Caleb (00:00):

Well, thank you all for joining us. This has been a bit of a pause, I guess, since the last time we had a roundtable, and I'll get into that in a little bit. But for those that are new to this format, this is something that we started early last year as part of the lead up into the launch of Orion in December of last year. And I wanted to just start with a little excerpt from a presentation that I did at JATS-Con earlier this year talking about this development process of what we did. And I think it's nice in a way to dive into this today when this is effectively the one-year anniversary of when we first did a public unveiling end-to-end of Orion at the CSE conference.

(01:13):

And so this slide I put together for that JATS-Con deck, a couple things to talk about here from a timeframe perspective, 492 days is the headline to go from when we started to the launch of Orion one at the end of last year. The green line that you see there is just the frequency of commits into our GitHub repo or repos and so forth. And I think the thing that I want to build on is that even though I haven't updated this slide, that trajectory that you see after December 17th, that upward line and that sort of higher peak, that has continued and we have been sustaining that across the board. Now, one of the things that when we started on this project of Orion, one of the decisions that we made was that we were going to build this much more in the open than we've ever done.

(02:30):

And there were a number of reasons why we made that decision. A big part of it is the engagement that we have in these roundtables and with you, that you are guiding us towards what you want as opposed to what we assume that you need because I think that gets us into dangerous territory when we start making assumptions and building things on spec as opposed to things that are actually in use and desired in your workflows. And it keeps us a lot more honest about what we're doing because trying to replace eXtyles, it's a big task. And I think that is sort of borne out in a way with some of the burndown charts we shared in earlier ones that you could see the burndown chart. And I'm pointing at something that's not there, but that burndown chart, the effort just kept going up as we got further into the project.

(03:38):

And normally you would think a burndown chart would go down because you start with a good scope and you just execute on that. We started with the scope and we kept realising, "Oh, this is more complicated. There's more nuance here. There's more detail here." And it was kind of an exciting and stressful time for us.

(04:01):

And this is a funny little Buster Keaton video that I think epitomises this can't stop, won't stop sort of attitude that we see things in front of us, the trains keep coming and we just have to get it out of the way just in time. And so that sort of got us into that 1.0 launch in December of 2025. So what has happened since then? First off, we have a nice set of early adopters that have signed into using Orion. This covers a gamut of different types of users, some in the book space, most in the journal space, lots of different places, also in the standards as an early adopter. Another big thing that happened is that Typefi has acquired Edifix. And so not only are we replacing eXtyles, but we now own Edifix as the backend. Edifix was already powering the way that Orion was doing references.

(05:10):

Now that gives us greater opportunities for integration and synchronisation, and we don't rely on someone else to fix things any longer. We can fix them ourselves. And we have plans for Edifix. We have plans to grow it and to add additional resources to it. So it's not just about checking PubMed and CrossRef, but we're going to add some other stuff to it in the future. So keep an eye on that sort of space. I'm going to stop talking now and I'm going to hand it over to Guy to talk about Compass, which is our backend administrative tool for controlling what the look and feel is within the Word experience that Robin's

going to show. And he's going to talk a little bit about how we support both journals and books now in the latest version of Compass. So I'm going to stop sharing and hand it over to Guy.

Guy (06:18):

Thanks, Caleb. I am going to start my screen share. Let me know if you can see my screen.

Audience (06:33):

Yep.

Guy (06:34):

Excellent. Thank you. All right. I'm just going to move something out of the way that you can't see, but that is ... All right. So brief look back at Typefi Orion Compass and where it comes to from for those in the room that might not have seen any parts of Orion before. Typefi Orion Compass is built on top of an existing product that we already had, Typefi Server that was working very well for our InDesign automation-based customers and saved us a lot of time not needing to rebuild something from scratch. So what you're seeing here is the Typefi Server side of things, and this is primarily a file store and a place to host plugins and workflows. And some of the things that Robin is going to talk about shortly when he demonstrates some of the features that him and his team have been working on.

