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# Quick Start Guide

## Publishing Pipeline

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# Welcome to the 'Publishing Pipeline!'

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The quick start guide is for you to learn how use the 'publishing pipeline' for making multi-format publications: reports, manuals, books, and papers, etc.

The 'publishing pipeline' connects the word processor to publishing. What this mean for publication production is that from an online multi-user editor you can automatically create and typeset multi-format outputs – PDF, web, eBook, print-on-demand, and more – to file storage or live online. You can also make updates at any time across all format outputs from one single-source.

High quality layout designs are enables by combining pre-made templated 'layout design styles' with automate machine typesetting. This means that all the time-consuming layout design work is taken out of the production time-line and is done in advance, enabling a rapid publishing workflow.

The quick start guide is for contributors and publication managers. Technical administrator and developers, and typesetting layout designers, should see the 'Admin Guide'.



We'll be working with an online collaborative word processor and publishing to multi-format — PDF, web, e-book, mobile, print-on-demand, etc. — all using 'digital sovereign' open-source software and systems to ensure privacy and security, including: being self-hosted, GDPR compliance, and encryption, and more.

## What you'll need before you start

See instructions in the 'What You'll Need to Get Started' section of this guide for creating all the accounts needed.

### For contributors

Contributors will need the following.

1. An email address to receive account emails.
2. A user account with the online word processors 'Fidus Writer'.

## For publication managers

Publication managers will need the following.

1. An email address to receive account emails.
2. A user account with the online word processor 'Fidus Writer'.
3. GitLab or/and GitHub accounts, depending on which supported Git platform your using.
4. Connect 'Fidus Writer' to your Git platform of choice.

## Digital sovereignty

The term 'digital sovereignty' is used here to describe the steps taken to ensure privacy of personal information and the security of content. Privacy and security are vital because of the encroachment of digital activity by corporations and states, by parties with malicious intent, or through accidental data loss.

To ensure your 'digital sovereignty' we combine data security measures, adherence to privacy legislation such as European General Data Protection Regulation (GDPR), and readiness for privacy legislation of different jurisdictions such as the California Consumer Privacy Act (CCPA), as well as transparency of code and data storage.

The system can be self-hosted, is open-source, has full GDPR compliance, uses two factor authentication for admin areas, and OAuth authentication for authentication and authorization infrastructure (AAI) integration.



## Pipeline features

- Collaborative work space: invite designers, editors, proofers, or reviews to work on a publication.
- Multi-format publication outputs: website, PDF, paginated web, eBook, and print-on-demand etc.
- Automatic typesetting and layout design styles, so no time consuming typesetting.
- Single-source publishing: Make an edit and distribute to all formats.
- Citation manager.
- Open-source software and 'pipeline architecture' designed for system integration.
- Git storage with versioning.
- Interoperable formats: JATS/XML, JSON, HTML, LaTeX, etc.
- Semantic structuring and enrichment: Linked Open Data (Use of terminology services and TDM), publication level PID, publication internal structure and for digital objects.

## What you will learn here:

1. Account creation for Fidus Writer, GitLab including GitLab.com and GitLab CE, and GitHub.
2. How to prepare your public Git repository for storing your publication data, with an option to enable a website.
3. GitLab Pages and GitHub Pages website creation.
4. To setup your publication's online collaborative word processor.
5. Invite your team to collaborate on writing online.
6. How to publish.

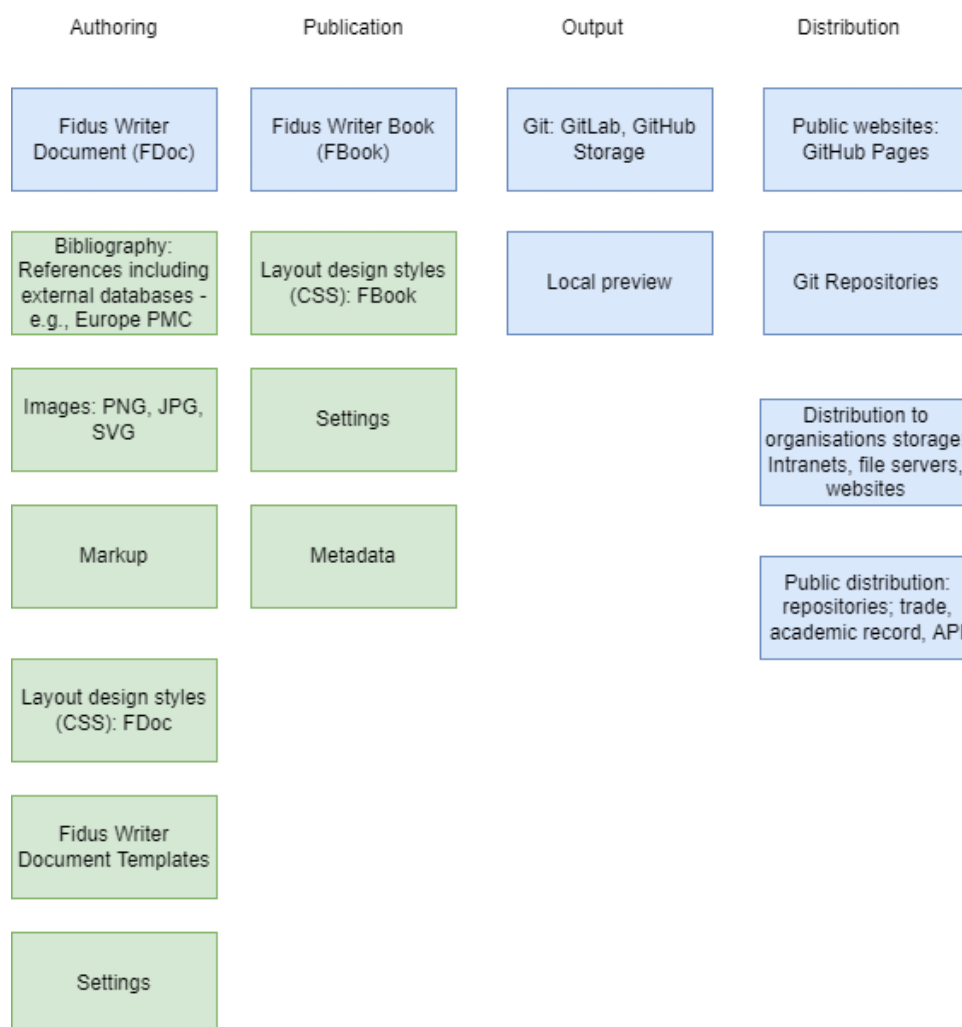


## The steps used to create a publication



1. Create a Git repository and website
2. Create a book (collation of documents)
3. Invite the team
4. How to publish multi-format
5. About enhanced publications

## Publication data structure



Pipeline data structure - DRAFT

## System configurations and setting

To find out about Fidus Writer, Documents, and Book settings see the guide section 'System Configurations and Setting'.

