



eXtyles User Documentation

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Getting started with eXtyles

Welcome to the world of eXtyles!

The eXtyles family of editorial and XML solutions allow publishers to automate the most time-consuming aspects of document cleanup, formatting, and editing and to produce accurate XML with the click of a mouse. All eXtyles processes are run in Microsoft Word, providing a familiar, easy-to-use environment that requires no XML expertise. You may be wondering: What is eXtyles? How do I install it? How do I use it? The answer to all of these questions can be found here.



Explore this section

What is eXtyles?

eXtyles Support

Installation

eXtyles Ribbon

Microsoft Word and eXtyles

Questions? Comments?

Feel free to contact eXtyles Support at any time. Simply email us at eXtyles-support@inera.com or through our [Support Portal](#). We'll be happy to help!

What is eXtyles?

eXtyles allows editorial staff to automated editing, styling, and XML creation in the familiar Microsoft Word environment. It provides a bridge between editorial departments, which need easy-to-use tools, and production departments, which increasingly need XML for web, print, and ePub production.

eXtyles extends the functionality of Word by automating the formatting and structuring of documents derived from various sources and by enforcing specific editorial style requirements. It is an integrated suite of tools that simplifies the time-consuming and error-prone aspects of cleaning up, styling, and editing content. eXtyles enables users to:

- Mold Word documents into a standard style
- Automatically edit references to a preferred style
- Check Harvard- or Vancouver-style reference citations
- Export valid XML from Word (NLM and other DTDs)
- Improve editorial quality and cut production costs

Every version of eXtyles offers specific editorial features as well as XML export options customized for each publisher's unique workflow needs.

eXtyles Support

Technical support queries should be communicated to your organization's internal eXtyles liaison (this person is usually chosen during User Training). He or she will then contact Inera and will be responsible for communicating Inera's replies to the eXtyles users in your organization.

All technical support questions should be sent to eXtyles-support@inera.com. Your assigned Inera representative (usually the person who trained you) will receive these queries, as will the other members of Inera's support team, ensuring that the question will be addressed promptly even if your representative is unavailable at the time.

If possible, please provide the following information when submitting technical support queries:

- A complete description of the problem, including the eXtyles step at which the problem occurred
- Your version of Microsoft Windows
- Your version of Microsoft Word
- Your eXtyles build number (this can be retrieved by clicking the "About eXtyles" button on the eXtyles ribbon)
- Any relevant documents, including the working version and \$base or \$original files created by eXtyles during processing

Including this information will help us solve your problem quickly and efficiently. Thank you!

If you encounter problems while working with eXtyles, please check out the [eXtyles support pages](#). Most common issues are described there.

Installation

Installation requirements

eXtyles is an advanced add-on to Microsoft Word that is simple to install. Before installing eXtyles, review the following software and hardware requirements and recommendations:

- Microsoft Word for Windows (32-bit only): 2007, 2010, 2013, or 2016
- Microsoft Windows (32- or 64-bit): 7, 8, 8.1, or 10
- 1024 x 768 screen resolution (minimum)
- 2.5 GHz Intel Core i5 dual-core CPU equivalent or faster (recommended: systems less than four years old)
- 8 GB RAM (minimum; we recommend twice the minimum Microsoft specification for any combination of Windows and Word)
- 1 GB free HD space to install
- Internet access for certain processes (e.g., PubMed/Crossref Reference Checking)

eXtyles supports 64-bit Windows, but 64-bit Microsoft Office does not support eXtyles. [Learn more](#)

Before installing eXtyles, ensure that you are logged into your PC under an account with administrator privileges. Quit Microsoft Word before running these step.

Installing eXtyles

To install eXtyles:

1. If you are installing a keyed version of eXtyles, install the HASP drivers and hardware key by following the instructions in the next section, "Installing eXtyles with a Hardware Key."
2. Double-click the eXtyles installation file that you downloaded from the provided URL; this file will probably look something like eXtyles for Organization.exe.
The InstallShield Wizard will open and provide you with step-by-step instructions for entering your user information and installing the program.
3. If necessary, install any patch files according to the instructions provided by Inera.
4. Start Microsoft Word.
5. If necessary, accept the security alert to allow macros signed by Inera Inc. to run. You will see the eXtyles menu added to the Word ribbon (or to the Word menus in earlier versions of Word). If you do not see the eXtyles menu/ribbon in Word after installation, please visit our FAQ or contact eXtyles technical support at eXtyles-support@inera.com.

Common installation issues and their solutions are documented in our [eXtyles FAQ](#).

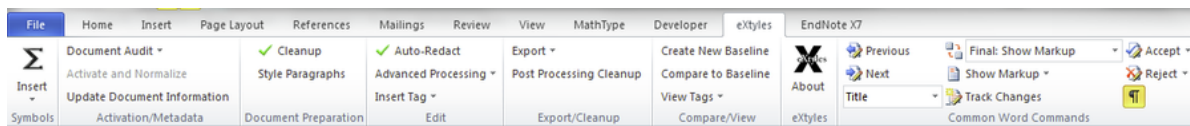
Installing eXtyles with a Hardware Key

Some customers must have a hardware key, in the form of a small USB drive, inserted into a USB drive on a computer before installing eXtyles. If this is the first time you are installing eXtyles on this specific computer, you must first install the HASP drivers for the key before installing eXtyles as follows:

1. Download the HASP drivers from http://www.exstyles.com/drivers/HASP_drivers_latest.zip.
2. Attach your hardware key from Inera to a USB port on the PC.
3. Unzip the downloaded drivers from step 1; inside the resulting folder *Sentinel_HASP_Run-time_setup*, double-click the file *HASPUserSetup.exe*.
4. Reboot your PC (at this point, a red light should be glowing on the end of the hardware key).

You can then install eXtyles as described earlier in this section. When prompted for a serial number, enter the serial number attached to that key.

eXtyles Ribbon



eXtyles processing is performed in stages, where each stage represents a step in the document's life:

1. **Activation/Metadata:** The document acquires an "identity" in the form of metadata.
2. **Document Preparation:** The document as a whole is cleaned up, structured, and styled.
3. **Edit:** The document content is automatically edited and validated for consistency and accuracy.
4. **Export/Cleanup:** The processed document is cleaned up in preparation for production, or it is exported to XML.

Those four stages are used to organize the various eXtyles functions into groups on the eXtyles ribbon. As a general rule of thumb, eXtyles functions are applied in the order that they appear in the menu, working from top to bottom and left to right.

You may notice that when a document is first opened in Word, only the Document Audit and Activate and Normalize options are available. Once a document is successfully activated, all other eXtyles functions will become available.

A typical document may go through the following processes in order:

1. **Perform Document Check:** Review your document for unusual formatting.
2. **Document Audit:** Font Audit: Automatically check the fonts used in the document for compatibility with eXtyles processing.
3. **Activate and Normalize:** Provide document metadata and automatically normalize the document.
4. **Cleanup:** Automatically remove unnecessary white space and formatting attributes and apply default paragraph styles.
5. **Style Paragraphs:** Apply custom paragraph styles to document content.
6. **Auto-Redact:** Automatically edit the document for consistency and correctness.
7. **Advanced Processing:** Automatically style and validate document content using a variety of custom processes.
8. **Export or Post-Processing Cleanup:** Automatically export your document to XML format, or cleanup your document in preparation for non-XML production.

All items on the Advanced Processing menu must be run in the order they appear, top to bottom.

Other functions on the eXtyles ribbon can be performed as necessary, in any order:

- **Update Document Information:** Modify the document metadata
- **Insert Tag:** Insert tags for specific purposes, such as table size tags.
- **Create New Baseline:** Save a new \$base copy of the document for comparison.
- **Compare to Baseline:** Review the differences between the working copy and previously saved \$base versions of the document.
- **View Tags:** Toggle the display of eXtyles tags from Show to Hide.

Is the eXtyles ribbon missing? Check out common solutions to this problem in the [eXtyles FAQ](#).

Microsoft Word and eXtyles

eXtyles works as an extension to Microsoft Word. eXtyles manipulates the Word document, but until converting the document to XML, the file remains in DOC (or DOCX) format and can be opened and edited on any system running Word—even on a system that does not have eXtyles installed, such as that of an external reviewer or freelance copyeditor.

After eXtyles is installed, eXtyles functions are accessible from an eXtyles menu that is added to an eXtyles tab in the Word ribbon or to the Word toolbar. All eXtyles processing is carried out on Word files.

Users of eXtyles are expected to be conversant with the standard features and functions of MS Word.

Reviewing Word Styles

It is often useful, especially after using the eXtyles Paragraph Styling palette, to review the styles you have applied to a document. Opening the Word style width area window on the left side of your document is the easiest way to review the styles you have applied. The Word style width area will be displayed in Word's Draft viewing mode (on your screen only, not in the printed document) to the left of your screen.

To enable this feature in Word:

From the Word View tab, select Draft.

1. Select the Word File menu.
2. Navigate to Options > Advanced > Display > Style area pane width in Draft and Outline views.
3. Set the Style Area Width setting to your preferred width (0.7 inches is a good starting value).

Once this window is open, the style name of each paragraph is displayed to the left of your screen. You can page or scroll through your document to review the styles you have applied to each paragraph. Close this window by dragging on the vertical line all the way to the left edge of your Word window, or resetting the value as described in this section to 0.

Word Comments

Word comments are automatically inserted during some Advanced Processes (e.g., Bibliographic Reference Processing) if eXtyles has discovered an error or ambiguity that requires editorial review (or a query to the author). They may also be inserted by hand with the Comment option from the Word Insert or Review menus. Comments, or queries, are automatically renumbered. They are placed appropriately during export.

You can view and manipulate comments using the Word Reviewing toolbar, or Review tab. Adding or deleting Word comments will automatically renumber the remaining comments.

Comments added by Advanced Processing functions are labeled with the "author name" of the appropriate Advanced Processing menu item. If you have added other comments, they will appear with your name. You can select to see comments from a specific reviewer, or just from a specific Advanced Processing function, by using the reviewer selection at the top of the Word Comments window.

If an eXtyles Advanced Process adds an unusually large number of queries and you would like to delete all queries from that process, use the Remove Word Comments function in the eXtyles Cleanup dialog. Be sure to first click Clear All, and then

check Remove Word Comments, and select the specific process (e.g., eXtyles Citation Match) for which you would like to remove the comments.

The text of most eXtyles comments can be customized! Contact eXtyles-support@inera.com to learn more.

Reviewing Toolbar

eXtyles makes use of Word's reviewing tools, including comment balloons. These appear in Word's Print Layout view and are best viewed and manipulated when the Word reviewing toolbar is open.

To open this toolbar in Word, select the Review tab.

Comments inserted during eXtyles Advanced Processing can also be viewed by rolling the mouse over the comment insertion point in Word's Normal view. In Print Layout view, comments are included as marginal balloons. To view comments, the Display for Review window on the reviewing toolbar must be set to Final Showing Markup.

The eXtyles ribbon also includes many of the basic features of the Word Reviewing toolbar, including comment navigation and view/hide hidden characters.

Preparing your document

First things first

The first step in the eXtyles process is Document Preparation. This section provides information on reviewing your document for unusual formatting, automatically checking the fonts used in your document, providing document metadata, and automatically normalizing your content.



Explore this section

Reviewing your document

Document Audit: Font Audit

Activation and Normalization

Questions? Comments?

Feel free to contact eXtyles Support at any time. Simply email us at eXtyles-support@inera.com or through our [Support Portal](#). We'll be happy to help!

Reviewing your document

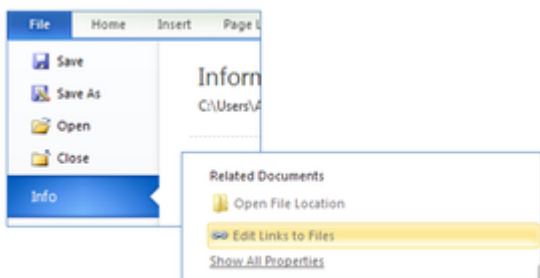
When you first open a document in Word—before you start working with eXtyles—check the following items by giving the document a quick visual review for anything that might cause problems during eXtyles processing.

Graphics

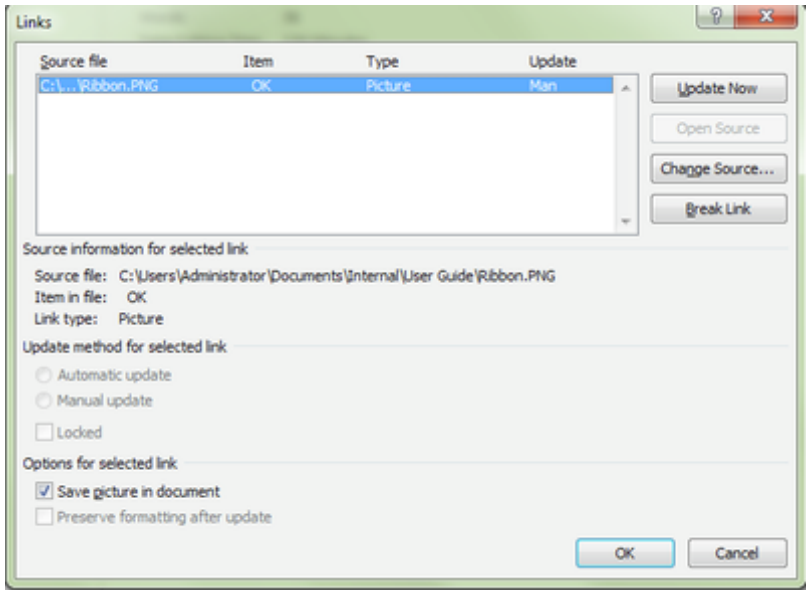
Graphics embedded in Word files may be left in place during eXtyles processing. However, for best performance Inera generally recommends removing these graphics during eXtyles processing. Embedded images increase the file size of your document and can cause eXtyles to perform much more slowly. If you prefer to leave graphics in the Word document, it is recommended that you insert linked images.

Some workflows may require linked images to be converted to embedded images after eXtyles processing. The following steps describe how to easily convert linked images to embedded images.

1. In Word 2010 and later, click the File tab, and then select Info. (In Word 2007, click the Office button, and then select Prepare.)
2. Click Edit Links to Files, located under the Related Documents heading. Note that this option only appears if there is a linked file in your document.



3. Select the linked files that you want to embed in your document.
4. Check the box for Save picture in document.
5. Click the Break Link button. A dialog opens; click Yes to confirm this action. The links are removed and the graphics are now embedded in your document.



Reference Head

For documents that have Harvard-style (i.e., name–date) citations and therefore unnumbered references, the reference list should be preceded by a standard head such as “References,” “Bibliography,” and so on. eXtyles Auto-Styling, which runs during Cleanup, automatically applies the appropriate paragraph style to references, eliminating the need to manually style this section of the document. Although eXtyles can usually identify a numbered reference list without a reference head, unnumbered lists require a head for eXtyles to accurately identify the content.

Tables

Authors occasionally use a variety of creative methods to construct tables in Microsoft Word. eXtyles is optimized for tables that have been built using the Word table editor.

If tables are not converted to the Word table editor prior to eXtyles activation, you may lose the layout of the table, or some eXtyles functions may not work correctly.

Before activating a document with eXtyles, you should convert all tables built in other ways (e.g., tab-delimited, Excel table, etc.) into Microsoft Word tables. For more information about identifying and converting tables, please see the eXtyles guide, “A Table is a Table is a Table,” available at http://www.inera.com/support/additional_guides.

Header	Header	Header	Header
Body-Text	Body-Text	Body-Text	Body-Text
1	2	3	4
11	22	33	44
111	222	333	444
1111	2222	3333	4444

Header	Header	Header	Header
Body-Text	Body-Text	Body-Text	Body-Text
1	2	3	4
11	22	33	44
111	222	333	444
1111	2222	3333	4444

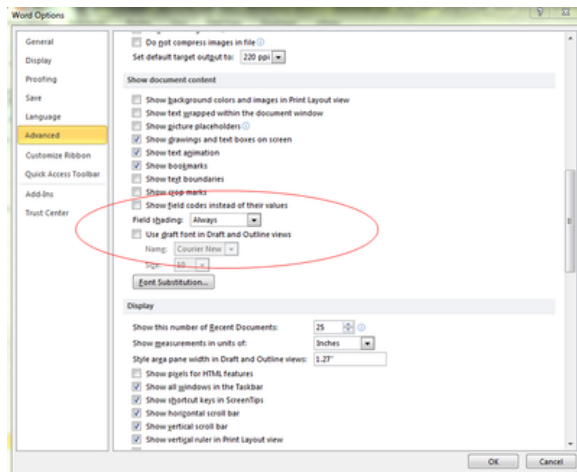
(Left) Correct: Table formatted using Word's table editor. (Right) Incorrect: Table formatted using tabs and hard returns.

Visual Format

Look to see if the document has any formatting that is particularly unusual (e.g., especially large or small fonts, odd typefaces, garbage characters). Such formatting problems may indicate a document that was poorly imported from another word processing program or that will cause other problems as you work with it. If you encounter a document like this, determine which word processor the author used.

To facilitate the visual check of a manuscript, we recommend setting Field Shading in Microsoft Word to Always. This setting will cause all embedded fields (such as citations and references set up with reference management tools such as EndNote) to appear with a gray shade. Often this gray shading will aid in identifying potential problems in Word documents.

To enable Field Shading, select the File tab in Word and navigate to Word Options / Advanced / Show document content / Field shading, and change from When Selected to Always.



In Word Options, set Field shading to Always.

hypoxemia) or in hypoxia (3) predict the decrement in VO_2max in hypoxia and therefore the amplitude of the "hypoxic stimulus". This metric termed "saturation hours" is defined as

$$\%h = (98/s - 1) \times h \times 100$$

where: s is the saturation value (in %) and h the time (in hour) sustained at any s level.

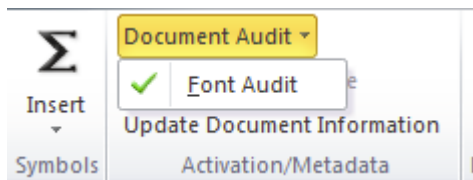
Practically, with the development of new sport gears incorporating the oximeter inside the textile, this metric will readily be measured without any disturbances to individuals.

REFERENCES

1. Faiss R, von Orelli C, Dériaz O, Millet GP. Responses to exercise in normobaric hypoxia: comparison of elite and recreational ski mountaineers. *Int J Sports Physiol Perform* 9: 978–984, 2014. <http://dx.doi.org/10.1123/ijsp.2013-0524>. PubMed

Fields in the document are shaded for easy identification.

Document Audit: Font Audit



The first step in using eXtensions on a document is Document Audit, the first item on the eXtensions ribbon, which contains the **Font Audit** menu item. Font Audit identifies all fonts used in the document. When a font that is not supported by eXtensions is used in the document, Font Audit will alert you to the problematic font.

Font Audit will also detect and report any Microsoft Office Equation Objects. Depending on your workflow, you may use this information to find and convert the Office Equation Objects to MathType objects.

Font Audit must be run on each document prior to activation with eXtensions.

How to use

To run Font Audit:

1. Click Document Audit from the eXtensions
2. Select Font Audit

A dialog box will appear listing all the fonts that have been used in your document.

When the Font Audit dialog box appears, review the list of fonts. Fonts fall into one of the following categories:

- Windows fonts that are supported by eXtensions
- Special character fonts that are supported by eXtensions
- Macintosh fonts that are fully supported by eXtensions
- Special character fonts that are not supported by eXtensions

Follow any instructions that appear in the dialog box. For most documents, reviewing the list is all that is necessary, as most common fonts (e.g., Times, Arial, Courier, Symbol) are fully supported. In general, any font with a standard character layout is fully supported. Font Audit detects when an

author may have used a special character font that is not supported by eXtensions.

A list of common supported fonts appears at the end of this document. The list also includes a list of unsupported fonts of which Inera is aware. However, this list is not all-inclusive, due to the large number of fonts in existence. If you encounter any font name that is not listed, please contact your eXtensions site administrator for further instructions.

Font Audit must be run on each document prior to activation with eXtensions. If you run Font Audit after Document Activation, the results may not be accurate, and you will see the following warning dialog box.

Want to know what fonts eXtensions explicitly supports or does not support? See [Supported and Unsupported Fonts](#).

Supported and Unsupported Fonts

Supported Fonts

The following fonts are explicitly supported by eXtyles. Note that when fonts have bold or italic variants, those faces are also supported.

Normal Windows Fonts

- Arial Greek, Baltic, CE (Central Europe), Cyr (Cyrillic), Tur (Turkish), Arabic, Hebrew
- Courier
- Courier Greek, Baltic, CE (Central Europe), Cyr (Cyrillic), Tur (Turkish)
- Courier New
- Courier New Greek, Baltic, CE (Central Europe), Cyr (Cyrillic), Tur (Turkish), Arabic, Hebrew
- Garamond
- Gulim
- Lucida, Lucida Sans, Lucida San Unicode
- MS Mincho (may appear in Word files from Asian authors)
- Palatino
- PMingLiU (may appear in Word files from Asian authors)
- SimSun
- Tahoma
- Times
- Times New Roman
- Times New Roman Greek, Baltic, CE (Central Europe), Cyr (Cyrillic), Tur (Turkish), Arabic, Hebrew
- Tms Nw Rmn

Special Character Fonts

- Adobe Mathematical Pi 1 through 6
- Arial Special G1
- Arial Special G2
- Euclid
- Euclid Extra
- Euclid Fraktur
- Euclid Math One
- Euclid Math Two
- Euclid Symbol
- FEBTechnical
- Map Symbol
- Marlett
- Math Ext
- Monotype Sorts
- MT Extra

- Multinational Ext
- Symbol
- Times New Roman Special G1
- Times New Roman Special G2
- Wingdings
- Wingdings2
- Wingdings3
- Zapf Dingbats
- WP BoxDrawing
- WP Greek Century
- WP Greek Courier
- WP Greek Helve
- WP IconicSymbolsA
- WP IconicSymbolsB
- WP MathA WP MathB
- WP MultinationalA Roman
- WP MultinationalA Courier
- WP MultinationalA Helve
- WP MultinationalB Roman
- WP MultinationalB Courier
- WP MultinationalB Helve
- WP TypographicSymbols
- SILDoulos IPA93*
- SILDoulosIPA*
- SILManuscript IPA93*
- SILManuscriptIPA*
- SILSophia IPA93*
- SILSophia IPA93*
- SILSophialPA*

*The SIL phonetic fonts are supported only if you have licensed the eXtyles Phonetic Fonts Pack.

Macintosh Fonts

- Chicago
- Geneva
- Helvetica
- Monaco
- New York
- Times
- Symbol

Unsupported Fonts

Math Fonts

- UniversalMath1 BT
- UniversalMath I

Phonetic Fonts

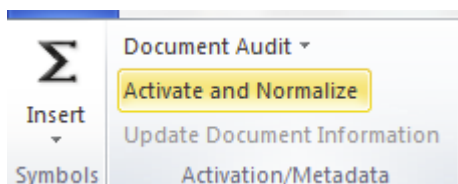
- IPA Kiel
- IPARoman
- IPAPhon
- Phonetics
- TechPhonetic
- Times PhoneticAlternate
- Times PhoneticIPA
- WP Phonetic

Other Special Character Fonts

- Bookshelf Symbol
- Dingbats
- Webdings
- WP Arabic
- WP Hebrew
- WP Japanese

In some cases, you will see “????” or numeric characters as the name of a font. This usually happens when an author has used MS Mincho or PmingLiU. You should be alert for special character problems in this situation, but usually none are reported.

Activation and Normalization



Once the [Font Audit](#) step has been performed, the next step is Activate and Normalize. In this step, eXtyle activates your document (allows it to be processed) and normalizes it (prepares it for processing). The Activate and Normalize function follows these steps, some of which are automatic:

1. **Save a baseline copy of the document** (an automatic operation)
2. **Document preparation** (an automated and, in some cases, interactive operation)
3. **Set document information** (an interactive operation)

Before you select the Activate and Normalize function, only the options Document Audit, About eXtyle®, and Activate and Normalize are available in the eXtyle menu/ribbon.

How to use

1. Select **Activate and Normalize** from the eXtyle ribbon
2. Enter your document's metadata in the Document Information dialog (see [Setting Document Information](#) below)
3. Click OK. eXtyle will perform some automatic steps to prepare your document for eXtyle processing.

After the Activation and Normalization stage is complete, the remaining selections of the eXtyle menu are enabled.

Activation and Normalization Process

Save a baseline copy

When you select the Activate and Normalize function, eXtyle automatically saves a baseline copy of the document in native Word format in the same directory in which the original document is located. The baseline document is saved with the name document\$base.doc, where document is the original document's filename.

If the original document is not in native Word format—that is, it is not a .doc or .docx file—eXtyle prompts you to save the document as a Word file before continuing. After you save the document in native Word format, eXtyle creates the baseline copy automatically.

If you want to create additional baseline documents later in the eXtyle process, you can use the Create New Baseline function to create additional copies of the document; see “Create New Baseline.”

Never edit or manually modify document\$base.doc. If you open this baseline document, you will be prompted to open it in read-only mode. Make sure to choose "read-only" when opening the document so that it cannot be edited or modified.

Document preparation

After the baseline document has been saved, eXtyles automatically normalizes your document (performs initial document preparation), which includes the following operations:

1. Accept all changes if Track Changes was turned on, and then turn off Track Changes
2. Normalize font-offset combinations for special characters
3. Apply a temporary monospace-font paragraph style to paragraphs that are entirely in a monospace font but not in a monospace-font paragraph style; this step allows flexibility during the Cleanup stage. See the section "Cleanup" for more information.
4. Remove unnecessary author formatting (such as font size and font color changes)
5. Footnotes and endnotes are unlinked and converted to plain text.

Additional document preparation steps might be necessary before other eXtyles functions can be executed. Typically, tables that are set as text rather than using Word's table editor require preparation and cleanup prior to Activation and Normalization.

Activation can provide additional document cleanup by removing all unused character and paragraph styles. Hold the Shift key and press OK on the Document Information Dialog to open the Remove Unused Styles optional dialog, and select Yes to remove unused styles. This feature can be used to Activate problematic Word documents that contain a large number of styles.

Setting document information

In addition to these automatic background steps, when you select the Activate and Normalize function from the eXtyles menu, eXtyles displays the Document Information dialog.

Use this dialog to provide data about the document to eXtyles and select the style template to be used with the document. eXtyles saves and maintains this document-specific information with the document.

1. Select the desired Publisher Configuration and Publication from the drop-down lists. These selections specify the style template that is attached to the document being processed. Each template contains a collection of styles specific to the publication and publisher. These settings also control the list of active dictionaries for the Auto-Redact operation and the reference template used during reference processing.
2. Enter other information in the appropriate fields. Pay special attention to required fields indicated by asterisks (*), such as Article Type and Article ID.
3. If you want to replace the current document header and footer with the information collected in the Document Information dialog, check the Add Document Information to Header box. Dialog information is placed in several lines in the document header; page numbers in the form "page X of Y" are placed in the document footer. If the box is not checked, the header and footer are left as the author typed them.
4. Click OK to save the document-specific information.

You can change the document information later by selecting Update Document Information from the eXtyles menu/ribbon.

Document metadata stored in a web-based database or in an external transmittal file can be automatically imported during the Activation and Normalization phase using the **Metadata Browse/Import** feature.

Troubleshooting

If eXtyles freezes or has dramatically changed your document during the Activation and Normalization process, please contact exstyles-support@inera.com. Common solutions for "difficult documents" can be found in the [eXtyles FAQ](#).

Metadata Browse/Import

Depending on your organization's configuration, Document Activation may also include the Get Metadata add-in. This feature sends a query to your organization's specified metadata web service, connects to the relevant database, and imports the correct metadata to your Document Information form. This information is also added to the exported XML and, depending on your editorial style, the title page.

How to use

To search for document metadata, fill in the search fields and click Get Metadata.

Warning: Do not edit metadata in the Update Document Information form. Such changes will only affect local records and not records in the database.

Styling and Editing

It's your style

After you have [Activated](#) and [Normalized](#) your document, you can begin formatting and editing your content. This section provides information about automatically removing extraneous white space and formatting (Cleanup), applying custom paragraph styles to the document, and automatically copyediting content using Auto-Redact.



Explore this section

Cleanup

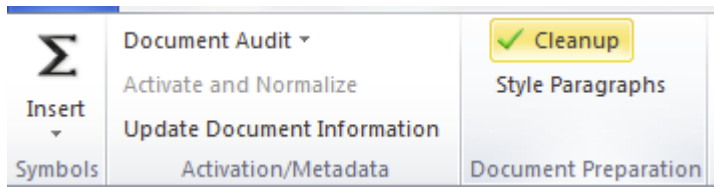
Paragraph Styling

Auto-Redact

Questions? Comments?

Feel free to contact eXtyles Support at any time. Simply email us at exstyles-support@inera.com or through our [Support Portal](#). We'll be happy to help!

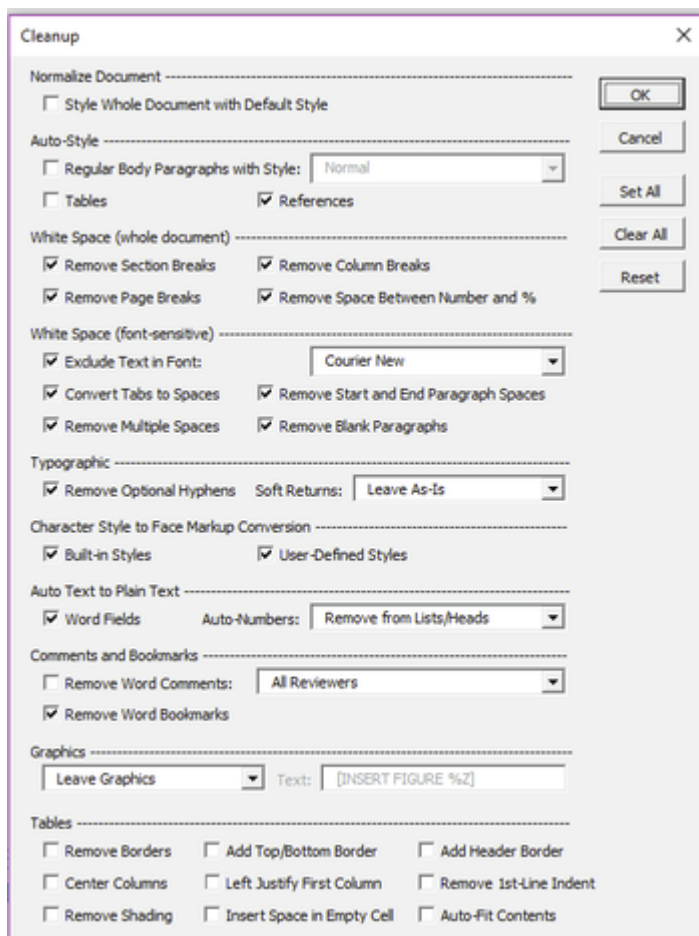
Cleanup



Use the Cleanup tool to automatically remove unnecessary white space and Word formatting attributes that are not needed for eXtreme processing. All cleanup functions are described below.

How to use

1. Select Cleanup from the eXtreme menu. The Cleanup dialog box will open.
2. Check the boxes of the operations you want included in the process and click OK.



Cleanup operations

Cleanup supports the following operations:

Normalize Document

Style Whole Document with Default Styles

All paragraph styles are converted to the Default Style (the Word style "Normal," unless a specific override is a part of your configuration).

Auto Style

Regular Body Paragraphs with Style

All regular body paragraphs are converted to the style selected in the drop-down box. Local italic and boldface markup is retained.

Learn more about how eXtyle identifies regular body paragraphs here: [Auto-Style Regular Body Paragraphs](#)

Tables

Tables created with the Word Table Editor are automatically styled with Table Head, Table Body, and Table Footnote paragraph styles. Table titles are automatically styled even if they are outside of the table.

References

Numbered references, or unnumbered references that follow a heading such as "References," are automatically styled as Reference paragraphs.

