edDesk (Lotus Notes)

User Guide

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Disclaimer

This is the first edition of the *edDesk (Lotus Notes) User Guide*. You are part of the review and feedback cycle for this user guide and your input is greatly appreciated.

Please be aware of the following:

- If you find any errors, please email: fborkman@itechne.com
- There is mention of advanced / specialised courses being available. They are not available yet, but will be coming soon.
- This first edition does not have an index. There will be an index in future editions. The Table of Contents is comprehensive.
- Owing to some developmental issues there is no information on using the Calendar features. However, as soon as the Calendar has been upgraded a chapter on its functionality will be reinstated in this user guide.

Thank you.

Frances Borkman
User Education Director
itechne

Acknowledgements

edDesk (Lotus Notes) User Guide was researched and written by Frances Borkman, itechne.

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White, J.D. (undated) *How to use the itechne edDesk*, itechne

White, J (Joanne) for explaining the procedures involved in editing articles for print media.

Revision History

Date of Revision	***Revision by:***	***Revision summary***
September 2005	Frances Borkman	First draft submitted for initial editing. Some parts incomplete due to the need to fix bugs and do some system enhancements.
June 2006	Frances Borkman	Hidden text comments added to features that do not function correctly. Hidden for client printouts but able to be viewed for itechne review.
6 October 2006	Frances Borkman	Draft presented to other staff at meeting. Requested feedback, error corrections, system enhancements in response to hidden comments.
November 2006	Frances Borkman	Removed chapter about Calendar due to non-functioning elements. Chapter to be reinstated when problems with the calendar are fixed. Converted non-core components to appendices.
April 2007	Frances Borkman	Final draft submitted with new inclusions on Editing homepages and Using Webforms.

Table of Contents

1. Introduction

1.1 WHAT IS EDDESK?

edDesk is an "editor's desk" that allows you to write, edit, produce and distribute content for multiple media. edDesk brings together everyone on a team so you can see who is working on what, and where it is up to in the editing process.

There are two basic concepts in edDesk –

- you have content
- you can organise and display your content in several ways, depending on your role and objectives.

edDesk separates content from appearance, letting content contributors concentrate on content, and not be concerned about the layout of that content. edDesk also provides version control and workflow management, making it easy and effective to use when your team is located in more than one place. You can access edDesk from two places:

Web browser. This is mainly for simple editing, writing copy and filing copy. There are some features of edDesk that are not available through your web browser.

Lotus Notes. This is the recommended access when you need to do a lot of editing. There are several features available through Notes that are not available in the web version.

This user guide covers only the Lotus Notes version of edDesk.

1.2 GENERAL OBJECTIVES

After reading this user guide and participating in an introductory training session you should be able to:

- login and logout from edDesk
- navigate accurately through edDesk
- use Views to list articles that meet certain criteria
- search for articles from within Views
- create new articles
- create a hierarchy of related articles
- use the edDesk workflows to manage the progress of your articles
- edit articles and subarticles
- attach files in various formats to your articles
- import and insert images into your articles
- cancel articles when they are no longer required
- edit homepages

- replicate your databases and know when replication has occurred successfully
- add your most often used databases to your Favorites
- create and maintain a Folder structure so you can quickly access your articles
- print Views and articles

After attending the introductory course you are eligible to attend an advanced training session. By the end of the advanced training session you will be able to:

- create simple Views to list articles fulfilling particular criteria
- create simple "Agents" to automate some processes for you
- delete Agents that you have created but no longer need.

Specialised courses
These courses are not yet available.

1.3 INTENDED AUDIENCE

This user guide and accompanying training course are intended for those people who have not used edDesk before but now need to use it to write and edit articles and prepare those articles for publishing - in various media formats.

It is not intended for those people involved in the technical setup and support of edDesk.

1.4 ABOUT THIS USER GUIDE

This user guide instructs you in how to use the most common features of the Lotus Notes version of edDesk.

This user guide is structured so that you:

- first learn the various ways of viewing content that is already in edDesk and then
- learn to create your own content (called articles).

The primary goal of this guide is to be a reference for you when you have returned to your work location. It will be referred to during training courses, but not followed cover to cover.

Appendices introduce you to some of the more “advanced” features of edDesk. Some people will not need to learn these features, others may wish to attend a more specialised training course, dealing with just those features.

1.5 NOTATION CONVENTIONS

This guide uses the following notation conventions:

Bold	screen names and for general emphasis
*Italic*s	Menu option that you select

Bold courier	edDesk tabs and article tabs (article tabs are tabs within an article)
Lucida sans console	Field names
<italics>	button to be clicked to get to the next step
Courier	text of on-screen messages and prompts
century gothic	used for examples
bordered century gothic	Used for important points and handy hints that you should try to remember!

i Spelling

Australian English is used throughout this guide, except where Lotus Notes menus use American English.

ii Control keys

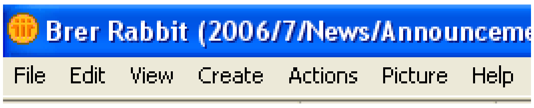
If you see an instruction written like "Press *<Ctrl>+b*" then you hold down the <Ctrl> key while you press the letter after the plus sign.

For example, <Ctrl>+b means hold down <Ctrl> while you press b, then let both keys go.

1.6 TERMINOLOGY

The terms listed alphabetically below are mentioned only in context of their relationship to edDesk.

Article	Each story is called an article.
Database	The collection of articles for your organisation. An organisation may have several databases – often one for "production" (real articles, to be published); one for "playing" (often used for training, or experimenting with new features). Your organisation may also have separate databases for large projects.
edDesk	The application you use to create and edit articles and to manage the workflow for the publishing of those articles
Form	Any page that requires you to enter information so that content can be updated and saved.
Menu	A list of options that drops down (opens) when you click on the menu name. For example, the Tools menu in the article toolbar. When you click on Tools a list of options opens for you.
Menu – Lotus	Menu that appears along the top of your Lotus Notes window. Different

Notes	menus are displayed depending on what you are doing in edDesk. 
Navigation pane	The menu down the left side of your screen. Options vary depending on which tab you have opened (and your organisation's requirements).
Subarticle / Related article	Large articles may be broken into smaller parts, called subarticles or related articles. Subarticles are "children" of articles. For example if you are reviewing digital cameras you may want each camera reviewed to be in a separate subarticle. They can be reordered easily within the article structure.
Tab	List of windows you have opened in edDesk. Appears along the top of your edDesk screen. The first tab you normally see is the **Home** tab. In addition each article has a set of tabs that allow you to enter specific types of information.
Toolbar	A list of options that you can select, displayed horizontally.
Toolbar – article	The toolbar that appears along the top of an article. 
View	A way of organising the display of articles in a relevant manner. For example, if you are in the Creating tab you can organise your content by Story Idea, Active Briefs, Filed Copy.
Workflow	Where an article is up to in the entire production process – ranging from story concept to published.

2. Publishing steps in a nutshell and how they relate to edDesk

This chapter outlines the publishing steps (briefly) and how it relates to what you need to do in edDesk.

2.1 GENERAL PUBLISHING PROCEDURES

Step	What needs to be done	edDesk procedure	Chapter in User Guide for more information
Step 1	Decide on what story is needed	None yet	
Step 2	Write story brief	Create a New Article Fill in the details in the **`Basics`** and **`Brief`** tabs Brief details include instructions on length, payment, briefing instructions and illustration instructions, copy deadline, copyright options	Chapter 6 – Creating an article that is ready for briefing out
Step 3	Send brief to desired author	Email using edDesk's **`Brief`** tab.	Chapter 6 – section 6.5 – Briefing out your article
Step 4	Author writes article	Can write article in edDesk (if they have access to edDesk – determined by your organisation). If no access to edDesk, copy written in MS Word then emailed to the sub-editor.	Chapter 7 – Editing articles – entering copy into edDesk. Chapter 8 – Formatting text Chapter 9 – Including documents and images in articles
Step 5	Author submits article	If article written in edDesk then submitted via edDesk and workflow updated to reflect that copy has been Filed. If article is not written in edDesk, article submitted by email (eg. as Word attachment in email)	Chapter 13 – Workflows

Step	**What needs to be done**	**edDesk procedure**	**Chapter in User Guide for more information**
Step 6	Sub-editor or production-editor loads received content into edDesk	Edit article that was created for the briefing instructions. Add the text of the submitted copy. Update workflow of article.	Chapter 7 – Editing articles – entering copy into edDesk. Chapter 8 – Formatting text Chapter 9 – Including documents and images in articles Chapter 13 - Workflows
Step 7	Sub-editor edits copy in edDesk	Make appropriate changes to the uploaded copy. Update workflow of article.	Chapter 7 – Editing articles – entering copy into edDesk. Chapter 8 – Formatting text Chapter 9 – Including documents and images in articles Chapter 13 – Workflows
Step 8	Graphic artist does layout	Edits edDesk article, takes out any attached files, creates pages using Quark and Indesign. Creates PDF of finished pages and attaches the PDF to the edDesk article. Update workflow of article.	Chapter 9 – Including documents and images in articles Chapter 13 - Workflows
Step 9	Sub-editor does final check of laid out pages, pictures, captions etc	Reviews completed edDesk article with attached PDF.	
Step 10	Sub-editor requesting changes to article (not always required)	Comments entered into the PDF (not the edDesk article).	

Step	What needs to be done	edDesk procedure	Chapter in User Guide for more information
Step 11	Editor does finals	Update workflow details in edDesk article.	Chapter 13 – Workflows
Step 12	Publish article	Update workflow for the intended publishing format. Articles to be published to the web will be published automatically when the workflow status is changed to “posted”.	Chapter 13 – Workflows

2.2 TYPICAL ROLES AND EDDESK KNOWLEDGE/SKILLS REQUIRED

Role	Relevant chapters /sections in this User Guide
All roles	Chapter 1 – Introduction Chapter 2 – Publishing steps and how they relate to edDesk Chapter 3 – Getting started Chapter 4 – Views Chapter 5 – Searching for articles
Author / Contributor	*In addition to those chapters listed for All roles:* Chapter 6 – Creating an article that is ready for briefing out (not all authors will need to know how to do this) Chapter 7 – Entering copy into edDesk Chapter 8 – Formatting text Chapter 9 – Including documents and images in articles Chapter 10 – Article toolbar – Tools, New, Import, Export. Particularly sections 10.2 Tools menu and 10.3 Import menu. Chapter 12 – Creating hierarchical content – related articles Chapter 13 – Workflows – only section 13.2 Workflow for authors
Sub-editor and Editor	*In addition to those chapters listed for All roles:* Chapter 6 – Creating an article that is ready for

Role	**Relevant chapters /sections in this User Guide**
	briefing out Chapter 7 – Entering copy into edDesk Chapter 8 – Formatting text Chapter 9 – Including documents and images in articles Chapter 10 – Article toolbar – Tools, New, Import, Export Chapter 11 – Using article tabs Chapter 12 – Creating hierarchical content – related articles Chapter 13 – Workflows Chapter 14 – Housekeeping *It is a good idea to be familiar with:* Chapter 15 – Folders Chapter 18 – Webifying your article – Getting ready to publish on the web Chapter 19 – Printing edDesk content
Administrators	Entire User Guide
Webmaster	Entire User Guide

3. Getting started – becoming familiar with edDesk screens

3.1 OBJECTIVES

By the end of this chapter you should be:

- able to login to edDesk
- familiar with the left navigation pane
- aware of the most commonly used tabs in edDesk
- able to logout of edDesk.

3.2 EDDESK CONCEPTS

There are two basic components in edDesk. These are:

- **Articles:** this is where you create and edit content. You complete "article forms" then can later change the content in your forms; AND
- **Views:** Views let you control the way you display your content.

  For example, in the Creating tab you can order your articles by author, issue or keyword. Under the Production tab you can look at articles that have layout instructions, requests for change or that are being sub-edited.

edDesk displays relevant menu items depending on the tab you are using. Each menu item has a brief description. This lets you quickly select the part of edDesk that you want to use. The menu items are repeated in the left navigation pane.

3.3 LOGGING IN TO EDDESK

1. Click on your **Lotus Notes** icon.
2. The following login form displays, with your user name and organisation.

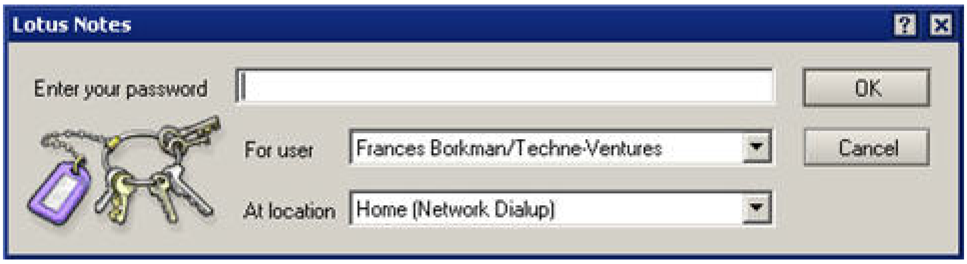


Figure 1: edDesk Lotus Notes login screen

3. Type your password.
4. Click on <*OK*>. The **Home** tab displays.

3.4 EDDESK TABS

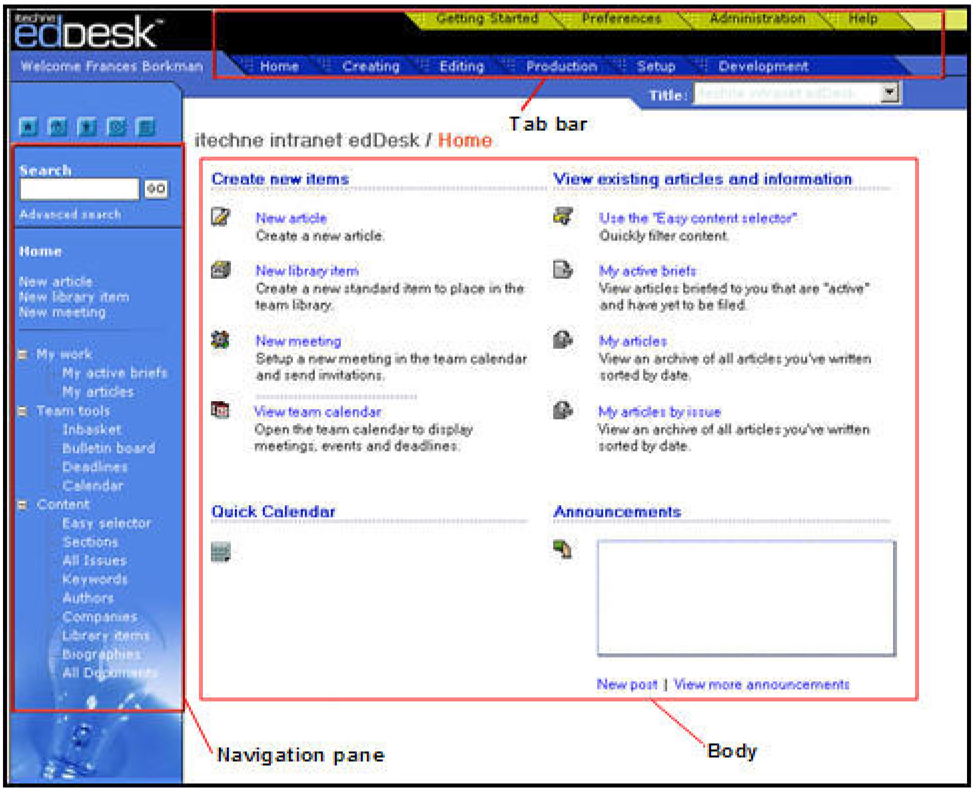


Figure 2: edDesk Home tab for the itechne Intranet

Each tab has three main components:

- navigation pane
- tab bar
- body

Navigation pane	Lets you access the various views of editorial content for your organisation. You can choose what you want to see, depending on pre-defined criteria, (known as Views). Late versions will let you Search for articles which meet your own criteria. You also use this pane to create new articles, view your articles, and schedule meetings.
Tab bar	Provides a quick way to go to different areas of activity in edDesk. For example, Editing tab provides the tools most commonly used by editors. Production tab groups together all the activities and information relating to production of the articles, with particular regard to illustration and layout requirements. If you do not have access to a particular tab can see the Tab name, but you will not be able to select it.

Body	The body is where the most commonly used features of that tab are listed.

i Navigation pane

The options you see in the navigation pane change as you move to different tabs in edDesk.

For example if you are in the Setup tab you see navigation options relevant for Setup, in the Creating tab you see options relevant for creating content.

There are standard collapsible menus available in each tab, meaning that no matter which tab you are using, you can still perform the most common functions.

The following options are available in each tab:

- New article
- New library item
- New meeting (uses the calendar feature – being upgraded)
- Team tools (some variations within the menu)
- Content

Team tools

There are various tools available to members of a team. These include seeing those emails sent by team members, deadlines (approaching and past), bulletin board for interesting items and a calendar of team member commitments. The tools vary depending on which tab you have selected. For example, the tools in the Creating tab are different to the tools in the Production tab.

Content

This is where you can see specific content for your organisation, using pre-defined "views" and structures of content.

For example, you can view by Authors, Sections, Issues - depending on your requirements. You can also select to view All Documents.

ii Tabs – an overview

Think of tabs as part of the publishing process. For example, if you want to create articles you would use the Creating tab. If you were involved in the editing of articles you would use the Editing tab more than other tabs.

Each tab has options relevant to the publishing stage of which it is part.

Brief descriptions of each tab follow:

Home

`Home` is the first tab to display when you login to edDesk. The **`Home`** tab lets you quickly do the most fundamental operations in edDesk.

Tools available in the **`Home`** tab are:

- New article
- New library item
- New meeting – this feature is being upgraded
- View team calendar – this feature is being upgraded
- Easy content selector
- My active briefs – stories assigned to you
- My articles
- My article by issue

Creating

The **`Creating`** tab has many of the tools used by writers. This tab is also used to view the progress of new articles. Tools available in the **`Creating`** tab are:

- New article
- New library item
- New homepage (for web publishing)
- Story ideas – ideas for stories that have not yet been commissioned
- Active briefs – stories that have been commissioned but not yet filed
- Filed copy

Editing

The **`Editing`** tab has many of the tools used by editors. These include views for:

- Late running copy
- Active briefs
- Filed copy
- Ready for production

- Changes required - stories requiring rewrites or edits, and the status of those stories
- Unassigned copy - stories currently unassigned to an issue.

Production

The **`Production`** tab has many of the tools used in the final production of an article. This tab includes views for the following information:

- Subs work desk - articles being subbed
- Changes required
- Artist and illustration requirements
- Production directions
- Production schedules
- Deadline calendars.

Setup

The **`Setup`** tab is for non technical administration of edDesk. Information entered in this tab becomes available to be used in articles. You can:

- create, view and edit sections
- create, view and edit subsections
- create volume and issue definitions
- create, view and edit geographical regions
- define production schedules
- create, view and edit keyword topics
- create, view and edit definition documents for a publication.

4. Views

Views are a way of looking at and sorting articles. There are many views available in edDesk and the most popular are available from the body of the relevant tab.

That is, if you are using the **Creating** tab you will have different views listed in the body of your screen to those in the **Editing** tab. Other views are available, but the most popular are listed in the body of the page.

edDesk is usually customised for your organisation, so some of the views listed in this user guide may not be available to you. However, the techniques and concepts involved in using views are always the same**.**

4.1 Objectives

By the end of this chapter you should be:

- familiar with views from the **Creating** tab
- familiar with views from the **Editing** tab
- familiar with views from the **Production** tab
- able to select views from the navigation pane
- able to sort your results by various criteria.

4.2 Why do I need Views?

Views let you find and organise your articles easily and quickly. They also let you track the editorial status of articles. They are an extremely useful tool for managing the flow of articles through the publishing process.

If you have a particular article listed in a view, you can select that article and (if you have access) edit it, pass it to the next stage of the workflow and manage the progress of that article.

Some views simply display their results as soon as you click on the view name. These include the views selected from the body of the **Home**, **Creating**, **Editing**, and **Production** tabs.

If you prefer to use your own criteria for viewing articles you would use the **Easy Selector**, available from the left navigation pane on all tabs.

4.3 Where do views get their information from?

Views use various criteria to display articles that match those criteria. The information used in views is entered into each article. If information has not been updated in the article, then that article will not be listed in the view results. Many views check the **Workflow** tab to find articles that match particular statuses, or have editing notes and change requests made.

For example, the view **Filed copy** lists all articles that have a status of *Filed*. This information is entered by either the article author or editor into the Workflow tab. If an article has been filed, but the status not updated in the **Workflow** tab then that article will not be listed in the view.

Make sure your articles are updated correctly so that they are listed in the relevant views.

4.4 GENERAL INFORMATION ABOUT USING VIEWS

i Selecting a view

1. Go to the required tab (for example, **Home**, **Creating**, **Editing**).
2. Look at the body of the page.
3. Click once on the required view.
4. Your results are displayed.

ii Display of results

Order of listed articles

Results are ordered by:

- To Be Assigned (to an issue)
- Issue date (descending order – most recent/future issue at the top of the list)
- Alphabetically by Library entry

Arrow next to article

Several views show an arrow next to some articles. The arrow indicates that there are articles related to the one shown.

Figure 3: Note right pointing arrow indicating subarticles

1. Click on the arrow.
2. The related articles are now listed. This is known as expanding the view. The arrow changes from a right-pointing arrow to an arrow pointing down.

Figure 4: Note downward arrow indicating that you are now displaying the expanded list, with subarticles

3. Click on the arrow again to collapse the view.

Horizontal scrolling

Many views display their results in a table. Often you will need to scroll horizontally to see the full summary of the article.

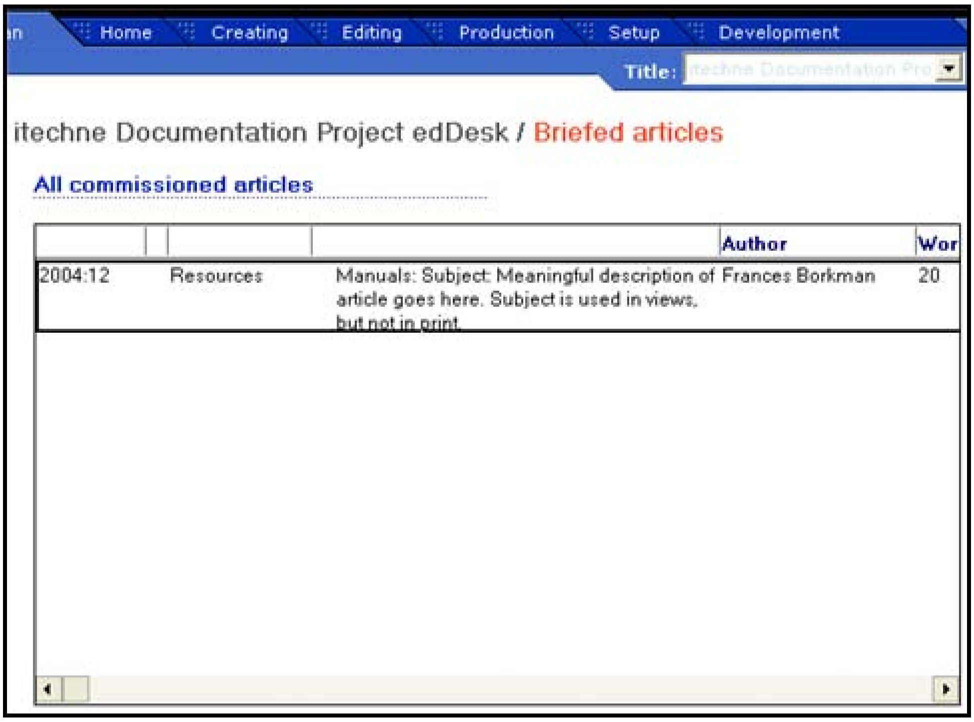


Figure 5: View results showing horizontal scrollbar across bottom of results table

If you don't want to scroll horizontally:

1. Click once on the article for which you want to view more details.
2. Move the mouse over the desired article.
3. Wait a couple of seconds. A popup window displays the details of the article.

Figure 6: Popup after moving mouse over article - showing detail available through horizontal scrolling

Expanding and collapsing your results

Many views are collapsed when you first select them. This means that all you really see are categories of results and you need to drill down through them to the particular articles you wish to view. The drilling down is known as "expanding" your view.

Views that are expandable and collapsible have the following toolbar along the top of the view.

Below is an example of a collapsed and expanded version of the same view.

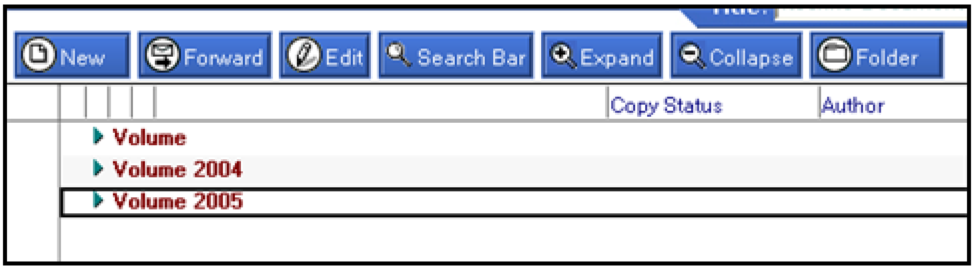


Figure 7: Collapsed version of the All issues view

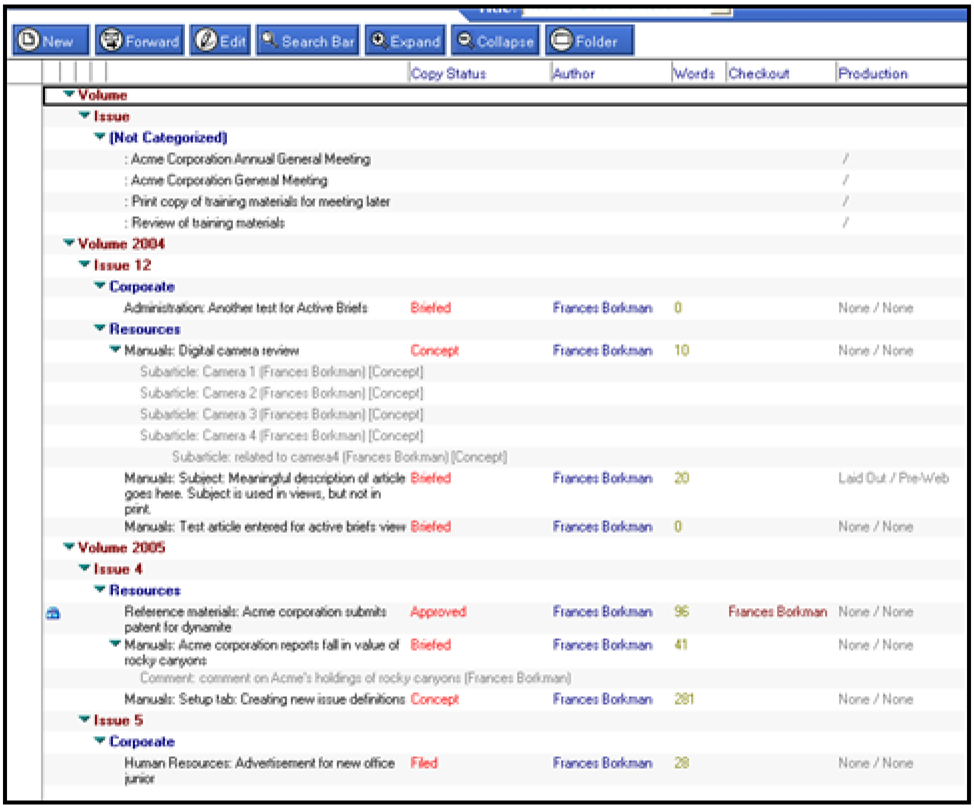


Figure 8: Expanded version of the All issues view

Expanding your entire results

1. Click on <*Expand*>.
2. All items in your view are expanded.

Collapsing your entire results

1. Click on <*Collapse*>.
2. All items in your view are collapsed.

> **Note**
> When you click on <Expand> or <Collapse> **all** items in your view are expanded or collapsed. You cannot expand or collapse only part of a view.

Drilling down through a view

If your view has returned a long list you may not want to expand the entire view. You may drill down through a part of the view.

1. Scroll to the category you wish to expand.
2. Click on the next to the category.
3. That category is expanded and the changes to a .
4. Repeat steps 1, 2 and 3 until you have drilled down to the required article.

Information displayed in a view

Going from left to right:

- Volume and Issue number
- Section that article has been entered under. Sections are used to categorise articles. For example you might have a Corporate section with subsections for Information Technology, Human Resources and so on.
- Subsection: article description.
- Number of words in the article (only words entered in the body of the article are counted).
- Author name
- Checkout – whether the author has marked the article so that changes can only be made by the author.
- Production – gives status of the article for printing and web. Status is taken from the **`Workflow`** tab of the article.

4.5 Easy Selector

This is the most powerful and versatile view available. You can enter your own criteria for articles to view.

The **Easy Selector** lets you quickly filter articles by the following criteria, and the associated sub-criteria:

- Volume/Issue
- Authors
- Keyword topics

- Copy status
- Sections
- Companies
- Regions

Important to put your keywords into articles

When you create an article it is important that you use as much classification information as you think you will need. It is used by the Easy selector.

For example, you might want to list all articles that are to do with the keyword Main Topic “Business”, with Sub Topic “Human Resources”. Only articles which have had the keywords attached will be found.

See chapter 11.3: Classification tab for more information.

1. Move your mouse to the left navigation pane.
2. Click on *Easy selector*.
3. The default **Easy selector** view displays, listing articles by Volume/Issue. The default display is collapsed.

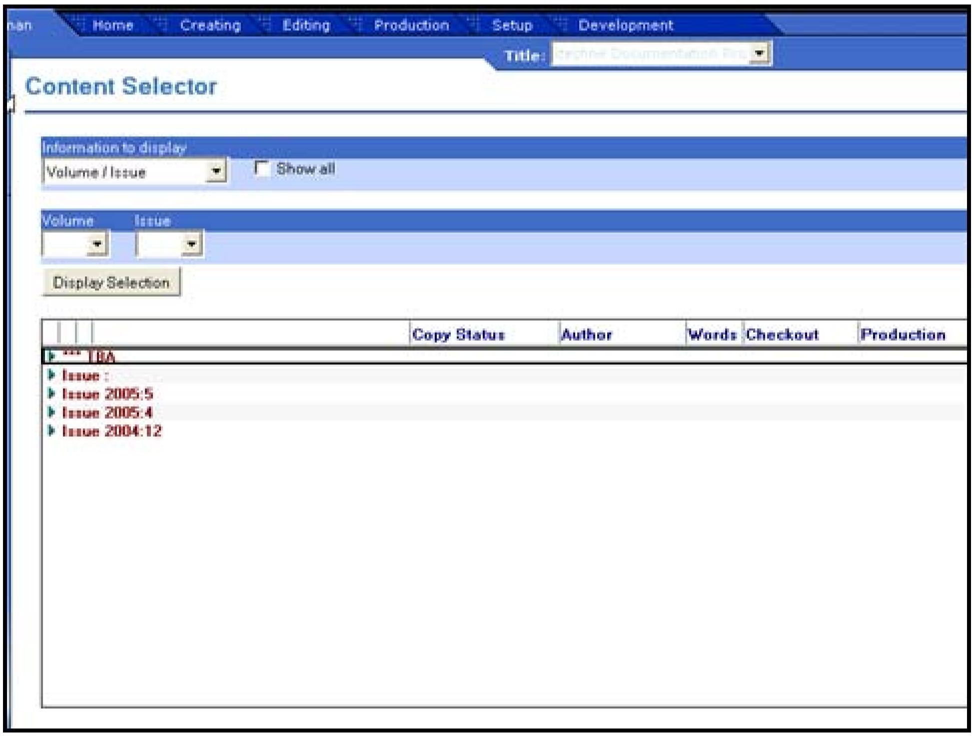


Figure 9: Easy selector default view - collapsed

4. You can expand your view by clicking on the arrow next to the required issue.

   ⓘ See section 4.4ii: Display of results: Arrow next to article for more information on expanding and collapsing views.