# Sections

## 12 | Quick Start Guide

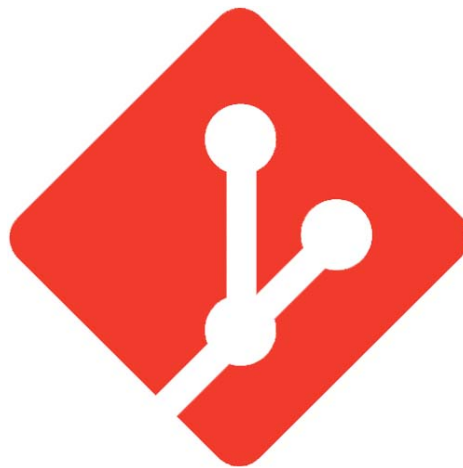
[illegible][illegible]

Example publication which is a presentation of the repository above

## About

The repository uses Git<sup>1</sup> technology which allows for versioning of your publication.

We save to GitHub and GitLab (Perkel 2016). GitLab can be used as GitLab.com or as a self-hosted instance for public and private publications, or for staging publications for later transfer to another repo. We use GitLab Community Edition (GitLab CE) for self-hosting which is open-source software. GitHub is not open-source but is useful for publication distribution and visibility.



Git logo



Octocat: GitHub's mascot

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**1.** Git is open-source software that both GitHub and GitLab are built on – think of it as a 'time machine for code' and all that could do.



GitLab logo

## Step-by-step guide

These instructions are for using GitHub. The principles are the same for GitLab.

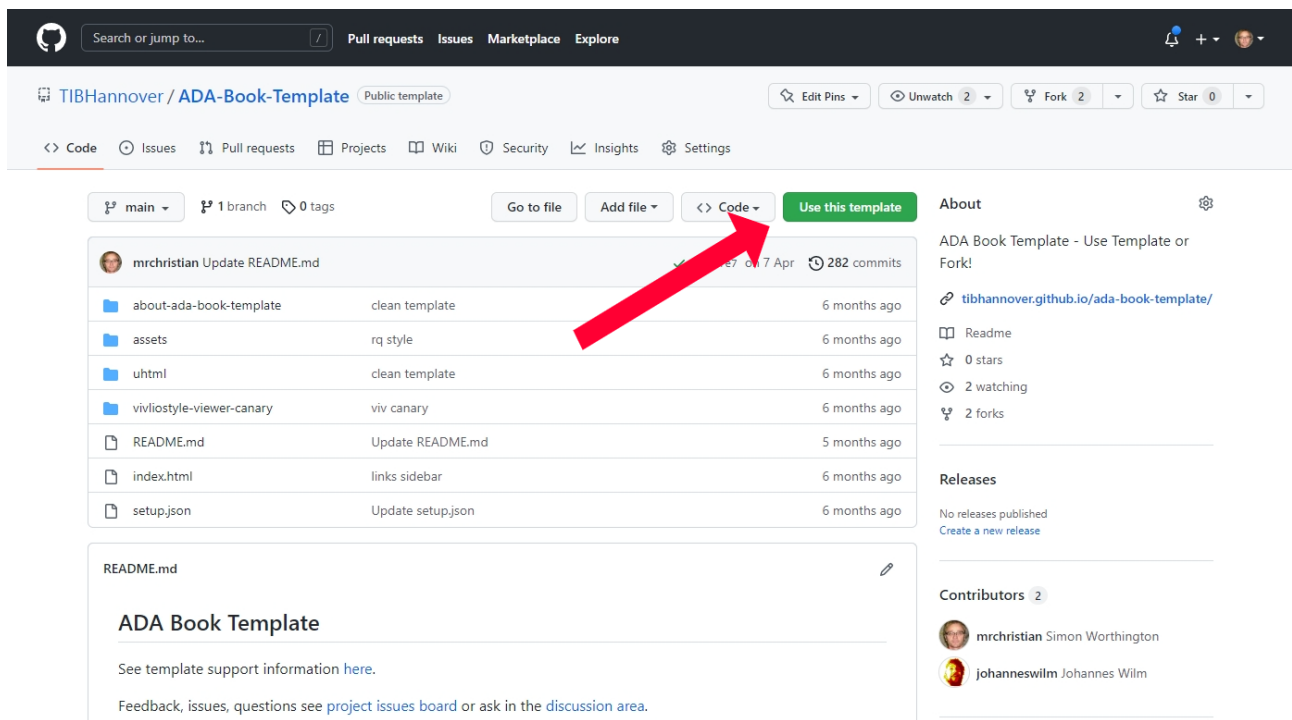
These steps will allow you to create a repository to for your publication with the option for a website.

