

# Inera's Reference Processing Tools: eXtyles versus Edifix

## The Reference Processing Core

Inera's bibliographic reference-processing tools, developed for the Word-based solution eXtyles and now also integrated into the cloud solution Edifix, use a unique processing core that can identify the components of a reference regardless of the style used by the author of the list. This means you don't have to worry about that author who uses several creative styles in one bibliography. This highly accurate identification of reference elements is then used to automatically reformat the references to a specific editorial style, significantly reducing editorial time and increasing the accuracy of published references. Once the reference is reformatted according to a preferred style, additional "fuzzy matching" tools can link the reference to its record on CrossRef and/or PubMed and return data that can be used to automatically correct the reference and insert any missing pieces.

While this processing core is found in both of Inera's publishing solutions—the Bibliographic Reference Processing modules of the eXtyles suite and Edifix—the user interface and results provided by each solution are somewhat different. This guide provides an overview of the similarities and differences for customers who are using both products. Questions addressed include:

- **What reference features are included (or available) in eXtyles that are not included in Edifix, and vice versa?**
- **Why do the reference results look different in the two solutions, and does that affect how I should work with the processed references?**
- **What are the optimal ways to use each tool?**

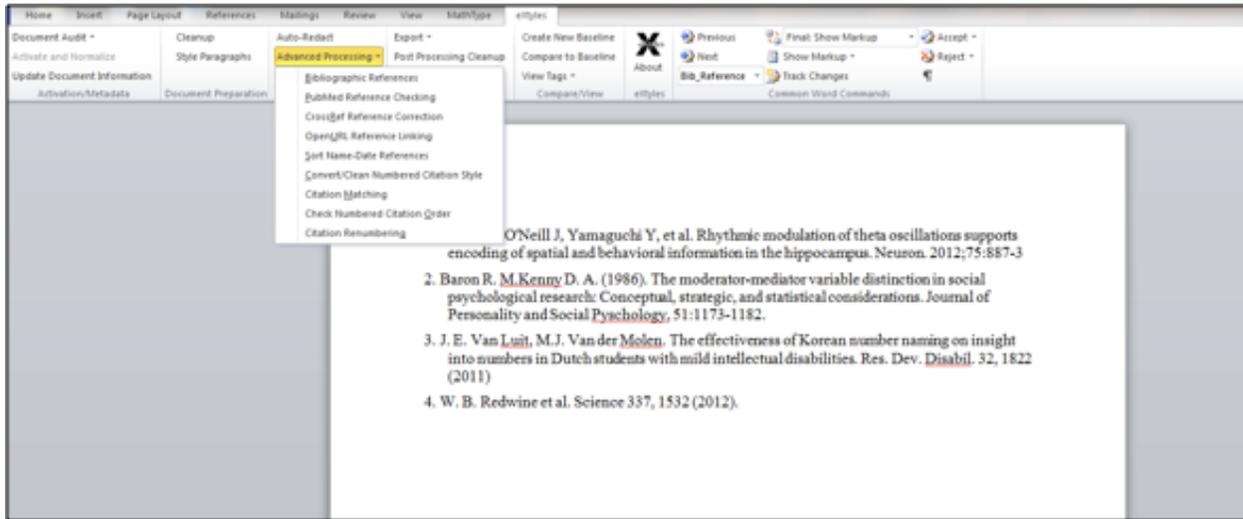
## Using the Tools

In eXtyles, the reference processing tools are separate modules listed on the Advanced Processing menu, each of which comprises a step in your editing workflow:

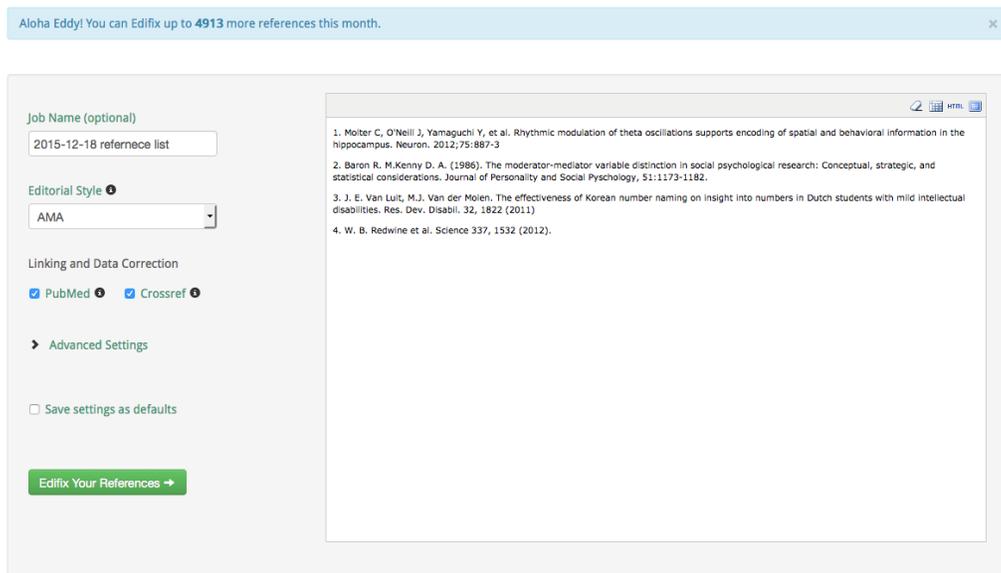
1. Bibliographic Reference Processing
2. PubMed Reference Linking/Correction
3. CrossRef Reference Linking/Correction

4. (optional) Duplicate Reference Checking
5. (optional) Name-Date Reference Sorting

The Advanced Processing menu also includes tools for checking and editing in-text citations to your references, features that are not included in Edifix.



In Edifix, reference processing is the exclusive function of the application. When you sign in to Edifix, you are immediately brought to the “New Edifix Job” page. From here, you select your editorial style and whether you want your references linked to PubMed or CrossRef (or both). Rather than bring the reference processing tools to your (Word) content, as you do with eXtreme, with Edifix you bring your content to the reference processing tools. Simply paste in your reference list (called a job) and click “Edifix Your References.” Edifix runs Reference Processing, PubMed/CrossRef Linking and Correction, and Duplicate Reference Checking all at the same time.



Note that while running all reference processes at once saves some time, the ability to run each process individually in eXtyles gives you the additional option of addressing any problems before the next step. You can also re-process a given reference at any point. In Edifix, you must resubmit the reference as a new job.

## Copy editing to a Style Template

Both eXtyles and Edifix use style templates to copyedit your reference list to a preferred editorial style. Pre-built templates for popular styles—AMA, APA, Chicago, etc.—as well as custom templates are available for both applications. However, unless you plan on accessing your style template programmatically using the Edifix API, all custom templates on Edifix will be available to the public. For those publishers who want their authors or freelance editors to have access to those templates, this is a great bonus!

## Non-Journal References

Because eXtyles and Edifix use the same reference-processing technology, both tools support full or partial processing of the same types of references: journals, books, and conference proceedings (journal and book references can be fully edited and linked; references to conference proceedings can be linked but not auto-edited). However, the ability to process book and conference references is an additional feature for eXtyles that must be licensed separately. In Edifix, processing of these non-journal references is an integrated part of the tool, with no additional fee required.

## Reference Linking and Correction

Both eXtyles and Edifix offer Linking and Correction tools that validate references against the online PubMed and/or CrossRef databases, insert a link at the end of each reference to its corresponding database entry, and provide feedback on the accuracy of certain reference elements.

Edifix includes the PubMed and CrossRef Linking and Correction tools, each of which can be enabled or disabled on a job-by-job basis. These tools run concurrently with reference processing, and all results are displayed at the end. PubMed ID links are always displayed in the format PMID:12345, and CrossRef DOIs are always displayed as the full URL.

eXtyles offers additional flexibility in the format of the inserted link, the number and type of warnings you want to receive, and what elements should be automatically corrected.

## Viewing Your Results

References that have been processed by eXtyles are colorful. During Reference Processing, eXtyles applies specific character styles to each reference element, indicating the identity of the element with a colored style (e.g., journal titles are styled with the bib\_journal character style).

These character styles play a role in reference linking, citation matching, and exporting XML, although they can also be easily removed using Post-Processing Cleanup.