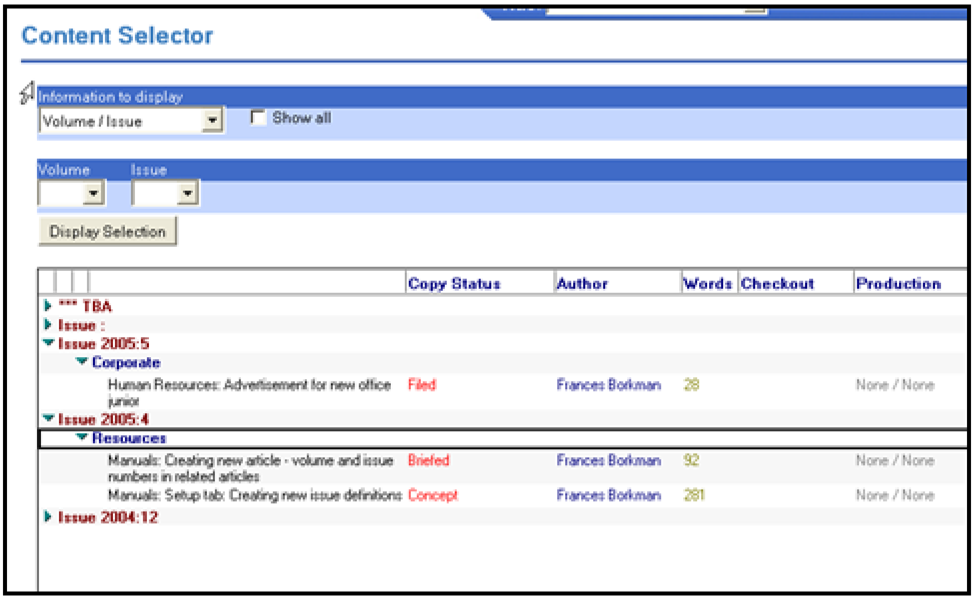


Figure 10: Easy selector default view - expanded

i Setting your criteria in the Easy selector

1. Go to the **Easy selector**.
2. Click on the dropdown arrow under Information to display.
3. Select the required information. Another dropdown menu is now available for subcriteria.
4. Select the subcriteria.
5. Click on <*Display Selection*>.
6. All articles matching your criteria are listed.

Example 1:

The diagram below shows the following selections:

- Information to display: *Companies*
- Subcriteria dropdown: all companies entered into edDesk

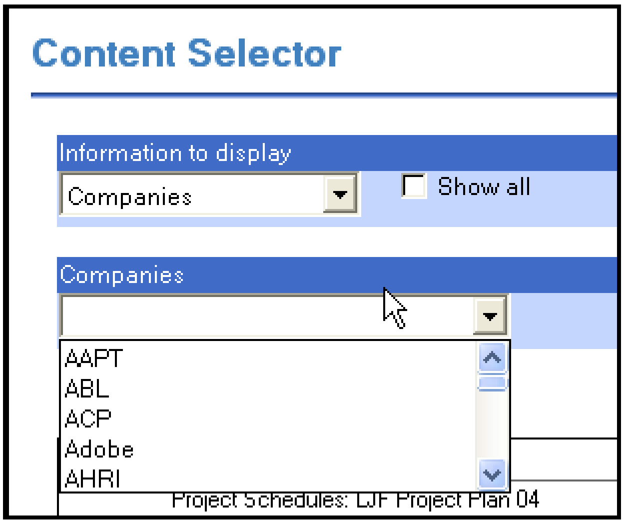


Figure 11: Easy selector after selecting Information to display "Companies", but before selecting a particular company

Example 2:

The diagram below shows the following selections:

- Information to display: *Keyword topics*
- Subcriteria dropdown: Main topic: *Education*; Subtopic: *Reference manuals*

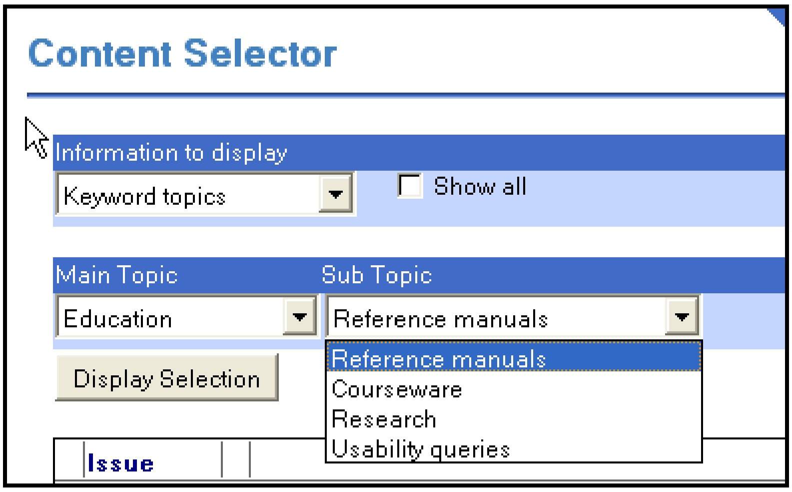


Figure 12: Easy selector after selecting Information to display "Keyword topics", with Main Topic "Education" and Sub Topic "Reference manuals"

4.6 VIEWS FROM THE NAVIGATION PANE

There are several views that are always available from the navigation pane, (no matte which tab you have selected). These views are:

- Easy selector. ⓘ see section 4.5: Easy Selector for more information.
- All Issues
- Keywords
- Authors
- Library items.

There are several other views available from the navigation pane in some tabs. These views are:

- Sections
- Current issues
- Companies
- Biographies
- All Documents.

These views automatically display their results when you click on the view title. ⓘ see section 4.4: General Information about Using Views for more information.

i All issues

Articles are listed by Volumes and Issues. The results are categorised by:

1. Volume
2. Issue
3. Section
4. Articles

You may expand and collapse this view.

ii Keywords

Articles are listed by keywords and subtopics. Keywords and their subtopics are ordered alphabetically. You may expand and collapse this view.

iii Authors

Articles are listed by author. Expand the list to view all articles by a particular author. The view includes a word count for each article and the total number of words in articles by that author.

iv Library items

Library items are standard items that you might want to re-use in your entire publication and database. They are particularly useful if you are publishing to the web.

Your system administrator will usually maintain library items.

Typical library information includes contact information, guidelines for authors and standard code. Library items are ordered by category. The category is selected when the library item is created. Available categories are determined by your database administrators.

v Sections

Articles are listed by section and subsection. Sections and subsections are listed alphabetically. You may expand and collapse this view.

vi Current Issues

Only articles in the current volume and issue are listed. You may expand and collapse this view.

vii Companies

Articles are listed alphabetically by the company with which they are associated. Companies are entered in the **`Classification`** tab of each article. You may expand and collapse this view.

viii Biographies

Biographies contain information about authors and team members. Position status, job title, contact details are contained in the author biography. Authors are listed alphabetically by first name.

ix All Documents

All Documents lists all entries into your database. This view is particularly useful if you have created an item, but cannot remember if it is an article, a library item, items added to classifications. Items are listed by descending date order (most recent item at the top of the list).

4.7 VIEWS FROM THE HOME TAB

Available views are:

- Easy selector. ⓘ see section 4.5: Easy Selector for more information.
- My active briefs
- My articles
- My articles by issue

i My active briefs

View articles that have been briefed to you, but which you have yet to file. These are generally articles that you are still working on. This view gives you a good way to track your articles through the production cycle. All articles where you are entered in the Author field in the **`Brief`** tab are listed.

Displayed by selecting:

- **My work > My active briefs** from the navigation pane OR
- **My active briefs** from the body.

When you first select this view, you see your articles with a status of briefed. You may change the status and author.

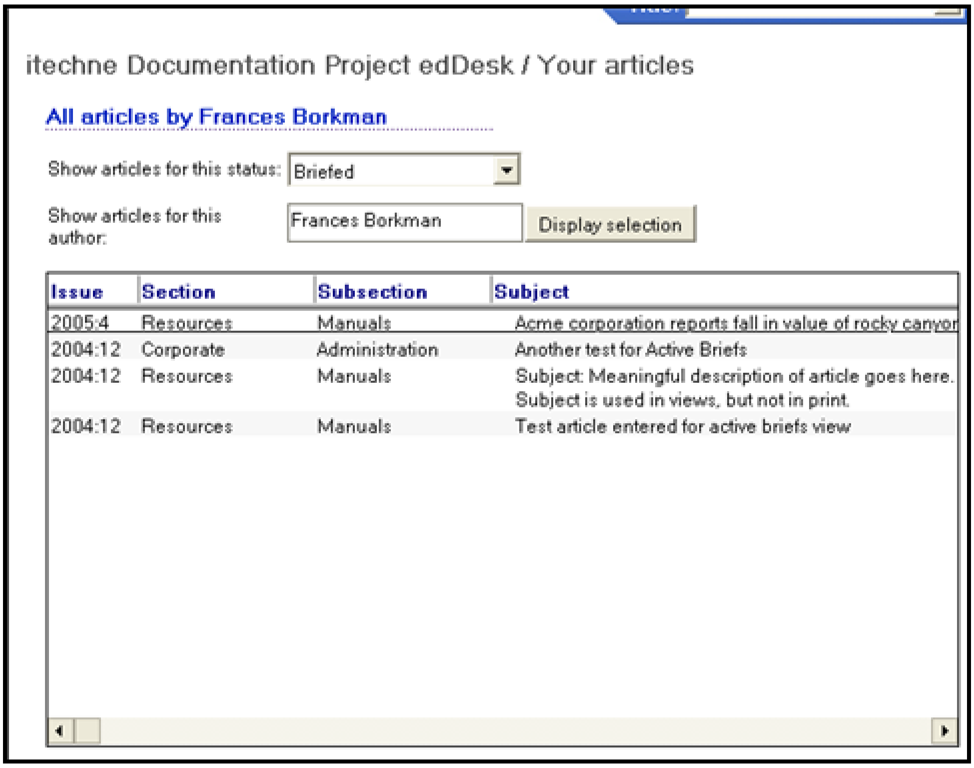


Figure 13: Default details - my briefed articles

Changing the articles you view

1. Click on the dropdown arrow next to Show articles for this status.
2. Scroll down to the status of articles you wish to view.
3. Click on the required status.
4. Show articles for this author: If you want to display articles for another author, type the author name.
5. Click on <*Display selection*>.

ii My articles

This view lists all articles where you are entered in the Author field in the **Brief** tab. They are sorted by date.

Displayed by selecting:

- **My Work > My articles** from the navigation pane OR
- **My articles** from the body.

iii My articles by issue

This is currently the same as the All Issues view and is being amended.

4.8 VIEWS FROM THE CREATING TAB

Views accessed from the **`Creating`** tab show the progression of new articles through the publishing process. These views are:

- Story ideas
- Active briefs
- Filed copy

i Story ideas

This view lists all articles with at **Concept** stage. Concept is the initial stage of an article – before it has been briefed to an author. The **`Workflow`** tab has a `Copy status` of *Concept*.

Displayed by selecting:

- **Creating** > **Story Ideas** from the navigation pane OR
- **Story ideas** from the body.

Articles are listed in descending order by issue date then alphabetically by Section and Subsection.

Figure 14: View Story ideas.

In the diagram above, 2005:8 would be August 2005. Articles which have yet To Be Assigned (TBA) to an issue will be at the top of the list.

ii Active briefs

This view lists all articles that have been commissioned, but not yet filed by the author. Overdue articles are also listed; however there is another view specifically for overdue articles. The **`Workflow`** tab has a `Copy status` of *Briefed*.

Displayed by selecting:

- **Creating** > **Active Briefs** from the navigation pane
- **Active briefs** from the body.

Articles are listed in descending order by issue date, then alphabetically by Section and Subsection.

iii Filed copy

This view lists all recent articles that have a status of **filed**. The `Workflow` tab has a `Copy status` of *Filed*.

Displayed by selecting:

- **Creating > Filed Copy** from the navigation pane OR
- **Filed copy** from the body.

Articles are listed in descending order by issue date, then alphabetically by Section and Subsection.

4.9 VIEWS FROM THE EDITING TAB

Available views are:

- Late running copy
- Active briefs
- Filed copy
- Ready for production
- Changes required
- Unassigned copy

i Late running copy

This view lists all articles that have not been filed by their copy deadline. The copy deadline date is entered by the article creator in `Copy deadline` field in the **`Briefs > Details`** tab.

Displayed by selecting:

- **Editing** > **Late copy** from the navigation pane OR
- **Late running copy** from the body.

Articles are listed in descending order by issue date, then alphabetically by Section and Subsection.

ii Active briefs

This view lists all articles that have been commissioned, but have not yet been filed by authors. Overdue articles are also listed; however there is another view specifically for overdue articles. The `Workflow` tab has a `Copy status` of *Briefed*.

Displayed by selecting:

- **Editing** > **Active Briefs** from the navigation pane OR
- **Active briefs** from the body.

Articles are listed in descending order by issue date, then alphabetically by Section and Subsection.

iii Filed copy

This view lists all recent articles that have been filed by authors. The **`Workflow`** tab has a `Copy status` of *Filed*.

Displayed by selecting:

- **Creating** > **Filed Copy** from the navigation pane OR
- **Filed copy** from the body.

Articles are listed in descending order by issue date, then alphabetically by Section and Subsection.

iv Ready for production

This view lists all recent stories which have been edited and are ready for subbing. The **`Workflow`** tab has a `Copy status` of *Submitted*.

Displayed by selecting:

- **Editing** > **Production ready** from the navigation pane OR
- **Ready for production** from the body.

Articles are listed in descending order by issue date, then alphabetically by Section and Subsection.

v Changes required

This view lists all articles needing re-writes or edits, and the status of those articles. Information is taken from the **`Workflow > Change Requests`** tab. If the **`Change Requests`** tab is not filled in the articles will not be listed in this view.

Displayed by selecting:

- **Editing** > **Changes required** from the navigation pane OR
- **Changes required** from the body.

Information displayed is the Volume and Issue number, Section, Article Description. Other information is:

- `Change status`: indicates whether the change has been requested, acknowledged and/or completed.
- `Sent status`: indicates whether a copy of the change request has been sent to the author.
- `Changes`: the changes that are required.

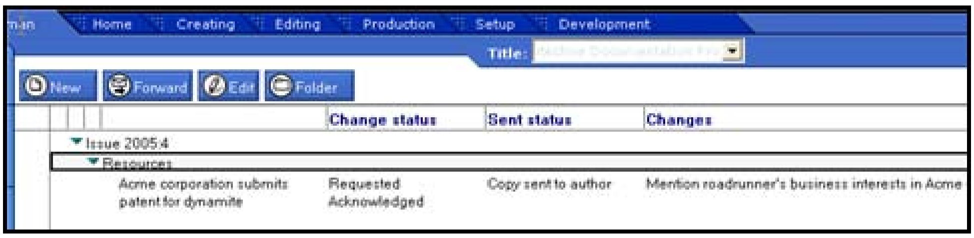


Figure 15: Changes required view

vi Unassigned copy

This view lists all articles which have not been assigned to a particular issue.

Displayed by selecting:

- **Editing** > **Unassigned copy** from the navigation pane OR
- **Unassigned copy** from the body.

Many items listed here will be **library** items – that is, articles that store standard templates and formats which you will use across a publishing title, especially one on the Web.

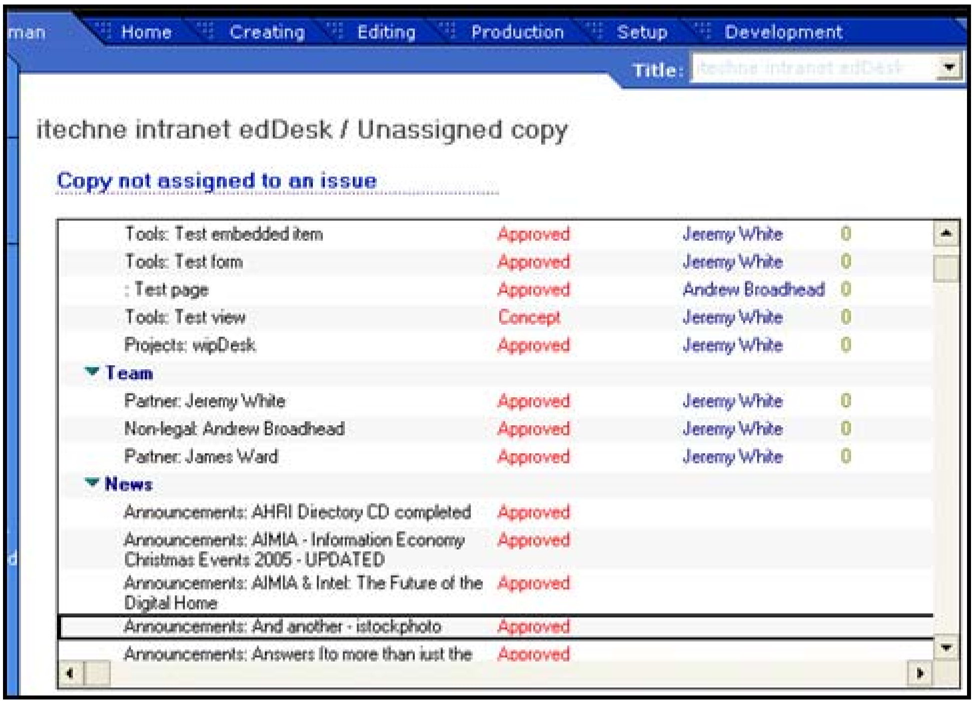


Figure 16: Unassigned copy - showing articles that have not been assigned to a volume or issue

4.10 VIEWS FROM THE PRODUCTION TAB

Views from the **`Production`** tab are mainly used to track articles that have been submitted for editing and are now closer to publishing. Views include:

- Subs work desk / Subbing
- Changes required
- Artist and illustration requirements / Layout
- Production directions (same as Artist and illustration requirements)
- Production schedule
- Deadline calendar (feature being refined)
- Simple export
- Website homepages

i Subs work desk

This view lists recent stories that have been submitted and are in the process of being sub-edited. The **Workflow** tab has a Copy status of *Submitted*.

Displayed by selecting:

- **Production** > **Subbing** from the navigation pane OR
- **Subs work desk** from the body.

Icons next to the article title indicate:

- Editing note has been entered. The text of the note is in the Notes field of the view.
- The article is checked out. This means that only the person who checked it out can save changes).

If an article is both checked out and has an editing note only the checked out icon displays.

Articles are listed in descending order by Volume and Issue, then alphabetically by Section and Subsection.

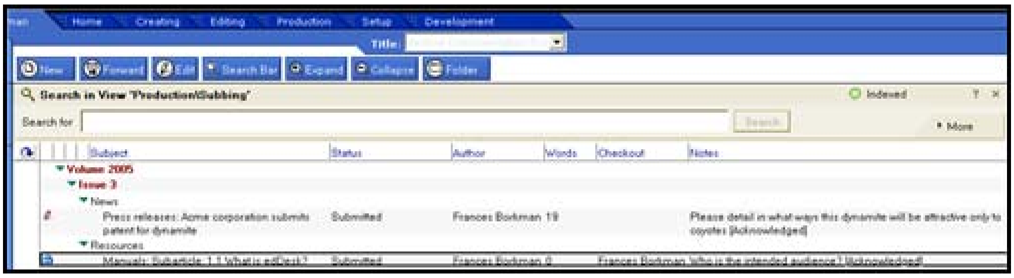


Figure 17: Expanded view of Subs work desk. One article has an editing note; the other is checked out and also has an editing note.

Editing notes

- Articles: Editing notes are entered in the **Workflow** > **Editing notes** tab.
- Subarticles: Editing notes are entered in the **Workflow** tab and Editing notes field. ⓘ see section :13.4 Editing notes for more information.

If the author has Acknowledged or Completed the tasks in the editing note the Acknowledgement/Completion is indicated after the text of the editing note. For example, Please detail in what ways this dynamite will be attractive only to coyotes [Acknowledged].

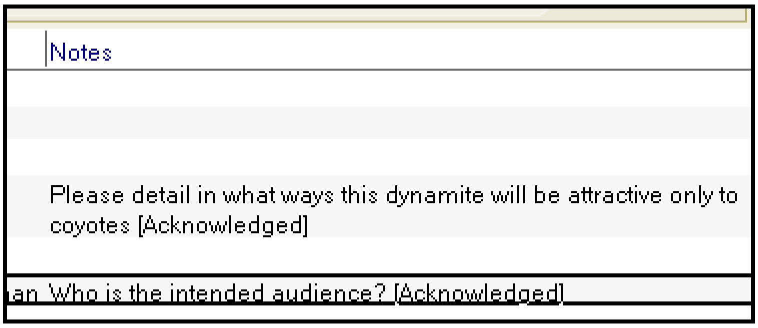


Figure 18: Detail of notes field showing note text and that the editing note has been Acknowledged

ii Changes required

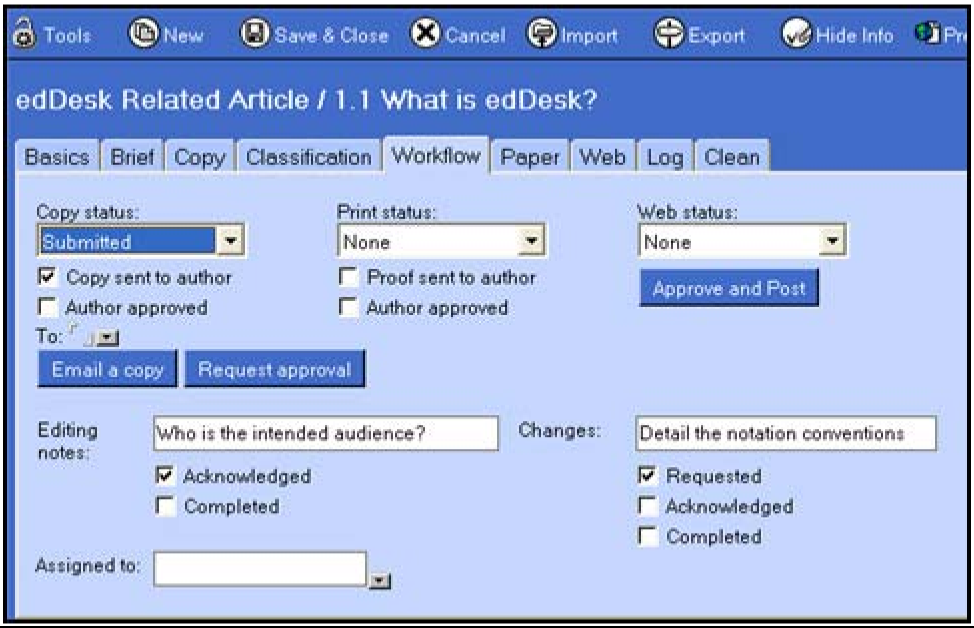
This view lists articles that need rewrites or edits. Information is taken from the **`Workflow > Change Requests`** tab. If the **`Change Requests`** tab is not filled in the articles will not be listed in this view.

Displayed by selecting:

- **Changes required** from the body.

Note

Subarticles are not listed in this view. Subarticles do not have a separate **`Changes Requests`** tab. If changes are requested in subarticles they are entered in the Changes field in the workflow tab.



Information displayed is the Issue number, Section and Description of the article. Other information is:

- Change status: indicates whether the change has been requested, acknowledged and/or completed.
- Sent status: indicates whether a copy of the change request has been sent to the author.
- Changes: the changes that are required (this is entered in the **Workflow > Change Requests** tab.

Figure 19: Changes required view

iii Artist and illustration requirements

This view lists illustration requirements, indicates whether images have been attached to an article and also displays any production directions. Information is taken from the **Paper** tab.

Displayed by selecting:

- **Production** > **Layout** from the navigation pane OR
- **Artist and illustration requirements** from the body.

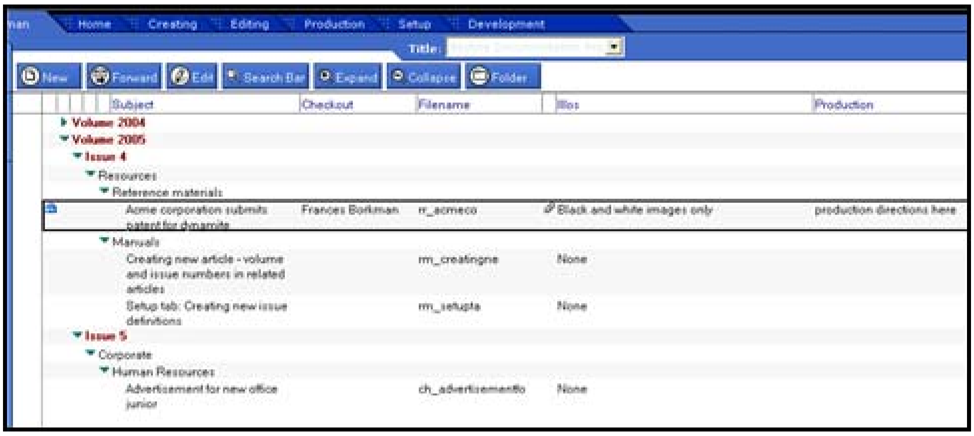


Figure 20: Artist and Illustration requirements view with checked out article selected

Information displayed includes:

- Volume and Issue Number, Section, Subsection and Description
- Checkout: (if the article is checked out the name of the person to whom it is checked out is displayed). There is also a padlock icon at the left of the article description.

- Filename: if you choose to export the file to another program edDesk suggests a filename. The format of this filename is First letter of Section, first letter of subsection, then first word and first two letters of second word from the article description.

  For example you have a file in Section: Resources, Sub section: Reference materials and Description: Acme corporation… edDesk would suggest a filename of rr_acmeco.

- Illos: Illustration instructions are here. A paperclip icon indicates that there are attached images.

- Production: Displays any production directions.

iv Production directions

This is the same as the Artist and illustration requirements view and is being amended.

v Production schedule

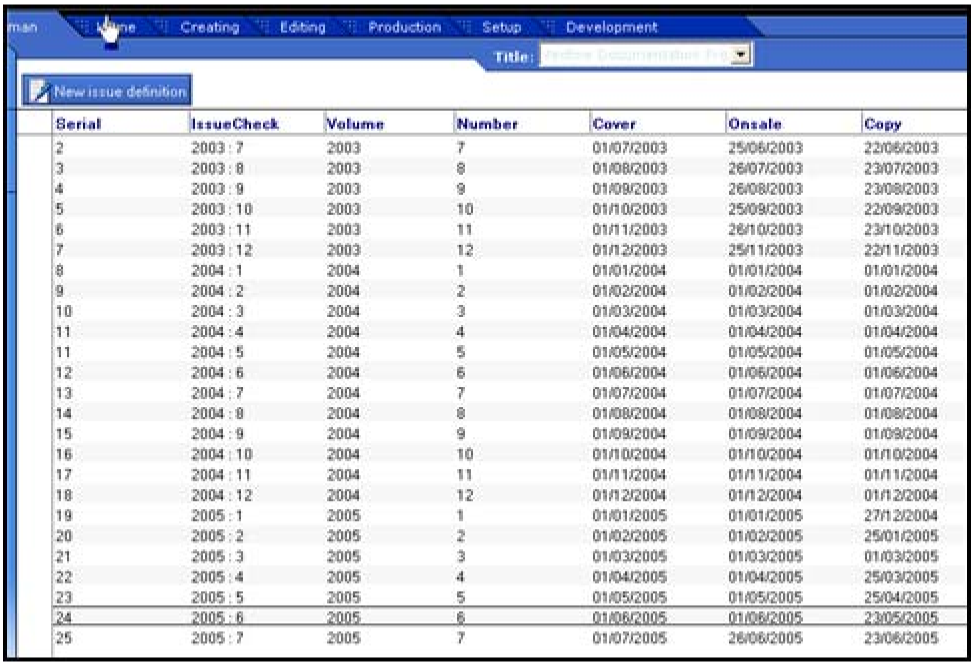
This view lists issue dates, deadlines and important dates.

Displayed by selecting:

- **Production** > **Schedule** from the navigation pane OR
- **Production Schedule** from the body.

You can define new issues in this view. Issues must be defined before they can be selected and added to an article (Volume and Issue are mandatory fields in articles). ⓘ see section 20.5: Production schedule – volume and issue definitions for more information.

Issues are listed in the order in which they were entered into edDesk. This is usually with the oldest issue at the top of the list.



Serial	IssueCheck	Volume	Number	Cover	Onsale	Copy
2	2003 : 7	2003	7	01/07/2003	25/06/2003	22/06/2003
3	2003 : 8	2003	8	01/08/2003	26/07/2003	23/07/2003
4	2003 : 9	2003	9	01/09/2003	26/08/2003	23/08/2003
5	2003 : 10	2003	10	01/10/2003	25/09/2003	22/09/2003
6	2003 : 11	2003	11	01/11/2003	26/10/2003	23/10/2003
7	2003 : 12	2003	12	01/12/2003	25/11/2003	22/11/2003
8	2004 : 1	2004	1	01/01/2004	01/01/2004	01/01/2004
9	2004 : 2	2004	2	01/02/2004	01/02/2004	01/02/2004
10	2004 : 3	2004	3	01/03/2004	01/03/2004	01/03/2004
11	2004 : 4	2004	4	01/04/2004	01/04/2004	01/04/2004
11	2004 : 5	2004	5	01/05/2004	01/05/2004	01/05/2004
12	2004 : 6	2004	6	01/06/2004	01/06/2004	01/06/2004
13	2004 : 7	2004	7	01/07/2004	01/07/2004	01/07/2004
14	2004 : 8	2004	8	01/08/2004	01/08/2004	01/08/2004
15	2004 : 9	2004	9	01/09/2004	01/09/2004	01/09/2004
16	2004 : 10	2004	10	01/10/2004	01/10/2004	01/10/2004
17	2004 : 11	2004	11	01/11/2004	01/11/2004	01/11/2004
18	2004 : 12	2004	12	01/12/2004	01/12/2004	01/12/2004
19	2005 : 1	2005	1	01/01/2005	01/01/2005	27/12/2004
20	2005 : 2	2005	2	01/02/2005	01/02/2005	25/01/2005
21	2005 : 3	2005	3	01/03/2005	01/03/2005	01/03/2005
22	2005 : 4	2005	4	01/04/2005	01/04/2005	25/03/2005
23	2005 : 5	2005	5	01/05/2005	01/05/2005	25/04/2005
24	2005 : 6	2005	6	01/06/2005	01/06/2005	23/05/2005
25	2005 : 7	2005	7	01/07/2005	26/06/2005	23/06/2005

Figure 21: Production schedule view

Information displayed includes:

- Serial: only used in edDesk – each issue is assigned a sequential number used to order the issues.
- IssueCheck: displays the Volume:Issue details. For example 2003:7 would be Volume: 2003 Issue number 7.
- Volume: volume of publication.
- Issue: Issue number
- Cover: Date that will appear on the cover of a printed article.
- Onsale: Date the publication goes on sale
- Copy: Date by which copy must be submitted for editing.

vi View deadline calendar

This feature is being reviewed. It currently displays no information.

vii Deadlines

This view lists deadlines, with the most recent/future deadline at the top of the list and the oldest deadline at the bottom. **Deadlines** is important for managing the flow of articles through edDesk and for checking that your team is on schedule to meet production targets.

Displayed by selecting:

- **Production** > **Deadlines** from the navigation pane.

Deadline dates are taken from the Copy deadline field in the **`Briefs > Details`** tab.

You can add new articles and edit existing articles from this tab.

Information displayed includes:

- Deadline: Date specified for the article to be filed.
- Subject: Subject of the article.
- Status: Article status (from the **`Workflow`** tab).
- Author: article author.
- Issue/Section: Information is Volume/Issue/Section/Subsection.

viii Simple export

This view lets you select an article and export it to your computer in the following formats:

- ASCII text file – very basic formatting only. Your fonts, lists etc are not retained.
- RTF (Rich Text Format) – retains your formatting. Do not use this if you have images attached or imported into your article as they do not display correctly.
- CGM (Computer Graphics Metafile) – only use this if your article contains CGM images.
- TIFF (image) – only use this if your article contains bitmap images.

Displayed by selecting:

- **Production** > **Simple Export** from the navigation pane.

