

Caleb (00:01):

All right, well let's go get started. So this is our August roundtable and we will be hosting another one next month and then another one in October. So for anyone that's new, just sort of joining the Orion community and catching up on things, just to introduce you to the team that is presenting today, my name is Caleb Clauset. I'm the VP Product at Typefi. Also joining me is Guy van der Kolk, who is a Product Manager and Robin Dunford who is also a Product Manager with me. So I want to talk to you about our Orion 1.0 roadmap and sort of where we are and what we've completed so far and how this is going to sort of play out and what you can look forward to seeing in the next roundtables and so forth as we get towards the end of the year.

(01:06):

So just first to sort of reiterate what is Orion and why is Orion? Orion is built on a strong base that we've been developing on for 20 plus years now and automating Microsoft Word and integrating that with Adobe InDesign. And we're taking a lot of that IP and recasting that into an editorial solution to act as a drop in replacement for eXtyle. One of the things about this is that because we're leveraging a lot of the same or we're leveraging the same underlying host application, Microsoft Word, any customizations that you've already built on your macros, the familiar user experience, all of this makes it much easier to implement and our goal is that you'll be able to be working in eXtyle one day on a Friday, come in over the weekend or come in after the weekend and continue working in Orion. We want it to be that seamless. And so a big part of that is how can we import or ingest or migrate your settings from eXtyle into Orion and then how can we sort of meet and exceed your expectations. So some of those things we've identified change tracking and just the time it takes to do some functions within eXtyle, that Orion is using a different model, different technologies to achieve results faster and more reliably. We also have tight integration with Inera Edifix for all your reference correction and linking, which actually surpasses the functionality you have today in eXtyle.

(03:05):

So let's get into what the milestones that we've been focusing on internally and how this looks to be playing out in the future. One of the ideas behind these roundtables and the one-on-ones we have is that we want to be really open and we want you to come along this journey with us. And so where we are today, August, we have implemented the paragraph styles panel. We've got the Smart Replace engine, which is our version of Auto Redact. We've got the reference processing, linking and correction. We have track changes and comment support and exporting to JATS XML. Today, Robin's going to demonstrate the automated author tagging component. That's one of the milestones that we've just recently completed, and then in September and October you can see that we're continuing to progress along sort of this. Here are the key features and functions that we have within eXtyle and we're adding those on month by month.

(04:08):

Something to draw your attention to, in October we're going to be sending out invitations to join a private Orion beta test. And this is something that we're in the process right now of looking at partner sites that can provide feedback and help to evaluate and keep us honest as far as what we're delivering and what we have set up for this 1.0 release of Orion. But some of the things that you'll see in our September roundtable, or you can anticipate, is that you'll be able to see sort of the tagging of keywords and dates and abbreviations and hopefully our first draught of the citation management component, which is actually a really large piece of what we need to think about with eXtyle as far as making sure that your figures and your tables and things are in the right order, that they're referenced in the right way, that we don't have things that are missing on either side, being able to renumber things.

(05:19):

All of that is part of that citation management component and we're going to release that first draught. Just like right now we're releasing our first component of the author tagging. Affiliation tagging is going to follow probably in the October timeframe. Another piece is for the September timeframe that is pretty key in this idea of the seamless transition from eXtyle into Orion is being able to take all of your Auto Redact rules, all of those dictionaries you've created that you might have built over many, many years of time, that we are going to import those directly. So you don't have to go through and reevaluate, redo all this work. We can just pick it up and drop it right into place within Orion.

(06:12):

Moving beyond October into the November timeframe, one of the things that we are also recognise is that yes, we have this integration with Edifix for managing and cleaning up all of your references, but there's a time, there's a time commitment that is not always great. If you figure each reference takes two to three seconds to resolve, if you've got 300 references, you're looking at 10 plus minutes of just waiting for Edifix to return all their results. And so we have scoped out a parallel processing model that should halve or even less than half, or sorry, more than half, cut your speed down. So if you had 300 references, that my goal is that you don't ever have to wait more than four or five minutes max to get your references back. And so we hope to have that first cut of that solution available to showcase in the November timeframe.

(07:32):

This is also sort of the last stage in November to sort of tighten everything up as far as what we're delivering for Orion 1.0 which is going to launch at the end of this calendar year. Now I want to sort of point out that the way that we're focusing on Orion is we want to get this into your hands as quickly as possible so that you can actually do real testing and that you can do integration work and you can evaluate the software well in advance of the sunset of eXtyle, which is August of 2026. And because of that desire to get this out faster, we're launching Orion in a series of drops, that the Orion 1.0 drop will support JATS workflows. Orion 1.1, 1.2 will support BITS and NISO STS workflows and so those will all be released in sort of measured order across the first half of 2026, again so that you have this ability to evaluate and look at how Orion can fit into your workflow before you get to that sort of point where eXtyle is officially no longer supported.

