#XUG2016

INERA INC

eXtyles®

User Group Meeting 2016

What's New?

Elizabeth Blake, Director of Business Development

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The Year in Review

- From XUG 2015 to XUG 2016
- A few Inera highlights
- No ~~man~~ software is an island
- If everyone is special, no one is special: eXtyles and publishing standards
- New workflow requirements, new eXtyles solutions

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From XUG 2015 to XUG 2016

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XUG 2015: Inera Review

- Every year, we have a team meeting to discuss our impressions of XUG and review the customer feedback
- A persistent theme appeared in the staff meeting notes and customer feedback forms from XUG 2015

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XUG 2015: Customer Feedback

It would be great to see more **workflow** examples from other publishers

A panel or time set aside for a discussion of **workflow**? …Seems to be of interest to share and compare

Perhaps more **workflow** process discussions

Perhaps a session on **workflows** to see what other people are doing & maybe establish some best practices!

User demos of their **workflows**

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XUG 2016 Theme: Electronic Publishing Workflows

- Customer presentations
- Topics for breakout table discussions
- A focus on eXtyles in context

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A Few Inera Highlights

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The United States of America

The Director of the United States Patent and Trademark Office

Has received an application for a patent for a new and useful invention. The title and description of the invention are enclosed. The requirements of law have been complied with, and it has been determined that a patent on the invention shall be granted under the law.

Therefore, this

United States Patent

Grants to the person(s) having title to this patent the right to exclude others from making, using, offering for sale, or selling the invention throughout the United States of America or importing the invention into the United States of America, and if the invention is a process, of the right to exclude others from using, offering for sale or selling throughout the United States of America, or importing into the United States of America, products made by that process, for the term set forth in 35 U.S.C. 154(a)(2) or (c)(1), subject to the payment of maintenance fees as provided by 35 U.S.C. 41(b). See the Maintenance Fee Notice on the inside of the cover.

Michelle K. Lee

Director of the United States Patent and Trademark Office

U.S. Patent No. 9,430,451

- *Issue Date:* August 30, 2016
- *Title:* Parsing Author Name Groups In Non-Standardized Format
- *Inventors:* Igor Kleshchevich, Bruce D. Rosenblum, and Irina Golfman

(12) **United States Patent**
Kleshchevich et al.

(10) **Patent No.: US 9,430,451 B1**
(45) **Date of Patent: Aug. 30, 2016**

(54) **PARSING AUTHOR NAME GROUPS IN NON-STANDARDIZED FORMAT**

(71) Applicant: **Inera, Inc.**, Belmont, MA (US)

(72) Inventors: **Igor Kleshchevich**, Boston, MA (US); **Bruce D. Rosenblum**, Belmont, MA (US); **Irina Golfman**, Belmont, MA (US)

(73) Assignee: **Inera, Inc.**, Belmont, MA (US)

(*) Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 0 days.

(21) Appl. No.: **14/676,664**

(22) Filed: **Apr. 1, 2015**

(51) **Int. Cl.**
G06F 17/20 (2006.01)
G06F 17/21 (2006.01)
(Continued)

(52) **U.S. Cl.**
CPC ***G06F 17/218*** (2013.01); ***G06F 17/2276*** (2013.01); ***G06F 17/2294*** (2013.01); ***G06F 17/2705*** (2013.01)

(58) **Field of Classification Search**
CPC G06F 21/6227; G06F 2221/2107; G06F 17/211; G06F 17/24; G06F 17/28; G06F 17/30011; G06F 17/2247; G06Q 50/182; G09C 5/00; H04L 63/0428
USPC 704/1; 707/722, 737; 1/1; 705/14.72; 715/234, 256
See application file for complete search history.

