## **Model Refinement**

The Phenix Project

#### Lawrence Berkeley Laboratory

**BERKELEY LAB** 



### Solving structure by crystallography



- Process is not as 'linear' as shown
- Each step has numerous sub-steps
- Crystals may not grow or exhibit pathologies
- Stuck solving phase problem

## **Model refinement**



## Not all model-to-data fitting is refinement



- Docking, flexible fitting, morphing are *not* refinement
- Refinement is to fine-tune an already fine atomic model
  - Refinement does only small changes to the model (within convergence radius of refinement, ~ 1Å)

### Solving structure in the past

- Familiar with many software packages (often with "orthogonal" philosophies)
- Mutually incompatible file formats for common data exchange
- Coding experience was a must (typically using arcane languages FORTRAN or C)
- No GUIs. Command line expertise (Unix)
- Reading thick books (no Google, YouTube or ChatGPT!)
- Limited online forums
- Don't expect your questions answered quickly by email
- Slow computers (with sometimes limited access)

### Solving structure in the past

- From many months to years
  - Spend days on graphics (manual atomic model building)
  - Run computations overnight





Solving my first structure back in 1997





- Does it always work?
- Is it always as easy as poor model in, better model out?

- No. Because:
  - Refinement parameterization isn't easy (next slide)
  - Default settings suit most common scenario
    - Typical resolution data, model reasonably fits data
  - Less typical situations need customizations
    - Low or high resolution data
    - Incomplete models
    - Final models
    - AlphaFold predicted models
    - Novel ligands

| Model refine       | ment: lot of s | tuff to know…         |
|--------------------|----------------|-----------------------|
| Reference model?   | TLS?           | Rotamer fixing?       |
| Reference model:   | Al             | tLocs?                |
| ADP? Group B v     | s individual?  | Local minima?         |
| tNCS? Clashe       | es?            | NCS? IAS?             |
| Weights? CDL?      |                | SA? Grid search?      |
| Minimization?      |                | Rama plot restraints? |
| f' & f"? Hydrogens | ? Restraints?  | Bulk-Solvent?         |
| Rigid body?        | Rama-Z?        | Anisotropy?           |
| NQH flips?         | SS restraints? | Twinning?             |

- What to do when the 'black box' does not work?
  - Your decision-making is needed (and it is not always easy!)

## Model refinement: decision-making variables

- Crystal
  - Disorder
  - Twining, tNCS
  - Solvent content
  - Symmetry

- Data
  - Resolution
  - Errors
  - Completeness
  - Processing

- Model
  - Stage
  - Source
  - Parameterization
  - Fit to data

## How you know...

- ... refinement worked ?
- ... you did it correctly ?
- ... the model is good enough to publish ?

## How you know...

- ... refinement worked ?
- ... you did it correctly ?
- ... the model you got is good enough to publish ?

• Do validation!

Standard validation protocols are designed to answer these questions

### **Refinement: a closer look**

## **Model refinement**



Refinement – optimization process of fitting model parameters to experimental data

### **Model refinement**



**Crystal structure model** 

PDB code: 1QUB



Crystal model:  $\rho_{crystal} = \rho_{atoms} + \rho_{bulk solvent}$ 

### **Atomic model**



### Atomic model: disorder



### Atomic model: disorder



### **Refinement target function (score)**



## Model refinement target (score)



$$\sum_{hkl} (F_{obs} - F_{model})^2$$

$$\sum_{hkl} \frac{||F_{obs}| - |F_{model}||}{|F_{obs}|}$$

Maximum-Likelihood

### **Restraints and data resolution**



### Model refinement with vs no restraints: high resolution



Using restraints

No restraints

### Model refinement with vs no restraints: low resolution



#### Using restraints

No restraints

### Model refinement with insufficient restraints

- Refinement of a perfect  $\alpha$ -helix into low-res map
  - Using simplistic (standard) restraints on covalent geometry
    - Model geometry deteriorates as result of refinement





### NCS (internal symmetry): constraints vs restraints





Source: Internet

- **Constraints**: molecules 1, 2 and 3 are required to be identical
- **Restraints**: molecules 1, 2 and 3 are required to be similar but not necessarily identical

### Refinement



### **Choices of optimization method**

- Gradient-based minimization
- Simulated annealing
- Grid (systematic) searches
- Manual using molecular graphics programs (Coot, Chimera,...

