



Editorial and XML  
Solutions for Publishers

## **Inera Highlights and eXtyles Enhancements**

**Elizabeth Blake**  
Director of Business Development

# A Few Notes on XUG Presentations

- ▶ Images in this presentation are hyperlinked
- ▶ This and other talks will be uploaded to our XUG page throughout the day
  - ▷ ... Because we can't have you reading ahead!
  - ▷ Agenda items will be linked to PDFs of our slides

www.inera.com/customers/eXtyles-user-group-meeting

“It's a pleasure to promote eXtyles, as it really does magic in our documents.”

**Serge Juillerat**

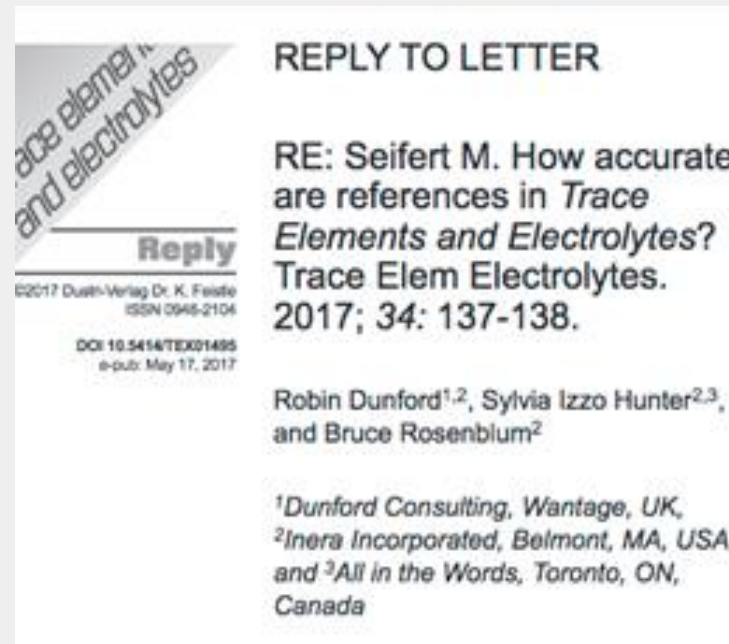
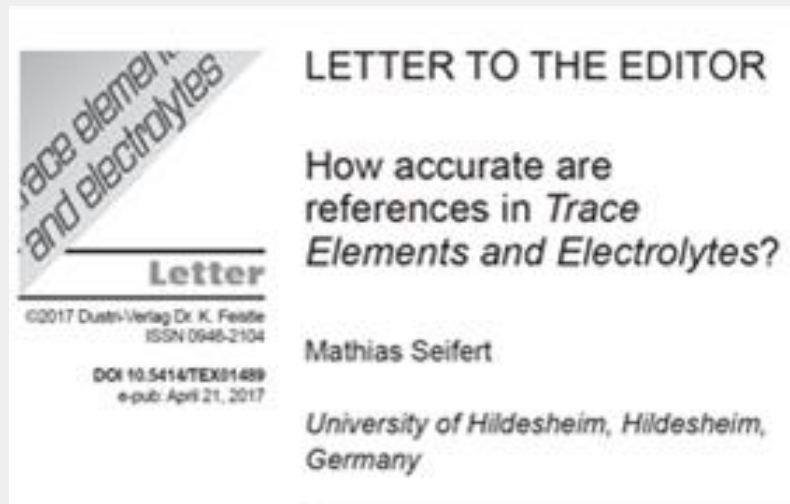
System Specialist at the International Organization for Standardization

9:30 a.m.	Opening Remarks <i>Bruce Rosenblum and Irina Golfman, Inera</i>	George Washington Ballroom
9:40 a.m.	Inera Highlights and eXtyles Enhancements <i>Elizabeth Blake, Inera</i>	George Washington Ballroom
10:00 a.m.	Metadata: How Much More Complicated Can It Get? <i>Terry Ehling, MIT Press</i> <i>Gabriel Harp, Cell Press</i> <i>Rob O'Donnell, Rockefeller University Press</i> <i>Chuck Koscher, Crossref</i>	George Washington Ballroom

# Some Inera Highlights

# Inera 2017 Publications

## Study on reference accuracy (and our reply)



# Inera 2017 Presentations

Access all this (and more!) from the Inera News page

## Word Tips for Editors

**Elizabeth Blake**  
Inera Inc.

CSE 2017  
Tuesday, May 23



## SETTING SAIL

Navigating the Future of Science Publishing

**2017 CSE Annual Meeting | May 20-23, 2017**

San Diego, CA | Sheraton San Diego Hotel & Marina  
[councilscienceeditors.org](http://councilscienceeditors.org)