Whitespace

The following White Space Cleanup options will be performed on the entire document.

Remove Section Breaks

Word's section breaks are removed.

Remove Page Breaks

Word's page breaks are removed.

Remove Column Breaks

Word's column breaks are removed.

Remove Space Between a Number and %

Spaces between a number and the % sign are removed.

The following White Space Cleanup options may be set to exclude text in a specified font. Please see [White Space Cleanup: Excluding Paragraphs in a Specified Font](#) for more information.

Convert Tabs to Spaces

Each tab character is converted to a single space.

Remove Multiple Spaces

Multiple spaces are converted to a single space. Note that this step is performed after converting tabs to spaces, so all extra white space is removed.

Remove Start and End Paragraph Spaces

Leading and trailing spaces in paragraphs are removed. Note that this step is performed after converting tabs to spaces, so all extra white space is removed. Nonbreaking spaces and soft returns are also removed.

Remove Blank Paragraphs

Blank paragraphs are removed.

Remove Optional Hyphens

Discretionary hyphens are removed.

Soft Returns

Soft returns—that is, line breaks inserted with Shift-Enter—are converted to spaces or hard returns.

Character Style to Face Markup Conversion

Built-in Styles

Converts Word's built-in character styles, such as Emphasis and Strong, to plain face markup. This conversion may exclude the Word character styles for "Hyperlink," "Footnote Reference," "Endnote Reference," and "Comment Reference," depending on your configuration.

User-Defined Styles

Converts cases of user-defined character styles to plain face markup. This conversion is most important in preparing the document for advanced processing functions.

Auto Text to Plain

Text Word Fields

Word fields are converted to text. In particular, fields generated by add-in products such as EndNote are automatically converted to plain text.

Auto-Numbered Headings and List

Numbers generated with Word's auto-numbering feature in headers and in numbered lists are converted to plain text.

Comments and Bookmarks

Remove Word Comments

Remove Word comments in the file. The default is to remove all comments. You can also remove comments from specific reviewers by selecting the reviewer from the drop-down list.

Remove Word Bookmarks

Remove Word bookmarks from the file. We recommend selecting this option to avoid conflicts with eXtyles Advanced Processes.

Graphics Action

Leave Graphics/Remove Graphics/Export and Remove Graphics

eXtyles Cleanup can remove all graphics from your manuscript, allowing eXtyles functions to work faster. The default setting is to leave graphics as they are ("Leave Graphics"), or you can select "Remove Graphics" and "Export and Remove Graphics." If you choose to export graphics, they will be placed in a subfolder of the document and named according to the document. Equations and Excel worksheets are not removed when this option is selected.

Advanced configuration capabilities for this option are available. Please contact eXtyles-support@inera.com for more information.

Graphics replacement text box

When you chose to remove graphics, they are replaced with a text string to identify where they were located, and to which exported file they correlate. The default text is "[INSERT FIGURE %Z]" where "%Z" becomes "001", "002", etc. as sequential graphics are removed. This text may be altered to meet your specific needs. Please consult the eXtyles Configuration Guide for further information.

Note: This option is disabled unless you select "Remove Graphics" or "Export and Remove Graphics."

Tables

Remove Borders

Removes borders on all cells and on the whole table. Unchecked by default.

Center Columns

Centers text in all table columns. Unchecked by default.

Remove Shading

Removes all shading in tables. Unchecked by default.

Add Top/Bottom Border

Adds a 1 pt. rule to top and bottom of all tables. Unchecked by default.

Left Justify First Column

Left-justifies text in first column of all tables. Unchecked by default.

Insert Space in Empty Cell

Inserts a single non-breaking space in empty tables cells. Checked by default.

Add Header Border

Adds a border to the heading rows of a tables. Unchecked by default.

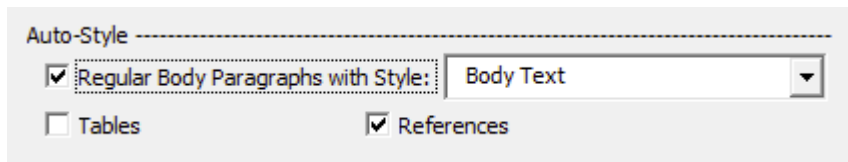
Remove 1st-Line Indent

Un-indent first line of all table cells. Unchecked by default.

Auto-Fit Contents

Removes any specific width settings and applies auto-fit to all table cells. Unchecked by default.

Auto-Style Regular Body Paragraphs



Auto-Style -----

Regular Body Paragraphs with Style: Body Text

Tables References

The eXtyles Auto-Style Regular Body Paragraphs with Style option in the Cleanup dialog can be set to automatically apply your organization's custom body paragraph style to all regular body paragraphs in the Word file, dramatically reducing the time spent manually applying paragraph styles to the manuscript.

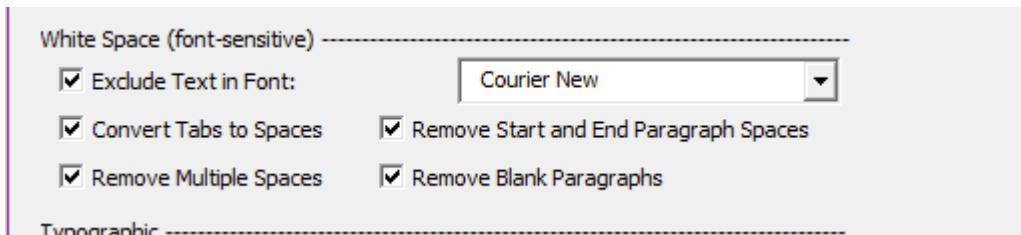
This Cleanup function distinguishes between regular body paragraphs and "special paragraphs" to prevent the incorrect auto-styling of headings, equations, and other non-body paragraph types. A paragraph is deemed a "special paragraph" and is not auto-styled by eXtyles if it meets one or more of the following criteria:

- The paragraph is styled as MTDisplayEquation (i.e. a MathType Display or Right-numbered equation), Footnote Text, or Endnote Text. To configure this criterion, please contact your eXtyles representative.
- The paragraph is not a Body Text level paragraph in Word's Outline view.
- The paragraph begins with a left indent.
- The paragraph is centered or right-aligned.
- The entire paragraph is in the selected font for Preformatted text (e.g. Courier - this font can be preset in your configuration or can be selected from the Cleanup dialog) or in the font of Word's HTML Preformatted style. To configure this criterion, please contact your eXtyles representative.
- The entire paragraph is styled with an ALL CAPS or small caps font or character style.
- The paragraph is shorter than the default 60 characters and ends with a period.
- The paragraph is manually entered in all capital letters and is shorter than the default 60 characters. To configure this criterion, please contact your eXtyles representative.
- The paragraph starts with a lower-case letter.
- The paragraph starts with a space.
- The paragraph starts with an inline shape (e.g. Word drawing object).
- The paragraph starts with a word that suggests a table or figure caption (e.g. "Table", "Figure", "Fig.", "Plate"), followed by punctuation (period, colon, em or en dash or hyphen), a table or figure number followed by punctuation, or the end of the paragraph. The lists of title words include words for "figure" and "table" in a number of European languages; to configure these lists, please contact your eXtyles representative.
- The first character of the paragraph is bold, italic, superscript, raised, or lowered.
- The first character of the paragraph is a digit.
- The first character of the paragraph is a special character in a special character font (e.g. Symbol). Special characters include but are not limited to: opening parentheses, square brackets, angle brackets and braces, asterisk, daggers, raised dot, dashes, and bullets.
- The first character of the paragraph is an opening parenthesis, square bracket, angle bracket or brace, asterisk, raised dot, or dash — and is not in a special character font.

White Space Cleanup: Excluding Paragraphs in a Specified Font

In some documents, you might wish to run white space–related Cleanup features but exclude certain paragraphs from this type of cleanup. For instance, programming code often has intentional blank lines and intentional leading spaces on lines within it that should not be removed during Cleanup, although the rest of the document should have no blank lines. The same is true for verse and poetry, in which white space is often intentional and should be retained.

So that users don't have to forgo use of the white space Cleanup features entirely, eXtyles now allows users to specify that paragraphs in a specified font should not be affected by some of the white space–related Cleanup options. That is, you can set computer code in Courier and specify that paragraphs in Courier should not be affected by white space cleanup operations; you can set verse in a font such as Garamond and specify that paragraphs in Garamond should not be affected by white space cleanup operations.



To exclude or not to exclude:

The ability to exclude paragraphs from white space–related Cleanup features is optional. You may still run all Cleanup features on all paragraphs in your documents if you prefer, by leaving the Exclude Text in Font checkbox unchecked.

How to use

The following subset of white space Cleanup options may (optionally) be set to not run on paragraphs in a specified font:

- Convert Tabs to Spaces
- Remove Multiple Spaces
- Remove Start and End Paragraph Spaces
- Remove Blank Paragraphs

To use this feature, check your document for elements that eXtyles should skip when running these options. After Activation, eXtyles will automatically protect paragraphs that are in a constant-width font or that are correctly tagged with a paragraph style that is set in a constant-width font. You should check any verse/poetry paragraphs to make sure they're in a font that isn't used elsewhere in the document and apply such a font if necessary.

In addition, the paragraphs in question must be entirely in the excluded font: paragraphs in a mix of fonts will not be excluded from these Cleanup operations. For instance, if you have programming code paragraphs that contain both Courier and Courier New, select the whole code block and change the font to one of these fonts and then specify that font as the excluded font in the Cleanup dialog. Similarly, set the font of any verse or poetry sections that should not be affected by these options to a font that doesn't appear elsewhere in the document, and then specify the chosen font as the excluded font in the Cleanup dialog.

eXtyles will then not apply the white space–related Cleanup functions to paragraphs in the specified font, which means that tabs, extra spaces, leading and trailing spaces, and blank paragraphs will be retained for paragraphs that are in the specified font.

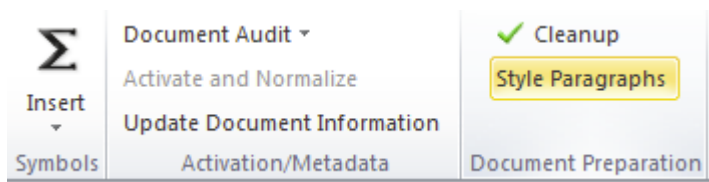
When you use the new feature and exclude paragraphs in the specified font, the Cleanup features Normalize Document and Auto-Style will also automatically skip paragraphs in the specified font, so that code or verse or otherwise protected paragraphs will not be tagged with your base paragraph style.

Monospace fonts

Authors sometimes apply a code (monospace) font instead of using a monospaced paragraph style. eXtyles protects these paragraphs from white space Cleanup as well.

During Activation, eXtyles checks the document for paragraphs that are in a monospace font but not a monospace-font paragraph style. eXtyles then applies a monospace-font paragraph style (HTML Preformatted) to exclude these paragraphs from the subset of white space operations during Cleanup. The HTML Preformatted paragraphs can then be styled as usual during the Style Paragraphs stage.

Paragraph Styling



Instead of manually applying a paragraph style to each paragraph via Word's menus or style list, you can use the eXtyles Style Paragraphs function to apply a set of styles from your template's paragraph styles to the document. The efficient style palette used in eXtyles lets you quickly and easily apply the correct styles to each individual paragraph. Each of your organization's paragraph styles is mapped to the eXtyles style palette, where it appears as a button. You can quickly traverse the document and confirm or change the style of each paragraph using the convenient "Undo", "Next", and "Previous" buttons.

How to use

To style the paragraphs of the document:

1. **Select Style Paragraphs from the eXtyles menu.** Styles in the eXtyles style palette are divided into multiple groups, which may be customized to fit your organization's styles. The set of palettes in eXtyles might include the following:
 - **Front:** covering front matter paragraphs
 - **Body:** covering paragraphs in the body of the document
 - **List:** covering list items
 - **Object:** covering boxes, tables, and figures
 - **Back:** covering back matter paragraphs

Common paragraph styles and their use can be found in the [eXtyles NLM Style Guide](#).

2. When the Paragraph Styles dialog appears, **select the desired tab and begin traversing the document, clicking the desired button to apply a style to the selected paragraph**, or clicking "Next" to advance to the next paragraph without changing the style of the selected paragraph.

The selected paragraph is highlighted in its entirety. After you click a style button to apply a style to paragraph, the highlight advances automatically to next paragraph.

You can also press the designated hot key—indicated by an underscored letter or number in the button's label—rather than clicking with the mouse. For example, you can press the "x" key on the keyboard instead of clicking "Next".

Skip to next unique paragraph

Hold Shift+X to skip all paragraphs tagged with the current paragraph's style, stopping at the next new paragraph style.

Use the following buttons at the bottom of the style palette to traverse the document:

Button	Function	Hotkey
		y

Next	Move to and select the next paragraph	X
Previous	Move to and select the previous paragraph	V
Delete	Remove the selected paragraph from the document and advance to the next paragraph	D
Undo	Undo the last operation (*see warning below)	U
	The "Undo" history is cleared when you click into the Word document or close the palette	
With prev	Merge the selected paragraph with the previous one (the carriage return between them is replaced with a space). Use this function to merge an unwanted heading into the paragraph following it, for instance, or if two paragraphs are separate but should be one.	W
New pgraf	Insert a return after the first sentence of the paragraph, creating two paragraphs from one.	G
	<p>New Pgraf</p> <p>This feature is designed primarily to allow faster formatting of run-in heads. The new paragraph will be created after the first period, colon, question mark, hyphen, or en dash that is followed by a space, or an em dash (in this case, regardless of a following space). To format a two-sentence head, select "New pgraf", apply the correct style for the heading, select "New pgraf" again, and then select "With prev". If a paragraph does not have more than one sentence, selecting "New pgraf" will not do anything.</p>	

Within this dialog, you can use the Tab and Shift-Tab keys on the keyboard to switch between the different style tabs on the palette. The Esc key will close the dialog.

Within this dialog, the Shift key will also change the behavior of certain functions. If you hold Shift while clicking "Next" or typing the hotkey "x," eXtyle will skip all paragraphs tagged with the current paragraph's style, stopping at the next new paragraph style. If you hold Shift while clicking the table body style for your palette, eXtyle will apply the table body style to the rest of the table.

The Paragraph Styles dialog closes automatically after the document is completely styled. If you need to close the dialog in the middle of processing, click the X box in the upper-right corner or press Esc. You can reopen this dialog at any time, and styling will continue with the paragraph where the cursor is currently located.

After you style a document, you can easily navigate through it by jumping from heading to heading using Word's Document Map feature. To use Word's Document Map feature, check the box in View > Navigation Pane.

Styling by hand

You can also use the Word paragraph style menu as usual if you are applying a paragraph style to just a few paragraphs. If you use this method, please keep these points in mind:

- The name on the eXtyle Paragraph Style palette is not necessarily the same as the name of the actual Word style.

Be sure to use the correct Word paragraph style.

- Word has a bug (Microsoft calls it a “feature”) in which italic or bold markup or Symbol font changes in the middle of a paragraph may be lost when styles are applied from the Word Paragraph Style menu or ribbon. This problem is especially nasty in genetics papers, in which a gene may inadvertently be turned into a protein as a result. If you use this method of styling, be sure to proof the paragraph carefully. Using the eXtyles Paragraph Style palette avoids this bug in Word.

Styling Tables

The buttons on the Object (or other customized name where your table styles are located) palette tab are used as follows.

- **Table Title:** Table number and table title.
- **Table Head:** Table head cells at the top of columns within the Word table.
- **Table Body:** Table body cells.
- **Table Footnote:** Table footnotes. This style also includes paragraphs, such as table legends, that fall after the table body and span the width of the table but are not cited from within the table as a table footnote.

The following table shows the correct location of each style:

Table 1. This is a table title. It may be located within the table grid or outside of it

Table Head A	Table Head B	Table Head C
Table Body*	Table Body	Table Body
Table Body	Table Body	Table Body

* This is a table footnote

For ease of table styling and to ensure that all paragraphs in the document are properly tagged, Inera recommends that table footnotes be placed after the table (i.e., outside of the table grid), as in the previous example, although this is not a requirement.

Applying Table Styles

eXtyles normally applies the selected style to a whole row of cells at once. To apply the selected style otherwise, use the modifier keys as indicated in the following table while pressing the relevant button on the palette:

Key	Function
(none)	Applies the specified style to an entire row (from the current cell to the end of the row).
Shift	Applies the specified style to the remainder of the table (from the current cell to the end of the row).
Control	Applies the specified style one paragraph within a cell at a time. If there is only one paragraph in a cell, this behavior is the same as Shift + Control.

Shift+Control	Applies the specified style to one cell at a time.
---------------	--

The Shift key is particularly useful when styling a table: as soon as you reach the point in the table at which all remaining cells are to be tagged as your table body style, for instance, you can hold down Shift and click on your table body style, and eXtyles will tag the rest of the table automatically!

Please note the following special information about styling tables with the eXtyles Paragraph Styling palette (as opposed to the regular Word Paragraph Style menu):

- When styling tables, empty cells are skipped.

Using the eXtyles cleanup feature to add non-breaking spaces to all empty table cells ensures that all table cells are correctly styled

- eXtyles preserves any of the following format information that was previously applied to each cell by an author:
 - Alignment (left, right, center, justify)
 - Indents (first line, left, right)
 - Tab stops

All of this information is respected during an eXtyles CALS or XHTML export.

- If the entire content of a cell is already in italic, bold, or underline, eXtyles will preserve this markup.
- If a paragraph style for a table cell specifies italic, bold, or underline markup, it will be applied to the entire content of the cell.

Complex Tables

Paragraph styles can be used to add specific formatting to table content. Your configuration's list style can be applied to an individual table cell that contains a list using the shift+control shortcut; or to an individual list paragraph within a cell using the control shortcut.

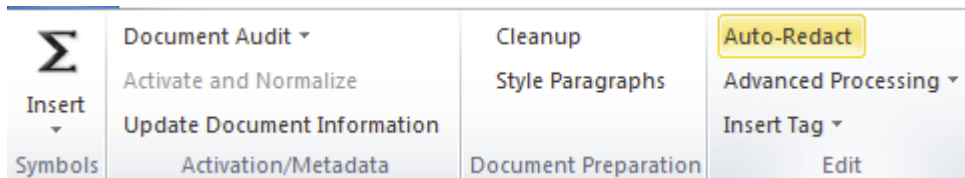
For tables that contain row headers mid-table, the table column head style should be applied, rather than table body.

Table Head A	Table Head B	Table Head C
Table Body*	Table Body	<ul style="list-style-type: none"> • List Level 1 • List Level 1
Table Body	Table Body	Table Body
Table Head	Table Head	Table Head
Table Body	Table Body	Table Body <ul style="list-style-type: none"> • List Level 1 • List Level 1

* This is a table footnote

Use the Control key to apply a style to one paragraph within a cell at a time. This is particularly useful for lists inside of table cells.

Auto-Redact



The eXtyle Auto-Redact function automates common, time-consuming Word edits so that editors and copyeditors don't have to waste time making repetitive or minor edits. The Auto-Redact function automatically performs a complex set of text substitutions in a document to bring it into compliance with your organization's predefined publication styles and standards.

Auto-Redact substitutions are based on user-defined rules. Your custom eXtyle configuration is based on detailed customer-specific information gathered at the time of installation. Rules related in some way to each other (for example, rules dealing with abbreviations of units of measure or rules that convert British spelling into American spelling) are assembled into eXtyle dictionaries. There are three categories of dictionaries:

- **General dictionaries**, which apply to all documents processed by eXtyle
- **Publisher-specific dictionaries**, which apply to all documents of a specific publisher
- **Publication-specific dictionaries**, which apply to all documents of a single publication within a publisher group (e.g., to a single journal within a publisher family)

eXtyle automatically loads the correct dictionaries based on the document information you have supplied during the activation and normalization process.

Auto-Redact is not available in eXtyle NLM configurations. For more information, please contact exstyles-support@inera.com.

How to use

To apply the Auto-Redact rules to a document:

1. Select Auto-Redact from the eXtyle menu/ribbon
2. Click OK to process the document. The dialog box similar to the one shown in the following figure will appear

eXtyle will automatically make a backup copy of your manuscript. Having a backup copy allows you to use Compare to Baseline immediately after Auto-Redact to review the changes that are made by eXtyle.

Do not edit the baseline comparison file (or the baseline file itself). The baseline comparison file is just for you to use for comparison purposes. Always make your changes in the working Word document. If the document title reads Compare Result 1 and there are changes tracked in the document, you're looking at a comparison document. If you want to adjust or reject one of the Auto-Redact changes, close or minimize the comparison document and make your edits in the working Word document.

Bibliographic Reference Processing and Validation

Bibliographies and References

eXtyles greatly reduces the time an editor must spend editing reference lists and bibliographies and helps ensure that your references are set up according to your organization's preferred style.



Explore this section

Bibliographic Reference Processing

Standards Validation

PubMed Reference Checking & Correction

Crossref Reference Checking & Correction

Duplicate Reference Checking

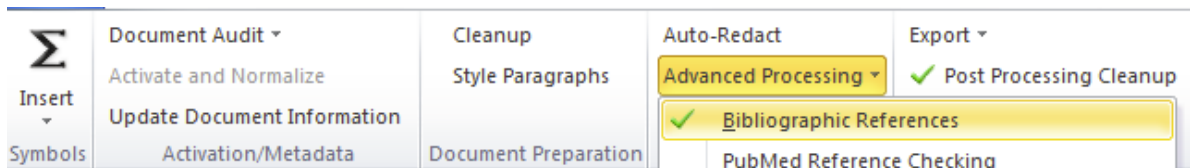
Reference Sorting

Journal Database Update

Questions? Comments?

Feel free to contact eXtyles Support at any time. Simply email us at eXtyles-support@inera.com or through our [Support Portal](#). We'll be happy to help!

Bibliographic Reference Processing



eXtyle greatly reduces the time an editor must spend editing reference lists and bibliographies and helps ensure that your references are set up according to your organization's preferred style. The Bibliographic References processing function automatically identifies a reference entry's type (journal, book, etc.) and restructures references based on your organization's publication style.

After you run the automatic processing via the Bibliographic References feature in eXtyle, author punctuation and style are replaced by the standard punctuation and style of an individual publication. This function can restructure most journal references (and book references, with the optional book processing module) that have no significant author errors with near-perfect accuracy. References that are not restructured are visually identified for manual editing.

How to use

Before running Bibliographic Reference Processing, confirm that all references are correctly styled and that Auto-Redact has been run.

1. Select Advanced Processing from the eXtyle Menu
2. Click Bibliographic Reference Processing

After reference processing, a typical journal reference looks like this:

`<jrn>`Klingensmith GJ, et al. Glucocorticoid treatment of girls with congenital adrenal hyperplasia: effects on height, sexual maturation, and fertility. *J Pediatr.* 1977;90:996-1004.`</jrn>`

The generic examples in this documentation are intended to illustrate various eXtyle features and will not exactly reproduce your organization's editorial style. Your eXtyle Bibliographic References processing is customized for your styles.

Reviewing References

Overview of Tagging and Character Styles

Each component of the reference is identified and color-coded for easy proofing. The first item is the reference type tag, which specifies the type of reference that eXtyle has identified. Reference Processing can style and tag (i.e., apply colored character styles and provide granular XML tagging) certain types of references. Please note that restructuring non-journal

references requires additional modules.

Possible reference types are:

Tag	Reference Type	Styled/Tagged	Restructured
<jrn>	Journal article	Yes	Yes
<bok>	Book	Yes*	Yes*
<edb>	Edited book or book chapter	Yes*	Yes*
<std>	Standard	Yes**	No
<conf>	Conference proceeding	Yes***	No
<eref>	Website or online article	No	No
<lgl>	Legal case or statute	No	No
<ths>	Thesis or dissertation	No	No
<other>	Working paper, patent, map, or other document	No	No
<unknown>	Unsupported or otherwise unknown reference type	No	No

*Tagging and restructuring book and book chapter references requires the additional Book Reference Processing module.

**Tagging standard references requires the additional Standard Reference Processing module.

***Tagging conference proceeding references requires the additional Conference Reference Processing module.

Contact eXtyles-support@inera.com to discuss how eXtyles can process your non-journal references!

Reference types might occasionally be incorrectly identified as “bok” or “unknown.” Misidentification is usually the result of a punctuation error by the author or a pattern that eXtyles does not support.

Each element in a reference entry is identified and tagged appropriately by eXtyles during Bibliographic References processing. The following table includes some examples of common reference components and their element names:

Element/Character Style	Example Text
bib_surname	Klingensmith
bib_fname	GJ
bib_article	Glucocorticoid treatment...
bib_journal	J Pediatr
bib_year	1977

bib_volume	90
bib_fpage	996
bib_lpage	1004

References appear in the correct style (element order, face markup, and punctuation) of the publication selected in the Document Information dialog.

If appropriate for your organization, in addition to fixing the order, punctuation, and face markup of references, eXtyles also corrects the abbreviation of journal names so that they match editorial style and standard abbreviations used for online linking. Punctuation is added or removed according to your chosen publication style.

Viewing References

If necessary, use the View Tags/Hide/Show Tags function to turn display of reference type tags (<jrn>, <bok>, etc.) on and off. Do not delete the tags because they carry important information used by other functions on the Advanced Processing menu.

Reference Processing Query Insertion

If eXtyles adds queries (which appear as Word comments) during journal reference processing, an alert will appear after processing is complete to indicate the number of queries added. No alert is shown when queries have not been added. You can view or hide queries via the Review ribbon > Show Markup > Comments.

Depending on your configuration, the following conditions can cause eXtyles to add queries during journal reference processing:

- A journal title is found that is not in the eXtyles journal title database
- The first page number is greater than the last page number
- A reference has only a first page number and not a last page number
- A reference has a page range of more than 100 pages
- Too few authors appear before “et al.”
- “Et al.” used in a publication whose style does not permit it
- The reference does not have an article title

These warnings may or not appear in your organization's specific eXtyles configuration.

Many of the warning messages inserted by Reference Processing are customizable! Contact eXtyles-support@inera.com to learn more.

Troubleshooting

- **eXtyles didn't recognize your journal title?** Send the title to journals@inera.com so we can integrate that title into our [Journal Database](#).
- **eXtyles didn't recognize or mis-tagged your reference?** Try [manually editing and reprocessing](#) your reference.

Reference Types

eXtyles Bibliographic Reference Processing is very good at restructuring references that already have a decent structure. Your

original references may not be in the editorial style that you want; they may not be consistent; they may not even be accurate; but if your references have enough recognizable pieces of information, then eXtyles may be able to do all the tedious restructuring for you. For example, journal article references tend to be rather uniform in structure, and this means that eXtyles does a great job of restructuring and correcting them.

Please see the table below for the reference types that eXtyles Reference Processing can currently tag and restructure:

Tag	Reference Type	Styled/Tagged	Restructured
<jrn>	Journal article	Yes	Yes
<bok>	Book	Yes*	Yes*
<edb>	Edited book or book chapter	Yes*	Yes*
<std>	Standard	Yes**	No
<conf>	Conference proceeding	Yes***	No
<eref>	Website or online article	No	No
<lgl>	Legal case or statute	No	No
<ths>	Thesis or dissertation	No	No
<other>	Working paper, patent, map, or other document	No	No
<unknown>	Unsupported or otherwise unknown reference type	No	No

*Tagging and restructuring book and book chapter references requires the additional Book Reference Processing module.

**Tagging standard references requires the additional Standard Reference Processing module.

***Tagging conference proceeding references requires the additional Conference Reference Processing module.

Journal References

Reference Processing function can restructure most journal references (and book references, with the optional book processing module) that have no significant author errors with near-perfect accuracy. References that are not restructured are visually identified for manual editing.

After reference processing, a typical journal reference looks like this:

<jrn>Klingensmith GJ, et al. Glucocorticoid treatment of girls with congenital adrenal hyperplasia: effects on height, sexual maturation, and fertility. *J Pediatr.* 1977;90:996-1004.</jrn>

Book and Conference Proceedings

If your configuration of eXtyles also includes the book and conference proceedings processing add-in modules, eXtyles Reference Processing will also automatically process non-journal references such as books and conferences. After

Bibliographic Processing is run, a typical book reference looks like this:

```
<bok>Gibbs AJ, et al. Molecular Basis of Virus Evolution. Cambridge, UK: Cambridge University Press; 1995.</bok>
```

If you do not have the module for book processing, non-journal references such as books are partially processed. eXtyles identifies the type of non-journal reference and highlights the authors and year. Non-journal references include books as well as references that cite conferences, working papers, unpublished theses, and other works. The following examples show how typical book, edited book, and electronic references appear after Automatic Reference Processing without the book processing module:

```
<bok>Gibbs AJ, et al. Molecular Basis of Virus Evolution. Cambridge, UK: Cambridge University Press; 1995.</bok>
```

Both the reference type tag (such as <bok> or others that aren't <jrn>) as well as the lesser degree of color can easily be used to identify non-journal references. Only the authors and year will be highlighted. The rest of the reference is not highlighted.

Reference numbers and authors in books, edited books, "other," and electronic references are cleaned up according to your chosen publication style. Authors in unknown references are not altered. No other automatic reformatting is done to non-journal references unless your organization has purchased this feature. All additional editing of non-journal references must be done manually. See [Manual Editing and Reference Reprocessing](#) in the next section for more information.

As a general rule, all non-highlighted reference text must be carefully reviewed and manually edited. Highlighted text must also be carefully reviewed, but with the exception of article titles, which eXtyles does not alter, it probably will not require further editing.

Standard References

Bibliographic Reference Processing identifies standard citations that occur as part of a bibliography or non-normative reference list and wrap them in the eXtyles tag <std>, indicating a standard citation.

This module then applies character styles to standard citations. These character styles, which have the prefix "std_", have several functions. First, they indicate how eXtyles has identified the elements of the citation—for example, the character style "std_publisher" applied to "ISO" (ISO) indicates that eXtyles considered that element of the citation to be the publisher of the corresponding standard. An editor may verify that eXtyles properly identified the citation elements by checking that the correct character styles were applied to each part of the citation. Second, these character styles represent semantic information added to the document that may be used later in processing, such as by the eXtyles Export filter in producing enriched XML. Because the character styles serve as a proxy for tagging, they should not be removed from a document that will be exported to XML; however, they should be edited if they have been incorrectly applied.

After reference processing, typical standard references look like this:

Normative references

ISO 4254-1:2008, Agricultural machinery—Safety—Part 1: General requirements

Bibliography

<std>ISO 5725-2, Accuracy (trueness and precision) of measurement methods and results—Part 2: Basic method for the determination of repeatability and reproducibility of a standard measurement method</std>

Only references to standards from publishers with known designation formats (e.g., ISO, IEC, EN, BSI, DIN) are reformatted. References to standards from other publishers (e.g., ASTM, IEEE) have their elements tagged (i.e., identified with character styles), but no reformatting is done to avoid introducing errors in designations.

Manual Editing and Reference Reprocessing

Once a reference has been tagged with a type (e.g., <jrn>, <unknown>), it will not be reprocessed if you rerun Advanced Processing > Bibliographic References. eXtyle ignores tagged entries on successive passes of this function. If you wish to reprocess a reference after making some changes to it, you can remove the reference type tag. For example, the following reference failed to process correctly due to the double punctuation after the volume number:

<unknown>Janmey, P. A. “Protein regulation by phosphatidylinositol lipids.” Chemistry & Biology 2;:1 (1995): 61–65. </unknown>

You can fix the punctuation manually—that is, delete the extra colon after the volume number—and then remove the reference type tags (by backspacing over the tag, or by selecting the tag and cutting it with Control-X) so that the reference looks like this:

Janmey, P. A. “Protein regulation by phosphatidylinositol lipids.” Chemistry & Biology 2;1 (1995): 61–65.

