

Caleb ([00:02](#)):

Hey, we are once again just so happy to be back and we enjoy these round tables as an opportunity to do a show and tell. But also what I value for the most of this is just the conversations that I would love if we could all be in the same room together physically and just talk and think and plan. I want to take sort of a ... Well, actually, no, I'm going to save that for the end, but just to recap, because we always end up getting some new people that are coming into what Orion is. So what is Orion? Orion is a solution that we've been working for the last 20, 22 months on and it is designed intentionally as a successor to eXtyles, whose impending expiration is upon us. August 13th, 2026 is the official end of the line for support. Doesn't mean eXtyles will stop working instantly, but it just means that Wiley is washing their hands of doing any bug fixes or maintenance or anything else to that code base after then.

([01:53](#)):

And so what we've been working on for the last 20 plus months is building out all of the infrastructure and functionality to do what eXtyles did, better. That's been our mantra of looking at the processing that eXtyles did and saying, "Well, we don't want to do it with the old OmniMark engine that forced you to go through RTF and all of the complexities and the time and the finickiness of that and move it all into modern XSL, XML-driven workflows." And so we've largely achieved that. I showed this slide at my talk at Jats-Con back in February and it's sort of a series of promises about our commitment and what we're building and why we're building in this way. And so just to reiterate this idea that we want you to be in control, my own background in architecture and graphic design, I'm a control freak.

([03:18](#)):

I like to be in charge. My impression is that editors also very much like to be in charge of what passes through their hands. And so we want that to be very much an affordance that we give you with Orion, that you have absolute control over what the automation does and that you can also have agency to make changes yourself, that you are not beholden to Typefi because we're doing things in standards and with standards as our output, that it just feels right that this should not be locked into this black box, that you can modify the way that these workflows manipulate your content. A big part of this promise is that we've also committed to and are delivering on is being able to load in or ingest or import all of your eXtyles settings into Orion so that you're not having to go through a long and costly and challenging sort of rescoping of what eXtyles has been doing for you.

([04:44](#)):

And so being able to load all of those settings into eXtyles makes for a much faster starting process. The other thing that's kind of all tied into this is because we are leveraging the Typefi Server to deliver all of these workflows, that we also have a server side, Compass is our tool that shows all of these eXtyles settings and Compass is a central repository. And so all of your individual Microsoft Word clients speak to Compass and can pull their settings down. And so you can make one change to Compass and that instantly propagates to everyone in your team. The last one is just we want to be good neighbours and the idea of being a good neighbour is that we don't block you from using other tools. If you have written macros in Word or you have other plugins or add-ons that we should not make it hard to use those, that it's not just exclusively Orion, but it's Orion plus others.

([06:03](#)):

And so that's sort of where we are in that sort of, I guess it's like this is our, I said before, it's our sort of mantra in what we're building and how we judge different things that we're doing.

([06:23](#)):

So last time I think I had six people on this slide for early adopters. We're up to 13 now that are active and we've got more in the wings that are in the final stages in discussions. And so the momentum is definitely kind of growing in the adoption and we're expanding into, we have customers that are starting to use Orion with BITS and we're very quickly going to be picking up STS and moving into the standards space.

And so keep an eye on that. And without further ado, I want to toss this over to Robin, who's going to do a quick sort of end-to-end demonstration of Orion top to bottom, then Guy is going to dive into some details. So I will stop by share.

Guy ([07:26](#)):

While we switch users, using the raise hand feature, can I get a show of hands for how many people this is their first round table for? If you're willing to share that information because we're just ... Hi, welcome.

Robin ([07:46](#)):

And hopefully people can hear me now.

Guy ([07:51](#)):

Absolutely Robin, we can hear you.

Robin ([07:52](#)):

I was trying to clarify earlier on that 33 Celsius is 91 Fahrenheit.

Guy ([07:57](#)):

Thank you. Just wondering. Nobody was-

Robin ([08:00](#)):

Yeah, I was talking into the void. Okay. Let me just share my screen.

Guy ([08:05](#)):

Welcome to the first ones.