(07:33):

But what I've done here is I've started an ACME configuration, so this is an existing customer and an existing eXtyles customer. And one of the things that we wanted to try and make sure to do with Orion is to make sure that existing eXtyles configurations can be imported because we wanted to make sure that you didn't need to start from scratch. We wanted to make sure that the barrier to entry was as low as possible. So I've gone ahead and I've uploaded an existing eXtyles configuration to my locally running Typefi Server component because that's just easier to demonstrate with. And then I'm going to go into Typefi Orion Compass. So what is Typefi Orion Compass? One of the other challenges that we saw in these roundtables is the distribution of eXtyles. Every customer had their own customised installer, all of that needed to be managed.

(08:33):

And that's one of the things that when we talked about this in the early days was we don't want to do that. We don't want to have to manage the same installer for every customer and have multiple installers. We wanted to make sure that we had a centralised environment that an administrative user at the customer could control and could update centrally, and that all the clients, whether it's one or 50 Orion for Word clients, could all look at this centralised server and grab the latest information. So that is what Typefi Orion Compass is. It is a centralised management environment for configurations. Right here, I'm starting completely from scratch. So I'm going to click new configuration here, and one of the first things that I can do is I can pick from a list whether I want JATS or BITS. So previously we only had JATS, and now with the upcoming 1.3 release that is scheduled to go out publicly by the end of this week, we are now also able to support BITS.

(09:41):

So I'm going to start with JATS just because everything that I've previously configured is for JATS, but Robin will show you later this configuration running on BITS. So I'm going to go ahead and click next and I was going to say, what did I do? So I can go ahead and click import configuration and I can go ahead and grab a CSV file that I've previously saved with my configuration and make sure that contains some details that we'd previously gathered around metadata and that kind of thing. And then when I click next, we can see that there's a couple of publications that have been added. And in this case, it's an entirely new configuration, but if we wanted to, we could also have created one with an existing eXtyles

configuration. So right here, we've got our global settings and that controls everything that we need to ... So right here, we've got a configuration that I've uploaded previously, so I can go ahead and say import configuration, and that is going to load all the article types that were coming from the eXtyles configuration.

(11:05):

And the same goes through for document metadata. I can click import configuration and is going to import all the document metadata from the existing eXtyles configuration. One of the tweaks that we've done between version 1.0 and 1.2, upcoming 1.3 is that we did a little bit of tweaking around the UI as well. So there were just some things, because we were pretty fast in making sure that we released that 1.0 version, not everything was properly aligned. There was a bunch of things that we wanted to clean up and we've gone ahead and done that. So going through this, I'm not going to go through every single configuration around here, but there's a whole bunch of things that are configured here. I'm going to discard these changes that I've made so far, and that's one of the new features in the upcoming 1.2 as well, making sure that you have control over whether you want to save something.

(12:02):

Previously, we just saved all the time. Now you've got that little bit more control. But the most important thing around Orion Compass is that everything that you control here, the Orion for Word client looks at it, reads it, and you have one central place where you can make changes that are available to all the users. But one of the other things we also wanted to make sure is that we had control. So what you'll observe here, I'm just switching to a different environment that also had Compass configured. On this particular environment, I am not defined as an administrator. So rather than being able to make changes, here I can only view a configuration. So I can see what is available to me, but I do not have the permissions to actually make any changes. So that's one of the things we wanted to make sure to give you control over the things that you do.

(13:07):

So in terms of BITS, let me quickly go back here and I'm actually going to remove my configuration and actually do a new one for BITS because I just wanted to make sure and show you that that works as well. So I'm going to just delete this configuration real quick and double check that. Yes, it's gone. Yeah, that's gone. So if I go ahead and create a new configuration, this time I am going to pick BITS and we're going to click next and the procedure is roughly the same because even though there's obviously some details around the exporting of BITS and the kind of metadata that you're using, but from the perspective of the kinds of things that you need, I'm glad you're excited, Debbie. We're excited too. So import publications going to follow the same process. In this case, I had a CSV because the requirements for metadata are slightly different for BITS than they are for JATS, there's less requirements.

(14:13):

So we also have some different things that we can work with in terms of the CSV files that might contain the details that you need. So we're going to go ahead and click next. There's three publications here, create the configuration and we are done. Now, this is a default configuration. We are still working out the details for what a default configuration is going to be. Most of the existing customers that have expressed interest in BITS are existing eXtyles customers. What I mean by that is now you'll see that if I go to document type, that it doesn't load anything default yet. So something for ... And in the future, we will work to define what does a default BITS configuration look like in the same manner as we've got a default JATS. But for right now, our priority was focusing around the customers that want to use BITS and that have existing eXtyles configurations, of which there are a few that are lined up.