(56) **References Cited**

U.S. PATENT DOCUMENTS

7,028,259 B1 4/2006 Jacobson
7,251,777 B1 7/2007 Valtchev et al.
7,689,557 B2 3/2010 Pandit et al.
(Continued)

FOREIGN PATENT DOCUMENTS

CN 103412852 11/2013
JP H0290360 3/1990
(Continued)

OTHER PUBLICATIONS

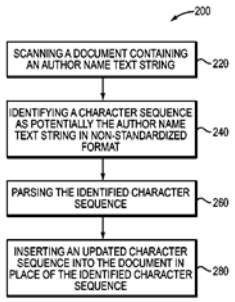
Name Object Reference Guide, by Melissa Data Corporation, 2013, pp. 1-50; http://www.melissadata.com/nameobject/nameobject.htm.
(Continued)

Primary Examiner — Charlotte M Baker
(74) *Attorney, Agent, or Firm* — Hamilton, Brook, Smith & Reynolds, P.C.

(57) **ABSTRACT**

The present invention is directed to a method and corresponding system for parsing author name text strings in documents. The method and system may electronically scan a document that contains an author name text string comprising a set of initials, one or more author surnames, and punctuation. The author name text string may be in non-standardized format. The method and system may identify a character sequence in the document as potentially being the author name test string based on (i) a sequence of title-case words, capital letter, and punctuation, and (ii) the character sequence ending with a recognized indicator. The method and system may parse the identified character sequence by converting any punctuation and whitespace between terms in the character sequence to a single space character, identifying a pattern of surname and set of initials comprising each author name contained in the character sequence, and marking up the components of surname and set of initials comprising each author name. The method and system may use the marked up character sequence to identify and correct errors in punctuation and capitalization in the character sequence, and output an updated character sequence in standardized format.

22 Claims, 6 Drawing Sheets



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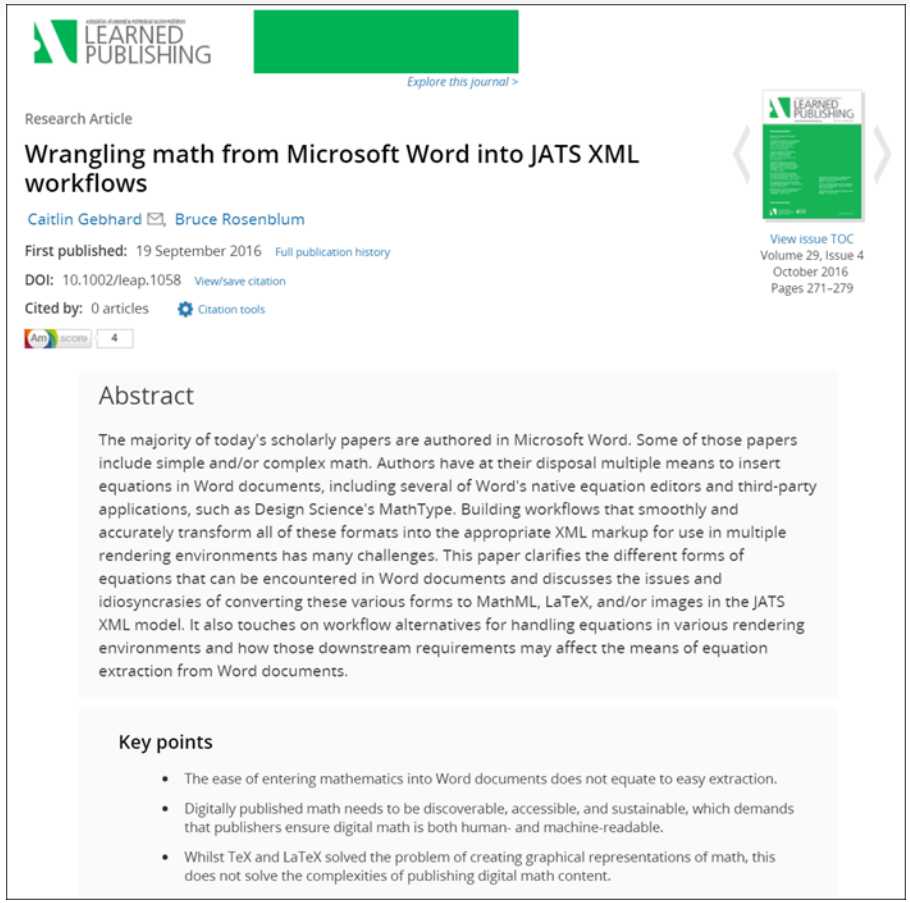
<jrn>Gebhard, Caitlin, and Bruce Rosenblum. "Wrangling math from Microsoft Word into JATS XML workflows." *Learned Publishing* 29, no. 4 (2016): 271–9. http://dx.doi.org/10.1002/leap.1058</jrn>