### Choice of refinement method and refinement convergence





### **Real-space grid search**



Beyond convergence radius of minimization Beyond convergence radius of minimization and SA

### Phenix tools for model refinement

## Refinement

### Crystallography



Available since 2005

**Experimental** A priori Initial model knowledge data **Score** Modify model parameters Improved model phenix.real\_space\_refine Available since 2013

**Cryo-EM** 

### **Refinement protocol**



### **Refinement: practical considerations**

### **Use Hydrogen atoms**

- Half of the atoms in a protein molecule
- Make most interatomic contacts
- Add to model towards the end, data resolution does not matter
- Once added, do not remove before the PDB deposition
- H do contribute to R-factors (expect 0.1-2% drop in R)



A structure without (left) and with (right) hydrogen atoms

## **Use Hydrogen atoms**

- N/Q/H flips (asparagine/glutamine/histidine)
  - Based on clash analysis
  - Requires H present



## **Use Hydrogen atoms**

- N/Q/H flips
  - Based on clash analysis
  - Requires H present



### Know when to stop



Colored bars are histograms showing distribution of values for structures at similar resolution

The black polygon shows where the statistics for the user's structure fall in each histogram

#### Crystallographic model quality at a glance.

L.Urzhumtseva, P.V.Afonine, P.D.Adams & A.Urzhumtsev. Acta Cryst. D65, 297-

300 (2009)

### Know when to stop

### Likely overall good model



### **Clearly there are problems**



### Local vs Global

• R<sub>WORK</sub>/R<sub>FREE</sub>, bond/angle RMSDs etc do not report on local errors



### Map and model errors



Reasons for +ve/-ve density:

- Suboptimal xyz, occupancy, ADP, anomalous f' & f", charge
- Refinement has not reached convergence
- Wrong atom (ion)
- Suboptimal ADP (B-factor) type: isotropic vs anisotropic
- NEW phenix.oat is the new tool to help with this

### Not all modeling errors can be fixed by refinement



## Low resolution (3Å or worse)

- Use:
  - Ramachandran plot restraints
  - Secondary structure restraints
  - Reference model restraints (if quality homology model is available)
  - NCS (restraints or constraints)

## **Aggressive optimization methods**

- Simulated annealing (SA)
- Model morphing
  - Only use if model has gross errors (correction requires large movements)
  - Do not use if model is relatively good and only needs small corrections

- Likely need at about 3Å and worse
- Better than 3Å: use if needed (preserve good initial model from deterioration)
- Check Ramachandran plot regularly
- Don't use to fix outliers. Fix outliers first (manually), then use Ramachandran plot restraints to stop re-occurring outliers



Bad idea to use Ramachandran plot restraints in this case. Fix outliers first!

- Ramachandran plot restraints
  - Use to stop outliers from occurring



### After refinement (No Ramachandran plot restraints)



• What is wrong with this plot?



• It is very different from what we expect!



### How you can tell good vs bad plot?



0



### **Ramachandran plot Z-score**



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# Objectively judging the quality of a protein structure from a Ramachandran plot

Rob W.W.Hooft, Chris Sander and Gerrit Vriend

- Good at spotting odd plots
- One number, simple criteria:
  - Poor: |Z| > 3 Suspicious: 2 < |Z| < 3 Good: |Z| < 2



### Model validation: Ramachandran plot Z-score



### An outlier ≠ wrong





• All outliers need to be explained (supported by the data)