Robin ([08:11](#)):

Okay. So if this is not your first Typefi Orion roundtable, you will have seen this document before almost certainly. So I'm going to, and Caleb said, I'm going to run through a fairly quick demo just to show you the state of the art of where Orion is at now. For those of you who keep track of numbers, I can show you that I am running Orion version 1.4.3, Orion for Word, and then there are continuous updates of other features. So I'm not going to talk much about Compass. Caleb just mentioned it. We do have the settings here and this controls many aspects of how Orion is presented through Word to you as a user and the settings are stored in this central location and can be managed by you or can be managed by us as a team on your behalf.

([09:11](#)):

So start with this Word file and you can see first of all, as Caleb mentioned, good neighbours, have got eXtyles installed. This document's been run through eXtyles. I can see a bunch of steps that have been run on it previously in eXtyles, but it's new to Orion. So if I go to my attached publication, which is kind of like activate, normalise in eXtyles, I see my publications and then we've got a handful of test publications here we can choose from and then we've got some article types. All this information is coming from Compass and I've attached it and it's just grabbed a little bit of metadata about the publication and there's an update button here. So if something did change on the server, say somebody came in and did a new version of one of the plugins or one of the workflows or something like that, you could come in here, update, and then your computer now has the latest information about what's stored in Compass. Or if you obviously have to change any of those values.

(10:10):

Metadata dialogue, this again might be familiar to you if you've used eXtyles in the past, but gathering some metadata here. This is set up according to your requirements, give us an EPUB date as well, put some bit of metadata in here, and I'm going to say we're going to have some page numbers in here and a DOI.

(10:37):

Okay. I've stored some metadata, obviously similar to eXtyles. If I come back here, that's what's still here. I can come back, change it. And that is used later on in the process when we come to make XML. So that's essentially information that you need in your XML, but you don't want to have it in your Word file for various reasons like not wanting to be accidentally changed and various things like that. Clean up dialogue, very similar to eXtyles. There's a few functions that we don't need in Orion. There's a couple of things that are still yet on our development roadmap for Orion. You can clear them all, you can set everything, you can go back to your default, same as eXtyles. I'm just going to run a couple of steps here. At the moment, this is running inside Word as code. In a very soon to arrive update, it will be running on the server as a workflow.

(11:29):

So you can see a difference here immediately from eXtyles is that we've got track changes here showing us what Orion did. So it's deleted blank paragraphs, it's deleted spaces at the beginning and end of paragraphs and so on that, which I'm going to just accept those changes and move on. So the next step again, for those of you used to eXtyles, the style palette should look very familiar. Most of the document's styled, I'm just going to style a few things here. I can use the keyboard. I can hit A for authors and I can hit O for affiliations, just the same. I can come across here. I can grab a couple paragraphs and go here, but you'll notice the entire paragraph's been selected. I can hit the style then. I've got my correspondence, then I've got my history and my abstract keywords, abbreviations, and then the rest of the palette's done.

(12:29):

Again, some of you might have been to an earlier workflow, sorry, earlier round table might've seen that if I go down to a table now, I can go into a cell, I can go to the table tab, I can hold down shift and hit table body, and now we correctly go to the next paragraph, not the next but one as an earlier version of Orion did. So that's the style palette. SmartReplace again, so this takes the place of eXtyles Auto Redact if you're familiar with that. So it's running a set of find and replace rules with a lot of control here in terms of which paragraphs to run the style on, whether it's wildcard or whether it's a literal rule. Actually in SmartReplace in Orion now, you can use standard RegEx as well if you're familiar with that rather than having to use the old style eXtyles or Word find and replace RegEx syntax.

(13:32):

So you can see I've got some track changes here. So there's a rule here that's adding periods to the end of the affiliations and SmartReplace helpfully tells me which rule has done that. We got some UK or British English to US English changes there. And then we've got somewhere down here we've got a rule to remove non-breaking spaces, which is coming from one of the default dictionaries. So those changes are tracked. If you're not interested in something like this typographic change like that, you just want it to be done, you can set that to be not tracked. I'm going to accept all the changes in a document. At the moment, we're reliant on Word's track changes acceptance. So you can either accept one at a time or you can accept them all. We're aiming to have an improvement on that so you can accept all the changes made by a particular rule and that should speed up the review of changes from SmartReplace.