LEARNED PUBLISHING

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Research Article

Wrangling math from Microsoft Word into JATS XML workflows

Caitlin Gebhard, Bruce Rosenblum

First published: 19 September 2016 Full publication history

DOI: 10.1002/leap.1058 View/save citation

Cited by: 0 articles Citation tools

View issue TOC
Volume 29, Issue 4
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Pages 271–279

Abstract

The majority of today's scholarly papers are authored in Microsoft Word. Some of those papers include simple and/or complex math. Authors have at their disposal multiple means to insert equations in Word documents, including several of Word's native equation editors and third-party applications, such as Design Science's MathType. Building workflows that smoothly and accurately transform all of these formats into the appropriate XML markup for use in multiple rendering environments has many challenges. This paper clarifies the different forms of equations that can be encountered in Word documents and discusses the issues and idiosyncrasies of converting these various forms to MathML, LaTeX, and/or images in the JATS XML model. It also touches on workflow alternatives for handling equations in various rendering environments and how those downstream requirements may affect the means of equation extraction from Word documents.

Key points

- The ease of entering mathematics into Word documents does not equate to easy extraction.
- Digitally published math needs to be discoverable, accessible, and sustainable, which demands that publishers ensure digital math is both human- and machine-readable.
- Whilst TeX and LaTeX solved the problem of creating graphical representations of math, this does not solve the complexities of publishing digital math content.

Originally presented at JATS-Con 2016 (https://www.ncbi.nlm.nih.gov/books/NBK350572/)

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No Software Is an Island

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Play Nice, Kids

- Inera prides itself on being a collaborative organization (we even won an award!)
- eXtyles, too, is collaborative
  - Add-in to Microsoft Word
  - Links to PubMed, Crossref, etc.
- As in all relationships, sometimes there are conflicts
- If you've ever wondered what your support fees are paying for…

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Microsoft Office Update

- October 2016 Office update: Microsoft introduced a bug that caused eXtyles to fail
- The most significant impact on eXtyles of any Microsoft update in 17 years
- A very serious and frustrating situation for customers and for Inera
- The silver lining:
  - Microsoft was more responsive than they have ever been and addressed the problem in a matter of days; the fix is in the November 8 Office patches
  - We were able to figure out a workaround within a few days so eXtyles customers could keep working
  - We developed a more comprehensive QA protocol for future updates

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NCBI HTTPS

- You may have received one or two emails from us on this topic in the past few months…
- The result of a US Government mandate to move all web services to secure sites by year end
- Inera was thus given a mandate by NCBI to change all web-based interactions between eXtyles/Edifix and all NCBI services to the HTTPS protocol
  - PubMed Linking and Correction
  - NCBI Database Linking (GenBank, PDB, etc.)
  - PubMed Metadata Deposit
  - Validation of JATS XML against NCBI-hosted version of the DTD

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New Crossref Guidelines

- Another security-driven decision (with some branding considerations thrown in)
- Drops "dx" from DOI links and uses "https:" rather than "http:" (e.g., https://doi.org/10.1629/22161)
- Crossref is requesting adoption by March 2017
- eXtyles will be compliant with the security request by the end of 2016
  - Will query Crossref using HTTPS
  - Underlying link in Word file (regardless of display format) will be HTTPS
- Link display format is the eXtyles customer's choice

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eXtyles and Publishing Standards

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Standardized Solutions

- eXtyles NLM
  - Released in 2008 as an "off-the-shelf" configuration of eXtyles for journal publishers whose primary goal was submission of XML to PubMed Central
  - Very limited customization options
  - Simplified pricing
  - Licensed by both small and large publishers
  - Had JATS 1.1 support integrated into eXtyles NLM as soon as the standard was official

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The JATS Family: JATS, BITS, and STS