### Create a repo

Use a GitHub Template Repository (Repo)

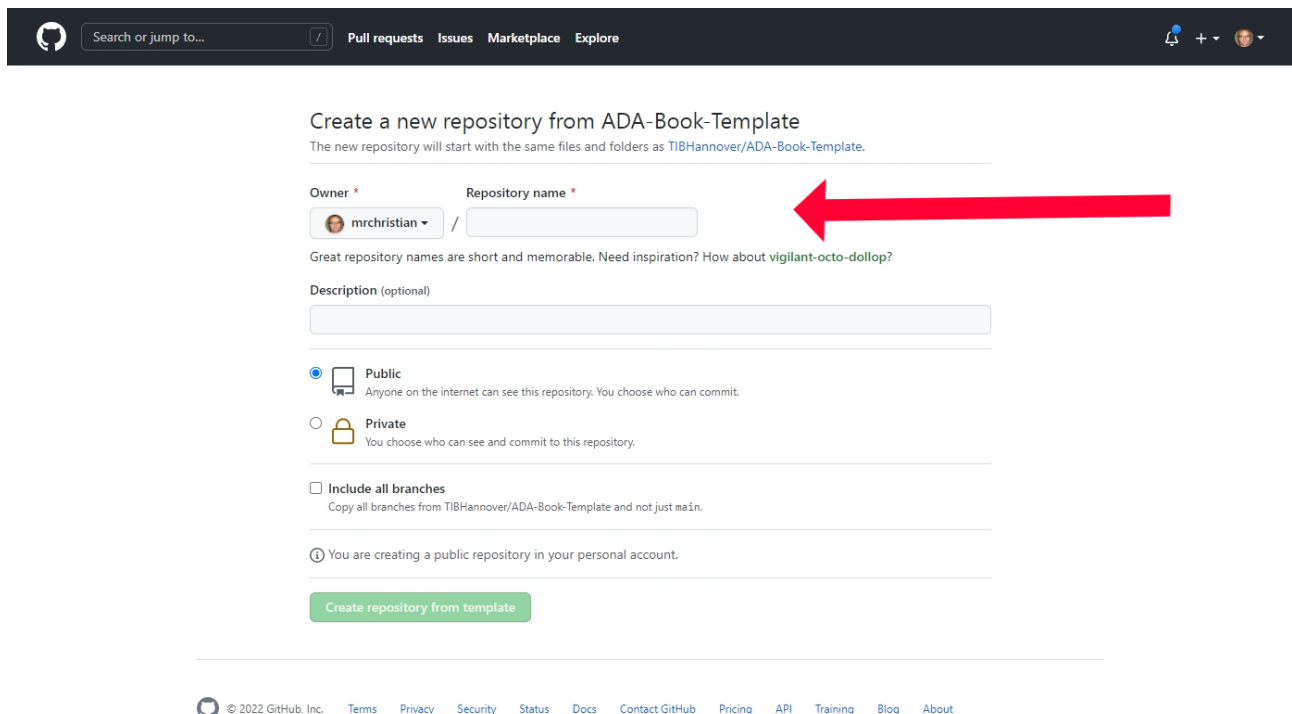
You will create a prepopulated GitHub template repository for you publication. The template repo contains components for creating the website and providing links to the other publication formats in the website.

Navigate to the [template repo](#) and click the green button 'Use this template'.



Example template repository

Then choose **where you will make the new repo** and **its name**. Once chosen click 'Create repository from this template'.



Name your repo

**Where to save your repo?** In GitHub you can save repos with organisations or in your personal account, select this under the field labeled 'Owner'.

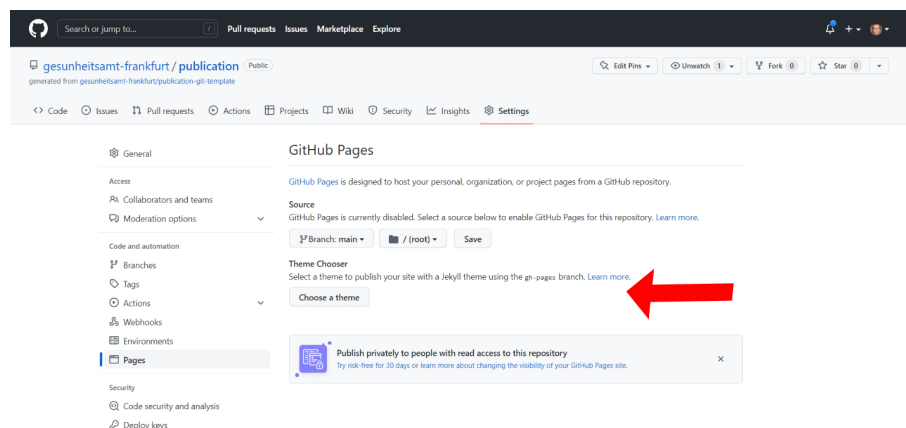
**How to name your repo?** The name of the repo will be its display name and URL address. It is good practice to adopt a naming convention style to be inline with other publications, this might be a short title, or even an acronym. Note it is good practice to use only lowercase in the name as the URL is case sensitive. Names can be changed at any time but it will change any associated URLs.

Note: Repo names can be changed at any time, but this will change the website URL to be the new name and you must remember to update the URL in other places where you have used the URL address.

**Other settings:** You can give the repo a description; make the repo public is the default, and the click green button.

## 1. Create a website

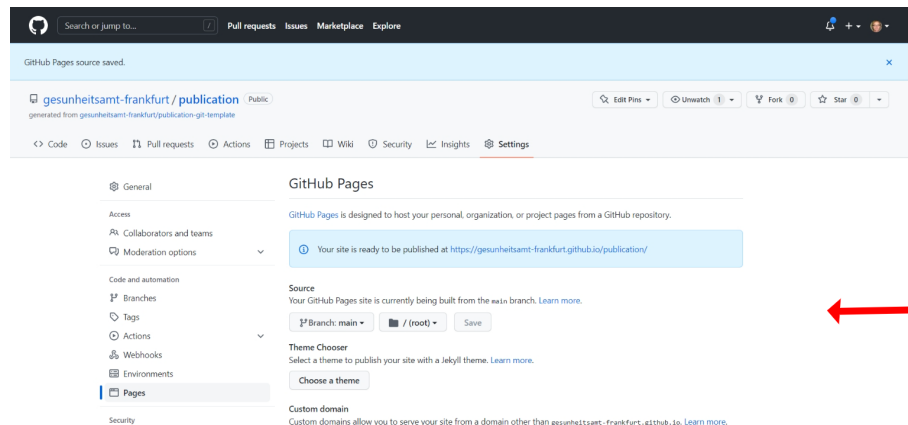
GitHub has a service called GitHub Pages. This creates free websites on the domain github.io or you can use your own custom domain. The default URL address pattern is `https://organisation-name.github.io/publication-name/`. The content from your repo will be available on the URL. Note: Websites can be given custom domain names. You will need to consult GitHub documentation to enable this feature. This is a two part process. **Part 1:**