(15:16):

Now, once you've done this, and I'm only going to show the high level stuff because I'm going to hand this over to Robin, who's the expert in this, but as product owner for Orion for Word, I've worked closely

with the teams building this. So from Orion for Word ... Oh yes. Oh, I completely forgot. One of the things that we have added in 1.2, I was so excited about BITS that I completely forgot about it is Insert Tags. So Insert Tags was not yet there in the 1.0 version, and now with the 1.1 version of Compass and Orion for Word 1.2, we now also have support for the Insert Tags feature from the Compass and from Orion for Word as well. So let me switch back to Word. So in Orion for Word, we're actually, currently the version that's going to be released with BITS support is going to be 1.3 of Orion, and in there we've got the Insert Tags menu as well.

(16:25):

Let me first double check and make sure that I'm connected to the right environment. I think I'm connected to the dev environment and that is fine and that is fine as well. I can still ... I'm connected to a BITS configuration that I have created on one of our internal cloud servers instead of locally on my desktop. So when I click publication, you will see that now I am able to pick some very insightful book titles. I'm going to just pick the one that has everything about everything in it because that sounds like something I'd be interested in. And from the document type menu, so rather than an article type for the JATS customers, we've got document types, so I'm going to be working on a chapter and I'm going to attach it. So the experience is the same for JATS or BITS, but catered towards the BITS customers, we're downloading the template from Compass, and soon we will be able to actually work on this project.

(17:34):

That's it from me. I am going to stop my sharing and where is the stop sharing? I can pause, but oh, there it is. Sorry. And I am going ... Are there any questions around Compass and what I've demonstrated so far? If not, I don't see any in the chat either, so I am going to hand it over to Robin.

Robin (18:03):

Thanks, Guy. Let me just share my screen. I should say, as well as it being the first anniversary of demoing Orion at CSE, today is actually the first anniversary of me starting work with Typefi. I actually joined on May 1st, but because of the holiday today, May 6th was my first working day, so a year today. Okay. So you can see my screen. I'm showing the same Compass view that Guy was just showing. We've got our publications here. As he was saying, obviously the metadata requirements around books are a little bit different from journals. I can see I don't have admin access on here, but I can show you that we've got a print ISBN here, and we've got a publication abbreviation, which is not required. In the sense with journals, it's required to have an abbreviation, but obviously depending on the types of books that you publish, if you publish in a book series, an item in a book series, maybe you do have an abbreviation for that series, but if you're publishing standalone books or other types of material, you don't need that field.

(19:09):

Likewise, you might not have ISBNs or you might have multiple ISBNs. So coming down the line, you'll be able to add extra metadata fields here so that you can capture exactly whatever. Maybe you've got a separate ISBN for an eBook versus the print version versus, I don't know, a DAISY version or something like that. So if you've got multiple ISBNs, you'll be able to capture those here for a particular publication. Likewise, if you don't need any of that metadata in here, you don't have to capture it. Say you're only publishing, it's a chapter at a time or something like that. And you may even have, again, thinking about people who are already using eXtyles for books, sometimes you might just have a single publication type here, which is like chapter or something, because obviously if you are publishing standalone books, then each one has new metadata.

(19:56):

ISBNs are unique and you don't want to be storing them in here and having to come in and update them each time you want to publish something from a new book, you'll gather that metadata in a different way.

But so that's the Compass side of things. And as Guy was showing it, likewise, very much similar to what you've seen for the journal side of things, if you've already seen some of that, same functions along here, Insert Tags is available. We've got some document types. It's not fleshed out completely in this configuration yet, but otherwise there's a lot of similarities to what you've seen on the journal side, but I'm going to spend a little bit of time. Again, this will be old news for some of you, but again, some things have been improved on the journal side of things as well. So I just ... Here we go.