SSP Annual Meeting  
May 31, 2017

## Find Your Path: The Four Roads to XML

**Bruce Rosenblum**  
CEO, Inera Inc.

**Chandi Perera**  
CEO, Typefi Systems

INERA  
eXtyles | editix

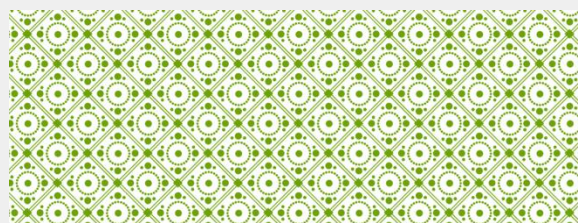
TYPEFI™

## <JATS> XML and Related Publishing Standards



**Bruce D. Rosenblum**  
CEO, Inera Incorporated  
NISO JATS Standing Committee  
Consultant to Crossref

ABEC XXV CEC, São Paulo, Brasil 23 June 2017



## CONTEXTUAL EDITING USING MARKUP

**Sylvia Izzo Hunter**  
Editor/Writer, All in the Words  
Communications & Marketing  
Specialist, Inera

## Finding the Tipping Point in Automated Markup During Up-Translation

*[or, Cyborgs are the Future of Scholarly Publishing]*

**Caitlin Gebhard**  
Inera Inc.



# Customer Case Studies

- ▶ Two Edifix case studies
- ▶ Please let us know if you'd like to be the subject of an eXtyles case study

## Case Studies

*Learn how Edifix is helping publishing organizations around the world.*

### Caboverde and Edifix

#### Improving Citation Accuracy to Close Gaps in the Scholarly Communications Chain

Founded by director Alvaro Bussab in 1994, [Caboverde](#) is a full-service supplier to the scientific and scholarly publishing community in Brazil, and since 1998 it has delivered more than 180,000 articles to [SciELO](#) (Scientific Electronic Library Online). Located in São Paulo, Caboverde began using Edifix in 2014.

Caboverde's mission is to minimize the gap between links in the information chain. Their services include digital imaging, file conversion, design, consulting, composition, and development.

**CABOVERDE**

By replacing the former, 100%-manual process with Edifix's automation, Caboverde is better able to fulfill their mission to "minimize the gap between links in the information chain."

[Download PDF](#)

# eXtyles Enhancements

# Enhanced Online Documentation: eXtypes User Common Room

<https://inerainc.atlassian.net/wiki/spaces/EXU/overview>

<https://inerainc.atlassian.net/wiki/spaces/EXU/pages/17580800/Preparing+your>


**eXtypes User Common Room** Pages

## Preparing your document

**Caitlin Gebhard**  
Last modified Oct 02, 2017

### First things first

The first step in the eXtypes 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 eXtypes Support at any time. Simply email us at [eXtypes-support@inera.com](mailto:eXtypes-support@inera.com) or through our [Support Portal](#). We'll be happy to help!

<https://inerainc.atlassian.net/wiki/spaces/EXU/overview>

## eXtypes User Common Room



### Welcome to the eXtypes User Guide!

The eXtypes family of editorial and XML solutions allows 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 eXtypes processes are run in Microsoft Word, providing a familiar, easy-to-use environment that requires no XML expertise.

eXtypes User Documentation found in this guide provides a comprehensive overview of eXtypes. Both novice and advanced users will find this documentation useful, as it serves as both a "quick start guide" and as a detailed reference for each function in the eXtypes process. Each organization's configuration of eXtypes is unique, and you may not have access to every feature detailed in the documentation. If a feature is *not* included in eXtypes NLM configurations, the documentation will include a note at the top of the page.

If you or your organization has any questions regarding eXtypes or this documentation, please contact eXtypes Support at [eXtypes-support@inera.com](mailto:eXtypes-support@inera.com).