1. Select *Simple Export* from the navigation pane. A list of all the articles in your database is displayed.

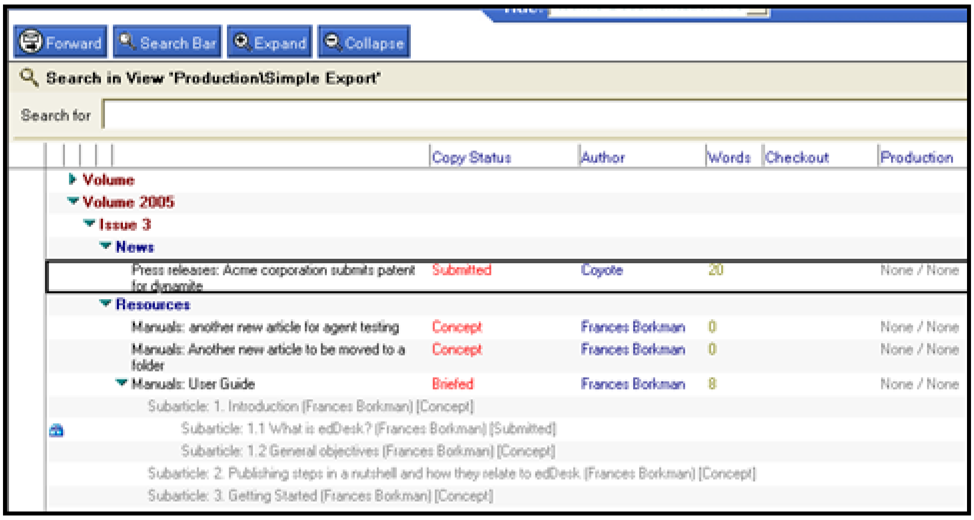


Figure 22: Simple Export view.

2. Double click on the article you want to export to another format. The article opens in an **`Export`** tab.

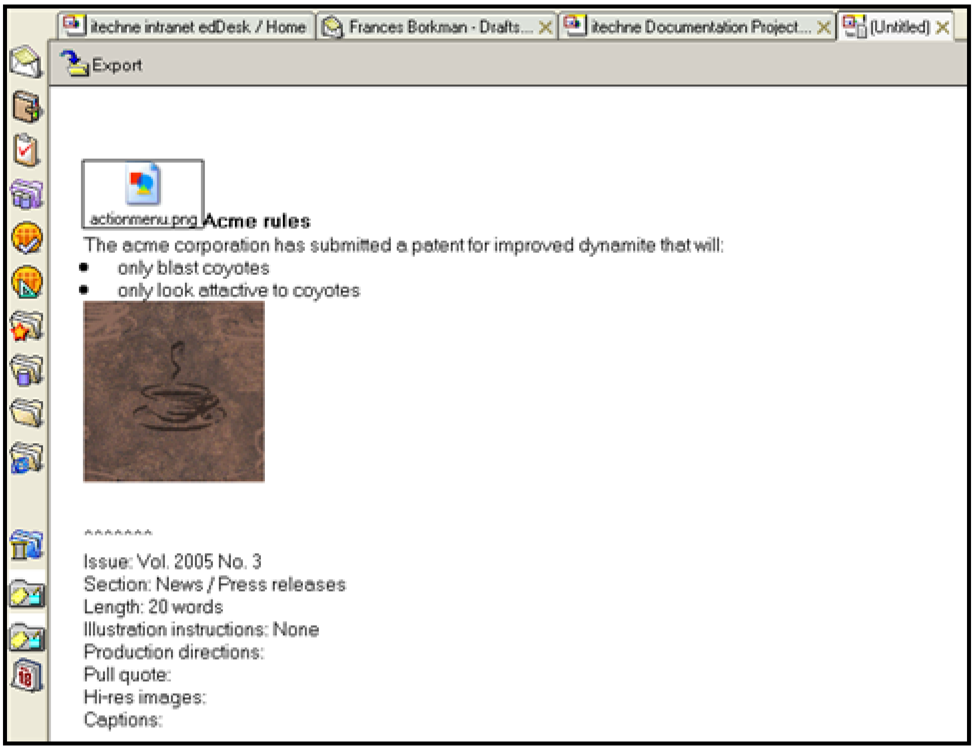


Figure 23: Article is opened and you can now export it to a different format. The article in this screen capture has one attached image and one imported image.

3. Click on <*Export*>. An **Export** dialogue box displays with the export directory being the directory you used most recently.
4. Navigate to the directory to which you want to export your file.
5. File name: Enter a filename for your exported file.
6. Save as type: Select a file type from the list. Your choices are:
   - ASCII text
   - CGM image
   - Microsoft RTF
   - TIFF 5.0 image
7. Click on <*Export*>.
8. If you selected the ASCII filetype the **Text File Export** dialogue box is displayed, letting you select options for this filetype.

Figure 24: Text File Export dialogue box. Best to leave the options as the default ones (as shown).

9. Leave the options as they are – it will work just fine!
10. Click on *<OK>*.
11. Your file is exported.

ix Homepages

Important

Only use this option if you are creating or editing homepages for internet or intranet sites.

ⓘ see <u>Chapter 14: Editing homepages</u> for instructions on maintaining homepages.

4.11 Views from the Setup tab

Views from the **`Setup`** tab are used for the non technical administration of edDesk. This is mainly for adding items that appear in dropdown lists within articles.

ⓘ see <u>Chapter 20: Non-technical administration of edDesk</u> for instructions on using the **`Setup`** tab.

5. Searching for articles

You can search for articles that match your criteria. You must be in a view to search for articles. Later versions of edDesk will let you search from the navigation pane, without having to select a view to search in. This will mean that you can easily search your entire database.

5.1 OBJECTIVES

By the end of this chapter you should be able to:

- open the search bar from within a view
- enter words and phrases as your search criteria
- use the Boolean operators – AND, OR, NOT
- use wildcards
- use a simple search to find articles containing particular words
- use the advanced search feature to find articles matching criteria that you specify.

5.2 SEARCHING IN VIEWS

You can use the **Search** form in many views to list only those articles that match your criteria.

For example, you have selected the view All Issues but only want to view those articles which contain the word "payroll". You would use Search to list only those matching articles.

Views filter the articles so only those that match the view criteria are displayed. When you use Search you are refining the criteria and looking for articles in that view.

Searching all articles

Use the view All Issues (available from the Navigation pane in every tab) if you want to search through your entire database.

Searching all entries

Use the view All Documents (available from the navigation pane in the Home tab) to list all items in your database. This is particularly useful if you have created an entry and cannot remember where you put it (ie. What section and subsection, volume or issue you entered) or whether it was created as an article or library item.

5.3 OPENING THE SEARCH BAR

You need to open the **Search** bar before you can conduct your search.

1. Go to the view in which you want to search.
2. Click on *<Search Bar>*.
3. The **Search** bar displays, as below.

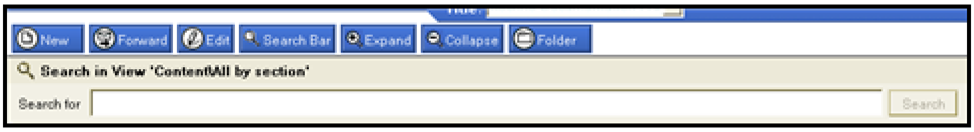


Figure 25: Search bar in view "Sections"

5.4 TEXT SEARCH OPTIONS

This section instructs you how to format your search text. All text entered is entered in the Search for field.

i Searching for a single word or a phrase

1. Put your cursor in the Search for field.
2. Type the word or phrase to search for.
3. Click *<Search>*.

> **Common words**
>
> If you search for common words you will probably return a long list of matching articles. Then you either have to navigate to the ones you want, or try to further refine your search.
>
> Very common words, such as "the" will be ignored by the search engine.

ii Using Boolean operators – AND, OR, NOT

edDesk's operators are similar to the Boolean operators used by most search engines on the web. They are not case sensitive – AND, and, And are the same.

AND

The AND operator finds articles which contain all the words linked by AND. The words may appear in any order, in phrases or in isolation.

Example 1: **digital AND camera AND quality** will find all articles that contain all three words.

Example 2: **digital camera AND quality** will find all articles that contain the phrase 'digital camera' and the word 'quality'.

1. Click in the Search for field.
2. Type the first word or phrase.
3. Type AND.
4. Type the next word or phrase.
5. Repeat steps 3 and 4 until you have typed all the words to search for.

6. Click <*Search*>.

OR

The OR operator finds articles which contain either of the words or phrases. Your results are listed in order with the most occurrences at the top of the list.

The OR operator returns a longer list of articles than the AND operator. The more words you have separated by the OR operator, the longer the list of resultant articles will be.

Example 1: **digital OR camera** will find all articles that contain at least one of the words.

Example 2: **digital OR camera OR dog** finds all articles that contain at least one of the words. This is likely to be a longer list than in example 1.

1. Click in the Search for field.
2. Type the first word or phrase.
3. Type `OR`.
4. Type the next word or phrase.
5. Repeat steps 3 and 4 until you have typed all the words to search for.
6. Click <*Search*>.

NOT

The NOT operator makes your search query negative. You are saying that you want to find articles that do NOT contain particular words or phrases. NOT is usually used in conjunction with AND.

Example 1: **digital AND NOT camera** finds all articles that contain the word ‘digital’ but not the word ‘camera’.

Important

You must type in AND before NOT. If you don’t you will receive an error message “`Query is not understandable`.”

1. Click in the Search for field.
2. Type the first word or phrase.
3. Type `AND NOT`.
4. Type the next word or phrase.
5. Click <*Search*>.

5.5 SLIGHTLY MORE COMPLEX SEARCHES

This section instructs you in performing more complex searches, using a combination of operators and wildcards.

i Determining the order in which your search criteria is processed

Parentheses are used to tell edDesk which order to process your search criteria. The part of your search criteria enclosed in parentheses is processed before parts outside the parentheses.

Example 1: **(digital AND camera) OR photograph** finds all articles that contain both the words ‘digital’ and ‘camera’ or the word ‘photograph’.

Example 2: **(digital OR camera) AND (photograph OR magazine)** finds all articles that contain at least one of ‘digital’ or ‘camera’ and at least one of ‘photograph’ or ‘magazine’.

ii Wildcards

**** (asterisk)***

The * is used as a wildcard. It represents any number of letters. The * is particularly useful if you want to search for a word that may have a variety of endings, or a variety of standard spellings. It does not work with numbers.

Example 1: **swim*** finds swim, swims, swimming

Example 2: ***one*** finds any word with the letters ‘one’ – one, sandstone, cone and so on.

Example 3: **mari*uana** finds both marijuana ,marihuana and ‘Maria iguana’

? (question mark)

The ? represents a single letter. It does not work with numbers. You can use more than one ? wildcard in your search criteria.

Example 1: **?ick** finds lick, sick, hick and so on

Example 2: **clo??** finds, cloth, clock and so on

Example 3: **mari?uana** finds both marijuana and marihuana

5.6 ADVANCED SEARCH

The search bar lets you search for articles containing various words, phrases and combinations of these. If you want to further control your search criteria there is a more advanced search feature available.

> **Note**
>
> Advanced means that you can do more, not that it is harder to use.

1. Go to the view in which you want to search.
2. Click on <*Search Bar*>.
3. The **Search** bar displays, as below.

Figure 26: Search bar with More expandable menu at bottom right of search bar.

4. Click on <*More*>.

5. The **Advanced search** bar displays.

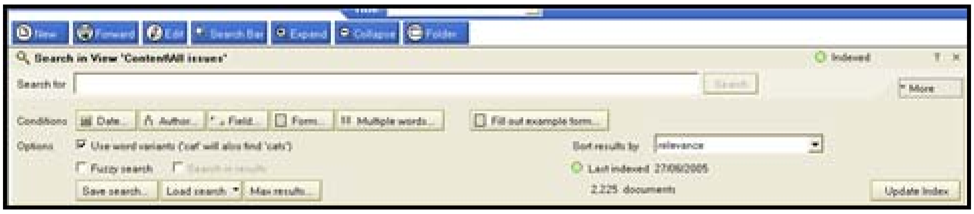


Figure 27: Advanced search bar

6. Search for: enter the text to search for. ⓘ see section 5.4: Text search options and section 5.5: Slightly more complex searches

7. Refer to the following sections for detailed instructions on completing the search form.

i Conditions

This is a very powerful part of the advanced search. Remember that the more conditions you add to a search, the more your results will be limited (expect fewer results with more conditions).

Only the most commonly used (and most useful) conditions are explained here.

Date

If you want to limit your results to only those articles with certain created or modified dates then use this condition.

1. Click on <*Date…*>.

2. The **Add Condition** dialogue box displays as below.

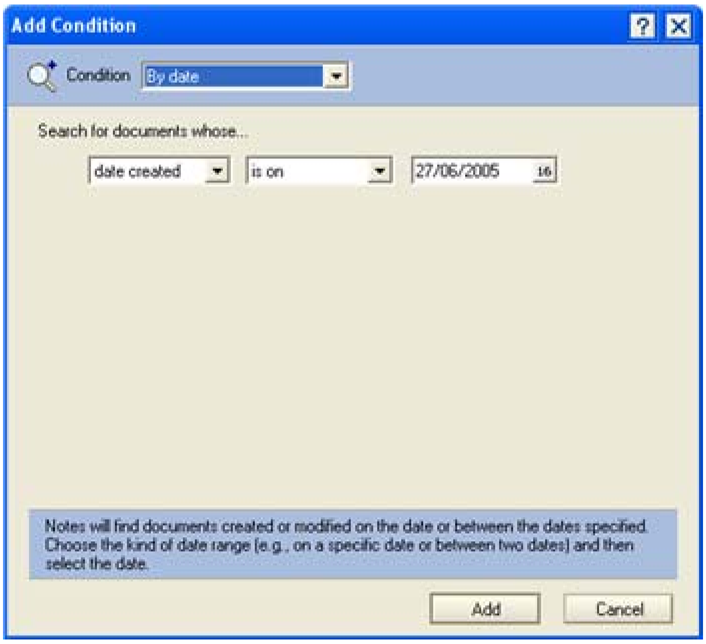


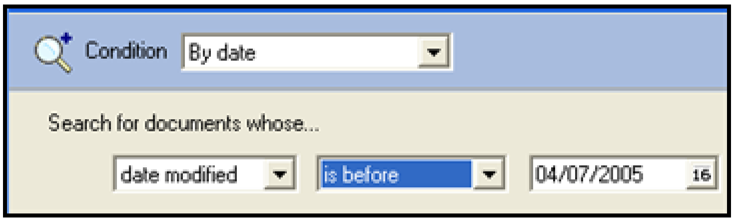
Figure 28: Default values in Date condition dialogue box

3. Condition: lets you select a range of conditions for articles to match. At the moment you have selected *By date*.

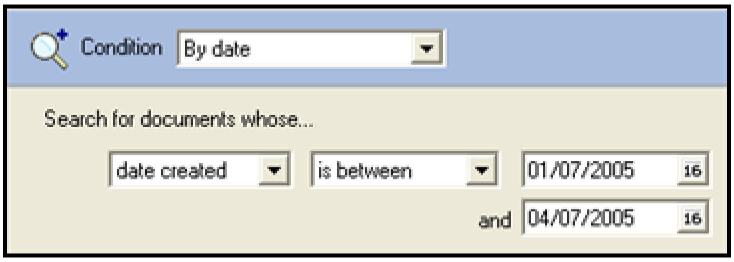
4. Search for document whose…: the options you see depend on the selected condition. The default for the condition *By date* is to search for articles created on the current day.

   Click on the dropdown arrows to change the details.

   Example 1: date modified is before 04/07/2005



   Example 2: date created is between 01/07/2005 and 04/07/2005



5. Click on <*Add*> to add the condition to your search criteria.

Author

You can add the Author condition to find articles by particular people or to exclude articles by particular people.

1. Click on <*Author*>.
2. The **Add Condition** dialogue box displays as below.

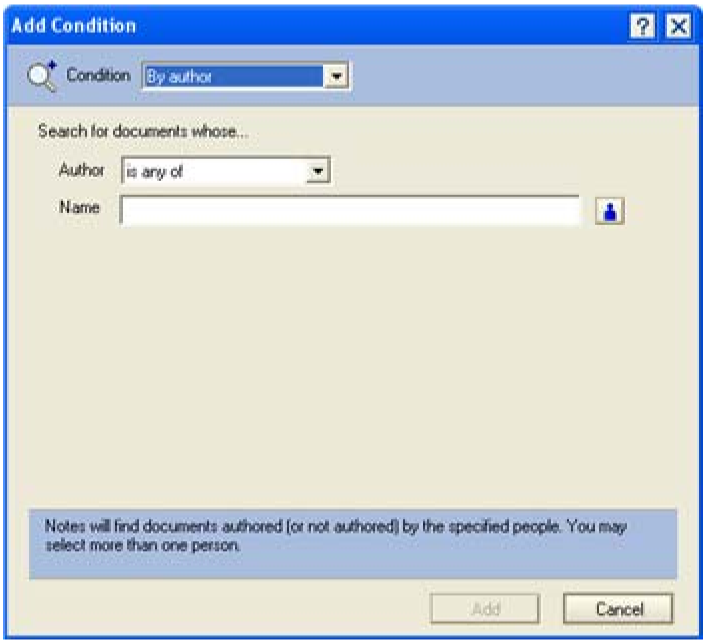


Figure 29: Default values in Author condition dialogue box

3. Condition: your currently selected condition is *By author*.
4. Author: select from:
   - *is any of* to find articles by particular authors
   - *is not any of* to find articles that are NOT by particular authors
5. Name: Click on the  to see a list of authors in your organisation.
   a. Select each author and click on <*Add*>.
   b. Click <*OK*> when you have selected the required authors.
6. Click on <*Add*> to add the condition to your search criteria.

Fill out example form

If you do not feel confident to add conditions then use the *Fill out example form* option. This lets you enter your conditions in a screen that looks like an article. You can click on the article tabs to navigate to the required fields.

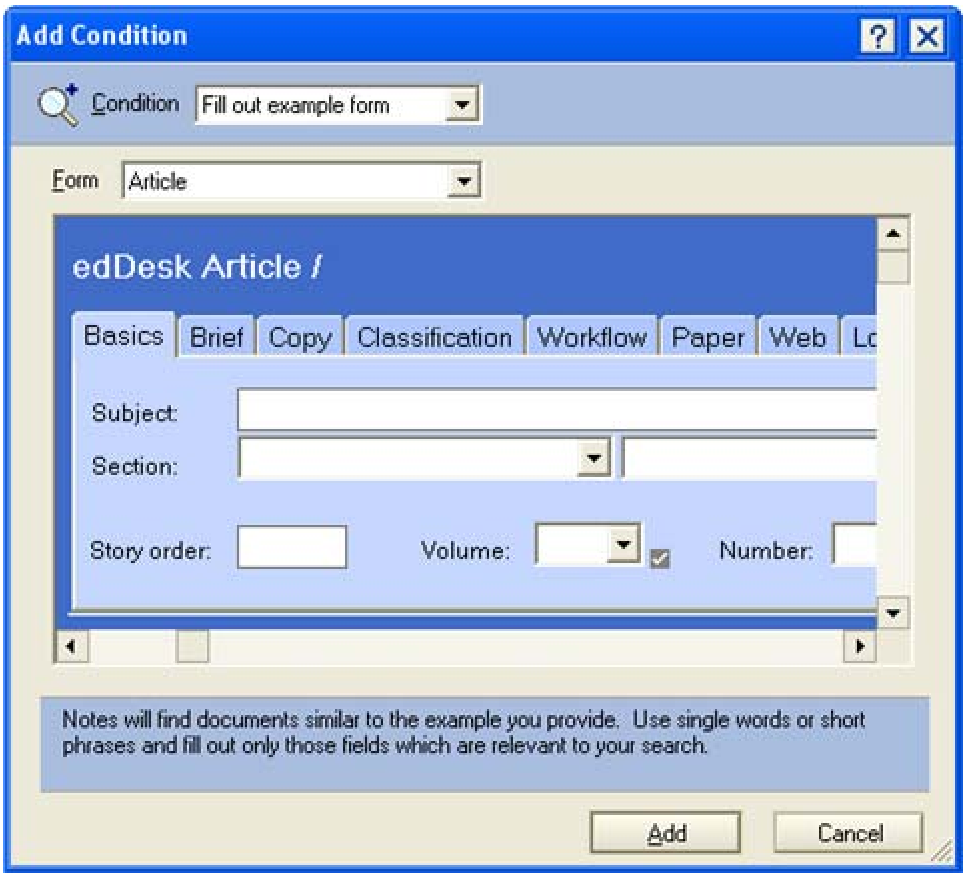


Figure 30: Default values for Fill out example form dialogue box

1. Click on the tab that contains the information you want to search by.
2. Enter your search criteria by:
   - Typing into the field – for example subject of acme. OR
   - Selecting it from a list of options – for example articles that have the copy status of concept.
3. Click on <*Add*> to add the example form to your search criteria.
4. The advanced search screen displays with the Search for field now containing “*matches example form*”.

Multiple words

Multiple words is a different (and simpler) way of searching for multiple words or alternative words. If you don't like using the Boolean operators AND and OR then use this form instead.

1. Click on <*Multiple words…*>.
2. The **Add Condition** dialogue box displays as below.

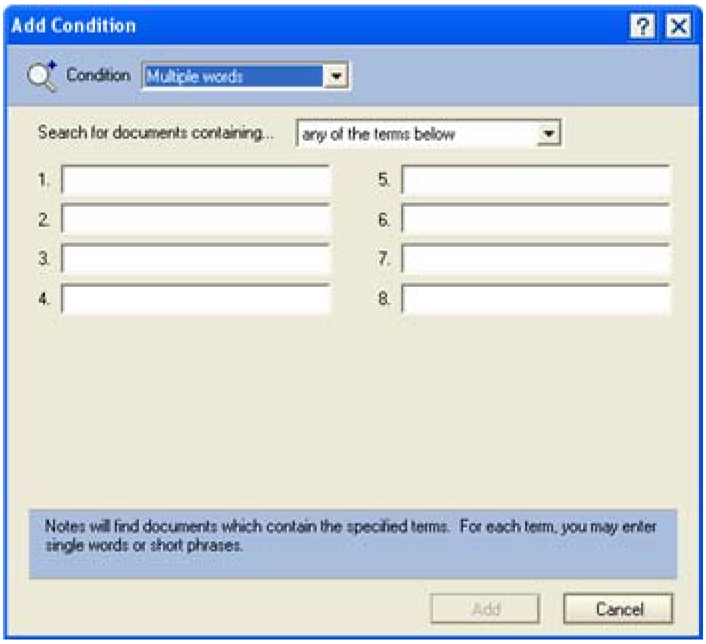


Figure 31: Default values in Multiple words condition dialogue box

3. Search for documents containing…
   - any of the terms below – same as using OR. This finds all articles that contain at least one of the words you enter.
   - all of the terms below – same as using AND. This finds all articles that contain ALL of the words you enter.
4. Click on <*Add*> to add your words to the search criteria.

ii Editing your conditions

You may have entered some search conditions that you want to change, without having to enter them completely again.

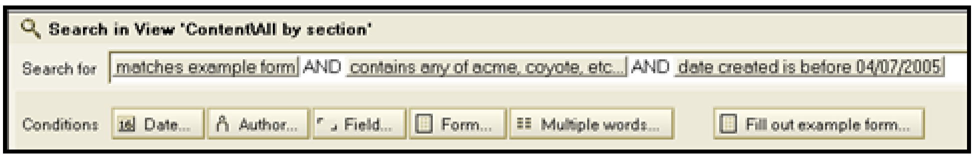


Figure 32: Current conditions for this search

1. Click once on the condition to be edited. This selects the condition.
2. Double-click on the condition.
3. You are taken to the dialogue box with the condition.

4. Make your edits.
5. Click on <*Add*> to accept your edits.

iii Options

There are two text search options available in Advanced search.

Use word variants

Tick this option to find any base word with certain suffixes.

For example swim also finds swims, swimmer but not swam or incorrect words.

Fuzzy search

Tick this option to find words and phrases that are similar to your search criteria. This is particularly useful if you don't know exactly how something could be phrased.

For example, communication also finds articles with communicate, communicated. User requirement also finds articles with user group requirement.

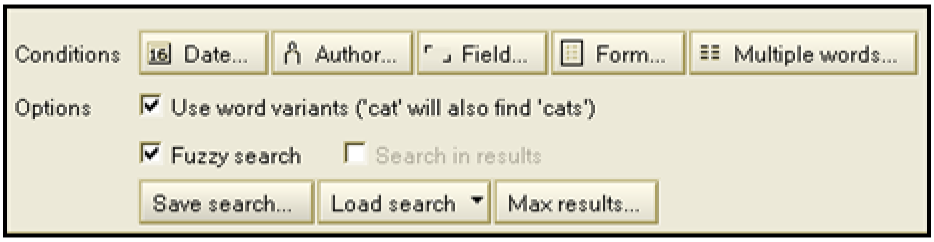


Figure 33: Advanced search with the options Use word variants and Fuzzy search selected

iv Navigating through your search results

After you conduct your search you see a list of all matching articles. You can see your search criteria in context in each article. Each search term is highlighted, with the currently selected term highlighted in pink and other terms highlighted in green.

If you can't find a search term in the article consider that...

Matching text in the Subject field is not highlighted.

If a term appears only in the article's metadata you will not see highlights.

If a term appears in an attached filed the title of the attached file is highlighted.

Your index needs to be updated. See section 15.5: Updating an index.

1. Click on the required article. Your article is opened with the earliest occurring search term displayed on screen.
2. To move to the next term: press <*Ctrl*>**+**
3. To move to the previous term: press <*Ctrl*>**-**

v Saving searches

If you have searches that you perform frequently you may save them. This means that you do not have to enter the criteria each time you want to perform that search.

1. Click on <*Save search…*>.
2. The **Save Search** dialogue box displays.

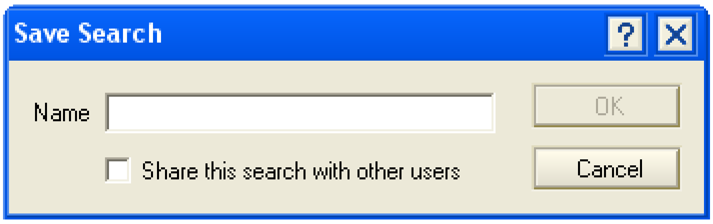


Figure 34: Save Search dialogue box

3. Name: type in a name for your search. Make it a meaningful name – so you know what the search is for.
4. Share this search with other users: Tick this box if you want other people with access to your database to be able to use this search.

> **Share this search with other users**
>
> Only some people have permission to select Share this search with other users.
>
> If you do not have permission you will get an error message "`You are not authorized to perform this action.`"

5. Click <*OK*>.

vi Using your saved searches

Saved searches must be "loaded" before you can use them.

1. Click <*Load Search*>.
2. A list of your searches displays.

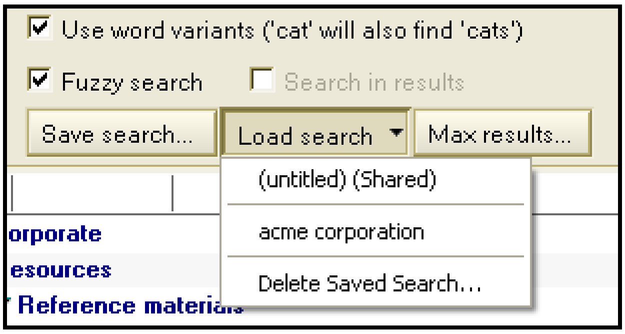


Figure 35: List of currently saved searches - acme corporation

3. Click on the required search.
4. Enter any other criteria.
5. Click on <*Search*> to conduct your search.

vii Deleting saved searches

When you have finished with a saved search (and don’t need it again) you can delete it.

1. Click on <*Load Search*>.
2. Click on *Delete Saved Search*.
3. Click on the search to be deleted.
4. Click on <*Delete*>.

6. Creating an article that is ready for briefing out

This chapter introduces you to creating articles, entering briefing instructions, then briefing out your article.

ⓘ see Chapter 7: Entering copy into edDesk for more information on editing and formatting articles.

Some organisations brief out using edDesk, others just send an email, or phone the contributor. This chapter is relevant to those organisations that do brief out using edDesk.

6.1 OBJECTIVES

By the end of this chapter you should:

- know what an article is
- be aware that you can have an hierarchy of “related articles”
- be able to create articles containing briefing instructions
- be able to brief out your article by email.

Please see Chapter 12: Creating hierarchical content – related articles for information and instructions about creating related articles.

6.2 WHAT IS AN ARTICLE?

An article is a story, or part of a big story. Articles contain the **content**. Content includes:

- briefing instructions
- printing instructions
- web publishing instructions
- workflow
- attached files, including graphics and PDFs
- text of each article.

Related articles

Articles may be part of a hierarchy of “related articles”. You can have a “parent” article, usually general information or an introduction, and then create “children” for more specific information. The children can have children of their own – a whole “family”. A hierarchy makes it easy to order your story, move the separate elements around and insert more related articles.

edDesk displays the related articles (parents and children) with the children indented under the parent. You can have as many indented levels as you need.

The diagram below has the following hierarchy:

- **Parent** - article entitled “Digital camera review”

- **Children** – subarticles entitled
  - “Camera 1”
  - “Camera 2”
  - “Camera 3”
  - “Camera 4”

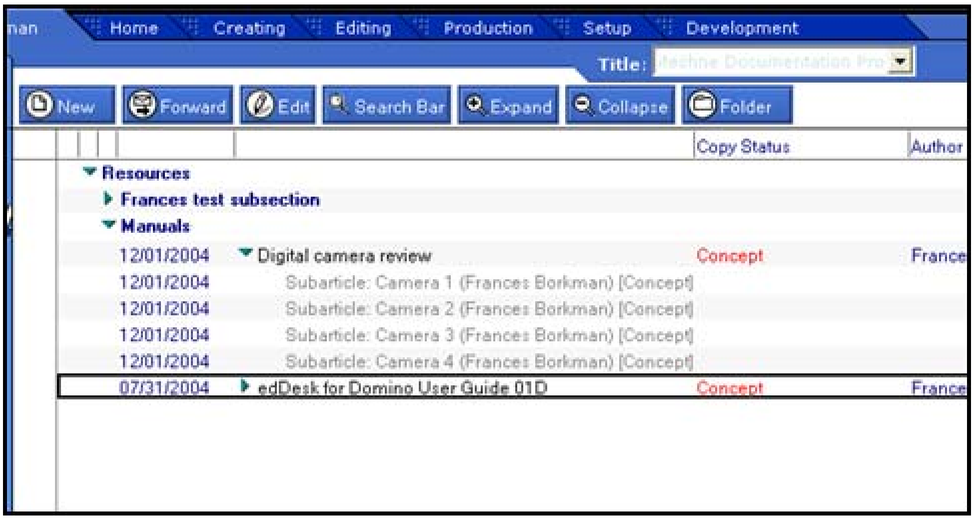


Figure 36: Parent and Child articles

6.3 CREATING AN ARTICLE WITH BRIEFING INSTRUCTIONS

One of the first things an editor needs to do is decide what sort of story is needed. An edDesk article is then created with appropriate instructions so that the author can submit an article that meets the stated requirements.

Each story is created in a separate article with its own briefing instructions.

1. Go to either the edDesk **`Home`** tab OR the **`Creating`** tab.
2. Click on *New article*.

Selecting “New Article”

New Article can be accessed in several ways:

* From the left navigation pane

* From the body area of the page

* When viewing All Issues you click on the dropdown button “New” then select “Article”.