(20:47):

So I'm just going to run through the similar demo to the one we've got previously. So just going to attach my metadata. You can see I've got my various pieces of metadata here, and you'll see later on when you get to the XML stage of things that they show up in the XML now. Metadata view, similar. I guess I add some page numbers here.

(21:15):

And one thing to bear in mind as well, if you've previously, again, for the eXtyles users in the room, if you've been processing a file with eXtyles and you bring it into Orion, you might, as you see, the article ID shows up here. It depends whether if the metadata name is unchanged and the metadata was stored in the eXtyles file, you should still see it showing up here and it'll still go through to your XML. You won't have to even enter the metadata again for a particular file clean up. I don't think much has changed here. We have these various elements of document cleanup that Orion does at the beginning of the process to essentially get rid of noise that is not required in an XML file. So for example, blank paragraphs have been added just for padding purposes. We get rid of those because they don't have a meaning in an XML file and just making sure it wasn't trying to find my printer.

(22:13):

No, it's not. It looks like it is running. Okay.

(22:19):

And the changes have tracked, which again, a key difference, as we've said before, from eXtyles that you don't have to rely on the baselines that eXtyles created to check what's happened. Maybe I selected all the options. Oh no, there we go. We're finishing off now. So you can see we've got my track changes here, my blank paragraphs. I've got some spaces deleted from the end beginnings ends of paragraphs. I'm just going to click accept all those changes before I move on. Style paragraph, a few things have improved on here. Again, if you've had any experience or seen a demo of the earlier versions of Orion, this didn't happen. I can now just use the tab key to circulate through all the tabs. Previously it got stuck. I think once it got to the end, you had to back tab to go back again, but now it carries on going around in the same way that eXtyles did, if I just blow this up a little bit.

(23:19):

So yeah, same behaviour here that you've seen already. And I can, again, use the keyboard if I want to. Correspondence, history here, abstract here.

(23:31):

I will also show you that. So that's all done. If I scroll down here, something I think that we mentioned previously as well, that the separate undo history, and again, if you've been in one of these demos before, you might've seen this, but the separate undo history that eXtyles had for the palette compared to Word, that's gone away. So if you do an undo from here, it'll undo what the palette did. Likewise, if you undo on the palette, you could undo what Word's done. So these share undo history now, if I scroll down to the table here, and if you remember from eXtyles, if you're familiar with that, if I hold down the shift key, hit table body, it styles everything else on the table, and now correctly it goes to the paragraph immediately after the table. In previous version, it skipped the first paragraph on the label that's been addressed.

(24:20):

So otherwise, yeah, the palette is pretty much identical from what you're used to in eXtyles.

(24:31):

SmartReplace, again, we've been busy with a lot of bug fixing. One of the things, again, as we've mentioned previously, SmartReplace, unlike AutoRedact in eXtyles, supports track changes, you'll see in a minute that the changes it makes show up as track changes. There's an option. If you don't want to see a change tracked, you could switch that off at a per rule level, if you like. But that does, and I think this is one of the reasons why Inera never pursued supporting track changes. It does make things much more complicated. So the engineers have done an amazing job of figuring out how to track these changes when in some of our testing, you'll see a paragraph that's had maybe 25 different rules make changes in one paragraph. So there's a lot of rules going on here, something like three and a half thousand in this implementation rules.

(25:22):

So sometimes the same paragraph or the same piece of text can get hit multiple times. You get build up of multiple changes. So it's a complicated process, but this always takes ages. I think when you're screen sharing to show the changes, but you'll remember from previous demos, I think that the tracked changes are identified by particular rules. So it'll show you exactly which rule made each change. We've got some UK English to US English spelling changes here. Eagle-eyed people may have seen before in earlier versions, there was a bug in this table cell down here, where the text got a little bit mangled, and now we've addressed that. So we're correctly removing the non-breaking spaces here, replacing them with the regular spaces. So SmartReplace, not a huge amount has changed from this on the surface, but actually if you looked at the, Caleb showing the number of commits that have been made to the code, if you looked at the number of changes that we've made, it's really a lot more robust in 1.3 or version 3 of the SmartReplace plug-in compared to the earlier versions.