When eXtyles identifies an error in the style or accuracy of your reference that it cannot safely resolve, it inserts a Word comment describing the error. The number and type of warnings that are inserted can be adjusted to meet your workflow or editorial requirements.

The screenshot shows a list of four references with corresponding comments in a Word document. The references are color-coded: reference 1 is blue, reference 2 is green, reference 3 is red, and reference 4 is purple. Comments are shown in colored boxes on the right, with dashed lines pointing to the specific parts of the references they address.

<jrn>1. Molter C, O'Neill J, Yamaguchi Y, Hirase H, Leinekugel X. Rhythmic modulation of theta oscillations supports encoding of spatial and behavioral information in the hippocampus. *Neuron*. 2012;75(5):887-3. doi:10.1016/j.neuron.2012.06.036. PubMed<jrn>

<jrn>2. Baron RM, Kenny DA. The moderator-mediator variable distinction in social psychological research: Conceptual, strategic, and statistical considerations. *J Pers Soc Psychol*. 1986;51(6):1173-1182. doi:10.1037/0022-3514.51.6.1173. PubMed<jrn>

<jrn>3. Van Luit JE, Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. *Res Dev Disabil*. 2011;32(5):1822-1828. doi:10.1016/j.ridd.2011.03.014. PubMed<jrn>

<jrn>4. Redwine WB, Hernandez-Lopez R, Zou S, Huang J, Reck-Peterson SL, Leschziner AE. Structural Basis for Microtubule Binding and Release by Dynein. *Science*. 2012;337(6101):1532-1536. doi:10.1126/science.1224151. PubMed<jrn>

**Comment [CG1]:** CrossRef reports the first page should be "889" not "887" in reference 1 "Molter, O'Neill, Yamaguchi, Hirase, Leinekugel, 2012".

**Comment [CG2]:** Medline reports the first page should be "889" not "887" in reference 1 "Molter, O'Neill, Yamaguchi, et al, 2012".

**Comment [CG3]:** Please verify the page numbers (887-3) (in reference 1 "Molter, O'Neill, Yamaguchi, et al, 2012").

**Comment [CG4]:** eXtyles has corrected the author-provided journal name. "Journal of Personality and Social Psychology". Please check the replacement name. (in reference 2 "Baron, Kenny, 1986").

**Comment [CG5]:** Medline reports that reference 3 "Van Luit, Van der Molen, 2011" was retracted in "Res Dev Disabil, 2011 Nov-Dec;32(6):3018".

**Comment [CG6]:** Reference has only first page number. Please provide the last page number if article is longer than one page. (in reference 3 "Van Luit, Van der Molen, 2011").

**Comment [CG7]:** The article title is missing from this reference. Please provide one. (in reference 4 "Redwine, et al, 2012").

**Comment [CG8]:** "Et al" found after fewer than 3 authors. Please check reference (in reference 4 "Redwine, et al, 2012").

**Comment [CG9]:** Reference has only first page number. Please provide the last page number if article is longer than one page. (in reference 4 "Redwine, et al, 2012").

## Tracked Changes

Because Tracked Changes cannot be enabled during eXtyles processing, the best way to view changes made to your reference list is to create a baseline file before running the Reference Processing modules, and then use Compare to Baseline. However, when many changes have been made to a reference list, the differences shown in the Compare to Baseline view can be very difficult to review; often, Word will forgo granularity altogether and show a "deleted" old version and an "inserted" new version of the reference list.

1. Molter C, O'Neill J, Yamaguchi Y, et al. Rhythmic modulation of theta oscillations supports encoding of spatial and behavioral information in the hippocampus. *Neuron*. 2012;75:887-3

2. Baron R, Kenny D-A. (1986). The moderator-mediator variable distinction in social psychological research: Conceptual, strategic, and statistical considerations. *Journal of Personality and Social Psychology*, 51:1173-1182.