After selecting the Bibliographic References menu item again, the reference will be properly restructured as shown here:

<jrn>Janmey PA. Protein regulation by phosphatidylinositol lipids. *Chem Biol.* 1995;2(1):61-65.</jrn>

Hiding the reference type tags is not the same thing as deleting them. To reprocess a reference, you must actually delete the tags at the start and end of a reference. Hiding them with the View Tags/Hide Tags menu item will make the tag disappear on screen, but it will not cause a reference to be reprocessed.

Do not copy reference type tags from one reference and paste them onto another reference. These tags may be applied only automatically by Bibliographic References processing or by using the Insert Tags option on the eXtyles menu. Copying and pasting these tags may cause failures in other Advanced Processing operations.

Errors can be fixed even without removing the colored highlights and styles. Bibliographic References processing removes all highlighting before reprocessing a reference. Colored highlights and styles are reapplied before the results of the Bibliographic References processing function are displayed on screen.

Character Styling References

When references are processed by eXtyles, Word character styles such as bib_article, bib_journal, and so on are automatically applied to each part of the reference text. If you manually edit a reference after reference processing, be sure that the character styles are correctly applied to the edited text. These character styles can be applied just like any other character styles in Word, that is, via Word's Styles feature (in Word 2010, access this menu via Home > Styles or press Control-Alt-Shift-S).

In some unusual cases, even when a reference is correctly copyedited, eXtyles may fail to process it correctly. In such cases, you should edit the reference by hand and then apply the character styles directly from the Word Style feature.

The character styles should be applied only to the actual content that is typically highlighted, not to surrounding punctuation. For example, if your organization's style includes parentheses around the year of publication, apply the bib_year character style to just the year itself, such as (1995), and not to the surrounding punctuation.

More information about bibliography-specific character styles can be found in the eXtyles NLM Style Guide: [Bibliography Styles](#)

Standards Validation

Once Bibliographic Reference Processing and Inline Standards Citation Matching have applied tags and character styles to standard references and inline citations, the Standards Validation feature can validate those citations against a web-based service (e.g., ISO standards against an ISO web service, EN standards against a CEN web service for CEN members).

The response from this query server is used to update or provide information about the state of the standard being cited. The matching/linking module will attach Word comments to standard references and citations according to a defined set of response codes returned by the citation query server. Note that, regardless of the server response code, eXtyles automatically reformats standard citations—for example, updating the two hyphens in “ISO 12100:--” to the em-dash in ISO 12100:—.

Queries

Following is a list of the comment text added by eXtyles to a problematic citation, the response codes, and a description of the behavior undertaken by eXtyles during validation.

[No comment] (MATCH).

The citation occurring in the manuscript is matched to a single standard by the query server, and no comment is added. Note that the formatting and punctuation of the citation may still be adjusted.

“OK with auto corrections” (MATCH_WITH_CORRECTIONS).

The citation occurring in the manuscript is matched to a single record by the query server, but it is not an exact match. The citation in the manuscript is updated automatically using the data returned by the server. Additionally, formatting and punctuation in the citation may be adjusted.

“The reference is to a withdrawn standard which has been replaced” (MATCH_NEWER_EDITIONS).

The citation occurring in the manuscript is matched to a single record by the query server, but the corresponding standard has been withdrawn and replaced by a newer standard. No change is made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“The reference is to a withdrawn standard” (MATCH_WITHDR).

The citation occurring in the manuscript is matched to a single record by the query server, but the corresponding standard has been withdrawn. No change is made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“Not publicly available, {0}” (MATCH_NOT_PUBLIC), where the placeholder “{0}” stands for the current stage of the standard as returned by the query server.

The citation occurring in the manuscript is matched to a single record by the query server, but the corresponding standard is not currently available. No change is made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“Not found, but similar references exist” (NO_MATCH_WITH_PROPOSALS).

The citation occurring in the manuscript is not matched to a single record by the query server, but the server returns several proposed matches, which are listed in the comment. No changes are made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“Project canceled” (NO_MATCH_PROJECT_CANCELED).

The citation occurring in the manuscript is matched to a single record by the query server, but the corresponding standard has been canceled. No changes are made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“Not found” (NO_MATCH).

The citation occurring in the manuscript is not matched to an existing standard by the query server. No changes are made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“Invalid reference” (ERROR_INVALID_BIBL).

The citation occurring in the manuscript is not considered to be a standard citation by the query server. No changes are made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“The originator of the reference is unknown and cannot be validated” (ERROR_UNKNOWN_PUBLISHER).

The citation occurring in the manuscript cites a standard to a publishing body not supported by the query server, such as “EN” or “IEC”. No changes are made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

“Validation service returned error: {0}” (ERROR_SERVICE), where the placeholder “{0}” stands for the error message returned by the server.

The query service encountered an unhandled error attempting to match the citation occurring in the manuscript. No changes are made to the text of the citation in the manuscript, although the formatting and punctuation may be adjusted.

PubMed Reference Checking & Correction

How many times have you published an article online only to discover that some references did not have valid links to the NLM PubMed database? eXtyles PubMed Reference Checking can help eliminate this problem by calling the PubMed batch citation checker for all journal references. In addition to providing links to cited content, Reference Checking can insert or repair missing or incorrect reference elements with data pulled from PubMed. Depending on your eXtyles configuration, you may run the PubMed Reference Checking process in either **Checking** or **Correction** mode.

In Checking mode, this process will insert a warning if eXtyles identifies a discrepancy between the reference and the PubMed record. In Correction mode, eXtyles will intelligently merge correct data from PubMed with your reference.

Are data from PubMed always reliable?

Learn more [here!](#)

How to use

To run PubMed Reference Checking or Correction on a document:

1. Complete Bibliographic Reference processing, including the cleanup and reprocessing of all references that eXtyles did not automatically fix.
2. Select eXtyles > Advanced Processing > PubMed Reference Checking/Correction.

PubMed Reference Checking/Correction should take approximately 30 seconds for 60 references.

Make sure you are connected to the Internet.

Reviewing Comments

PubMed Checking/Correction Comments

PubMed Reference Correction adds missing data and intelligently merges any revisions with existing data, providing warnings where significant discrepancies are found. For example, for this reference:

```
<jrn>141. Mullins R, et al. Ocular drusen contain proteins common to extracellular deposits associated with atherosclerosis, elastosis, amyloidosis, and dense deposit disease. FASEB J. 2000;14:835-846. PubMed</jrn>
```

PubMed Reference Correction returned the following comment:



eXtyles PubMed Check

eXtyles has not updated ref. 141 "Mullins, et al, 2000" because the article title in Medline significantly differs from the author's original. The Medline reference is Mullins RF, Russell SR, Anderson DH, Hageman GS. Drusen associated with aging and age-related macular degeneration contain proteins common to extracellular deposits associated with atherosclerosis, elastosis, amyloidosis, and dense deposit disease. *FASEB J.* 2000;14(7):835-846

Because PubMed's article title differed significantly from the title provided by the author, a comment was inserted indicating that the reference had not been automatically corrected. However, the corrected reference is provided in the comment body, fully edited and color coded, and can be copied and pasted into the Word document if, after review, the editor has determined that it is correct.

Categories of comments that may appear during PubMed Reference Correction include:

- **The reference is not corrected, and a comment is inserted.** The previous reference is an example of this; the article titles provided by the author and PubMed differed enough that eXtyles deemed it unsafe to make any changes to the reference. The corrected reference or reference element is provided in the comment.
- **The reference is partially corrected, and a comment is inserted.** An example of this issue is a reference in which a missing volume number was inserted according to the PubMed data, but the PubMed article title was set in all caps. Because of this formatting eccentricity, even if there is a discrepancy in the titles, eXtyles will not merge in PubMed's data. The unmerged data will instead be included in the comment.
- **The reference is corrected, and a comment is inserted.** In this case, the reference is updated, but because the change is noteworthy and might require review, the author's original text is included in the comment. For example, for this reference:

<jrn>168. Elnor SG, Elnor VM, Pavilack MA, et al. Modulation and function of intercellular adhesion molecule-1 (CD54) on human retinal pigment epithelial cells. *Lab Invest.* 1992;66(2):200-211. PubMed</jrn>

PubMed Reference Correction returned the following comment:



eXtyles PubMed Check

The title in ref. 168 "Elnor, Elnor, Pavilack, et al, 1992" was updated, but differs from the author's original: Modulation and function of intracellular adhesion molecule-1 (CD54) on human retinal epithelial cells.

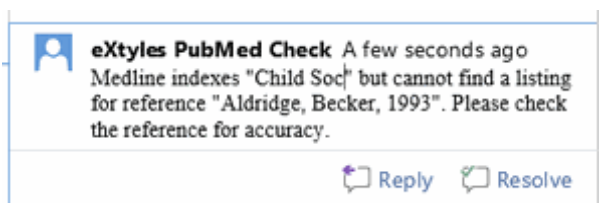
For reference corrections that do not require editorial review, the changes are made automatically and no comments are inserted.

Linking Comments

A Word comment is inserted after each reference that fails to match the PubMed database. For example, the following reference:

<jrn>Aldridge J, Becker S. Punishing children for caring: the hidden cost of young carers. *Child Soc.* 1993;7(4):376-387.</jrn>

was not found on PubMed. The following comment was added:



With this information, the editor can query the author. Alternatively, the editor can resolve the problem by checking directly on PubMed.

Messages that may appear as a result of a failure to link to PubMed include:

- **PubMed does not recognize the journal name.** This message typically appears when PubMed does not index a particular journal, but it may also indicate a significant problem with the journal title that eXtyle Bibliographic Processing was unable to correct.
- **PubMed cannot find an abstract for the reference.** This message appears when PubMed indexes the journal but there is a problem somewhere else in the reference information (first author name, volume, year, or first page). It will also appear for references that are older than PubMed indexes.
- **PubMed reports the reference matches multiple abstracts.** This message appears in situations of ambiguous data.

To manually determine the reason a message was inserted, you can use the PubMed single citation matcher, located at <http://www.ncbi.nlm.nih.gov/pubmed/citmatch>.

Insertion of Abstracts by PubMed Reference Correction

The eXtyle PubMed Reference Correction module can be configured to insert abstracts after references that link to PubMed. If preferred by your organization, these abstracts can be inserted as "hidden text," meaning that the user can toggle between hidden and visible text in Word to show and hide the abstracts, and they can be supported as annotations to references when exported to NLM DTD XML.

Please contact Inera at eXtyle-support@inera.com if you are interested in incorporating this feature into your eXtyle configuration.

Troubleshooting

Sometimes you might receive a message that eXtyle was unable to contact the PubMed website. If you get this message, try again in a few minutes. If the problem persists, please check with your eXtyle or network administrator.

Crossref Reference Checking & Correction

Crossref is an official DOI registration firm that functions as a cooperative cross-publisher collaboration to enable accurate and useful citation linking via DOIs (Digital Object Identifiers). A DOI is an identifier that is unique for each content item and that does not change with time.

Crossref Reference Checking works in much the same manner as [PubMed Reference Checking & Correction](#), with these exceptions:

1. Crossref Reference Checking informs you of the number of references that match rather than the number that failed to match. This approach has been taken because the Crossref database is significantly smaller and may result in large numbers of unmatched references.
2. Crossref Reference Checking is usually set up with fuzzy matching turned on. In most cases, the results are quite good, but occasionally incorrect results occur. In all cases in which a match is made with fuzzy matching, you will receive a warning that the reference data and the Crossref data do not match.
3. Crossref Reference Checking may have been configured for your organization to automatically insert the DOI as a hyperlink in the reference section. This insertion makes it easy to identify which references have been matched on Crossref.

Are data from Crossref always reliable?

Learn more [here!](#)

How to use

To run Crossref Reference Checking on a document:

1. Complete Bibliographic Reference processing, including the cleanup and reprocessing of all references that eXtyle did not automatically fix
2. Select eXtyle > Advanced Processing > Crossref Reference Checking

Crossref Reference Checking should take approximately 30 seconds for 60 references.

Be sure you have a connection to the Internet.

Crossref Correction Mode

If your organization has upgraded Crossref Checking to Crossref Correction, this module will intelligently mark and merge discrepancies between your reference and the Crossref record. Crossref Correction includes these additional features:

Crossref Reference Correction is typically run in Add mode, rather than Add and Merge mode.

In Add mode, Reference Correction adds missing data (e.g., additional author names or missing volume or page numbers). Add mode does not attempt to correct existing data (e.g., article titles) supplied by the author.

Though Crossref Reference Correction runs in Add mode, it will still insert comments about discrepancies in author names, article titles, and so on.

For instance, for this reference:

```
<jrn>Zhang S, et al. Demonstration of near-infrared negative-index materials. Phys Rev Lett. 2005;95:137404.  
doi:10.1103/PhysRevLett.95.137404</jrn>
```

Crossref Reference Correction returns the following comment:



eXtyle CrossRef Check

eXtyle has not updated ref. "Zhang, et al, 2005" because the article title in CrossRef significantly differs from the author's original. The CrossRef reference is Zhang S, Fan W, Panoiu NC, Malloy KJ, Osgood RM, Brueck SRJ. Experimental Demonstration of Near-Infrared Negative-Index Metamaterials. *Phys Rev Lett.* 2005;95(13):137404

If the reference returned by Crossref is correct, the user can easily paste in the relevant portion or the entire reference. Note that in the previous example, Crossref indexes the article title in title case rather than sentence case, so the editor may opt to manually edit the reference instead.

Troubleshooting

A DOI inserted by Crossref Linking resolves to a broken link?

[Learn what to do in our FAQ!](#)

Duplicate Reference Checking

The eXtyles Duplicate Reference Checking module warns users when two references with identical or near-identical content appear in a single reference list. It catches duplicates even when the formatting or order of elements in the two references differs, and it is especially useful for review articles or other long manuscripts with hundreds of references.

How to use

To run Duplicate Reference Checking on a document:

1. Run Bibliographic Reference Processing.
2. Select Duplicate Reference Checking; when the process is complete, the number of duplicate references will be listed in a warning dialog and each reference will be flagged with a Word comment.

Duplication errors must be resolved manually through deletion of references and consolidation of in-text citations.

Reference Sorting

For publications that use Harvard-style (i.e., name–date) citations, eXtyle Reference Sorting can be run after Bibliographic Reference Processing to sort reference lists alphabetically and according to the editorial style recommended by the APA (American Psychological Association), Chicago (Chicago Manual of Style), CSE (Council of Science Editors), Cell Press, and SGM style guides.

APA, Chicago, and CSE Styles

For publications that use APA, Chicago, or CSE style guides, Reference Sorting will follow these conventions:

- Author surname parts such as “van” or “la” are included as part of the surname (i.e., they are not grouped with the author initials).
- Alphabetization is word by word (e.g., “Van Stronheim” will be listed before “Vanstone”).
- “Mc” and “St.” are alphabetized as typed, not as if spelled out as “Mac” and “Saint”.
- Jr., Sr., III, and other suffixes are ignored during the sorting process.

Cell Press and SGM Styles

Alternatively, Reference Sorting can be used to reorder reference lists alphabetically and according to the editorial style used by Cell Press and the Society for General Microbiology (SGM). This latter style follows the following rules for ordering references with the same first-author surname:

- All single-author references are listed, subsorted by year and then year letter (e.g., 2006a).
- All two-author references are then listed, subsorted by second author surname, then by year, and then by year letter.
- All references with three or more authors are listed, subsorted by year.

When ordering references with different first-author surnames, the following alphabetization conventions apply:

- Author surname parts such as “van” or “la” are included as part of the surname (i.e., they are not grouped with the author initials).
- Alphabetization is word-by-word (e.g., “Van Stronheim” will be listed before “Vanstone”).
- “Mc” and “St.” are alphabetized as typed, not as if spelled out as “Mac” and “Saint”.
- Jr., Sr., III, and other suffixes are ignored during the sorting process.

How to use

Can't find Reference Sorting on the menu?

Depending on your organization's configuration, this process may also appear on the Advanced Processing menu as Sort Name-Date References.

To use Reference Sorting:

1. Run eXtyle at least up through Bibliographic Processing. Sorting will not work on unprocessed references. We recommend, however, that sorting be run after PubMed/CrossRef Checking, where it appears on the Advanced Processing menu.

2. The sorting results will be more accurate if all reference author lists are correctly identified by eXtyles. Therefore, we recommend that any problematic unknown or misparsed references be corrected and reprocessed before Reference Sorting is run.
3. Select eXtyles > Advanced Processing > Reference Sorting. eXtyles will sort your reference list according to one of the two styles described previously, as configured according to your organization's preference.

If the order of two or more references is ambiguous (for instance, if there are three "Smith J, 2000" references), Reference Sorting will insert a warning.

Journal Database Update

The Journal Database Update tool downloads the latest version of the journal database files from extyles.com and saves them to your Temp directory. The most up-to-date versions of these files are then used during eXtyles Reference Processing.

Your eXtyles configuration may be set to update the journal database files manually, automatically, or never. If your journal database tool is set to automatically update daily, weekly, or monthly, you can still update the database manually through the About box.

If your configuration is set to never update the journal database, the option to update your journal database will not be available in the About box.

How to use

To update your journal database manually:

1. Click the About button on the eXtyles ribbon to open the About eXtyles dialog.
2. Click Update Journal Database to download and update your journal database files.

You must have the Bibliographic Reference Processing module for this tool to be available. You must also be connected to the Internet to use this tool.

Automatic Updates

Automatic updates are triggered by Bibliographic Reference Processing. When you run Reference Processing, eXtyles first checks to see whether automatic updates are enabled and the schedule for those updates (e.g., Daily, Weekly, or Monthly). Then eXtyles checks the date of the last update from a stored setting. If the date of the last update is older than the date prescribed by your update schedule, eXtyles will automatically run the update process before continuing to process your bibliographic references.

Regardless of your automatic update settings, you can easily check the date of your last journal database update in the About eXtyles dialog.

Want to know more about the Journal Database? Where do our journal titles come from, anyway? Learn more here: [What Happens to All those Journal Titles](#)

Citations

Citations

eXtyles automates the lengthy process of formatting citations to your editorial style and matching in-text citations with their references.



Explore this section

[Convert/Clean Numbered Citation Style](#)

[Citation Matching](#)

[Inline Standards Citation Matching](#)

[Check Numbered Citation Order](#)

[Citation Renumbering](#)

[Harvard-to-Vancouver Citation Conversion](#)

[Table Footnote Matching](#)

Questions? Comments?

Feel free to contact eXtyles Support at any time. Simply email us at exstyles-support@inera.com or through our Support Portal. We'll be happy to help!

Convert/Clean Numbered Citation Style

Convert/Clean Numbered Citation Style has three functions:

1. It automates the conversion of numbered (Vancouver) style citations between different standard styles. Standard styles include brackets (e.g., “[2]”), parentheses [e.g., “(3)”], or superscript numbers (e.g., “experiment.4”), or some combination thereof.
2. It cleans up formatting of spacing and punctuation in numbered (Vancouver) style citations for all citation styles.
3. It cleans up the punctuation surrounding the citation (e.g., converts “citation1.” to “citation.1” or vice versa) depending on your journal requirements. Punctuation is cleaned up for periods, commas, colons, and semicolons. Other punctuation, including surrounding quotes, require manual cleanup because the correct order may be context-dependent.

Convert/Clean Numbered Citation Style should be run even if the author used the correct citation style for the journal so that it can clean up formatting of the numbers in citations (e.g., changing “[1, 3-5]” with a hyphen to “[1,3–5]” with an en dash).

How to use

To use Convert/Clean Numbered Citation Style:

1. Run eXtyles up through the [Bibliographic Reference Processing](#) function. Pay special attention when styling paragraphs to make sure that there are no extra returns in the middle of references, as extra returns in references will cause problems for both bibliographic reference processing and citation processing.
2. Visually check the document to note the citation style the author used (e.g., numbers in square brackets, numbers in parentheses, etc.).
3. Select eXtyles > Advanced Processing > Convert/Clean Numbered Citation Style. You will see a dialog asking you to select the bibliographic citation style used by the author.
4. Select the appropriate style and click OK.

eXtyles has been set up with the correct citation style of your publication, so there is no need to enter this information.

Convert/Clean Numbered Citation Style should not be used in documents with Name/Date (Harvard) style citations until after Harvard-to-Vancouver Citation Conversion has been run on the document.

Citation Matching

Citation Matching automates the lengthy process of comparing and matching in-text citations with their references, including bibliographic reference entries as well as objects such as figures, tables, and boxes that are called out within the text.

In addition to matching citations and callouts with their references and objects, Citation Matching performs the following tasks automatically:

- Identifies all in-text bibliographic citations for which there is not a matching reference entry.
- Identifies all reference entries for which there is not at least one in-text citation.
- Identifies all figure, table, box, section, and appendix callouts for which there is not a matching figure, table, box, section or appendix title.
- Identifies all figure legends, box legends, table titles, and footnotes (unlinked and plain text) for which there is not at least one callout.
- Identifies all section numbers for which there is not at least one callout.

Each of these issues, if it occurs, is automatically indicated in your document with the insertion of an author query. Author queries are inserted as Word comments and may be displayed by ensuring that there is a check mark in Review > Show Markup > Comments. In Print view, they usually appear as balloons to the right of your screen. In Draft view, they appear in a box at the side or bottom of the page. The actual citations and callouts in the manuscript are indicated with color coding to aid in proofing.

How to use

To use Citation Matching:

1. Run eXtyles up through Convert/Clean Numbered Citations.
2. Look at the body of the document and determine the citation style that now appears in the document (e.g., name-date, numbers in brackets, etc.).
3. Select eXtyles > Advanced Processing > Citation Matching. You will see a dialog asking you to select the bibliographic citation style used in the document. Select the appropriate style and click OK.

For organizations that do not include bibliographic references, select "No References; match objects (figures, tables)" to run Citation Matching on objects only.

Citation Matching Queries

If eXtyles adds queries during Citation Matching, an alert will appear after processing is complete to indicate the number of queries added. An alert is shown when queries have not been added to indicate that Citation Matching completed successfully. You can view queries by opening the Word Comments window from the Word View menu.

Citation Matching Failures

Citation Matching automatically applies the character style cite_bib to all reference citations in text. Occasionally, eXtyles will fail to automatically apply this style during Citation Matching. In such cases, the character style "cite_bib" should be applied by

hand from the Word Styles menu (Home > Styles).

Common Causes of Query Insertion

Queries may be inserted for many reasons. In this section is a list of explanations for common queries that you might encounter.

Figure and Table Matching

Citation to another article: Citation Matching incorrectly sees citations to figures and tables in other articles, such as “See figure 1 in Smith (1999)”, as part of the current article. Queries about such citations are incorrect and should be removed by deleting the Word comment containing them.

Incorrect styling: Citation Matching relies on correct styling of paragraphs. Please make sure the figure legends and table titles are styled correctly if you see erroneous queries.

Harvard (Name-Date) Citation Matching

Incorrect spelling: If a name is misspelled, a match will not be made. Be sure to look at all names (not just the first) and accented characters.

Incorrect character: For names with apostrophes, make sure the same type of apostrophe is used in both the citation and the reference. For example, “D’Aria” is not the same name as “D'Aria” (one uses a right single quote, and the other an apostrophe).

Incorrect date: If the dates are not identical, a match will not be made.

Incorrect author processing: If authors in a reference have names that Bibliographic References is unable to correctly process, the reference will be given a type of <unknown>. If the highlighting of the authors is incorrect in the reference, but the names and dates are correct, such queries are erroneous and should be removed by deleting the Word comment containing them.

Mismatch in number of authors: If the number of authors found in the reference does not match the citation style, then no match will be made. The following cases will not match and will cause a query to be inserted:

Reference	Incorrect Citation	Reason
Smith, A. (1999) Article Title...	(Smith and Jones, 1999)	Only one author is listed in the reference, but the citation indicates two authors
Smith, A. (1999) Article Title...	Smith et al., 1999)	Only one author is listed in the reference, but the citation indicates at least three authors
Smith, A. and Jones, B. (1999) Article Title...	(Smith, 1999)	Two authors are listed in the reference, but the citation indicates only one author

Smith, A. and Jones, B. (1999) Article Title...	(Smith et al., 1999)	Two authors are listed in the reference, but the citation indicates at least three authors
Smith, A., Jones, B., and Lee, C. (1999) Article Title...	(Smith, 1999)	Three (or more) authors are listed in the reference, but the citation indicates only one author
Smith, A., Jones, B., and Lee, C. (1999) Article Title...	(Smith and Jones, 1999)	Three (or more) authors are listed in the reference, however the citation indicates two authors

Initials included in citations: Citations that include author initials will not be handled correctly. For example, “See A. Smith and B. Jones (1999)” will not be matched. It must be edited as “See Smith and Jones (1999)”. If this style creates conflicts with multiple references, letters (1999a and 1999b) should be added.

Active citations: Active citations in text—such as “Smith and Jones, 1999, proved in their experiment”—will not be matched. Either the entire citation or the year must be enclosed in parentheses (or [brackets] if nested inside parentheses).

Numbered Citation Matching (any style)

All numbered (Vancouver) style citations share some similar characteristics. In order for Citation Matching to work correctly, please observe the following rules:

Reference numbering:

- All references must be numbered in sequential order.
- There may not be any unnumbered references.
- All citations must use the same numbered style.

Multiple numbered reference lists in a single document: Occasionally, editors will have multiple numbered reference lists within a single Word document. If this occurs (usually due to a letter and a reply), contact Inera about how to handle this situation.

Blank lines: No empty paragraphs are allowed in the reference section.

Extra returns: Make sure that each reference is contained in a single paragraph. Extra returns in the middle of a reference will cause problems.

Inappropriate leading text: Within brackets or parentheses, most text preceding numbers will cause failures. Exceptions are the common words “e.g.”, “see”, “ref”, “refs”, and “reference”.

Inappropriate trailing text: After the first number, additional text about pages, tables, figures, or an appendix is permitted. If other text is found, the number inside of brackets or parentheses is not treated as a citation, as in “(8-12 m)”.

Numbered Superscript Citation Matching

In addition to the characteristics listed in this section for all numbered citations, eXtyle carefully checks superscript numbers

to ensure that they are citations and not part of mathematical expressions:

Superscript 2 and 3: Superscript 2 and 3 appear so often in simple inline math that they are handled as special cases. These superscripts are treated as a citation only if they are immediately preceded by punctuation or they are part of a citation range. The following two examples are valid citations: “This is a simple citation.²” and “This is a simple citation range.^{2–4}”

Accepted superscript numbers: The following cases are always assumed to be citations:

- Punctuation immediately prior to a superscript number
- A word of four letters or more immediately prior to a superscript number

Rejected superscript numbers: The following cases are always assumed not to be citations:

- A single italic letter immediately prior to a superscript number
- Any Greek letter immediately prior to a superscript number
- The number “10” immediately prior to a superscript number, as this is typically a number raised to a power of 10 (e.g., 10⁷)
- Any mathematical character (such as +, –, or /) immediately prior to a superscript number

Inline Standards Citation Matching

The Standard Citation Matching feature identifies and applies character styles and Word comments to in-text citations to standards. This styling can be seen in paragraph 5.1.1 in the following example:

5.1.1 Machinery shall comply with the safety requirements and/or protective measures of this clause. In addition, the machine shall be designed in accordance with the principles of ISO 12100:—, Clause 4, for hazards relevant, but not significant, which are not dealt with by this part of ISO 4254.

4 Normative references

<std>ISO 4254-1:2008, *Agricultural machinery—Safety—Part 1: General requirements*</std>

Normative Reference Citation Checking

This feature also verifies that all normative references in a standard have at least one corresponding in-text citation. In other words, it checks whether a normative reference is cited, but it does not check whether a cited standard is included in the normative references list. This is because not all cited standards in a document are necessarily normative references. When Standard Citation Matching cannot find a corresponding in-text citation for a normative reference, eXtyles inserts a warning for the normative reference; for example:

eXtyles Normative Reference Citation Check reports that the normative reference “ISO 4253:1993” is not cited in the text.

This feature also verifies citations to specific parts of normative references. According to best practice, citations to a specific part of a standard should always include the year of publication. If an in-text citation references a specific part of a standard (e.g., “ISO 9001, Table 2”) but does not include a year, eXtyles inserts a warning, for example:

eXtyles reports that standard reference “ISO 9001, Table 2” does not have a year.

Requirements

Normative references must be styled with your configuration’s Normative Reference paragraph style. In addition, Standard Citation Matching uses the character styles applied during Reference Processing to identify and match corresponding elements in your normative references and in-text citations. This Advanced Process must be run before Standard Citation Matching can be used.

Standard Citation Matching pays special attention to citations to specified years or parts of a standard, as these elements require exact matches between the citation and the normative reference:

- Citations that include a **publication year** will only make an exact match to a corresponding year in the reference. For example, the citation “ISO 12100:1989” matches reference “ISO 12100:1989” but not “ISO 12100:1990” nor “ISO 12100”. Furthermore, the citation “ISO 12100:—” matches reference “ISO 12100:—” but not “ISO 12100” nor “ISO 12100:1989.”
- Citations that specify a **standard part number** also require an exact match to their corresponding normative reference. For example, normative reference “ISO 2811-1” will not match the citation “ISO 2811”, and vice versa.

How to use

1. Run Bibliographic Reference Processing and resolve all errors.

Note: At minimum, the standard publisher, document number, and date (if any) must be properly tagged.

2. Select Standard Citation Matching from the Advanced Processing menu.

This process compares each reference to every in-text citation and inserts a warning when a citation does not have a corresponding reference or vice versa, as well as when a normative reference does not have at least one matching citation. Warnings are also inserted when a cited standard part does not include a year.

3. Review and resolve any warnings eXtyles inserts (as Word comments) that inform you how many normative references do not have matching in-text references, as well as how many standard references are missing a year, if any.

Check Numbered Citation Order

Check Numbered Citation Order automates validation of the citation order of numbered (Vancouver) style references, as well as figure, table, and box citations. It reports problems when citations are found out of the correct order.

How to use

To use the Check Numbered Citation Order function:

1. Run eXtyles up through the Citation Matching function. Note that we do not recommend running Check Numbered Citation Order prior to running Citation Matching. Complete any appropriate cleanup.
2. Select eXtyles > Advanced Processing > Check Numbered Citation Order. You will see a dialog asking you to select the bibliographic citation style used by the author. Select the appropriate style and click OK.

An alert is shown when queries have not been added to indicate that citation order checking completed successfully. If any problems have been detected, an alert will indicate the number of queries, or comments, inserted.

In some cases, if a large number of problems are detected, eXtyles reports only the first ten problems. After you have fixed these problems, please rerun the Check Numbered Citation Order function again.

Check Numbered Citation Order will not proceed if multiple references are found with the same number (e.g., two references with number 19 are found).

Check Numbered Citation Order may be run in documents with name–date (Harvard)–style reference citations to check the order of figure table and box citations. It will not report problems with name–date reference citations.

Citation Renumbering

One of the most time-consuming and error-prone tasks of a copyeditor is the renumbering of incorrectly ordered reference citations. Reassigning reference numbers, reordering the reference list, and ensuring that each renumbered internal citation corresponds to the correct reference can be a difficult and frustrating chore. The Citation Renumbering feature automates these processes.

It is important to note, however, that this complex automated task still requires the careful attention of a copyeditor, as a single unidentified citation or misplaced paragraph can cause a large number of errors when automated renumbering is run. For this reason, we encourage users to run Citation Renumbering after copyediting has been completed. eXtyles also auto-saves a new baseline copy of the document before this process so that you can easily check the accuracy of renumbered citations and references.

How to use

If Check Numbered Citation Order reports a problem, Citation Renumbering can be used to renumber the internal reference citations and reorder and renumber the reference list. To use the Citation Renumbering Function, do the following:

1. Run eXtyles up through Check Numbered Citation Order.
2. Copyedit the document. Note: As discussed previously, citation order may change during copyediting—for instance, if sentences, paragraphs, table elements, or figure captions are rearranged by the editor—so we strongly recommend that Citation Renumbering be run after the completion of copyediting.
3. Select eXtyles > Advanced Processing > Citation Renumbering.
4. Select eXtyles > Compare to Baseline to review the changes.