(26:34):

That's SmartReplace. Again, I'm going to accept those changes before I go on. There we go. And run SmartReferences. And now again, if you've not been in one of these demos before, perhaps a little while since you've seen this, this, as Caleb mentions, is leveraging the Edifix functionality. So we are identifying the references in the document. We're taking that piece of the file, we're sending it off to Edifix, and Edifix is doing what eXtyles also would've done. So parsing out the references into their individual pieces, identifying what type of reference it is, and then also checking the references against PubMed, against CrossRef, against Retraction Watch, and also against the Cabell's Predatory Journal Database, which those latter two are not available within eXtyles, only through Edifix. And one thing you'll notice when the job finishes and it does, I'm afraid, always seem to take longer when you're sharing your screen than when you are running it directly.

(27:39):

Hopefully it won't take too long, a couple of minutes. You'll see that we've improved the way that we are containerizing these changes. So along with insert tags that Guy mentioned, and I'll show you what Insert Tags looks like in Word in a second once this is finished, we're actually ... eXtyles used to use Word fields. So again, if you used eXtyles, you'll know it used to put those angle bracket things around the edges of the references, and they were kind of quite complicated Word fields. If you ever looked what was inside those fields, you'll see there was a lot of noise in there, and they were a bit touchy. You could break an eXtyles document by inadvertently making changes to those fields. When we first, in the earlier implementations of Orion, we were just essentially treating those as plain text. So again, that was quite fragile.

(28:37):

You could obviously go in and change the text accidentally or thinking you were doing the right thing by hand. So now we've switched to using Word's content controls. Now, you may or may not have already

used these in Word. I'll show you them when it's finished mapping the references back into a file, which it's doing now. And essentially, it's a sort of container that Word allows you to put something in and you have to be a little bit more active to change it in some way. So you can't just accidentally overtype the reference, part of the reference tags or something like that. And similarly, we'll see when we get to the Insert Tags menu, again, instead of using those Word fields, we're using content controls again. A watched part never boils, as we say, in the UK. There's something else. Just check the chat and see what ...

Caleb (29:45):

Yeah, this is one of the first things that we're doing in Edifix is addressing some of the performance degradation from the way that it's interacting with CrossRef.

Robin (30:00):

Absolutely. And just to follow up on what's in the chat, so there was some conversation in the chat about whether you could style a single cell at a time and absolutely yes, you can. So again, and thanks Monica for jumping in there as well. As in eXtyles you can, I can't remember, I think it's the control key. If you hold down the control key and style inside the table, it just does one cell and then moves on to the next one. So as Monica says, for example, if you've got a list in a cell and you want to style it as using one of the list styles instead of just a regular paragraph, you can do that there in that way. Oh, thanks Cindy as well. Yeah, saying issues with CrossRef availability. I did actually run a test of this job about an hour ago and it, as always, when you're not running a live demo, it ran very, very quickly and was fine, all the CrossRef.

(30:50):

As I say, I think there is something about screen sharing that means that this always runs slower when you're screen sharing. I'll just scroll down and see how it's getting on. Okay, so it hasn't actually started pasting the references back in yet.

(31:13):

We'll see them show up as we come through. Yeah, I see. Again, referring to the discussion in the chat about table styles. Yeah. By default, Orion will, like eXtyles, will style the whole table row. But as I say, if you hold down, I think it's control. I think it's the same in Orion as it is in eXtyles and click a single table cell. It will just style that cell and it will go on to the next one. Obviously it's time consuming to do that. So if you don't need that functionality of having different styles in different cells in a row, then the default behaviour is much quicker. But obviously if you do need to style a single cell one at a time, you can do that in both eXtyles and in Orion. As say, the shift key just does everything else after, or even if you've got a big table and maybe the bottom row is a row of footnotes or something like that, it's still quicker generally to style the whole table as a table body and then just go back and individually style that last row as table footnote or whatever you're needing to do.

(32:27):

Yeah, this was frustrating. It's taking so long.

Guy (32:33):

I think it's almost worthwhile to open the file that you ran earlier to show the content controls.

Robin (32:39):

Oh, here we go.