(08:51):

Now because I am coming from an architecture background, I'm very visual and so I wanted to share just this little simple chart that we are using internally to sort of track our progress. So this is what we call a burndown chart. And using as a starting point where we were at the end of the SSP demo, and we had a different chart for getting to SSP and the CSE presentations in June, or actually in May when we wanted to be able to show here is a proof of concept of an end-to-end solution with Orion, there were a lot of things that were missing from that. And so the blue line that's creeping up as our team is estimating the effort points, here's what we think we need to do and here is the complexity of those tasks and then the purple is our progress in answering those issues.

(09:57):

And so you can see that the blue line has crept up as we get further into some of the details and realise, okay, this is actually a little more nuanced or we had postponed estimating something until later and so that's crept up, but at the same time the purple is angling down at a nice steady rate. Our goal again is to get this sort of complete, that burndown chart should be moving down to zero by the end of November. And so that's sort of where we are in thinking about at the high level in product management around Orion. And now I'm going to turn this over to Robin to give you an actual sort of show and tell demo of where we are with the author processing. And so I'm going to stop my screen sharing.

Robin (10:56):

Well, okay, so hopefully you can see my screen now and apologies if I don't appear to be looking at you while I'm doing this because I'm on a different monitor. You can see, you might recognise this, some things about this document from the earlier demos. This is the same WHO Bulletin file that we've used before except I just thought I would just change up the authors and affiliations a little bit just to make you, convince you that it doesn't only work with the authors who are on the original manuscript. So Sarah Mercado, wherever you are, forgive me, you are no longer an author of this paper. We've got different authors now. And one other thing to point out before I just run the demo is that you can see I've actually got eXtyle and Orion installed on this same machine and I can run this same file with either of these tools.

(11:53):

Again, this is kind of similar to what you've seen before. You'll see there's now an About Orion box here because we are onto our first internal numbered version now. So that's akin to the eXtyle about box where you can check your version number, that's been implemented. And now we are starting to fill out this advanced processing menu as you'll be familiar with. Again, if you're familiar with eXtyle, there are several entries on here and we're starting to fill this out now. As Caleb mentioned, a lot of the citation handling stuff is well in hand and we'll be demonstrating it shortly. So author processing, just to switch quickly, draught mode, you can see we've got the author line and a particular paragraph style and then the affiliations are a different paragraph style and similar to the way eXtyle works, Orion is going to use those paragraph styles and it's going to pick up the author line and it's going to check where the affiliations are in the document and it's going to make sure it's doing exactly what eXtyle does.

(13:04):

Basically this behaviour is the same as eXtyle, it's there we go, in that what this process does, as it does in eXtyle, it tags up the names as you can see first names and surnames. It picks up these affiliation markers here and it makes sure that each of the affiliation markers that appears in the paragraph has a matching affiliation. That's the extent of the eXtyle functionality and that is currently the extent of ours. Just to show you, there were some tables in this file and it processed it in just a few seconds. I'm not sure exactly how many seconds I can check but did the processing in a few seconds and there we are. That's pretty much all there is to say about author processing for now so I can hand back to Caleb.

Caleb (13:55):

Awesome, thank you so much. Alright, let me get back into here. Alright, and so next up in our sort of show and tell side is Guy van der Kolk to give you an update on where things are in the Orion for Microsoft Word.

Guy (14:20):

Alright, so before I go into Word, I'm actually going to give you a little sneak peek at the updated, the updated Orion configuration. So those of you that have seen the previous iteration of this, it was very bare bones because we wanted to show you that we were going to, one of the issues that we were hoping to solve is to make it more user-friendly to be able to make your changes, but the other side of the equation is also as Caleb has mentioned, our most foundational goal with Orion is making sure that you can have a transition that happens as seamlessly as possible. And part of that is going to be simple magic for you because it's very hard to imagine how much time the engineers are putting into it so that when it comes time for you to start using Orion, it'll be that magical experience of wow, this stuff is what used to be, these are my settings and eXtyle and this is how it now happens in Orion.

(15:29):

So a lot of work has gone into that, but we're also obviously spending some time looking at how all of that is going to be configured. Taking into account this idea of having these settings that are true for all publications while at the same time having support for items at the publication level. This is still very

much a work in progress, but I did want to show you some progress that we've made. Like we've added an area where all the styles that are part of, in this case we're currently working on the JATS default export from Orion. So all the paragraph styles that make part of that, but the style sets, so configuration area for the style sets that are important for advanced processing and some of these other tools that Robin and the team are working on and more updated cleaner version of the ability to work with style groups.

