

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

Your hosts today, same as always, myself, Caleb Clauset, VP of Product. I've been with Typefi now for just over 20 years and it's just been a really exciting time spending time with you, spending time with the software, and getting it to the point it is. And joining me are Guy and Robin who are working with me as Product Managers for different aspects of Orion because it's not just one thing, it is a whole collection of different technologies and applications to deliver what we think is a really great solution for this. So the theme for today's roundtable is just to give you an update on the roadmap, progress, and also on the beta that's been running in the background behind the scenes. As I have been doing pretty much every single roundtable recently, for people that are just joining, what Orion is at a glance is it's a drop in seamless replacement for eXtyle. And what that means is that we're leveraging the technology we've been using for 20+ years in Microsoft Word authoring and editorial, but we are repurposing that and extending it and augmenting it around scholarly publications, standards, and so forth. A big part of this in our sort of mission statement for Orion is that we want it to be a drop in replacement. We want there to be minimal disruption. That you can be using eXtyle on a Friday and come in and transition to Orion on the Monday. And what we're even doing with our beta is we have people that have eXtyle and Orion installed at the exact same time. So there's, the goal that we've tried to deliver is to make it as familiar and easy of a transition as possible.

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And a big part of that that Guy's going to talk about is this integration or import of your configurations from eXtyle. That we can pull so much of the data from eXtyle so you don't have to reinvent the wheel, you could just bring it in and continue using it. You have the ability to augment or enhance that further, but for the most part you just import and away you go. So from the milestones and where we've been doing and what we've been doing over the last several months is just building out and fine tuning the software. And so thinking back to the middle of the year, we did an end-to-end demonstration sort of high level of, we can start with a Word document, we can go through the tagging and clean up with some Auto Redact. And doing the reference processing using the Edifix service, which actually goes above and beyond what eXtyle did, provided by the same backend solutions with Crossref and PubMed.

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But the addition of Cabells and the Retraction Watch and so forth. Where we are now, into November, is that sort of final polishing stage. We are getting ever closer to a GM release to QA, finalising documentation, finalising our plans for this launch in December. So one of the things I shared, I've started to share as part of this idea of openness is our burndown chart. And so this is showing the progress that we're making on the backend. The blue line represents sort of our understanding of the task at hand. And the interesting trend you can see here is that blue line keeps getting bigger, recognising that there's more to do. The purple line is what's left to do. And so the distance between those two lines is what we've accomplished. So at the last roundtable on October 22nd, I had shared this and I'd thrown in a trend line, sort of prediction, which sometimes can get you into trouble if you don't stick with it.

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And so here is the update and I'm pleased to say that trendline actually was too conservative. That even though our effort has continued to rise of what we need to do, that we have started accelerating as we get closer and closer to the end. So that's a really exciting thing for me to see from a product perspective is that this goal of being able to deliver this to you by the end of the year is getting to be closer and closer to reality. So I'm going to hand things over to Guy to sort of talk about the import process and maybe some of the lessons that we have learned in the beta that's been running in the background.

Guy ([05:46](#)):

You can just leave this slide on because I'm not going to share my screen because I don't want to, the only thing I can share is beta customer data and I don't want to obviously put beta customers on the spot. So

this will be mostly text. What I can say from the experiences that we've had with the beta so far is that we ran into some technical issues in the first couple of days when we started the beta with the conversion due to, not completely unexpected, but still you don't know what you're going to run into until you actually have different customer data. So we had some things where when we actually got some samples from multiple different customers, we were like, okay, those are variations that we didn't expect and didn't think about. So we needed to make some small tweaks here and there in the architecture that we had for the import and deal, to make sure that we were able to import the things that we needed to import.

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Some things like the document metadata required a little bit more work. Others were fairly trivial to do. They just took a little bit of brainpower from our engineers to make sure that we account for the exceptions. And one of the things that we found that was one of my concerns that I had hoped to either see confirmed or denied, and I'm glad to see it was denied mostly, is this idea of where things are. Robin was adamant that the structure of the eXtyle configuration folder would be consistent across customers. And with one exception, it has been. It is not completely unexpected that long-term, long-term, talking about decades old eXtyle customers might have some things in their import files that are slightly different to, things may not have been as structured 10 or 12 years ago as they were now. So I'm happy to report that with the work that was done, the actual import, my goal was to make it magical.

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It's something that most of you are never going to see because most of you, when you start with us, you're just going to jump into Orion. You might not even see the import process. So it's one of those things where how smooth it's all going, it's like most of you will never, except for the ones that might be running it on premed, nobody will see how magical it is. I'm sitting here clapping, being all happy that it's all working and almost nobody's going to see it. But sometimes like with theatre, that is just one of the things that is very important, all the background sets. What we did run into is some minor, some minor huge human differences. The fact that a lot of the eXtyle configuration is editable by human beings means that human beings don't always do the same thing when they edit the same text file.