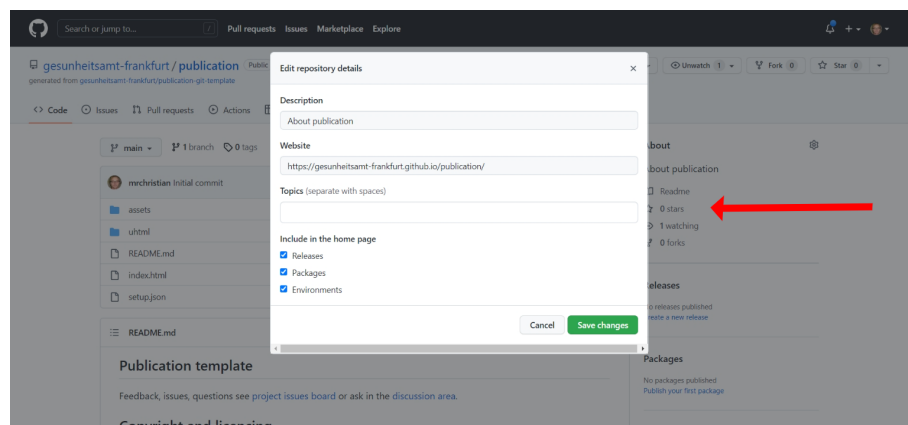
Navigate to 'Settings' in the top horizontal options. In settings on the left menu select 'Pages'. In the dialog in the main page use the following settings: Select branch - main; select folder - root, and; click save. This will complete the site creation and give you a URL for your



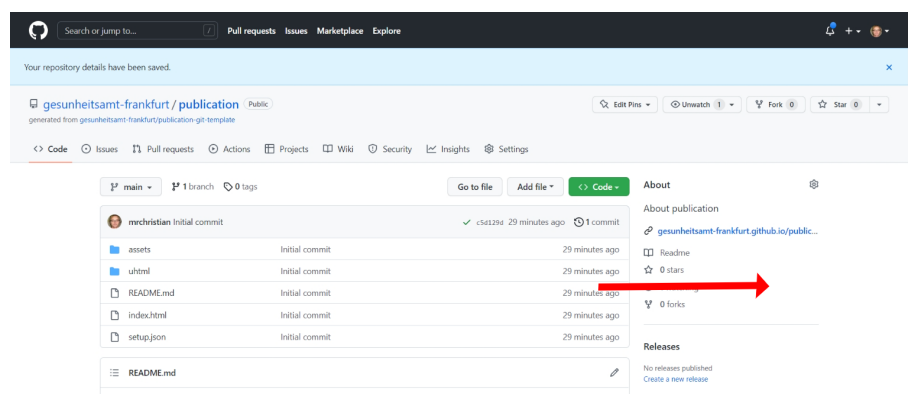
website. Copy the URL and you can then use it to add address to front end of the repo.



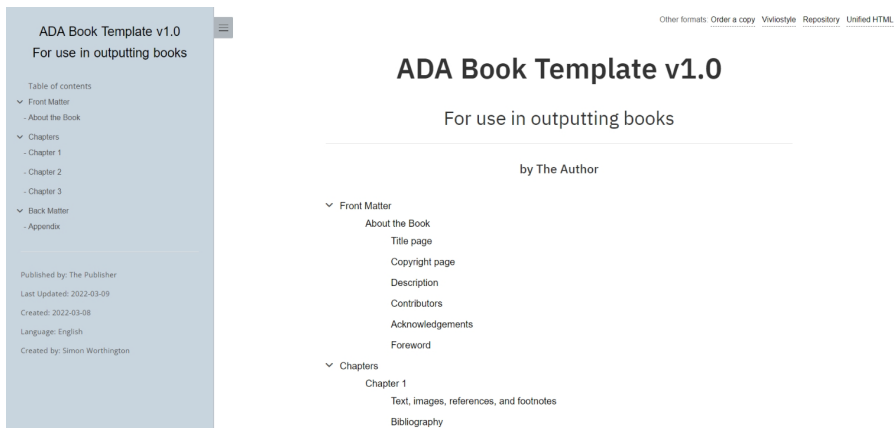
To paste the site name into the front end of your repo first go to the front end of the repo by clicking <code>. To the right click the cog next to About and in here you can paste in the URL and save.



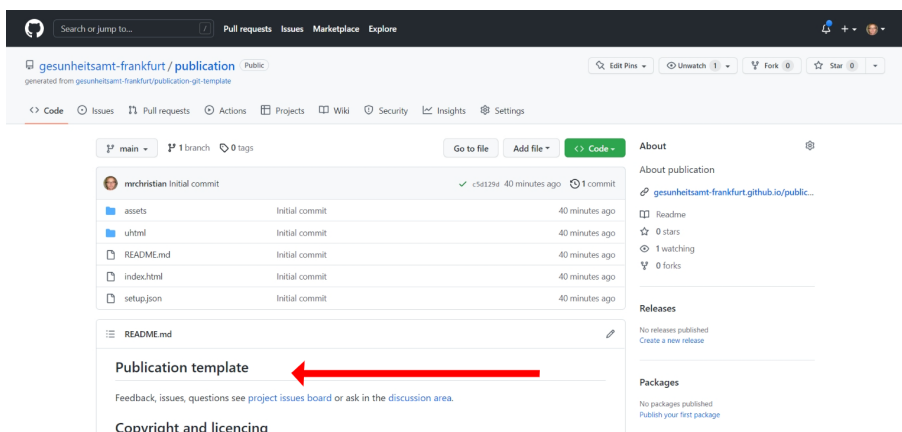
You will now have a website and the address appears top right.