(14:29):

SmartReferences, and Guy's going to talk a little bit about ... interesting. Let me just see why it thinks there are no references in the style. That's better, found 11 references in the style. So Guy's going to talk a little bit more about SmartReferences. I'm just going to run the job now. As you might've seen, of course,

Typefi has now acquired Edifix, so we are kind of the boss of it and we can fix things if they need fixing, we can interact with it. So we can use, if there's a style, for example, that Edifix doesn't have and we need to use it, we got our way into the software now.

(15:19):

And this is now running as a server workflow. Again, in earlier versions of Orion that you might've seen, this was running, it was kind of handled within the Word document, but it's running as a server workflow. I could go to this server if I pop off to Compass and I look at the jobs folder, I can see that my ... Oh, I'm in the wrong area here. I can see that my job is running here and I can see what's happening with it and so on. So this is a server workflow now in the same way as the SmartReplace that we just ran and also the Advanced Workflows that I'll show you in a second. So my results are back, took about a minute there and I got my results here. I've got things like ... So we checked against Retraction Watch. Again, some not something that eXtyles did.

(16:14):

We've got the Retraction Watch warning. There's also warnings from PubMed and from the standard CrossRef database about this article being withdrawn. And another feature here, we've got a warning that this reference is a duplicate. Again, in eXtyles, that was a separate check to run duplicate reference checking. Edifix is doing that test. So it's telling me that reference 11 and reference three are duplicates. I'm actually going to go ahead and delete reference three just to show you what happens later on. But obviously you would be reviewing this and deciding editorially, are they actually the same reference and so on. So if I just scroll up to here, I can change that citation of reference three to reference 11. I just close the Edifix panel.

(16:57):

And then this is the full set of all the advanced workflows that we have at the moment. So if you've been using eXtyles, you probably have a subset of these. And if you see things on this list you think sound interesting in your workflow, please reach out to us. The first one I'm going to run is Convert Clean Citation Style. If you remember from when we were in Compass here, I had my citation style of superscript numbers selected and here I have baseline numbers in brackets. So if I hit Convert Clean, it's going to find those citations and it's going to convert them and it's going to move the punctuation appropriately and things like it's going to use the correct dash character. It's going to separate them in the correct way. So for example, in this style, there's no space between in a list of citations, there's no space after the comma, but you could, if that was your style, you could put one in, moved after the period and so on.

(17:53):

And again, if you're familiar with eXtyles, eXtyles would've asked you what style is in use and you'd have had to select a style. Orion doesn't need you to do that. Citation Matching again is going to now use these correct citations. It's going to look for them for citations of the bibliography, but it's also looking for ... So we've got the familiar cite bib character style, again, if you're familiar with eXtyles. But further down, we've got figure citations, table citations, box citations, and we can also have citations of sections or appendixes or equations and so on.

(18:34):

So if I run a Check Numbered Citation oOrder, you'll remember we removed reference three and replaced it with reference 11. So you would expect to get a warning for that. And sure enough, this says this citation of reference 11 appears to be out of order. If you scroll down, it's also warning us that these citations of table one and two are out of order. That's because this configuration is set to use citation snaking. So we've got a citation of figure one near here and the code is then going to look at figure one and say, "Oh, but figure one cites table two, and table one hasn't been cited yet." So that's an out of order

citation. Obviously editorial, you have to review what was supposed to happen. I'm going to just decide, actually that should have been a citation of table one. Now we're all good.

[\(19:19\)](#):

And there were no citation matching warnings. So we know all the citations match up to an actual citation in the reference list. The numbers aren't correct, but there's a match all the way through. So again, if you've used eXtyles before, you'll be familiar with, that's the criterion that you need to be safely able to use citation renumbering. So I can now hit citation renumbering because all my citations match up, they're just, the numbers are wrong. So the code will now just look at this and it'll say, right, let's fix those numbers. And if I scroll down here, it will show me that we now have a nice citation here of two and three, but we've still got our warnings here about these two because I didn't clear them before and it's only bibliographic citation renumbering that it's doing. So it's still saying, but you still need to review these two.

[\(20:08\)](#):

These are fine as we know now because we fixed the citation that was in the character and so that's all good, but no other warnings here later on. And if you scroll down to the reference list, you can see that this reference has now been moved back up to where it should be so I can delete that. I'm just going to delete this one as well just to clear out the comments.