3. The **Article** form opens, as below.

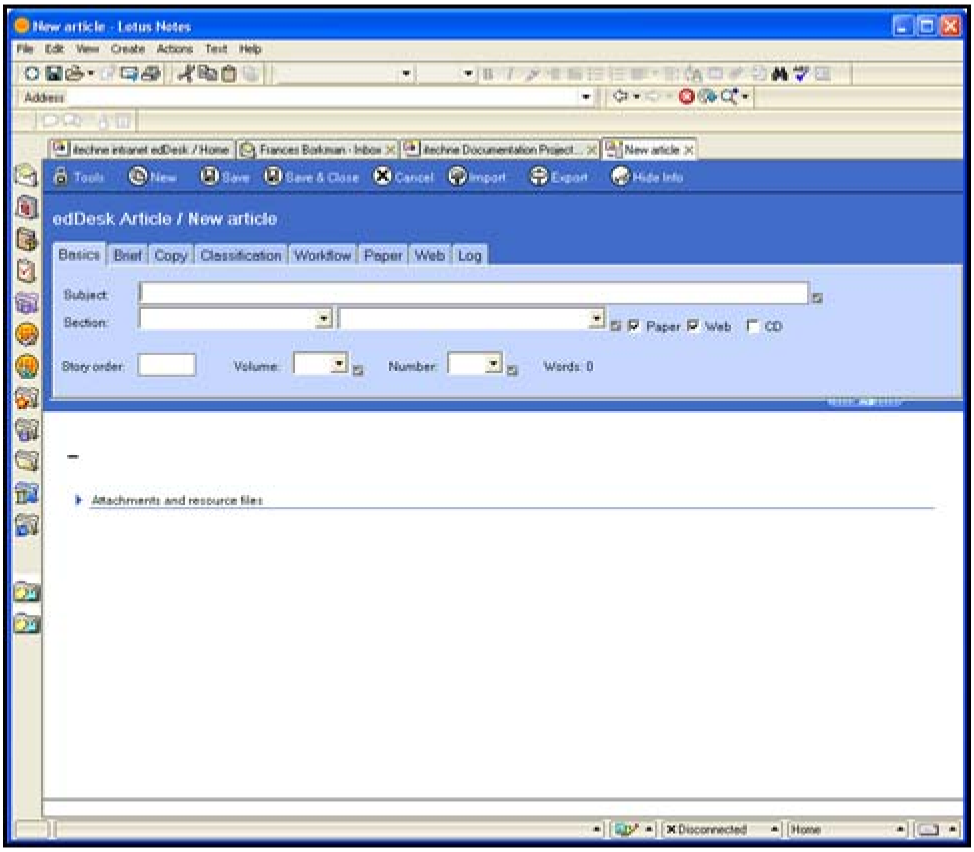


Figure 37: Article form - Basics tab active

4. You will see that there are several tabs along the top of the **Article** form. At this stage you only need to enter information in two of those tabs – **`Basics`** and **`Brief`**.

i Mandatory fields

You may notice that several of the fields have ticks next to them. These indicate mandatory fields. Mandatory fields must be completed before you can save the article.

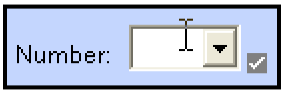


Figure 38: Example of mandatory field - note the tick

ii Basics tab

The **`Basics`** tab contains general information about the article. This tab must be completed before you can save your article.

1. Subject – Enter a description of what the article is about. Make sure that whatever you type here will be meaningful to all people working with the publication that this article will appear in. The subject displays in navigation on the published website.

2. **Section** – Click on the dropdown arrow . Select the section of the publication in which the article will appear.

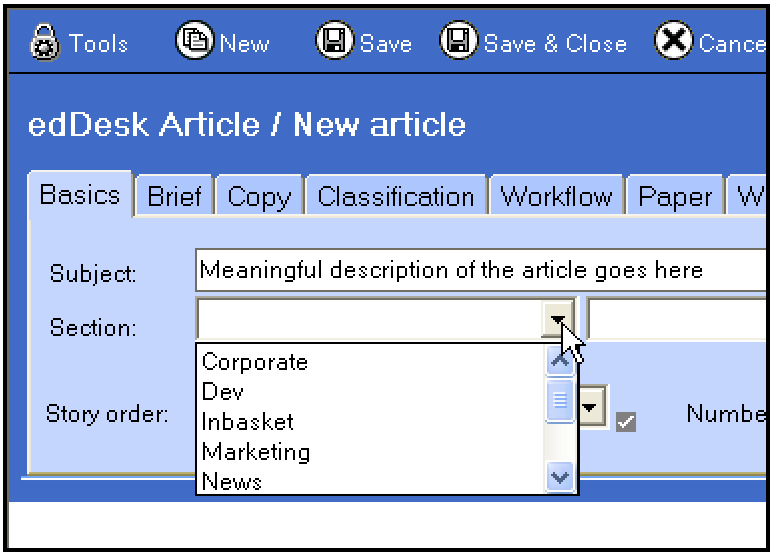


Figure 39: Sample dropdown list for Sections

3. **Subsections** - The dropdown menu next to **Section** now contains a list of subsections relevant to the section you selected. Click on the dropdown arrow for the subsection menu and select the required subsection in which the article will appear.

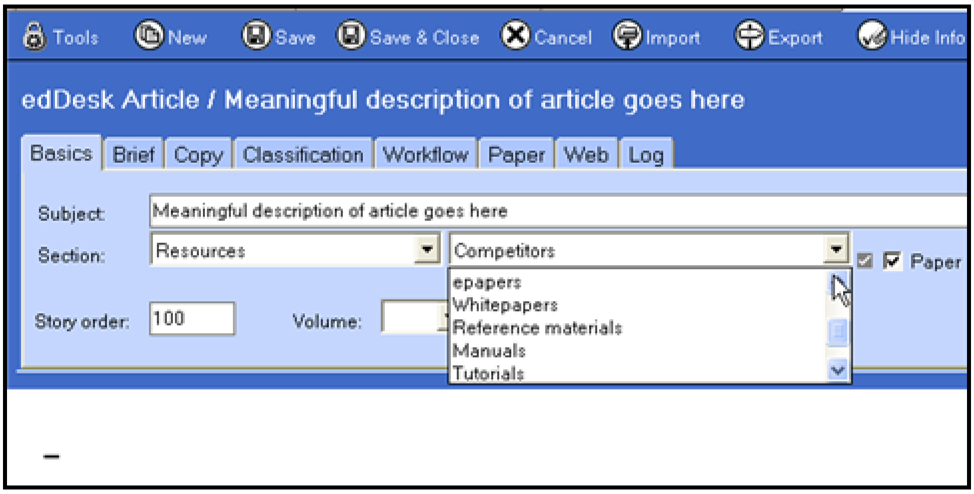


Figure 40: Sample dropdown list for Subsections

4. **Paper / Web / CD** – Select the media in which the article will be published. The default is *Paper* and *Web*.

5. **Story order** – This numerical field is used to control the order in which your stories appear in an issue or for a particular date. The default value is 100. If you are creating several articles for an issue use century numbering.

Default order

If you leave this field blank the default order is alphabetical within an Issue or where articles have the same date.

Century numbering

Century numbering means that you would number articles as 100, 200, 300 etc. This makes it easy to insert articles between other articles without having to renumber every article after the one you insert.

You would use 150, 250, 350 as the numbers for inserted articles. This would have the effect of having your articles ordered as 100, 150, 200, 250, 300, 350 and so on.

ⓘ see section 12.3: The importance of Story Order in a hierarchy for more information.

6. Volume – Select the required volume from the dropdown list. Usually each year will be a separate volume.

7. Number – Select the required issue number from the dropdown list. Issue numbers assume that January is Issue 1, February is Issue 2 and so on.

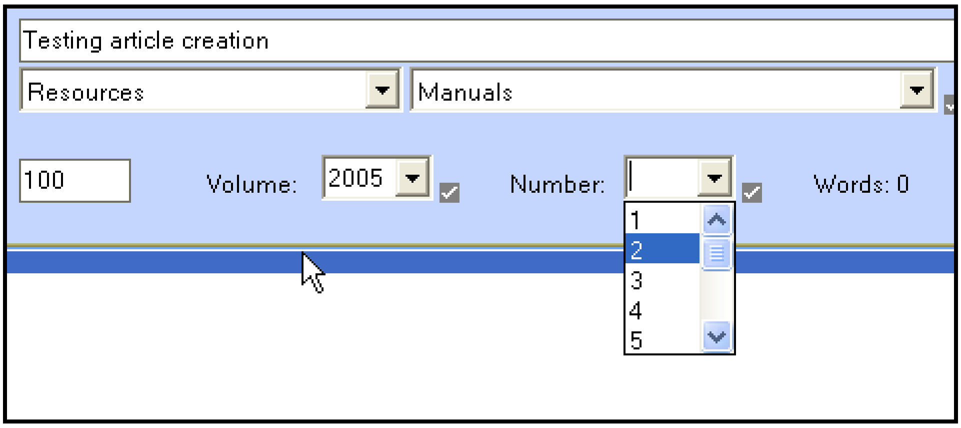


Figure 41: Volume 2005 with list of issue numbers available

iii Brief tab

The **Brief** tab contains details of the brief that is to be sent to an author. The **brief** tab is divided into several tabs for particular information.

1. Click on **Brief**.
2. The **Details** tab displays.

Figure 42: Initial view of Brief > Details tab

Details

1. Author – the person who will be writing the copy. If you want to select an author already in your Address Book you can click on <*Add Author*> and select them from a list. Otherwise, type in the author's name.

> **Important**
>
> After you add an author they are listed in the Authors view, so make sure you enter their name accurately.

2. Email – the email address of the author you are briefing. When you have entered your instructions and saved the article you can click on <*Email brief*> to send the brief to that author.

3. Copy deadline – This is the date by which copy has to be filed.

> **Date format**
>
> The date format is American – that is month/day/year

If you click on the number next to the date a popup calendar is displayed. Scroll to the copy deadline needed and click. This selects the date and ensures that it is in the correct format.

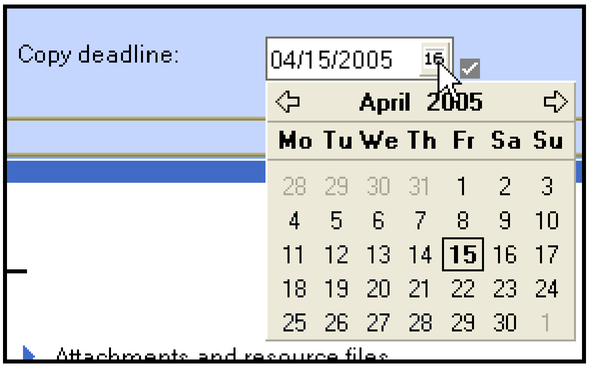


Figure 43: Popup calendar displayed for copy deadline

Rights

This tab contains information about the publishing rights to the article.

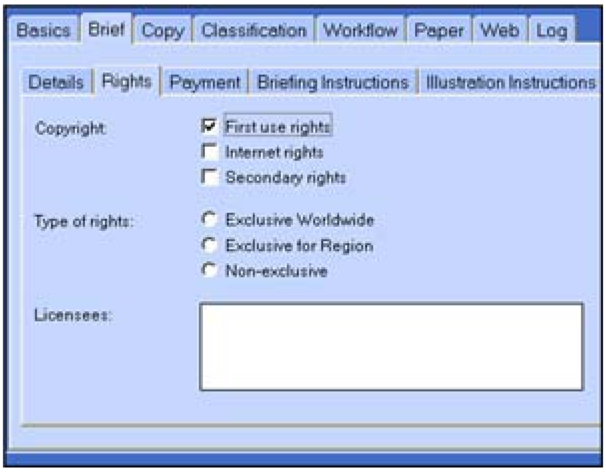


Figure 44: Initial view of Brief > Rights tab

1. Copyright – The default is for *First use rights*. Click in the boxes required if you want other copyright rights.

2. Type of rights – you can only select one type of right. Click on the required rights type.

3. Licensees – If there are licensees enter their details.

Payment

This tab contains payment details for the article.

Figure 45: Initial view of Brief > Payment tab

1. Article type – You may only select one article type. The default is *Staff*. If you select another type you may have other payment options available.

   For example if you select "Freelance" as the article type you can enter the specific payment rate per thousand words and also select whether to cap the payment (useful if an author submits an article which is longer than commissioned).

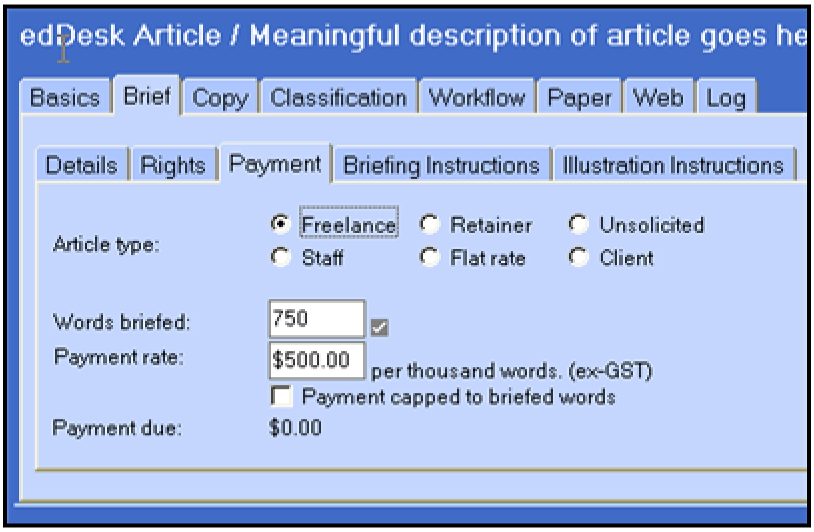


Figure 46: Payment tab after selecting Freelance article type

2. Words briefed – Enter the desired length of the article. The default is *750*.

3. Payment rate – Enter the payment rate per thousand words. This option is only available if you select *Freelance* or *Flat rate* as the Article type.

   - *Payment capped to briefed words* – select this if you want to cap the payment to the number of words briefed even if an author submits copy that is longer than commissioned.

4. Payment due – this amount is automatically calculated from the number of words in the body of the article.

Briefing instructions

Type the briefing instructions in this tab. Make sure your instructions are clear, so that anyone working on the article will understand the requirements.

Briefing instructions are emailed to the author when the article is briefed out.

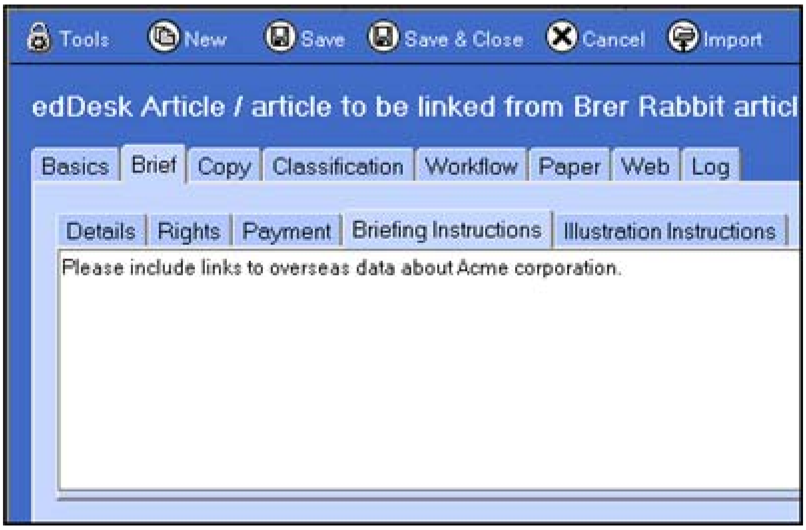


Figure 47: Briefing instructions tab

Illustration instructions

Type the illustration instructions in this tab. Make sure your instructions are clear, so that anyone working on the article will understand the requirements.

Illustration instructions are emailed to the author when the article is briefed out.

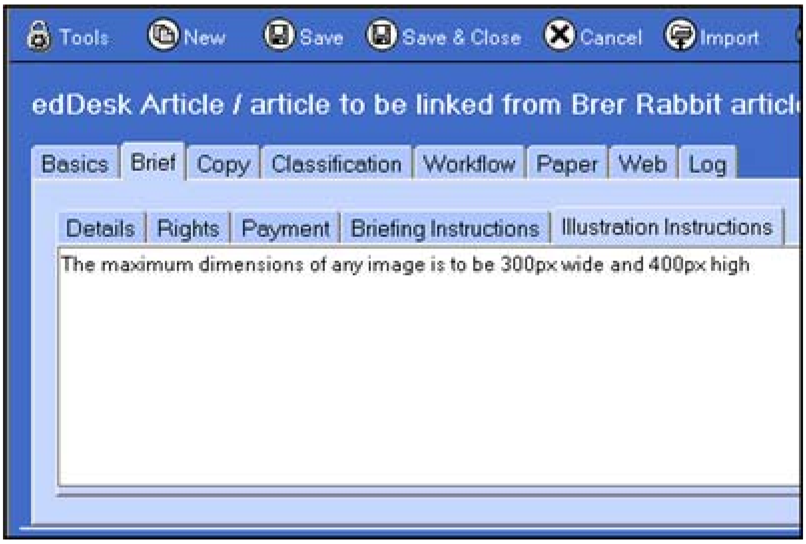


Figure 48: Brief > Illustration Instructions tab

6.4 SAVING YOUR NEW ARTICLE

After you have filled in the required fields in the **`Basics`** and **`Brief`** tabs your article is ready to be saved.

Save before briefing out
You must save your article before you can email the brief to the required author.

1. Look at the toolbar along the top of your article form.

Figure 49: Editing article toolbar

2. You have two Save choices:

   a. **Save** – where you want to save your article and continue working on it.

   b. **Save & Close** – where you want to save your article and have finished working on it (for now). If you want to email the brief to the author now do not use this option (as you will have to reopen and edit the article in order to send the brief).

3. Click on <*Save*> or <*Save & Close*>.

6.5 BRIEFING OUT YOUR ARTICLE

Now that you have created an article and entered briefing instructions, the article is ready to be briefed to your selected author. This is the author who you entered on the **`Brief > Details`** tab.

Figure 50: Email address of author to be briefed

1. Go to the **`Brief`** tab.
2. Click on **`Details`**.
3. Click on <*Email brief*>.
4. A confirmation message displays.

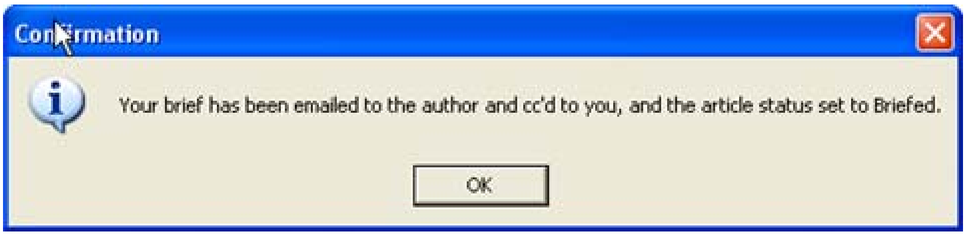


Figure 51: Confirmation message of briefing

5. Click on <*OK*>.

Below is an example of an email brief received by an author and sent through edDesk.

Dear Frances,

This brief is for the Resources section of the 01/08/2006 issue of itechne Documentation Project edDesk .

Subject of article: article to be linked from Brer Rabbit article
Number of words required: 750

Deadline for submission: 18/07/2006
(Please contact us immediately if there are any problems meeting the deadline)

Your brief instructions are as follows:

Please include links to overseas data about Acme corporation.

Illustration requirements are as follows:

The maximum dimensions of any image is to be 300px wide and 400px high

---

This is a test brief standard message. Please submit to cpa_inbasket@itechne.com.

Rights included: First use rights

Terms and conditions

Figure 52: Example of emailed brief

6.6 A QUICK LOOK AT WORKFLOW

Workflow defines a set of statuses that an article must go through before it is published. edDesk has separate workflow statuses for copy, printing and web publishing. Workflow indicates which status the article is up to in the publishing process.

When you emailed your brief to the author you received a confirmation message part of which said that the status of your article had been changed to **Briefed**. The changed status may be seen in the **`Workflow`** tab of the article.

Many of edDesk's view list articles according to their statuses. For example, the view Story Ideas lists articles with a status of Concept, the view Ready for production lists articles with a status of Submitted.

ⓘ see Chapter 13: Workflows for instructions on entering workflow information.

7. Entering copy into edDesk

edDesk is used to edit all copy. This means that you don't have to save your copy in other programs and email it around. edDesk keeps your articles up-to-date with all changes that have been made. There is no risk of accidentally editing or reviewing an old version of an article.

Every member of a team can see where articles are up to in the production process, and which person in that team is currently working on an article.

Note to Authors

Many of you will find that articles have been created by an editor and sent to you when briefed out. You will be adding your copy to the created article.

If a brief is sent by email, without having an article created in edDesk first, you will need to create that article in edDesk, and add your copy to it. See Chapter 6: Creating an article that is ready for briefing out for information on creating articles.

7.1 Objectives

By the end of this chapter you should be able to:

- select an article for editing
- check out an article
- add text to an article
- paste text from other applications into an article
- save an article
- release a checked out article after you have made your changes
- use edDesk's workflow to submit an article for editing.

7.2 Selecting an article to be edited

See the following sections for information on locating articles:

- ⓘ Chapter 4: Views – using views to find articles matching criteria.
- ⓘ Chapter 1: Searching for articles – using edDesk's search form to find articles.

1. Use the Views or Search to display your article description on your screen.
2. Double-click on the article.
3. Your article opens in **Preview mode**. You cannot make any changes.

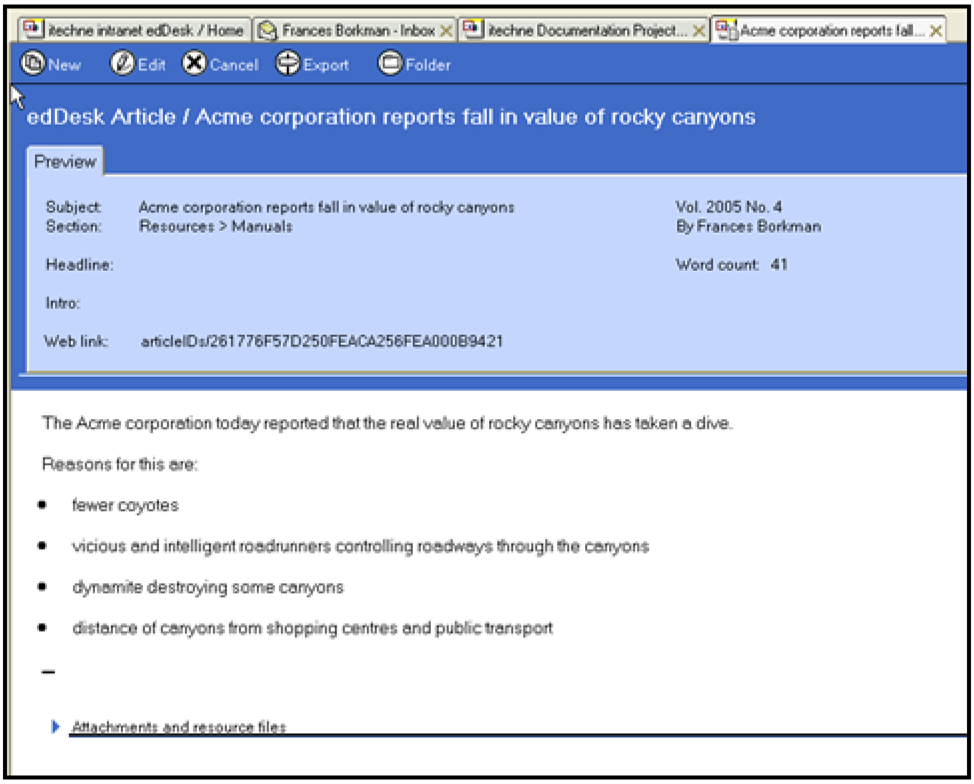


Figure 53: article in Preview mode

4. Click on <*Edit*>.

> **Shortcut key**
>
> You can press <*Ctrl*> + *e* to go into Edit mode instead of clicking on <Edit>. You can also press <*Ctrl*> + *e* from a View when your article is selected and go straight into Edit mode.

5. Your article is now in **Edit mode**.

7.3 IS MY ARTICLE IN PREVIEW OR EDIT MODE?

The easiest way to check which mode your article is in is by looking at the article toolbar.

Preview mode:

Characteristics:

- Only five buttons on the toolbar
- Only one tab – **`Preview`**
- Subject and other article information as display only – not in editable fields
- Web link displayed (more on this later)

Figure 54: Preview mode - article toolbar and information

Edit mode

Characteristics

- More buttons in the toolbar (than Preview mode)
- Several article tabs
- Article information in editable fields (in white rectangles)
- No web link displayed

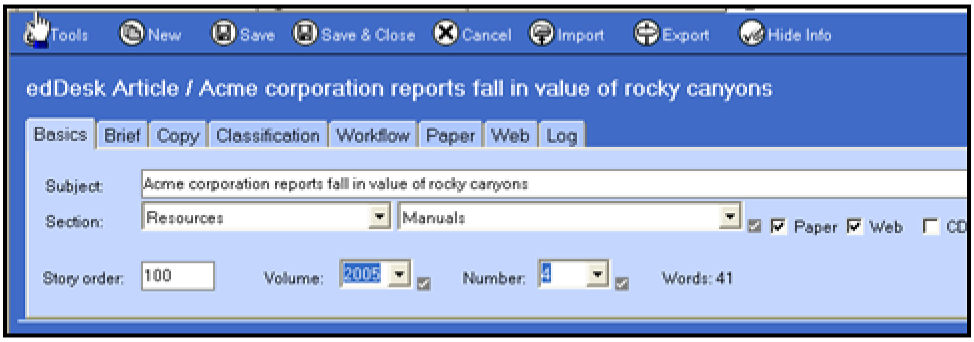


Figure 55: Edit mode - article toolbar and information

7.4 CHECKING OUT AN ARTICLE

Checking out an article means that only you can save changes, although other people can read your article. edDesk automatically makes an article unavailable for others to change whenever you are editing it.

However if you are working on an article but will be away from edDesk for some time (eg. attending a meeting, lunch) it is a good idea to manually check out the article before you leave your desk.

1. Make sure your article is in **Edit** mode.
2. Click on <*Tools*>.
3. Select *Checkout*.
4. Click on <*Save*> or <*Save & Close*> to save the checkout.

Checked out articles have a padlock next to their description when they are listed in views.

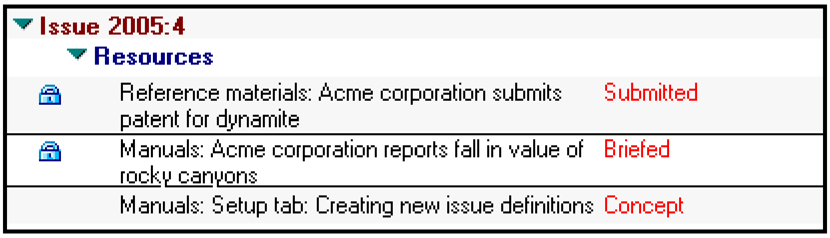


Figure 56: Checked out articles with padlock icon

7.5 Releasing a checked out article

When you check out an article, it remains checked out to you until you release it. After you have made all your changes to an article you **must release** it so that other people can make further changes if they need to.

1. Make sure your article is in **Edit** mode.
2. Click on <*Tools*>.
3. Select *Release*.
4. Click on <*Save*> or <*Save & Close*> to save the release.

7.6 Pasting text from other applications into an article

edDesk allows you to copy and paste text from other applications into articles.

> **Pasting from documents with complex formatting**
>
> If you are pasting from a document that has complex formatting some of that formatting may be lost.

1. Open the edDesk article you want to paste the text into.
2. Go into **Edit** mode.
3. Put your cursor in the article text field.
4. Open the source document (the one from which you want to paste the text).
5. Highlight the text to copy.
6. Use the program's Copy feature (usually <*Ctrl*>+*c*).
7. Go back to the edDesk article.
8. Select the **Edit** menu.
9. Select *Paste…*
10. Your text is pasted into the edDesk article.
11. Check the formatting of the text, and make any basic formatting changes required.

    ⓘ see Chapter 8: Formatting text for more information.

7.7 PASTING FROM COMPLEX DOCUMENTS – USING "PASTE SPECIAL…"

Paste special is used when your source document contains complex formatting that you want to keep.

1. Open the edDesk article you want to paste the text into.
2. Go into **Edit** mode.
3. Put your cursor in the article text field.
4. Open the source document.
5. Highlight the text to copy.
6. Use the program's Copy feature (usually *<Ctrl>+c*).
7. Go back to the edDesk article.
8. Select the **Edit** menu.
9. Select *Paste special…*
10. A dialogue box similar to the one below is displayed.

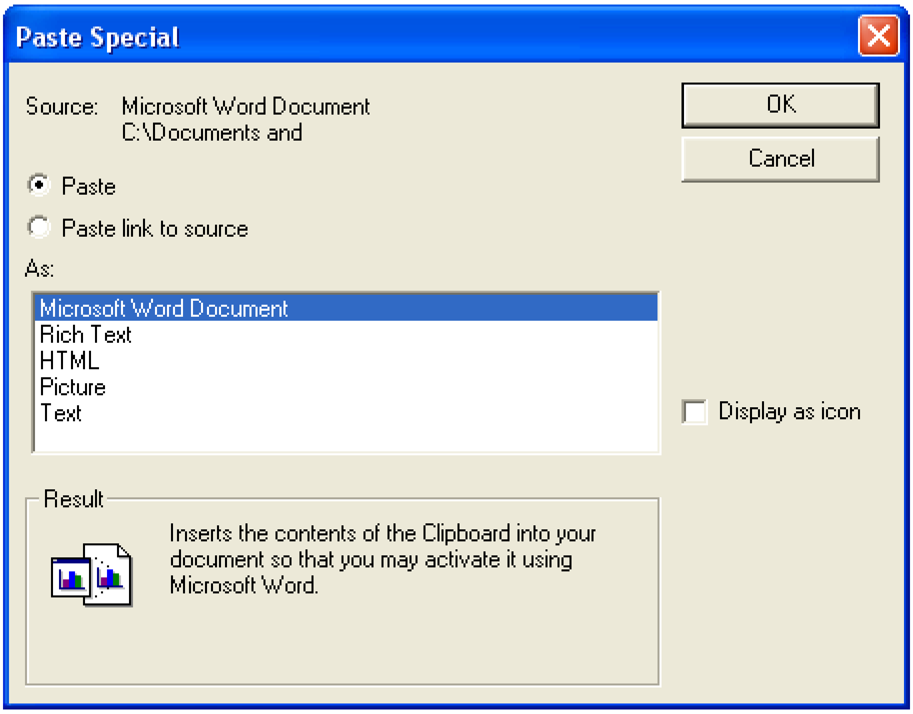


Figure 57: Paste special dialogue box when pasting from a MS Word source document

11. Look at the Result field. This is where you see a description of what will be pasted into your article.
12. Click on the required format to be pasted.

Recommendation

For source text that uses outline numbering (also known as automatic paragraph numbering) and cross references, paste as Rich Text Format. Rich Text displays more of your complex formatting.

13. Click on *<OK>*.

14. Your text is pasted into the edDesk article.

i Paste special formats

Microsoft Word Document

Note

This option is only available if your source document is in MS Word format.

You will be able to edit the pasted text, however much of your formatting is lost.

- **Outline numbering (automatic paragraph numbering)**

  If you have used outline numbering in your source document and then selected some of the numbered paragraphs (not including the first numbered paragraph) to be copied, the numbering will be different in edDesk to your source document.

- **Cross references**

  If you have used "automatic" cross references (that is, you have not manually typed them in) they will NOT be put in the edDesk article.

- **Heading styles**

  If you have used heading styles, especially associated with automatic paragraph numbering, your styles will be put into the edDesk article but if you edit the text they will be replaced by edDesk's default heading styles.

Rich Text Format

Most of your complex formatting is kept.

Recommended format

Rich Text Format is the recommended format to choose for complex documents.

- **Outline numbering**

  Your numbers will be retained, but they are now text. That is, they are not automatically updated if you need to insert new numbers.

- **Cross references**

  Your references will still display correctly, but they are no longer updated automatically.

- **Heading styles**

  Your styles are replaced by edDesk default styles.

HTML

If you particularly want your text to be converted to HTML, for publishing on the Web you could select this option. However, it is not generally used.

Picture

Your text is pasted in as a picture. You cannot edit text pasted in as a picture. However your text will look exactly the same as in the source document.

Text

Removes your formatting and inserts only the text, with line and paragraph breaks. All other formatting, such as bold, italics, changes of font etc are removed. However it is extremely reliable and unlikely to cause problems when your article is further along the production cycle and has been exported to various layout formats.

ii Editing text pasted in with Paste special…

Pasted as Microsoft Word Document

This option is often selected if your source document is a program such as MS Word. Many complex formatting features are removed.

You will see that in the edDesk article your pasted text is surrounded by a greyed rectangle. This indicates that you cannot directly edit the text in the article. You will have to “activate” the source program to edit your text.