Unlike the other eXtyles citation-processing functions, Citation Renumbering acts only on items that already have the cite_bib character style applied to them. If an editor comes across unstyled citations (i.e., citations that were not automatically identified during Citation Matching) during copyediting, he or she must apply the cite_bib style to them by hand using the Word Styles menu before running Citation Renumbering.

Additional functions

Besides renumbering citations and references, the Citation Renumbering function also:

- Causes eXtyles to automatically save a baseline copy of the working document. This step enables editors to use Compare to Baseline to show only the renumbering changes.
- Moves uncited references to the end of the reference list. Because uncited references will be flagged during Citation Matching, such issues should be resolved before running Citation Renumbering.
- Keeps text notes following specific references with that reference during reordering.

Although Check Numbered Citation Order reports problems with figure and table callouts (e.g., the Figure 2 callout precedes the Figure 1 callout), these elements will not be automatically renumbered or reordered during Citation Renumbering, which changes reference citations only. The copyeditor must correct incorrect figure and table numbering by hand.

Harvard-to-Vancouver Citation Conversion

Harvard to Vancouver Citation Conversion allows eXtles users to change name–date (Harvard-style) citations to numbered (Vancouver-style) citations. The reference list is also numbered and reordered according to the sequence of the in-text citations.

All citations are converted to baseline numbers in square brackets. Convert/Clean Numbered Citation Style should then be run to correct the format of the bracketed citations (e.g., “[1, 2, 3]” to “[1–3]”) and, if necessary, to change the citations to a different numbered style (e.g., superscript numbers).

How to use

To use Harvard to Vancouver Citation Conversion:

1. Run eXtles up through Bibliographic References processing and PubMed and CrossRef Reference Correction or PubMed and CrossRef Checking (if applicable).
2. Run Citation Matching. Choose the first option for name–date citations.
3. Resolve any reference citation errors flagged by Citation Matching (in particular, any citations that have not been color coded should be corrected and styled with the cite_bib character style — either manually or by rerunning Citation Matching—before running the conversion, and all references should be cited).
4. Run Harvard to Vancouver Citation Conversion from the eXtles Advanced Processing menu. This step will:
 - a. Convert all citations from name–date to baseline numbers in square brackets
 - b. Add a number at the start of each reference
 - c. Resort the reference list so that all references are listed in the order in which they are cited.
5. Run Convert/Clean Numbered Citation Style (see the next section for more information). Select “[Numbers in brackets].” eXtles will automatically convert the citations to the correct style for your publication (e.g., superscript numbers); it will also reformat number series (e.g., “[1, 2, 3]” to “[1–3]”).

Limitations of conversion

Harvard-style citations can be more complex than numbered styles, and there are a handful of scenarios in which the automatic conversion will require manual intervention. Some known issues include:

- A Harvard to Vancouver conversion that results in out-of-order numbers (e.g., “[5, 7, 6, 8]”) will not be consolidated (e.g., to “[5–8]”); this reformatting will need to be done manually.
- Harvard-style citations occasionally contain surrounding text—for example, “(see Smith 2000)” or “(e.g., Jones, 2010)” —that will be preserved in the conversion and may not be appropriate to retain in a numbered citation; you should edit this text according to your style requirements.
- Harvard-style citations may also include information such as figure, table, or page numbers (e.g., “Bufe et al., 1994, p. 32”) that will be preserved in the conversion but may not be appropriate to retain in a numbered citation; you should edit this text according to your style requirements.

Harvard to Vancouver Citation Conversion is designed to complete the bulk of the work of converting from a name–date to a numbered citation style, but users should expect some manual cleanup to be necessary.

Table Footnote Matching

Table Footnote Matching automates the process of matching and tagging footnote citations found in tables. This feature is especially useful for DTDs that require table footnote linking.

In addition to linking table footnotes with their matching callouts, Table Footnote Matching performs the following tasks automatically:

- Identifies all table footnotes for which there is not a matching callout.
- Identifies all table footnotes for which there is not a footnote linking symbol.
- Identifies all table footnotes for which there is the same linking symbol as another footnote in the same table.

eXtyles does not warn if something that looks like a citation is found and does not have a matching table footnote. For example, if you have notes “a” and “b”, and a superscript “c” is found in the table, no warning is given.

Each of these issues, if it occurs, is automatically indicated in your document with the insertion of an author query or warning, which is displayed as a Word comment. An alert will appear after processing is complete to indicate the number of queries added. You can view queries by opening the Word Comments window from the Word View menu. If queries have not been added, an alert will appear to indicate that Table Footnote Matching completed successfully.

Requirements

To ensure proper functioning of the Table Footnote Matching module, please do the following (as appropriate to your editorial style):

- Place table footnotes after the table body. Footnotes may be placed either inside a cell that spans the width of the table, or immediately after the table grid in one or more paragraphs.
- If there is more than one footnote, use a new paragraph for each footnote. If within a table cell, you may use multiple paragraphs, or one unique cell per footnote.
- Use superscript markup for footnote linking symbols (e.g. ⁺, ^a, ¹). eXtyles does not support the use of superscript numbers for table footnote links because superscript numbers are often used in other contexts in tables.

Non-superscript Symbols: Most symbols do not need to be superscript to be matched during Table Footnote Matching (e.g. *, †, ‡). Letters and the symbols + and # must be superscript to be matched. eXtyles also supports the baseline style 1/ (underlined digit followed by a forward slash).

- When superscript symbols or letters are used, they may be run together (e.g. ^{ab}) or comma-delimited (e.g. ^{a,b}). Ranges (e.g. ^{a-c}) are not supported by eXtyles.
- Apply the correct table footer paragraph style to table footnotes. If any table footnote has two or more paragraphs, be sure to use the appropriate paragraph style for the second or subsequent paragraph.

How to use

When you have completed copy editing and styling the tables and their footnotes, select eXtyles > Advanced Processing > Table Footnote Matching. The table footnote callouts will be tagged with the appropriate character style.

Content Validation

Content Validation

Your configuration of eXtyles may include additional tools that style and validate document content using a variety of custom processes.



Explore this section

URL Checking

NCBI Matching/Linking

NamesforLife (N4L) Linking

Author Processing

Fix All/Small Caps

Questions? Comments?

Feel free to contact eXtyles Support at any time. Simply email us at exstyles-support@inera.com or through our [Support Portal](#). We'll be happy to help!

URL Checking

The URL Checking tool performs the following functions:

- Identifies URLs in the document (regardless of whether they are already Word hyperlinks)
- Converts them to clickable hyperlinks, if they are not already clickable, by turning them into Word Hyperlink fields
- Automatically corrects common problems with special characters or spaces found in URLs
- Checks on the Web to determine whether the link is valid

Valid URLs—URLs that may be followed without redirection to the indicated website—are not flagged. URLs that return any HTTP error code other than 200 (i.e., ones with no HTTP error) will have a Word comment inserted to bring attention to the invalid URL and provide an indication of the error encountered in attempting to follow the link.

For example, a link that points to a nonexistent page will have a Word comment inserted indicating that the server returned an HTTP 404 (“Not Found”) status code:

<http://www.inera.com/~kdkdkd>

Comment: URL Validation failed because the page <http://www.inera.com/~kdkdkd> does not exist (HTTP error 404).

URL Validation will also try to fix some cases of URLs that contain invalid characters or spaces, as sometimes happens during the editing process. For example, spaces sometimes appear mid-URL, which would cause a URL to fail in a browser. When possible, URL Validation will remove the incorrect spaces and add a comment such as:

Comment: The URL “<http://dtd.nlm.nih.gov/faq.html>” has been corrected. One or more spaces were removed.

Examples of other cleanup cases include replacing en dashes with hyphens, or similar characters with a simple tilde.

How to use

To use URL Checking:

- Select Advanced Processing from the eXtyles menu
- Select URL Checking

URL Checking is best run after Bibliographic References processing because URL conversion to clickable hyperlinks when they’re found in reference lists interferes with eXtyles recognition of electronic references during Bibliographic References processing.

Reviewing comments

Redirected URLs

Experience has shown that the most common warning from URL Checking is that a URL has been redirected to a different final URL. There are many reasons for this, including:

- A website has been reorganized and the (wise) webmaster has automatically redirected old URLs to the new pages.

In cases such as this, you may want to update the URL in the document to reflect the most current URL.

- A “vanity” URL has been used. For example, some drug manufacturers will register a domain for a drug name, but when you follow the URL to the website of the drug, you actually visit the manufacturer’s landing page. In such cases, you might want to keep the vanity URL for the drug (despite the redirection warning) because the drug manufacturer could be acquired, and the ultimate landing page would change. In other words, when a URL is redirected, we recommend keeping in the document the URL that will likely have the longest life.
- Some URLs are always redirected. For example, URLs to articles on the New York Times website have a new and unique final URL on every single visit, even though the URL you click is identical. Redirection is performed in this case for the purpose of tracking web visitors. In such cases, the redirect warning can be ignored.

Excluded URLs

URL Validation does not check URLs that link to PubMed and CrossRef in reference lists because these links have likely been added by eXtyles.

Limitations of URL Checking

URL Checking has the following limitations:

- If a hyperlink has no comment after URL Checking, there’s no guarantee that it points to a working page. Some websites redirect links for now-dead pages to a standard page that indicates a page has moved. For critical cases, there is still no substitute for a manual check of each page.
- A Word hyperlink with an underlying “mailto” property, indicating that the hyperlink is an email address, will not be validated.

Connection Error Codes

When URL Validation encounters a connection error, it inserts a warning with a corresponding error code:

Connection Failures

Error message returned	Error code
Authoritative: Host not found	ERROR_INTERNET_NAME_NOT_RESOLVED
Network subsystem failed	ENETDOWN
No file handles available	EMFILE
No buffer space available	ENOBUFS
Handle is not a socket	ENOTSOCK

Connection Status Errors

Error message returned	Error code
URL is incorrect	HTTP Error 400
Restricted source	HTTP error 403
Does not exist	HTTP error 404
Does not exist	HTTP error 410

Not connected	ENOTCONN
Address not available	EADDRNOTAVAIL
Connection aborted	ECONNABORTED
Connection reset	ERROR_INTERNET_CONNECTION_RESET
Connection timed out	ETIMEDOUT
Connection refused	ECONNREFUSED
Failed to read from connection	EREAD
Failed to write to connection	EWRITE
Host down	EHOSDOWN
Host unreachable	EHOSTUNREACH
Non-authoritative: host not found or server failure	TRY_AGAIN
Non-recoverable: refused or not implemented	NO_RECOVERY
Internal error	EINTERNAL
Valid name, no data record for type	NO_DATA

NCBI Matching/Linking

The eXtyle NCBI Matching/Linking module looks for accession numbers to entries in the various NCBI databases and some EBI databases. If it finds a match, it applies a character style to the accession number specific to the appropriate database, and it also creates a hyperlink to the record for that accession number in the database.

For example, when the module sees this text:

More recently, closely related strains were also isolated ... from the ciliate *Collinia* sp. endoparasitic in euphausiids from the Gulf of California (unpublished GenBank record EU090136), and in a culture-independent analysis of the microbial burden and diversity in commercial airline cabins [7].

it applies the character style db_ncbi_genbank and this link to the text "EU090136":

<http://www.ncbi.nlm.nih.gov/nuccore/156744481>

Clicking on this link brings up the NCBI GenBank record for this sequence. The linked text is displayed:

More recently, closely related strains were also isolated ... from the ciliate *Collinia* sp. endoparasitic in euphausiids from the Gulf of California (unpublished GenBank record [EU090136](https://www.ncbi.nlm.nih.gov/nuccore/156744481)), and in a culture-independent analysis of the microbial burden and diversity in commercial airline cabins [7].

Matching ranges of accession numbers

If the module finds a range of accession numbers, it embeds a link that includes each accession number in the range (up to a user-configurable limit, set to 100 by default).

For example, when the module sees this text:

The GenBank/EMBL/DDBJ accession numbers for the bovine RVC sequences determined in this study are AB738402–AB738417, as detailed in Fig. 1.

it applies the character style to the entire range and generates this link:

<http://www.ncbi.nlm.nih.gov/nuccore/430726479%20430726477%20430726475%20430726473%20430726471%20430726469%20430726467%20430726465%20430726463%20430726461%20430726459%20430726457%20430726455%20430726453%20430726451%20430726449>

which brings up a list of all 16 accession numbers in the range.

The GenBank/EMBL/DDBJ accession numbers for the bovine RVC sequences determined in this study are [AB738402–AB738417](#), as detailed in Fig. 1.

If a range of accession numbers greater than the maximum limit is encountered (set to 100 by default), the NCBI

Matching/Linking module will style the range as shown in the previous example, but the link will point only to the first and last accession numbers in the range, not to all of the intermediate values.

How to use

To use NCBI Linking/Matching:

1. Select Advanced Processing from the eXtyle menu
2. Select NCBI Linking/Matching

Databases Linked

NCBI hosts a number of sequence and structure databases for nucleotide and amino acid sequence data. It also hosts a number of literature databases, most obviously PubMed and PubMed Central, and databases that contain other original data, such as the Gene Expression Omnibus (GEO) database, and sources of secondary data such as the HIV-1, Human Protein Interaction database and MedGen. A full list can be found at <http://www.ncbi.nlm.nih.gov/guide/all/#databases>. The NCBI Matching/Linking module also links to a few EBI databases; more information about EBI can be found at <http://www.ebi.ac.uk>.

The NCBI Matching/Linking module uses 17 different character styles to indicate the database that has been matched to. These are shown in the following table:

EBI Databases

Character style	Database
db_ebi_ArrayExpress_Array	A database of genome arrays used in ArrayExpress experiments
db_ebi_ArrayExpress_Experiment	A database of genomics experiments, results of which are included in ArrayExpress
db_ebi_ArrayExpress_GEO	Functional genomics data, either submitted directly to ArrayExpress or imported from the NCBI GEO database

NCBI Databases

Character style	Database
db_ncbi_ccds	CCDS, the Consensus CDS Project
db_ncbi_dbGap	dbGaP, the Database of Genotypes and Phenotypes
db_ncbi_dbnsp	dbSNP, the Database of Short Genetic Variations or single nucleotide polymorphisms (SNPs)
db_ncbi_entrezgene	Entrez Gene

db_ncbi_genbank	GenBank – both accession numbers and GI numbers are recognized
db_ncbi_genpept	Translated protein sequences from GenBank (see Entrez Protein)
db_ncbi_geo	GEO, Gene Expression Omnibus database
db_ncbi_omim	OMIM, Online Mendelian Inheritance in Man
db_ncbi_pdb	Protein Data Bank; these records form part of Entrez Protein
db_ncbi_refseq	RefSeq, the NCBI Reference Sequence database
db_ncbi_SRA	SRA, the Sequence Read Archive, containing raw sequence data from next-generation sequencing platforms
db_ncbi_swissprot	Swiss-Prot protein sequence database; these records form part of Entrez Protein
db_ncbi_unigene	UniGene
db_ncbi_other	Records that match an NCBI database covered by the module but not listed above

Databases Not Linked

Not all of the NCBI databases are covered by NCBI Matching/Linking. Specifically, the module does not attempt to link to the following databases:

- PubMed (covered by [PubMed Reference Checking & Correction](#))
- PubMed Central
- GEO Profiles (a distinct database from the GEO database)
- MeSH
- NCBI Bookshelf
- NLM Catalog

Excluded Document Parts

The module excludes the reference section of the document from the matching process by default.

It is also possible to set the module up to omit other paragraph styles on a customer-specific basis. For example, if accession numbers would never appear in the acknowledgments section of your content, this paragraph style could be excluded, and this might help to avoid false-positive matches against grant numbers. You could exclude the affiliations, if complex room numbers or postal codes throw up warnings.

How It Works

Each of the NCBI databases has certain constraints on the form that its accession numbers can take. For example, sequences in GenBank that were originally direct submissions to DDBJ (the DNA Data Bank of Japan) can be in the form of the letter “D” followed by five digits or the letters “AB” followed by six digits. Direct submissions to EMBL can take the form of five digits preceded by “V”, “X”, “Y”, or “Z” or six digits preceded by “AJ”, “AM”, “FM”, “FN”, “FO”, “HE”, “HF”, or “HG”. EST (expressed sequence tag) sequence accession numbers follow different rules. The eXtyles NCBI Matching/Linking module uses these rules to look for strings in the text that might match one of the databases.

If a string that matches the rules for one of the databases is found, the module queries that database to see whether it contains an accession that matches the found string and, if it does, it links that string in the text and applies the appropriate character style.

If at least one match is found during this “first pass”, the NCBI Matching/Linking module then runs a second, less strict pass, under the assumption that, if the document contains at least one accession number, it’s worth looking for other patterns that might be accession numbers that contain errors or that have not yet been released by the database.

During this second pass, the module looks for strings in the text that loosely match the database rules but don’t correspond to an entry in the database. The module then attaches a Word comment to those pieces of text to alert the editor to the possibility that they correspond to a database record.

The second pass only takes place if the module has already found at least one match to a database in the document; this is designed to reduce the likelihood of false-positives in content of a subject matter where accession numbers don’t appear.

The module also uses some semantic clues to tell it that a potential match is either more likely or less likely to match one of the databases. For example, if text such as “accession number” or “GenBank” appears in the proximity of the match, it is more likely to be an accession number. In contrast, if terms such as “grant”, “award”, or “funding” appear, the module assumes that the possible match is actually a grant number of some kind, which not infrequently have a structure that matches one of the NCBI databases.

NamesforLife (N4L) Linking

NamesforLife (N4L) automatically identifies biological names in Word documents (currently, validly published names of Bacteria and Archaea at all ranks, from domain to subspecies, as well as names for which a published genome exists; other terminologies are in the works) and provides DOI-based links to the N4L service. You can learn more about the N4L service at <http://services.namesforlife.com/about>.

How to use

To use N4L Linking, select N4L Matching/Linking from the Advanced Processing menu. The module looks for biological names listed in the N4L database. If it finds a match, it applies a character style to the biological name specific to the rank, and it also creates a hyperlink to the record for that name in the database.

For example, when the module sees this text:

However, a few species — for example, *Thiomargarita namibiensis* — are up to half a millimetre long and are visible to the unaided eye.

it applies the character style cite_n4l_species and this link to the text “Thiomargarita namibiensis”:

<http://doi.org/10.1601/nm.2295>

Clicking on this link brings up the N4L record for this species. The linked text is displayed:

However, a few species — for example, *Thiomargarita namibiensis* — are up to half a millimetre long and are visible to the unaided eye.

The N4L Linking module includes 12 different character styles to indicate the rank of the biological name that has been matched.

Author Processing

Author Processing automatically identifies and tags all sub-elements in the paragraph in your document that contains the author name(s). This tagging is used primarily for the production of XML directly from eXtyles. It can also be used to help compositors automatically identify author names that will be used in constructing running heads. Author Processing should not be run on documents that are not being exported to XML.

Be sure that you have completed copy editing of the manuscript before you run this process. Author Processing is designed to tag copy edited elements, not to automate copy editing.

How to use

When you have completed copy editing, select eXtyles > Advanced Processing > Author Processing. The author paragraph(s) will be tagged and highlighted. For example, the following author paragraph:

Ravinder Mamtani, Jr., MD* and Andrea Cimino, RN, DPM, Licensed Acupuncturist**

will appear in this form after Author Processing:

Ravinder Mamtani, Jr., MD* and Andrea Cimino, RN, DPM, Licensed Acupuncturist**

All components of the author line, except for punctuation and connecting words, are color coded. In addition, the author name components are styled with Word character styles such as au_fname or au_surname.

Character styles

Color coding is provided for proofing purposes. If a name is miscoded by the automatic processing, it may be correctly coded by selecting the character styles lists in the following table from the Word Styles menu. The following table shows the color coding and character style applied to each part of an author name.

Part	Character Style	Example Text
Author	None	Ravinder Mamtani, MD*
First name/Given name	au_fname	Ravinder
Surname	au_surname	Mamtani
Generation	au_suffix	Jr.
Degree(s)	au_deg	MD
Footnote link	cite_fn	*

Collaboration	au_collab	for the Biological Research Study Group (not shown in this example)
Role	au_role	Editor (not shown in this example)
Prefix	au_prefix	Gen (not shown in this example)

ORCID Support in Author Processing

ORCID support has been added to the eXtyles XML export. ORCID(s) are generally collected by online submission systems and made available to publishers in XML transmittal files. This metadata can be imported into your Word file using the Metadata Browse function in the Document Information dialog, and the ORCID and author information can then be synchronized, validated, and merged with the Author paragraph in the Word file during Author Processing.

ORCID(s) can also be manually inserted into your Word file. If ORCID(s) are included in the author line of a manuscript in this form:

John Smith (<http://orcid.org/0000-0001-6858-8806>), Jane Smith (<http://orcid.org/0000-0002-2808-802X>)

then eXtyles will export them as:

```
<ext-link ext-link-type="orcid"
xlink:href="http://orcid.org/0000-0001-6858-8806"/>http://orcid.org/0000-0001-6858-8806</ext-link>
```

inside the <contrib> element when using the NLM DTD (any version), or as:

```
<contrib-id contrib-id-type="orcid">http://orcid.org/0000-0001-6858-8806</contrib-id>
```

when using JATS, which added the new contrib-id element.

You can learn more about eXtyles and ORCID on the Inera website: [The eXtyles ORCID Integration Suite](#)

Fix All/Small Caps

Fix All/Small Caps is designed to make corrections to text in which authors have used the Word Small Caps and ALL CAPS character formats. Using this Advanced Processing item does the following:

- Removes Small Caps markup from any uppercase letters. Small Caps will be applied only to lowercase letters.
- Converts ALL CAPS character formatting to true capital letters, and removes Word's ALL CAPS character format.

Both of these cleanup functions work correctly for both regular letters as well as any foreign-accented letters.

Post-Processing Cleanup

The eXtyles Post-Processing Cleanup feature makes another pass through a document that has already been processed with eXtyles for the next step in your workflow. It is generally used for documents that will be sent to a composition application such as Adobe InDesign.

Certain options in Post-Processing Cleanup should not be run on files that will be exported from Word to XML with eXtyles. They should only be run if the eXtyles Word file is to be directly imported into another application or exported as a PDF.

How to use

To run Post-Processing cleanup:

1. Select eXtyles > Post-Processing Cleanup.
2. When the Post-Processing Cleanup dialog appears, check the boxes of the operations you want included in the process and click OK. Check a box only if you're sure it's necessary, especially if you're exporting to valid XML afterward. If you'd like the default settings adjusted, please contact exstyles-support@inera.com.

Warning: For some organizations, all Post-Processing Cleanup options are turned off by default, as most will strip information necessary for a valid XML export of the Word file and should never be run.

Settings

Post-Processing Cleanup supports the following operations:

Comment Processing

Apply to Reviewers

Allows the editor to select which reviewers' comments will be processed. Either All Reviewers or just the comments associated with specific functions (e.g., eXtyle Reference Check) can be selected.

Convert Word Comments to Text

Converts Word comments to inline text. The comments can be placed (a) before the highlighted text to which the comment has been applied, (b) after the highlighted text to which the comment has been applied, or (c) in a list at the end of the Word document. Converted comments can be prefixed and suffixed with user-definable text strings. The inserted text can optionally be made a colored font and/or boldface. Disabling this option also disables the controls for comment placement, prefix, suffix, color, and boldface. This function should not be used if the file is to be exported to XML.

Before/After Text/Document End

Controls whether the comment is placed before or after the highlighted text to which the comment has been applied. The default setting is After, and in general Inera recommends this setting.

Prefix/Suffix

A Word comment, when inserted into the body text, may be prefixed and suffixed with user-definable text. In addition, the text can include a unique number for each comment, the comment author's name, and the comment author's initials. These insertions are controlled with the following control codes:;%N = The comment author name;%I = The comment author initials;%D = The comment number;%Z = The comment number, padded with leading zeros;For example, the default prefix/suffix text shown in the dialog will take the comment "This is a comment" and insert it as "[[Q1: This is a comment Q1]]" where 1 is the number of the comment.

Color

When enabled, this option will change the comment font to one of six color options (black, blue, red, green, gray, or violet) so that comments stand out from surrounding text.

Make Comments Bold

When enabled, this option will insert comments as boldface text so that they stand out from surrounding text.

Remove Word Comments

Remove Word comments in the file. The default is to remove all comments. However, you can also remove comments from specific reviewers by selecting the reviewer on the drop-down list.

Text Color

Remove Word Text Highlights

eXtyles sometimes makes use of Word's highlighting to make certain text stand out or easier to proof. This option will remove all highlights that have been applied to the text, whether by eXtyles or by an editor.

Remove Word Text Shading

eXtyles sometimes makes use of Word Background Text Shading to make certain text stand out or easier to proof. This option will remove all text shading that has been applied to the text, whether by eXtyles or by an editor.

Remove Paragraph Shading

eXtyles sometimes makes use of Word's Paragraph Shading to make certain text stand out or easier to proof. This option will remove all paragraph shading that has been applied to the text, whether by eXtyles or by an editor.;Note that this option will remove paragraph shading even if it has been applied to paragraphs inside tables.

Word Styles

Convert User-Defined Character Styles to Face Markup

Converts application of user-defined character styles to plain face markup. This cleanup is helpful in to prepare the document for desktop publishing where it is not desired to keep character styles. This function can also be used in conjunction with "Remove Text Shading" and "Remove eXtyles Tags" to "cleanup" a reference list after eXtyles processing.

This function should not be used if the file is to be exported to XML.

Remove Unused Word Styles

Removes any Word paragraph and character styles that are not in use in the document. This feature is mostly an aid to certain tools used with Quark XPress to index content.

eXtyles Tags

Remove eXtyles Tags

This function is used to remove the tags that eXtyles inserts at the start and end of each reference. If no paragraph style has been selected in either drop-down menu, please select the paragraph style used for your reference list.;Some publications

have two paragraph styles for references. If your publication has multiple styles for references, please select both. If not, the second field may be left empty.

This function should not be used if the file is to be exported to XML.

Other

Remove Hyperlinks starting with text

This function enables users to strip hyperlinks to Medline abstracts or DOIs that were automatically inserted during eXtyles reference validation processes.;This function should not be used if the file is to be exported to XML.

Convert Footnotes and Endnotes to Plain Text

For organizations that prefer to maintain Word Footnote and Endnote structure during copy editing (by default, Word Footnotes and Endnotes are converted to plain text and moved to the end of the document at Cleanup). For more information, contact your support representative at Inera (extyles-support@inera.com).

Convert plain-text Footnotes and Endnotes to Word Footnotes and Endnotes

This function allows plain-text notes to be converted to Word Footnotes and Endnotes. For more information about handling of footnotes and endnotes in eXtyles, see the section on “Footnotes and Endnotes”. To discuss your footnote and endnote workflow, contact your support representative at Inera (extyles-support@inera.com).

Dialog Tools

In addition, Post-Processing Cleanup has three buttons to rapidly create default settings:

- **Set All:** Set all options in the dialog to active.
- **Clear All:** Clear all options in the dialog. Click this button first if you want to run just a single operation such as removing comments from a specific reviewer
- **Reset:** Resets the default check boxes of the dialog

Recommended Settings for a Word-to-PDF Workflow

If your organization publishes PDFs from Word – or you use a workflow that requires the removal of all eXtyles character styles and colors – then you will find the following settings helpful in cleaning up your document after eXtyles processing.

- **Remove Word Text Highlights:** This removes all colored highlighting, such as that applied during Auto-Redact
- **Remove Word Text Shading:** This removes all text shading, such as the colored shading applied to references, citations, and authors
- **Convert User-Defined Character Styles to Face Markup:** This removes the character styles, such as those applied to references, citations, and authors, while preserving face markup such as italics and bold.
- **Remove eXtyles Tags:** This removes fielded tags, such as <jrn> in a reference list.

JATS/NLM XML Export

Your implementation may have a custom export filter designed to create XML files that are valid according to one or more varieties of the NLM Book DTD, the BITS (Book Interchange Tag Suite) DTD, the JATS (Journal Article Tag Suite) DTD, and/or the NLM Journal Publishing DTD.

When exporting files from eXtyles, select the appropriate option from the eXtyles Export menu. This option will convert the file from a Word document to XML and perform a validating parse of the XML against the DTD. The new file is by default saved with the same name as the Word file, except that it has an .XML file extension. The following documentation has been developed with generic paragraph style names. The specific names used for some elements (e.g. Book Information in a book review) will vary according to the specific paragraph style names used within your eXtyles configuration.

Before creating the export, it is very important to style the document correctly and run all eXtyles functions as specified. In addition, correct copyediting of the document to your publication's style, especially with regard to the front matter (e.g. authors, affiliations, and footnotes) is essential. Failure to style and edit the document correctly prior to export may result in parsing errors or the production of incorrect XML.

The latest book DTD that is currently supported by eXtyles is version 1.0 of the BITS DTD. For journal articles, the latest version of the DTD that eXtyles supports is version 1.1 of JATS. This documentation is written from the perspective of these latest versions of the journal and book DTDs; pertinent differences in earlier DTD versions are noted.

General Export Notes and Best Practices

Never use an XML file created by eXtyles that has not parsed successfully.

The following items should be kept in mind when preparing manuscripts for export:

1. **Only use paragraph styles that appear on the eXtyles Paragraph Styling palette.** Any other styles may result in XML parsing errors, or possibly XML that parses but is not correct. A warning is given during export if any non-conformant paragraph styles are used.
2. **All tables, or content styled with the Table elements of the paragraph styles palette, must be in Word table format.** Otherwise, an export is likely to produce parsing errors. All content for each table should be in a single Word table. Splitting content for a single table across multiple Word tables will likely result in incorrect XML and may result in parsing errors.
3. **If one Word table immediately follows another, there must be a blank paragraph between the tables.** This blank paragraph cannot have any of the table paragraph styles applied to it. It may be styled as a regular paragraph or left as "Normal". To avoid the need for blank paragraphs between tables, Inera recommends that table titles and footnotes be placed outside of the Word table as ordinary paragraphs.
4. **No information should be set in a table that is not intended to be in a table in XML.** For example, if a table has been used to format the layout of figures and captions visually in the Word document for creation of author proofs, such items should be "de-tabled" before export.
5. **Avoid using ranges of numbered citations.** Although eXtyles supports ranges of numbered literature citations (e.g. "see refs 12–15"), ranges of display items (e.g. "Figs 1–4" or "Tables 1–3") are not recommended because there is no text for a reader to click on in an electronic product to reach, say, Fig. 2 in the first example. Although such ranges

may parse and can be set up to yield usable XML, it may be easier to reword these citations as "Figs 1, 2, 3, and 4" and "Tables 1, 2, and 3". If you need to use ranges of display items in your content, please contact eXtyles-support@inera.com for more information and a possible alteration to your export filter.

6. **When possible, place paragraphs in the same order as they appear in print.** In general, eXtyles is quite flexible about the order of front-matter or metadata paragraphs — it will automatically reorder them according to the DTD requirements during export. However, it is always best to place paragraphs in the same order as they appear in print, except that footnotes may appear at the end of the Word file. Note that when author/affiliation information appears at the end of items (e.g. editorials, letters), it may be placed at the end in the Word document and eXtyles will correctly place the elements in the front matter according to the DTD requirements.
7. **All appendix matter must be labelled.** Each appendix matter must start with either a paragraph styled as an appendix head, or with a figure or table that has: (a) "Appendix" in the label (e.g. "Appendix 1"), or (b) an uppercase letter preceding the number (e.g. "Table A1").

Preparing the Word file for Export

The key to obtaining correct XML is for the Word file to be correctly structured. In addition to the correct use of Word paragraph and character styles and paragraphs not appearing in "forbidden" locations, certain document elements need to be structured appropriately for the XML to be correct.

eXtyles is designed to identify various sub-elements within certain paragraph styles automatically. This not only saves you time but also reduces the number of styles that your configuration requires. Cases where eXtyles automatically tags content on export are illustrated within this section.

Appendices

All appendix matter must start with either a paragraph styled as an appendix head, or with a figure or table that has: (a) "Appendix" in the label (e.g. "Appendix 1"), or (b) an uppercase letter preceding the number (e.g. "Table A1").