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So we've had to take into consideration when importing, some manual tweaks after the fact were necessary. A prime example, one of the beta customers in their import of the paragraph style configuration they had, apparently in eXtyle you can disable styles from appearing in the styles palette by commenting out the specific styles you don't want to see in the configuration file in the backend. So we were all of a sudden having paragraph styles being imported with hashtags in front of their name. So we're like, huh, that must not be what we want. But luckily the fact that we've got the Typefi Orion Compass UI, it is trivial to go through there in the UI and delete the files after the fact. And obviously we've now updated our, so everyone that is going to come after this beta, we now take into account that paragraph styles that have a hashtag in front of them are not imported so that you don't have these styles anymore. So little things like that where human beings are going in there and some of these minor details about the import are things that we're now tweaking and making sure that for the first batch of customers that's going to be onboarding in early 2026, that onboarding process is going to be even more magical even if you don't see it.

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And I think the other part when it comes to the beta, the feedback so far from our customers that have been working with it in terms of the styling and those things, like they appreciate the fact that it does work very similar to eXtyle. One beta customer is actually a shared customer. Part of the company has never used eXtyle before and is actually using this as a testing bed. And words like "intuitive" and "easy to use" did drop in those conversations. So those are all things that we are very happy to hear for those customers that were brave enough to join us in this beta. And a lot of what the teams are working on now

is within that world reprioritizing some of the things that we feel are important to be in there for the 1.0 version in January versus things that will come in the first months of 2026.

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One of the things that absolutely came out of the beta is that our publication group, our implementation of publication groups, so this idea of putting together multiple publications. I'd made some, well some errors in judgments in terms of how that would work, and that's something that we're going to need to redesign, but that's not going to affect anybody that's currently prospecting to start in January. The customers that do use this currently are all scheduled for later in the year, at least tentatively currently based on the conversations. So yeah, from the Typefi Orion Compass side of things, from the backend configuration side of things, the results so far after these weeks of beta have been very, very promising. We've got a very solid foundation to work from and we're really looking forward to making this go live in the first month of 2026.

Caleb (12:50):

Awesome, thank you Guy. Let's switch over to Robin and we're going to spend some time with Robin and have some questions for the whole crowd at the end.

Robin (13:05):

Thanks Caleb. I will share my screen. I'll be brave enough to do that though I, share screen two. So you should see this familiar, very familiar Word document by now. I'm not going to show you much, not much has changed here, but just I'm just going to run SmartReplace for a second and then I'll just show you that now, everything here is pulling data live from Compass. So when we've shown some of these functions before, it's been using things like hardwired parameters, which obviously isn't practical for multiple, when we have multiple different configurations in play. But it was okay while we were just demoing. But I'm just going to run the SmartReplace functionality just in case anybody hasn't seen this running before. And the configuration I've got on here is essentially the same as what used to be, if you're familiar with eXtyle JATS, which was the kind of off the shelf version of eXtyle that didn't really allow any customizations. And as part of that you've got some extremely basic Auto Redact. It didn't even have its own button on the ribbon in eXtyle. It ran as part of cleanup. But so this is doing that and you can see some of the things that have happened in the file showing me that non-breaking spaces have been converted to regular spaces. This was done as part of this cleanup file. And also something which again, those of you maybe if you were familiar with eXtyle, eXtyle had a...might even be able to show it here.

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Okay, no, I don't want to accept all my tracked changes. I won't show it to you. There you are. eXtyle couldn't run with tracked changes. So it couldn't handle that fact that Orion's just put a load in. There was a function in eXtyle cleanup to remove the spaces between numbers and percent. And if you spoke to anyone at Inera, to Liz, everyone was kind of unhappy that that was still part of cleanup. It's not really a cleanup function, it's more of a Auto Redact or SmartReplace function. So now we've added this to as part of SmartReplace. So actually now any customers, if you had that set in your cleanup.ice file when you moved over to Orion, now we will automatically add a rule to your pre-edit or to this very low level SmartReplace functionality to do this as part of SmartReplace instead of doing it as part of cleanup.

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So you can see that this rule, rule one in percent space cleanup, has fired here to remove the space between the numbers and the percentages. And again, this is showing you, I can tell exactly, again, we spoke before about if you want to debug the rules or if you want to find out why some change is happening or something you've tried to do isn't working properly, you can see exactly which rule has done it. So that's just showing you SmartReplace. Also to show, so we looked at the Advanced

Workflows menu before and I've showed you those running, but just to show, you can see here now we've got these five on here, but if I now want to add another one, I can go to Compass, I can add a workflow, I can select, I want to add this export pre-flight workflow. I select that, I save on here.

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I come back to Word. At the moment, it's just showing those five. If I just, a bit similar to how you used to eXtyle, if you did update document information, sometimes to pull in the styles again, if I hit update now, okay, that's fine. And now I can see now I have my export pre-flight workflow showing on the menu. So no smoke and mirrors. It's really happening in real time. And if I was to run this, now you get the export pre-flight workflow, which we showed before about parsing out the authors and the affiliations and so on. I'm not running any of the others at the moment. Again, part of the joys of live demo, now we've plugged these things into the Compass, we discovered that a couple of parameters have changed their names from when the code was originally written to what they called now. So we're just doing some updates today to some of those XSLT transforms so that they run with the live data coming from Compass. But yeah, just a couple of things that have changed that we wanted to show you from today. I think really that was all I had from on the Orion for Word side.