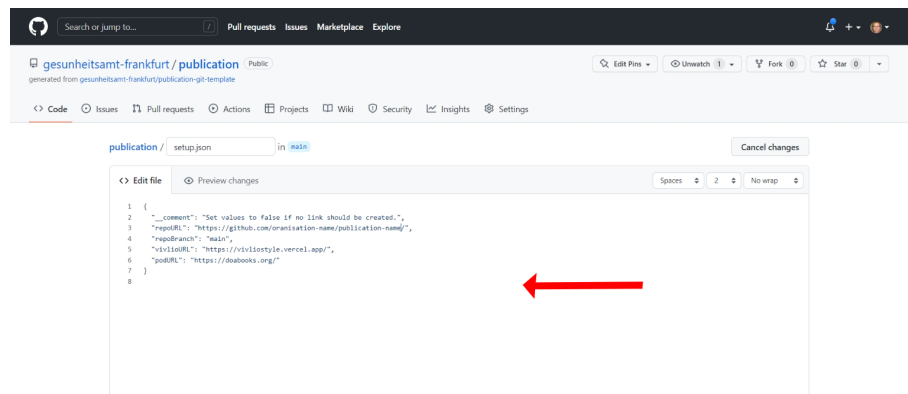
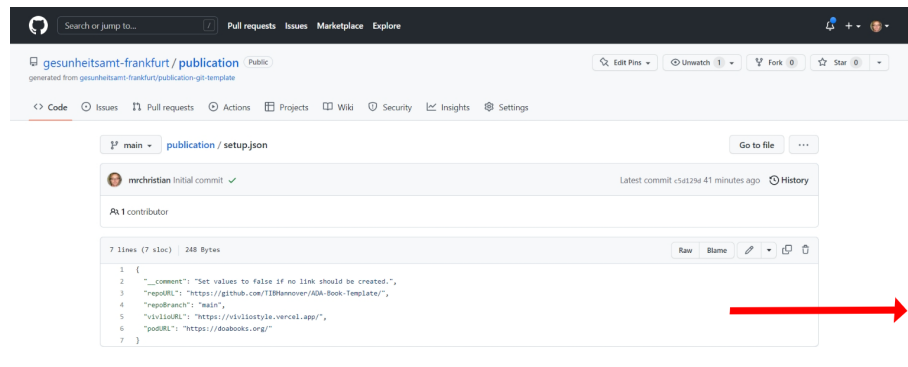
Your website will look like this. Currently the site will contain benchmark content to demonstate that layout features are working correctly. This content will be removed once you output your publication.



**Part 2:** To enable the Paginated Web version of your publication the repo address needs to be added to the setup.json file in the top level of your repo.



Edit the file setup.json and add in the organisation name and repo name into line 3 and save at the bottom of the page. "repoURL": "https://github.com/organisation-name/publication-name/".



## Step 1 completion: What's next?

Now that you have your repo and website setup, next you will set-up a book project in Fidus Writer and connect it to your Git repo, this will allow you to output book files from Fidus Writer to Git.

## Bibliography

Perkel , Jeffrey . 2016. “Democratic Databases: Science on GitHub.” *Nature*, 2016. <https://www.nature.com/articles/538127a>.

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# Step 2: Create a Book Project in Fidus Writer

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The book project in Fidus Writer will act as an empty container for your publication, later on you can change all the file names and book information to reflect your books title and content. You can also add and remove documents at any time.

## What's covered here

1. Create a 'personal' folder (only you see this - it is not shared) for your book documents
2. Create placeholder documents for your book parts
3. Create a Fidus Writer book - a collation of book documents, make divisions into book parts
4. Connecting your book to a Git repo

In a later step sharing the book with your team will be covered.

Full book configuration details can be found in

## 1. Create a 'personal' folder

Here you will create a folder and after this create your documents in the folder. To start with you need to be in the Documents area of the website.

At the top of the page in the secondary menu click on 'Create New Folder'.

PIC

Give the folder a name

PIC

Now you will have an empty folder. If no documents are made in the folder and it is left empty the folder will not be saved.

## 2. Create placeholder documents

These are the placeholder document examples you will make:

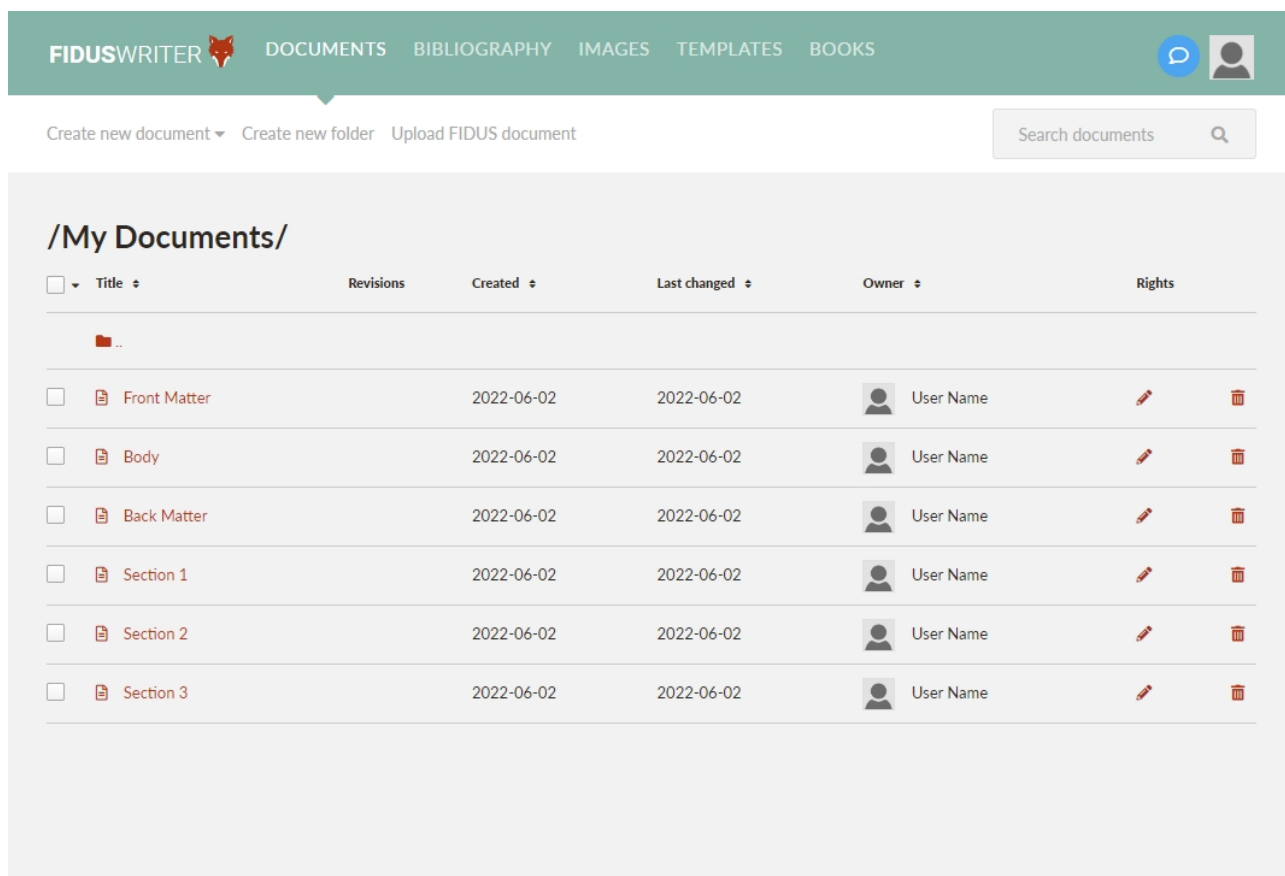
- Front Matter: Where you will add imprint, contributor information, acknowledgements, etc.
- Section 1: A top level part of a book as section or chapter
- Section 2
- Section 3
- Back Matter: This can contain appendices, glossaries, abbreviations, etc.

