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eXtyles®

User  
Documentation

BIBLIOGRAPHIC REFERENCE PROCESSING

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# BIBLIOGRAPHIC REFERENCE PROCESSING

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. 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 eXtyles, 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.

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

## AUTOMATIC PROCESSING OF JOURNAL REFERENCES

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

```
<jrn>Klingensmith GJ, Garcia SC, Jones HW, Migeon CJ, Blizzard RM. Glucocorticoid treatment of girls with congenital adrenal hyperplasia: effects on height, sexual maturation, and fertility. J Pediatr 1977;90:996-1004.</jrn>
```

### Custom Reference Templates

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.

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
- <conf>          Conference proceeding
- <eref>          Reference to a website

- <lg|> 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	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.

## AUTOMATIC REFERENCE PROCESSING OF NON-JOURNAL REFERENCES

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.` 1995. Molecular Basis of Virus Evolution. Cambridge University Press, Cambridge, UK.`</bok>`

`<edb>`Fenner F and Cairns J. 1959. Variation in virulence in relation to adaptation to new hosts, pp. 225-249 in The Viruses, Vol. 3. Animal Viruses, edited by Burnet, F. M. and W. M. Stanley. Academic Press, NY.`</edb>`

`<eref>`Martin D and Tate N. 1997. Surpop V2.0: introduction. (Online.) Census Dissemination Unit, University of Manchester, Manchester. Available from <http://census.ac.uk/cdu/surpop/> (accessed 3 March 1998).`</eref>`

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” on page 5 for more information.

## Editing Processed References:

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.

## 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:

```
<bok>Janmey PA. (1995). Protein regulation by phosphatidylinositol lipids. Chem. Bio. 2, :61-65.</bok>
```

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 PA. (1995). Protein regulation by phosphatidylinositol lipids. Chem. Bio. 2, 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 Bio 1995;2:61-65.</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 Bibliographic 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
<code>bib_number</code>	The reference number
<code>bib_et al</code>	"et al." when it appears in the reference
<code>bib_surname</code>	An author's surname
<code>bib_fname</code>	An author's given name or initials
<code>bib_suffix</code>	An author's suffix (e.g., Jr., Sr.)
<code>b i b _ organization</code>	An organization name as an author
<code>bib_article</code>	The article title
<code>bib_journal</code>	The journal name
<code>bib_year</code>	The year of publication
<code>bib_volume</code>	The volume of publication
<code>bib_issue</code>	The issue of publication
<code>bib_month</code>	The month or season of publication
<code>bib_suppl</code>	The publication supplement
<code>bib_fpage</code>	The first page of publication
<code>bib_lpage</code>	The last page of publication
<code>bib_unpubl</code>	Pre-publication information such as "in press"
<code>bib_comment</code>	A comment such as [Abstract]
<code>bib_url</code>	A URL included in a journal reference
<code>bib_doi</code>	A DOI included in a journal reference