1. Have your edDesk article in **Edit** mode.

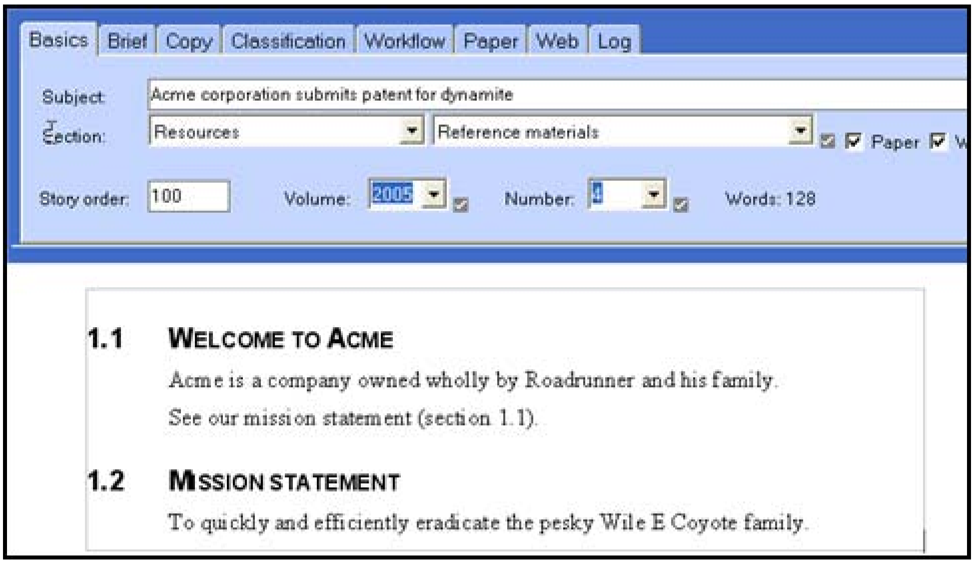


Figure 58: Paste special text area surrounded by grey rectangle. This example uses outline numbering, heading styles and has a cross reference.

2. Double-click in the text surrounded by a rectangle.
3. A version of your source program opens and you can edit the text.
4. Click away from the text area in the rectangle when you have finished editing your text.
5. You will see that some of your original formatting has been removed.

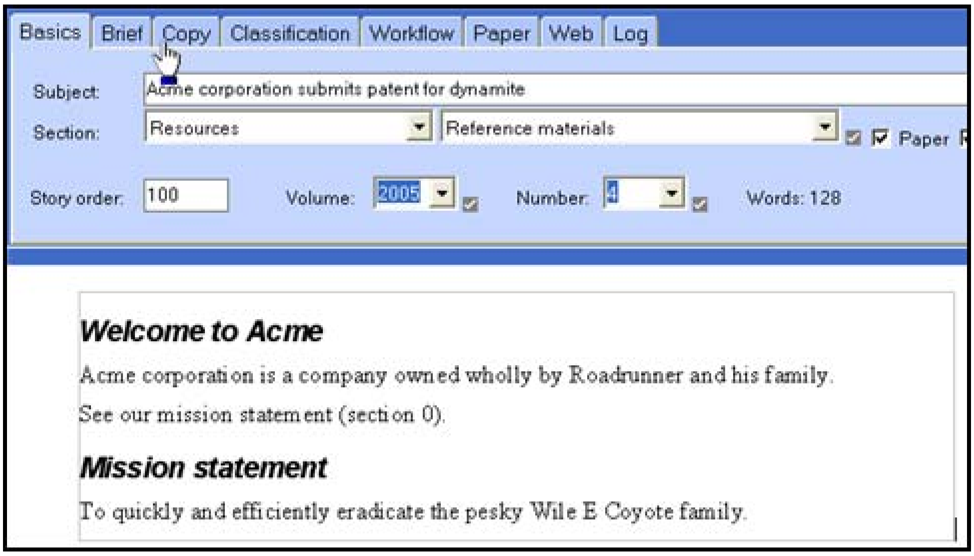


Figure 59: Text from Figure 58 which has been edited, and has now lost some of its complex formatting

Pasted as Rich Text Format

1. Have your edDesk article in **Edit** mode.
2. You will see that your text is just part of the article, no grey rectangle around it.

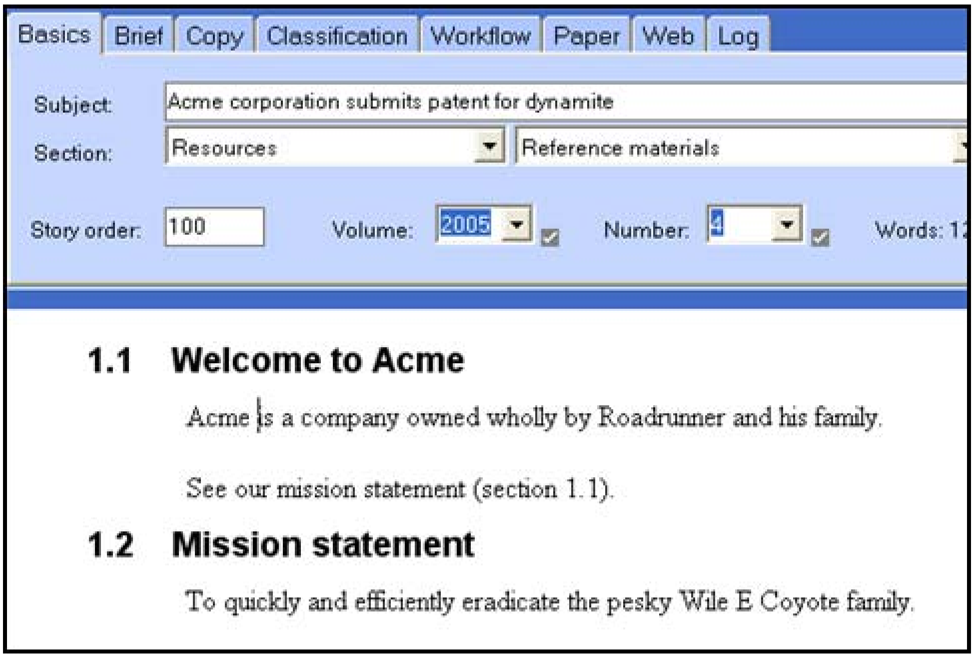


Figure 60: Text paste special... as Rich Text Format. This figure uses the same source document as Figure 58 and Figure 59. Compare the formatting features retained by pasting as Rich Text Format.

3. Click in the text and make your changes.

7.8 Attachments and Resource files

The Attachments and resource files field is used when you have items that are to be displayed programmatically (usually for articles that will be published on the web).

It may also be used if you have a small image on a webpage and want to link to another larger or better quality image. You would attach the required image, then refer to it using the format given:
`articleIDs/[thisdocid]/$file/[filename]`

ⓘ see section 9.9: Image hotspots for more information.

If you want your attachments to appear in the body of an article, you would attach them in the article body at the position you want them to be displayed.

ⓘ see Chapter 9: Including documents and images in articles for more information.

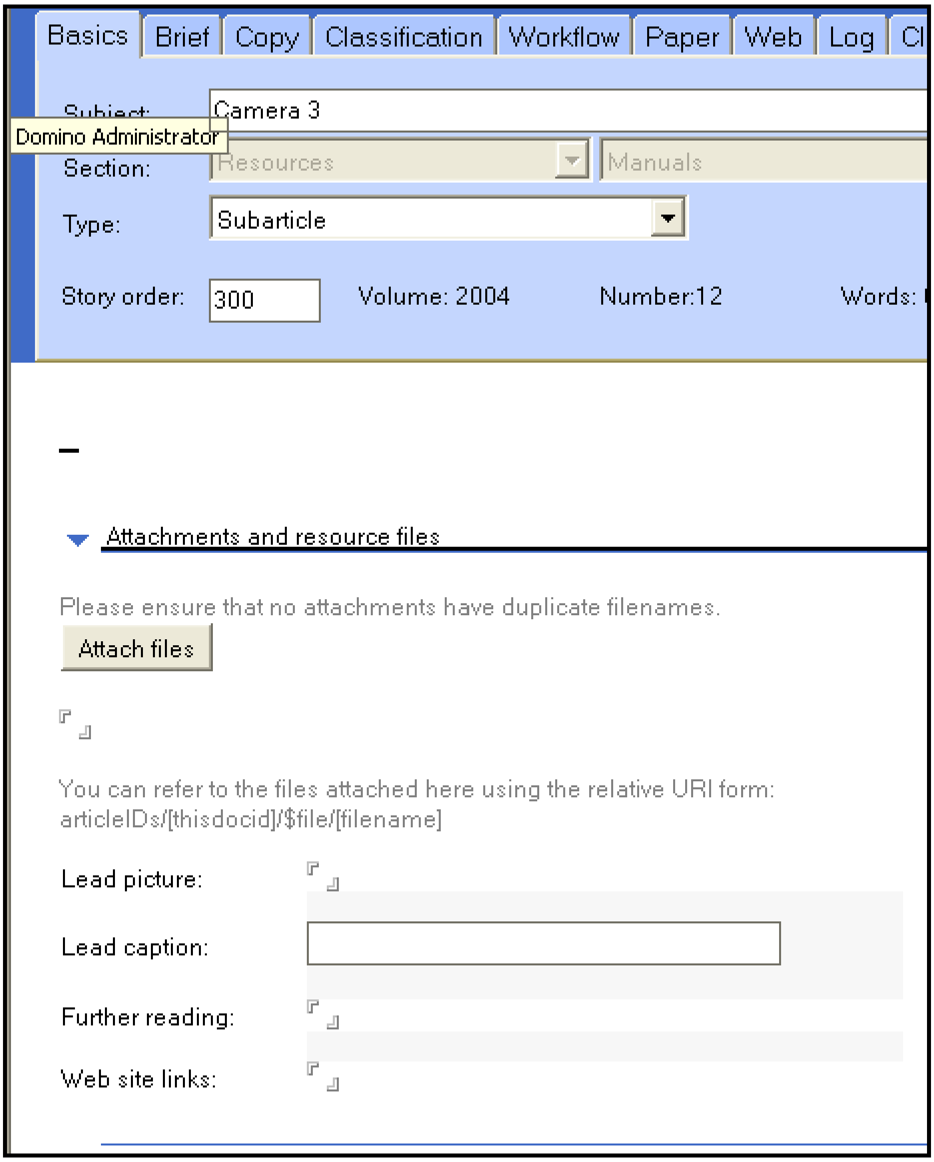


Figure 61: Attachments and resource files field expanded

i Attach files

Filenames

If your filenames contain spaces edDesk automatically replaces those spaces when it refers to the files. For example, a file named *test document.doc* would become *test+document.doc* or *test%20document.doc*.

1. Click on the right arrow next to Attachments and resource files.

2. The Attachments and resources field expands, as in Figure 61.
3. Click on <*Attach files*>.
4. The **Create Attachment(s)** dialogue box displays, listing the directory from which you last attached files.

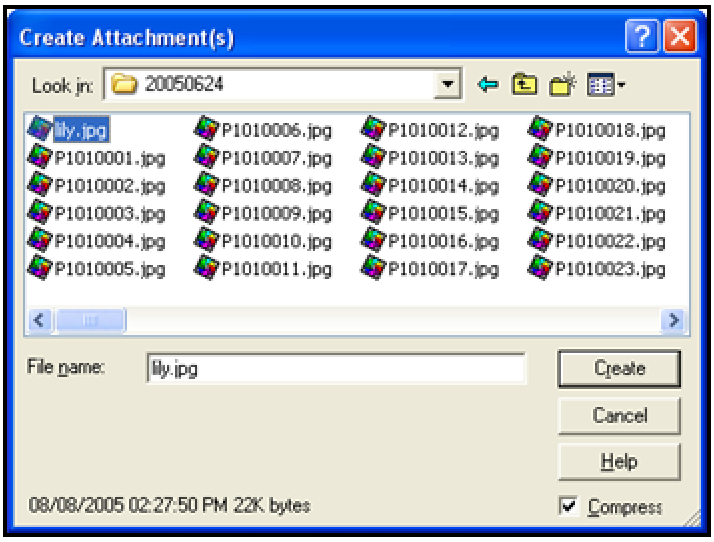


Figure 62: Create attachment(s) dialogue box

5. Navigate to the directory that contains the files you want to attach.
6. Select the file(s) to be attached.
7. Compress: Make sure this field is ticked. That way your file will be made as small as possible (and take up less space on the computer).
8. Click on <*Create*>.
9. Your file is now attached to your article.

ii Lead picture and lead caption

Lead picture and lead caption are used to enter the filename and caption for the main picture in your article.

iii Further reading

Not generally used except by staff of the Bulletin magazine.

iv Website links

This option is no longer used. Hotspot links replaces this option. ⓘ see section 8.9: Creating link (text) hotspots – Linking to other articles and external sites.

7.9 FORMATTING TEXT

Refer to Chapter 8: Formatting text for detailed instructions on formatting the text in articles.

Do not spend much time formatting an edDesk article. edDesk uses “export templates” to ensure that the format of your finished article is correct for its intended publication. If you add much of your own formatting you may end up with an article which does not comply with your publication’s formatting, and you may have to take out some of your own formatting!

8. Formatting text

You should not spend much time formatting an edDesk article. edDesk uses “export templates” to ensure that the format of your finished article is correct for its intended publication. If you add much of your own formatting you may end up with an article which does not comply with your publication’s formatting, and you may have to take out some of your own formatting!

The following items explain how to add the most commonly used (and allowed) formatting to your articles.

There are often several ways of doing the same thing… only the most commonly used are discussed here.

Note about <Ctrl> keys used in combination with other keys to get particular results

If you see an instruction written like “Press *<Ctrl>+b*” then you do the following…

Hold down the <Ctrl> key while you press the letter after the plus sign.

For example, <Ctrl>+b means hold down <Ctrl> while you press b, then let both keys go.

8.1 Objectives

By the end of this chapter you should be able to:

- apply the edDesk standard format to your article
- embolden text
- italicise text
- create numbered lists
- create bulleted lists
- create nested lists
- create hotspot links to other articles and websites

8.2 Article in Edit mode

You must have your article in **Edit** mode before you can format it.

1. Open the article.
2. Click on <*Edit*>.

8.3 Applying the edDesk standard format

The edDesk standard format gives you an article with text well spaced vertically. This makes it much easier to read onscreen as you edit the article. If you have pasted your text from another application, *Standard format* removes extraneous formatting so that the article is correct for publishing to the web.

3. Click on <*Tools*>.
4. Select *Standard format*.

Before applying standard format

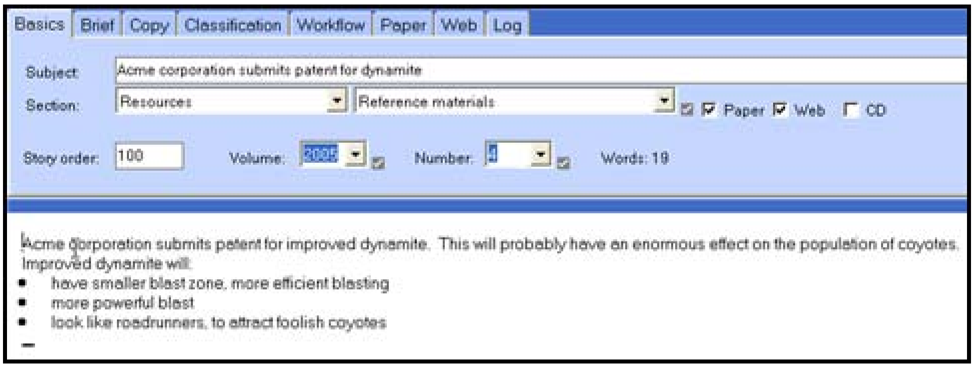


Figure 63: article before applying the standard format

Same article with standard format applied

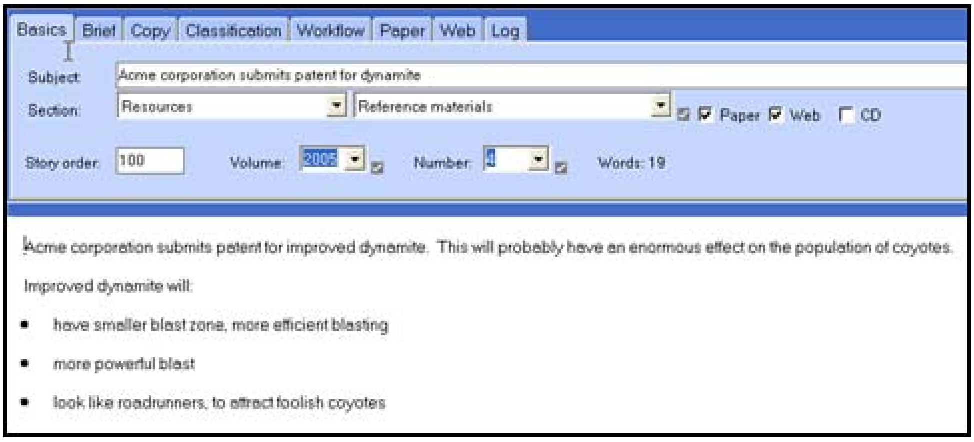


Figure 64: same article with standard formatting applied. This is much easier to read on the screen.

8.4 EMBOLDENED TEXT

This section assumes that you have very little experience in formatting text. If you already use word processing applications, such as MS Word, you will see that the technique is the same in edDesk as in most Windows applications.

Before typing text

1. Press *<Ctrl>+b*.
2. Type the text that is to be bold.
3. Press *<Ctrl>+b* to end the bold.

After text has been typed

1. Highlight the text you want to be bold. (The easiest way is to drag your mouse over the text.)
2. Press *<Ctrl>+b*.

8.5 ITALIC TEXT

This section assumes that you have very little experience in formatting text. If you already use word processing applications, such as MS Word, you will see that the technique is the same in edDesk as in most Windows applications.

Before typing text

1. Press <*Ctrl*>+*i*.
2. Type the text that is to be italics.
3. Press <*Ctrl*>+*i* to end the italics.

After text has been typed

1. Highlight the text you want to be italics. (The easiest way is to drag your mouse over the text.)
2. Press <*Ctrl*>+*i*.

8.6 UNORDERED (BULLETED) LISTS

An unordered list has list items indicated by bullets, not alphanumeric ordering.

There are several types of bullet and they can be applied either before or after the text is entered into the article. Each list item must be separated by a paragraph (by pressing <*Enter*>) for the bullet to appear.

You will use the Lotus Notes toolbar and menus.

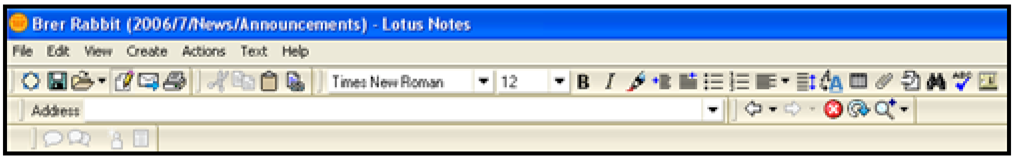


Figure 65:Lotus notes menu and toolbars that display when you are editing an article

Before your text is entered

This is useful if you are typing your copy directly into edDesk.

1. Click on the **Text** menu.
2. Select *List*.
3. Select the type of bullet you want
   - • bullet
   - □ checkmark
   - ○ circle
   - ■ square
4. Type your first list item.
5. Press <*Enter*> to start the next list item. The bullet is automatically created for the next item.
6. Repeat steps 4 and 5 for each item.

7. When you have finished adding list items click on the **Text** menu.
8. Select *List*.
9. Select the ticked bullet type (this is the one that you have been using for your list).
10. Any text typed now will not be in the list.

After your text has been entered (if you are pasting text from another program)

1. Select the text you want to put in a list.
2. Click on the **Text** menu.
3. Select *List*.
4. Select the type of bullet you want:
   - • bullet
   - □ checkmark
   - ○ circle
   - ■ square
5. Your items are now in an unordered list.

8.7 ORDERED (NUMBERED) LISTS

There are several types of ordering you can use for lists. The most common are arabic numerals and alphabetical characters.

Before your text is entered

This is useful if you are typing your copy directly into edDesk.

1. Click on the **Text** menu.
2. Select *List*.
3. Select the type of ordering you want:
   - 1. number
   - A. uppercase alphabetic
   - a. lowercase alphabetic
   - I uppercase roman
   - i lowercase roman
4. Type your first list item.
5. Press <*Enter*> to start the next list item. The number is automatically created for the next item.
6. Repeat steps 4 and 5 for each item.
7. When you have finished adding list items click on the **Text** menu.
8. Select *List*.

9. Select the ticked order type (this is the one that you have been using for your list).
10. Any text typed now will not be in the list.

After your text has been entered (if you are pasting text from another program)

1. Select the text you want to put in a list.
2. Click on the **Text** menu.
3. Select *List*.
4. Select the type of ordering you want:
   - 1. number
   - A. uppercase alphabetic
   - a. lowercase alphabetic
   - I uppercase roman
   - i lowercase roman
5. Your items are now in an ordered list.

8.8 NESTED LISTS

Nested lists are lists within lists. The following is an example of a nested list within the first list item.

Improved dynamite will:

- have smaller blast zone, more efficient blasting
  - o less interruption to environment
  - o less likelihood of blaster being killed
- have a more powerful blast
- look like roadrunners, to attract foolish coyotes

---

1. Create your list and enter the items you want in your lists.

   ⓘ see section 8.7: Ordered (numbered) lists for instructions on creating lists.
2. Highlight the items to be in a nested list.
3. Do one of the following:
   - a. Press <*F8*>. This is Lotus Notes **Indent** key; OR
   - b. Click on the **Text** menu then select *Indent;* OR
   - c. Click on the Indent icon  in the Lotus Notes toolbar.
4. Your highlighted text is now in a nested list.

i “Unnesting” lists

Sometimes you may need to make a previously nested list part of the main list and remove the nesting.

1. Highlight the nested list items that you want to “unnest”.
2. Do one of the following:
   a. Press *<Shift>+<F8>*. This is Lotus Notes **Outdent** key; OR
   b. Click on the **Text** menu then select *Outdent;* OR
   c. Click on the Outdent icon  in the Lotus Notes toolbar.
3. Your list is now unnested.

8.9 CREATING LINK (TEXT) HOTSPOTS – LINKING TO OTHER ARTICLES AND EXTERNAL SITES

If your article is going to be posted on the web (Internet, Extranet or Intranet) you may need to create links to relevant sites and articles from within your article. People can then choose whether to follow those links or not.

These links are called hotspots. There are two types of hotspot:

- Text – discussed in this section
- Image - ⓘ see section 9.9: Image hotspots for more information.

Example 1: you are reviewing several newspapers and want to put a link to those newspapers in your article.

Example 2: You are preparing a report for publishing on the web. You want to put in links to other parts of the report wherever it refers to those other sections or pages.

1. Type the text from which you want to create a link.
2. Highlight the text.
3. Go to the **Create** menu.
4. Select *Hotspot*.
5. Select *Link Hotspot*.
6. The **HotSpot Resource Link** dialogue box appears.

Figure 66: Create Hotspot dialogue box

i To link to another article in your database

1. Type: this should be URL.
2. Value:
   a. Locate the article to which you want to link.
   b. Open the article. Stay in **Preview** mode.
   c. Select and copy the contents of the Web Link field.
   d. Paste the Web Links contents into the Value field.
3. Frame: There are a few ways of displaying a link that is followed. This is determined by what you enter in the Frame field. Only the two most common ways are mentioned here.
   - **_new:** your link opens in a brand new browser window. Your page is left open in the old window.
   - **If you leave this field blank**: when a person follows the link the link contents replace your article.
4. Display: if you want a border around your link check this box.

   > **Default display of link text**
   >
   > Your link is automatically emphasised by appearing in a different colour to the rest of your text. When you are viewing an article the hotspot text is blue.

5. Close the **HotSpot Resource Link** dialogue box.

ii To link to another website

1. Type: this should be URL.
2. Value:
   a. Locate the website to which you want to link.
   b. Select and copy the address field.
   c. Paste the address contents into the Value field.
3. Frame: There are a few ways of displaying a link that is followed. This is determined by what you enter in the Frame field. Only the two most common ways are mentioned here.
   - **_new:** your link opens in a brand new browser window. Your page is left open in the old window.
   - **If you leave this field blank**: when a person follows the link the link contents replace your article.
4. Display: if you want a border around your link check this box.
5. Close the **HotSpot Resource Link** dialogue box.

iii Reviewing your hotspot properties

1. Open the required article.
2. Click on <*Edit*>.
3. Move your mouse over the hotspot you want to review.
4. Right click your mouse. A popup menu displays.
5. Select *Hotspot properties…*
6. The **HotSpot Resource Link** dialogue box displays with the properties of the selected hotspot.

iv Removing a hotspot

Sometimes you might want to delete a hotspot but retain the text that used to be the link.

For example you have created an article discussing cameras, with hotspot links to various cameras. You now need to update the article as one camera is now superseded. You might want to keep the camera name in your article but remove any link to it.

1. Open the required article.
2. Click on <*Edit*>.
3. Move your mouse over the hotspot you want to remove.
4. Right click your mouse. A popup menu displays.
5. Select *Remove Hotspot*. (It is the last item on the menu.)
6. Your hotspot is removed, however the text is still blue. If you want the text to become the same colour as the rest of your article text then do the following:
   a. Select the text.
   b. Right click on the text. A popup menu displays.
   c. Select *Text Properties…*
   d. The **Text Properties** dialogue box displays.
   e. Click on the down arrow in the Colour field.
   f. Select the required colour for your text.
   g. Close the **Text Properties** dialogue box.

9. Including documents and images in articles

You will probably want to include images, PDFs, wordprocessing documents, spreadsheets and other filetypes in some of your articles. You can attach and import files in many formats, and even attach files that are for recordkeeping purposes, and are not to be published with the article.

9.1 OBJECTIVES

By the end of this chapter you should be able to:

- attach files that you want to be published with your article
- attach files that you do NOT want to be published with your article but that you want to retain as a record of the original copy
- attach images to your article
- import an image into your article
- place an image in a required position in your article
- align your images in your article.

9.2 WHAT IS THE DIFFERENCE BETWEEN ATTACHED AND IMPORTED FILES?

Attach	Import
Keeps your attached files separate to the article. You have an icon and filename that ndicate that a file has been attached, but you cannot see the contents of the file when you are editing the article.	Incorporates your files into the article. You can see the contents of your files as you edit your article.
Can attach files in any format.	Limited range of filetypes can be imported. Cannot import PNG filetypes (a fairly common graphics format).

9.3 ATTACHING FILES

Attached files are published with your article. You can attach files in any format, but the most common are wordprocessing, images, PDFs and spreadsheet files.

There are a couple of ways to attach files to your article:

- Using the **File** > **Attach** menus
- Using the **Import** menu from the article toolbar.

i File > Attach menu

File > **Attach** lets you attach a file of any filetype to your article.

1. Open the article to which you want to attach files.
2. Go into **Edit** mode and put the cursor wherever you want the attachment to be placed.
3. Click on the **File** menu.
4. Select *Attach…*
5. The **Create Attachment(s)** dialogue box opens, listing files in the directory from which you last attached files.
6. Navigate to the required directory (the one your attachments are currently in).
7. Select the files to attach.

> **Selecting several files to attach**
>
> If the files are listed in a group (no other files between them) click on the first file then hold down <Shift> while you click on the last file to be attached.
>
> If the files are listed separately (with other files between them) click on the first file, then hold down <Ctrl> while you click on each file to be attached.

8. Click on *<Create>*. Your files are attached to your article.

ii Import menu

> **Note**
>
> Despite of being called **Import**, this menu gives options to both import and attach files.

1. Open the article to which you want to attach files.
2. Go into **Edit** mode and put the cursor wherever you want the attachment to be placed.
3. Click on the **Import** menu.
4. A list of options displays. Choose the option that allows you to import the required file.
    - *Import article from file* – this adds the text (and some formatting) from your source file to your article. The file becomes incorporated into your article rather than just being attached separately.
    - *Attach original WP file* – attaches the original wordprocessing file to your article. This file is listed in the **Log** tab and does not appear in the article's content. The file is attached with all formatting (and is not incorporated into your article text).
    - *Paste text from clipboard* – uses Paste Special to insert any text on your clipboard into your article. Your inserted text is incorporated into the article and some formatting from the source will be

removed. ⓘ see section 7.7: Pasting from complex documents – using "Paste special…"

- *Attach pics* – attaches images that you want to be used by the print production team only. Images imported here are listed in the **`Paper`** tab. They are not published on the web version of your article.

5. If you selected the *Import article from file*, the **Import** dialogue box opens. If you selected to *Attach original WP file*, or *Attach pics*, the **Create Attachment(s)** dialogue box opens. Both dialogue boxes list files in the directory from which you last attached or imported files.
6. Navigate to the required directory (the one your attachments are currently in).
7. Select the files to attach or import.

> **Selecting several files to attach**
>
> If the files are listed in a group (no other files between them) click on the first file then hold down <Shift> while you click on the last file to be attached.
>
> If the files are listed separately (with other files between them) click on the first file, then hold down <Ctrl> while you click on each fie to be attached.

8. Click on <*Create*>.

9.4 ATTACHING WP FILES THAT YOU DO NOT WANT TO PUBLISH WITH YOUR ARTICLE

If you want to keep a copy of the original wordprocessing document for a story and do not want that copy published use the **Import** menu.

1. Open the article and go into **Edit** mode.
2. Go to the **Import** menu.
3. Select *Attach original WP files*.
4. The **Create Attachment(s)** dialogue box opens, listing files in your default directory.

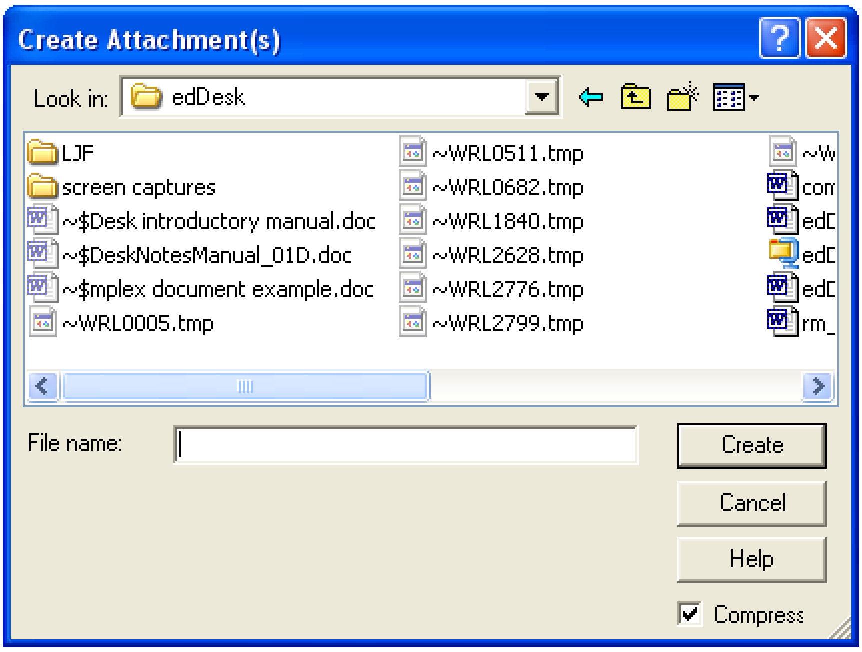


Figure 67: List of files to attach to an article

5. Navigate to the directory that contains the file(s) you want to attach to your article.
6. Click on the filename of the file to attach.

> **Selecting several files to attach**
>
> If the files are listed in a group (no other files between them) click on the first file then hold down <Shift> while you click on the last file to be attached.
>
> If the files are listed separately (with other files between them) click on the first file, then hold down <Ctrl> while you click on each fie to be attached.

7. Make sure the Compress box is ticked (that way your attached file will be as small as possible).
8. Click on *<Create>*.
9. Your selected files are attached to the article.

i To see WP files that have been attached to your article

WP files that are not to be published with your article are not visible when you are editing the article. To see a list of those attached files do the following:

1. Open your article and go into **Edit** mode.
2. Click on the **Log** tab.

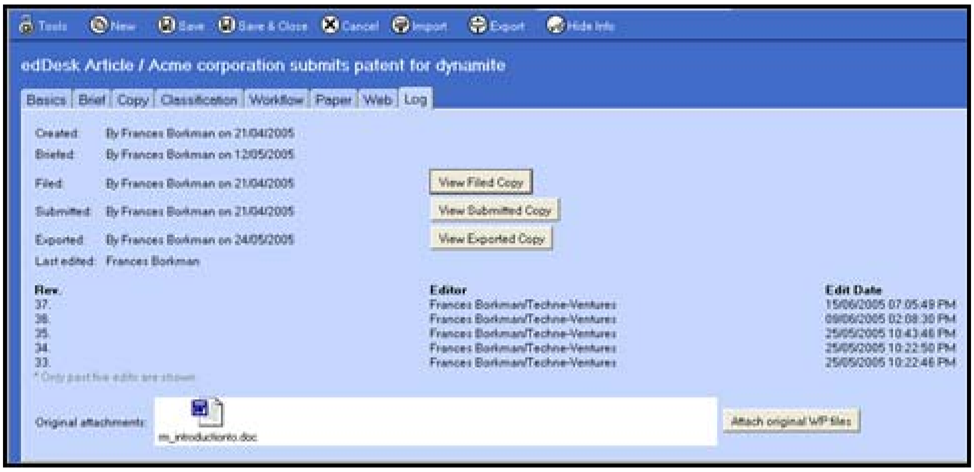


Figure 68:Log tab with one attached WP file

3. Your attached WP files are listed in the Original attachments field.

9.5 Image Preparation

Images must be prepared in the requested format, pixel size and quality in an image editing program before you add them to your edDesk articles. Your editor should specify the image qualities of any image to be used in an article and include these in the brief.