### How to create documents

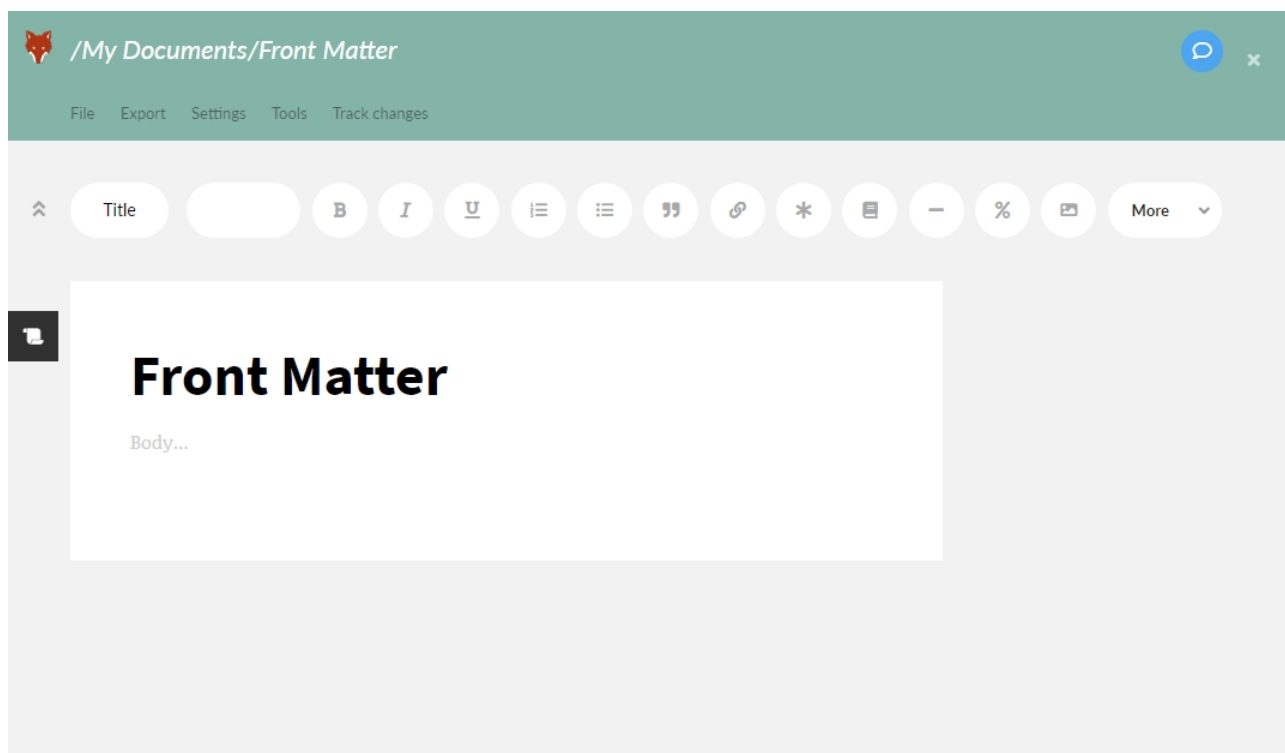
Navigate to 'Documents' area of the website. In the sub-menu below documents select 'Create new document' and choose 'Book Default' document template. If you are working on a special book or publication series you might use a different document template.

Here you will add three documents as placeholders. These are added so you can configure your book basics, names and documents can be changed or deleted later. Make three documents with these name: Front Matter; Section 1, and; Back Matter.

<add screen shots for document creation: 1. Add, 2. select doc template, 3. document title and document name, 4 Close document, document settings>



**Figure 1:** Adding documents to be used in your book



**Figure 2:** Edit document and add a title

### 3. Create a Fidus Writer book

A Fidus Writer Book collects together a series of Fidus Writer documents. Here we will create a book and add your docs, as well as carry out some basic configurations of the book.

Navigate to the Book section of the website.

PIC

Click 'Create new book'. You will be shown a book dialogue box with a number of tabs: Basic information, Sections, Bibliography, Epub, Drucken / PDF, Validation, and Git repo.

