

Caleb ([00:01](#)):

But as we get into it sort of, once again, the team, the hosts, myself, Caleb Clauset, I'm VP Product here at Typefi, also on board our Guy van der Kolk and Robin Dunford who are two product managers that are working with me and leading the effort around Project Orion. Just to give you an update on the roadmap for Orion. At a glance, nothing's changed here. This is the same slide I've been using for the last several months, but the idea here is that we keep getting more and more people signing up that are interested in Orion and so we sort of run over this every time. What Orion is in many ways it is a drop in seamless replacement for eXtyle. This is by design. We want it to be as easy to use for those that have been using exiles in the past and having a direct migration from Inera eXtyle into Typefi Orion.

([01:07](#)):

So we can pick up your Auto Redact dictionaries, we can pick up the design of your document information dialogues, all your paragraph styles, the keyboard shortcuts, all of your article types, all these things that you have done within there. Even taking as far as if you have a custom reference format within eXtyle that we can take that and adapt it so that we can use that to create the same output from Edifix. So we want this to be as easy as possible for you because change is hard, change is stressful, we're taking on as much as we can to make it as easy as possible for you. Looking back at the milestones and sort of what we have done so far with Orion, a big push in the first half of the year was to be able to do a end-to-end sort of high level demo showing a paragraph styles palette that looked almost exactly like the styles palette you had in eXtyle. Building the SmartReplace engine that takes in your Auto Redact functionality, integrating with Edifix to provide equivalent and actually slightly better reference processing, linking and correction to eXtyle.

([02:35](#)):

Adding in support for track changes, which is something that eXtyle didn't really support. You had to do a document compare to create a diff from your base file to the current document. And the major goalpost for us in this initial release of Orion is around JATS XML. So all of that we had in a very rough but demonstratable shape earlier in the summer and then we just kept building and adding and iterating on that. And so in September we talked about the tagging with keywords and dates and abbreviations and doing some initial citation cleanup.

([03:26](#)):

What we're talking about today is more of an end to end sort of demonstration. We've been very particular in the language we've used to talk about Orion to date that we talked about previews and showcasing, and now I feel like as product manager I feel comfortable saying we're going to give you a demo. This is about as close to final as we can get. So it's really starting to come together. Very excited to show what we have now. What's coming up next? So Orion Meridian is our backend server that sits in between the Orion client for Microsoft Word and initially Edifix for doing those references and cleanups and so forth. And so Meridian is a tool that we're continuing to build on and iterate and so that's coming out in November. And then you'll notice in italics there's a lot of planning or internal things happening in November that the features in Orion are sort of slowing down as you get closer to needing to have that final candidate release to QA for testing, doing internal training for our own teams, running the Orion beta and then getting into December for the actual full blown launch. Coming up very early in the new year, inline URL validation. Right now the URL validation is an external report. It's not embedded into your Word file and the way that eXtyle did it. So that's coming in first part of next year. And then NCBI identifiers coming up shortly afterwards, getting into the Orion BITS side of things so that we can launch that full BITS release for customers that are waiting on that in the first, right at that sort of bridge between the first and second quarter of 2026. So that's sort of the high level milestone view. I come from a design background, I really like visuals and so this is the burndown chart updated for here. Unfortunately our burndown cycle ends on Friday, so I don't have the stats yet for where we are as of this Friday the 24th, but you can see that progression and we slapped a trend line on there. We can see this arrow is in a very

good direction. If you sort of extrapolate where that curve goes, it is coming in right at the end of the year. And so that is a very encouraging piece for me as a product manager that all this is coming together as we have hoped. The big blue area is all the work that we've accomplished. The purple at the bottom is the tasks that are remaining to be done. So that's what we want to see that go to zero and the blue just continue to take over the screen.

(06:56):

Alright, I'm going to hand the reins over to Robin and let him kick off with a more comprehensive demo in Orion for Microsoft Word.

Robin (07:12):

Thanks Caleb. So I haven't checked everyone who's here, but if any of you were in Frankfurt last week and spoke to us or saw a demo, you'll know what it's like to try and demo software while it's being written at the same time. So there are lots of plates being spun and I had everything working last night when I left my desk and I came back to my desk this morning and I had to change a bunch of things to get them to work again. So fingers crossed. You'll have seen from the last round table, I think we had the Orion ribbon looking in something like this shape up at the top here. Just worth noting that I have actually got eXtyle installed on here as well and the two of them run perfectly happily together and I could run some of these steps in eXtyle and switch back to Orion and happily go between the two and that all works. They play nice and that all works fine.