[\(20:32\)](#):

And Table Footnote Citation Matching, I'm going to run this. This again mirrors an eXtyles function. If you need links in your XML between your table footnotes and the callouts in the table, then this function might be useful. So you can see we've got a character style applied to the footnote call out and to where it appears in the footnote. It's telling me I've got an unmatched footnote there with a dagger. So if I look down, I see ... Oh, actually, yes, of course, it's a double dagger here. So I can just come in here, I can correct that to a single dagger and I can just come down here and I'm manually, rather than running the process again, I'll just manually fix that. So this will give me now links in my XML between the table footnote call-outs and the footnotes themselves. I should say later on this year we're going to be looking at extending out the citation management functions so that they include table footnotes.

[\(21:33\)](#):

So things like renumbering, things like order checking. We're going to be looking to bring those into table footnote management as well as other citations. And the last step I'm going to show is Export Preflight. Again, in eXtyles language, this was author processing because that's all it did. It just processes the author line. So you can see that Orion does that. So we've got the familiar colours for the surnames and first names and so on, but it also has parsed out my affiliations for me. It's parsed out this history paragraph into different types of date. We've got some labelled paragraphs. We've got the labels identified here, keywords and abbreviations also parsed out. So this, eXtyles does all this, but it does it as part of the export processing as a black box, so you can't really review it or check it's correct. So bringing this up front so you can review and check it's okay.

[\(22:28\)](#):

Duplicate Affiliation Checking is new to Orion. I won't show it because we've only got four affiliations here. I can quickly see that they're all different. But if you have long affiliation lists and you have the possibility that maybe the same symbol is used for multiple affiliations or perhaps they forgot they already listed one affiliation later on and if you have a hundred affiliations, quite easy to do that. So that function could be quite useful if you have long affiliation lists. Quickly just mention we have the Insert Tags menu on here now, which again, those of you familiar with eXtyles would know, does things like you can have similar to ... So it'd be the content controls rather than the eXtyles Word fields that eXtyles used, but they work in exactly the same way. And the references, as you noticed before, I'm just going to remove that again and just delete that.

(23:24):

So that works exactly the same. You can have your own custom tags if you need them for particular reasons. Then I'm going to hit export and this is going out to what we are calling our Orion JATS, which is sort of very similar to the JATS that eXtyles produced. If you had the eXtyles JATS off the shelf configuration, it's kind of almost compatible with PubMed Central. And then we also, as you might have noticed, we have an option there to give you actually PubMed Central compliant JATS. The main difference with this file is we've got the granularity in the affiliations which PubMed Central doesn't want in its output. And I can show you there. Now we have the, here's our journal metadata that came through as some of the stuff that I typed in on the dialogue, here are my authors and so on and go down to affiliations with all that good granularity in there.

(24:20):

So that was kind of all I wanted to show from the demo if there are any questions or I can hand back to Caleb.

Guy (24:31):

No questions in the chat.

Robin (24:33):

Cool. All right. Stop sharing.

Caleb (24:40):

All right. Well, I'm just going to share briefly to introduce Guy, who's going to be doing a little bit more of a deep dive into the new version of SmartRefs. So over to you.

Guy (24:55):

Indeed. Just firing up the share. Somebody give me a thumbs up that you're seeing my screen. Everybody just turned off their microphone, that was quick. Thank you. All right. So as both Caleb and Robin referred to in the introduction, the first version of SmartRefs that we delivered with the 1.0 version of Orion was a version that was built based on Word native technology because we wanted to make sure that the 1.0 version had the ability to process SmartRefs while we were preparing for bigger things coming down the line. And one of the predicates of SmartReferences and its new design was that it needed to be able to run from the server because there are customers that are running that used to run eXtyles and will want to run Orion without necessarily using Microsoft Word. I believe it's what's called eXtyles SI and Typefi is working on an equivalent to that.

(26:19):

The other side of it was, as Caleb was referring to earlier, is we want to be able to be extensible. So we've got the basic foundation of working, but the way that Typefi was originally designed was to be able to extend the basic capabilities to pretty much do whatever a customer wanted, to have that option to be able to do that, whether you ask us to do it on your behalf or whether you have the knowledge and the expertise in-house to do it yourself. So what we're looking at here is the SmartReferences 2.0 workflow on the Typefi server. Just be aware, if you are here primarily as an editor, don't worry about this too much because we're not asking you all of a sudden to know all the nitty-gritty details. If you just want to use the software, we can absolutely make sure that all of this is working according to the way that you want it, but there's also people in these round tables that are very, very much into the technical details in the background, so we're trying to cater to both a little bit here.