Depending on your eXtyles configuration, appendices may require distinct heading and paragraph styles. In these cases, if regular heading or paragraph styles are used inside an appendix, this may lead to a parsing error or to incorrect XML.

Authors Metadata XML

Author Names

The eXtyles Advanced Process for [Author Processing](#) will parse paragraphs with author names into their constituent elements (surname, given names, initials, prefixes, and suffixes) as well as identifying organizational authors. eXtyles can also be configured to distinguish between various types of contributors (e.g. authors and editors) depending on context in the document.

The author list must be reviewed after running Author Processing to ensure that the various elements have been correctly identified. Certain situations can cause problems for Author Processing in the standard eXtyles configuration:

- names in non-Western order (i.e. Surname Given-Names)
- multi-word surnames separated by spaces
- unusual or non-standard degree names.

Errors in Author Processing can be corrected by careful hand tagging.

Please be aware that degree names must be explicitly listed in an eXtyles data file. If you find that a degree is not shaded with the correct color, then it's likely that it is not listed in the eXtyles data file and eXtyles misapplied the `au_orgrname` character style instead. When this happens, please fix the character style manually and report the missing degree to exstyles-support@inera.com.

Introductory text in an "author" paragraph, such as "Edited by", must also be styled, in this case as `au_prefix`.

ORCIDs

ORCID(s) are generally collected by online submission systems and made available to publishers in XML transmittal files. This metadata can be imported into your Word file using the [Metadata Browse/Import](#) function in the Document Information dialog, and the ORCID and author information can then be synchronized, validated, and merged with the Author paragraph in the Word file during Author Processing (see [ORCID Support in Author Processing](#)).

ORCID(s) can also be manually inserted into your Word file If ORCID(s) are included in the author line of a manuscript in this form:

John Smith (<http://orcid.org/0000-0001-6858-8806>),
Jane Smith (<http://orcid.org/0000-0002-2808-802X>)

then eXtyles will export them as:

```
<ext-link ext-link-type="orcid" xlink:href="http://orcid.org/0000-0001-6858-8806"/>
http://orcid.org/0000-0001-6858-8806
</ext-link>
```

inside the <contrib> element when using the NLM DTD (any version), or as:

```
<contrib-id contrib-id-type="orcid">http://orcid.org/0000-0001-6858-8806</contrib-id>
```

when using JATS, which added the new contrib-id element.

Author Affiliations

Author affiliations can be edited as one affiliation per paragraph; alternatively, eXtyle now also supports multiple affiliations in a single paragraph.

Option 1: One affiliation per paragraph

In the "one affiliation per paragraph" style, when superscript letters, numbers, or symbols are used to link affiliations to authors, the linking character must be at the start of the affiliation paragraph.

The following author list and affiliations will parse correctly:

Daniel Růžek,¹ Patrik Kilian,² Martin Tlustý³ and Ivan Gelbič⁴

¹Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

²Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic and Faculty of Science, University of South Bohemia, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

³Pierre de Coubertin High School, František Křížík Sq. 860, CZ-39030 Tábor, Czech Republic

⁴Institute of Entomology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

This style makes good use of space if multiple authors share affiliations. The example yields the following XML:

```

<contrib-group>
<contrib contrib-type="author">
<name><surname>Ržek</surname><given-names>Daniel</given-names></name>
<xref ref-type="aff" rid="aff1"><sup>1</sup></xref>
</contrib>
<contrib contrib-type="author">
<name><surname>Kilian</surname><given-names>Patrik</given-names></name>
<xref ref-type="aff" rid="aff2"><sup>2</sup></xref>
</contrib>
<contrib contrib-type="author">
<name><surname>Tlustý</surname><given-names>Martin</given-names></name>
<xref ref-type="aff" rid="aff3"><sup>3</sup></xref>
</contrib>
<contrib contrib-type="author">
<name><surname>Gelbi</surname><given-names>Ivan</given-names></name>
<xref ref-type="aff" rid="aff4"><sup>4</sup></xref>
</contrib>
<aff id="aff1"><label>1</label>Institute of Parasitology, Biology Centre of the
Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 eské Budjovice,
Czech Republic</aff>
<aff id="aff2"><label>2</label>Institute of Parasitology, Biology Centre of the
Academy of Sciences of the Czech Republic and Faculty of Science, University of South
Bohemia, Branišovská 31, CZ-37005 eské Budjovice, Czech Republic </aff>
<aff id="aff3"><label>3</label>Pierre de Coubertin High School, František Kižík Sq.
860, CZ-39030 Tábor, Czech Republic </aff>
<aff id="aff4"><label>4</label>Institute of Entomology, Biology Centre of the Academy
of Sciences of the Czech Republic, Branišovská 31, CZ-37005 eské Budjovice, Czech
Republic</aff>
</contrib-group>

```

Option 2: Alternating author and affiliation paragraphs

Alternatively, each author's name can be followed by their affiliation, without the need for affiliation numbers or footnote symbols, as follows:

Daniel Růžek

Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

Patrik Kilian

Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic and Faculty of Science, University of South Bohemia, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

Martin Tlustý

Pierre de Coubertin High School, František Křižík Sq. 860, CZ-39030 Tábor, Czech Republic

Ivan Gelbič

Institute of Entomology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

The XML output from this style is similar to the first example, but there are no links between the author and their affiliation. Instead, each author appears with their affiliation in a separate <contrib-group> element:

```
<contrib-group>
<contrib contrib-type="author">
<name><surname>Růžek</surname><given-names>Daniel</given-names></name>
</contrib>
<aff id="aff1">Institute of Parasitology, Biology Centre of the Academy of Sciences of
the Czech Republic, Branišovská 31, CZ-37005 eské Budjovice, Czech Republic</aff>
</contrib-group>
```

Option 3: All affiliations in one paragraph

Affiliations 1, 2, and 4 in this example share a street address, and editorially it might be preferable to combine the addresses into a single paragraph and save space. eXtyles supports this editorial style, and it is possible to obtain correct XML if the affiliations are set up like this:

Daniel Růžek,¹ Patrik Kilian,² Martin Tlustý³ and Ivan Gelbič⁴

Institutes of Parasitology¹ and Entomology⁴, Biology Centre of the Academy of Sciences of the Czech Republic, and Faculty of Science, University of South Bohemia², Branišovská 31, CZ-37005 České Budějovice, Czech Republic; ³Pierre de Coubertin High School, František Křižík Sq. 860, CZ-39030 Tábor, Czech Republic

which yields this XML:

```
<contrib-group>
<contrib contrib-type="author">
<name><surname>Růžek</surname><given-names>Daniel</given-names></name>
<xref ref-type="aff" rid="aff1"><sup>1</sup></xref>
</contrib>
<contrib contrib-type="author">
<name><surname>Kilian</surname><given-names>Patrik</given-names></name>
<xref ref-type="aff" rid="aff3"><sup>2</sup></xref>
</contrib>
<contrib contrib-type="author">
<name><surname>Tlustý</surname><given-names>Martin</given-names></name>
<xref ref-type="aff" rid="aff4"><sup>3</sup></xref>
</contrib>
<contrib contrib-type="author">
<name><surname>Gelbi</surname><given-names>Ivan</given-names></name>
<xref ref-type="aff" rid="aff2"><sup>4</sup></xref>
</contrib>
<aff>Institutes of Parasitology<target id="aff1"><sup>1</sup></target> and
Entomology<target id="aff2"><sup>4</sup></target>, Biology Centre of the Academy of
Sciences of the Czech Republic, and Faculty of Science, University of South
Bohemia<target id="aff3"><sup>2</sup></target>, Branišovská 31, CZ-37005 eské
Budjovice, Czech Republic; <target id="aff4"><sup>3</sup></target>Pierre de Coubertin
High School, František Kižík Sq. 860, CZ-39030 Tábor, Czech Republic</aff>
</contrib-group>
```

Notice that the affiliation IDs are assigned in the order in which they appear in the affiliation paragraph, which does not necessarily correspond to the actual numbers used.

If you would like to be able to support this affiliation style in your content, you should discuss it with any downstream vendors such as online hosting providers, as they may not by default be able to support this presentation style.

Correspondence Details

Similar to affiliations, eXtensible Markup Language (XML) supports linking of correspondence details either with or without a footnote symbol. Both of the following examples will yield the correct correspondence details in the XML:

1) Corresponding author indicated by a footnote symbol (note style names in brackets)

Daniel Růžek,¹ Patrik Kilian,² Martin Tlustý³ and Ivan Gelbič^{4*}

¹Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

²Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic and Faculty of Science, University of South Bohemia, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

³Pierre de Coubertin High School, František Křižík Sq. 860, CZ-39030 Tábor, Czech Republic

⁴Institute of Entomology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

*Author for correspondence.

2) Corresponding author named in a "correspondence" paragraph without a footnote symbol

Daniel Růžek,¹ Patrik Kilian,² Martin Tlustý³ and Ivan Gelbič^{4*}

¹Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

²Institute of Parasitology, Biology Centre of the Academy of Sciences of the Czech Republic and Faculty of Science, University of South Bohemia, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

³Pierre de Coubertin High School, František Křižík Sq. 860, CZ-39030 Tábor, Czech Republic

⁴Institute of Entomology, Biology Centre of the Academy of Sciences of the Czech Republic, Branišovská 31, CZ-37005 České Budějovice, Czech Republic

Correspondence: Ivan Gelbič (gelbic@entomology.cz).

In the second example, the corresponding author's name should match his or her name in the author line in order for eXtyle to successfully add the appropriate XML (corresp="yes") to the author's name within the <contrib-group> (see the following example output). The matching process is more robust if both the given name(s) and surname appear in the correspondence paragraph, rather than just the surname.

Within the XML, the corresponding author's name is tagged as follows:

```
<contrib contrib-type="author" corresp="yes">
<name><surname>Gelbi</surname><given-names>Ivan</given-names></name>
<xref ref-type="aff" rid="aff4"><sup>4</sup></xref>
<xref ref-type="corresp" rid="cor1">*</xref>
</contrib>
```

Note that the `<xref ref-type="corresp">` element appears only if a footnote symbol is used to indicate the corresponding author (see the first example above).

A `<corresp>` element then appears within the `<author-notes>`. In the first example, the element reads:

```
<corresp id="cor1">
<label>*/</label>Author for correspondence.
</corresp>
In the second example, the <corresp> element reads:
<corresp id="cor1">
<b>Correspondence:</b> Ivan Gelbi (<email
xlink:href="gelbic@entomology.cz">gelbic@entomology.cz</email>).
</corresp>
```

Note that eXtyle has tagged the email addresses without the need for any intervention. By default, eXtyle will automatically identify and tag email addresses within Affiliation and Correspondence paragraphs. Please contact exstyles-support@inera.com if you have email addresses in other paragraphs that should be automatically tagged.

Hand-tagging Elements of Author Affiliations and Correspondence Details

Beyond email addresses, eXtyle does not add further granular structure to author affiliations or correspondence paragraphs by default. However, support is available for a number of individual elements within author affiliation information. With the exception of the country (see below), these elements must be identified manually and tagged carefully by hand.

The elements that are currently supported are Institution, Country, Phone, Fax, and the generic element Address Line. These elements are respectively represented by the following character styles:

- `af_institution`
- `af_country`
- `af_phone`
- `af_fax`
- `af_addr-line`.

These character styles can be applied to either Affiliation or Correspondence paragraphs.

An example of a hand-tagged Affiliation and Correspondence section is shown below:

J. Craig Venter
Synthetic Genomics Inc., 11149 North Torrey Pines Road, La Jolla, CA 92037, **USA**
Correspondence: jcraigventer@synthetic.com. Phone: **+1 555 123 4567**; Fax: **+1 555 987 6543**.

This would generate the following XML:

```

<contrib-group>
<contrib contrib-type="author"><name>
<surname>Venter</surname><given-names>J. Craig</given-names>
</name></contrib>
<aff id="aff1"><institution>Synthetic Genomics Inc.</institution>,
<addr-line>11149 North Torrey Pines Road</addr-line>,
<addr-line>La Jolla</addr-line>, <addr-line>CA 92037</addr-line>,
<country>USA</country></aff>
</contrib-group>
<author-notes><corresp id="cor1">Correspondence: <email
xlink:href="jcraigventer@synthetic.com">jcraigventer@synthetic.com</email>.
Phone: <phone>+1 555 123 4567</phone>; Fax: <fax>+1 555 987 6543</fax>.
</corresp></author-notes>

```

Note that there is no requirement for all of the text in either the Affiliation or Correspondence paragraph to be hand-tagged; only those elements that you want to identify in the XML need to be tagged.

It is possible for eXtyle to parse the country from the affiliation automatically, although this setting is off by default.

Contact exstyles-support@inera.com if you require the ability to hand-tag elements of author affiliations and/or you require automatic tagging of countries within affiliations.

Author Biographies

Author biographies can be set up in one of two ways, depending on your eXtyle configuration.

By default, authors are not linked to their biographies in the XML file during export, and are placed in the <back> of the XML file. Author biographies may be placed anywhere in the Word document. In this example, the author biography appears after the author affiliation:

Authors	Erwin A. Alampay
Affiliations	National College of Public Administration and Governance (NCPAG), Raul P. de Guzman St., University of the Philippines, Diliman, Quezon City 1101, Philippines
Author_Biography	Erwin A. Alampay is an Associate Professor at the National College of Public Administration and Governance, University of the Philippines.

When exported to XML, author and affiliation are contained in the <front> section of the XML:

```

<contrib-group>
<contrib contrib-type="author"><name>
<surname>Alampay</surname><given-names>Erwin A.</given-names>
</name></contrib>
<aff>National College of Public Administration and Governance
(NCPAG), Raul P. de Guzman St., University of the Philippines, Diliman,
Quezon City 1101, Philippines</aff>
</contrib-group>

```

and the author biography is in the <back> section:

```

<back>
<bio>
<p>Erwin A. Alampay is an Associate Professor at the National College of
Public Administration and Governance, University of the Philippines.</p>
</bio>
</back>

```

eXtyle can be configured to link authors to their biographies and to move the biography paragraph into the author's <contrib> element from wherever the paragraph appears in the Word document. This second configuration yields the following XML:

```

<contrib-group>
<contrib contrib-type="author" rid="biol"><name>
<surname>Alampay</surname><given-names>Erwin A.</given-names></name>
<xref ref-type="aff" rid="aff1">1</xref>
<bio id="biol">
<p>*Erwin A. Alampay is an Associate Professor at the National College of
Public Administration and Governance, University of the Philippines.</p>
</bio></contrib>
<aff id="aff1"><label>1</label>National College of Public Administration
and Governance (NCPAG), Raul P. de Guzman St., University of the Philippines,
Diliman, Quezon City 1101, Philippines</aff>
</contrib-group>

```

With linked biographies, the <bio> element can also be placed in within the <back> section of the XML file, depending on your export filter configuration.

Note that linking requires an exact match between the authors' names in the author paragraph and the biography paragraph.

If you require linking between biographies and authors, please contact eXtyle-support@inera.com.

Author Contributions

The JATS and NLM Book DTDs do not contain an element that is specifically designed to accommodate details of authors'

contributions to a study. Within the eXtyles NLM configuration, the most appropriate paragraph style to use is Author_Footnote. There are a couple of limitations to the use of Author_Footnote to accommodate author contribution information. First, each paragraph of the author contribution information will be exported as a separate footnote in the XML. Second, there is no style for a distinct Contributors heading paragraph; a run-in head should be used.

This paragraph in Word, styled as Author_Footnote:

Contributors: Some information about contributors.

would be rendered as follows in the XML by default:

```
<author-notes>
<fn id="afn1"><p><b>Contributors:</b> Some information about
contributors.</p></fn>
</author-notes>
```

More sophisticated handling of author contribution information (for example, inclusion of an fn-type attribute, e.g. fn-type="contributors") would require additional customization of your export filter.

Book Reviews

A book review manuscript should be activated with the Article Type specified as "book review" in the Document Information dialog. Once the document is activated, the bibliographic information for the reviewed work should be split into three paragraphs, one each for the reviewed work author, reviewed work title, and reviewed work publication information. These paragraphs should be styled with the styling palette using the "Book Review - Book Authors", "Book Review - Book Title", and "Book Review - Book Information" buttons on the Front tab, respectively (or their equivalents in your eXtyles configuration).

The following three paragraphs demonstrate styled and processed book review paragraphs (the style names are given in brackets). Note that character styles corresponding to author first name and author surname have been applied to the reviewed work's author during the advanced process Author Processing.

Book_Review_Authors	Richard Heller, Brian Jones
Book_Review_Title	Evidence for population health
Book_Review_Info	New York (NY): Oxford University Press; 2005. 126 pages; ISBN 0-19-852974-0; price: £19.95

This example yields the following XML:

```
<product product-type="book">
  <person-group person-group-type="author">
    <name><surname>Heller</surname><given-names>Richard</given-names></name>
    <name><surname>Jones</surname><given-names>Brian</given-names></name>
  </person-group>
  <source>Evidence for population health</source>
  <year>2005</year>
  <publisher-loc>New York (NY)</publisher-loc>
  <publisher-name>Oxford University Press</publisher-name>
  <year>2005</year>
  <size units="page">126 pages</size>
  <isbn>0-19-852974-0</isbn>
  <price>&pound;19.95</price>
</product>
```

Note that eXtyles has automatically parsed the content of the Book_Review_Info paragraph into sub-elements during export. This part of the XML should be reviewed to confirm that the sub-elements have been identified correctly; please alert Inera at extyles-support@inera.com if this information is misparsed.

Dates

In your eXtles configuration, you may collect dates associated with the manuscript as part of the Document Information dialog. These dates will generally be incorporated directly into the article or book section metadata within the XML file on export.

However, dates associated with the publication process may also be included in the Word file to be rendered in print. Publishers may include dates associated with the manuscript history in a single paragraph or in separate paragraphs. eXtles will automatically identify received, revised, updated, and accepted dates, as well as various dates associated with online posting and publication, and apply the appropriate attribute to the date in the XML file. All of this identification can be done without any special markup in the Word file. The key to this process is the consistent use of wording to identify each date.

This first example has three date paragraphs, all styled as "Document_Date":

Created: 1998-08-31

Updated: 2010-09-14

Revised: 2011-06-16

This example yields the following XML on export:

```
<history>  
<date date-type="created"><day>31</day><month>08</month><year>1998</year></date>  
<date date-type="updated"><day>14</day><month>09</month><year>2010</year></date>  
<date date-type="revised"><day>16</day><month>06</month><year>2011</year></date>  
</history>
```

Alternatively, this single date paragraph:

Received 12 August 2011; Revised 24 October 2011; Accepted 25 October 2011

yields this XML:

```
<history>  
<date date-type="received"><day>12</day><month>08</month><year>2011</year></date>  
<date date-type="rev-recd"><day>24</day><month>10</month><year>2011</year></date>  
<date date-type="accepted"><day>25</day><month>10</month><year>2011</year></date>  
</history>
```

eXtles has some support for French and Russian date descriptions as well as English. For example, this paragraph in Word:

: 31.03.2011 : 11.10.2011

yields this XML:


```
<history>
<date date-type="received"><day>31</day><month>03</month><year>2011</year></date>
<date date-type="accepted"><day>11</day><month>10</month><year>2011</year></date>
</history>
```

Note that the JATS and NLM Book DTDs allow publication dates to be included within <pub-date> or <history> elements. If the former element is used, the type of date is specified by a pub-type attribute.

As can be seen from these examples, eXtyles automatically parses the date into day, month, and year elements. This process is most robust if months are spelled out as words or as abbreviations (both English and French month names are supported) and years are given as four digits. Dates given in the form XXXX-XX-XX (e.g. 2012-05-11) will be parsed as YYYY-MM-DD (i.e. 11th May not 5th November) (see the first example above). If months are given as digits (e.g. 12-08-2010 or 12-08-10), by default, eXtyles will identify the date as MM-DD-YY(YY) (i.e. U.S. date format; December 8th, 2010) and will warn that the date is ambiguous. It is possible to modify the export to omit the warning (if international date format is never encountered) or to treat the international date format [i.e. DD-MM-YY(YY)] as the default (see the Russian example above).

Contact eXtyles-support@inera.com if you have questions about date formats.

The character used to separate the various elements of the date is reasonably flexible: slashes, colons, hyphens, or periods all enable dates to parse correctly.

If particular dates are not available at the time that the XML is exported, eXtyles will allow either X (e.g. XX-XX-XXXX) or two or more Ys, Ms, and Ds (e.g. MM-DD-YYYY) as placeholders that can later be replaced in the XML once the date is known.

Errata

An erratum manuscript should be activated with the Article Type specified as "correction" and the Related Article Type specified as "corrected-article" in the Document Information dialog.

In the body of the document, include a paragraph containing a reference to the article being corrected. This reference paragraph should be styled with the button labeled "Related Article" (in most configurations) on the paragraph styling palette. After the Bibliographic References process has been run, the related article paragraph will be parsed in the same manner as a paragraph in an article's reference list. If a PMID or DOI for the original article can be identified, links will be added during those advanced processes.

Related_Article

<jm>Clum, A., et al. "Complete genome sequence of *Pirellula staleyi* type strain (ATCC 27377T)." *Standards in Genomic Sciences* 1 (2009): 308–16.
doi:10.4056/sigs.51657.</jm>

When exported, this example yields the following XML:

```
<related-article related-article-type="corrected-article" id="ral"
journal-id="Standard Genomic Sci" vol="1" page="308" xlink:href="10.4056/sigs.51657"
ext-link-type="doi"></related-article>
```

Figures, Tables, and Boxes

It is not generally necessary to have separate paragraph styles for the number of the figure, table, or box and the rest of the caption. eXtyles will automatically separate the number from the rest of the caption paragraph, provided that the display item is referred to by a recognized name (e.g. Figure, Fig., Example, Illustration, Table, Box, Video, etc.) and a consistent character (e.g. period, colon) is used to separate the two parts (i.e. caption and label). Special allowance can be made for captions that span more than one paragraph.

For example, this paragraph in the Figure_Caption style:

Figure 8: Government social spending in China (percent of GDP)

would yield this XML:

```
<fig id="f8" position="float" fig-type="figure">
<label>Figure 8</label>
<caption><title>Government social spending in China (percent of GDP)</title></caption>
```

If you need additional terms to be recognized as the label for a figure, table, or box (e.g. "Photo", "Case"), please contact Inera at eXtyles-support@inera.com to arrange for these terms to be added to your configuration.

Learn more about setting up Figures, Tables, and Boxes:

- [Figures](#)
- [Tables](#)
- [Overriding Cited Figure, Table, and Box Placement in the XML](#)

Figures

Figure File Naming

eXtyles has a paragraph style for figure captions. Whenever the XML export encounters a figure caption that starts with a figure number (e.g. "Figure 1"), it will automatically insert a <graphic> element in the XML. The file pointer in the graphic element will follow the naming conventions set up at configuration. The most common format for journals is articleID-f1.

For this example:

Fig_Caption

Figure 8: Government social spending in China (percent of GDP)

Fig_Credit

Sources: Asian Development Bank and US Bureau of Economic Analysis

the full XML output would be:

```
<fig id="f8" position="float" fig-type="figure">
<label>Figure 8</label>
<caption><title>Government social spending in China (percent of GDP)</title></caption>
<graphic xlink:href="9388_007-f8"></graphic>
<attrib>Sources: Asian Development Bank and US Bureau of Economic Analysis</attrib>
</fig>
```

when the article ID from the Document Information dialog is "9388_007".

Default naming conventions are also in place for plates and schemes; plates will be named, for example, articleID-p1 and schemes articleID-s1.

Unlabeled (Unnumbered) Figures

For cases where a figure caption does not have a figure number (e.g. a picture in a book introduction or a journal obituary), the naming system is slightly modified by eXtyles: for example, instead of "f1", an ID of "fa" might be used, e.g. articleID-fa, articleID-fb, etc. For example, the following paragraph in Figure_Caption style:

RMB exchange rates

yields this XML:

```
<fig orientation="portrait" fig-type="figure" position="float" id="fa">
<caption><title>RMB exchange rates</title></caption>
<graphic position="float" xlink:href="9388_007-fa"></graphic>
</fig>
```

All of these default naming schemes can be overridden at the configuration stage. Please contact eXtyles-support@inera.com to discuss custom naming schemes for display items.

For information on inserting graphics that have no caption, see the section on the Insert Tag Menu.

By default, the file type extension is not included in the XML. This is because many publishing environments have multiple versions of each image in different formats and resolutions, and the rendering environment (e.g. Typéfi, transform for HTML) will select the correct version and set the final filename based on the requirements of the target rendering.

Figure Caption Location

Figure captions for numbered figures may be located in the Word file either at the end of the file, or just after the paragraph where each figure is first cited. In either situation, eXtyles will correctly place the figure in the XML file as set up in your configuration.

In the case of unnumbered (such as the previous example) and/or uncited figures, the caption must be placed in the Word file just after the paragraph where the figure should appear in the PDF file or HTML page.

Tables

All tables, or content styled with the Table elements of the paragraph styles palette, must be in Word table format. Otherwise, export is likely to produce parsing errors. All content for each table should be in a single Word table. Splitting content for a single table across multiple Word tables will likely result in incorrect XML and may result in parsing errors.

Tables will be exported to either XHTML or CALS format in the XML file, depending on how your configuration is set up. If the weight and/or style of table borders is significant in your XML and/or you need to support table shading in the XML, we recommend using the XHTML table model, as it has stronger support for borders and shading.

By default, eXtyles does not retain shading on export; contact exstyles-support@inera.com if you need to add support for Word shading in tables.

The more formatting you set correctly in Word, the more that formatting will be correctly reflected in the XML (cell alignment, column widths, cell borders). Note that eXtyles supports the use of the decimal tab in Word tables, as well as left- and right-aligned and centered content.

Alignment

This relatively simple table has been set up with the headings of columns 2 and 3 centered and with the contents of column 1 left aligned, column 2 centered and column 3 aligned on a decimal tab. The cells in the top row carry the Table_Head style, while the other rows are styled as Table_Body.

Strain	Strain	Similarity (%)
A-123	A-123	100.
45720	45720	90.3
NCIMB 2053	NCIMB 2053	8.1

This yields the following XML (with tables exported as XHTML):

```

<table frame="hsides" rules="groups">
<col width="27.12%"/>
<col width="41.94%"/>
<col width="30.94%"/>
<tbody>
<tr>
<td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt"
scope="row">Strain<hr/></td>
<td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">G+C content
(mol%)<hr/></td>
<td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">Similarity
(%)<hr/></td>
</tr>
<tr>
<td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt"
scope="row">A-123<hr/></td>
<td valign="top" align="center" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">68.4<hr/></td>
<td valign="top" align="char" char="." style="border-left: solid 0.50pt; border-top:
solid 0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">100<hr/></td>
</tr>
<tr>
<td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt"
scope="row">45720<hr/></td>
<td valign="top" align="center" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">70.1<hr/></td>
<td valign="top" align="char" char="." style="border-left: solid 0.50pt; border-top:
solid 0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">90.3<hr/></td>
</tr>
<tr>
<td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt" scope="row">NCIMB
2053</td>
<td valign="top" align="center" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">54.0</td>
<td valign="top" align="char" char="." style="border-left: solid 0.50pt; border-top:
solid 0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">8.1</td>
</tr>
</tbody></table>

```

The cells in column 1 have the attribute align="left" and those in column 2 have align="center". The cells in column 3 have the attribute align="char" (i.e. align on a specific character), and they have the additional attribute char="." (i.e. align on the period, used here as a decimal point).

The JATS and NLM Book DTDs support table cell contents aligned on other characters, for example the plus/minus sign in a column of means±errors (i.e. other values of the char attribute are allowed, such as char="±"). However, Word supports alignment only on the first non-letter, non-digit character.

Note that the XML has also inherited the vertical cell alignment set in Word (valign="top"). CSS attributes for table borders and shading are also included in the XML. These can be seen in the previous example as the contents of the style attribute of the <td> element.

Shading

If shading is used in a table, as in this example:

r(Y)	r(Y)	Y
ϕ_m (for η_{high})	ϕ_m (for η_{high})	2.10
ϕ (for η_{limit})	ϕ (for η_{limit})	21.0

the shading is represented as shown in the following XML when exporting with XHTML tables (to save space, the XML in this example represents the second row of the table only):

```
|  |  |
| --- | --- |
| <td valign="top" align="left" style="border-left: solid 0.50pt; border-top: solid 0.50pt; border-right: solid 1.50pt" scope="row">&#x03C6;<sub>m</sub> (for &#x03B7;<sub>high</sub>)</td>   | |

```

Tables and Column Widths

Table width can be represented in the XML using processing instructions (see Typefi Tags section) or as an absolute measurement. eXtyles can detect the absolute width of the table as it appears in Word and pass through the width to the XML export in whatever unit fits your workflow needs (e.g., inches, centimeters, points, etc.). Column widths can be calculated as percentages of the total width of the table or as absolute units of measurement.

eXtyles can also detect the orientation of a table and pass the orientation to the XML; if a table is on a landscape page in Word, the orientation attribute of the table is automatically set to "landscape" in the XML.

The following example illustrates a landscape table whose width is represented in as an absolute width in points and whose column widths are represented as percentages:

r(Y)	Y ²	Y
ϕ_m (for η_{high})	2.10	2.10
ϕ (for η_{limit})	20.5	21.0

```

<table-wrap id="tab_a" orientation="landscape" position="float">
<table width="179">
<col width="55.94%"/>
<col width="22.03%"/>
<col width="22.03%"/>
<thead>
<tr>
<th valign="top" align="justify" scope="col" style="border-left: solid 0.50pt;
border-top: solid 0.50pt; border-right: solid 0.50pt; border-bottom: solid
0.50pt">r(Y)</th>
<th valign="top" align="justify" scope="col" style="border-left: solid 0.50pt;
border-top: solid 0.50pt; border-right: solid 0.50pt; border-bottom: solid
0.50pt">Y2</th>
<th valign="top" align="justify" scope="col" style="border-left: solid 0.50pt;
border-top: solid 0.50pt; border-right: solid 0.50pt; border-bottom: solid
0.50pt">Y</th>
</tr>
</thead>
<tbody>
<tr>
<td valign="top" align="justify" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt" scope="row">m (for
high)</td>
<td valign="top" align="justify" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">2.10</td>
<td valign="top" align="justify" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">2.10</td>
</tr>
<tr>
<td valign="top" align="justify" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt" scope="row">(for
limit)</td>
<td valign="top" align="justify" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">20.5</td>
<td valign="top" align="justify" style="border-left: solid 0.50pt; border-top: solid
0.50pt; border-right: solid 0.50pt; border-bottom: solid 0.50pt">21.0</td>
</tr>
</tbody></table></table-wrap>

```

Note that the column widths can be omitted from the output XML.

Cell Indents

If a paragraph indent is used within a table cell, it is reflected in the XML on export; this allows great control over the arrangement of the table cell contents. Exactly how the indent is represented depends on your configuration. In the following table, the cell contents have been aligned using a first-line indent of 0.5 cm. In this configuration, the paragraph indent is represented in the output XML by a variable number of non-breaking spaces (one for every 0.1 cm):

$r(Y)$	Y^2	Y
ϕ_m (for η_{high})	2.10	2.10
ϕ (for η_{limit})	20.5	21.0

This example is represented by the following XML, exported in CALS format:

```

<table frame="topbot">
<tgroup cols="3">
<colspec colnum="1" colname="col1" colwidth="146"/>
<colspec colnum="2" colname="col2" colwidth="129"/>
<colspec colnum="3" colname="col3" colwidth="129"/>
<tbody>
<row>
<entry valign="bottom" rowsep="1" align="center" colsep="0">r(Y)</entry>
<entry valign="bottom" rowsep="1" align="center" colsep="0">Y<sup>2</sup></entry>
<entry valign="bottom" rowsep="1" align="center" colsep="0">Y</entry>
</row>
<row>
<entry valign="middle" align="left" colsep="0" rowsep="0"><sub>m</sub> (for
<sub>high</sub>)</entry>
<entry valign="middle" align="left" colsep="0" rowsep="0">      2.10</entry><entry
valign="middle" align="left" colsep="0" rowsep="0">      2.10</entry>
</row>
<row>
<entry valign="middle" align="left" colsep="0" rowsep="0"> (for
<sub>limit</sub>)</entry>
<entry valign="middle" align="left" colsep="0" rowsep="0">      20.5</entry>
<entry valign="middle" align="left" colsep="0" rowsep="0">      21.0</entry>
</row>
</tbody>
</tgroup>
</table>

```

Note again that the table borders are represented in the XML file.