9.6 Attaching images that are to be used in printed publishing only

Sometimes you may want to publish your article on the web and on paper. If you have images that are **only** to be used in the printed version of the article you can store them separately to the images that are to be used in the web version. This makes them easy to manage.

You can also enter specific illustration instructions for those print images.

1. Open the article and go into **Edit** mode.
2. Go to the **Import** menu.
3. Select *Attach Pics*.
4. The **Create Attachment(s)** dialogue box opens, listing files in the directory from which you last attached files.

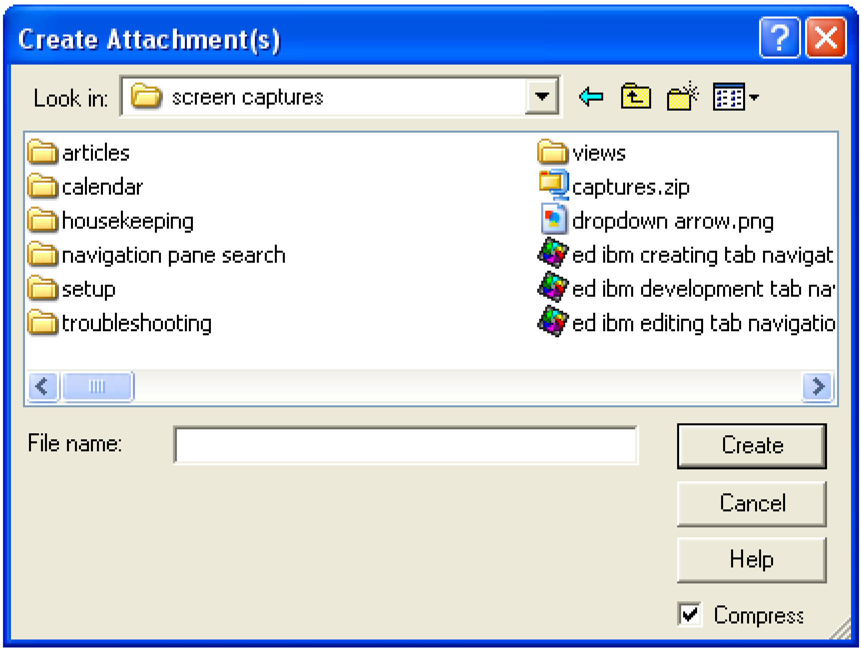


Figure 69: Create Attachments(s) dialogue box listing directory from which files were last attached

5. Navigate to the directory that contains the file(s) you want to attach to your article.
6. Click on the filename of the file to attach.

Selecting several files to attach
If the files are listed in a group (no other files between them) click on the first file then hold down <Shift> while you click on the last file to be attached.
If the files are listed separately (with other files between them) click on the first file, then hold down <Ctrl> while you click on each fie to be attached.

7. Make sure the Compress box is ticked (that way your attached file will be as small as possible).
8. Click on <*Create*>.
9. Your images are now attached to your article.

i To list images that have been attached to your article

Images that are only to be published on paper are not visible when you are editing the article. To see a list of those attached images do the following:

1. Open your article and go into **Edit** mode.
2. Click on the **`Paper`** tab.

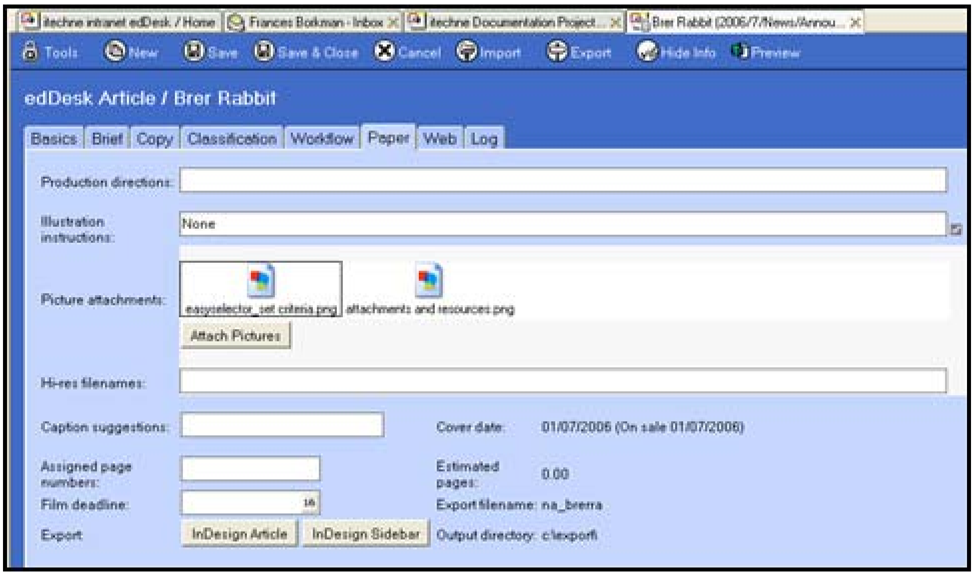


Figure 70: Paper tab listing attached images in the Picture attachments field

3. `Picture attachments`: Your attached images are listed in this field.

To view an attached image

1. Double-click on the image icon.
2. The **Attachments** dialogue box opens.
3. Click on <*View*>. Your image is opened in a new window tab.

9.7 IMPORTING AN IMAGE INTO AN ARTICLE

Importing images incorporates the image into your article – that is, it becomes part of your article, rather than just being attached to it. Importing gives you control over the image size on the page, physical position of the image, and properties such as borders, text wrapping and captions.

1. Prepare your image in your image editing program.
2. Open your article and go into **Edit** mode.
3. Position your cursor where you want the image to appear.
4. Go to the **File** menu.
5. Select *Import*.
6. The **Import** dialogue box displays showing you the directory you last used to import files from.

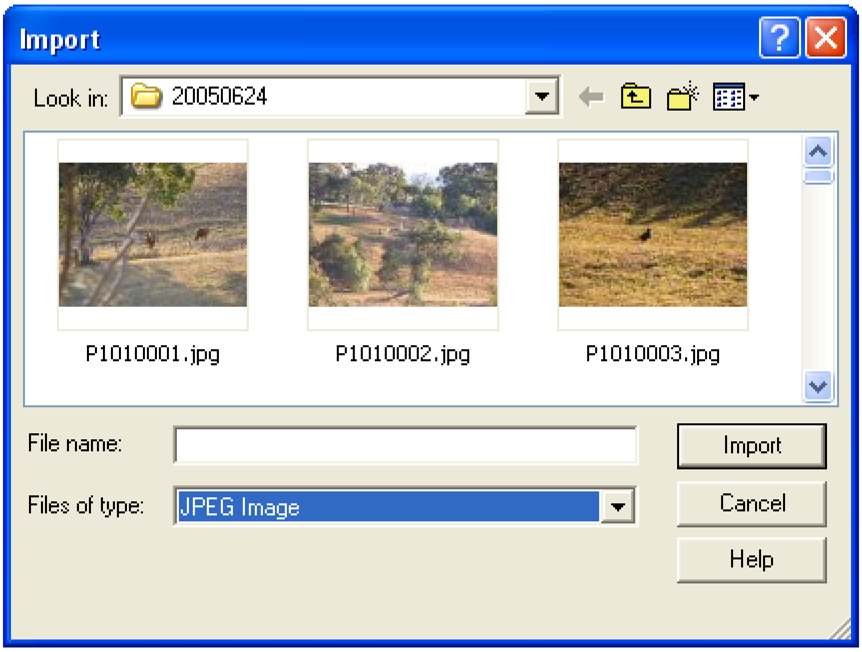


Figure 71: Import image dialogue box with image type of JPEG selected

7. Files of type: select the image type for the image you want to import.
8. Click <*Import*>.
9. The image is placed at the current cursor location in its original format and is rendered inline.

9.8 IMAGE PROPERTIES

When you have placed your image in your article you can set various properties to control the display of your image.

1. Click once on your image.
2. Select the **Picture** menu (from the Lotus Notes menus at the top of your screen).
3. Select *Picture Properties…*.

4. The **Picture** properties dialogue box displays.

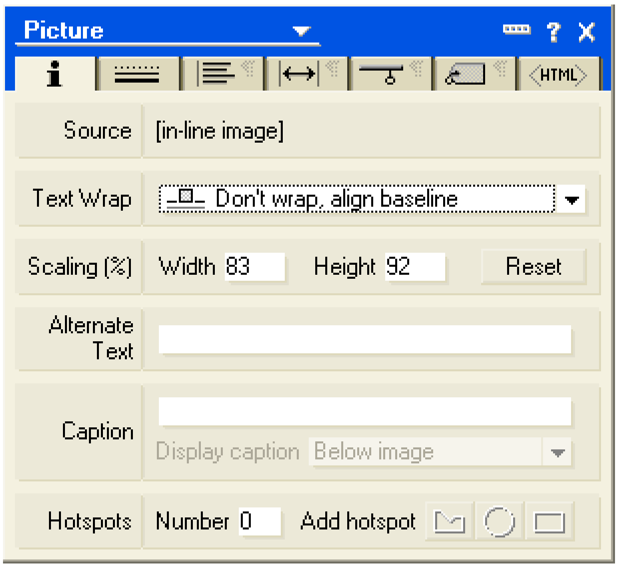


Figure 72: Picture properties dialogue box

5. Text Wrap: Select the down arrow next to this field. You see a list of choices, each with a diagram displaying the effect your choice will have on your image and its relation to the text in the next paragraph. Select the desired wrap.

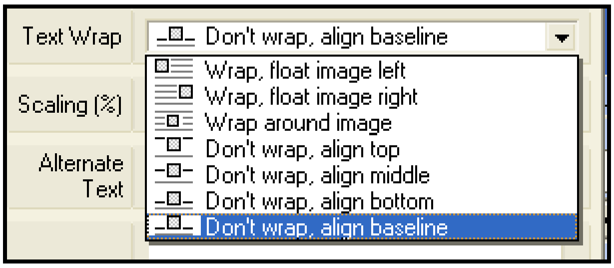


Figure 73: Text wrap options, showing layout of each option

> **Note**
>
> Images rendered inline are treated as part of a paragraph. Any wrapping will be within that paragraph only.
>
> If your paragraph is short and the image large you will still see blank spaces next to the image.

6. Scaling (%): When you first import an image this will be **Width 100 Height 100**. If you have resized your image you will see different percentages.

   Click on <*Reset*> to put the scaled image back to its original size.

7. Alternate Text: This is the text that appears when a person hovers their mouse over an image on the web. It is important to enter alternate text if your article is to be published on the web because visually impaired people and people who have images turned off on their browser rely on alternate text to "see" the image.

8. Caption: If you want a caption for your image, enter the caption in this field. Click on the tick icon to confirm your caption.

9. Display caption: Select where you want the caption to display. The option "Centred on image" does mean that your caption appears in the centre of your image (not centred underneath your image!).

9.9 IMAGE HOTSPOTS

Hotspots may be used when your article is published on the web. Hotspots are areas that people can click on in an image. When they click they are taken to another webpage.

Hotspots are often used in maps. For example, you have a web page with a map of Australia. If a person clicks on New South Wales they are taken to more details for New South Wales.

1. Click on the image.
2. Select the **Picture** menu. You will see a list of Hotspot shapes.
3. Select *Add Hotspot (shape)*.

   Choose a shape that fits with the area you want to make a hotspot. If you want to select an irregular area then select *Add Hotspot Polygon*.
4. Position your cursor where you want your hotspot to be then drag your mouse to make the hotspot the required size.
5. The **Hotspot** properties dialogue box opens.

i To link to another article in your database

1. Type: this should be URL
2. Value:
   a. Locate the article to which you want to link.
   b. Open the article. Go into **Edit** mode.
   c. Go to the **Web** tab.
   d. Copy the contents of the Human URL field.
   e. Paste the Human URL contents into the Value field.
3. Frame: There are a few ways of displaying a link that is followed. This is determined by what you enter in the Frame field. Only the two most common ways are mentioned here.
   - **_new:** your link opens in a brand new browser window. Your page is left open in the old window.
   - **If you leave this field blank**: when a person follows the link the link contents will replace your article.

Using Human URLs

Human URLs (also known as human-readable, user-centred, user-friendly, spider-friendly or URL rewriting) not only makes your pages much clearer to site visitors, but goes a long way to help increase your visibility with Web search engines. Using Web addresses that echo keywords and content within the same page will directly benefit your page rankings in search engines like Google and Yahoo!. Not only do search engines "prefer" sites whose URLs have keywords in them, but they can penalize sites that contain such database-created URL characters as question marks.

Human-readable URLs are easier to remember, and importantly to marketers, easier to tell people. If you want to build a campaign around a specific page, you can name that page in a way that reinforces the campaign, and create a unique URL for campaign tracking.

From a visitor point of view, the human-readable URL is indicative of what the page is about. Web-savvy visitors will quickly grasp your naming scheme and use it to explore your site. A surfer who types in a URL that results in a "Page Not Found" message may be able to reach the page by checking for a typing error. Or they may try to "hack" the URL by removing the end segment. This is almost impossible if it is not human-readable.

(source - http://www.brookgroup.com/Resources/Content-Management/Human-Readable-URL.html)

ii To link to another website:

1. Type: this should be URL
1. Value:
   a. Locate the website to which you want to link.
   b. Copy the address field.
   c. Paste the address contents into the Value field.
2. Frame: There are a few ways of displaying a link that is followed. This is determined by what you enter in the Frame field. Only the two most common ways are mentioned here.
   - **_new:** your link opens in a brand new browser window. Your page is left open in the old window.
   - **If you leave this field blank**: when a person follows the link the link contents will replace your article.

5. Close the **Hotspot** properties dialogue box.

iii To link to a larger image from the image on your webpage

1. Add the small image to the article, in the position in which you want it to display on the posted webpage.

2. Click on **Attachments and resource files** (this is at the bottom of your article). This section expands.

Figure 74: Expanded Attachments and resource files section of the article

3. Click on the <*Attach files*> button.

4. The **Create Attachments** dialogue box displays. Locate the image you want to link to.

5. Double-click on the image. It is now added to the article (in the Attachments and resource files section).

6. Click once on the small image.

7. Select *Add Hotspot (shape)*.

8. Choose a shape that fits with the area you want to make a hotspot. If you want to select an irregular area then select *Add Hotspot Polygon*.

9. Position your cursor where you want your hotspot to be then drag your mouse to make the hotspot the required size.

10. The **Hotspot** properties dialogue box opens. There are a couple of fields that you need to complete:

    - Type: leave this as URL
    - Value: This must be in the format
      articleIDs/[thisdocid]/$file/[filename]

      WHERE
      [thisdocid] is the article ID and
      [filename] is the filename of the image.

      > **Important**
      >
      > The square brackets just indicate that variable information goes here - make sure that you don't put them in your value field.

    - Type: enter `_new.` This opens the linked image in a new browser window.

To get the article ID:

1. Go to the **Web** tab.

2. Copy the contents of the Article ID field.

About the images used in this screen capture

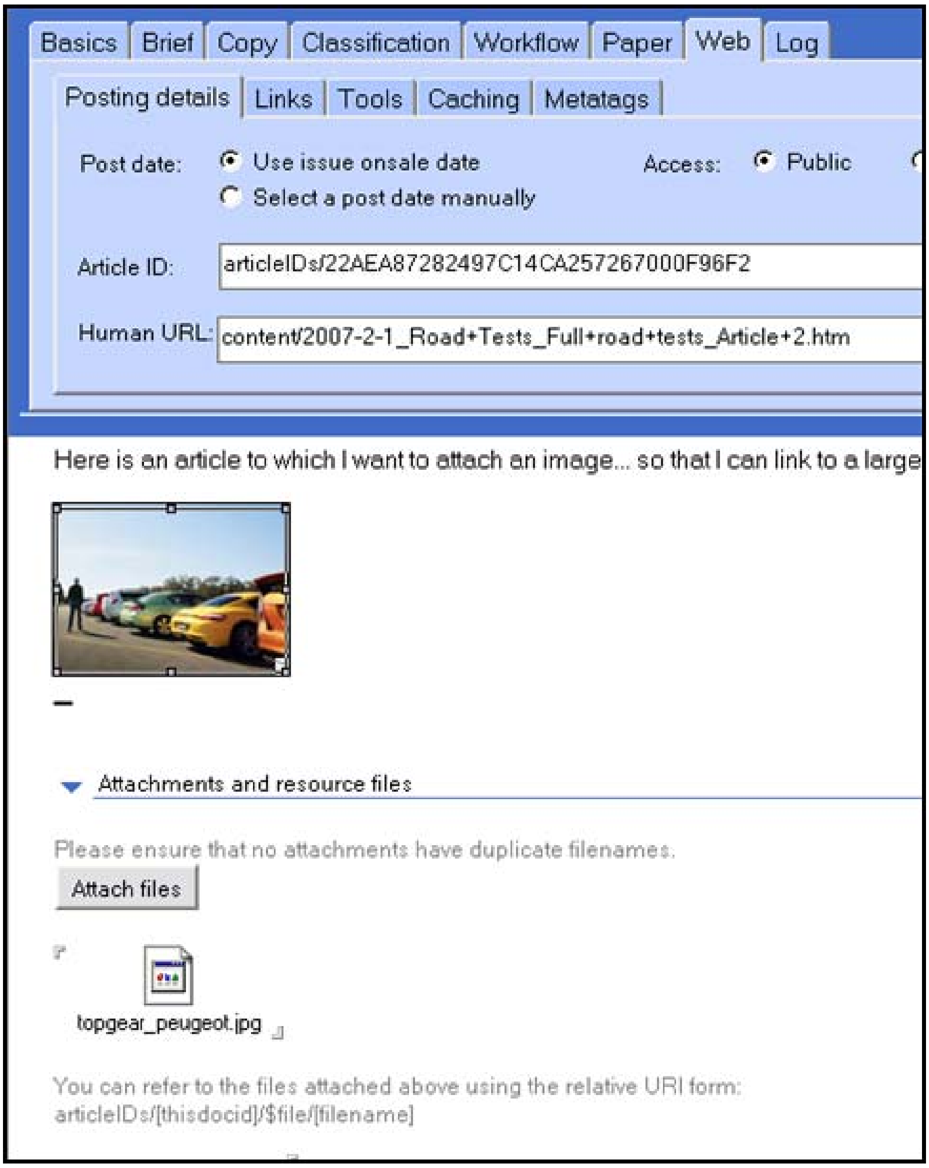


Figure 75: Image in body of article, with Attach files listing image linked to by a hotspot set in the body image.

This article has an image in the body of the article. It also has an attached file `topgear_peugeot.jpg`.

A hotspot was created around the image in the body of the article. The hotspot properties `Value` field contains the following:

> `articleIDs/22AEA87282497C14CA257267000F96F2/$file/`
> `topgear_peugeot.jpg`

WHERE

> `22AEA87282497C14CA257267000F96F2` is the articleID (from the **`Web`** tab) AND
>
> `topgear_peugeot.jpg` is the name of the attached file

10. Article toolbar – Tools, New, Import, Export

This chapter instructs you in using the toolbar items available within articles. This chapter does not include:

- *<Save & Close>*
- *<Cancel>*

Figure 76: Default article toolbar when editing an article

10.1 Objectives

By the end of this chapter you should be able to use the:

- **Tools** menu to assist in preparing your article
- **New** menu to create comments and insert backgrounders into your article
- **Import** menu to attach and import various filetypes to your article
- **Export** menu to export your finished article to other formats ready for printing
- Hide info option
- Preview option

10.2 Tools menu

The **Tools** menu has many useful features that are used in your articles. These are:

- Checkout / Release
- Word count
- Address…
- Spell check
- Print article
- Send brief via Email
- Standard format

i Checkout / Release

ⓘ see section 7.4: Checking out an article and section 7.5: Releasing a checked out article for more information.

ii Word count

Counts the number of words in the article body. This does not include any text entered in the Subject, or other fields above the article body.

iii Address…

This option lets you enter an email address for the author to whom you are briefing the article.

iv Spell check

Checks the spelling of the entire article – that is, text entered in **every** tab.

1. Click on the **Tools** menu.
2. Click on *Spell check*.
3. If there are any words that the spell check does not recognise a dialogue box opens with the first unrecognised word highlighted.

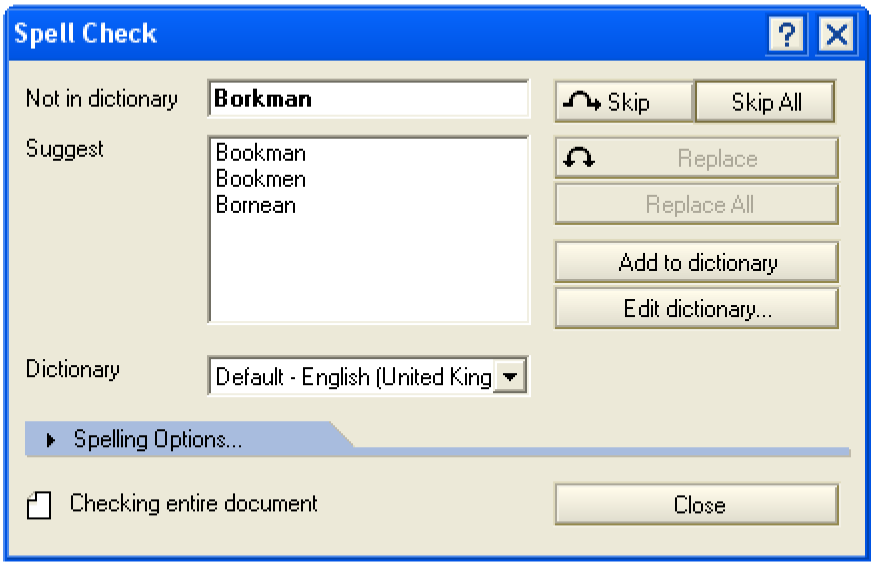


Figure 77: spell check with first unrecognised word in the "Not in dictionary" field

4. If the word is correct as you typed it click on either:
   a. *<Skip>* - to keep just that instance of the word; OR
   b. *<Skip All>* – to keep all instances of the word through the entire document.
5. Not in dictionary: If the word is incorrect, but none of the suggestions are what you want (this may occur when you mistype a name) then type the word correctly in the Not in dictionary field.
6. Suggest: If any of the suggestions are the correct spelling click once on the suggestion and then click on either:
   a. *<Replace>* - to replace just that instance of the word; OR
   b. *<Replace All>* - to replace all instances through the article.
7. *<Add to dictionary>*: This is particularly useful for company names and addresses. Click this button to add a word in the Not in dictionary field to your dictionary. This means that the spell check will now recognise that word.

8. *<Edit dictionary>*: Mostly useful if you have accidentally added an incorrectly spelt word to the dictionary. This is only for words that you have added.

   a. Click on *<Edit dictionary>*.

   b. The **User Spell Dictionary** dialogue box opens, listing all the words you have added to your personal dictionary.

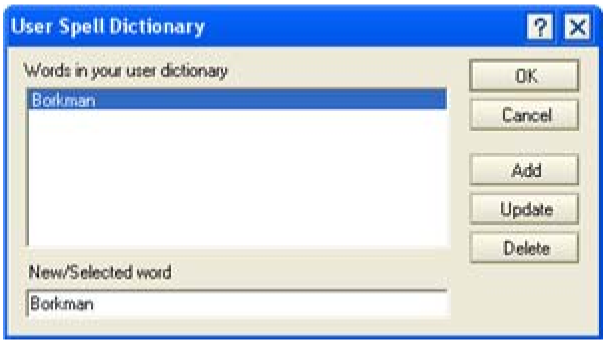


Figure 78: Dialogue box displayed after selecting Edit dictionary...

   c. New/Selected word: This field is where you enter any words you want to add to the dictionary. If you click on a word listed in your dictionary, it will be displayed in this field. Make any changes to the word then select one of the following buttons:

   - *<Add>* - to add to your dictionary
   - *<Update>* - to update the word to whatever is in the New/Selected word field
   - *<Delete>* - delete the word in the New/Selected word field.

   d. When you have made the required changes click on *<OK>*.

9. Dictionary: Displays the selected language. You can select other languages if required (especially useful if your article should be written with American English spelling).

Spelling options

You can select various rules to be obeyed when running the Spell check.

1. Click on Spelling Options.
2. The following menu is displayed.

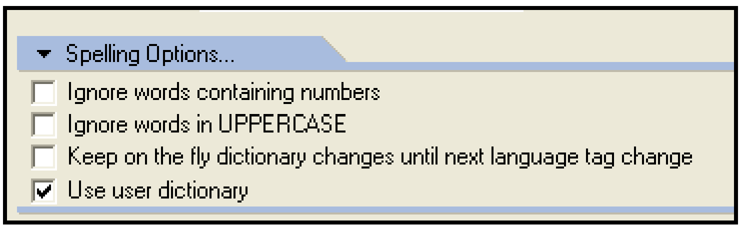


Figure 79: Spelling options menu

3. Click on the options you want to use.

4. Click on Spelling Options to close the options display.

v Print article

Select this option to print your article. The printout will include the following:

- Subject
- Volume and Issue
- Section
- Headline
- Intro
- Web link
- Author
- Word count
- Article text

vi Send brief via Email

This option lets you send the brief for an article to the person entered as the Author in the **Brief** tab. It is used mainly by editors and other people commissioning articles.

All briefing instructions are included in the email.

ⓘ see section 6.3iii: Brief tab for more information.

vii Standard format

This applies edDesk's standard format to your text. This formats your text so that it is easy to read on screen.

ⓘ see section 8.3: Applying the edDesk standard format.

10.3 NEW MENU

The **New** menu is used to:

- create related articles. ⓘ see Chapter 12: Creating hierarchical content – related articles
- enter comments about an article
- enter background information about an article.

i Comments

Comments are often used for internal editorial comment about an article. However, your export template may allow comments to be published on the web as part of the article. You can have several comments for each article. Comments cannot be edited once they are saved.

People visiting your site may also be allowed to comment on your content.

Examples of such websites that have been created using edDesk, are:

- http://www.tomatomagazine.com.au
- http://www.colinclimo.com
- http://www.wheelsmag.com.au

Getting to the Comment screen – from a View

1. Display a view that has a toolbar (views such as Sections and All Issues).
2. Click on the title of the article to which you want to add a comment.
3. Click on the **New** menu.
4. Select *Comment*.
5. The **`Comment`** screen displays in a new window tab called **`(Untitled)`**.

Getting to the Comment screen – from an article

You do not have to be in **Edit** mode to add a comment to an article.

1. Open the article to which you want to add a comment.
2. Click on the **New** menu.
3. Select *Comment*.
4. The **`Comment`** screen displays in a new window tab called **`(Untitled)`**.

Entering your comment

edDesk fills in some fields automatically for you. These are the `Posted` field, which edDesk gets from the current date and the `By` field, which edDesk gets from your login.

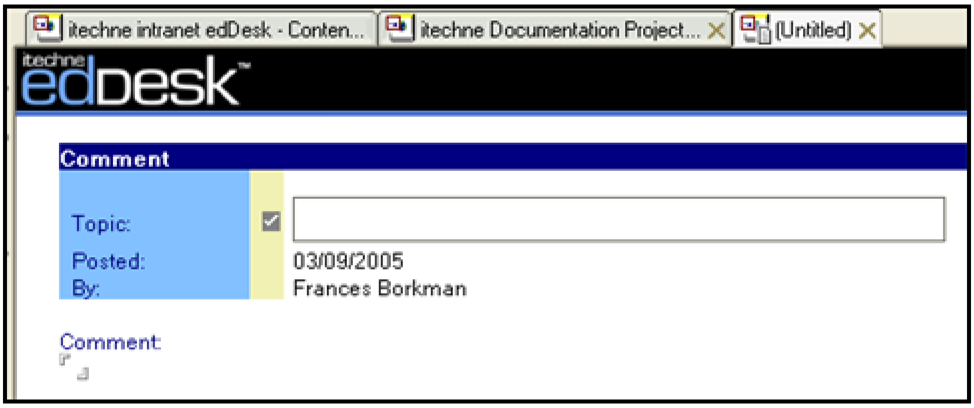


Figure 80: Comment screen when first opened

1. Topic: Type the title of the article for publication.
2. Comment: Type the text of your comment.
3. After you have entered your comment click on the cross in the **(Untitled)** window tab.
4. You see a message: `Do you want to save this new document?`
5. Click on <*Yes*> to save your comment, <*No*> to not save your comment or <*Cancel*> to continue working on your comment.

When you are looking at an expandable view (such as Sections or All Issues) your comment is listed underneath your article title.

Figure 81: Comments listed under article title

ii Backgrounders

Backgrounder is used to enter information that you probably don't want to be published. They may be used for research notes, interview notes to which you refer as you are writing the article.

Your organisation's export templates can be setup to publish your background information if required.

You can have several backgrounders for each article. Backgrounders cannot be edited once they have been saved.

Getting to the Backgrounder screen – from a View

1. Display a view that has a toolbar (views such as Sections and All Issues).
2. Click on the title of the article to which you want to add a backgrounder.
3. Click on the **New** menu.
4. Select *Backgrounder*.
5. The **Backgrounder** page displays in a new window tab called **(Untitled)**.

Getting to the Backgrounder screen – from an article

You do not have to be in **Edit** mode to add a backgrounder to an article.

1. Open the article for which you want to add a backgrounder.
2. Click on the **New** menu.
3. Select *Backgrounder*.
4. The **Backgrounder** page displays in a new window tab called **(Untitled)**.

Entering your backgrounder

edDesk fills in some fields automatically for you. These are the `Posted` field, which edDesk gets from the current date and the `By` field, which edDesk gets from your login.

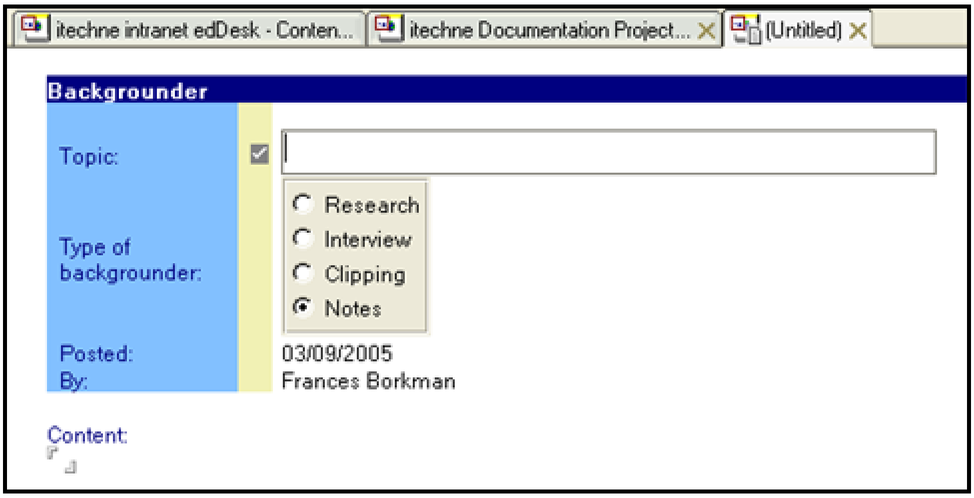


Figure 82: Backgrounder screen as first displayed

1. `Topic`: Type the title of the article for publication.
2. `Type of backgrounder`: Select the type of background information you are entering. You can only select one type.
3. `Content`: Type your backgrounder.
4. After you have entered your backgrounder click on the cross in the **`(Untitled)`** window tab.
5. You see a message: `Do you want to save this new document?`
6. Click on <*Yes*> to save your backgrounder, <*No*> to not save your backgrounder or <*Cancel*> to continue working on your backgrounder.

