Bibliographic and Normative Reference Processing

eXtyles greatly reduces the time an editor must spend editing normative 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 (standard, journal, book, etc.) and restructures references based on your organization's publication style.

Paragraphs that were styled as Normative References or Bibliographic References are restructured during this step. After running Auto-Redact, select Advanced Processing > Bibliographic References from the eXtyles menu.

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 eXtyles has identified. Possible types are:

- **<jrn>** Journal references
- **<bok>** Book references
- **<edb>** Edited book or book chapter references
- **<std>** Standard references
- **<conf>** Conference proceeding
- **<eref>** Reference to a website
- **<lgl>** Citation of a legal case or statute
- **<ths>** Reference to a thesis/dissertation
- **<other>** References to working papers, patents, maps, and other documents
- **<unknown>** Unsupported or otherwise unknown reference type

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	Example Text
bib_surname	Klingensmith
bib_fname	GJ
bib_article	Glucocorticoid treatment...
bib_journal	Journal of Pediatrics
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.

Automatic Processing of 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.

Automatic Processing of Journal References

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.

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

<jrn>Klingensmith, G. J., et al. "Glucocorticoid treatment of girls with congenital adrenal hyperplasia: Effects on height, sexual maturation, and fertility." Journal of Pediatrics 90 (1977): 996–1004.</jrn>

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

Book and Conference Proceedings References

The ISO configuration of eXtyles also includes the book processing add-in module, which automatically processes non-journal references such as books and conferences. After Bibliographic Processing is run, a typical book reference looks like this:

<bok>Gibbs, A. J., et al. Molecular Basis of Virus Evolution. Cambridge University Press, Cambridge, UK. 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, A. J., et al. Molecular Basis of Virus Evolution. Cambridge University Press, Cambridge, UK. 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.

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.

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. eXtyles 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, P. A. "Protein regulation by phosphatidylinositol lipids." Chemistry & Biology 2, no. 1 (1995): 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.

Warning: 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 Bibligraphic References processing function are displayed on screen.

Character Styling of 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.

Styles that may be used for reference entries include the following:

Style	Use
bib_number	The reference number
bib_etal	"et al." when it appears in the reference
bib_surname	An author's surname
bib_fname	An author's given name or initials
bib_suffix	An author's suffix (e.g., Jr., Sr.)
bib_organization	An organization name as an author
bib_article	The article title
bib_journal	The journal name
bib_year	The year of publication
bib_volume	The volume of publication
bib_issue	The issue of publication

Style	Use
bib_month	The month or season of publication
bib_suppl	The publication supplement
bib_fpage	The first page of publication
bib_lpage	The last page of publication
bib_unpubl	Pre-publication information such as "in press"
bib_comment	A comment such as [Abstract]
bib_url	A URL included in a journal reference
bib_doi	A DOI inclded in a journal reference
std_docNumber	The document number of a standard
std_docPartNumber	The part number of a standard
std_docTitle	The title of a standard
std_documentType	The document type of a standard
std_publisher	The publisher of a standard
std_section	The section of a standard
std_year	The publication year of a standard