- New eXtyles customers, document types, and XML requirements
- BITS XML for submission of technical reports and monographs to NCBI Bookshelf
- NISO STS for standards publications (in committee review and available for public comment early next year before a formal vote)
- Present opportunities for potential new standardized eXtyles solutions

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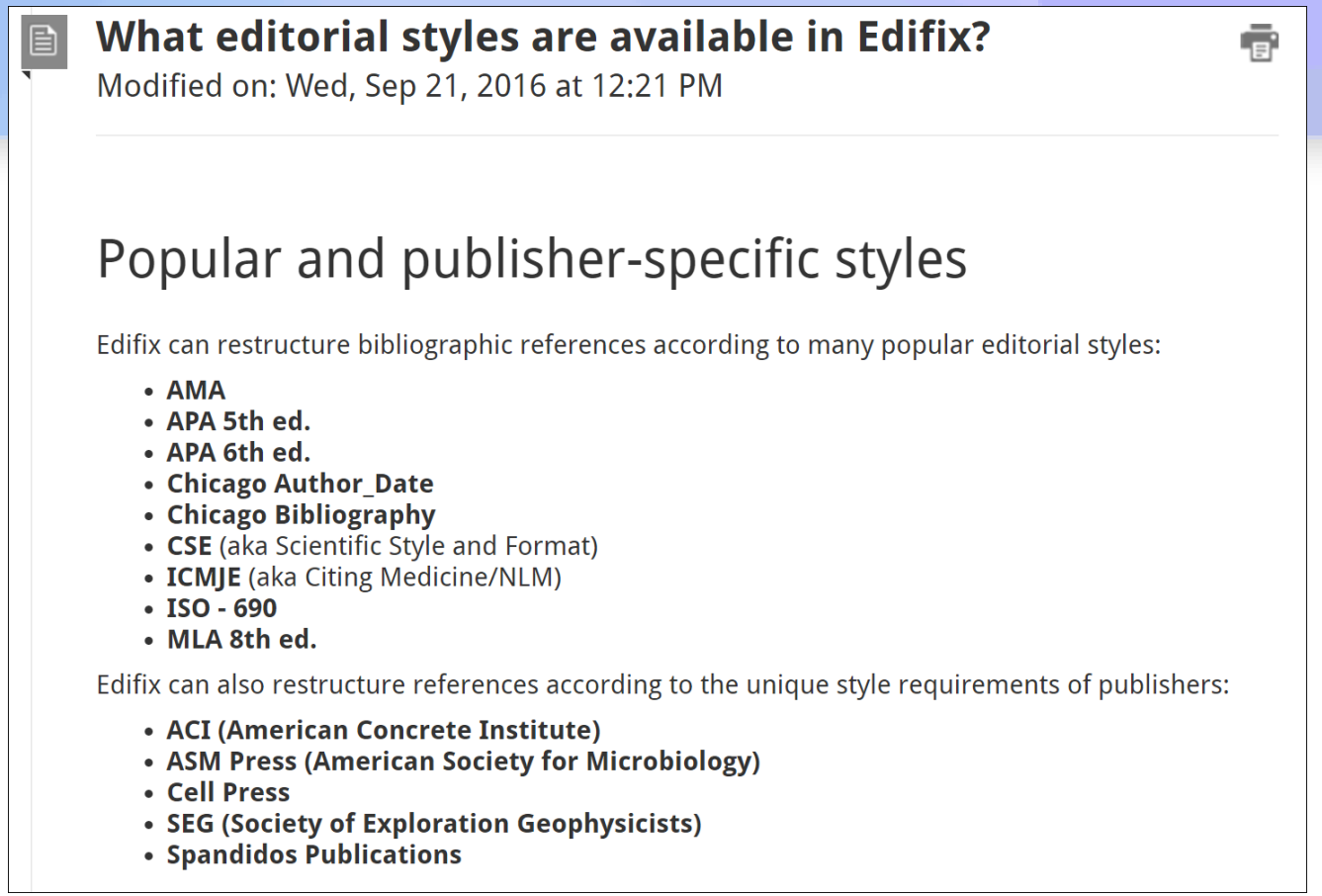

What editorial styles are available in Edifix?