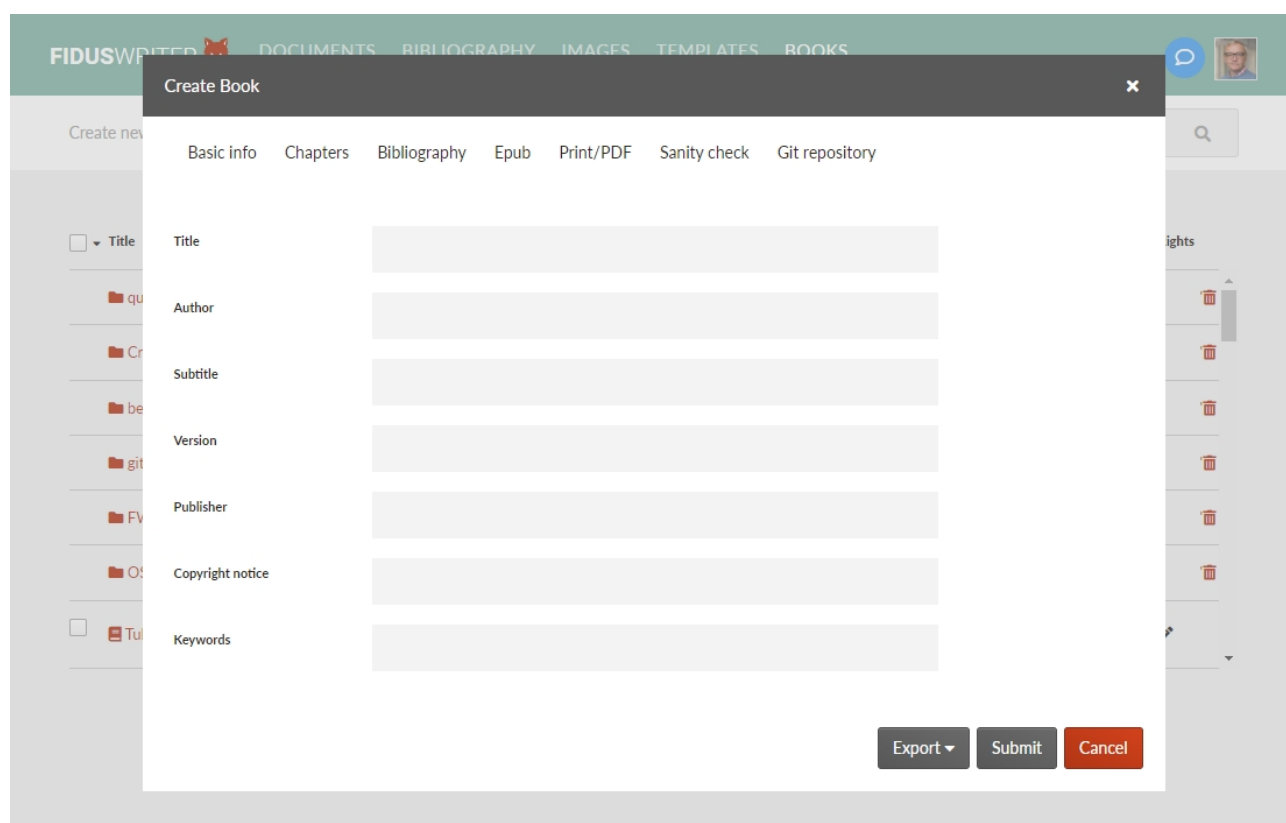


Figure 3

To start with you will only complete a few settings, you can return later to complete all of the book setup. Here we will fill out the title and add your documents.

Add title.

To add your documents move to the 'Sections' tab. Here you will see your Documents listed on the left, at the top your newly created 'folder'. Click the folder to display its contents. You can add your documents to the book by selecting them and clicking on the arrow in the middle to add them to the right column. Now save your book. The dialogue box will now close and you will see your book listed in the book section of the site.

You can return later to complete all the book settings.

PIC

## 4. Connecting your book to a Git repo

This part of the process only needs to be carried out by publication managers or users who will be outputting to Git. If the Git repo is public then any user will be able to see the saved content without any login credentials.

You need to have created your Git repo which is covered in Step 1., this will repo will be where you save your book too.

First we will connect Fidus Writer with the Git instance you are using, this is done by authorising Git to connect with Fidus Writer using you user accounts on both systems.

1. Make sure you are logged into Git and Fidus Writer.
2. From the Fidus Writer homepage navigate to your user profile at the top right and click on your user name, this will take you to your user profile page where you can connect with your Git instance in the 'social accounts area'.
3. Click Connect next to the Git instance you want to connect to.

PIC

4. You will now be redirected to the Git website, you will need to login if you haven't already done so.

PIC

5. Then accept the Authorisation. This process connects your user accounts and allows the two systems to transfer your publication files.

PIC

The connection process is now complete and we will now select the repo for your book.

6. Navigate to your book and click on it to open the book dialogue box. Click on the Gitrepository tab on the right.

PIC

7. Click 'Refresh' on the right to get your list of repos from Git. The repos will now be available in the drop down menu.

PIC

8. Select your repo from the list, then below all the output types should be checked, and click save.

9. You can now export your book to Git. You will see your book listed in the Book site area. Select the checkbox for your book and in the menu



above the checkbox to the left select 'Export to Git Repository'. A dialogue will appear asking for a Commit message, this is a note for this revision export.

PIC

A message dialogue will appear bottom right. When the message 'Your Book has been successfully save to Git' appears the process has finished.

PIC

You can now navigate to Git and you will see your files on Git. That is the end of this process.

PIC

## Next steps

You can now invite your team to access the publication on Fidus Writer.

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# Step 3: Invite Your Team

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You can invite contributors to your publication project and give them access to project documents and book.

**Note:** This setup is so that contributors can edit documents and preview the book publication as PDF, e-book, etc., without being able to export the publication to Git, change the order of sections (chapters), or edit other book information and settings.

If you do not have an account yet as a contributor or as a publication manager you need to have your team added as users then see account creation in the guide section 'What You'll Need to Get Started'.

For contributors access to a publication is a three part process:

1. First, the user has to accept being a contact of yours.
2. Second, you grant document editing access, and
3. Third, you can give view-only access to the book so that users can download previews.

Team members can also be give access for different roles, these roles are described at the end of the section, as:

1. reviewer with commenting only on documents;
2. as an editor with track changes permissions on documents;

## 1. Adding users as Contacts

In the homepage of Fidus Writer navigate to your user icon top right and from the drop-down menu select Contacts.

PIC

You will see an empty page if you have no contacts yet or a list of contacts.

PIC

Click add contacts top left, you can add contacts here by username or email address. Each contact added will be notified about your contact request and will need to approve the request.

PIC

The user will get a notice in Fidus Writer and as email about the contact request, and then they need to accept the request. The notice will come up as a pop-up request for them to click through to contacts. Also, they can always visit their contact areas to check on your request.