(27:26):

So this is an example of the workflow. There's some aspects here that, our workflows are modular, so there are multiple steps, one following the other. And the entirely new plugin that was developed for SmartRefs 2.0, we're already on SmartRefs 3.0 because the first, we're continuously iterating and fixing issues that our customers report. So SmartRefs plugin is a new plug-in that was developed specifically for this tool and SmartRefs exists to process the references when they come back from Edifix and apply all of the character styles that are needed to prepare your references for future steps in terms of exporting. One of the things that's been added now is that there's now an advanced tab. So Orion already used to do things beyond what eXtyles used to do, but the feedback we got from customers was, yes, but we don't want to do PubMed or we don't want to do Crossref or that kind.

[\(28:32\)](#):

So now with SmartRefs 2.0 and higher, we are able to give you the option of not doing the things that are unnecessary in your workflow. In terms of how this looks for Compass, so those of you that are a little bit familiar with this would've known that under the global settings, there previously was a SmartReferences area and that SmartReferences area allowed you to select the reference style and now it has support for currently one workflow possibly in the future multiple workflows. So this has changed a little bit to support the new way that SmartRefs 2.0 works. So when I hand this back over to Robin later, Robin is going to demonstrate a modification that was done to this base workflow specifically to accommodate a customer request. So we've got the base functionality of SmartRefs and then we move beyond that.

[\(29:36\)](#):

One of the things that we have observed in our choice to go from a processing of the character styles ... Actually, I'll hold that off and I'll go to Word first because as we saw with Robin's demonstration, it takes about a minute for the references to be processed by Edifix. So I'm going to open my Word file and I am actually going I'm to run the same thing that Robin ran earlier, but I'm going to go into a little bit more technical details. I'm going to go here to my references so that you can see. I'm going to move this out of the way because it is in the way. And I have already previously attached this Word file to a publication like Robin did and I'm going to run some references. So in the same way as that Robin had, it picked up what style is applied to my references and that it has found 11 references and I'm going to start Edifixing my references.

[\(30:36\)](#):

And one of the things that, and I'm going to give credit to Caleb on this one in his architectural design is that this is now while this is processing, I can continue working. So if you're looking at the references, we've added content controls. I cannot change the references now because they're being processed, but I can work on other areas of my document while the references are being processed. And that is something that was not possible previously. So I can continue to work in this file. I just can't work on the references because obviously they're going to come back and change. And what's more is I can even, let's say that's one of the things, one of our customers had more than 600 references that they were processing that takes some time. I can close this file, I can do other things and whether I get back to it after an hour or five minutes or whatever, when I open back the file, Edifix will be ready for them.

[\(31:39\)](#):

So while that's processing, we know it takes a minute.

[\(31:43\)](#):

I forgot what I was going to talk about. There was something about speed. I already mentioned the speed. I was going to say something before. I don't remember. Maybe it'll come back to me. Anyway, the job is running. I think it'll be complete by now. So I'm going to actually open my file and come back to it and I will reopen Edifix and as soon as my beach ball. So there. Now one of the things that we are currently improving on is that, and there you go. So I've opened it. It was fetching the details and now when I am ready, let me actually find the references here. I click apply and there we go. So it's now separate

processes. You can continue working in your document on other areas while the references are being processed by Edifix. And then when the Edifix references are ready, we are showing you this dialogue and at any moment of your choice, you can go ahead and fetch this job and do the final step, which is the application of the actual character styles.

(32:54):

And sometimes in software you have this idea of it just works the way that you'd expect it to work. And I think this is one of those situations where the technical design was just, it just works and it solves some problems that customers had with the first iteration of this tool. Just as a little side note, previously in eXtyles, we would have these field codes around the labels, around the references. As Robin mentioned previously, we have chosen to use content controls, A, because they're more visible and B, because I also think the interaction with them, so if you want to remove, let's say that you want to reprocess this reference in eXtyles, you would delete the fields around them. And here you can right click, let's say that one of these had an issue. So let's say that you fixed the issue and you want to remove it.