3. J. E. Van Luit, M.J. Van der Molen. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. *Res. Dev. Disabil.* 32, 1822 (2011)

4. W. B. Redwine et al. *Science* 337, 1532 (2012).

<im>1 Molter C, O'Neill J, Yamaguchi Y, Hirase H, Leinekugel X Rhythmic modulation of theta oscillations supports encoding of spatial and behavioral information in the hippocampus. *Neuron* 2012;75(5):887-3 doi:10.1016/j.neuron.2012.06.036 PubMed</im>

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<im>3 Van Luit JE, Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. *Res Dev Disabil* 2011;32(5):1822-1828. doi:10.1016/j.ridd.2011.03.014. PubMed</im>

<im>4 Redwine WB, Hernandez-Lopez R, Zou S, Huang J, Reck-Peterson SL, Leschziner AE. Structural Basis for Microtubule Binding and Release by Dynein. *Science* 2012;337(6101):1532-1536. doi:10.1126/science.1224151. PubMed</im>

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Edifix does not label each piece of the reference. Instead, it shows you what changes have been made to the reference as a whole using the familiar markup style of Word's Tracked Changes. Any comments or warnings pertaining to a reference are listed in a yellow block under the reference. References that have not been fully parsed or styled are displayed in grey text, sometimes with an accompanying comment depending on how little of the reference was changed. This is different from how eXtyle displays references that haven't been parsed.

While you can toggle the reference tags (e.g., <jrn>) to show or hide in eXtyle, Edifix offers three different views for reviewing your Edifixed references:

- Show Changes: This view displays the all tracked changes, inserted links, and comments.
- References + Links/Comments: This view displays your Edifixed references plus all inserted links and comments.
- References Only: This view displays only your Edifixed references.

References Only    References + Links/Comments    Show Changes

1. Molter C, O'Neill J, Yamaguchi Y, Hirase H, Leinekugel X. Rhythmic modulation of  $\theta$  oscillations supports encoding of spatial and behavioral information in the rat hippocampus. *Neuron*. 2012;75(5):889-903. <http://dx.doi.org/10.1016/j.neuron.2012.06.036>. PMID:22958828.

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2. Baron R. M. Kenny RM, Kenny DA D. A. (1986). The moderator-mediator variable distinction in social psychological research: Conceptual, conceptual, strategic, and statistical considerations. *Journal of Personality and Social J Pers Soc Psychol. Psychology*, 1986;51(6):1173-1182.

3. Van Luit JE, Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. *Res Dev Disabil*. 2011;32(5):1822-1828. <http://dx.doi.org/10.1016/j.ridd.2011.03.014>. PMID:21498042.

3. J. E. Van Luit JE, M. J. Van der Molen MJ. The effectiveness of Korean number naming on insight into numbers in Dutch students with mild intellectual disabilities. *Res Dev Disabil*. 2011;32

**Copy References to Clipboard**

Select File Type **Export**

**Job Name:**

2015-12-18 referenece list **Update**

**Editorial Style:** AMA

Statistics	References
Submitted	4
Parsed	4
Linked to Crossref	4
Linked to Pubmed	4
Billable	0

Unexpected results? Find answers and solutions in the [Edifix FAQ](#).

**Report Issue**

## Post-Processing Modifications

After your references have been processed, you may want to make additional edits, such as correcting references based on inserted warnings or manually fixing references that were not fully parsed.

Because eXtended documents are processed in Word, you can manually edit your references at any stage of processing. Once character styles have been applied, however, you must be very careful to avoid applying the wrong style, or applying a style to the wrong element, like a trailing period.

If you are using Edifix, the references cannot be edited within the application once they have been processed. However, you can easily copy your references from any View (i.e., with or without tracked changes and comments) and paste them into Word for further editing.

## Feature Comparison Table

eXtyles is a highly configurable solution, with most features presented as available options rather than tools included as part of a standard package. Edifix, on the other hand, has a number of standard included features as well as additional available options.

<b>Feature</b>	<b>eXtyles</b>	<b>Edifix</b>
Copy editing to a standard style	Available	Included
Custom style templates	Available	Available
PubMed Reference Linking and Correction	Available	Included
CrossRef Reference Linking and Correction	Available	Included
Custom Reference Linking and Correction settings	Available	Not Available
Non-journal reference processing	Available	Included
Duplicate Reference Checking	Available	Included
Reference Sorting	Available	Not Available
Citation Processing	Included	Not Available
Export to NLM/JATS DTD XML	Available	Included
Export to RIS format	Available	Included
Export to MEDLINE format	Available	Included
API access	Not applicable	Available
Reference volume	Unlimited references	Subscription tiers based on number of references processed