(08:20):

So this is a document you may have seen before. I've made some changes to it just to demonstrate some points of what I'm going to demo today. And it's actually styled, I just switch across it's styled using the eXtyle JATS paragraph style palette if you're familiar with this. This is the default off the shelf set of styles that eXtyle had as a product. And so this is what we're working on as our kind of generic set of paragraphs styles and just scroll down. I've already run just to save a bit of time later. I've already run document through the SmartReferences function so I won't have to do that again later. We've got a box down here, we've got a couple of tables and we've got a couple of figures down at the bottom.

(09:07):

Okay, so the first thing I wanted to show you, I just switch back to print view. So SmartReplace, this is our replacement for Auto Redact in eXtyle and got a couple of different workflows set up here, what we call SmartReplace Basic is again similar to if you had eXtyle JATS, it ran some quite low level typographic cleanup on the document and nothing else, no real language edits at all. What I've called SmartReplace Custom here is kind of based on the WHO eXtyle configuration, which is who supplied this document to us. And this does much more sophisticated things. I'm just going to run the custom.

(09:55):

There's sharp eyed editors among you will notice that says author processing. We need to update the dialogue so that it actually shows what it should be showing. But so you can see as we talked about before, you've got, hopefully you can see that you've got track changes on here for anything that's changed. It's telling me that this particular rule, so rule one in a dictionary called Orion Custom American, rule one made this change. I can scroll down here, I can see actually as rule 11 in that dictionary made this change. And you notice is here, I've got Pre Edit Rule 35 made this change to change the fixed spaces to regular spaces. So as an eXtyle admin, I would've absolutely loved this. If you write your own rules and you can't figure out why they're not behaving as you expect, be able to see, oh, it's that rule that's doing it right, okay, fine, I'll go fix that. That would be really useful. And we are hoping also be useful for our internal debugging and ultimately as well longer term that we can have a system where you can say, accept every change that was made by Pre Edit Rule 35. Accept them all in one go. I don't want

to go, I don't want to look at each one individually. That's still on the drawing board, but having these IDs in here now gives us that option to do that.

(11:33):

That's a smarter place. I'm just actually going to accept all those just to clean the file up when we go ahead for the next step. So I've already run SmartReferences, so I don't need to show you that. So now on the advanced workflows menu, now this is starting to look a little bit more like eXtyle. Now we've got author date reference sorting. Obviously you might've noticed this document has numbered references. I'm not going to run that document. And again, similarly with eXtyle, you can add in or take out any of these you don't need. So if you only use numbered references, you wouldn't need author date reference sorting. It just wouldn't appear on your Orion menu. Citation matching, citation order checking, bibliographic citation renumbering, all these pretty familiar from eXtyle. This last one we're calling Export Preflight for now, this might change.

(12:31):

This is kind of our take on Author Processing, which you'll remember from eXtyle only works on the author line, puts the styling in there. But we're also taking out some of the black box that was again, what some of you eXtyle admins might be familiar with the term, the NLM backend, eXtyle called it, which is kind of hidden code within the export architecture that parsed out things like dates and keywords and abbreviations and affiliations and things like that so that you didn't have to parse them out separately. But we've taken a decision to show that process, bringing that up into the daylight. And you'll see in a second what that looks like when I get to that point. So I'll run Citation Matching again, you'll see the dialogue, the little progress dialogue doesn't reflect the date yet, but that's still to come. Okay, so we've run Citation Matching and this is something that actually be useful to get feedback later.