Contact eXtyles-support@inera.com if you have questions about the presentation of tables in your XML.

Row Headers

While row headers that appear mid-table is supported by eXtyles, the JATS DTD does not include a way to indicate that a row is a heading row when in mid-table. However, there is a "more correct" way to do this JATS. Simply style the mid-table heading rows with the Table Column Head style. This style forces a new <table> element within the <table-wrap> element. For example, the following table:

Table 1. This is a table title

Head 1	Head 1a	Head 1b
Body 1	Body 1a	Body 1b
Head 2	Head 2a	Head 2b
Body 2	Body 2a	Body 2b

yields this XML:

```
<table frame="hsides" rules="groups">
<thead>
<tr>
<th valign="top" align="left" scope="col">Head 1</th>
<th valign="top" align="left" scope="col">Head 1a</th>
<th valign="top" align="left" scope="col">Head 1b</th>
</tr>
</thead>
<tbody>
<tr>
<td valign="top" align="left" scope="row">Body 1</td>
<td valign="top" align="left">Body 1a</td>
<td valign="top" align="left">Body 1b</td>
</tr>
</tbody>
</table>
<table frame="hsides" rules="groups">
<thead>
<tr>
<th valign="top" align="left" scope="col">Head 2</th>
<th valign="top" align="left" scope="col">Head 2a</th>
<th valign="top" align="left" scope="col">Head 2b</th>
</tr>
</thead>
<tbody>
<tr>
<td valign="top" align="left" scope="row">Body 2</td>
<td valign="top" align="left">Body 2a</td>
<td valign="top" align="left">Body 2b</td>
</tr>
</tbody>
</table>
</table-wrap>
```

Advanced Table Formatting

If you want to specify a row starts on a new page, highlight the row in Word, open the Paragraph Format dialog in Word, and select Page Break Before from the Line and Page Breaks tab. eXtyles then inserts a processing instruction in the XML to start a new page.

```

...
<tbody>
<tr>
<td valign="top" align="center" style="border-left: solid 3px; border-right: solid
1px; border-bottom: solid 1px" scope="row">100</td>
<td valign="top" align="center" style="border-left: solid 1px; border-right: solid
1px; border-bottom: solid 1px">10</td>
<td valign="top" align="center" style="border-left: solid 1px; border-right: solid
3px; border-bottom: solid 1px">45</td>
</tr>
<tr><?Table Page-Break?>
<td valign="top" align="center" style="border-left: solid 3px; border-top: solid 1px;
border-right: solid 1px; border-bottom: solid 1px" scope="row">125</td>
<td valign="top" align="center" style="border-left: solid 1px; border-top: solid 1px;
border-right: solid 1px; border-bottom: solid 1px">11</td>
<td valign="top" align="center" style="border-left: solid 1px; border-top: solid 1px;
border-right: solid 3px; border-bottom: solid 1px">45</td>
</tr>
...

```

If text is rotated in table cells, this is preserved in the XML by including a style attribute `style="transform: rotate(-90deg)"` for that cell:

Probing System	A: without arcuate error correction	$P_x \text{ o } C_y\text{-A}$	$P_x \text{ o } P_y\text{-A}$	$C_x \text{ o } C_y\text{-A}$	$P_{xy}\text{-A}$	$C_{xy}\text{-A}$
	S: without arcuate error or with arcuate error corrected	$P_x \text{ o } C_y\text{-S}$	$P_x \text{ o } P_y\text{-S}$	$C_x \text{ o } C_y\text{-S}$	$P_{xy}\text{-S}$	$C_{xy}\text{-S}$

The above example yields the following XML:

```

<tbody>
<tr>
<td rowspan="2" valign="middle" align="center" style="border-left: solid 3px;
border-top: solid 3px; border-right: solid 1px; border-bottom: solid 3px; transform:
rotate(-90deg)" scope="row">Probing System</td>
<td valign="middle" align="center" style="border-left: solid 1px; border-top: solid
3px; border-right: solid 3px; border-bottom: solid 1px">A: without arcuate error
correction</td>
<td valign="middle" align="center" style="border-left: solid 3px; border-top: solid
3px; border-right: solid 1px; border-bottom: solid 1px">P<italic>x</italic> o
C<italic>y</italic>-A</td>
<td valign="middle" align="center" style="border-left: solid 1px; border-top: solid
3px; border-right: solid 1px; border-bottom: solid 1px">P<italic>x</italic> o
P<italic>y</italic>-A</td>
<td valign="middle" align="center" style="border-left: solid 1px; border-top: solid
3px; border-right: solid 1px; border-bottom: solid 1px">C<italic>x</italic> o
C<italic>y</italic>-A</td>
<td valign="middle" align="center" style="border-left: solid 1px; border-top: solid
3px; border-right: solid 1px; border-bottom: solid 1px">P<italic>xy</italic>-A</td>
<td valign="middle" align="center" style="border-left: solid 1px; border-top: solid
3px; border-right: solid 3px; border-bottom: solid 1px">C<italic>xy</italic>-A</td>
</tr>
...

```

Contact eXtyles-support@inera.com if you have questions about the presentation of tables in your XML.

Table and Box Location in the Word file

Numbered tables and boxes may be located in the Word file either at the end of the file, or just after the paragraph where the item is first cited. In either situation, eXtyles will correctly place the table or box in the XML file as set up in your configuration.

In the case of unnumbered and/or uncited tables and boxes, the table or box must be placed in the Word file just after the paragraph where it should appear in the PDF file or HTML page.

Overriding Cited Figure, Table, and Box Placement in the XML

By default, labeled figures, tables, and boxes are moved to immediately after the paragraph in which they are first cited, as described in the previous sections, “[Figure Caption Location in the Word File](#)” and “[Table and Box Location in the Word File](#).”

You can override this behavior by using the `cite_fig_nomove`, `cite_tbl_nomove`, and `cite_box_nomove` character styles. For example, if Table 8 is mentioned in the Introduction of your manuscript, and you do not actually want to put Table 8 just after that paragraph, you can apply `cite_tbl_nomove` to the citation in the Introduction paragraph. The citation in the Introduction will still be converted to a link in the XML, but the table will be moved to where it is next cited in the document (for example, following the paragraph in which the next Table 8 citation with `cite_tab` applied is located).

These character styles should be manually applied after running Citation Matching. If these character styles are not currently included in your configuration, please contact eXtyles Support.

Footnotes

Complex Footnotes

eXtyle can handle even the most complex of footnotes, provided your configuration has been set up to deal with them. Footnotes can be divided into the following four categories, of increasing complexity and hopefully decreasing frequency.

A single paragraph of text

This should use the appropriate footnote, note or endnote style. For example:

Footnote	* Some variables, such as measures of income inequality and degree of financial openness, are not included in our study because of the limited availability of good-quality data across countries over the sample period.
----------	---

which gives this XML:

```
<fn id="FN1">
<label>*</label>
<p>Some variables, such as measures of income inequality and degree of financial
openness, are not included in our study because of the limited availability of
good-quality data across countries over the sample period.</p>
</fn>
```

Two or more paragraphs of text

The first paragraph should carry the appropriate footnote, note or endnote style. The second and subsequent paragraphs will require a "Footnote_Continued" style.

Footnote	* Whether a country's currency is undervalued depends on the concept of the yardstick (i.e. the fundamental equilibrium exchange rate) used to measure its undervaluation. Cheung et al. (2007) provides a brief review of some of those concepts and discusses the difficulty in measuring the equilibrium exchange rate and the uncertainty surrounding those measurements.
FootnoteContinued	Most analysts have concluded that the Chinese currency has been significantly undervalued.

which gives this XML:

```

<fn id="FN2">
<label>*</label>
<p>Whether a country's currency is undervalued depends on the concept of the
yardstick (i.e. the fundamental equilibrium exchange rate) used to measure its
undervaluation. <xref ref-type="bibr" rid="R13">Cheung et al. (2007)</xref> provides a
brief review of some of those concepts and discusses the difficulty in measuring the
equilibrium exchange rate and the uncertainty surrounding those measurements.</p>
<p>Most analysts have concluded that the Chinese currency has been significantly
undervalued.</p>
</fn>

```

One or more paragraphs of text with unnumbered table(s) and/or list(s) of defined objects

In some cases, your lists may include one or more unnumbered tables (without a table caption) and/or one or more of a list of defined objects that might include lists and display equations. The first text paragraph carries the appropriate footnote style, and any subsequent text paragraphs carry the "Footnote_Continued" style. Note that two lists would need to be separated by another paragraph(s) that did not carry a list style; otherwise, they would be combined into a single list (this is true anywhere in the document).

Footnote	3. This can be shown if we derive the saving equation from a typical Keynesian consumption equation, $C = C_0 + \alpha Y$, where C is consumption, C_0 is the subsistence consumption, Y is income, and α is the propensity to consume. The corresponding saving equation would be $S = C_0 + (1 - \alpha)Y$ implying that
Equation	$\frac{S}{Y} = (1 - \alpha) - \frac{C_0}{Y}$
FootnoteContinued	Thus
Equation	$\frac{d(S/Y)}{dY} > 0$
FootnoteContinued	the saving/income ratio is a positive function of income.

which gives this XML:

```

<fn id="FN3">
<label>3</label>
<p>This can be shown if we derive the saving equation from a typical Keynesian
consumption equation, <inline-formula><inline-graphic
xlink:href="9388_007-m3"/></inline-formula>, where C is consumption,
<inline-formula><inline-graphic xlink:href="9388_007-m4"/></inline-formula>is the
subsistence consumption, Y is income, and <inline-formula><inline-graphic
xlink:href="9388_007-m5"/></inline-formula> is the propensity to consume. The
corresponding saving equation would be <inline-formula><inline-graphic
xlink:href="9388_007-m6"/></inline-formula>, implying that</p>
<p><disp-formula id="E"><inline-formula><inline-graphic
xlink:href="9388_007-m7"/></inline-formula></disp-formula></p>
<p>Thus</p>
<p><disp-formula id="E1"><inline-formula><inline-graphic
xlink:href="9388_007-m8"/></inline-formula></disp-formula></p>
<p>the saving/income ratio is a positive function of income.</p>
</fn>

```

Note that "9388_007" in the previous example is a document identifier, entered using the document information dialog.

Notes that contain objects not explicitly supported in your export

In this last case, it would be necessary to use NoteBegin and NoteEnd container tags at the beginning and end of the footnote if it contains any of the items mentioned above, as well as another object(s) for which explicit provision had not been made in your export filter. This is shown in the following example. Note that these paragraph styles are not included by default and would require custom configuration work.

Contact eXtyles-support@inera.com if you believe that your content is likely to include complex footnotes.

NotesBeg Notes Begin	NoteBegin
Footnote	4. See Easterly et al. (1997) for stylized facts and empirical findings that suggest shocks are important relative to country characteristics in determining long-run growth. Relatedly, in their attempt to interpret the experience of the East Asian countries in the context of the habit-formation model, Carroll et al. (2000) write:
Quote	<i>"The evidence in William Easterly et al. (1997) suggests that the best way to model the growth experiences in the East Asian countries is as a series of positive shocks. Thus we might interpret the East Asian experience as a sequence of exogenous increases in the 'broad capital' embodied in k in our model. . . . One prediction of our model is that saving rates in the East Asian countries should decline once those economies stop their technological convergence with more advanced economies."</i>
FootnoteContinued	(p. 351)
NotesEnd Notes End	NoteEnd

which gives this XML:

```

<fn id="FN4">
<label>4</label>
<p>See <xref ref-type="bibr" rid="R21">Easterly et al. (1997)</xref> for stylized
facts and empirical findings that suggest shocks are important relative to country
characteristics in determining long-run growth. Relatedly, in their attempt to
interpret the experience of the East Asian countries in the context of the
habit-formation model, <xref ref-type="bibr" rid="R10">Carroll et al. (2000)</xref>
write:</p>
<disp-quote>&ldquo;The evidence in William Easterly et al. (1997) suggests that the
best way to model the growth experiences in the East Asian countries is as a series of
positive shocks. Thus we might interpret the East Asian experience as a sequence of
exogenous increases in the &lsquo;broad capital&rsquo; embodied in <italic>k</italic>
in our model. . . . One prediction of our model is that saving rates in the East Asian
countries should decline once those economies stop their technological convergence
with more advanced economies.&rdquo;</disp-quote>
<p>(p. 351)</p>
</fn>

```

Notice that the footnote number is automatically parsed within the <label> element without requiring any specific formatting or styling. There are some restrictions on the format of the footnote number: it must be either (a) superscript or (b) on the baseline but followed by one of a period or a closing parenthesis. Superscript letters are also supported.

Automatic Identification of Footnote Types

eXtyles can be set up to use a customer-specific list of phrases to identify various footnote types automatically with an fn-type attribute during export. This list might typically include equal contributions, current or previous addresses, membership of study groups, or information about data supplements.

This footnote:

†These authors contributed equally to this work.

gives this XML:

```

<fn id="fn1" fn-type="equal"><label>&dagger;</label>
<p>These authors contributed equally to this work</p></fn>

```

This matching will work only if the key phrase included in the list used by eXtyles is found in the wording of the footnote.

Contact eXtyles-support@inera.com if you would like to discuss setting up automatic identification of footnotes.

It is also possible to use a distinct paragraph style to identify particular classes of footnotes, such as conflicts of interest or financial disclosures. In this case, there is no restriction on the wording of the footnote. This option would be appropriate if it were necessary to apply an fn-type attribute to a class of footnotes that did not include any standard forms of words.

Word Footnotes and Endnotes

Microsoft Word has its own built-in footnote and endnote functionality. By default, text in Word footnotes and endnotes is not accessible to eXtyles processes such as Auto-Redact, Citation Matching, and URL Checking. For this reason, by default, eXtyles NLM will flatten Word footnotes and endnotes to plain text and place them at the end of the document, styling them using the Footnote style defined in your configuration.

It can be necessary in certain workflows to retain Word footnotes and endnotes in the original Word format, for instance if your workflow involves printing to PDF from Word as well as exporting XML. Please email eXtyles-support@inera.com if you would like to discuss this option.

To learn more, read [eXtyles and Footnotes/Endnotes](#).

Hyperlinks

In a standard eXtyles configuration, URLs in the Word file will be exported automatically as hyperlinks in the XML:

<http://www.inera.com>

```
<ext-link ext-link-type="uri"
xlink:href="http://www.inera.com">http://www.inera.com</ext-link>
```

By default, **Cleanup** is set up to "flatten" any hyperlinks in the text so that the text that is displayed matches the URL that the hyperlink points to. This is generally the desired behavior for content that will appear in print (so that the reader of the print version can see the URL target).

For electronic-only content, the text that is displayed for the hyperlink can be different from the URL that the hyperlink points to:

[Inera website](http://www.inera.com)

```
<ext-link ext-link-type="uri" xlink:href="http://www.inera.com">Inera
website</ext-link>
```

If you require eXtyles to support distinct display text and target URLs in the XML output, contact eXtyles-support@inera.com.

Keywords, Abbreviations, and Glossaries

eXtyles will automatically parse keywords, abbreviations, and glossary paragraphs to XML keyword groups or definition lists, according to certain standard editorial styles. In particular, they must be segmented consistently into their various elements.

Keywords

Unless otherwise specified in your export filter, the strongest symbols to separate keywords are semicolons, em dashes, and bullets. These characters are highly unlikely to occur within the text of a single keyword. If eXtyles finds one of these characters within the keywords paragraph, it will use that character to separate the paragraph into individual keywords. If eXtyles fails to find either semicolons or bullets in the keyword paragraph, it will try weaker characters in an attempt to parse the list. These characters are tabs, em spaces, commas (followed by a space), and slashes with spaces on either side.

The following Word paragraph will be correctly processed during XML export:

Keywords: bone marrow-derived macrophages; dihydrofolate; site-directed mutagenesis

to yield the following XML:

```
<kwd-group>
<title><bold>Keywords:</bold> </title>
<kwd>bone marrow-derived macrophages</kwd>
<kwd>dihydrofolate</kwd>
<kwd>site-directed mutagenesis</kwd>
</kwd-group>
```

eXtyles will also automatically parse specialized keyword vocabularies such as PACS, OCIS, or JEL codes.

Abbreviations

For the purposes of eXtyles, an "Abbreviations" paragraph is a list of two or more term–definition pairs in a single paragraph.

For parsing of abbreviations, eXtyles uses strong and weak characters in turn to attempt to separate the paragraph into its elements. The strong characters are tabs, (semi)colons, and em dashes. Weak characters are en dashes and commas.

Consistent use of strong separator characters is crucial to obtaining accurate XML.

Examples of Abbreviations paragraphs that will yield correct XML include:

ExPEC, extra-intestinal pathogenic Escherichia coli; SSTI, skin and soft-tissue infection; UTI, urinary tract infection.

ExPEC — extra-intestinal pathogenic Escherichia coli: SSTI — skin and soft-tissue infection: UTI — urinary tract infection.

These various styles will yield the following XML:

```

<def-list list-type="simple" list-content="abbreviations">
<def-item>
<term>ExPEC</term>
<def><p>extra-intestinal pathogenic <italic>Escherichia coli</italic></p></def>
</def-item>
<def-item>
<term>SSTI</term>
<def><p>skin and soft-tissue infection</p></def>
</def-item>
<def-item>
<term>UTI</term>
<def><p>urinary tract infection</p></def>
</def-item>
</def-list>

```

The characters that are used to separate the abbreviation and definition and the abbreviation–definition pairs generally cannot be used within an abbreviation or definition. For example, the following abbreviations list would not be parsed correctly because a comma appears in the first definition:

Abbreviations: ExPEC, extra-intestinal, pathogenic *Escherichia coli*; UTI, urinary tract infection.

Glossary

For the purposes of eXtyles, a "Glossary" is a multi-paragraph list with one term–definition pair per paragraph. This definition allows rather more flexibility in style. As with abbreviations, consistent use of a strong separator character is crucial to obtaining accurate XML. The glossary section must always appear in the <back> section of your XML.

The following paragraphs would parse to give correct XML:

1) Term in bold

ExPEC Extra-intestinal pathogenic *Escherichia coli*

SSTI Skin and soft-tissue infection

UTI Urinary tract infection

2) Tab separating term and definition

ExPEC Extra-intestinal pathogenic *Escherichia coli*

SSTI Skin and soft-tissue infection

UTI Urinary tract infection

3) Colon, equal sign, or other "strong" separator separating term and definition

ExPEC: Extra-intestinal pathogenic *Escherichia coli*

SSTI: Skin and soft-tissue infection

UTI: Urinary tract infection

These various styles each yield the following XML:

```
<glossary>
<def-list>
<def-item>
<term>ExPEC</term>
<def><p>Extra-intestinal pathogenic Escherichia coli</i></p></def>
</def-item>
<def-item>
<term>SSTI</term>
<def><p>Skin and soft-tissue infection</p></def>
</def-item>
<def-item>
<term>UTI</term>
<def><p>Urinary tract infection</p></def>
</def-item>
</def-list>
</glossary>
```

Definition List

Similar to a "Glossary" (described above), a "Definition List" is a multi-paragraph list with one term–definition pair per paragraph. As with abbreviations and glossary entries, consistent use of a strong separator character is crucial to obtaining accurate XML. A Definition List is exactly the same as as a Glossary except that a definition list can occur in-line in the body text, while a glossary must appear in the backmatter.

Letter to the Editor

Letter to the Editor with Related Article

A letter to the editor submitted in response to a published article should be activated with the Article Type specified as "letter" and the Related Article type specified as "commentary-article".

In the body of the letter, a paragraph containing the reference to the article being commented on should be included, and it should be styled with the button labeled "Related Article" on the Front tab of the paragraph styling palette. After the Bibliographic References process has been run, the related article paragraph will be parsed in the same manner as a paragraph in an article's reference list. If a PMID or DOI for the original article can be identified, links will be added during those advanced processes.

Related_Article

<jm>Vuitton DA, Zhou H, Bresson-Hadni S, Wang Q, Piarroux M, Raoul F, et al. Epidemiology of alveolar echinococcosis with particular reference to China and Europe. *Parasitology* 2003; 127(Supplement 1): S87–107. doi:10.1017/S0031182003004153</jm>

This example yields the following XML:

```
<related-article related-article-type="commentary-article" id="ra1"
journal-id="Parasitology" vol="127" page="S87" xlink:href="10.1017/S0031182003004153"
ext-link-type="doi"></related-article>
```

Letter to the Editor with Reply

A document containing both a letter to the editor and a reply letter should be activated as in the preceding section, "Letter to the Editor with Related Article" (i.e. the Article Type specified as "letter" and the Related Article type specified as "commentary-article"), and should have the related article's reference handled similarly. The article ID of the letter to the editor should be specified as the Article ID in the Document Information Dialog.

Because the letter and reply are separate items, you must add a tag from the eXtyles Insert Tag menu that marks the boundary between the two items. To insert the <reply> tag, place the cursor just before the first start of the reply and select Reply from the eXtyles Insert Tag menu (if this tag is available).

If the reply does not have an ID that differs from the letter, you do not need to make any further change to the tag. However, if the reply has an ID that is different from the letter, the ID should be typed between the tags <reply> and </reply>, as shown later in this section.

If a letter is accompanied by more than one reply, you just need to add the <reply> tag at the start of each additional reply.

If a reply is part of the same Word (and XML file) as the letter, no related article paragraph need be used for the reply. However, if it is published in a separate XML file, then a related article paragraph must be set up in the same manner as shown previously for the letter.

The following paragraphs form a model of a Word file containing a letter and a reply:

Related_Article	<jrn>Smith, J. "Article title of original item." Inera Med J. 56 (2006): 45-48.</jrn>
Article_Title	Letter to the Editor
Paragraph	Dear Editor,
Paragraph	I take issue with the article published in volume 56, page 45, of your publication.
Authors	Bruce Rosenblum
Affiliations	Inera Inc.
Paragraph	<reply>LE54321</reply>Dear Correspondent:
Paragraph	I hereby reply to your letter.
Authors	Liz Blake
Affiliations	Inera Inc.

The XML generated from this document would include the following (note that some of the document metadata tags have been omitted from this example):

```

<article>
<front>
<article-meta>
<title-group>
<article-title>Letter to the Editor</article-title>
</title-group>
<contrib contrib-type="author">
<name
name-style="western"><surname>Rosenblum</surname><given-names>Bruce</given-names></name>
</contrib>
<aff id="aff-1-1">Inera Inc.</aff>
</contrib-group>
<related-article page="45" vol="56" journal-id="Inera Med J." id="ral"
related-article-type="commentary-article"></related-article>
</article-meta>
</front>
<body>
<p>Dear Editor,</p>
<p>I take issue with the article published in volume 56, page 45, of your
publication.</p>
</body>
<response xml:lang="en" id="sal" response-type="reply">
<front>
<article-meta>
<article-id pub-id-type="publisher-id">LE54321</article-id>
<title-group>
<article-title></article-title>
</title-group>
<contrib-group>
<contrib contrib-type="author">
<name
name-style="western"><surname>Blake</surname><given-names>Liz</given-names></name>
</contrib>
<aff id="aff-2-1">Inera Inc.</aff>
</contrib-group>
</article-meta>
</front>
<body>
<p>Dear Correspondent:</p>
<p>I hereby reply to your letter.</p>
</body>
</response>
</article>

```

Alternate Forms for the <related-article> Element

Note that the <related-article> element can be represented in two ways, depending on your eXtyle configuration. In the previous example, the article details are given in a number of attributes of the <related-article> tag:

```

<related-article page="45" vol="56" journal-id="Inera Med J." id="ral"
related-article-type="commentary-article"></related-article>

```

The alternative is for the related article to be represented by the full contents of the Related_Article paragraph, as shown in the next example:

Related_Article

<jm>Vuitton, D. A., et al. "Epidemiology of alveolar echinococcosis with particular reference to China and Europe." Parasitology 127, Suppl (2003): S87-107.</jm>

would yield this XML:

```
<related-article id="ral" related-article-type="commentary-article">
<string-name><surname>Vuitton</surname> <given-names>DA</given-names></string-name>,
<string-name><surname>Zhou</surname> <given-names>H</given-names></string-name>,
<string-name><surname>Bresson-Hadni</surname>
<given-names>S</given-names></string-name>, <string-name><surname>Wang</surname>
<given-names>Q</given-names></string-name>, <string-name><surname>Piarroux</surname>
<given-names>M</given-names></string-name>, <string-name><surname>Raoul</surname>
<given-names>F</given-names></string-name>, <etal/>
<article-title>Epidemiology of alveolar echinococcosis with particular reference to
China and Europe.</article-title>
<source>Parasitology</source>. <year>2003</year>;
<volume>127</volume> (<supplement>Suppl</supplement>):
<fpage>S87</fpage>&#x2013;<lpage>107</lpage>.
<pub-id pub-id-type="pmid">15027607</pub-id></related-article>
```

Lists

In a standard eXtyles configuration, a group of contiguous list paragraphs will be exported as a single XML list. Nested lists should be styled carefully to ensure that the nesting is reflected in the paragraph styles used. See the following example of a nested list:

- | | |
|----------------|--|
| Num_Bul_List_1 | • Extrapyramidal dysfunction, including one or more of the following: |
| Num_Bul_List_2 | o Dystonia |
| Num_Bul_List_2 | o Rigidity |
| Num_Bul_List_2 | o Choreoathetosis |
| Num_Bul_List_1 | • Onset |
| Num_Bul_List_2 | o Classic form. Usually in first decade of life |
| Num_Bul_List_2 | o Atypical form. More often in the second or third decade of life |
| Num_Bul_List_1 | • Loss of ambulation |
| Num_Bul_List_2 | o Classic form. Often occurring within ten to 15 years of onset |
| Num_Bul_List_2 | o Atypical form. Often occurring within 15 to 40 years of onset |

This yields the following XML:

```
<list id="L1" list-type="bullet">
<list-item><p><b>Extrapyramidal dysfunction,</b> including one or more of the
following:</p>
<list id="L2" list-type="bullet">
<list-item><p>Dystonia</p></list-item>
<list-item><p>Rigidity</p></list-item>
<list-item><p>Choreoathetosis</p></list-item>
</list>
</list-item>
<list-item><p>Onset</p>
<list id="L3" list-type="bullet">
<list-item><p><b>Classic form.</b> Usually in first decade of
life</p></list-item>
<list-item><p><b>Atypical form.</b> More commonly in the second or third decade
of life</p></list-item>
</list>
</list-item>
<list-item><p>Loss of ambulation</p>
<list id="L4" list-type="bullet">
<list-item><p><b>Classic form.</b> Often occurring within ten to 15 years of
onset</p></list-item>
<list-item><p><b>Atypical form.</b> Often occurring within 15 to 40 years of
onset</p></list-item>
</list>
</list-item>
</list>
```

Note that the level-1 list L1 is not closed when the first of the level-2 list starts, and in the XML lists L2, L3, and L4 are nested within list L1.

By default, eXtyle does not include a <label> element containing the bullet character for bulleted lists (compare the numbered list shown below).

Contact eXtyle-support@inera.com if you need the bullet character to be exported as part of the XML.

Multi-paragraph List Items

If a single item in the list is made up of more than one paragraph, a List Continued style must be used for the continuation paragraphs; otherwise, the subsequent paragraphs will be exported as separate list items. Also, if it is necessary to interrupt a list with a non-list paragraph, such as a quote, and then continue the list, you will need a specific paragraph style (e.g. Quote in List) to allow that paragraph to appear in the list without causing the list to end in the XML file and to restart after the interposed paragraph. See the following example:

Num_Bul_List_1	1. rs1799759 has variation as -/ACCAT, and rs3832852 has the variation as -/CCATA. If you put the variation in flanking context, the two different chromosome sequences are:
Preformat	rs1799759 (-/ACCAT) C-----AG CACCATAG rs3832852 (-/CCATA) CA-----G CACCATAG
List_1_Continued	The deleted sequences above for the two refSNPs are shifted one base, so they remain separate SNPs. Currently in dbSNP, we do not have validation (freq or genotype) information for either of these two SNPs.
Num_Bul_List_1	2. rs3832850 and rs35904656 are 5 bases apart in mapping, and are therefore distinct SNPs.

which would yield this XML (note that
 represents the line-break character, which is retained in the <preformat> element):

```
<list id="L1" list-type="order">
<list-item>
<label>1</label>
<p>rs1799759 has variation as -/ACCAT, and rs3832852 has the variation as -/CCATA. If
you put the variation in flanking context, the two different chromosome sequences
are:</p>
<preformat>rs1799759
(-/ACCAT)<br/>C-----AG<br/>CACCATAG<br/><br/>rs3832852
(-/CCATA)<br/>CA-----G<br/>CACCATAG<br/></preformat>
<p>The deleted sequences above for the two refSNPs are shifted one base, so they
remain separate SNPs. Currently in dbSNP, we do not have validation (freq or genotype)
information for either of these two SNPs.</p>
</list-item>
<list-item>
<label>2</label>
<p>rs3832850 and rs35904656 are 5 bases apart in mapping, and are therefore distinct
SNPs.</p>
</list-item>
```

Lists in Tables

Lists in tables should be styled using the appropriate list style, rather than using the table styles. You can apply the list style to a unique paragraph in a table cell by holding the CTRL key while selecting the style from the palette. For example, the

following table uses a Table Body style for the regular cell content and the appropriate List styles for the list content:

Table header	Table header	Table header
Table body	Table body	1. Number list style
	- Bullet list	2. Number list style
	- Bullet list	3. Number list style

Depending on your configuration, lists in boxes may require their own distinct paragraph styles to avoid closing the box in the XML file.

Tables that have no caption (typically used to align two or more columns of information) can be included in lists without special modification. "Floating" items, such as figures, tables, or boxes, should not be placed within lists in the Word file unless your configuration includes specific provision for them to be placed there.

It is possible to interrupt a numbered list with, say, a heading and then continue the list without restarting the numbering at "1". This requires used of the List Continued tag, described later in this section in the discussion of the Insert Tag menu. This tag is not included in eXtyles by default; contact eXtyles-support@inera.com if you think it is likely that you will need this feature.

Math Equations

The JATS and NLM Book DTDs allow math to be encoded in a number of ways: as MathML, as a pointer to an image file, or as a combination of the two. How your export has been set up depends on the uses that are going to be made of your XML and the needs of any downstream partners such as compositors and online hosts.

Design Science MathType must be installed for eXtyle to generate MathML or image files of your equation objects.

For example, this MathType equation:

Equation  

when exported as MathML, gives this XML:

```
<disp-formula id="e2">
  <mml:math id="m1">
    <mml:mrow>
      <mml:msqrt>
        <mml:mrow>
          <mml:msup>
            <mml:mi>a</mml:mi>
            <mml:mn>2</mml:mn>
          </mml:msup>
          <mml:mo>+</mml:mo><mml:msup>
            <mml:mi>b</mml:mi>
            <mml:mn>2</mml:mn>
          </mml:msup>
        </mml:mrow>
      </mml:msqrt>
    </mml:mrow>
  </mml:math>
  <label>(2)</label>
</disp-formula>
```

Note that the values of the `<mml:math>` id attribute are allocated sequentially on export and do not necessarily correspond to any equation number used in the text [if, in this example, equation (1) had been typed from the keyboard, so that equation (2) was the first MathType object in the document]. Values of the `<disp-formula>` id attribute are based on the equation numbers. Values of the `<disp-formula>` id attribute for unnumbered equations are treated similarly to unnumbered figures and tables: the first equation is "e", the second is "e__1", etc.

