Welcome!

to the 11th Annual

eXtyles®
INERA INC

User Group Meeting

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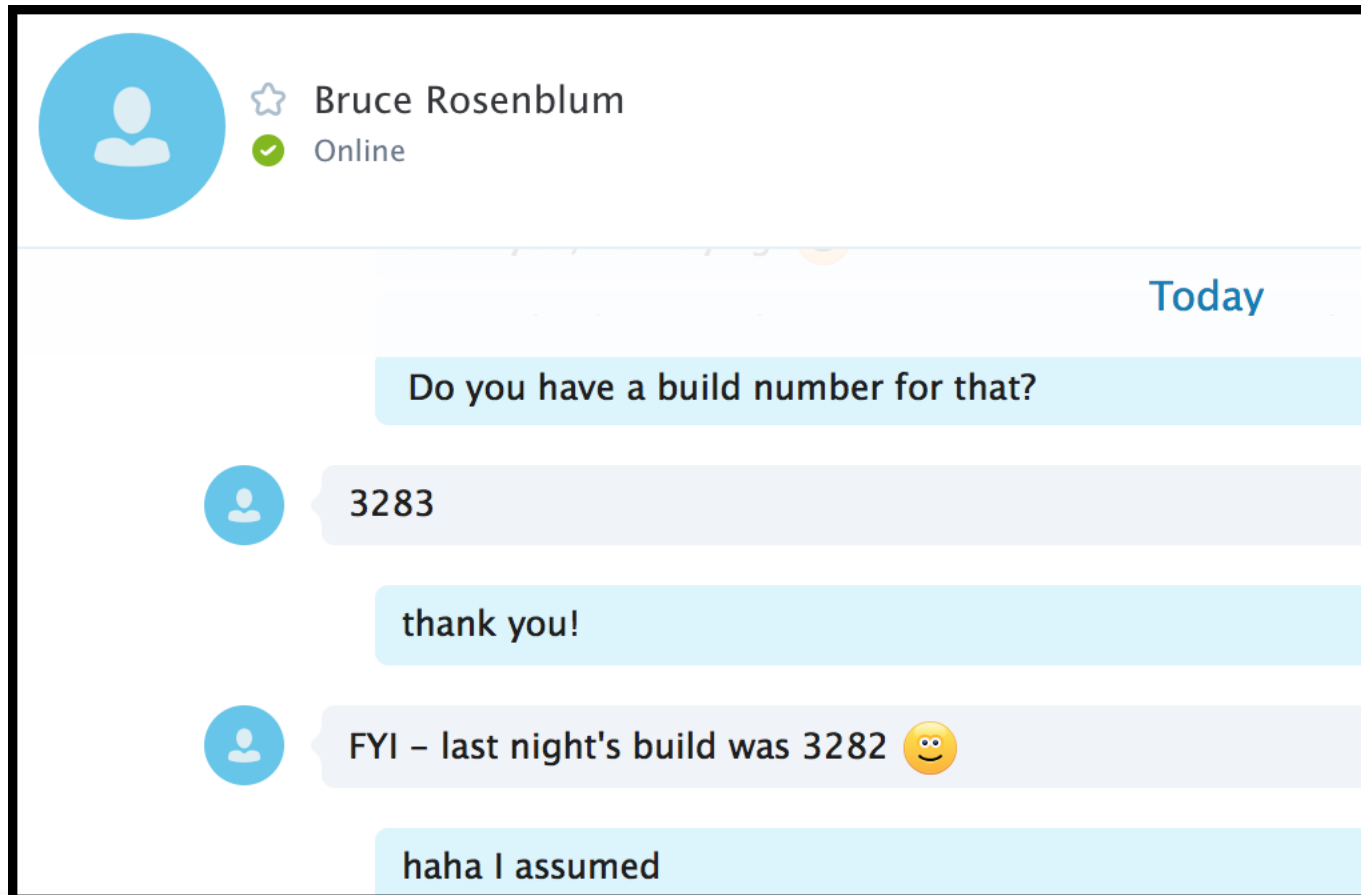# eXtyles New Features and Improvements

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A Few Days after XUG 2014

We had a meeting about the meeting

A Few Days before XUG 2015

So What Happened in the Intervening Months?