**Download the PDF here:**  
[eXtypes\\_User\\_Guide\\_20171002.pdf](#)

### Start navigating

- [Getting started with eXtypes](#)
- [Preparing your document](#)
- [Styling and Editing](#)
- [Processing and Validation](#)
- [Post-Processing Cleanup](#)
- [JATS/NLM XML Export](#)
- [Insert Tags](#)
- [Baseline Copies](#)
- [eXtypes and Footnotes/Endnotes](#)
- [eXtypes and Tracked Changes](#)
- [eXtypes Shortcut Keys](#)
- [Special Characters in Word](#)



# Enhanced Online Documentation: eXtypes NLM (Paragraph) Style Guide

<https://inerainc.atlassian.net/wiki/spaces/EXU/pages/13893902/eXtypes+NLM+Style+Guide>

The eXtypes NLM Style Guide is designed to help you understand the purpose, flexibility, and limitations of each paragraph style available in eXtypes NLM. Each paragraph style is accompanied by a description of its purpose and place in the eXtypes workflow. Most descriptions also include a link to the corresponding JATS XML element in the JATS Tag Library. If you have any questions about how a style should be used or what style should be applied to your content, feel free to contact the eXtypes User Group.

## In this section

- Front Matter Styles
- Translated Styles
- Body Styles
- List Styles
- Object Styles
- Back Matter Styles
- Character Styles
- Additional Information



eXtypes User Common Room

### ← Pages

- › Front Matter Styles
- › Translated Styles
- › Body Styles
- › List Styles
- › Object Styles
- › Back Matter Styles

Appendix Styles

Acknowledgements and Author Notes

Reference Lists and Bibliographies

Notes Added in Proof

Supplementary Material Styles

Author Biographies

› Character Styles

› Additional Information



Notes added in proof generally refer to late-breaking material that is added after the article has been typeset and proofread by the author(s) and/or a proofreader. This page describes how this material should be handled in Word using the Note in Proof style in order to generate correct XML.

## Note in Proof

The **Note in Proof** style should be used to indicate material that is added at a late stage of production, after the article has first been typeset and proofread by the author(s) and/or a proofreader. Note that there is no heading style for this content by default. In the example below, the heading is presented as run-in bold text. In the XML, it is mapped to regular bold text, not to a separate <label> or <title> element.

According to the [documentation for the JATS DTD](#), "A Note in Proof contains late-breaking news items or other material produced while the document was being typeset or was otherwise in production, that therefore happened too late to be included in the text of the work. This is typically NOT peer-reviewed content, and citations to other material within such content are usually integrated into the text or put inside the last paragraph, not listed separately in a bibliographic reference list."

## Example



The following example demonstrates the use of the **Note in Proof** paragraph style. This illustration is an excerpt from the sample document: [Sample\\_1\\_Math-in-Word.docx](#)

Note\_in\_Proof

**Note Added in Proof:** Do am he horrible distance marriage so although. Afraid assure square so happen mr an before.

### JATS XML Example

▼ Collapse source

```
<back>
  <notes>
    <p content-type="note added in proof"><b>Note Added in Proof:</b> Do am he horrible distance marriage so happen mr an before.</p>
  </notes>
  ...
</back>
```

Author Processing		Y	AMA	Added a Word comment warning when a four or more part author name is divided into one surname part and 3 or more given-name parts, e.g. 'Clemson David Munoz Smith' is divided into given-name "Clemson David Munoz" and surname "Smith" by author processing. Such names need manual editorial review, so the warning is now added
Author Processing	Admin	N		Added support for some basic cases of surname before given-name: a) YANG You Long, when first part is ALL CAPS and therefore a surname; note that this requires a two-part mixed case given-name to work b) Smith, J.A., when initials only follow a surname
Author Processing		N		Added Sir and Dame as titles that can appear before author names
Author Processing		Y	Inera	Treat "V" in "R. Hinds, V. Bansal" as initial, not generation indicator
Author Processing		N		Added support to correctly parse initials when the author is missing a space before surname
Author Processing		Y	Inera	Add support for surname when the author is missing a space before surname
Author Processing		Y	Inera	Added support for prefix in name, e.g. "John Smith"
Author Processing		N		Added support for authors with mixed case given names and upper case surnames, e.g. "Lo Min CHAN"
Author Processing	Admin	N		Added support for surnames with unusual capitalization, e.g. "IJitsma" or "AchutaRao"
Author Processing		N		Added support for the feminine ordinal indicator in a name, as in "Ana M&ordf;", which is short for "Maria"