(13:30):

At the moment, Orion doesn't tell you it's finished, it just stops and it carries on and it doesn't have the notification that eXtyle had where it said it found X problems or something like that. So if you think that's useful, we should be able to put that back in. So here you can see that we've got some citations picked up here, tables here, scroll down. Oh, there's a citation here of figure three, but you'll see there is no figure three. Obviously these have got some polishing to do, the text of the warnings that we're putting out. And then if I scroll right down, I've got down here below this table somewhere, I've got a figure two which is in itself not cited. So again, as with eXtyle, you would just need to, is this just a typo on the author's behalf or should there be another figure? And so on. You'll figure that out within your processes as you would with eXtyle. I can now do order checking. You'll also notice there that the little green check marks that eXtyle puts on the ribbon to say you've run a process, we haven't implemented those at this point. Again, it would be really useful to get feedback as to whether you think those are useful.

(14:59):

Okay, that was so quick. I wasn't even looking to see it finished. It's finished and it's pointing out here. We've got a citation here, reference one, and then we've got citation of reference three, which is out of order, and then three to two that goes out of order. I think this extra warning here is slightly redundant. We'll look at that. But anyway, so we've got a warning here about these being out of order just to show you down here. If we go to reference two is by this person, Britteon. And then reference here is by Lai et al.

(15:31):

So again, similar to what you're used to seeing. And then if I go to renumbering, it runs through and here we go. Now we've got reference one here now, reference two, references two and three. Just scroll down to the reference list. Now the Lai et al. reference is now reference two, the Britteon reference is now reference three. Obviously exactly as you would with eXtyle, you'd have reviewed this. Is this really what they meant? Am I okay just to hit renumbering? That's an editorial decision for you, but the code is

in place, up and running now. I've also noticed you might have seen this as well, that some content's moved there. I spotted that when I tested this morning. So we need to figure out, something gone slightly awry there that we've duplicated a bit of content, we need to figure that out. I think I've got a good idea as to why that is, but anyway. And then the last option we have here on the menu is the Preflight step. And what this is going to do, it's going to parse out the author list like you're used to. It's also checking that all those affiliations are linked to an affiliation, all those affiliation markers in the author line. You'll see here, it's also now parsed out the affiliation. So we've got institution, we've got an address line, we've got a city, we've got a postal code, and we've got a country. Yeah, I noticed as well that I've used the same colour of the state and the institution, but hopefully you can see here that Punjab is actually a state, it's not an institution, easily fixed. So we've got the affiliation parsing and then down here we've got in the keywords. So each individual keyword has a character style applied to it.

(17:26):

And in the abbreviations list, the term and the definition have different character styles associated with them. And that means obviously you could then review this and if there are errors, if we haven't parsed things out correctly, unlike with eXtyle, which would just silently under the hood, take this through into your XML, you could actually fix it by hand and then run the export so you don't have to waste time exporting, seeing there's something wrong in this kind of black box parsing that eXtyle used to do, fix it and run it again. Run the export. Sorry, you're not running it again. You haven't had to export. You've got the information there in the Word file. There's more to come here, for example, we're going to be picking off things like run in headings with a character style so that again, you can review those and make sure that they're correct. So I think those, that was everything I wanted to show in the new version. I see. Is there any questions that are relevant to me in the chat? I'm not seeing the chat while I'm screen sharing.

Guy (18:38):

I think, but I may have missed it. One of the pieces of feedback was that author processing wasn't tagging the authors, but I was paying attention to the chat. I believe I saw the demos. Yeah, exactly. it was doing...

Robin (18:50):

Yeah.

Guy (18:51):

I think the confusion was coming from the fact that currently all our dialogues are called Author Processing.

Robin (18:58):

They all say Author Processing.

Guy (19:00):

Yes, that's right. I know that's something we want to fix.

Robin (19:02):

Yeah, that's hardwired into the C# code at the moment.

Guy (19:07):

That's something we're going to fix.

Robin (19:09):

Right. Yeah, exactly. Exactly. That will get fixed, and then you've got your affiliation markers being linked here as well.

Caleb ([19:25](#)):

There's several votes in favour of the green check marks.

Robin ([19:29](#)):

Right.

Caleb ([19:30](#)):

So I think that was, we asked it, we drew your attention to it and you're like, oh yeah, we do like that.

Robin ([19:39](#)):

And people might know I was an eXtyle user for many years before I even joined Inera. And I think people do find it useful, particularly because if you run one step up right after another like I've done just there, it's okay. But if you come back on a Monday, a file you were running on Friday, it's just useful to say, oh yeah, okay, that's how far I got. So yeah, we should be able to look into and figure that out.