(34:00):

So if I right click the content control, I can say remove content control. And then if I open up Edifix again, I am able to, it will tell me ...

(34:17):

There we go. It will tell me that it has found only one reference that is ready to be reprocessed. So this is the changes that we've done in SmartReferences 2.0 that the ... Oh yes, that's what I was going to talk about. So there is an aspect of this where the processing of references in Edifix takes time, but the redesigned architecture of how SmartReferences 2.0 works allows you to do other things while the references are being processed. And then the speed at which, because we're not using native Word technology, but we are using XML-based technology, when processing the results coming back from Meridian, you could see that the application of the styling once I clicked apply, and you saw that previously with Robin too, was done in mere seconds.

(35:15):

So those three things combined have in my humble opinion, well, maybe not so humble, but have completely shifted the way that the experience that you will have if you were an existing user of Orion in the first couple of months. Well, those that didn't know how it worked before, you're going to have this almost magical experience. Are there any questions about any aspects of this? I'm not seeing any in the chat. I'm not seeing any hands. I am going to take that as a no. I was going to hand it over to you, Robin, right, for showing me stop sharing for showing the ... How do I stop? No, I don't want to. I am not seeing the stop sharing.

Robin (36:15):

Down at the bottom?

Guy (36:16):

Yeah,

Robin (36:16):

Yeah.

Guy (36:17):

I found it. I found it. I found it. You could probably boot me by sharing.

Robin ([36:21](#)):

Thanks. Thanks, Guy. So eagle eyed viewers might've spotted, Caleb slightly stole my thunder there. So what I was just going to show you is this again, as he said, came from a customer request. And as you mentioned here in Compass, I've now pointed to a different workflow. So I'm pointing to SmartReferences with Google Scholar links. So this is just a slight variation on that other workflow, but it now has a step at the end that outside of Edifix and nothing to do with Edifix, just back in good old fashioned CXML, like most of our Orion workflows are working, is it's constructing Google Scholar links. So I'm going to show you that in action. I'll just grab that same reference list. So if I go to SmartReference now, it's still telling me as far as I'm ... from this experience, it looks exactly the same and it'll process my references, take about a minute.

([37:16](#)):

And this is something that really would've been very difficult to do in eXtyles in that architecture was very constrained and closed. And so we were just able to take the return that comes back from Edifix. So that document that I showed you before that had the Crossref links and it had the PubMed links in it, were able to take that file and say, right, we also want to construct what people generally call Google Scholar links. Those who are familiar with Google Scholar will know, actually it's a search engine. So what you get back, what a Google Scholar link is, isn't really a definitive authoritative result in the way that a PubMed ID is or a Crossref, a DOI is, whether it's going to some unique record associated with that particular publication. What people tend to talk about when they talk about a Google Scholar link is some kind of search query that when you click on it, it's going to take you to that paper.

([38:14](#)):

It might take you to one or two other things depending on how many, so if I apply now, I'll bring my references back in, how many instances of that document are found in Google Scholar, but you can see now, and at the moment we've restricted this to just to the journals, and actually the ERF here. So the book didn't have one, but I think we probably could. The difficulty with doing it with books is with chapters and things like that, you're getting into slightly more muddy waters, but so we've got this link here now and you can see here that essentially it's actually just a query of Google Scholar with the first author's name and the title of the article. So if I click on this, hopefully it'll open in the browser in the right window. There we go.

([39:08](#)):

I am not a robot and here's that paper in Google Scholar. So this is the same. I think Web of Science does something very similar when they construct Google Scholar queries. Using the first author and the title of the article is generally sufficient to narrow it down so you only actually ever see the article your ... I mean, I suppose there might be, if you had parts one and two and three and four of the same article or something like that, you might potentially get multiple hits here. So those, if anybody's interested in adding that, it's something that we can add to the SmartReferences workflow and comes through quite nice. And one other thing I was just going to show, because after Guy was just demonstrating it right now earlier on, if you had an article like this and you wanted to say, actually, this isn't an ERF, it's something else, I can go to here and I can say, actually, it's a data reference and I haven't had to delete the content control.