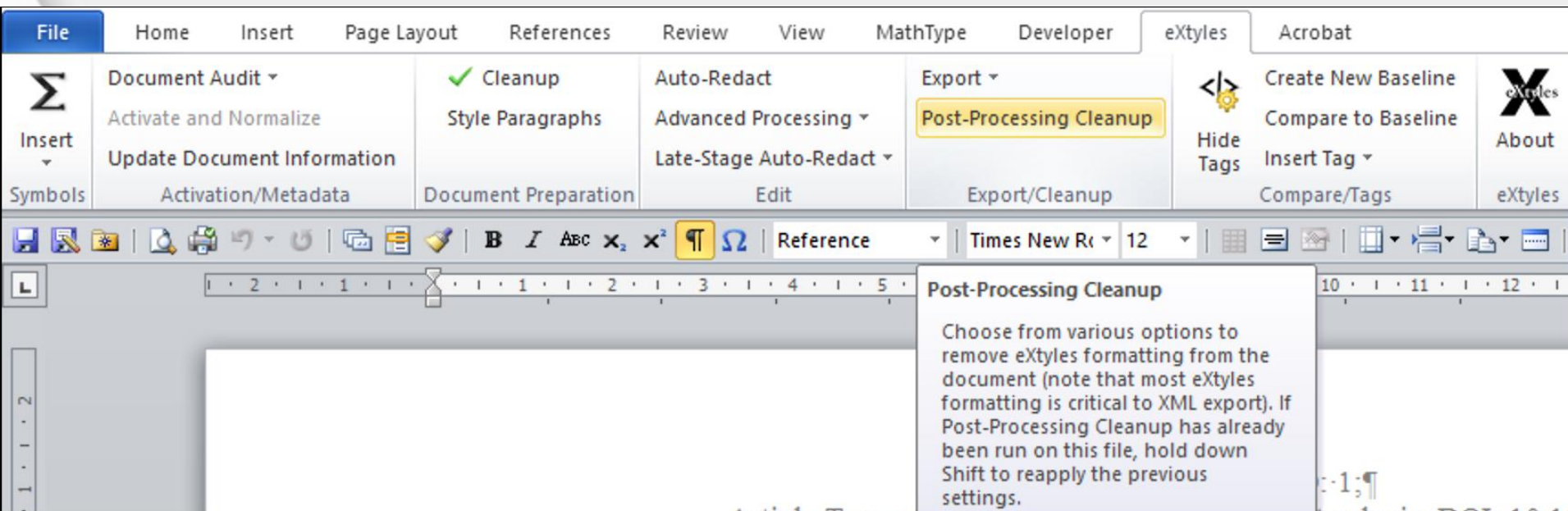
After 25 years, it seems scholarly publishing  
still has the capacity to terrify us...

# ... But We Soldier On!

- ▶ Release notes include a comprehensive overview of improvements
- ▶ More than 350 items in our master release notes since XUG 2016
- ▶ This year, we've developed quite a few cool new eXtyles features and options
- ▶ We'll be demonstrating them this afternoon

# Interface Improvements

- ▶ Slightly reorganized ribbon
- ▶ At long last... Tool Tips!
  - ▷ eXtensible ribbon
  - ▷ Cleanup, Post-Processing Cleanup, and Compare to Baseline dialogs
  - ▷ Paragraph Styling palette



# New Features

- ▶ Enhanced Auto-Redact
  - ▷ Enables staging of Auto-Redact
  - ▷ Takes advantage of Advanced Processing
  - ▷ Allows for multiple lists of rules
- ▶ Update Stale Metadata option
  - ▷ Option to warn at XML export if metadata in the Document Information dialog has not recently been updated

# New Features

- ▶ Reapply Styles feature
  - ▷ Useful for manuscripts that have templates applied prior to eXtyle processing
  - ▷ Useful for removing local formatting overrides
- ▶ New Cleanup/Post-Processing Cleanup tools
  - ▷ Including a few handy new features requested at previous XUG meetings!
- ▶ Improved ORCID integration
  - ▷ Many improvements around handling of data from the transmittal file and complex author conditions

# Journal Database

- ▶ Added ~3,000 journal titles to the eXtyle journal database from the CABI index
- ▶ Added ~720 journal titles to the eXtyle journal database from the SciELO list
- ▶ About 100 customer-submitted journals a month are added

# New Product: eXtypes STS

- ▶ The latest "off-the-shelf" eXtypes product
  - ▷ Similar to eXtypes NLM, which is a solution for PMC-compliant JATS XML
  - ▷ eXtypes STS is a pre-configured solution for standards publishers who wish to create NISO STS XML
- ▶ eXtypes STS can be:
  - ▷ Licensed as-is
  - ▷ Used for a proof-of-concept trial
  - ▷ Used as a foundation for a customized eXtypes solution



# New Technology: Metadata Extraction

- ▶ Automatically identifies and marks up front-matter elements in unstructured Word files
  - ▷ Title
  - ▷ Authors
  - ▷ Affiliations
  - ▷ Abstract
- ▶ Integrated with Aries Editorial Manager (version 14.1) for enhanced automation during manuscript submission