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

There's an interesting sort of side conversation around the comments. For example, when we had the citations out of order, that reading between the lines, there's this idea that, okay, well this file with these comments, this might go back to the author for confirmation. Is there a way to adjust or change the text in those comments to? So that might be an interesting conversation to sort of have in the roundtable in the second part to talk a little bit more detail about what you might want to do there and how that works. I can...

Robin ([20:59](#)):

Yeah, I mean certainly in eXtyle that text was stored in an external file that was maintained by Inera, but it was possible to override. So if you wanted to use different text compared with the eXtyle defaults, it was possible in eXtyle to do that override. At the moment, all these comments are not externalised in Orion. They're all basically baked in at the moment. But again, this is something that should certainly be doable to open that up to, certainly the ability, and I think for us internally as product managers and developers to be able to just easily, instead of having to sift through the code to find where the comment is stored, to have it somewhere localised. I think that would also be useful on our side, but absolutely...

Guy ([21:54](#)):

Not for the release in December.

Robin ([21:56](#)):

Right.

Caleb ([21:59](#)):

All right, Robin, if you'll stop sharing. Sure. Let's see, just very briefly for me, I'm going to say here is the opener slide for Guy and I'm going to stop sharing and send it over to Guy.

Guy ([22:21](#)):

Every one of these applications puts the share button in a different location. Alright. So my update is not super extensive, but the last time we met each other in the roundtable last month, we were talking about, we showed you behind the scenes of the Typefi Orion Compass and how a lot of these things, I really like the wording that Robin was using, we're bringing a lot of these things to the forefront more easily so that, some of these things are just more visual and more easy to control. But one of our main promises is that the ability to start working or to stop working in eXtyle on Friday and start working on Monday relies very heavily on our ability to import and convert the existing eXtyle configurations into something that Typefi Orion can deal with. So we've started that work.

(23:35):

We've been working on it for a while in the background in terms of planning, but we actually started the work since the last roundtable now that the actual foundation of Typefi Orion Compass is done. And there's definitely some things we already ran into where we had to rethink some of the ways that we originally thought this was going to work. So I wanted to take a moment and talk you through a little bit about how we envisage this transformation or this transfer of information going and where we're currently at and some of the decisions that we've made along the way in preparation for January when, well, for the private beta, but also for January when we start going public.

(24:24):

So one of the very important things that we're going to be doing is we need the existing eXtyle configuration or at least portions of the existing eXtyle configuration. We need those in order to be able to allow us to do our magic that will make sure that you can use Orion with as little effort as is humanly possible. And so one of the things that you're seeing here is a little peek on the Typefi Server. So our file store, the place where the information is stored. And what you can see here is that we've, again, WHO is gracious enough to allow us to use some of these files for the demonstrations and as well as providing us with their configuration file. So this is something that we're going to be able to upload and by we, I mean one of our consultant is going to be able to upload to the Typefi file store. You can see the config.ice file as well as what we are calling Publication Groups. This is not the term that it used to be called under eXtyle, but this grouping of publications into a folder so that it's easier for the end user to pick a publication. So this is the entire, sorry, I should not lie. This is not the entire eXtyle folder structure, but these are the most important files from the eXtyle folder structure. Am I saying that right, Robin?

(25:59):

Robin is hunting.

Robin (26:00):

Sorry, I was muted. Looking for the unmute button. I only ever use Zoom nowadays for these and for an online quiz I do. It was starting to forget where things are in Zoom. Yeah, that's right. Yeah, so they were called publisher directories, whatever, publisher director.

Guy (26:14):

So when you can see here is that there's made sure that we can upload the entire, all the specific file extensions that were unique to eXtyle, that we can upload those to our Typefi file store so that they're available for our subsequent processes to deal with. And what we're going to be able to do, you need to make sure that when we're doing this process, you need to provide us with these files. I believe there is some interaction that's going to need to happen with Wiley / eXtyle in terms of intellectual property and all of that can be taken care of with our sales team. But once you provide us with the eXtyle configuration files that we need, we're going to upload them here and we're going to make sure that we can traverse them and import the necessary files. Now one of the things that we have found since we started this process is that certain things are in areas of eXtyle that we don't have access to.