If the export is instead set to add graphic pointers to equations, the following XML is output:

```
<graphic position="anchor" xlink:href="9388_007-m1"
xlinkns:xlink="http://www.w3.org/1999/xlink"/>
```

where 9388_007 is the document ID, set in the Document Information dialog. Note that, by default, the file extension is not included in the XML (see the previous discussion). The default naming convention for equation images is based on the

document ID and "mn", where n is the sequential number of the equation object (note that this is not related to any equation numbers that may or may not be associated with the equation in the text).

If both MathML and pointers to images are required, the output XML looks like this (note that the contents of the equation have been omitted for the sake of brevity) in versions of the Journal Publishing and Book DTDs up to 3.0:

```
<disp-formula id="e2">
<mml:math id="m1">...</mml:math>
<graphic position="anchor" xlink:href="123-m1"
xmlns:xlink="http://www.w3.org/1999/xlink"/>
</disp-formula>
```

In JATS, the <alternatives> element is available. In this case, the output XML would look like this:

```
<disp-formula id="e2">
<alternatives>
<mml:math id="m1">...</mml:math>
<graphic position="anchor" xlink:href="123-m1"
xmlns:xlink="http://www.w3.org/1999/xlink"/>
</alternatives>
</disp-formula>
```

The presence of the <alternatives> element makes it easier for rendering engines to determine that only one or other of the two outputs should be used.

eXtyle supports equations added by authors with the Microsoft Equation Builder, the default equation editor in Word 2007 and later versions, and also the older Microsoft Equation 3.0 format (still accessible in Word 2007 and 2010, from the Insert Object menu) and MathType, the "parent" of Microsoft Equation 3.0. Any of these formats will be correctly exported as math according to the configuration of your export filter.

For all equation objects, Design Science MathType must be installed for eXtyle to generate MathML or image files of your equation objects.

Please contact eXtyle-support@inera.com if you have questions about export of math from your documents.

Problems with Math in XML

Commonly encountered problems with the correct export of math include:

Equations are not actually math objects

If equations have been inserted into the text as objects other than those listed previously (for example, as pictures), they will not be exported as math. Depending on your eXtyle configuration, they will be exported as inline graphics or they will be dropped entirely from the XML file.

A common reason for equations appearing as images in the Word file is if a Word 2007/2010 DOCX file containing Word

Equation Builder objects has been saved as a Word 2003 DOC file. As the Equation Builder is not backward compatible with Word 2003, the equations are saved as images instead. To avoid this problem, Equation Builder objects should be converted to MathType equations using the Convert Equations function (see the following figure) on the MathType menu/ribbon before saving the file to DOC format from DOCX.

Note that "Word 2007 and later (OMML) equations" must be selected under "Equation types to convert," and "Convert equations to" must be set to "MathType equations (OLE objects)."

If an author has saved a file containing Equation Builder math as a DOC file without first converting the equations, these equations may be recovered by re-saving the file in DOCX format using Word 2007 or 2010 (Microsoft calls this process "rehydration"). After resaving the file, you should reconfirm that the equations are now editable Equation Builder objects. At this stage, we recommend you convert the equations to MathType using the instructions given earlier.

Equation numbers included as part of the equation

eXtyles will automatically parse numbered equation paragraphs, enabling linking of equation citations and generating correct XML. However, this functionality is not available if the equation numbers have been added as part of the equation object itself. The equation numbers must be removed from the equation objects and added as text to the paragraph containing the equation (see the previous example).

Equation images not exported

If your NLM XML export generates pointers to image files for math, these image files must also be exported. This can be automated as part of your eXtyles XML export: if you do not have automatic export of math enabled, the images must be exported manually from the MathType menu/ribbon in Word using the Export Equations function.

Notes about Equation Builder Math

Microsoft Equation Builder math cannot be exported as image files; these equations can only be exported as MathML (when MathType is installed). Microsoft's MathML is not the same as the MathML produced by MathType. For consistency in your XML archive, we recommend that all math be converted to MathType in your workflow.

Should you choose to keep equations in Equation Builder format, be advised that Microsoft makes extensive use of Plane 1 Unicode in Equation Builder; many applications that render MathML do not have full support for Plane 1 Unicode, and end-user systems viewing MathML may not have font sets that include Plane 1 Unicode.

Notes about Export of Equation Images from Word using MathType

MathType has a number of settings that control the export of math equations from Word (see the previous figure). These include:

1. The folder that the equations are exported to
2. The format of the equation files (.eps, .gif or .wmf)
3. The filename pattern that will be used for the exported files

Automatic math export will ensure that these options are set correctly. For manual export, these settings must match the

settings used in your XML export so that the image files match the pointers included in the XML.

It is also possible to set other properties for exported GIF files, and such changes may be required by downstream applications such as composition or online hosting. To access these settings, open a MathType object in Word and select Preferences: Web and GIF Preferences. From this menu, you can set:

1. **The resolution of the image (up to 1000 d.p.i.).** By default, this is set to the current screen resolution (typically 72 or 96 d.p.i.), which would be fine for online use but would give unsatisfactory results if the images are used for printing. Setting a higher resolution will give better results when the images are printed
2. **The color of the bitmap background.** By default, this is set to white. It can be set to transparent, which would be needed if the images are to be printed onto a colored substrate or used online on a colored background.

These settings are stored on a user's computer, so they need to be set only once for any machine used to export math images. The settings will also be picked up by the eXtyles automated math image export.

Poems

Poetry may appear in any document type. The verses of the poem should be styled with the appropriate style (e.g. Poetry, Verse, etc.) from your style palette, and the author should be styled with the style used for author names.

If whitespace is relevant to the poem's formatting and should be preserved, the style for preformatted text (if available) may be used rather than "Poetry" or equivalent. Please refer to the documentation on the DTD (available at <http://dtd.nlm.nih.gov/public/shing/tag-library/n-qu60.html>) for guidelines on using "Poetry" versus "Preformatted Text".

Where separate stanzas should be represented in the XML with a <verse-group> element, an empty paragraph styled "Poetry" should be inserted between the lines that begin and end their respective stanzas:

Poetry	An old willow with hollow branches
Poetry	slowly swayed his few high bright tendrils
Poetry	and sang:
Poetry	
Poetry	Love is a young green willow
Poetry	shimmering at the bare wood's edge.

This example yields the following XML:

```
<verse-group>
<verse-line>An old willow with hollow branches</verse-line>
<verse-line>slowly swayed his few high bright tendrils</verse-line>
<verse-line>and sang:</verse-line>
</verse-group>
<verse-group>
<verse-line>Love is a young green willow</verse-line>
<verse-line>shimmering at the bare wood's edge.</verse-line>
</verse-group>
```

Reference Lists

In a standard eXtyles NLM XML export, a reference list can contain a single title paragraph (e.g., "Reference Head") and references only.

Additional paragraph styles can be used to tag introductions to a reference list or annotation paragraphs for a specific reference. The "Reflist_Introduction" style may be used to style one or more paragraphs after a reference head and before the start of a reference list that introduce the reference list. It may not be used at any other location in a reference list. This differs from "Reference_Annotation" which is used to give additional information about specific references (typically in Review articles).

If you need to subdivide a reference list with subheadings, introduce the list with a paragraph of text, or add annotations to explain the significance of particular references, you will require additional paragraph styles and alterations to the export filter; please contact eXtyles-support@inera.com.

If your publication includes both a list of references that are cited in the document and a list of references that should be fully tagged by eXtyles processing but are not cited in the document (e.g., Further Reading), you can use a "References" style for cited references and a "Bibliography" style for references that are not cited. Both styles must be used in the document for the Bibliography references to remain uncited throughout eXtyles processing.

Sponsors/Funders in Acknowledgments

Contract Sponsor and Number

In JATS or NLM XML export configurations, eXtyles can be set up to provide two Word character styles that support tagging of funding source and award number information for acknowledgment of grant-funded research support. In the following example, the character styles Contract-Sponsor and Contract-Number have been applied to their respective items:

This work was funded by the **European Community** (NATT HEALTH-F3-2008-222965) and the **UK Medical Research Council** (programme number U1175 32056).

which results in the following XML in the <article-meta> or <book-part-meta> element when exporting to JATS 1.0 or version 3.0 of the NLM Book or Journal Publishing DTD:

```
<funding-group>
<award-group id="sp1">
<funding-source>European Community</funding-source>
<award-id>NATT HEALTH-F3-2008-222965</award-id>
</award-group>
<award-group id="sp2">
<funding-source>UK Medical Research Council</funding-source>
<award-id>U1175 32056</award-id>
</award-group>
</funding-group>
```

and the following XML for the Acknowledgments section:

```
<p>This work was funded by the
<funding-source rid="sp1">European Community</funding-source>
(<award-id rid="sp1">NATT HEALTH-F3-2008-222965</award-id>)
and the <funding-source rid="sp2">UK Medical Research Council</funding-source>
(programme number <award-id rid="sp2">U1175 32056</award-id>).</p>
```

According to version 2.3 of the Journal or Book DTD, the following XML is generated in <article-meta> or <book-part-meta>:

```
<contract-num id="sp1">NATT HEALTH-F3-2008-222965</contract-num>
<contract-num id="sp2">U1175 32056</contract-num>
<contract-sponsor id="sp1">European Community</contract-sponsor>
<contract-sponsor id="sp2">UK Medical Research Council</contract-sponsor>
```

and the following XML for the Acknowledgments section:

```
<p>This work was funded by the <contract-sponsor rid="sp1">European
Community</contract-sponsor> (<contract-num rid="sp1">NATT
HEALTH-F3-2008-222965</contract-num>) and the <contract-sponsor rid="sp2">UK Medical
Research Council</contract-sponsor> (programme number <contract-num rid="sp2">U1175
32056</contract-num>).</p>
```

During export, eXtyles links a funding source with any award numbers that it encounters before the next funding source. This means that if an award number appears before eXtyles has encountered a funding source, it will cause a parsing error. The number must be placed after the funding source to achieve correct linking. eXtyles also supports having multiple award numbers marked for a single funding source.

FundRef

The eXtyles NLM/JATS export filter also supports FundRef IDs that are placed in funding or acknowledgment paragraphs of the Word file. FundRef is a CrossRef initiative that provides a standardized way to report funding sources for scholarly publications. By including standardized funding information in the publication XML, funders, researchers, and publishers can more easily discover how funds are being used.

While FundRef provides standardization for funding information, FundRef support in XML means you don't have to include the funder ID in the printed publication; the funder id is hidden under the name of the funding agency.

A combination of Word hyperlink and eXtyles character styles are used to properly set up FundRef IDs in the document. The funder name is converted into a Word hyperlink, where the funder name is the visible text of the link and the FundRef ID is the actual hyperlink. Then, the orange character style "Contract Sponsor" is applied to the hyperlink. In the following example, the text "National Institute of Mental Health" is a hyperlink to the FundRef id "<http://dx.doi.org/10.13039/100000025>" and is styled with the "Contract Sponsor" character style:

Acknowledgments: Research funded by National Institute of Mental Health ([MH078111](#), [MH078143](#), [MH059490](#)).

and the contract numbers are styled with the character style Contract Number.

According to version 1.0 of the JATS DTD, the following XML is generated in <article-meta>:

```
<funding-group><award-group>
<funding-source id="sp1">National Institute of Mental Health<named-content
content-type="funder-identifier">
http://dx.doi.org/10.13039/100000025</named-content></funding-source>
<award-id rid="sp1">MH078111</award-id>
<award-id rid="sp1">MH078143</award-id>
<award-id rid="sp1">MH059490</award-id>
</award-group>
</funding-group>
```

and the following XML for the Acknowledgments section:

```
<p>Acknowledgments: Research funded by <funding-source rid="sp1">National Institute of
Mental Health<named-content
content-type="funder-identifier">http://dx.doi.org/10.13039/100000025</named-content><
/funding-source> (<award-id rid="sp1">MH078111</award-id>, <award-id
rid="sp1">MH078143</award-id>, <award-id rid="sp1">MH059490</award-id>).</p>
```

In version 1.1 of JATS, the XML in <article-meta> is:

```
<funding-group><award-group>
<funding-source id="sp1">
<institution-wrap>
<institution>National Institute of Mental Health</institution>
<institution-id institution-id-type="DOI">
http://dx.doi.org/10.13039/100000025</institution-id>
</institution-wrap>
</funding-source>
<award-id rid="sp1">MH078111</award-id>
<award-id rid="sp1">MH078143</award-id>
<award-id rid="sp1">MH059490</award-id>
</award-group>
</funding-group>
```

and similarly the institution-wrap element is used in the funding-source in the acknowledgment.

If your organization is interested in adding FundRef ids to your XML, please contact us at eXtyles-support@inera.com.

Supplementary Material

Supplementary material can take many different forms and can be cited within a publication in many different ways. As such, there are many different ways to style and tag supplementary material with eXtyles.

If the entire supplement has a title, this should be styled as "Supplementary_Material_Head." The caption for each individual supplementary file should be styled using "Supplementary_Material_Caption." The caption for each supplementary file may be followed by file details to be pulled into the XML, such as mimetype or ID. The "Supplementary_Material_File_Information" paragraph style should be applied to a single paragraph containing one or more file details, each separated by a soft return. These file details are automatically pulled into the XML as attributes and values of the supplementary item.

If you have some text in the supplement that is not associated with a specific supplementary file, it should be styled as "Supplementary_Material."

In the following example, the Supplementary_Material_Head style is applied to the title of the supplement, while the Supplementary_Material_Caption is applied to the caption or description of the supplementary file. The Supplementary_Material_File_Information style is applied to the paragraph containing multiple details for that file, each detail separate by a soft return:

Supplementary_Material_Head	CPD for pharmacists
Supplementary_Material_Caption	This article has a Continuing Professional Development activity for pharmacists available.
Supplementary_Material_File_Information	file: testpdf.pdf mimetype: application/pdf mime-subtype: application/pdf content-type: application/pdf doi: 10.1234/5678 image: image.png

Note that the file information is formatted according to the following format:

attribute: attribute value

When the document is exported to XML, eXtyles uses this format to parse the specific file details and convert them into the correct attribute and value in the XML.

The above example yields the following XML:

```
<title>Supplementary Material</title>
<supplementary-material position="anchor" id="s1">
<caption><p>This article has a Continuing Professional Development activity for
pharmacists available.</p></caption>
<media xlink:href="testpdf.pdf" mimetype="application/pdf"
mime-subtype="application/pdf" content-type="application/pdf">
<object-id pub-id-type="doi">10.1234/5678</object-id></media>
<graphic xlink:href="image.png"/>
</supplementary-material>
```

Note that different attributes defined in the Word document are automatically tagged according to the type of information. The text "mime-type: application/pdf" is converted to an attribute in the media element, while the text "doi: 10.1234/5678" is tagged

as an <object-id>.

Note: The Supplementary_Material_Caption and _File_Information styles are designed to be used together. While either style can be used without the other, they each require the presence of the Supplementary_Material_Head style to enable the correct placement of uncited supplements in the XML.

Supplementary material is generally placed in a section element <sec sec-type="supplementary-materials"> at the end of the <body> section. However, supplementary material may also be placed in the <app> or <notes> element in the <back> section of the exported XML. Supplements may also be cited in the body of the document. In that case, supplements can be placed after the point at which the supplement is first cited in the XML instead of being anchored, just like a cited table or figure.

Note: Supplements may be both cited in the document and placed in the <back> section of the exported XML. Please contact exstyles-support@inera.com if you would like supplementary material to always be placed in the <back> content of your XML.

In the following example, a supplementary video has been cited in the body of the article, and the file information has been included:

HeadingB	▪ Acute Phase
Paragraph	Based on the evaluation findings (Video 31.1), the physical therapist can develop goals and a plan of care specific to each patient's needs and limitations.
Supplementary_Material_Caption	Video 31.1. Ferkel RD: Subtalar Arthroscopy, in Tasto JP: Video: Surgical Techniques in Orthopaedics: Principles in Arthroscopy. Rosemont, IL, American Academy of Orthopaedic Surgeons, 2003.
Supplementary_Material_File_Information	file:AOE-01-031-13-vid01.mp4 mimetype: video mime-subtype: mp4

This results in the following XML:

```

<title>Acute Phase</title>
<p>Based on the evaluation findings (<xref ref-type="supplementary-material"
rid="J123-vid31.01">Video 31.1</xref>), the physical therapist can develop goals and a
plan of care specific to each patient's needs and limitations.<xref
ref-type="bibr" rid="J123-r3"><sup>3</sup></xref><sup>, </sup><xref ref-type="bibr"
rid="J123-r4"><sup>4</sup></xref></p>
<media id="J123-vid31.01"
xlink:href="http://orthoportal.aaos.org/ebooks/video.aspx?id=EMEDIA-ABC-123-123-2014-v
id01" xlink:role="media-player-id" content-type="play-in-place" mimetype="video"
mime-subtype="mp4"><label>Video 31.1</label><caption><p>Ferkel RD: Subtalar
Arthroscopy, in Tasto JP: Video: Surgical Techniques in Orthopaedics: Principles in
Arthroscopy. Rosemont, IL, American Academy of Orthopaedic Surgeons,
2003.</p></caption>
<object-id pub-id-type="other"
content-type="media-stream-id">AOE-01-031-13-vid01.mp4</object-id>
</media>

```

The destination URL in this example (xlink:href="http://orthoportal.aaos.org/ebooks/video.aspx?id=EMEDIA-ABC-123-123-2014-vid01") is not included in the Word document. File information may be defined in your export filter as default information that is always included in the supplementary material XML. Please contact eXtyles-support@inera.com if you would like to define default values for supplementary files.

Insert Tags

The items on the eXtyles Insert Tag menu allow greater control over the XML output. Note that not all of these tags will necessarily be available in your eXtyles configuration. Inera typically adds specifically required tags as needed. Contact eXtyles-support@inera.com if you believe that you would benefit from the addition of any of these tags to your configuration.

Any time instructions below call for an eXtyles Tag (tag names highlighted in bold) to be added to a figure, table, or text box, you must add the eXtyles Tag to the end of the object title. Adding it at the beginning of the object title will interfere with eXtyles processes to automatically assign IDs to objects during export.

To use this feature, follow these steps:

1. Remove any existing tags around the content that you want to tag
2. Select the paragraph or text string that should be tagged; if the tags should appear at the end of the paragraph (e.g., [Figure Tags](#)), put your cursor at the end of the paragraph
3. Click the Insert Tag menu from the eXtyles ribbon
4. Select the appropriate tag from the menu

Figure Tags

Special Figure Filenames

In some cases, you may want to use an explicit filename for figures instead of using the auto-assigned eXtyle name. This may be especially true for unnumbered figures. For example, if you have a book about animals, you might want to name each image for the name of the animal. This can be done by using the Insert Tag item on the eXtyle Menu to insert an Inline Graphic tag (Named Graphic in some configurations).

When doing this to override the automatic figure filename assignment in a figure caption, this tag must be placed at the end of the figure caption. If the figure has a multi-paragraph caption, this tag should be inserted at the end of the last paragraph. If the figure has an attribution, source, or copyright line, the tag should be inserted after any of these paragraphs.

Doing so inserts a tag like this:

Fig. 1. Effect of DGC or PDE overexpression in *B. bronchiseptica* biofilm formation.<graphic></graphic>

And then you should type in the name of the figure file in between the tags like this:

Fig. 1. Effect of DGC or PDE overexpression in *B. bronchiseptica* biofilm formation.<graphic>Biofilm-image</graphic>

When the XML is created, the name inside the tags is used as the pointer to the graphic file, as in:

```
<graphic xlink:href="Biofilm-image"/>
```

Figure Placement

Sometimes it's necessary to insert a figure that has no caption at an arbitrary location (e.g. a custom logo at the end of each article). This can be done by using the Insert Tag item on the eXtyle Menu to insert an Inline Graphic/Named Graphic tag at any point in the text. Doing so inserts a tag like this:

...end of article text.<graphic></graphic>

And then you should type in the name of the figure file in between the tags like this:

...end of article text.<graphic>CustomLogo</graphic>

When the XML is created, the name inside the tags is used as the pointer to the graphic file, e.g.:

...end of article text.<inline-graphic xlink:href="CustomLogo"/>

As with other figures, no file extension is used because the file extension will be added during the rendering process. However if you add an explicit extension inside the <graphic> tag, it will be carried through into the XML.

In addition to "inline," the orientation of a graphic may be defined as Anchor, Float, or Landscape by using additional graphic tags at the end of a figure caption. For example, a graphic that should be formatted as a landscape image during final production should use the Landscape tag, and not the Graphic tag:

Fig. 3. Illustration of a large map<landscape></landscape>

This yields the following XML:

```
<fig id="f3" position="float" fig-type="figure"
orientation="landscape"><label>Fig.
3</label><caption><p>Illustration of a large
map</p></caption><graphic
xlink:href="123-f3"></graphic></fig>
```

Figures Made Up of Multiple Image Files

Sometimes a figure may have multiple image files (panels), particularly when it is in multiple parts. For example, an author might have created figures 1A, 1B, 1C, and 1D, each as a separate file. In this situation, you will need four <graphic> elements in the XML.

This can be done by using the Insert Tag item on the eXtyle Menu to insert a Figure Panels tag at the end of the figure caption, which inserts a tag like this:

```
<panel></panel>
```

If each panel is a separate image file, type in the letter of the last panel, like this:

```
Figure 1: This is a figure<panel>d</panel>
```

The resulting XML will look like this:

```
<fig id="F001" position="float" fig-type="figure">
<label>Figure 1</label>
<caption><p>This is a figure made up of four image files.</p></caption>
<graphic xlink:href="BK06557_C001_F001a"></graphic>
<graphic xlink:href="BK06557_C001_F001b"></graphic>
<graphic xlink:href="BK06557_C001_F001c"></graphic>
<graphic xlink:href="BK06557_C001_F001d"></graphic>
</fig>
```

The Figure Panels tag can even be used in cases where the parts of the figure are not evenly distributed, one per image file. For example:

```
Figure 2: This is a figure title<panel>ad,ef,gk</panel>
```

yields this XML:

```
<fig id="f2" position="float" fig-type="fig">
<label>Figure 2</label>
<caption><title>This is a figure title</title></caption>
<graphic xlink:href="56789-f04-f2ad"/>
<graphic xlink:href="56789-f04-f2ef"/>
<graphic xlink:href="56789-f04-f2gk"/>
</fig>
```

This would correspond to three image files, one containing parts (a)–(d), a second containing parts (e) and (f), and a third with parts (g)–(k), with each file named appropriately.

Video Files

Video files can be treated in the same way as static figures when exporting XML to the JATS or NLM Book DTDs. If your figure caption style is applied to a caption for the video, and the video is cited as e.g. "Video 1" or "Movie 1" in the text and the caption, then eXtyle will export the appropriate XML (Citation Matching will also match citations of videos in the same way that it matches citations of figures, tables, etc.).

One thing to bear in mind is that the export will create both a <media> element (for the video file itself) and a <graphic> element in the XML. This <graphic> element should point to a static file that can then be used as a placeholder for the video file in a print publication or as the preview frame online.

The following XML will be created:

```
<fig id="vid1" position="float" fig-type="video">
  <label>Video 1</label>
  <caption><p>This is the caption for the video.</p></caption>
  <graphic xlink:href="CDT-2012-35-vid1"></graphic>
  <media xlink:href="CDT-2012-35-vid1" />
</fig>
```

The XML would need to be accompanied by files named CDT-2012-35-vid1.tif (or perhaps .gif or .jpg) for the placeholder and, for example, CDT-2012-35-vid1.avi for the video itself.

List Continued Tag

It is sometimes necessary to interrupt a list with, say, a subheading. Under normal circumstances, this would cause the next item in the list to be placed in a new list in the XML file. Because it is not permitted by JATS or the NLM Book DTD to start a new XML section within a list, it isn't possible to set up a Word paragraph style for a heading in a list. Instead, the List Continued tag should be placed at the end of the first list item after the heading, which has the effect of connecting the two lists by a continued-from attribute in the XML. An example of the use of this tag in Word follows:

Section 1. Bibliography

1. Poetry collections
2. Books, prose
3. Drama

Section 2. External links

4. Profiles<list-cont></list-cont>
5. Archive and works

which yields the following XML:

```
<sec id="ss-s09-01-01">
  <title>Section 1. Bibliography</title>
  <list id="ss-L18" list-type="order">
    <list-item><label>1</label><p>Poetry collections</p></list-item>
    <list-item><label>2</label><p>Books, prose</p></list-item></list>
    <list-item><label>3</label><p>Drama</p></list-item></list>
  </sec>
  <sec id="ss-s09-01-02">
    <title>Section 2. External links</title>
    <list id="ss-L19" list-type="order" continued-from="ss-L18">
      <list-item><label>4</label><p>Profiles</p></list-item>
      <list-item><label>5</label><p>Archive and works</p></list-item></list>
    </sec>
```

MIME Type Tags

As mentioned earlier, the file type extension for image files is not included in the XML. However, there may be occasions when it is necessary to specify the type of image file that is associated with a given <graphic> element. The Mime Type tag can be used in this case. The following text in the Word file:

Figure 1: This is a figure title<mime>TIFF</mime>

results in the following XML:

```
<fig id="f1" position="float" fig-type="fig">
  <label>Figure 1</label>
  <caption><title>This is a figure title</title></caption>
  <graphic xlink:href="56789-f04-f1" mimetype="TIFF"/>
</fig>
```

Object Type Tags

In many cases, it can be useful to have multiple types of "objects" when driving formatting from XML. For example, a chapter might have "Box" and "Essay" sidebars, each with unique formatting. eXtyles supports this well by automatically setting the content-type attribute when an "Essay" label is found in text, e.g.

Essay 1: This is an essay

becomes the following in XML:

```
<boxed-text id="ES001" content-type="essay">
  <label>Essay 1: </label>
  <caption><title>This is an essay</title></caption>
```

However, in some cases, you may have boxes for which you would like a unique content-type attribute. This can be set easily in eXtyles using the Box Type tag found on the eXtyles Insert Tag menu. By adding this tag at the end of a box title, and placing the box type in between the tags, eXtyles will convert that information into the content-type attribute on export. For example, this content in the Word file:

Pearls and Pitfalls<Box_Type>Pearl</Box_Type> [Box Title]

- Head CT is critical to diagnosis, management, and prognosis following TBI [Box Text]

would yield this XML:

```
<boxed-text id="c002_bb" content-type="Pearl" location="intext" position="anchor">
  <title>Pearls and Pitfalls</title>
  <list id="c002_1014"
  list-type="bullet"><list-item><label>•</label><p>Head
  CT is critical to diagnosis, management, and prognosis following
  TBI</p></list-item>
</boxed-text>
```

This same technique can be used to set types for

- Figures (Figure Type)
- Tables (Table Type)
- Section Heads (Section Type)
- Lists (List Type)
- Extract quotes (Extract Type)

by using the appropriate tags on the Insert Tag menu, as indicated. This feature gives tremendous flexibility to format books without requiring a large number of new paragraph styles.

Reference Tags

The first section of the Insert Tag menu consists of tags for various reference types (Book Reference, Conference Reference, etc.) to allow the type of reference to be tagged manually if the eXtyles Bibliographic Reference Processing fails to identify the reference type correctly, even when the reference is correctly copy-edited. To use these tags, follow these steps:

1. Remove the incorrect tags from the start and end of the problematic reference. The safest way to do this is to place the cursor immediately after the tag and use the Backspace key twice to first highlight and then delete the tag.
2. Highlight the entire paragraph with the reference.
3. Select the appropriate reference type from the Insert Tag menu.

After applying the tag manually, you may add additional markup to the reference with Word character styles as necessary.

Specific Use Tags

JATS and versions 3.0 of the NLM Journal Publishing and Book DTDs contain an attribute "specific-use"; this attribute is not available in version 2.3 or earlier of the DTDs. This attribute is found in most elements and can be used very effectively in place of processing instructions to set up information in the XML specific to your environment. While not widely needed in journals, this attribute is very useful in books. For example, if you have a paragraph that needs to be centered in the PDF, you could set up the following:

```
Paragraph<su>centered</su>
```

by selecting Specific Use from the eXtyle Insert Tag menu and then typing into the tags the text you want in the attribute. This results in the following XML

```
<p specific-use="centered">Paragraph</p>
```

This tag can be applied to figures, tables, boxes, extract quotes, lists, and paragraphs.

As another example, the markup:

1. Which refers to communicating between people about general information?
 - a. intrapersonal<su>2col</su>
 - b. impersonal
 - c. interpersonal
 - d. public
2. Which speaking context refers to the values and beliefs of your audience?

specifies that the nested list items a through d should appear in a 2-column layout (note that this could also be accomplished with a two-column inline table, but then the 2-column layout would be required in both print and electronic formats, which using specific-use lets each rendering system display with a different layout).

This would give the following XML:

```
<list list-type="order" id="L1">  
  <list-item><p>Which refers to communicating between people about general  
information?</p>  
  <list specific-use="2col" list-type="alpha-lower" id="L2">  
    <list-item><p>intrapersonal</p></list-item>  
    <list-item><p>impersonal</p></list-item>  
    <list-item><p>interpersonal</p></list-item>  
    <list-item><p>public</p></list-item>  
  </list>  
</list-item>  
<list-item><p>Which speaking context refers to the values and beliefs of your  
audience?</p></list-item>  
</list>
```

To apply specific use to a list item (rather than the entire list), it is necessary to use the List Item Specific Use tag at the end of the list item in question.

Another example of the specific-use attribute is to indicate a photo that should have a clipping path applied for rendering, as in:

In what ways can you be ethical in researching speech topics?<su>clip-path</su>

If this tag were used at the end of a photo caption, it would yield the following XML:

```
<fig id="fa" position="float" fig-type="photo" specific-use="clip-path">
  <caption><p>In what ways can you be ethical in researching speech
topics?</p></caption>
  <graphic xlink:href="0-123456-78-9c003-fa"></graphic>
</fig>
```

Typéfi Tags

For eXtyle customers who use Typéfi to create PDF files in InDesign from their JATS- or NLM Book DTD-compliant XML, there are a number of tags on the Insert Tag menu that give great control over display items in composition. The precise effect of each of these tags will have been arranged with Typéfi to suit the needs of your layout. Note that these effects could also be achieved by using the content-type attribute, as outlined for the various Object Type tags. These tags must appear at the end of the caption of the item to which they apply.

Size Tags

Tags are available to set display items to be small, medium, or large (e.g. Tbl_Small, Fig_Med, and Box_Large). These tags should be placed at the end of the table title, figure caption, or box caption. They result in processing instructions (e.g. <?Table Small?>, <?Figure Med?>, and <?Box Large?>) being added to the XML that will direct Typéfi to set the tables, figures, or boxes a particular size.

For example, this text in the Word file:

Figure 3 The Future Value of a Five-Year Ordinary Annuity<Fig_Large></Fig_Large>

will yield this XML:

```
<fig id="DOC0123-R-F3" position="float"
fig-type="figure"><?Figure Large?><label>Figure 3
</label><caption><title>The Future Value of a
Five-Year Ordinary Annuity</title></caption><graphic
xlink:href="DOC0123-R-F3"></graphic></fig>
```

Turn Tags

Tags are also available to force display items (tables, figures, and boxes; e.g. Tbl_Turn1, Fig_Turn2, Box_Turn3) to be displayed in a landscape orientation.

Span Tags

The span tags (Tbl_Small_Span, etc.) map to full-table or individual cell styles in InDesign, such as cell shading.

XML Tag

There may be times when you need to insert some XML exactly as it appears in the Word document, perhaps to include some XML that isn't supported by your current export filter. This can be achieved by adding the XML tag and placing the raw XML code between the start and end tags. For example:

Abstract: this is the `<xml><monospace>courier</monospace><named-content content-type="test">species</named-content></xml>` document in English.

yields this XML:

```
<abstract>
  <sec><title>Abstract</title><p>this is the
  <monospace>courier</monospace>
  <named-content content-type="test">species</named-content>
  document in English.</p></sec>
</abstract>
```

Note that this raw XML will still need to be valid against the appropriate DTD, and will cause a parsing error if not.