([40:03](#)):

If you want to reprocess through Edifix, yes, you have to delete them, but if you just want to change them, you can do that from the menu there, which is kind of nice. I think that was all I was going to say, unless anybody had any questions about those Google Scholar links. And obviously the fact that we can do this opens up the possibility of us linking out to other resources. So if you have other databases that you'd be interested in connecting and that particularly as you move away from STM literature and you start going

into other areas where the sources of truth for bibliographies are not Pubmed and Crossref. So yeah, I will hand back.

Guy ([41:01](#)):

Muted, Caleb. You would think that after all these years of doing online...

Robin ([41:12](#)):

He's still muting. There we go.

Caleb ([41:15](#)):

It's like the control, it hid and I had to chase it.

Guy ([41:20](#)):

Where is it? Where is it?

Caleb ([41:22](#)):

So I want to talk a bit sort of like we've been pushing hard for the last 22 months in this and so we're just finishing out this last quarter and so you can see this first column, all the things that we have delivered in that quarter. Coming up next in the July to September timeframe, you'll see it's another full column of stuff. The big marquee things that we're looking at in this next quarter is getting into NISO STS as an export, launching officially our version of Orion SI, the server side edition. And the work that we did to move SmartRefs from being local within Microsoft Word to being server side, the next target for that in moving from local to server side is the cleanup function. And so that's one of the dependencies before we can launch the Orion SI. Other things that are coming in here in this timeframe is being able to take your content and do a direct deposit into PubMed and your Crossref metadata so you have a one-stop shop on that side of things.

([42:59](#)):

So we're getting into that kind of production side and then looking at where we are aiming for the end of the year, big one is the Orion Word version two. And so most of the things that are listed underneath here, symbols, auto-styling, style mapper, SmartText, SmartChanges, all that sort of wrapped up into the Orion version two and we are excited to sort of move into this kind of ... Orion version one is all about parity or slightly better than eXtyles. Orion version two is like, okay, now we've satisfied that. Let's push this a whole lot further, a whole lot faster. So we're going to end the year with a bang.

([43:56](#)):

And then I wanted to give a little bit of a teaser as where we're going with our next round table so you can have an idea of what we're going to talk about in the feature side of things. So one of the things that we just didn't have time and room in this one for is talking about validation. And so I want to talk about that next week, not next week, next month. And so whether it's DTD validation or schema or Schematron validation, including JATS4R so that you can be confident that the content that Orion is producing is fully compliant on that side of things. I also want to talk about how we can use Schematron embedded within your workflows to enforce editorial standards and quality control. So you're not doing all this work and then doing QC at the very end where it's generally speaking more costly, but having QC integrated into the process as we go through.

([45:03](#)):

And lastly, there's this idea around content enrichment, so there are two things that are related and one of these actually came out of a conversation that we had with someone at SSP just a few weeks ago. And so

eXtyle has had this feature around accession linking for protein and gene databases. And so we had this conversation at SSP about RRIDs and what Typefi could do to help with the adoption, I guess, of RRIDs, which have been part of the JATS standard for a couple years now, but the tools just haven't caught up in that sense. And so I want to show off what we've built around being able to identify and validate RRIDs in your content. And so that's what we have coming forward in the future. And I know one of the things that I love the most about these roundtables is turning it back over to you as a conversation.

(46:25):

So if there are things that you want to talk about, please jump into the chat, turn on your camera, and let's have an open conversation. The first question I see from Cindy is, what do I mean by persistent IDs? This is about the accession linking and the RRIDs. So these are both persistent identifiers in the same way that a DOI is a persistent identifier for a document, that with protein and gene accession links going into most, many of them are in NIH databases, but there are also ones out of Europe and so forth that are pointing to, oh, hey, we're looking ... I think COVID produced a huge volume of these links in all the analysis that was done there, but RRIDs is looking at things like, oh, I'm experimenting on this and here is something that I want to be able to offer as a data source so you can recreate what we're doing.

(47:51):

That's really what the RRIDs are all about is making the research replicatable so that you're not just looking at a paper, but you can look at all the underlying data and you can recreate it to test and verify that that paper is accurate.

Guy (48:09):

Oh, I like it. There is an earlier question from Rafael around different and non-standard reference styles, which I thought about typing and then I was like ... And I've seen your question, Ron. I'll answer that after Rafael after, but I was going to type Rafael.