(27:20):

So part of the things that we're going to need to do is we're going to need to get some details from you ahead of time. And the way that we've chosen to do that, which I think based on talking to private beta people as well as ourselves internally, is an Excel spreadsheet. So what you can see here is we've got an Excel spreadsheet where we've got a couple of columns with information that should be very, very easy for you to grab and to provide us. That was not easy for us to grab from eXtyle either, because like I said, we didn't have access to the files that this information is stored or it was made up of, it was information coming from multiple sources and therefore a little bit challenging to combine into one thing. So each of you that's going to be choosing for Orion, you'll be provided with this Excel spreadsheet to fill out with the details such as the publisher if necessary.

(28:25):

If you want to use publication groups, that's an option as well. If you are like in WHO, they are currently using those folders. So for them it's required, otherwise we won't be able to import the things in the expected manner. The publication name, stuff like the journal ID, print ISSN, electronic ISSN, the abbreviation(s) if you've got multiple, and the article types for that publication. So this file we would provide you, you would fill it out and you would give it back to us. And then we're going to make sure that when we are setting up our publications, right now we've chosen, because we've already made Robin's life hard enough the last couple of days, we've chosen to not add the button, but there's going to be a button here that says import publications. And you're going to be able to, by you, I mean you yourself if you are an administrator, or one of our team if we're doing this on the cloud on your behalf, but we're going to be able to take this Excel spreadsheet, we save it as a CSV file and we're going to be able to upload that.

(29:34):

And that is automatically going to populate all of the publications that are available. And if there's publications in a publication group, we're going to make sure that they're organised in the right way. That is the very first step that we're going to be doing as part of the import because having the publications and the journal IDs and all that other stuff is vital information in order to be able to then automatically take care of the next steps. So once that's done, once the publications have been imported and the team is working hard on completing that work, the other area is going to be that there's going to be, right now this is already all populated. This is an environment that's not completely clean, but in a clean environment you're going to have under the article types and the document metadata and the style configuration and the cleanup, anything that we can import, we're going to have the warning icons to indicate that there is something for you to import.

(30:33):

There's going to be a big import button. Again, I'm talking about this from the perspective of this happening on our cloud. So in our cloud, one of our IT team would take care of this, but if you were using Orion on premise or whether that's in Desktop or Workgroup configuration, one of your administrators would be able to go through and click the buttons that says run the conversions. And we would make sure to take the article types and the document metadata and any information related to the styles and the cleanups from the eXtyle configuration file. And within a matter of minutes you should be good to go. So that's a little bit of a peek behind the scenes. This is very much a work in progress. Sorry, my dog is making some very weird noises. And in our next roundtable, I am very sure that I'll be able to show you a little bit more of this in progress. That is it.

Caleb (31:56):

All right. Stop sharing. We'll switch back into our roundtable.

Guy (32:15):

Oh, thank you Luciano. So we need the languages in that Excel spreadsheet as well, Robin?

Robin ([32:21](#)):

Yeah, so I was slightly confused as to what Luciano, what you thought might be missing there. If you need to specify what language each of the journals is in, we can certainly add that. Typically that's grabbed from the document information dialogue in eXtyle. But if you are thinking about, and this is again not something for 1.0, but we're also looking at language localisation more generally. So that for example, you can use Word's proofing language for Orion to detect what language text is in. So if you wanted say SmartReplace rules to run on only on Portuguese and not on English text, you wouldn't need to, the fact that that was the language in the Word file would be sufficient for Orion to detect the language. We haven't built that yet, but that's definitely on the roadmap. But if there are other things you're concerned about, maybe language localisation, like changing, I dunno whether you were thinking about changing the names of things on the ribbon or if there are other things you're concerned about with language. Yeah, definitely let us know.

Caleb ([33:27](#)):

Well, he had flagged earlier around being able to edit the messages that were written into the comment.

Robin ([33:33](#)):

Right, yes.

Caleb ([33:34](#)):

He has a set of duplicated processes so that those comments are written in Portuguese. And that makes sense that you want to, there are many times that I myself am using Google Translate or something to try to write a message for someone that writes to us in a different language for support. I try to respond to them in their own language, but I again apologise always for the translation that I have control over. But yeah, no, I get that. I think we should have offline conversation to get some more detail on that one.