Modified on: Wed, Sep 21, 2016 at 12:21 PM

Popular and publisher-specific styles

Edifix can restructure bibliographic references according to many popular editorial styles:

- **AMA**
- **APA 5th ed.**
- **APA 6th ed.**
- **Chicago Author_Date**
- **Chicago Bibliography**
- **CSE** (aka Scientific Style and Format)
- **ICMJE** (aka Citing Medicine/NLM)
- **ISO - 690**
- **MLA 8th ed.**

Edifix can also restructure references according to the unique style requirements of publishers:

- **ACI (American Concrete Institute)**
- **ASM Press (American Society for Microbiology)**
- **Cell Press**
- **SEG (Society of Exploration Geophysicists)**
- **Spandidos Publications**

- Subscription-based web service for references
- Supports many standard editorial styles (custom styles are available)

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New Workflow Requirements, New eXtyles Solutions

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Research in Emergencies

Sent: 02 February 2016 16:51

To: Bruce ROSENBLUM (bruce@inera.com)

Subject: Questions: data sharing protocols for emergencies

Hi Bruce,

We're trying to figure out how to publish pre-accepted journal articles on the Bulletin website with a unique identifier!

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Research in Emergencies

- Initiated a fast-paced conversation among Inera, WHO, and Crossref
- Added Research in Emergencies as an article type to the WHO configuration
- Added Ebola and Zika as secondary article types
- Added support for preprint publication dates in the article history line, e.g., "Preprint Published Online July 4, 2003"

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Research in Emergencies

- With Zika, WHO took advantage of an ICMJE waiver regarding data sharing in emergencies that was a direct response to Ebola
- Editor decides if research needs to be made publicly available before peer review
- At least one of these WHO papers has now been peer-reviewed, accepted, and published
- About 70% of the scholarly articles cited in news stories about Zika were published using eXtyles

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Discussion of ICMJE protocol

Bulletin of the World Health Organization

Zika Open

These papers are posted in the context of the Public Health Emergency of International Concern declared by the Director-General of the World Health Organization 1 February 2016.

The data in these papers are freely available for unrestricted use, distribution and reproduction in any medium, provided that the original work is properly cited as indicated by the Creative Commons Attribution 3.0 Intergovernmental Organizations license (CC BY IGO 3.0).

If you wish to submit a manuscript, please do so via our online tracking system.

EDITORIAL

Data sharing in public health emergencies: a call to researchers
- Christopher Dye, Kidist Bartolomeos, Vasee Moorthy, Marie Paule Kieny
Posted: 4 February 2016

http://dx.doi.org/10.2471/BLT.16.170860 Article [HTML]

http://www.who.int/bulletin/online_first/zika_open/en/

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Zika Coverage

- The Guardian:
  - https://www.theguardian.com/media-network/2016/apr/06/zika-open-data-sharing-initiative-world-health-organisation
- Nature News:
  - http://www.nature.com/news/zika-and-birth-defects-what-we-know-and-what-we-don-t-1.19596
  - (All six cited articles published with eXtyles)