- New eXtyles features (plus some coming attractions!)
- Enhancements to key eXtyles features
- New and improved eXtyles troubleshooting tools
- Inera projects and developments

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New eXtyles Features

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Full Processing of "Live" Footnotes/Endnotes

- Inera has developed a suite of improvements for handling footnotes and endnotes

- Previously, eXtyles could only act on text in notes if they were "flattened" – that is, converted from linked Word notes to plain text

- eXtyles can now:
  - Convert flattened notes back to live notes
  - Act on text in live notes during Cleanup, Auto-Redact, and Advanced Processing

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Conversion of "Flat" Notes to Word Notes

Build
3131

Added a new feature, conversion of "flat" footnotes and endnotes to "live" footnotes and endnotes

- Currently resides in the Post-Processing Cleanup dialog
- Works only on notes with Arabic numerals

3153

- Also works with section-based notes, in which numbering re-starts at 1 in each unique section
- **We will demo this later today!**

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Processing Text within "Live" Notes

3147 • Added support for Advanced Processes to run on live Word footnotes and endnotes

3172 • Added support for Auto-Redact to run on live Word footnotes and endnotes

• The conversion from live → flattened → live notes happens "under the hood," and live notes can be preserved throughout the eXtyles process

• **We will demo this later today!**

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Activation: Rich Metadata Import

3283 Added support for "nested" XML metadata using the Document Information Metadata Import upgrade

- – An entire fragment of metadata, such as a JATS <funding-group> element, can be imported from a CMS and passed through to the XML export

- – Allows much better metadata handling of repeated structures when eXtyles doesn't know in advance how many there will be (such as funders)

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Coming Soon: ORCiD Auto-Reconciliation

- Uses the new nested-metadata import feature
- During eXtyles Author Processing, compares transmittal author data against text in Word document
  - Warns on discrepancies
  - Merges ORCiDs into author paragraph
- No copy/paste of ORCiDs required!
- **A key theme of the past few XUG meetings**
- **We will demo this later today!**

Coming Soon:
Journal Database Download in eXtyles UI

- **Requested at XUG 2014**

- The eXtyles journal database is regularly updated

- In the past year, the number of titles has jumped from 34,000 to nearly 42,000

- Download will be available from "About eXtyles" in the eXtyles menu

- **We will demo this later today!**

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Enhancements to Key eXtyles Features

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Activation

3203

- Improved processing of auto-numbered lists and headings

- Word auto-numbers are flattened "under the hood" and restored to headings as appropriate, according to template or configuration settings

- Better results in docs in which auto-numbered headings need to be preserved

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Cleanup

- The tool to exclude monospace fonts from some Cleanup functions (to preserve spaces in special types of text such as computer code) tended to slow down Cleanup, a problem exacerbated in Word 2013

3177
- A performance optimization was added so that this step will run only if monospace fonts are used in the document

Compare to Baseline

3231
- Added a check box to the dialog that allows the user to show formatting changes in the comparison file
- The dialog will now always appear, even if there is only one baseline file
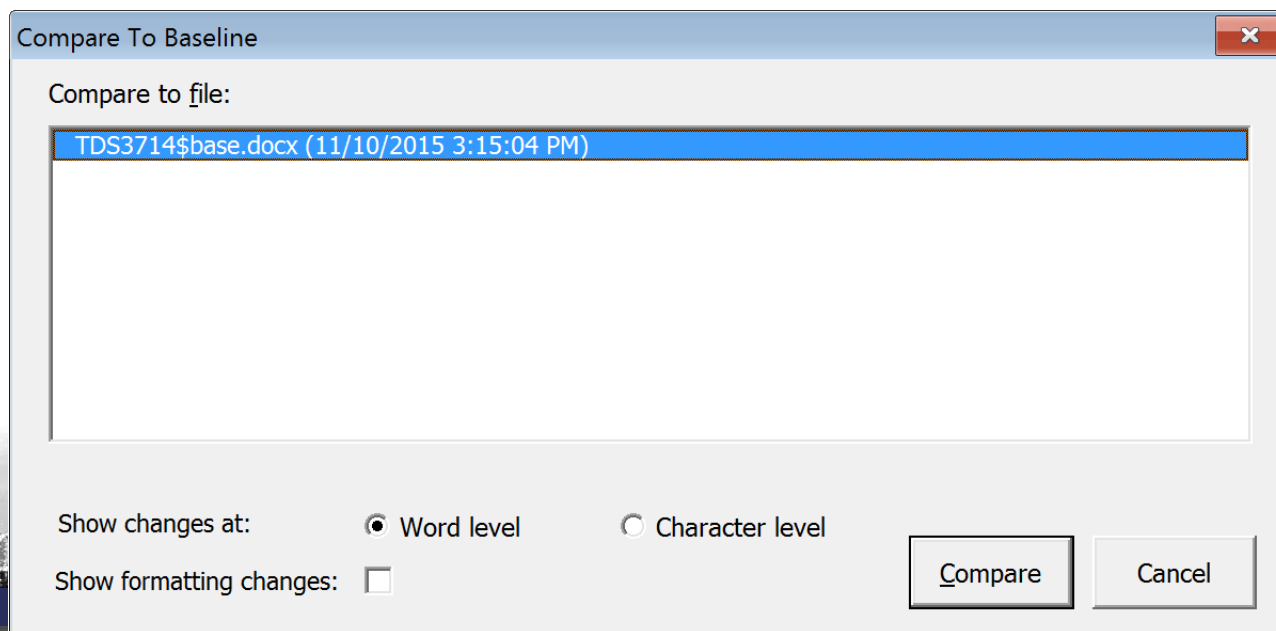
Reference Processing