Robin (48:26):

I just typed an answer in the chat for Ron's question, but we can read it out as well if-

Guy (48:31):

Yeah, I think it's just so that others know as well. Yeah, I was going to type Rafael's answer and it's like, that's too much here, better that you answer it, Caleb.

Caleb (48:48):

What about different and non-standard reference styles? Okay, so here is something that we are ... I guess I'll pre-announce, I guess. So one of the things with eXtyle, that you have your reference structure file and you may also have a custom journal abbreviation file that says, oh, how I want to do things that are different, that your references don't fit within an existing standard of what Edifix has. So the next release of SmartRefs, version four will actually have direct support for the .xsp files that eXtyle uses to define your particular reference editorial style. And so you'll be able to just load that directly into SmartRefs. You'll also be able to load in your own journal abbreviations override file so that when it runs through and processes with Edifix, what comes back is exactly matching what you had with your old eXtyle structure.

(50:13):

The feature that's coming after that is adding support for CSL, which is a much easier to work with standard as opposed to the reference structure file that Edifix uses or eXtyle and then now Edifix uses. So that's our plan in the long-term for SmartRefs and Edifix is that we're going to add in the ability to import your eXtyle config to match your style and we're going to add in support for the industry standard

of CSL to go beyond that and make an easier more ... Well, it's just so much easier to build a CSL than to try to understand the very esoteric markup structure that the eXtyle reference format used. But yes, so that's coming in the very near future and I expect we'll have that ready to go in maybe this time next month.

Robin ([51:32](#)):

I was just going to jump in if I may and just say that there are CSL templates already available for many hundreds, if not thousands of reference styles. I know they're not all perfect, but they certainly, things like EndNote and Reference Manager and Mendeley have been using them for a long time. So if you did to switch over to a CSL template from an existing eXtyle reference template, wouldn't be starting from scratch.

Caleb ([51:58](#)):

Yeah. I think the last time I looked at the CSL library, there were over 10,000 different templates that were defined. Now some of the templates very like it's like, oh, well, this is the one without the title. This is the one with this thing. And so they're not 10,000 totally unique, but yeah, there's a huge library of them. And again, they're easier to work with when you want to create your own.

Guy ([52:30](#)):

Yeah, Ron's question was whether anybody can remove the content controls and the answer is yes because content controls are Word native. I think even if you're using Word on the web, you can remove them.

Caleb ([52:45](#)):

That is correct.

Robin ([52:47](#)):

You could also edit them. So you would change the value in the way that I did as well.

Guy ([52:53](#)):

Well, you wouldn't have the Insert Tags in Word on the internet or on the web. So yeah, that's one of the reasons why we chose them because we were looking for something that was more protected than field codes because the problem with field codes is that ultimately they're text and content controls are more lockable but still very easy to interact with because like you saw, you just need to right click to remove them and they more cleanly identify and are less likely. You can't make a typo and turn an EREF into an ERF and then have everything break, but they're still Word native, so therefore we're good to go, that aspect.

Caleb ([53:47](#)):

Right. Any other questions? Nothing else in the chat? Is there support for other identifiers? Aha, yes, we're looking at credit on that side of things and then we had conversations with ORCID about some of the stuff that they are wanting to do around ensuring the author information is not manipulated. So yes, I think the approach that I'm taking from a product manager perspective is that if it is a good idea, talk to me about it. If this is something that is useful beyond just your individual needs, but this is something that could be beneficial to everyone. And I think that kind of gets into Katherine's comment at the very top of the chat of how we are a community and this idea of helping one another and if something is useful to you, maybe it's useful to somebody else. And so I definitely encourage you to speak up.

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[\(55:20\)](#):

And if you have some interesting clever scripts or macros or things that you're doing that you want to share, I'm happy to be that intermediate layer to help distribute this to a wider audience. So I just feel like we're in this together and let's make something beautiful and functional and useful together.

[\(55:57\)](#):

Anything else? Otherwise, I just want to say thank you again for joining us. This has been quite a journey. I hope you can feel the excitement and the pride that we have in what we've built and we are just looking forward to continuing along this path and looking forward to showcasing more and more features as we get further along this journey, but it's definitely been a journey together and it is always exciting. So thank you all and we will see you at the next time.

Robin [\(56:41\)](#):

Thanks everyone.

Audience [\(56:42\)](#):

Thanks guys.