When you are looking at an expandable view (such as **Sections** or **All Issues**) your backgrounders are listed underneath your article title. The type of backgrounder is listed before the backgrounder topic.

Figure 83: Article with two backgrounders - Clipping and Research. There is also one comment for the article.

10.4 IMPORT MENU

The **Import** menu allows you to import and attach files in various formats to your article. There are several options available.

ⓘ see Chapter 9: Including documents and images in articles for instructions.

i Import article from file

This adds the text (and some formatting) from your source file to your article. The file becomes incorporated into your article rather than just being attached separately.

ⓘ see section 9.3ii: Import menu for more information.

ii Attach original WP file

Attaches the original wordprocessing file to your article. This file is listed in the `Log` tab and does not appear in the article's content. The file is attached with all formatting (and is not incorporated into your article text).

ⓘ see section 9.4: Attaching WP files that you do NOT want to publish with your article for more information.

iii Paste text from clipboard

Uses **Paste Special** to insert any text on your clipboard into your article. Your inserted text is incorporated into the article and some formatting from the source will be removed.

ⓘ see section 7.7: Pasting from complex documents – using "Paste special…"

iv Attach Pics

Attaches images to be used by the print production team only. Images imported here are listed in the **`Paper`** tab. They are not published on the web version of your article.

ⓘ see section 9.6: Attaching images that are to be used in printed publishing only for more information.

10.5 EXPORT MENU

The **Export** menu is used to save your articles in different formats when they are ready to be published. For example, if you are going to publish to paper you may want to export the completed article to Quark XPress format.

1. Open the article that you want to export to another format.
2. Click on the **Export** menu.
3. A list of available export formats displays.
    - InDesignXML
    - Quark XPress
    - Microsoft Word
    - InDesign
    - Text
4. Select the required format you want to export your article to.

> **Note**
>
> You have to have the relevant export application installed to export to most of these formats.

5. The **Export filename** dialogue box displays, with the filename pre-filled. The default name for your exported file is first letter of the section, first letter of the subsection, then first word and first two letters of second word from the article description.

   For example, you have an article in section: Resources Subsection: Training with a Description "Acme corporation". You want to export it as a text file. edDesk would suggest an export filename of "rt_acmeco.txt"

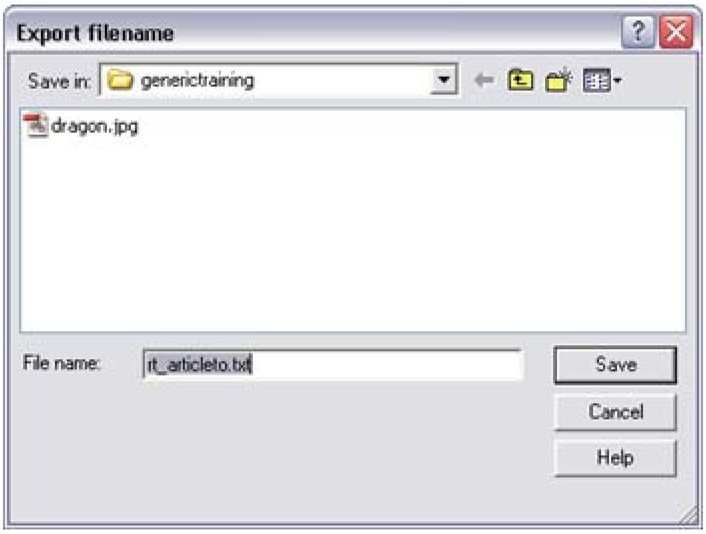


Figure 84: Export filename dialogue box

6. <*Save*> your exported file.

10.6 HIDE INFO

Select this option if you want to display more text of your article, but do not want to see the information about the article at the top of your screen.

1. Open the article and go into **Edit** mode. The article information shows as below.

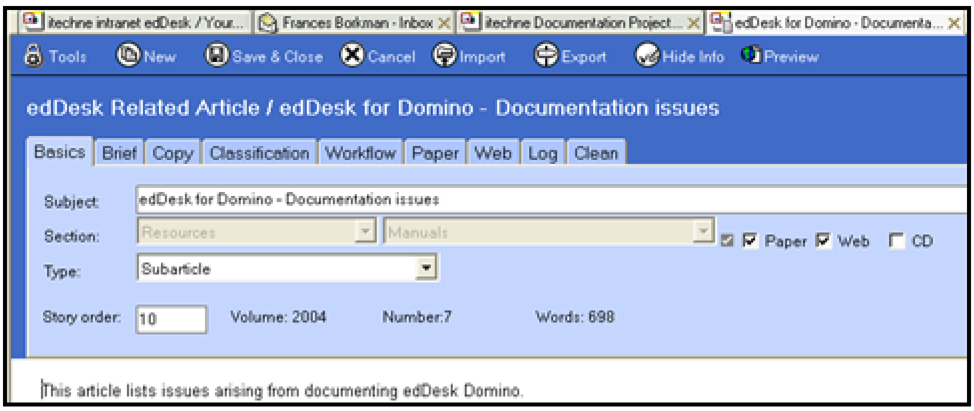


Figure 85: Information shown when article is in Edit mode

2. Click on <*Hide Info*>.
3. The article information is hidden.

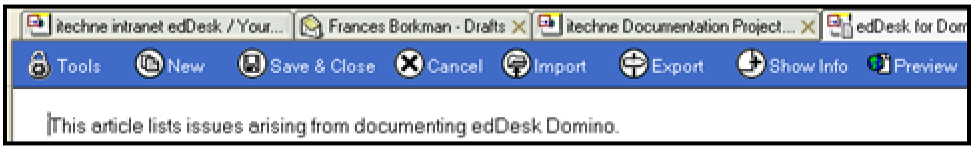


Figure 86: Same article as in Figure 85, above, after clicking on Hide Info

4. Click on <*Show Info*> to see the information again.

10.7 PREVIEW

After you have entered your copy into the article form you can use **Preview** to see how your article would look if published on the web.

> **Note**
>
> This uses the default edDesk template for your site. If your template is highly tailored the display will not reflect the final posted article.

11. Using article tabs

This chapter gives instructions on entering information in the following tabs within articles:

- **Copy** tab – where you enter information about your article. Information entered here is used for headlines, introductions etc, when your article is laid out.
- **Classification** tab –a very important tab where you enter keywords for your article. Keywords are used by the Easy selector and other search features in edDesk.
- **Paper** tab – Information entered here is used by printers and layout people when preparing your article for paper publishing.
- **Web** tab – used when you are "webbifying" your article, for publishing on the web.
- **Log** tab – displays information about the edits made to your article. Very useful when tracking changes that have been made to the article.

Tabs not covered in this section are:

- **Basics** tab – see section 6.3ii: Basics tab
- **Brief** tab – see section 6.3iii: Brief tab
- **Workflow** tab – see Chapter 13: Workflows

11.1 Objectives

By the end of this chapter you should be able to:

- enter information to be used in the printed version of your article
- enter information to be used in a web version of your article
- correctly classify your article with keywords, geographical regions
- amend article classification appropriately
- enter details about the media format to which your article will be published
- enter companies and events with which your article is associated
- add links to an article that will be published on the web.

11.2 Copy Tab

The **Copy** tab is where you enter information about the structure of your article – Title, Headline, Introductory paragraph etc.

The fields in this tab are used by export templates to place their contents in the relevant locations in your publication.

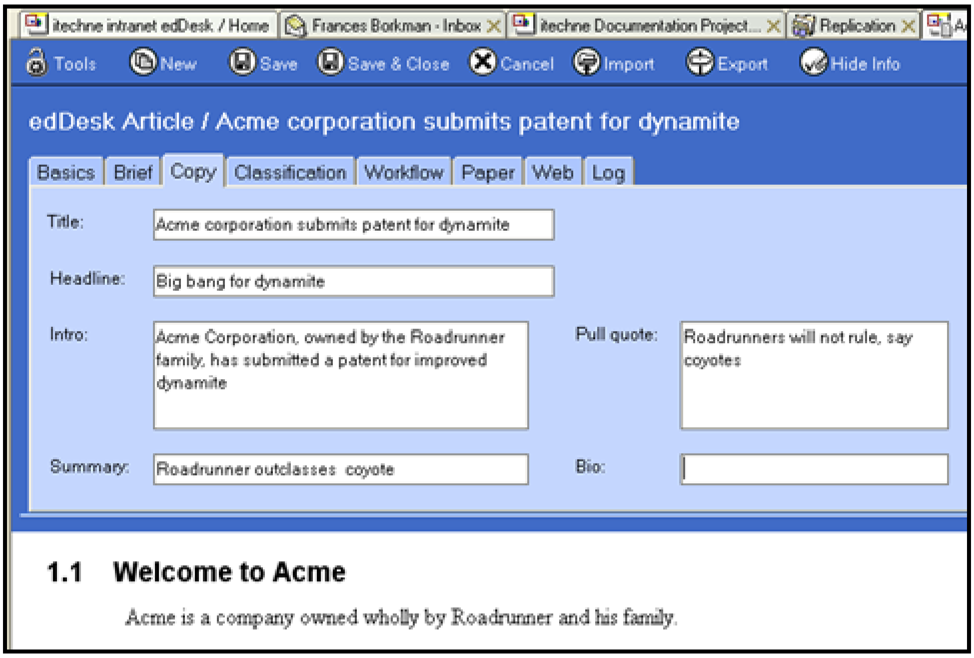


Figure 87: Copy tab

1. Title: Whatever you type in this field is displayed in search results and indexes. Make it meaningful!
2. Headline: The heading for your article. The appearance of this is determined by your template.
3. Intro: Ifyou article has a separate introduction, enter it here. This field is used as the first paragraph of your article, and appears in a style determined by your template.
4. Summary: Enter a short summary of the article. This field is used in section pages. It is also displayed under the article title in search results.
5. Pull quote: **no template uses this field yet.** Enter any quotes that you want to be prominently displayed in your article.
6. Bio: **no template uses this field yet.** Enter a brief biography of the author.

11.3 CLASSIFICATION TAB

The **`Classification`** tab is where you enter keywords, geographical regions where the article is relevant, media format details and companies and people associated with an article. This tab should be completed at the beginning of the subbing process.

A well classified article is easy to find and is indexed appropriately. Information entered in this tab is used by indexes and the Easy Selector.

Many sites allow you to link to other articles with the same classification.

For example, the Wheels magazine site – after the article text there is a heading >> Tags > which lists the classifications applied to this article and lets you link to articles with the same classification.

Figure 88: article classification being used in the >> Tags: part of an article in the Wheels magazine website.

The **`Classification`** tab is divided into four subtabs:

- Keyword Topics
- Geography
- Product
- Other

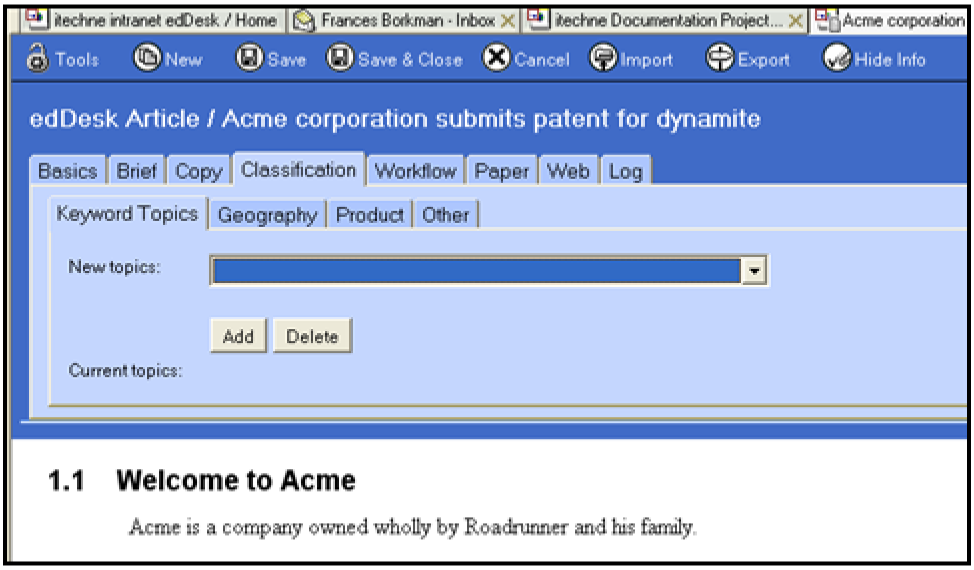


Figure 89: Classification tab, showing the Keyword Topics subtab

Classification options not listed

If your required classification options are not listed you will have to use the **Setup** tab and add Keywords.

ⓘ see section 20.6: Keyword topics for more information.

i Keyword Topics

Keywords entered in the **Keyword Topics** tab are used by the Easy Selector.

1. Click on the dropdown list in the New Topics field.
2. Select the required keyword topic.
3. A list of subtopics is displayed, each with a checkbox.
4. Tick as many of the boxes as are relevant for your article.
5. Click on <*Add*>.
6. Your choices are listed next to Current topics.

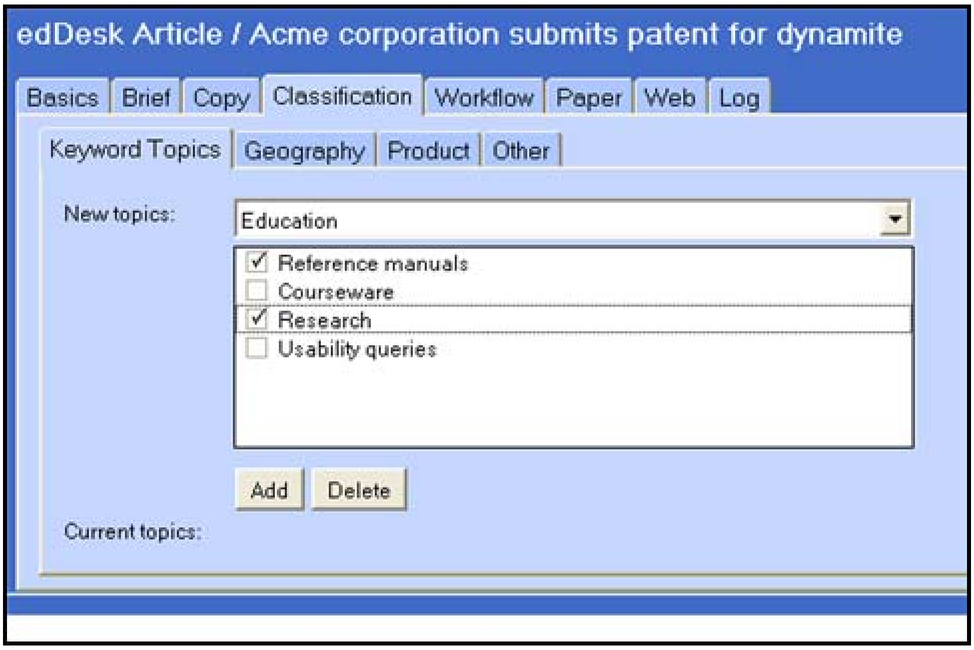


Figure 90: Keyword Topics Education with Reference manuals and Research selected

Need more than one keyword topic?

You can classify your article by more than one keyword topic.

1. Add your first keyword topic and subtopics.
2. Click on the dropdown menu in the New Topics field.
3. Select the required keyword topic.
4. Select the required subtopics from the list.
5. Click on <*Add*>.
6. Your selected keywords are listed in the Current topics field.
7. Repeat steps 2 through to 5 for each separate keyword topic.

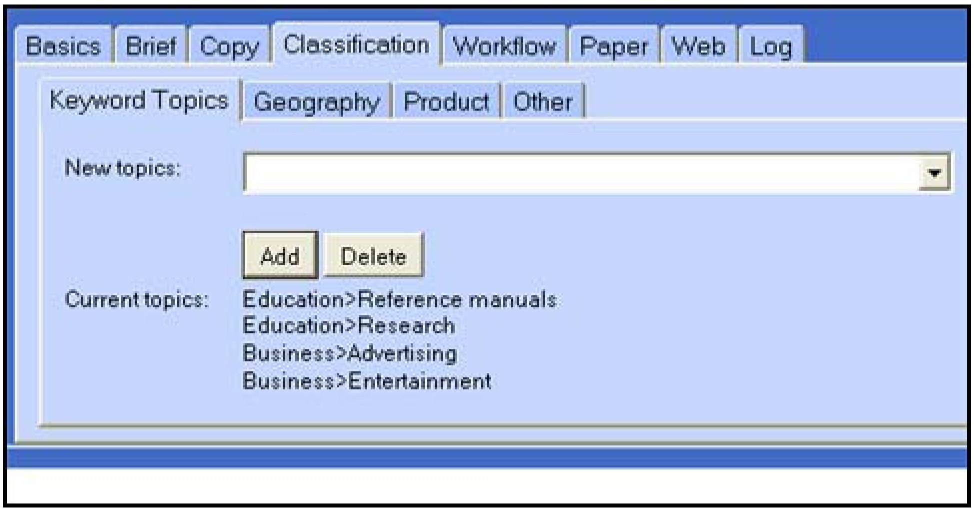


Figure 91: Selected keywords are displayed in the Current topics field. Keywords have been chosen from Keyword Topics of Education and Business.

ii Geography

The **Geography** tab is where you enter the regions where this article is relevant, or the regions to which this article refers.

1. Click on the **Geography** tab. The **Geography** tab is displayed, as below.

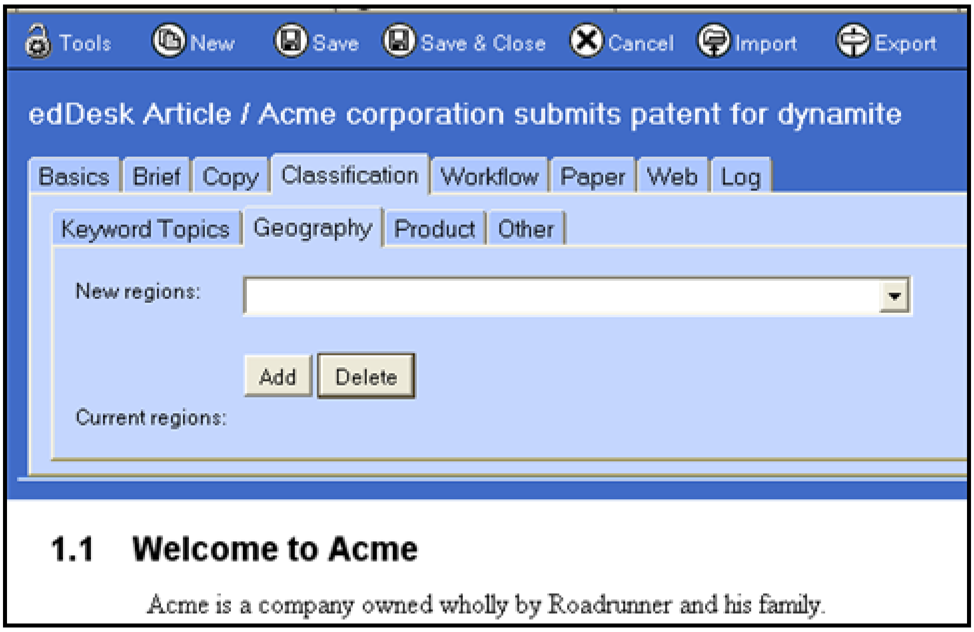


Figure 92: The Geography tab

2. Click on the dropdown menu in the New regions field.
3. Select the required region from the list.
4. A list of areas in that region is displayed, each with a checkbox.
5. Tick as many of the boxes as are relevant for your article.
6. Click on <*Add*>.
7. Your choices are listed next to Current regions.

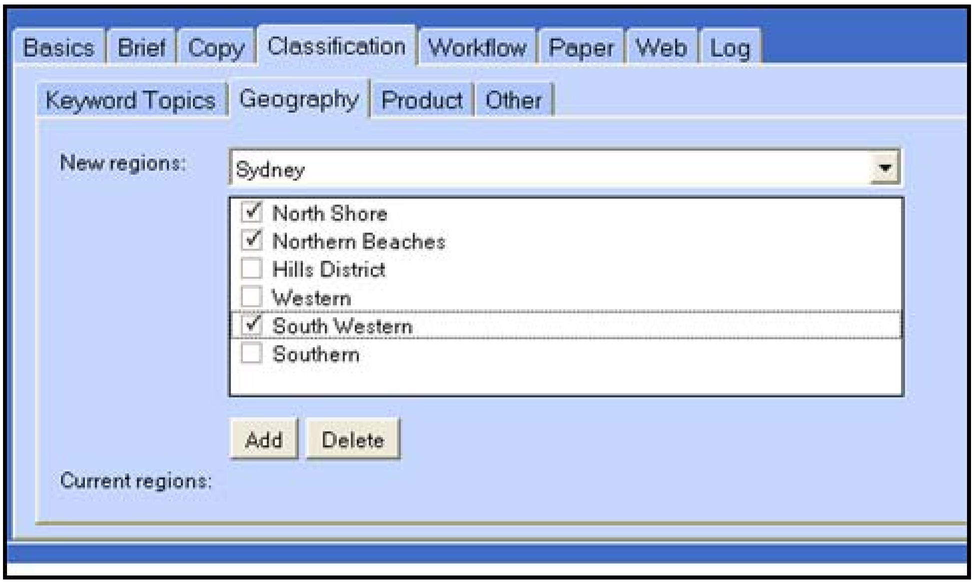


Figure 93: Selected region is "Sydney" with selected areas of North Shore, Northern Beaches and South Western

Need more than one region?

You can classify your article by more than one region.

1. Add your first region and areas.
2. Click on the dropdown menu in the New regions field.
3. Select the required region.
4. Select the required areas in that region from the list.
5. Click on <*Add*>.
6. Your selected regions are listed in the Current regions field.
7. Repeat steps 2 through to 5 for each region you want to add to this article.

iii Deleting Keyword Topics and Geography

If you have added keywords and/or geographical regions that are incorrect, or no longer relevant you should delete them from your article. They will only be deleted from your article – you can still use them in other articles.

1. Go to the **Keyword topics** or **Geography** tab (as appropriate).
2. Click on <*Delete*>.
3. The **Delete topics** dialogue box opens, listing all of the topics in your article.

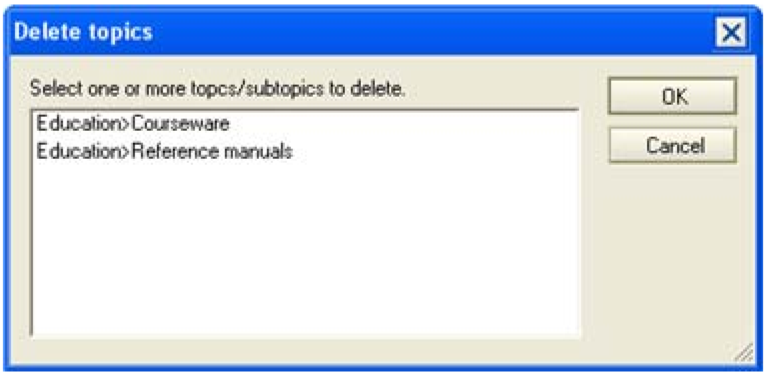


Figure 94: Delete keyword topics - no selection made yet

4. Select the keyword or geographical region to delete.

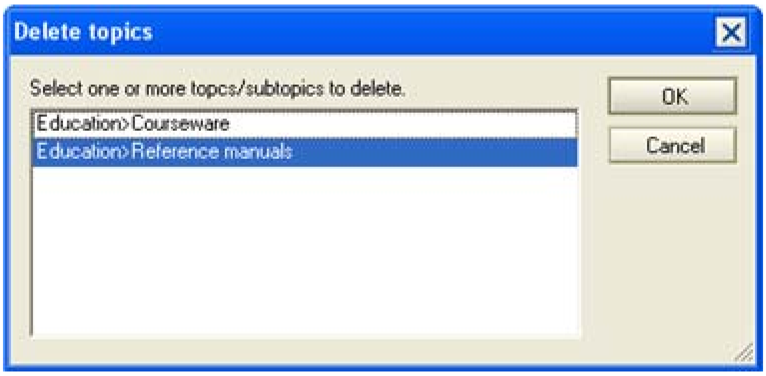


Figure 95: Delete Keyword topics with Keyword topic: Education and subtopic:Reference manuals selected for deletion from this article

5. Click <*OK*>.
6. Your selections are deleted from this article.
7. Your **`Keyword topics`** or **`Geography`** tabs now display your updated classifications.

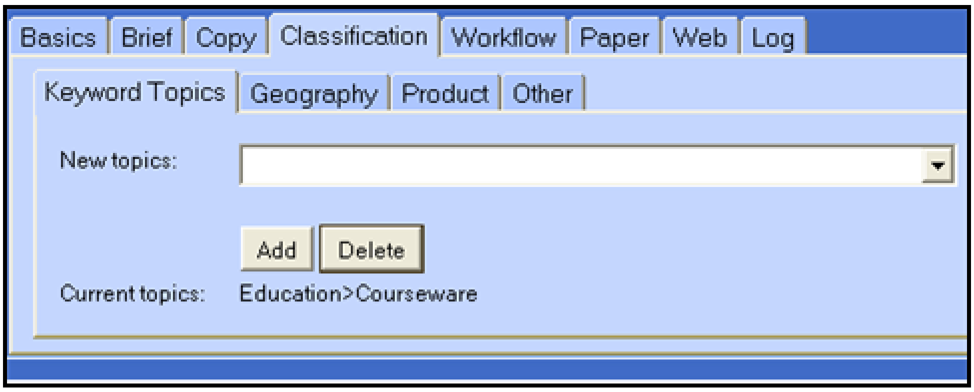


Figure 96: Keyword topics with the Keyword topic "Education>Reference manuals" deleted from this article

Selecting more than one keyword topic or geographical region to delete

1. Go to the **`Keyword topics`** or **`Geography`** tab (as appropriate).
2. Click on <*Delete*>.
3. The **Delete topics** dialogue box displays.

4. Hold down <*Shift*> while you click on the items to be deleted. Each item to be deleted is highlighted in blue.
5. Click on <*OK*>.

iv Product

The **Product** tab is used to enter details of the media format in which your article will be published.

The fields in these tabs comply with the Australian Publishers Association's implementation of ONIX standards.

Product details tab

This tab is where you enter information about the production format, ISBN details, pricing and availability of your publication and article(s).

Order that the fields in the Product details tab are described
Each field is listed in order that you get to it by pressing the <*Tab*> key to move around the form.

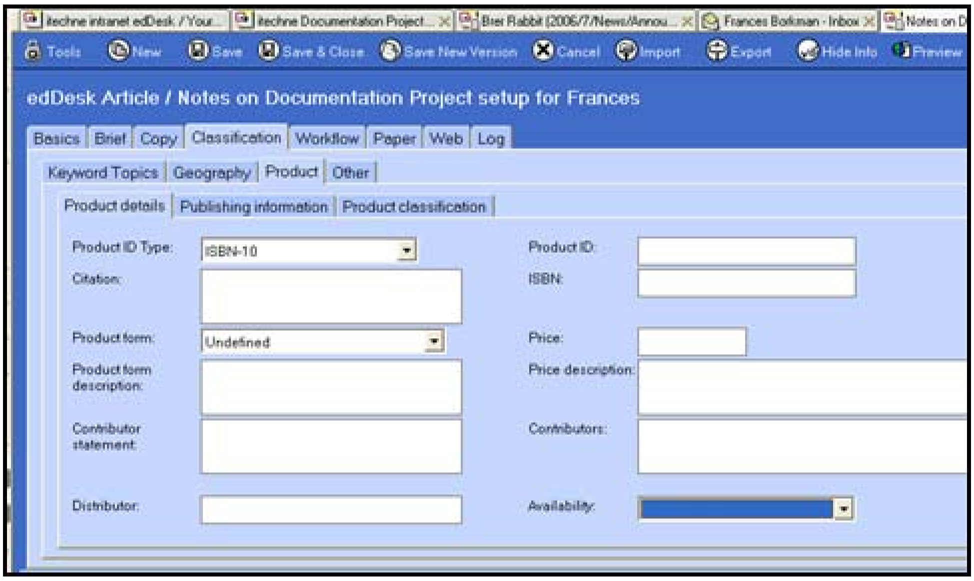


Figure 97: Product > Product details tab

1. ProductID Type: select the type of product ID from the dropdown list. As per ONIX PR.2.
2. ProductID: Use this only if the choice in the ProductID Type field indicates a proprietary scheme. As per ONIX PR.2.8.
3. Citation:
4. ISBN: If your Product ID Type is an ISBN (International Standard Book Number), enter the ISBN number here.
5. Product form: Select the format your final article will be presented as. If you are unsure, leave *Undefined* selected. As per ONIX PR.3.1.
6. Price: Enter the product price, as per ONIX PR.24.27

7. **Product form description**: If the codes in PR3.1 and PR3.2 of ONIX do not adequately describe the form of the product, enter a short description of the product.

8. **Price description**: Further description of the price type, if needed. As per ONIX PR.24.51.

9. **Contributor statement**: Free text showing how the authorship should be described in an online display. As per ONIX PR.8.33.

10. **Contributors**: names of the contributors to this product.

11. **Distributor**: Name of company distributing the final article in the selected format.

12. **Availability**: Select the required option from the dropdown list. As per ONIX PR.24.22.

Publishing information

Order that the fields in the Publishing information tab are described

Each field is listed in order that you get to it by pressing the <*Tab*> key to move around the form.

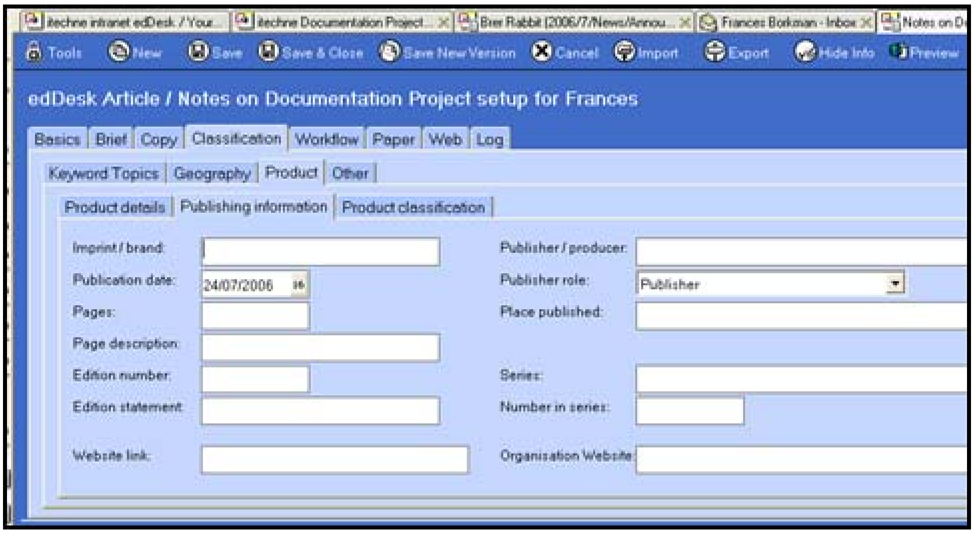


Figure 98: Classification > Product details > Publishing information tab

1. **Imprint / brand**: Full name of the imprint or brand under which the product is issued. As per ONIX PR.19

2. **Publisher / producer**: The full name of the publisher of the product. As per ONIX PR.19.11.

3. **Publication date**: Date of first publication in the market n which it is first released. As per ONIX PR.20.5.

4. **Publisher role**: Select the appropriate role from the dropdown list. As per ONIX PR.19.7.

5. **Pages**: an indication of the total number of pages in a book or other printed format. As per ONIX PR.12.1.

6. **Place published**: City or town of publication.

7. **Page description**:

8. **Edition number**: The number of a numbered edition. As per ONIX PR.10.2.

9. **Series**: The full title of the series. No abbreviations or abridgement. As per ONIX PR.5.6.

10. **Edition statement**: Enter a description of a version or edition. As per ONIX PR.10.4.

11. **Number in series**: The distinctive enumeration of this product within a series. As per ONIX PR.5.7.

12. **Website link**: URL for the website which is related to the publisher identified in the Publisher/producer field. As per ONIX PR.9.21.

13. **Organisation Website**: URL for the website related to the author.

Product classification

Fields in this tab conform to the Book Industry Communication (BIC) international subject classification standards.