3089
- Added controls for automatic cleanup of all single quote, double quote, and prime characters during reference restructuring

- Also added controls for cleaning up double hyphens, double hyphens between numbers, and single hyphens between numbers

- Configurable for each part of a reference (author names, article titles, book titles, etc.)

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Reference Processing

3065 • Added support for references that have PMIDs to have their tags removed and be reprocessed without needing to re-run PubMed Reference Linking/Correction

3183 • Added support to treat "Junior" or "Senior" (e.g., in "Munoz Junior, A.") as a generational indicator, not a surname part (note that PubMed often indexes such names incorrectly)

Reference Processing: Non-Journal References

3161
- Improved recognition of references to standards, now tagged with <std> (previously, standards were tagged as <other>)

3162
- Added support to identify book edition numbers like "5 ed." (without an ordinal suffix)

3157
- Added support for Portuguese masculine (º) and feminine (ª) ordinal indicators when used as part of an edition number in a book

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Reference Processing: Russian

3095 Added support for full processing of book references in Cyrillic

<bok>12. Федоров А.В., Рухленко И.Д., Баранов А.В., Кручинин С.Ю. Оптические свойства полупроводниковых квантовых точек. СПб.:Наука, 2011. 188 с.</bok>

<bok>13. Климов В.В. Наноплазмоника. М.: Физматлит, 2009. 480 с.</bok>

<bok>14. Розеншер Э., Винтер Б. Оптоэлектроника. М.: Техносфера, 2004. 592 с.</bok>

<bok>15. Зон Б.А., Манаков Н.Л., Рапопорт Л.П. Многофотонные процессы в атомах. М.: Атомиздат, 1978. 181 с.</bok>

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PubMed and CrossRef Linking

3065 • Added support to add PMCIDs during PubMed Reference Correction (note that these IDs are added in Word as plain text, not hyperlinks)

3190 • Fixed a problem in which "ePub ahead of print" or similar text was dropped during PubMed Reference Correction if the item was not yet paginated

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PubMed and CrossRef Linking

3094
- Updated the author name mismatch warning in PubMed and CrossRef Reference Correction to list the relevant name(s) (**requested at XUG 2014)**

3072
- For CrossRef Linking, "journal_article" publication date now takes precedence over "journal_issue" publication date; this change reduces the number of warnings about a year "mismatch"

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XML Export

3129 • Added support for "paragraph-wrapped" appendices
  – Allows use of Start and End "wrapping" paragraphs around appendices
  – Remaps those paragraphs into a wrapping <appendix> element with an ID in the XML
  – Allows any paragraph style to be used in an appendix

3111 • Added support to automatically add an ISO 8601 date attribute to the pub-date element

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XML Export: Funding

3092

- Added support for Highwire Press/PubMed Central funding markup model in JATS XML

- Different from the Atypon model (unfortunately, funding markup is not yet standardized across various platforms)

- Can be used to drive deposits of funding information to CrossRef

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XML Export: Figures and Tables

3166
- Added support to set position and orientation attributes of figures and tables using the eXtyles Insert Tag menu
  - Landscape tag
  - Anchor and float tags allow default position override

3277
- eXtyles can detect Word pages in landscape and automatically assign the table orientation attribute in the XML

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XML Export: Tables

3131

- Added support for width attribute to specify the entire width of a Word table (in a preferred unit of measure) and the cell widths as percentages of the total table width

3241

- Added a warning in export when a Word table has a malformed left edge; often these problems cannot be detected visually in the Word file

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New and Improved
eXtyles Troubleshooting Tools

eXtyles Installer

3203
- Upgraded all eXtyles installers from InstallShield 6.2.2 to InstallShield 2012

- Reminder: *always* use the Windows Add/Remove Programs tool to uninstall eXtyles to avoid corruption

3094
- Updated the installer process to more accurately detect Word on systems in which Word is installed in a non-standard location

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Diagnostic Tool

3234

- Added a utility to the eXtyles directory, eXdiagnoseEXE.exe, that can be used to help diagnose when a system may not be set up correctly to install or run eXtyles

- **We will demo this later today!**

More Troubleshooting Tools

3192
- Added better error reporting when eXtyles has trouble creating its working TEMP directory

3028
- Added a warning to the XML export alert when there is a MathType conversion error

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More Troubleshooting Tools

Have you ever seen the alert: "Recording Clipboard style sheet will require copying many styles. Do you want to use Normal style instead?"