(32:41):

Speak and you shall obey. There we are. So you can see a little bit all like the eXtyles tags that we're putting around. So these are content controls that are showing up here and ... There we go. So they're the sort of replacement for the eXtyles tags. And you can actually, there is a way you can go into here and you can actually edit these in theory, but generally you won't want to do that. You can delete them in the same way that you would with the eXtyles tags, backspacing over them or whatever. You can see here as well, I changed this reference list if you've seen this demo before, so that you can see now we've got a Retraction Watch warning here about this reference having been retracted. And again, something that eXtyles did as a separate process that was a paid for extra, duplicate reference checking you get with Edifix, that's thrown in as core functionality.

(33:47):

So this is telling me that reference 11 is a duplicate of reference 3. As I have done in previous versions of this demo, I'm going to delete reference 3 instead of reference 11, just for the purposes of showing you, I'm going to resolve those comments as well down there.

(34:04):

And I'll find it's the citation I've got up here and I will change the citation of reference 3 to the citation reference 11. Just for grins, as we used to say. So if we go back to Orion now. I'll run SmartReferences, so this is our current full set of the available advanced workflows. Most of these were available in Orion, sorry, in eXtyles, but most customers would've just had a subset of these, and some of them you may not even have been aware of, like fixed all caps and small caps. I don't think many eXtyles customers actually use that. If you've got small caps markup with capital letters in it, for example, it turns them into standard capital letters without small caps. If you've got all caps, it turns the text into genuine capital letters and removes the all caps markup from Word.

(34:54):

Duplicate affiliation checking is the one exception to that, which is a new feature that we've added, which looks at the affiliations and looks for either duplicate affiliations or duplicate symbols. So I'm going to run Convert and Clean. If I just had gone to Compass, I could show you that the selected style for this document is superscript numbers and you could see there. So I've got too many Word files open, I think. It doesn't sometimes like me doing that. Yeah, it didn't reopen my file after I ... I'll just close these for now. I'll reopen my file.

(35:54):

I'll just do that. Okay. I suspect it didn't bring back my output. So yeah, in Compass, I've got my selected style, which is superscript numbers, and you can see Orion has gone through and has changed the citations and has moved them relative to the punctuation. Citation matching, similarly, if you're familiar with eXtyles, you'll know what this does, but it's linking up not just the graphic citations, which I've got now showing up using the Cite Bib character style, but also if I carry on scrolling down, my figures, my tables, my boxes and so on. And I think as you might've seen before, you have ... Oh yeah, one thing to say at the moment, I won't be able to export to XML from this file because on this machine, I don't have the code that keeps the content controls in once I run another process on it.

(36:59):

We have this character style to start the captions as well, as you might have seen before. I checked my citation order. It's going to tell me that obviously reference 11 is cited out of order as we saw before. So yeah, sure enough. But also again, if you've seen the demo before, there's a citation of reference 2 here, which is cited in the caption of figure 1, and figure 1 is cited before table 1 is cited. So in this snaking style, you would expect this to be a citation of table 1, not a citation, not a citation of table 2.

(37:38):

And then I can renumber if I'm happy that ... Yeah, I know reference 11 is out of order, but I know why it was and that I know I've got to match up. Excuse me. The citation matching didn't show any actual

warnings between about the citations. It's just that they're out of order. So citation numbering will just automatically renumber my citations for me. And if I go down to the reference list again, now reference 3 has been moved up, what was reference 11 has been reinstated correctly. Here's reference 3. We have table footnote citation matching as well, which again is another workflow that perhaps not very many eXtyles users actually make use of. It really is, if you need your XML to have links between the footnotes and their call-outs in tables, then this functionality will be useful to you. This is telling me that there's a dagger here that's not cited because the table footnote actually uses a double dagger here and it's telling me that there's an unmatched footnote down here.

(38:39):

So actually I say, "Okay, that should have been a regular dagger, that's fine, all solved." And I run export pre-flight, which again, you might've seen this before. So the eXtyles author processing functionality, which just took care of the author line and basically made sure any affiliation markers had a matching marker in one of the affiliations. We've taken this another step, and so the affiliations are fully parsed out in the Word file rather than this being done downstream during XML export. Similarly, the dates here, the running structured abstract headings, the keywords, the abbreviations all parsed out here. As I say, I can't export this file to XML because I've lost the tags, but just to show you with the Insert Tags menu, if I go onto here, obviously I could put them back in, for example, by hand, and I won't do that because there's 11 of them, but I could go to here and I could say, "Actually, this is a electronic reference." And so I could put them back in using Insert Tags in the same way as you would've done in eXtyles if I wanted to change a particular reference.