PIC 1

PIC 2

You can see the status of your invite for a contact in your contacts view area.

PIC

If you have problem adding contact then get in touch with administration support, and they can help check on the status of invites etc. All personal information is used in strict adherence to GDPR and principles of Digital Sovereignty where users always have to grant explicit access to their personal data.

## 2. Giving users access to edit documents

Navigate to the Fidus Writer home and the documents area and from there into the directory you made in the earlier step in the guide. Here you will see a list of your publication documents.

PIC Docs top level

PIC list of documents in directory

In the directory select the top checkboxes above all the document checkboxes this will turn on and off (toggle) the selection of all the documents, then click the drop-down icon and select 'Share' from the drop-menu.

PIC share

You will now see the share dialogue box. Add users by moving them from the left to the right column and edit icon next to each user and change it from the view (eye icon) to edit (pencil icon) to give them full edit access, otherwise they will only be able to view documents. And then save your sharing settings.

The sharing task for documents is now complete.

If you add a new user or new document - then repeat parts 1. and 2. again.

### 3. Sharing your book for view only and preview download

You want your contributors to be able to view the book settings and preview the complete book in its different typeset layout formats, but prevent them from publishing the book or directly rearranging book sections or selecting a new layout typesetting style, etc.

In this part we will share the book with the same users as before in documents, but with the permissions as view only.

1. Navigate to the book site area of Fidus Writer and locate your book.

PIC

2. To the right of your book click the pencil icon. This will bring up the sharing dialogue box. As before with sharing documents move the users from the left column to the right column to share the document with them. The difference this time is that we're going to leave the users as view only (eye icon).

Once you have completed this part the sharing setup is completed.

PIC view

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### Adding reviewer and editors to documents

For documents, you have the option to set a users access rights as view only, comment only, or as track changes only.

These setting are useful for reviewers and editors.

PIC showing drop-down

### Next steps

Next we will look at outputting your publication to Git. This will be the fourth and final step in this guide for your publication workflow.

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# Step 4: Publish as Multi-format!

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What is covered in the quick start guide for multi-format publishing.

For users of the system you will only need to select your layout design style from the available library of style and click output.

1. First the system can create many outputs from one source as 'Publication Ready Outputs' (PROs)<sup>2</sup>, as well as output additional interoperable and machine readable formats.
2. The system can apply pre-made reusable templates of '**layout design styles**' with automate machine typesetting.
3. Save out styled output formats to Git at the push of a button, or preview the outputs direct from the system. Note the PDF format needs to be saved locally and then uploaded to Git (this will be automated in the near future, Sept 2022).

## Output formats we'll cover here

Other format outputs are listed in the System Configurations and Settings section.

- Website
- Paginated Web
- PDF
- Print-on-demand (PDF)
- e-Book

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<sup>2</sup>. A Publication Ready Output (PRO) means that the format is ready for professional publishing, including typesetting, metadata, and other formatting and settings. Many systems can save files in a format, for example as HTML, or PDF - but it does not mean it can be used professionally. Microsoft Word can save as HTML or PDF but it doesn't make the formatted files into finished publications ready for distribution.

**Table 1:** Starter output formats. More formats are available but to start with we'll cover the set below.

| <b>Formats &gt;&gt;&gt;</b>                       | <i>Website</i>                    | <i>Paginated Web</i> | <i>PDF</i>                       | <i>Print-on-Demand (PDF)</i>                           | <i>e-Book</i>                                       |
|---|-----------------------------------|----------------------|----------------------------------|--|---|
| <b>Examples</b>                                   | Template (to be provided)<br>LINK | -                    | -                                | -  | -   |
| <b>Features</b>                                   | Mobile first responsive           | Fixed page           | Screen PDF (symmetrical margins) | Print from one copy at a time. (recto - verso margins) | Use on e-Readers and distribute through book trade. |
| <b>Running header / footer</b>                    | Place in left menu                | yes                  | yes                              |  | n /a  |
| <b>Date (custom formats)</b>                      | Place in left menu                | yes                  | yes                              |  | Inline  |
| <b>Version (From Fidus book version No.)</b>      | Place in left menu                | yes                  | yes                              |  | Inline  |
| <b>Comments</b>                                   |                                   |                      |                                  |  |   |
| <b>Fidus exports used to make output formats.</b> |                                   |                      |                                  |  |   |

## Preview outputs

You can download any of your outputs locally from the book dialogues window.

See notes on PDF export below.

PIC

## Applying layout design styles and Git export

1. Navigate to the book area of the site and here click on your book to open its dialog box.

PIC book area

PIC book dialogue

2. In the book dialogue box select the tab on the right Git repository.

3. In the Git repository tab select the following: the repository you want to save to (this will already be selected if you used the earlier guide setup); the output formats you want to use, and then from the export button bottom right select 'Export to Git repository'.

PIC Git settings - highlight 3 options from above

PIC Export to Git repository - selection

4. A Git dialogue will now appear called 'Commit message'. This is a note about the export you will make to Git and it will appear in the file listing for this git export. The purpose of the note is to inform other team members or Git users about your export, for example what kind of updates were made. A Commit message should be informative and you can pick your own style, noting these may be public if the Gitrepo is public.

Click save and the export will start. The system will give you updates on the progress bottom right.

PIC Git export dialogue 'Commit message'

PIC Progress messages.

4. You can now save your book settings in the book dialogue box.

PIC book dialogue box.

5. Your export is now complete and your publication will now be on Git.

PIC Git - formats

PIC website

From the Git export you can either have the Git content be public or private. Additionally you can manually or automatically have content distributed to other storage locations or systems.

## Exporting PDF to Git

PDF outputs need to be saved locally and then uploaded to Git.





# Publication Info

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# Imprint

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Author: Simon Worthington

Date: 2022

Content: Creative Commons Attribution-ShareAlike 4.0 International ([CC BY-SA 4.0](https://creativecommons.org/licenses/by-sa/4.0/)).

Multi-format CSS Templates from **Interpunct** – *full stack graphic design*, [Interpunct.dev](https://Interpunct.dev). GPL and code address.

Illustrations [Blush.design](https://Blush.design). All Illustrations published on Blush can be used for free. License <https://blush.design/license>.