## **Refinement success is function of data quality**

• Do validation





### Validation tools in Phenix

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| demos       Jan 27 2020 10:57 3          ion_channel_den       Jan 27 2020 10:03 2          malcolm       Jan 22 2020 10:22 14       0.1748         real-space-refin       Jan 16 2020 04:28 3          3NIR       Dec 05 2019 10:2 1          leighton       Sep 02 2019 05:1 2          5pti       Aug 27 2019 03:4 3 <b>Calculate CC*</b> Comparison of unmerged data quality with refined model, as described in Karplus & Diederichs (2012) <b>EMRRinger</b> Model validation for de novo electron microscopy structures         Ligands  | 10101                  | Jan 27 2020 12:38      | 2              | (            | and hour quality assessment, including real space conclution, for eryo Elis structures  |
| ion_channel_den Jan 27 2020 10:03 2<br>malcolm Jan 22 2020 10:22 14 0.1748<br>real-space-refin Jan 16 2020 04:28 3<br>3NIR Dec 05 2019 10:2 1<br>leighton Sep 02 2019 05:1 2<br>5pti Aug 27 2019 03:4 3<br>EMRinger<br>Model validation for de novo electron microscopy structures<br><b>EMRinger</b><br>Model validation for de novo electron microscopy structures<br>Ligands<br>PHENIX version dev-svn-000 → Project: ChrisF  | demos                  | Jan 27 2020 10:57      | 3              |              | Structure comparison  |
| maccom Jan 22 2020 10.22 14 0.1748   real-space-refin Jan 16 2020 04:28 3   3NIR Dec 05 2019 10:2 1   leighton Sep 02 2019 05:1 2   5pti Aug 27 2019 03:4 3   EMRinger<br>Model validation for de novo electron microscopy structures Ligands  | ion_cnannel_den        | . Jan 27 2020 10:03    | 2              |              | Identify differences between multiple structures of the same protein using multiple criteria  |
| real-space-refin Jan 16 2020 04:28 3   3NIR Dec 05 2019 10:2 1   leighton Sep 02 2019 05:1 2   5pti Aug 27 2019 03:4 3   EMRinger<br>Model validation for de novo electron microscopy structures<br>Ligands   PHENIX version dev-svn-000 Project: ChrisF   | maicoim                | Jan 22 2020 10:22      | 14             | 0.1748       |   |
| SNIR Dec 05 2019 10:2 1   leighton Sep 02 2019 05:1 2   5pti Aug 27 2019 03:4 3 <i>EMRinger</i> Model validation for de novo electron microscopy structures   Ligands   PHENIX version dev-svn-000 Project: ChrisF   | real-space-refin       | . Jan 16 2020 04:28    | 3              |              | Colevlate CC*   |
| Sep 02 2019 05.1 2          5pti       Aug 27 2019 03:4 3         Gurrent directory:       /Users/pafonine/Desktop/all/people/ChrisF         Browse         PHENIX version dev-svn-000   | JNIK                   | Dec 05 2019 10:2       | 1              |              | Comparison of unmerged data quality with refined model, as described in Karplus & Diederichs  |
| Spti       Aug 27 2019 03:4 3  | leighton               | Sep 02 2019 05:1       | 2              |              | (2012)  |
| EMRINGEr       Model validation for de novo electron microscopy structures         Ligands         Current directory:       /Users/pafonine/Desktop/all/people/ChrisF       Browse       Project: ChrisF   | 501                    | Aug 27 2019 03:4       | 3              |              | Ma EMDinger   |
| Ligands       Current directory:     /Users/pafonine/Desktop/all/people/ChrisF       PHENIX version dev-svn-000     Project: ChrisF  |                        |                        |                |              | Model validation for de novo electron microscopy structures   |
| Current directory:     /Users/pafonine/Desktop/all/people/ChrisF     Browse     Current       PHENIX version dev-svn-000     Project: ChrisF   |                        |                        |                |              | Ligands   |
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|  | PHENIX version dev-svr | 1-000                  |                |              | Project: ChrisF   |