- – Before, you could use Post-Processing Cleanup to remove unused styles after Activation

3190
- – Now, you can also remove unused styles during Activation

- – Triggered by holding down the Shift key when clicking OK in the Document Information dialog

- – Can sometimes help to activate an otherwise balky document with a huge number of styles

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Troubleshooting Documentation

- New *eXtyles Overview for IT Professionals*
- **Requested at XUG 2014**
- Available at
  http://www.inera.com/support/eXtyles-for-IT.pdf

Freshdesk Ticketing System

- New tool for managing support questions

- Queries and conversations are available to all eXtyles support team members

- Facilitates the identification of patterns, so the team can create more support FAQs for the website

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Support FAQ

- Searchable database

- http://support.extyles.com/support/home

Inera Projects and Developments

Edifix

- Many improvements, including additional reference templates (13 standard/common styles are now available)

- A number of eXtyles customers are also using Edifix to address different requirements

- www.edifix.com

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AMA
APA 5th ed.
APA 6th ed.
ASM Press (American Society for Microbiology)
Cell Press
Chicago (Author-Date)
Chicago (Bibliography)
CSE (Scientific Style and Format)
ICMJE (Citing Medicine/NLM)
ISO-690
MLA
RIS
SEG (Society of Exploration Geophysicists)
Spandidos Publications
(No Format)

Linking and Data Correction

☑ PubMed ⓘ   ☑ CrossRef ⓘ

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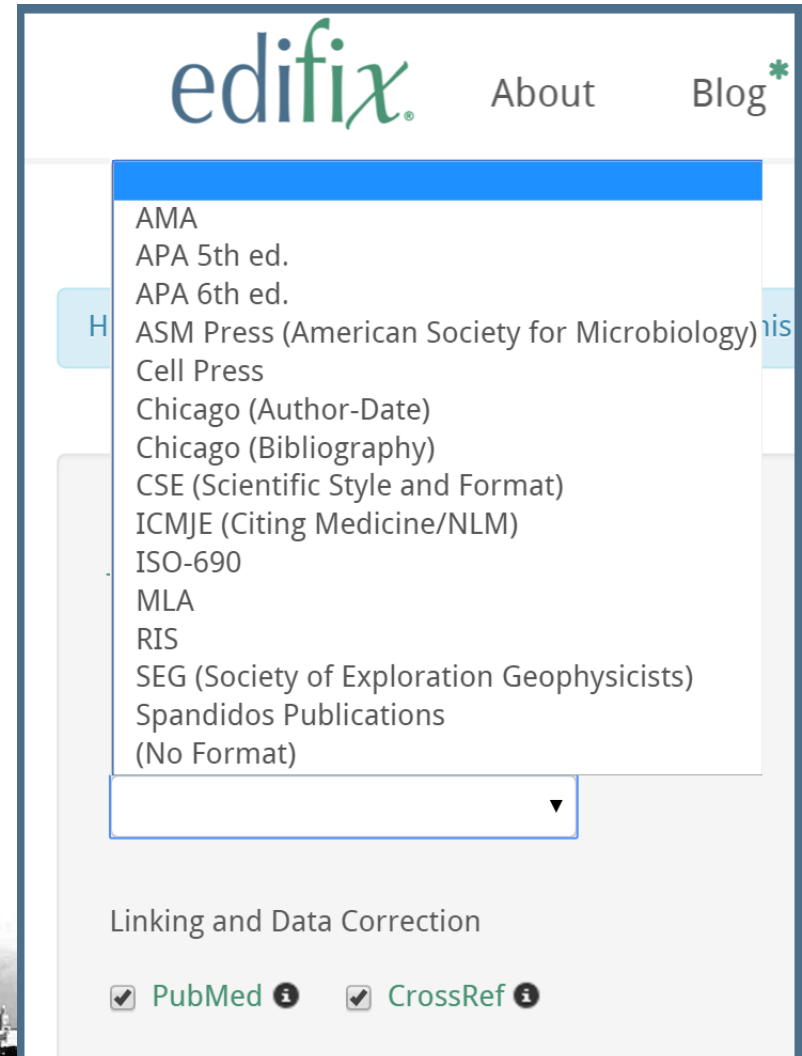
Standards

- Continued work with established and emerging publishing standards
  - JATS and BITS
  - STS
  - CrossRef
- eXtyles is a tool that addresses the real-world challenges of integrating standards into workflows
- Bruce will talk more about these topics during his Industry Updates

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- eXtyles and Word tips
- Links to important publishing resources
- News from industry events

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Thank You!

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