(39:52):

But similarly, if I had to use one of the others again, so I can either select some text and it will put the tags around it. Or if I just have an insertion point, then some of these other tags aren't designed to take any text. So this would be used at the end of a table title to say this table is supposed to be landscape. So again, you'd be familiar with that from eXtyles. So there are some changes there.

(40:23):

I will go back to ... I've got that file later, but I've also got this file. So this one was processed by the old version of Orion, so it has the plain text tags on the end here. So I've got two exports here. I can either export to what we're calling our Orion JATS, and that's fully featured as granular as possible XML. But if, for example, if you want to go to PubMed Central, you don't need some of that granularity, but PubMed Central absolutely won't accept the granularity in the affiliations. They want plain text affiliations. So this transform to PubMed Central Compliant JATS simply does that. It takes our default JATS coming out of Orion and it just cleans it up to get rid of anything that PubMed Central doesn't need or changes things that PubMed Central doesn't want. You might be aware, for example, if the abstract title ... I just printed that up so we can see what it looks like.

(41:30):

In PubMed Central, if the abstract title is the word abstract, you have to remove it from the XML. If it's anything else, you have to put it in the XML, who knows why, so we are fully compliant with that sort of requirement. So you can see I've got my metadata having been pulled through here, stuff that came from Compass up here. I've got some document level metadata that was stored. In fact, the DOI didn't actually even show up, I think on the metadata dialogue, it was stored in the document from eXtyles, and I've got my affiliations and so on here. But you see here, my affiliations cleaned up in true PubMed Central style. So that's all available as my dates down here and so on page numbers that I added on the fly there while I was working on it. Abstract with no abstract title.

(42:18):

Okay. So that's the JATS export. Before I finish, I will just show you that ... I'll just close this one as well.

(42:33):

So this is a BITS document and a book, a report handled as BITS. If I just switch over server onto that one that Guy was showing you earlier on that has the BITS export and installed on it, you can see I've got my books and about stuff. I've got my information here with some ... Actually, we need to update these. I noticed this before that it's got the journal fields here. I'm sure we have a ticket for that already. And so I've got on here export BITS. And so I run my BITS export. And this very similar mechanism, we're going to a default flavour of BITS, which there isn't really, in a sense, the same standard as PubMed Central, which obviously a lot of people have this standard and eXtyles had its off the shelf, eXtyles JATS product that gave you basically a generic flavour of JATS.

(43:35):

And so that doesn't really exist. It certainly didn't exist in eXtyles. There's no off-the-shelf version of BITS that eXtyles generates, and there isn't really the same kind of industry standard in the same way. There is NCBI Bookshelf, but there isn't quite the same weight behind that in terms of everybody wanting this or a critical mass of people wanting the same flavour. So we've built our own default BITS, which is what this is going to export to. But again, similar to what I just showed you with the PubMed Central, if you said, "Oh, well, my BITS is kind of like that, but I also need this, this, and this doing instead." And I'm actually not going to let this run because it's running on a Dev server and it's a really quite a slow machine. So this will chunter away to itself and I will come back to here and I will show you ... This is the BITS XML, which will appear.

(44:31):

I promise you, I exported this about an hour ago. It will appear in here shortly when that machine finishes running. We don't have a doc type in here at the moment, but otherwise you've got your Book Meta or your authors.

(44:47):

I've got my abbreviations down here. Actually, interesting, the abbreviations haven't been correctly parsed out. There's some work to do here on the BITS, but this is the output that you get. So this is obviously a beta version of the BITS export running and more work to do on it still, but we are very close to shipping this out now with upcoming versions of Orion. I was just looking to see any steps that ... Oh yeah, you've answered Catherine's question about SmartReferences. Fine. And so I don't think I had anything else I wanted to show in this step, but if anybody had any questions or anything that was unclear, let me know.