(16:23):

So the next roundtable we have, this is going to be in a much more developed state and I will also be in a position to show you a little bit more behind the scenes of how this actual import of configuration and how a new configuration is going to be done versus how a customer configuration will be done. But the team has been hard at work and I just wanted to share this with you before we talk a little bit about Word. If later during the roundtable you have any questions around this process or things that you want to make sure we don't forget to think about, the round table is just around the corner for you to be able to ask me any questions related to this. The other areas, as we were saying, we have gone quite, we're quite a ways along with the Orion for Word plug-in. So the foundation is all there. One of the most foundational features, and we've talked about that in the past, is obviously a paragraph style panel. The team and I have done a lot of work to make sure that, and this panel has actually seen its first round of QA where we've spent a lot of time to make sure that all the functionality works exactly as it did in eXtyle because for one thing there is nothing wrong with the way that the paragraph styles panel worked. The team at eXtyle, Inera, did a wonderful job in making this panel work the way it does.

(17:57):

So we wanted to make sure that a tool that is already working well is implemented in a similar manner for Orion. But the other thing is also, you are used to how the paragraph styles panel works and we want to make sure that you can continue using that and not on a Monday when you stop using eXtyle on Friday and start using Orion on Monday that you need to learn new ways of doing things. Everything here pretty much works the same way. The only thing that we did change, but it's only a button name. You can see that we chose to still use the same keyboard shortcut for it just to make sure again that that muscle memory for you is the same if you are coming from eXtyle. But we did change this to merge and splits because I just couldn't live with new paragraph.

(18:49):

I hope you forgive me my, whatever you want to call that. Another functionality that is going to be different, it wasn't quite ready to demonstrate right now, but is the undo functionality. So one of the questions that I had originally had for the roundtable for you is how much do you dislike the fact that the undo system was different in eXtyle from the regular Word one that eXtyle kept its own undo stack and different from Word one, Word's one, but our engineers came up with, after some serious sleuthing, came up with a method in which we can make sure that the undo button in the Orion paragraph styles panel will actually tie in directly to Word's native undo stack. It is completely new. So the team also found some bugs and issues in this week that we decided to not put it in this preview, but the next one in September we're absolutely going to show that.

(19:57):

So that's a little change that we think is going to be very much for the better. The other thing that we are spending more and more time on is finalising what are the features that we are and aren't going to support. And some of these, if we're looking at the Cleanup panel, you can see that the Cleanup panel is leaner than it was for eXtyle because we don't need to do the same kinds of cleanup things that was needed for the workflow that was necessary in eXtyle. So we are going to have a cleanup panel, at least at launch that is going to be leaner. And then as customers start using the tools, we might find other areas that need a different kind of cleanup than was necessary for eXtyle. So that will be continued to be iterated on into the future. But the Cleanup panel is also one of the items in which I have some questions for you as attendees for the roundtable.

(21:02):

I see there's a mention in the chat, so I'll check that in a second. But you can see that the graphics area is still greyed out because the graphics area is an area where we had some questions around the use cases that you are using in a Orion workflow. The graphics can be kept in the Word file without any issues, so there's no reason to strip them out. I know that that was part of the reason for doing it in eXtyle, but Robin also mentioned that there was a reason that customers would extract the graphics out of the Word file and keep them in a separate location. So one of our questions for the roundtable that I'd like to present to you and then I'll stop sharing my screen, is how important is the ability to extract the graphics out of your source Word file into a folder or wherever and then keeping the, I think it by default it says figure 01, 02, and so on and so forth. That's my first topic for the roundtable. I do have some other questions, but that's the one where I would like to start the roundtable off with.

(22:30):

Let me see what the question is in the chat and if I need to, lemme clean up.

Caleb (22:38):

That was just me being funny.

Guy (22:39):

That was you being funny. Well, I did notice this morning I filed a quick issue because I did notice that we are inconsistent. We've got clean-up in the UI here and we've got CleanUp fancy and so we still have some cleanup to do. I finally filed an issue for that this morning, but we'll have more of that as we go. So yeah,

Caleb (23:00):

So the point here, some of the stuff that we cleaned up out of the Cleanup dialogue has been removed because Orion doesn't have the same limitations. So some of the cleanup functions that eXtyle offered were there to remove things that Inera knew would cause problems in their processing. And because they don't cause problems in our system, we're like, well, we don't need to remove those. And so that's kind of an open question though. If you have other steps in your workflow that you still want those to be removed, that's part of a question for you. The other side of it or other side of coin and some of the stuff that we cleaned up out of the Cleanup panel are things that kind of fit more into the Smart Replace / Auto Redact side of the process. And so those have been moved over into the Smart Replace. And so when you import in your existing Auto Redact rules, we'll provide an addendum that will allow you to re-implement those things that were removed from the Cleanup dialogue, like the white space around percentages and SI units and all that sort of stuff. So that's sort of some of what was removed from the Cleanup dialogue. Hopefully that's sort of an explanation for that.

Guy (24:38):

And if not, Luciano, do by all means, let me know.

Robin (24:45):

Yeah, it's just things like Word bookmarks that eXtyle needed to strip out, well Word fields. We're still finding out a way with the Word fields exactly which ones we are going to need to deal with, but we don't have the same as Caleb said, same limitations.