or endnote should be numbered automatically.
4. Complete your settings with **OK**.

Deleting Footnotes and Endnotes

Delete Footnotes and Endnotes:

- Delete the **Footnote Reference** or **Endnote Reference** number in the **body text**.
- Alternatively, delete the **Footnote Text** or **Endnote Text** **AND** the **Footnote Label** or **Endnote Label** (number).

The footnote and the **Footnote Reference** will then be deleted automatically. If necessary, the footnotes and/or endnotes will be renumbered.

General Tips for Footnotes and Endnotes

- Deleting or overwriting The **Footnote Label** or **Endnote Label** has no influence on the numbering.
- Overwriting the **Footnote Reference** or **Endnote Reference** causes the connection to the automatic numbering to be lost.
- Overwriting the **Footnote Reference** or **Endnote Reference** in the **body text** automatically deletes the footnote or endnote.
- If you choose the option **Select All** in the footnote text, all the footnotes in the current text column will be selected.
- When using the command **Cut** in the body text for text containing a footnote or endnote, the **Footnote Text** and/or the **Endnote Text** will be cut with it and copied to the **Clipboard**. If you paste text containing a footnote or endnote, the Footnote Text and/or the Endnote Text will be pasted with it.
- You can copy footnote or endnote text to other footnotes or endnotes as well as to the body text.
- In a footnote or endnote text it is not possible to insert a footnote, an endnote or a chapter break. Although it is possible to insert a layout column break, a text object break or a layout break, this is not recommended for technical reasons.
- Only the whole footnote or endnote text may be displayed.
- Breaking footnote or endnote text is not possible. If a footnote or endnote text cannot be displayed completely in a text column, the footnote and/or endnote text including the line in the body text that contains the footnote or end note reference will be broken to the next column or the next text object. If this is not possible, a text overflow will be displayed (providing you have activated the guide lines with the shortcut keys Ctrl + L (Windows/Linux) or Command + L (Mac).
- Column settings for Layouts are not valid for footnote or endnote text.
- Column settings for footnotes can only be defined for the text object.