Caleb (45:48):

All right. Well, let me just steal the screen again. Sure. And so we just talked about the past, the current, what happens next? Here's the window, what we're looking at for Orion over the next, well, through the end of the year. So for this quarter, April through June, the big marquee is exporting to BITS. In the July to September frame, it's exporting to STS, and we're hoping to be able to deliver Orion v2 by the end of the year. And you can see there's lots of little details in here. So one of the things that I think there's a question around the SmartRefs being able to toggle off and on and say, I want to do this to PubMed, or I want to do this to CrossRef. That's coming in SmartRefs v2, which will be delivered end of this month actually. And we've also added some other stuff in here around the Schematron, Schema DTD validation that'll all be shipping this quarter to integrate that into your workflows.

(47:11):

And this allows you to potentially run Schematron during the process. So instead of the eXtyles way of doing things where validation was a post-process that happened at the very, very end, and then you had to work backwards to try to figure out where those errors had introduced, that you could do this during the process. And so you could run Schematron rules, business rule validation as you are doing things. So in the same workflows that Robin was showing earlier under our advanced workflows, you could add QA steps into those individual workflows if you wanted to.

(47:54):

Other things that you can see in third quarter of this year besides the STS export is there's SmartRefs version 3, which will add support for your .refstra files. I'm just trying to pronounce this, but it's the eXtyles reference structure file. So if you have a custom format for how your references want that does not match with the way that Edifix produces it, SmartRefs version 3 will actually allow you to use that refstra.xsp file as instruction. And so we'll load that into Edifix. Edifix will then deliver you your references to that standard. So that's a nice little thing there. You'll also see at the end of that list for the third quarter is CrossRef and PubMed deposits. And so your metadata deposits, we can automate that with that next release that's coming in the third quarter.

(49:02):

There's lots of stuff more to talk about in future roundtables. We're going to kick this back into a regular cadence like we did last year, but I wanted to just open it up in general for questions in the last 10 minutes that we have. So let's see, looks like all the questions in the chat have already been answered. If you want to come off mute or show your face, happy to talk to you directly. If you want to throw it into the chat, we can do it there. You also should know exactly where to find Guy, Robin, and myself online. If you just want to email us something privately, we're happy to answer the questions on that side of things.

(49:59):

I think the only difference, Cindy, between Orion SI and eXtyles SI is I believe that eXtyles the SI stood for server implementation, and in Orion, our SI stands for service integration. But yes, the intention is that it meets the black box service side of things of eXtyles SI, but it's multi-threaded, meaning that you can run many jobs through in parallel as opposed to having a single job serviced at a time. That is a massive change from what eXtyles did, and that's just because eXtyles SI was single threaded and Orion SI is not single threaded.

Audience (51:05):

Yeah, that's awesome. That sounds great.

Caleb (51:12):

Any other questions?

Robin (51:14):

I was just going to ask a question and potentially answer it. I haven't discussed this in detail yet, but I'm assuming that Orion SI will not run eXtyles SI manifests, that if you moved over, you would need to set that up again differently.

Caleb (51:34):

That is correct.

Robin (51:34):

Just to be aware of that. I don't think anybody has thousands of manifests that that's going to be a massive overhead, but just something to be aware that it is completely differently architected. So any manifest you currently have would need to be set up as a new workflow in Orion SI.

Caleb (51:55):

Yeah, that is correct. So if you have experience using Typefi with the InDesign side of things and you're using our Rest API, Orion SI uses the exact same APIs. And so it is a JSON file that says, "Here is what I

want to run." And within that JSON, you can specify all the different parameters and rules and all that sort of fun stuff to deliver the output. The job shows up inside the Typefi Server jobs list, the exact same as a job that you run from within Word with Orion, and so you can see them both side by side.

(52:46):

So yeah, absolutely. You can rebuild the way that you're doing your manifests to now leverage the way that Typefi does it. We did it this way because A, it is a RESTful interface. It's using JSON in a way that should be a lot easier to work with than the text files that drove eXtyles. All right. If anyone's going to be at SSP, Typefi will be there in force, so we'd love to chat with you in person. And if not, we will see you on the next roundtable or at the next conference, and we're just excited to keep moving forward. So thank you all very much.

Robin (53:33):

Yeah. Thanks everyone. Thank

Audience (53:35):

Thank you.

Caleb (53:35):

All right. Take care.