## **Xtriage: all about your diffraction data**

- Matthews coefficient probabilities
- Completeness by resolution
- Wilson plot sanity
- Detection of translational NCS (tNCS)
- Analysis of systematic absences and combination of tNCS with current space group
- Anomalous signal from measurability analysis
- Symmetry and twinning analyses
- Alternative point-group symmetry (can be detected on the basis of an Rvalue analyses)

## Xtriage

| •••           |              |                                     |                                   |   | Xtriage (F           | Project: porin-twin)    |                                       |
|---------------|--------------|-------------------------------------|-----------------------------------|---|----------------------|-------------------------|---------------------------------------|
| ×             | 2            | - (B)                               | 8                                 |   | alla.                |                         |                                       |
| Preferences   | Help         | Run                                 | Abort                             | View log  | Save graph           | Ask for help            |                                       |
| Configure     | Xtriage_1    |                                     |                                   |   |                      |                         |                                       |
| Run status    | Results      |                                     |                                   |   |                      |                         |                                       |
|               |              |                                     |                                   | Xtriage sum   | mary                 |                         |                                       |
| Inter<br>twin | operators s  | ics sugge<br>show a si<br>CS does r | est twinn<br>gnifican<br>not appe | ing (intensities<br>t twin fraction.<br>ar to be preser | are significan<br>t. | tly different from expe | cted for normal data) and one or more |
| lce r         | ings do not  | appear t                            | o be pre                          | esent.  |                      |                         |                                       |
| The           | fraction of  | outliers i                          | n the da                          | ta is less than (                                       | 0.1%.                |                         |                                       |
| The           | data are no  | t signific                          | antly an                          | isotropic.  |                      |                         |                                       |
| The           | resolution o | cutoff app                          | pears to                          | be similar in al  | l directions.        |                         |                                       |
| The           | overall com  | pletenes                            | s in low                          | -resolution she   | lls is at least 9    | 0%.                     |                                       |
| Over          | rall complet | eness is                            | above 9                           | 0%.   |                      |                         |                                       |

## **PDB deposition**

|                          |                          |              |               | Pheni  | enix home  |
|--------------------------|--------------------------|--------------|---------------|--------|--|
| Quit Preferences He      | elp Citations Reload     | al last job  | ChimeraX Coot | PyM0   | KING Tools Help Server                               |
| Actions Job history      |                          |              |               |        |  |
| Projects                 |                          |              |               |        | maps (create, manipulate, compare)                   |
| Show group: All gr       | oups                     |              |               |        | Enhanced maps (Polder, FEM, density-modified)        |
| Show group. All git      | oups                     | Manag        | e             |        | Model building                                       |
| Select 🖉 Dele            | te New project           | 🚽 Import pr  | oject 🛛 🐼 Se  | ttings | JS Refinement  |
| ID                       | Last modified            | # of jobs    | R-free        |        | Ligands  |
| AF_POMGNT2_1             | Jun 05 2024 11:46        | 3            |               |        | Crvo-FM: Map analysis, symmetry, manipulation        |
| bugs                     | May 30 2024 02:38        | 12           |               |        | ciyo-tiki map anarysis, symmetry, mampulation        |
| 02_test_comma            | May 24 2024 01:20        | 17           |               |        | Validation and map-based comparisons                 |
| tests                    | May 22 2024 11:15        | 67           | 0.2650        |        | Map improvement                                      |
| AF_bromodomai            | May 16 2024 10:37        | 1            |               |        | Docking, model building and rebuilding               |
| aroel dock refine        | Mar 19 2024 09:34        | 1            |               |        | Definition   |
| bugs playground          | Mar 07 2024 04:43        | 13           |               |        | Kefinement   |
| fmodel                   | Feb 28 2024 02:44        | 30           |               |        | Models: Superpose, search, compare, analyze symmetry |
| SEACOAST                 | Feb 13 2024 01:09        | 7            |               |        | Modification, minimization and dynamics              |
| AF_7mjs_H_Pre            | Jan 03 2024 10:19        | 4            |               |        | PDP Deposition                                       |
| joint_XN                 | Nov 02 2023 03:49        | 50           | 0.0989        |        | TOB Deposition                                       |
| AF_7mjs_H_Pre            | Apr 13 2023 02:18        | 20           |               |        | Prepare model for PDB deposition                     |
| AF_7mjs_H_Pre            | Apr 13 2023 09:35        | 0            |               |        | Finalize mmCIF files for deposition to the PDB       |
| AF_POMGNT2_0             | Mar 31 2023 07:07        | 3            |               |        | Get PDB validation report                            |
| AF_POMGNT2               | Mar 30 2023 09:07        | 6            |               |        | Retrieve a validation report from the PDB            |
| 7brm                     | Mar 17 2023 11:39        | 25           |               |        | Generate "Table 1" for journal                       |
| 7mjs_wcsbw               | Mar 17 2023 09:31        | 33           |               |        | Extraction of final model statistics for publication |
| presentation             | Mar 15 2023 02:00        | 17           |               |        | Program search                                       |
| bughaton                 | Mar 06 2023 03:23        | 8            |               | L      |  |
| Current directory:       | // lagra (daliabaabaa-/D |              |               |        | Province   |
|                          | /Users/acliebschner/Do   | cuments/AF_F | POMGNT2_1     |        | Browse 4   |
| Phenix version 1.21.1-52 | 286-000                  |              |               |        | Project: AF_POMGNT2_1                                |