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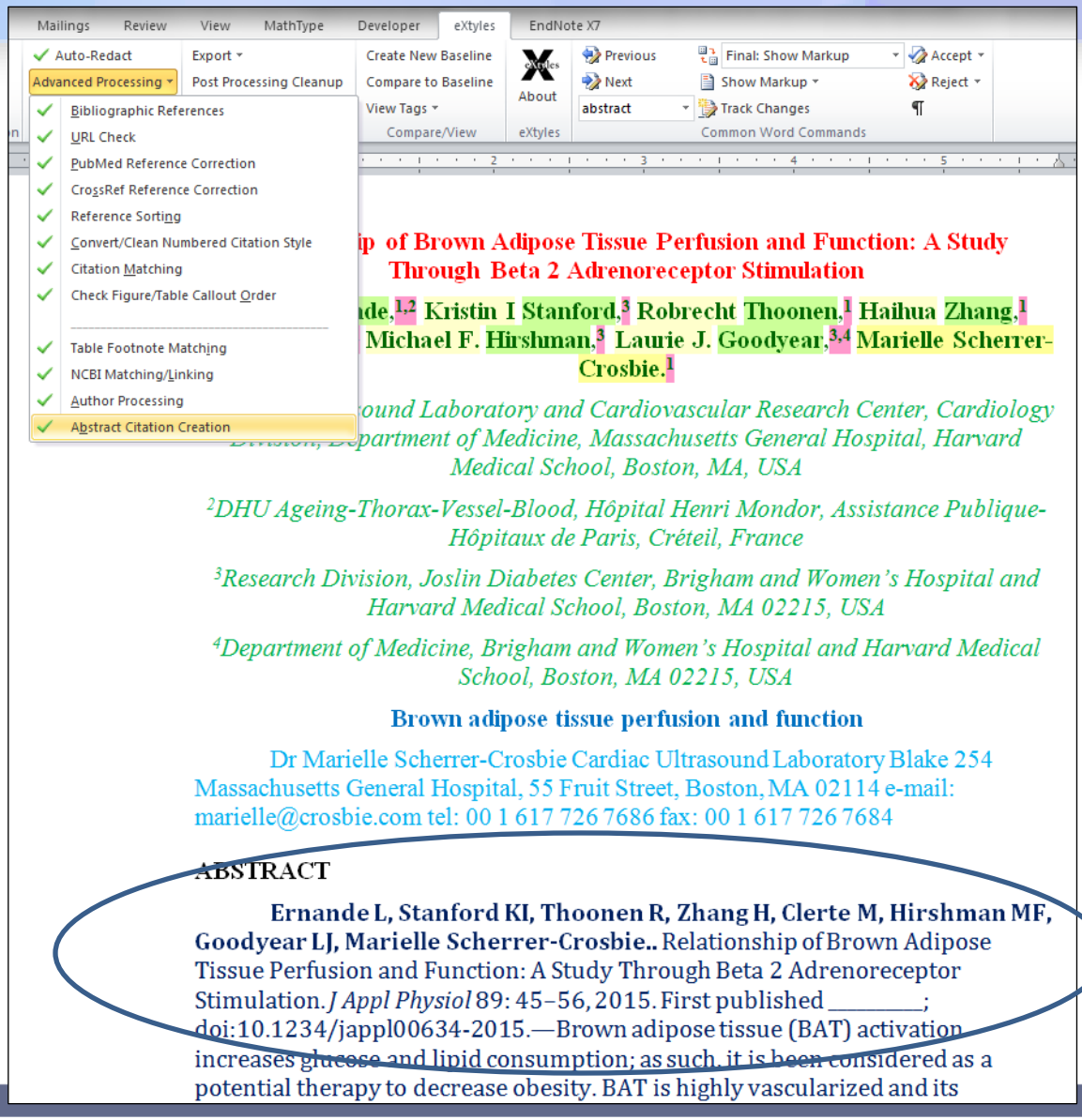
Recommended Citation Tool

- eXtyles process built for the American Physiological Society
- Replaced a macro they used in their previous workflow



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… Later Today

- A more detailed overview of recent eXtyles innovations and improvements
- A new eXtyles feature (still in beta) that has some very interesting editorial applications
- Live demos of a few of these new tools

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XUG 2016: Workflow Breakout Table Topics

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How Tables Will Work

- Each table will be moderated by an Inera staff member who will take notes
- Our goal is to facilitate discussion, not direct it
- We'll indicate the halfway point for table switching, but you're not obligated to stick to that schedule or change tables
- If you know you have hard-earned wisdom to impart on a given topic, please consider stopping by that table ☺

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Table Topics: Show of Hands

- Coordinating authors, copy editors, and freelancers in an eXtyles workflow
- Managing your eXtyles configuration: best practices for eXtyles administrators
- Customer suggestions for new eXtyles features
- Author metadata: ORCID, CRedIT, and Funding Data (formerly known as FundRef)
- What workflow changes are you planning in the next year? (aka “Am I nuts to be trying this?”)
- Schematron rules for use on eXtyles XML files

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Thank You!

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