Baseline Copies

eXtyle creates a single baseline backup copy of your original document on activation. Sometimes it may be useful to have more than one baseline version of a document. For example, if a significant number of Cleanup changes are made prior to Auto-Redact, it may be useful to make a second baseline just prior to Auto-Redact. This second baseline will make it easier to view only those changes made by the Auto-Redact function without having to review those changes that resulted from the document Cleanup. By saving multiple baselines in this fashion, you can compare to either the original document or the document as it existed immediately prior to Auto-Redact.

Create New Baseline

Create New Baseline acts as follows:

1. It checks for the existence of documents called Document\$base.doc and Document\$original.doc.
2. If neither document exists, it will save the new baseline as Document\$base.doc. If only Document\$base.doc exists, it renames this document to be Document\$original.doc and saves the new baseline as Document\$base.doc.
3. If both Document\$base.doc and Document\$original.doc exist, it renames Document\$base.doc to Document\$base1.doc and then saves as new baseline as Document\$base.doc. Subsequent saves will rename Document\$base.doc as Document\$base2.doc, etc.

If you have two or more baseline versions saved, a dialog will open when you select the Compare to Baseline menu item. This dialog will list all baseline versions that you have saved with the most recent one highlighted at the top of the list. You can select the most recent baseline or any other one to perform a comparison between your document in its current state and the selected baseline.

Compare to Baseline

To compare the current version of the document being processed by eXtyles with one of the baseline copies:

1. Select eXtyles > Compare to Baseline

A dialog appears and lists all the baseline versions that have been saved. The date and time appears in parentheses next to each document, for example, Document\$base.doc (2/15/12 1:43 PM). The most recent version is highlighted at the top of the list. You can select any of the baseline versions to perform the comparison with your current document.

2. Select the desired document and click Compare

Warning: Do not make changes in the Baseline Compare document: make all changes in the original file. eXtyles functions are disabled on all baseline compare documents as a safety measure.

Word-level Comparison versus Character-level Comparison

If there are multiple baseline files available, you will have the option to show changes at the word level or the character level. If you choose the word level, a word in which there is a single-character change will appear to have been replaced completely (i.e., if the word “armour” is changed to “armor”, it will appear as if the entire word “armour” has been replaced with “armor” rather than just one letter); if you choose the character level, just the letter “u” will be tracked as a deletion rather than the entire word appearing to have been replaced.

If there is only one baseline file available when you select Compare to Baseline, eXtyles defaults to showing changes at the Word level.

There is no difference in the end result in the Word document! The two options affect only how Word displays changes in comparisons in the Compare to Baseline feature. Either option is a safe choice.

Formatting Changes

In addition to viewing the changes in your Word document at the word level or character level, you can also view all formatting changes made to your document. Formatting changes include modifications to font, paragraph spacing, face markup like bold or italic, and more. To highlight formatting changes in your comparison file, check the box for “Show formatting changes” before clicking Compare on the Compare to Baseline dialog.

Source Document Display Options

You can also change the display of source documents (the documents that are to be compared, such as a working document and a baseline document) in Word by viewing the Review ribbon in Word and clicking Compare toward the right of the ribbon;

from the Compare drop-down menu, you can choose Show Source Documents and one of the following settings: Hide Source Documents, Show Original, Show Revised, or Show Both. The default setting in eXtyle Compare to Baseline is Hide Source Documents, which means that by default, you see only the comparison result between the original document and the baseline.

Baseline Compare Issues

In a few instances, the Compare to Baseline compare function signals spurious differences between the initial and cleaned-up texts, as described in the following subsections.

Special Characters

Certain special characters (symbols such as degree, times, similar, less and greater than, plus or minus, etc.) are highlighted as having been changed. The words containing these characters are crossed out in the baseline comparison file and rewritten. There may be no actual difference between the initial and the cleaned font and font size.

Greek Letters

Greek letters (and other characters) are highlighted as having been changed if eXtyles uses the Symbol font to represent them. The words containing these characters are crossed out and rewritten.

Fields

If some text in the initial document is represented in a field, eXtyles converts the field to text. When you review the original text, it appears shaded to indicate that it was a field.

Automatic Numbering

In automatically numbered sections of text, the following differences may appear in the cleaned version:

- Numbering may be reformatted
- Numbers may be re-represented
- Indentation and tab lengths may be altered

Footnotes

Compare to Baseline highlights differences where footnote citations were located because the footnote citation has been re-represented. In baseline compare, both sets of numbers will appear in dotted boxes. For now, it is necessary to copy the footnote text from original document to working copy by hand.

Private Fields

eXtyles removes private fields and leaves the notation [REMOVED PRIVATE FIELD] in their place.

Advance Fields

eXtyle removes advance fields and leaves the notation [REMOVED ADVANCE FIELD] in their place.

Added Returns

eXtyle may insert a return before page breaks or after removed table notation, or at the end of a document.

eXtyles and Footnotes/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.

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.

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:

- **Convert linked notes to plain-text:** Depending on your configuration, hyperlinked notes may be converted to plain text during Activation, or at any time during Cleanup or Post-Processing Cleanup. Plain-text notes may then be styled and automatically processed by eXtyles.
- **Convert to Linked Notes for Downstream Processing: Having converted the linked notes to plain text, or starting with original plain text notes, 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.**
- **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 to 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. Please note that this feature is new and may require additional modifications to your eXtyles configuration.

Note that XML Export has been modified so that linked notes could be exported successfully to XML.

Converting Plain Text Notes to Linked Notes

To convert plain text notes to linked notes, click Post-Processing Cleanup from the eXtyles menu to open the Post-Processing Cleanup dialog. Then, select Convert plain-text Footnotes and Endnotes to Word Footnotes and Endnotes, and click OK. If you only want to run this one function, be sure to Clear All settings before selecting this option.

Requirements

There are some requirements 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.

Warning: If you are converting plain text notes to linked notes, this function must be run before Author Processing to prevent the incorrect handling of author footnotes.

Whole-document versus Section-by-Section Conversion of Notes

The eXtyles functions to convert linked notes to plain text and to convert them back to linked notes can be set up to process notes either on a whole-document basis 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 if you would like to add support for section-by-section numbering of notes.

Working with Linked Word Notes in eXtyles

If you elect to keep notes linked on activation, it is now possible for eXtyles processes such as Auto-Redact and Citation Matching can be run on linked Word notes while retaining their Word properties. During an eXtyles process, notes are converted to plain text as part of and then automatically convert them back to linked notes again after eXtyles has made changes to the note text.

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.

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).

eXtyles and Tracked Changes

Historically, eXtyles and Word's Tracked Changes feature have been incompatible. During all eXtyles processes, eXtyles automatically accepts all tracked changes and disables the Tracked Changes tool. Unfortunately, adding the ability to preserve Tracked Changes—let alone track new changes made during eXtyles processing—poses many complex technical challenges.

Currently, one possible workflow solution is Word's Compare/Combine tool, available on the Review ribbon. This tool lets you combine an earlier version of a document with a revised version of the document and mark all differences between the two as Tracked Changes. You can merge the changes into the revised document, retroactively converting all revisions to Tracked Changes; you can also save the combined document as a new document.

In an eXtyles workflow, this tool can be used to convert changes made by eXtyles to Tracked Changes. Any Tracked Changes or comments that were made before Document Activation, which are retained in the \$original version of the document, can also be preserved and merged with eXtyles changes.

The tracking of Formatting changes can be disabled, avoiding the addition of many “noisy” changes caused by Paragraph Styling. You can also select how far back in the eXtyles process you want to track changes by selecting a particular \$base file. If you want to track all changes, then you can select the \$original file as the “original” file.

This process can be completed at any time. If the changes are combined into the working document, then eXtyles Activation is preserved. You can then enable Tracked Changes (which is not enabled) and send the document to other editors or authors for review or further editing. When the document is returned, and the document is still activated, you can safely accept or reject the changes and continue eXtyles processing.

To convert all eXtyles changes to Tracked Changes:

1. When you are ready to convert eXtyles changes to Tracked Changes, save your working document.
2. On the Review tab, select Compare, and then click Combine.
3. Browse to select the \$original version of your working document for your “Original document.”
4. Browse to select your working document for your “Revised document.”
5. Click More.
6. Select which changes you want tracked. It is recommended that you disable “Formatting” changes.
7. Select the level of granularity at which you want changes shown (word or character).
8. Select which document in which you want to show the tracked changes. To update your working document with the tracked changes, select “Revised document;” Activation will be preserved.
9. Click OK to show combined changes.

Because of the extent and complexity of the changes that eXtyles makes to references, Word is unable to track the changes with any degree of granularity. Instead, the original reference is tracked as “deleted” and the revised reference is tracked as “inserted.”

eXtyles Shortcut Keys

Different eXtyles processes include shortcut keys (or hot keys) that help you take advantage of extra functionality and maximize your efficiency. These shortcuts are listed below:

Activation

Shortcut	Function
Hold Shift while clicking OK	Removes unused paragraph styles during Activation

Styling

Shortcut	Function
X	Next; go to the next paragraph without changing the style of the selected paragraph
Shift+X (or Shift+Next)	Skip all paragraphs styled with the current paragraph's style and go to the next paragraph styled with a different style.
V	Previous; go to previous paragraph
U	Undo; undo the last operation (Note: The eXtyles Undo history is separate from the Word Undo history, and clicking into the Word document will erase the eXtyles Undo history)
W	With prev; merge the current paragraph with the previous paragraph
G	New pgraf; insert a return after the first sentence of the paragraph, creating two paragraphs from one
D	Delete; delete the current paragraph
Esc	Close the Styling Palette

Table Styling

Shortcut	Function
(none)	By default, applies the specified style to an entire row (from the current cell to the end of the row)
Shift+[style]	Applies the specified style to the remainder of the table
Control+[style]	Applies the specified style to one paragraph within a cell at a time
Shift+Control+[style]	Applies the specified style to one cell at a time

Special Characters in Word

You can insert special characters into a Word document either directly from your keyboard, by using the Insert menu, or by using the eXtles Symbols menu. All methods are described in this section.

Inserting Special Characters from the Keyboard

The tables in this section list the shortcut keys you can use to insert special characters in a Word text.

The shortcut keys and ISO codes are summarized in two tables: one for commonly used special characters and another for accented letters.

When a comma separates two parts of a command short cut, you must follow two distinct steps to insert the character. First press and then release the keys leading up to the comma, then press the keys following the comma. For example, to type in an e with an acute accent (é):

1. Hold down the Control key and press the single quote (acute accent) key (').
2. Release both keys.
3. Press the e key.

The following table lists keyboard shortcuts and ISO codes for commonly used special characters, including em and en dashes. "Num" keys refer to keys on the numeric keypad. For example, "Num-" is the minus sign on the numeric keypad.

Inserting Commonly Used Special Characters

Ch	Name	Shortcut Keys	ISO Code
—	Em dash	Alt+Ctrl+Num-	—
-	En dash	Ctrl+Num-	–
-	Nonbreaking hyphen	Ctrl+_	
⎵	Optional hyphen	Ctrl+-	­
	Nonbreaking space	Ctrl+Shift+Space	
©	Copyright	Alt+Ctrl+c	©
®	Registered	Alt+Ctrl+r	®
™	Trademark	Alt+Ctrl+t	™
...	Ellipsis	Alt+Ctrl+.	…
'	Single opening quote	Ctrl+`,`	‘
'	Single closing quote	Ctrl+`,`	’
"	Double opening quote	Ctrl+`,`	“
"	Double closing quote	Ctrl+`,`	”

The following table lists keyboard shortcuts and ISO codes for inserting accented letters and other special characters. "Num" keys refer to keys on the numeric key pad. For example, "Num-" is the minus sign on the numeric keypad.

Inserting Accented Letters and Other Special Characters

Ch	Name	Shortcut Keys	ISO Code
¡	Inverted exclamation mark	Alt+Ctrl+!	¡
¢	Cent sign	Ctrl+/, c	¢
¨	Umlaut mark	Ctrl+;, Space	¨
«	Left angle quotation mark	Ctrl+`, <	«
°	Degree	Ctrl+@, Space	°
´	Acute accent	Ctrl+ ", Space	´
¸	Cedilla	Ctrl+,, Space	¸
»	Right angle quotation mark	Ctrl+`, >	»
¿	Inverted question mark	Alt+Ctrl+?	¿
À	Capital A, grave	Ctrl+`, A	À
à	Small a, grave	Ctrl+`, a	à
Á	Capital A, acute	Ctrl+ ", A	Á
á	Small a, acute	Ctrl+ ", a	á
Â	Capital A, circumflex	Ctrl+^, A	Â
â	Small a, circumflex	Ctrl+^, a	â
Ã	Capital A, tilde	Ctrl+~, A	Ã
ã	Small a, tilde	Ctrl+~, a	ã
Ä	Capital A, umlaut	Ctrl+;, A	Ä
ä	Small a, umlaut	Ctrl+;, a	ä
Å	Capital A, ring	Ctrl+@, A	Å
å	Small a, ring	Ctrl+@, a	å
Æ	Capital AE diphthong (ligature)	Ctrl+&, A	Æ
æ	Small ae diphthong (ligature)	Ctrl+&, a	æ
Ç	Capital C, cedilla	Ctrl+,, C	Ç
ç	Small c, cedilla	Ctrl+,, c	ç
È	Capital E, grave	Ctrl+`, E	È
è	Small e, grave	Ctrl+`, e	è
É	Capital E, acute	Ctrl+ ", E	É

é	Small e, acute	Ctrl+", e	é
Ê	Capital E, circumflex	Ctrl+^, E	Ê
ê	Small e, circumflex	Ctrl+^, e	ê
Ě	Capital E, umlaut	Ctrl+;, E	Ë
ě	Small e, umlaut	Ctrl+;, e	ë
Ì	Capital I, grave	Ctrl+`, I	&lgrave;
ì	Small i, grave	Ctrl+`, i	ì
Í	Capital I, acute	Ctrl+", I	í
í	Small i, acute	Ctrl+", i	í
Î	Capital I, circumflex	Ctrl+^, I	Î
î	Small i, circumflex	Ctrl+^, i	î
Ï	Capital I, umlaut	Ctrl+;, I	Ï
ï	Small i, umlaut	Ctrl+;, i	ï
Ð	Capital Eth, Icelandic	Ctrl+", D	Ð
ð	Small eth, Icelandic	Ctrl+", d	ð
Ñ	Capital N, tilde	Ctrl+~, N	Ñ
ñ	Small n, tilde	Ctrl+~, n	ñ
Ò	Capital O, grave	Ctrl+`, O	Ò
ò	Small o, grave	Ctrl+`, o	ò
Ó	Capital O, acute	Ctrl+", O	Ó
ó	Small o, acute	Ctrl+", o	ó
Ô	Capital O, circumflex	Ctrl+^, O	Ô
ô	Small o, circumflex	Ctrl+^, o	ô
Õ	Capital O, tilde	Ctrl+~, O	Õ
õ	Small o, tilde	Ctrl+~, o	õ
Ö	Capital O, umlaut	Ctrl+;, O	Ö
ö	Small o, umlaut	Ctrl+;, o	ö
Ø	Capital O, slash	Ctrl+/, O	Ø
ø	Small o, slash	Ctrl+/, o	ø
Ù	Capital U, grave	Ctrl+`, U	Ù
ù	Small u, grave	Ctrl+`, u	ù
Ú	Capital U, acute	Ctrl+", U	Ú

ú	Small u, acute	Ctrl+", u	ú
Ů	Capital U, circumflex	Ctrl+^, U	Û
ů	Small u, circumflex	Ctrl+^, u	û
Ü	Capital U, umlaut	Ctrl+;, U	Ü
ü	Small u, umlaut	Ctrl+;, u	ü
Ý	Capital Y, acute	Ctrl+", Y	Ý
ý	Small y, acute	Ctrl+", y	ý
ß	German sz ligature	Ctrl+&, s	ß
ÿ	Capital Y, umlaut	Ctrl+;, Y	Ÿ
ÿ	Small y, umlaut	Ctrl+;, y	ÿ
Œ	Capital OE diphthong, ligature	Ctrl+&, O	&Oelig;
œ	Small oe diphthong, ligature	Ctrl+&, o	œ
Š	Capital S, caron	Alt+Ctrl+^, S	Š
š	Small s, caron	Alt+Ctrl+^, s	š
^ ^	Circumflex accent; small circumflex	Altnum094 or ^; Ctrl+^, Space	

Inserting Special Characters Using the Insert Function

To insert special characters not listed in either of the previous tables:

1. Place the cursor at the location where you want to insert the character.
2. Select Symbol from the Insert menu.
The Symbols tab displays a scrollable palette of accented letters, including Greek letters. The Special Characters tab contains characters such as en dash and em dash.
3. Select the desired symbol or special character from one of the tabs.
If the appropriate symbol does not appear on the Symbols tab, you can search for it under different fonts.
4. Click the Font drop-down list and select a different font.

For some fonts, a Subset drop-down list appears, which lets you select a smaller character set within the font you have selected. The first character in the subset is highlighted in blue. The subsets correspond to Unicode subdivisions. For example, if you want to insert a spacing modifier letter into your text, select the Spacing Modifier Letters subset to find the first of these characters on the palette. Click on the character in blue to highlight it, then use the arrow keys to continue scrolling through the subset until you find the character you are looking for.

If a character with shortcut keys is highlighted on this tab, the shortcut keys appear in the lower right area of the form when the character is highlighted.

To insert a character from the Special Characters tab, highlight the appropriate special character and click Insert.

Inserting Special Characters from the eXtyles Symbols Menu

Insert special characters by selecting the primary menu item and then the appropriate secondary menu item.

This menu can easily be customized to allow easy insertion of additional special characters. For more information about customization of this menu, please contact exstyles-support@inera.com.

Inserting Other Special Characters

Certain special characters cannot be inserted from the dialog. Use the methods described here to insert them:

−

1. Type a hyphen character at the keyboard.
2. Select the character.
3. From the Format menu, select Font and change the typeface to Symbol.

∼

1. Type "223C". This is Unicode for the character
2. Select the Unicode, and press Alt-X to toggle special character display.

If you start typing immediately after a special character, the text is likely to appear in the font of the special character (for example, Symbol font). If you must enter new text after a special character, reselect the default paragraph font after you insert the cursor and before you begin typing

Creating Key Commands for Special Characters

You can create a custom key command to quickly insert frequently used special characters. The following procedure describes the steps used to assign the key command "Control-Shift-X" to insert the symbol .

1. Select Symbol from the Insert menu.
2. Highlight the symbol.
3. Click the Shortcut Key button.
4. When the Customize Keyboard dialog appears, place the cursor in the Press new shortcut key text box and press Ctrl-Shift-X on the keyboard.
5. Click the Assign button, then click Close twice.

Special Characters and Nonstandard Fonts

eXtyles accurately retains special characters if the characters are correctly retained by Microsoft Word when it opens a document. In general, Word accurately retains this information for documents that were authored either in Word for Windows or Macintosh Word. Word may not always display them correctly, but it generally retains the underlying information to allow the generation of a correct XML file.

You are most likely to encounter special character problems when using nonstandard fonts. eXtyles defines a standard font as one that:

1. Uses the same character set as Times New Roman, but is just a different typeface (for example, Arial, Courier, and so on)
2. Is a set of special characters for which special knowledge has been built into eXtyles (for example, Symbol, Monotype Sorts, MT Extra, and so on)

Inserting a Special Character in a font

Use the following procedure to enter a special character (for example, the plus/minus symbol: \pm) in either the Find or the Replace dialog:

1. Insert the symbol somewhere within the document by selecting eXtyles > Insert and clicking the appropriate symbol.
2. Cut the character and paste it into the Find or Replace dialog.
3. Use the following procedure if the replace string contains more than one character style (for example, if you are changing "CD8+" to "CD8+"):
 4. Type in the replacement text somewhere within the document and format it as needed using the Font function of the Format menu.
 5. Cut the text to the clipboard.
 6. Open the Replace dialog. Click the More button.
 7. Place the cursor in the Replace with text box of the Replace dialog, click the Special button, and select Clipboard Contents.

If you want to find the Unicode value or HTML entity of a particular character, we recommend usingunicodelookup.com.

eXtyles ORCID Integration Suite

ORCID is “an open, non-profit, community-based effort to provide a registry of unique researcher identifiers and a transparent method of linking research activities and outputs to these identifiers” (<http://about.orcid.org/>). Many partners in the scholarly research endeavor have been quick to show support for the initiative, including individual researchers, research organizations, research funders, professional and learned societies, publishers, and abstracting and indexing organizations.

ORCIDs are typically collected from authors in online submission systems and made available to publishers or their suppliers in XML transmittal files. However, publishers rely on the author list in the submitted manuscript (usually a Word file) as the authoritative author list. At some point in the workflow, the authors’ names and ORCIDs must be synchronized between the transmittal and the Word manuscript so they can be accurately included in the final XML file. However, this synchronization is a tedious and error-prone task when completed by hand, and when done manually, the process nullifies the ORCID authentication.

The eXtyles ORCID Integration Suite automatically and accurately synchronizes and merges author names and ORCIDs from transmittal and Word files into the final XML as part of the eXtyles workflow. Our seamless integration provides a robust system for using ORCIDs in your publishing workflow. With this suite of modules, you can:

- Import ORCIDs from your XML transmittal using the Document Information Metadata Browse function
- Automatically synchronize and validate ORCIDs and author names in the manuscript and the transmittal during Author Processing
- (Optional) Merge ORCIDs from the transmittal into the author paragraph during Author Processing
- Export ORCIDs into NLM/JATS XML during eXtyles Export

Sample eXtyles ORCID Workflow

1. Use Metadata Browse during Activation to import metadata from the manuscript’s corresponding XML transmittal file. Author names and ORCIDs from the transmittal are saved in the Word file, though they are not displayed to avoid any possibility of inadvertent alteration

Note: The Metadata Browse function can also import other fields such as DOIs or Funding data that may be in the transmittal file

2. Run eXtyles processes in the typical order.
3. Run Author Processing to tag author information in the author paragraph. This step automatically validates author names in the Word file against author names and ORCIDs from the transmittal file.
4. Resolve any warnings indicated by Author Processing, and re-run the process if necessary (see Error Resolution below).
5. Export manuscript to XML. During export, the validation of author names in the Word file against author names and ORCIDs from the transmittal file is repeated in case a change (deliberate or accidental) was made in the Word author paragraph after Author Processing.

Document Information Metadata Import

The Metadata Browse function can be used to import ORCID and author information from an XML transmittal file. When a

transmittal contains authors and ORCID, they are imported as a single XML block. If the XML transmittal format is JATS, the imported information might look like this:

```
<contrib-group>
<contrib contrib-type='author'>
<contrib-id contrib-id-type='orcid'>http://orcid.org/0000-0002-9193-5666</contrib-id>
<name><surname>Jauregui</surname><given-names>Cesar</given-names></name>
</contrib>
<contrib contrib-type='author'>
<name><surname>Otto</surname><given-names>Hans-J&#x00FC;rgen</given-names></name>
</contrib>
<contrib contrib-type='author'>
<contrib-id contrib-id-type='orcid'>http://orcid.org/0000-0002-3229-5662</contrib-id>
<name><surname>T&#x00FC;nnermann</surname><given-names>A.</given-names></name>
</contrib>
</contrib-group>
```

The transmittal contributor information is not shown in the Document Information dialog because it does not need to be edited within Word.

Transmittal Content Requirements

For the eXtyles ORCID synchronization process to work, the following rules must be observed:

- The transmittal must have only one <contrib-group> (or equivalent) containing all authors
- The <contrib-group> **must** contain the same number of authors as in the author paragraph(s) in the Word manuscript

Note: ORCID Synchronization supports merging ORCID, when the order of authors in the transmittal is different from the order of authors in the Word document. However, there is one exception: when the order differs and two authors have identical names, the merge will fail with a warning.

Authors are not required to have ORCID, for the eXtyles ORCID and author name synchronization process to work.

Transmittal DTD Requirements

The Document Information Metadata Browse function can be configured to import XML according to any XML model that is valid to a specific DTD. The DOCTYPE line of the transmittal must point to a valid DTD. It is best if this DTD is web-hosted, for example:

```
<!DOCTYPE article SYSTEM
"http://jats.nlm.nih.gov/publishing/1.1/JATS-journalpublishing1.dtd">
```

A web-hosted DTD ensures that the location of the transmittal DTD is stable and independent of internally-hosted directories, which may change over time.

ORCID, and Author Processing

Author Name Synchronization

During Author Processing, the content of the transmittal author group is compared with the authors in the manuscript author paragraph(s). Author Name Synchronization relies on the first initial and surnames of the authors during the matching phase; these must be unique for the process to be successful. Author Processing will give warnings if any of the following requirements are not met:

- The manuscript and transmittal file must have the same number of authors
- The manuscript and transmittal authors are listed in different orders and two or more authors have identical names
- Each ORCID must be unique; that is, two authors cannot have the same ORCID (this may seem like an odd error since every author has a unique ORCID, but we have heard stories about authors or production staff using cut/paste inappropriately with ORCIDs)
- The surnames of all Word and transmittal authors must match (after normalizing all letters and punctuation to plain ASCII).
- The given-names are not required to be the same because initials may be used in one place and spelled-out names used in others. Warnings are given:
 - If there are accent discrepancies between the Word and transmittal data
 - If there are given-name/initials discrepancies between the Word and transmittal data

However, the synchronization process is allowed to proceed when there are accent, surname, or given-name/initials discrepancies.

Example 1

Author Name Synchronization will successfully match the following two lists of authors:

- **Input 1:** Michael Sawaya, John G. Smith, Jane G. Smith, Mary A. Smith, John G. Smith
- **Input 2:** Michael Sawaya, John G. Smith, Jane G. Smith, Mary Smith, John G. Smith

Note that “Mary A. Smith” and “Mary Smith” are successfully synchronized because the initials and surname of this author (M + Smith) are unique in this author list.

Example 2

Author Name Synchronization will fail to match the following two lists of authors:

- **Input 1:** Michael Sawaya, John G. Smith, Jane G. Smith, Mary A. Smith, John G. Smith
- **Input 2:** Michael Sawaya, John G. Smith, Jane Smith, Mary A. Smith, John G. Smith

Although “Jane G. Smith” differs slightly from “Jane Smith,” the initials and surname of this author (J + Smith) are not unique in this author list.

Example 3

Author Name Synchronization will successfully match the following two lists of authors:

- **Transmittal:** <given-name>Eduardo</given-name> <surname>Cortes Gomez</surname>
- **Author Paragraph:**

Eduardo Cortes Gomez

Although Author Processing has mis-tagged the surname to be “Gomez,” Author Name Synchronization will correctly merge the author names. In this case a warning is given about the surname difference.

ORCID Synchronization

eXtyles currently supports exporting ORCID IDs when they are manually embedded in an author paragraph in the following format, whether the ORCID IDs are added to the author paragraph through the eXtyles ORCID Integration Suite or through manual copy/paste:

Jeffrey J. Bednarski (<http://orcid.org/1234-1234-1234-2227>)¹, Ruchi Pandey^{2*}, Emily Schulte¹,
Lynn S. White (<http://orcid.org/0000-0003-1324-9772>)¹, Bo-Ruei Chen², Gabriel J. Sandoval²,
Masako Kohyama (<http://orcid.org/1234-1234-1234-2225>)²

During Author Processing, eXtyles checks all ORCID IDs that are already in the author paragraph against the ORCID IDs found in the transmittal, and it will warn if there are discrepancies; that is, the ORCID for an author is different in the manuscript than in the transmittal. It does not report if the ORCID (a) is the same in both places or (b) exists in only one of the two places.

If all synchronization checks are successful, then a confirmation alert is given that the synchronization and merge was successful.

Note: This module can be configured to display ORCID IDs from the transmittal in the author paragraph of the manuscript (see ORCID Merge below). Note that while these displayed ORCID IDs might be inadvertently altered during editing and review, the same synchronization checks that are made during Author Processing are performed again during the Export process to minimize the risk of introducing an error.

Author Processing and Export support two or more non-contiguous author paragraphs (e.g. if the style is to interleave authors and affiliations). However, the transmittal file cannot have additional contrib-group elements for editors or investigators, unless the contrib-group containing the authors is distinguished by a unique attribute, e.g. `@content-type="author"`.

ORCID IDs and XML Export

NLM/JATS XML Export performs the same validations as Author Processing, regardless of Author Processing merging the ORCID IDs into the author paragraph. If the validation is successful, the ORCID IDs from the transmittal are integrated into the resulting XML. However, the author names from the manuscript are used in the exported XML, not the names from the transmittal.

Exports using the NLM DTD tag the ORCID with `ext-link`. Exports using JATS tag the ORCID with `contrib-id`. In JATS version 1.1 and later, the `authenticated` attribute is supported.

ORCID Merge

During both Author Processing and Export, when ORCID Merge is enabled, any pre-existing ORCID IDs are removed from the author paragraph before merging the ORCID IDs from the transmittal. This means that if one author has an ORCID in the manuscript, but not in the transmittal, that ORCID will not be in the final XML.

For consistency, eXtyles will remove any prefix to the ORCID that may or may not appear in the manuscript and transmittal; for example, “(http://orcid.org/1234-5678-9012-345X)” will be reduced to simply “1234-5678-9012-345X”. Then the ORCID will be formatted to:

- **Author Processing:** “(http://orcid.org/1234-5678-9012-345X)”
- **Export:** “http://orcid.org/1234-5678-9012-345X”

If the final “X” is (incorrectly) lower case “x”, it is forced to “X”. At this time, the ORCID check-digit is not validated by eXtyles.

ORCID Synchronization Results

When using the ORCID Synchronization process, Author Processing and Export can have one of three possible results:

- **Success:** No follow up action is required
- **Success with discrepancies in an alert:** Follow up action may be required. See Error Resolution below
- **Failure:** Follow up action is required. See Error Resolution below

Error Resolution

Important Note: When the text “following the procedures of your organization” is used below, it means that the process to reconcile discrepancies between the Word and transmittal files is a **business matter** for the organization, not a technical matter. We strongly urge all eXtyles customers who license the eXtyles ORCID Integration Suite to review the cases below and setup an appropriate workflow to resolve each possible error.

Errors can be resolved in the following ways:

If there is a discrepancy between the author name in the manuscript and the name in the transmittal (e.g. accents, surnames, initials/given name), you must fix the manuscript because the author names from the manuscript are used in the XML. In some cases, Author Processing may have incorrectly styled the given name and surname of an author. In this case, the error should be resolved by manually applying the correct character styles the author name in the Word file.

If there are duplicate ORCID IDs in the transmittal, you must fix the information in the transmittal (following the procedures of your organization) and re-import it using the Document Information dialog.

If there are duplicate ORCID IDs in the author paragraph of the manuscript, you must fix the information in the manuscript (following the procedures of your organization).

If there are discrepancies between the ORCID IDs in the manuscript and the transmittal, you should carefully check both sets of ORCID IDs and fix them (following the procedures of your organization). If any fixes are made in the transmittal, you must re-import it with the Document Information dialog.

If there are different numbers of authors in the manuscript and transmittal (most likely there are fewer in the transmittal), you must fix the Word and/or transmittal files (following the procedures of your organization) so that both

files have the same number of authors. Then you must re-import the transmittal with the Document Information dialog.

Note: In cases where the transmittal must be updated to resolve a problem, it is a business decision for the organization to determine if the problem must be corrected in the system where the transmittal originated and then to re-export the transmittal.

Additional Synchronization Features

Email Address Merge

Author email addresses that are in the transmittal may now be picked up and either a) merged into the author paragraph, and/or b) exported only into the final XML. If you would like this feature enabled, please contact eXtyle Support.

Funding References

Cross-references between authors and specific funding awards that are in the transmittal may now be picked up and merged into the exported XML. If you would like this feature enabled, please contact eXtyle Support.