

INERA
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eXtyles®

User
Documentation

CITATION MATCHING

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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:

- 1 Identifies all in-text bibliographic citations for which there is not a matching reference entry.
- 2 Identifies all reference entries for which there is not at least one in-text citation.
- 3 Identifies all figure, table, and box callouts for which there is not a matching figure legend or table title.
- 4 Identifies all figure legends, box legends, and table titles 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.

USING CITATION MATCHING

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.

CITATION MATCHING QUERY INSERTION

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).

Similarly, Citation Matching automatically applies the character styles `cite_fn`, `cite_fig`, `cite_box` and `cite_tbl` to all callouts in text to footnotes (except author line footnotes) and numbered figures, boxes, and tables, respectively. Occasionally, eXtyles will fail to automatically apply these styles during Citation Matching. In such cases, the appropriate style must be applied by hand from the Word Styles menu to the callout. Citation Matching can then be run again to ensure the accuracy of these hand-applied 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

- 1 *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.
- 2 *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

- 1 *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.
- 2 *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).
- 3 *Incorrect date:* If the dates are not identical, a match will not be made.
- 4 *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.

- 5 *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	I n c o r r e c t 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

- 6 *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.
- 7 *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:

- 1 *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.
- 2 *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.
- 3 *Blank lines:* No empty paragraphs are allowed in the reference section.
- 4 *Extra returns:* Make sure that each reference is contained in a single paragraph. Extra returns in the middle of a reference will cause problems.
- 5 *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”.
- 6 *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 μm)”.

NUMBERED SUPERSCRIPIT CITATION MATCHING

In addition to the characteristics listed in this section for all numbered citations, eXtyles carefully checks superscript numbers to ensure that they are citations and not part of mathematical expressions:

- 1 *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.” and “This is a simple citation range.²⁻⁴”
- 2 *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

3 *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., 10^7)
- Any mathematical character (such as +, −, or /) immediately prior to a superscript number