# That's Only Four Document Elements How Hard Can It Be...?

# One Example of How Hard It Can Be

- ▶ Author names provide an interesting peek into the challenges of automation
- ▶ As a result of this work, we added support for all eXtyle customers for these (and many other) cases:
  - ▷ Author names with no space before the surname ("J.A.Smith")\*
  - ▷ Surnames with unusual capitalization ("Ijitsma" or "AchutaRao")
  - ▷ Authors with mixed-case given names and uppercase surnames ("Lo Min CHAN")

*\*The "frighteningly common" error*

# More Author Processing Improvements

- ▶ Added support for the feminine ordinal indicator in a name, as in "Ana M<sup>a</sup>" which is short for "Maria"
- ▶ Added limited support to mark names when they are in surname–comma–given-name order, e.g., "Smith, John David, MD"
- ▶ Added a comment warning when a four-part (or longer) author name is divided into one surname part and three or more given-name parts — e.g., "Clemson David Munoz Smith"

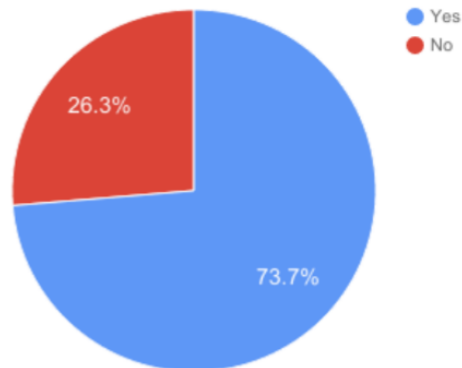
# Customer Workflows

# Workflow Survey

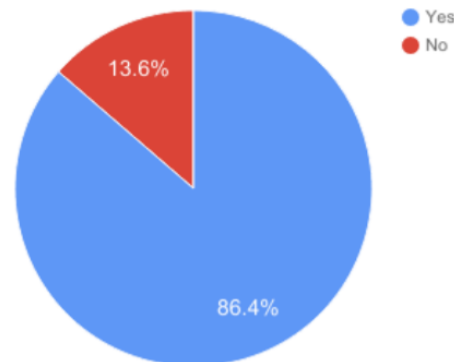
- ▶ If you haven't yet completed the [eXtyle Workflow Survey](#), please consider doing so
- ▶ 23 organizations have responded
- ▶ We hope to compile and release some results in the coming year and would love to collect more data first
- ▶ A few highlights from what we have so far...

# Workflow Survey Results

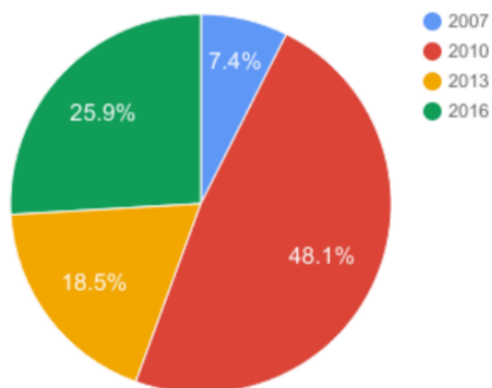
Do you use freelance copy editors?



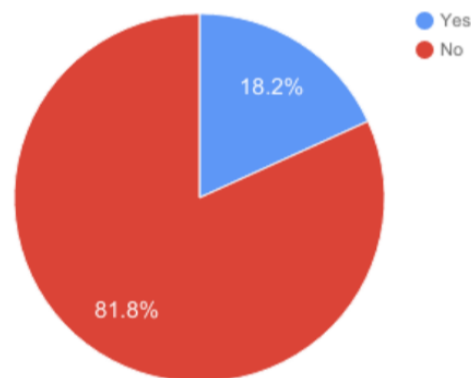
Do your freelance or contract copy editors work with documents that have been run through eXtyle?



Which version(s) of Word do you currently use?



Do you require authors to use an authoring template?



# XUG Breakout Tables

- ▶ Five tables with assigned topics
  - 1) eXtyles workflow discussions and questions
  - 2) What workflow changes are you considering in the next year?
  - 3) Customer suggestions for new eXtyles features
  - 4) Author metadata: ORCID, CRediT, and Funding Data
  - 5) MathType
- ▶ Sign-in sheet at each table
- ▶ Will announce the halfway point for customers who would like to switch tables



**Thank You and Stay Tuned  
for eXtyles Feature Demos!**