### **PDB** deposition

### mmCIF format is mandatory for deposition as of 2019



Received 21 February 2019 Accepted 3 April 2019

Edited by R. J. Read, University of Cambridge, England

Announcing mandatory submission of PDBx/mmCIF format files for crystallographic depositions to the Protein Data Bank (PDB)

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### **PDB deposition: mmCIF facts**

- Contains a lot more information than PDB
- Not intended to be human editable
  - You can read it but it is (much) harder than PDB
- Phenix tools generally produce output in mmCIF format
- Avoid editing by hand
  - Easy to make hard-to-recover mistakes

## PDB deposition: CIF file confusion

- CIF is a file format
- CIF file can contain:
  - Ligand information
  - Atomic model
  - Reflection data
  - Any mixture of three above

## PDB deposition: dos and don'ts

- Do not change the content of files from refinement for any reason:
  - Add/remove atoms (hydrogens, water)
  - Edit labels, header information
- Run Comprehensive validation (Phenix GUI) to address all outstanding issues before deposition
- Don't panic if validation statistics reported by Phenix does not match PDB validation report
  - If that happens and presents a problem start conversation with PDB stuff and involve Phenix developers
- Once all is deposited and up on the web check everything: mistakes at PDB end happen

## **User support**

### Feedback, questions, help

Mailing list (anyone signed up): Bug reports (developers only): Ask for help (developers only): phenixbb@phenix-online.org bugs@phenix-online.org help@phenix-online.org

### • Reporting a bug or asking for help:

- We can't help you if you don't help us to understand your problem
- Make sure the problem still exist using the latest *Phenix* version
- Send us all inputs (files, non-default parameters) and tell us steps that lead to the problem
- All data sent to us is kept confidentially

Project

#### Lawrence Berkeley Laboratory

Paul Adams, Pavel Afonine, Dorothee Liebschner, Nigel Moriarty, Billy Poon, Christopher Schlicksup, Oleg Sobolev



Phenix

The

#### University of Cambridge

Randy Read, Airlie McCoy, Tristan Croll, Claudia Millán Nebot, Rob Oeffner



### Los Alamos National Laboratory New Mexico Consortium



Jane & David Richardson, Christopher Williams, Vincent Chen





Liebschner D, *et al.*, Macromolecular structure determination using X-rays, neutrons and electrons: recent developments in *Phenix*. Acta Cryst. 2019 **D75**:861–877