> **Order that the fields in the Product classification tab are described**
>
> Each field is listed in order that you get to it by pressing the <*Tab*> key to move around the form.

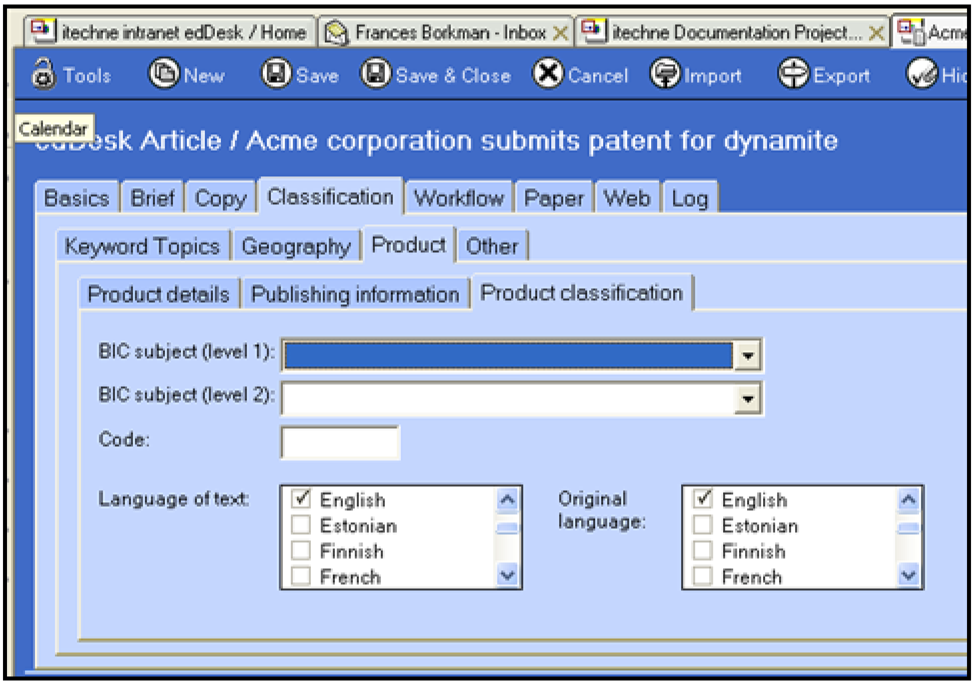


Figure 99: Classification > Product > Product classification tab on entry.

1. BIC subject (level 1): Select the main subject from the dropdown list. As per BIC standards.

2. BIC subject (level 2): Select the secondary subject from the dropdown list. As per BIC standards.

3. Code: This field is automatically completed with the BIC code for the selected subject/secondary subject for the product.

4. Language of text: Select the language for this product from the dropdown list. You can select more than one language. As per ONIX PR.11.1.

5. Original language: If this product has been translated from another language, select the language from which this product was originally translated. As per ONIX PR.11.2.

v Other

The **Other** tab is where you enter companies, events and people with which the article is associated.

Companies keywords are used by the Content Easy selector. See section 4.5: Easy Selector for more information.

1. Click on the **Other** tab. The **Other** tab is displayed, as below.

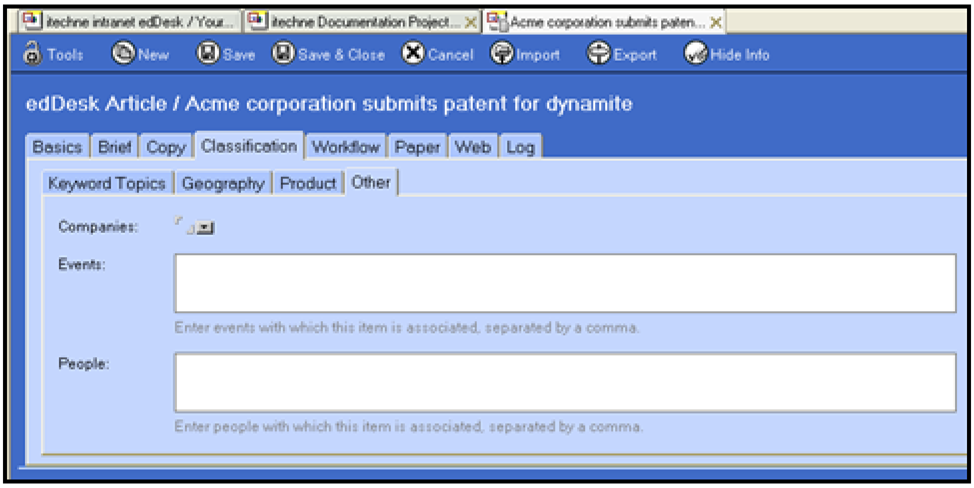


Figure 100: Classification > Other tab on entry.

2. Companies: This is where you enter companies that are associated with this article.

   a. Click on the down arrow next to the Companies field. A list of all companies currently entered in Notes is displayed.

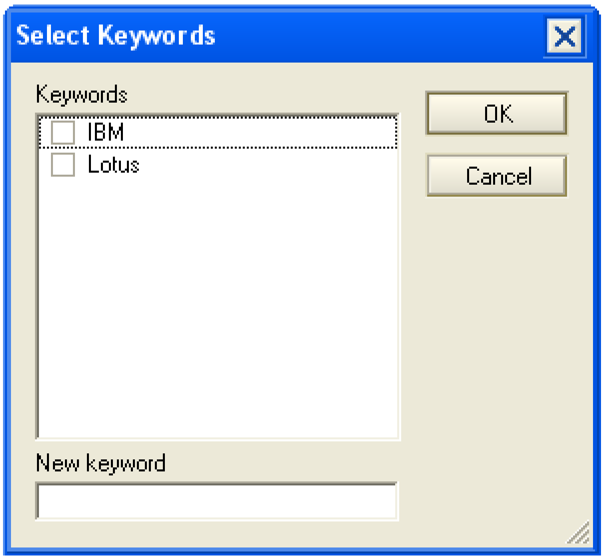


Figure 101: Current Companies dialogue box. No companies are selected yet.

b. Tick the box next each company to add it to your article.

c. New keyword: If the company you want to add to the article is not listed, type the company name in the New keyword field.

d. When you have selected all required companies, click <*OK*>.

e. The **Companies** dialogue box is closed and the **`Other`** tab displays, with your selected companies listed.

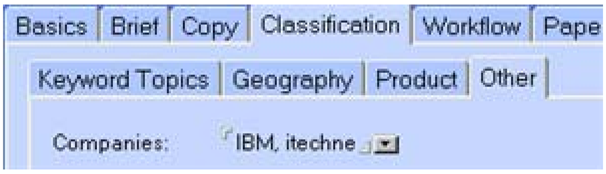


Figure 102: Selected companies. The company "itechne" has been added in the New keyword field of the Companies dialogue box.

3. Events: Enter events with which the article is associated. For example, Press Conferences, Product Launches. Separate each event with a comma.

4. People: Enter people with whom the article is associated. Separate each person with a comma.

11.4 Paper Tab

The **Paper** tab contains information related to the physical layout, production and printing of the article on paper.

> **If you are publishing on the Web…**
>
> If your article is going to be published only on the Web you do not need to enter information in this tab.

Information entered in the Illustation instructions and Production directions fields is displayed in the following views from the **Production** tab:

- Production directions
- Layout

Images must be prepared in the requested format, pixel size and quality in an image editing program before you add them to your edDesk articles. Your editor should specify the image qualities of any image to be used in an article.

ⓘ For more information on attaching images and entering filenames in the hi-res filenames field see Chapter 9: Including documents and images in articles.

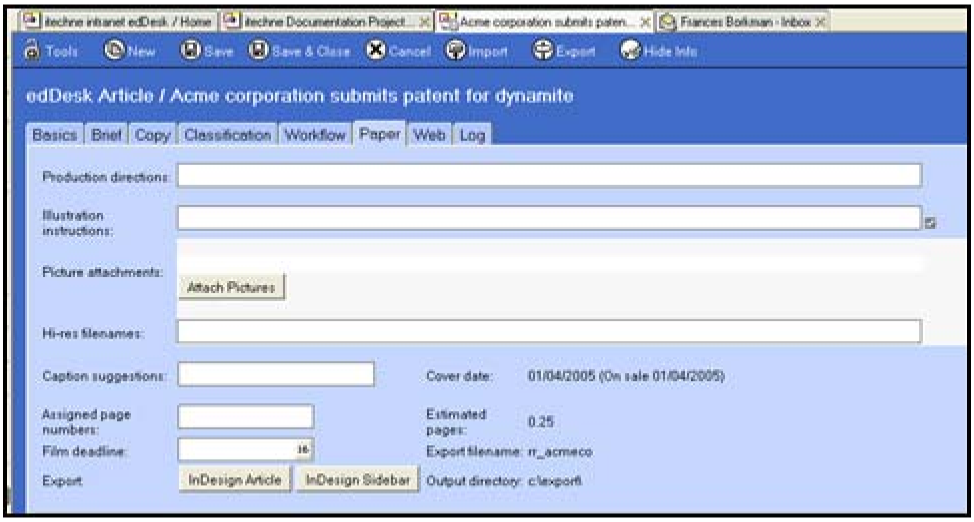


Figure 103: Paper tab when first selected.

1. Production directions – used for general layout and print production instructions. These include whether the article should be laid out on a DPS (Double Page Spread), how to handle images or other design directions or suggestions.

   This field expands automatically if you type a lot of text in it.

Figure 104: Production directions field default

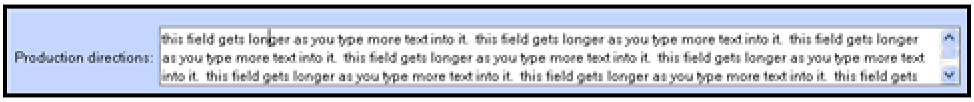


Figure 105: Production directions - automatically expanded, and including word wrapping, to accommodate lengthy text.

2. Illustration instructions – This is the only mandatory field in the **Paper** tab. Enter instructions specific to the positioning of illustrations. This field automatically expands to accommodate lengthy text.

3. Picture attachments – Used when you want to attach **low resolution images** that are not held in the current image directory. The images attached here are usually to be submitted to the design team.

> **Images for use on a website**
>
> Images that are to be used on a website may be pasted directly into the article and do not need to be attached using this field.
>
> **Images stored in the images directory**
>
> This field is not used to upload any images that are already stored in the image directory for layout on paper. You would enter the filenames of such images in the hi-res filenames field.

4. Hi-res filenames – Enter the filenames and locations of the hi-resolution files that are stored in the images directory associated with the article. Each filename should be entered on a new line, or separated with a comma.

Figure 106: Hi-res filenames field with 2 images, each entered on a new line

5. Caption suggestions – Enter any suggestions for captions for illustrations.

6. Assigned page numbers – Take the page numbers from the publication flat plan / grid layout and type them here after the article is exported. This is used in indexes generated by edDesk.

7. Film deadline – Enter the film deadline date here.

   a. If you are not sure of the correct date format click on the **calendar icon**  next to the date. A calendar is displayed.

   b. Click on the correct date.

8. Export – click on the format you want to export your article to.

   a. **InDesign Article** – exports your article to an InDesign file. The filename is automatically selected by edDesk and appears in the Export filename field.

   b. **InDesign Sidebar** - .

11.5 WEB TAB

The **Web** tab is where you enter information about this article if it is to be published on the web (that is Intranets, Extranets and the Internet).

The **Web** tab is divided into five sub tabs:

- Posting details
- Links
- Tools
- Caching
- Metatags

i Posting details

Posting details is the default tab displayed when you click on **Web**. This is where you indicate when your article is to be published and whether people must subscribe to a service to see the article.

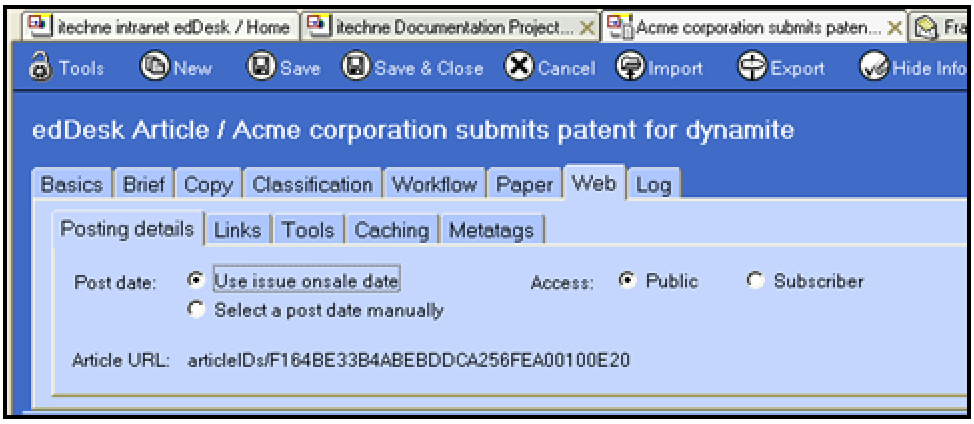


Figure 107: Web tab with default sub tab of Posting details displayed

1. Click on **Web**. The **Posting details** tab displays.

2. Post date – you choose when the article is to be published:

   a. *Use issueonsale date*
   Click on this option if you want to accept the date that the entire volume / issue is to be published. This date is specified by the person who enters information about the Volume and Issue number in the **Production** tab.

   ⓘ see section 20.5: Production schedule – volume and issue definitions for more information.

   b. *Select a post date manually*
   Click on this option if you want to select a particular date for this article to be published. This date may be different from the general publishing date for the Volume / Issue.

      1. After you click this option, click on either <*Save*> or press <*F9*>.

> **Refresh key**
>
> <F9> is Lotus Notes "Refresh" key – if you press this key your screen display is updated.
>
> You can also click on the Refresh icon, .

2. A date field displays. Enter the publish date for your article. Dates must be in the format dd/mm/yyyy. For example, 25/05/2005
3. If you are not sure of the correct date format click on the **calendar icon** next to the date. A calendar is displayed.
4. Click on the required date.

3. Access – who can read your article?
   a. *Public* – when your article is published anyone can read it.
   b. *Subscriber* – when your article is published people are prompted for a login / password to read your article.
4. Article URL – copy the contents of this field if you are linking to this article from other edDesk articles. ⓘ see section 8.9: Creating link (text) hotspots – Linking to other articles and external sites for more information.

ii Links

The **Links** tab may be used to add links to other pages, either on your own website, or on the Internet in general. Export templates determine the display position of those links when your article is published.

If you want to link to other articles, or another website from the text of your article, use Hotspot links.

ⓘ see section 8.9: Creating link (text) hotspots – Linking to other articles and external sites and

ⓘ see section 9.9: Image hotspots for more information.

1. Click on **Links**.
2. Click on *<Add New Links>*.
3. The **Add Links** dialogue box opens.

3.

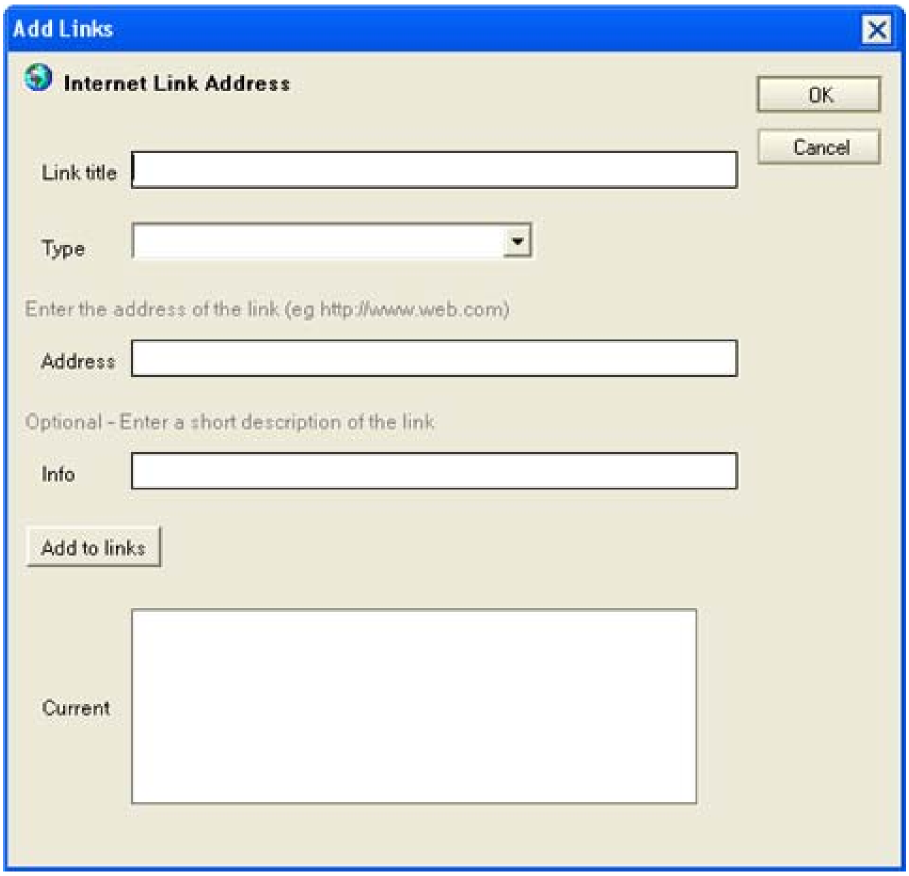


Figure 108: Add new link dialogue box on entry

4. Link title: Enter the words you want to use as the link (this is what people click on to follow your link).

5. Type: select the type of link from the dropdown list. You will then need to complete further fields depending on the link type selected.

   Your link types are:

   - Article on this website
   - Companion website (this is also known as an “extranet”)
   - External website
   - Attachment

   For example, if you select a Type of “Article on this website” you will then have to supply the address for the article.

Article on this website

If you want to link to another article in your own website do the following:

1. Select *Article on this website*.
2. Click on <*Get the address for an article*>.
3. A list of all volumes and issues in your database displays.

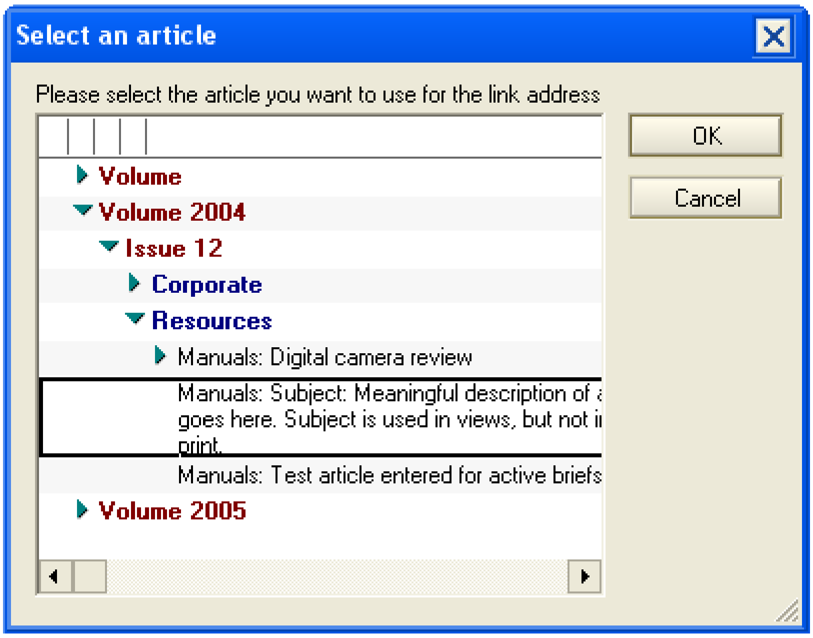
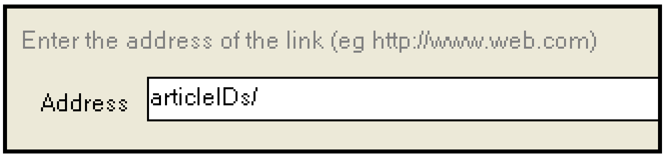


Figure 109: Link type of Article on this website has been selected

4. Drill through the required categories until you have the article listed.
5. Click *<OK>*.
6. The Address field now displays “articleIDs/”.



7. Click on *<Add to links>*.
8. When you have finished adding links to your article click on *<OK>*.
9. The dialogue box closes and you are returned to the **Links** tab.

External website and Companion website

If you want to link to a site on the Internet (that is, external to your own site) or to an Extranet, do the following:

1. Select *External website*.
2. Address: Enter the address of the site in the address field. You will need to enter the entire address.

Easy way to get an external address

Open a browser window (this is probably Internet Explorer).

Go to the address you want to link to. Use your usual method of getting to this address (eg. Search engine, from Favorites, from another site… whatever it takes).

Highlight the entire contents of the Address field and copy it.

Go back to edDesk and display the Links dialogue box.

Paste your address into the Address field.

3. Click on <*Add to links*>.
4. When you have finished adding links to your article click on <*OK*>.
5. The dialogue box closes and you are returned to the **links** tab.

Attachment

Select this option if you want to link to a file that is not a website (this may be a PDF, image, document etc).

> **Note**
>
> You must attach the file to the article before you can link to it.

1. Select *Attachment*.
2. Click on <*Select an attachment*>.
3. A list of all files that have been attached **to this article** is displayed.

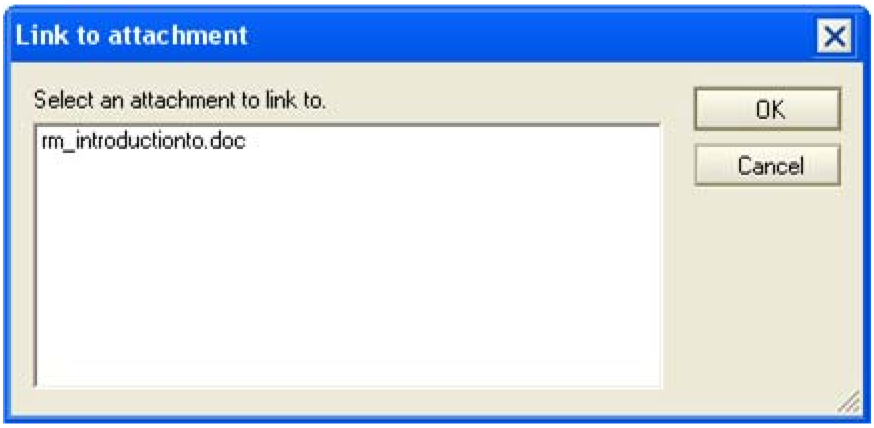


Figure 110: Link type Attachment selected. Lists all files that have been attached to this article.

4. Click on the file to which you want to link.
5. Click on <*OK*>.
6. edDesk enters its own address for the attachment. Do not edit this address!

Figure 111: edDesk's formatting of the address for a linked attachment

7. When you have finished adding links to your article click on <*OK*>.
8. The dialogue box closes and you are returned to the **Links** tab.

iii Tools

The **Tools** tab contains information that is completely customised for each organisation, so is not discussed in this User Guide. Generally the Tools tab contains an option that flags an article so that a web developer can use the information. This option is often used in shopping carts.

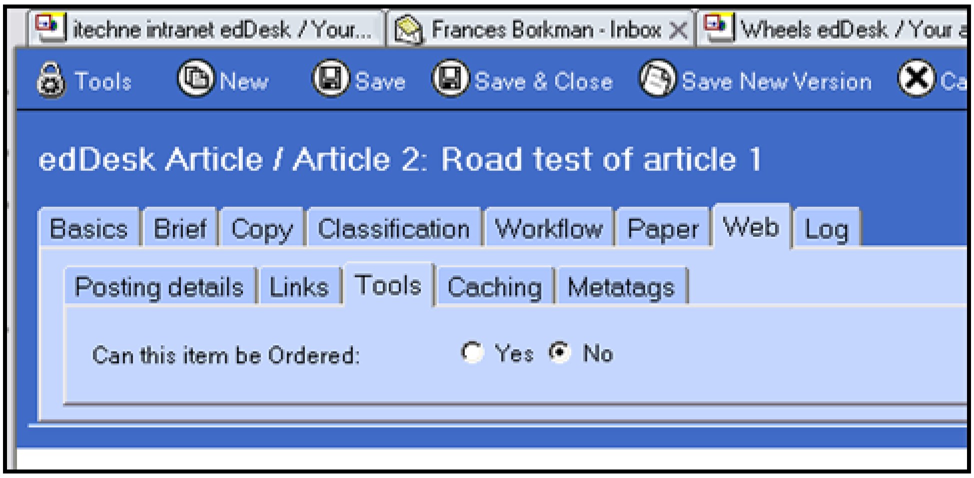


Figure 112: Tools tab

iv Caching

Many websites allow storage of previously retrieved pages. If a person clicks on a link to that page, the already stored version is displayed. This is known as caching. Caching reduces load on the web, making your page faster to display. However, you may not always be looking at the most up-to-date version of a page.

If you have pages where it is imperative that a person be viewing the most recent version, even if it takes longer to display, you can set the caching to never. If it is more important the page display quickly (and not be checked by the browser each time it is requested) then you can set the caching to a longer period of time.

The **Caching** tab lets you set your caching requirements.

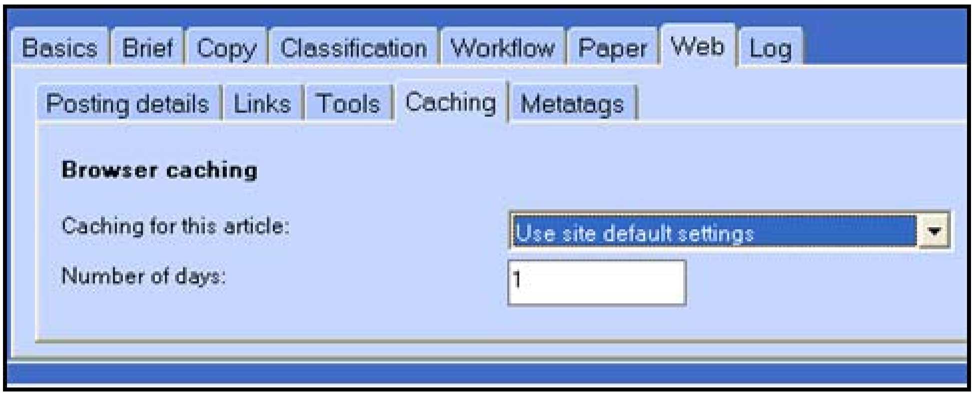


Figure 113: Caching tab with default settings shown.

1. Click on **Caching**.
2. Caching for this article: There are several options available:

- *Use site default settings* – the default value. This is whatever your administrator has set for your site generally. If in doubt, select this option.
- *Never* – select this option if you want the browser to check every time a page is requested. This is for pages which are often updated – and may be updated several times a day.
- *Cache for the same day* – once a page is retrieved, it is cached for the rest of the day. Choose this option if your pages change regularly but not usually throughout the course of a single day.
- *Cache for multiple days* – choose this option if your page is not likely to be regularly updated.

3. Number of days: If you have selected *Cache for multiple days* you must enter the number of days you want your page to be cached in this field.

v Metatags

A metatag is used to describe your page content. Metatags (also known as metadata) are used by search engines to help people find your pages.

edDesk lets you add information about two aspects of pages – keywords and description. These are the most often used metadata fields by search engines.

1. Keywords: add words or phrases that best describe the content of your page. Separate your keywords and phrases with a comma. Keywords that you enter here are appended to the Keyword Topics metadata when the article is posted onto the web.
2. Description. Enter a brief one or two sentence description of your page. The description often appears under a page title when it is listed in search results. Make it meaningful! The Description and Summary fields (Summary field is in the **Copy** tab) are appended to the Description metadata when the article is posted onto the web.

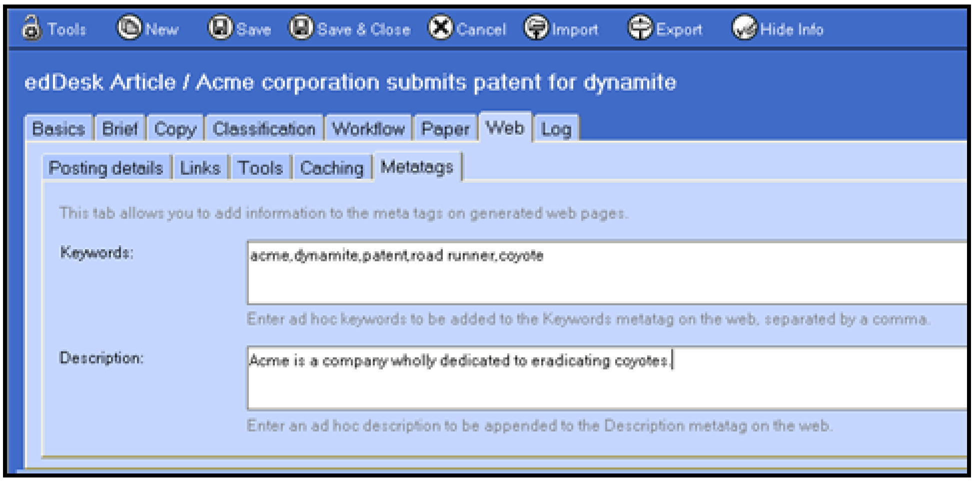


Figure 114: Metatags tab with keywords and description.

11.6 LOG TAB

The **Log** tab records changes made to an article. If the article has been filed, submitted, or exported to a publishing format you can view those versions of the article. A brief revision history, of the five most recent edits, with numbered revisions is also displayed.

You can also use the **Log** tab to attach original wordprocessing files that you do not want to be published with your article. ⓘ see Chapter 9: Including documents and images in articles for more information.

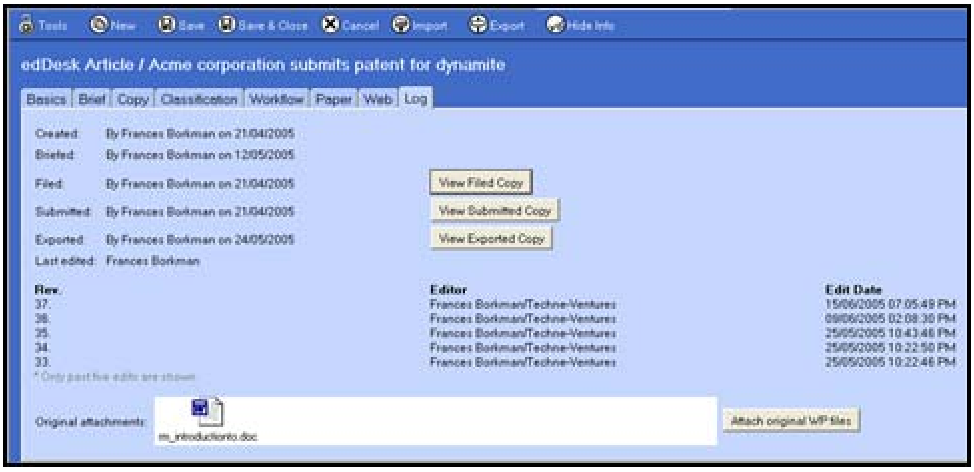


Figure 115: Log tab, listing an attached WP file.

i Viewing filed, submitted and exported versions of your article

You may preview those versions of your article that you have filed, submitted or exported. This depends on you using to **Workflow** tab to update the status of your article.

You may not change the views – just preview the contents of the article as they were at the time of filing, submitting and exporting.

Viewing Filed Copy

1. Click on <*View Filed Copy*>.
2. You will see a preview of the version of the article that you filed.

Figure 116: Preview of filed article text

Viewing Submitted Copy

1. Click on <*View Submitted Copy*>.
2. You will see a preview of the version of the article that you submitted.

Viewing Exported Copy

1. Click on <*View Exported Copy*>.
2. You will see a preview of the version of the article that you have exported to another format.

ⓘ see section 10.5: Export menu for instructions on exporting articles.

12. Creating hierarchical content - related articles

Articles can be in a hierarchy of “related articles”. You can have a “parent” article, usually general information or an introduction, and then create “children” for more specific information. The children can have children of their own – a whole “family”.

A hierarchy makes it easy to order your story, move the separate elements around and insert more related articles.

edDesk displays the related articles (parents and children) with the children indented under the parent. You can have as many levels as you need.

12.1 Objectives

By the end of this chapter you should be able to:

- create related articles
- create several levels of related articles
- order your articles
- reorder your related articles within their hierarchical level
- move articles to another level in a hierarchy.

12.2 Example of an Article Hierarchy

Below is an example of a hierarchy of related articles. There is also an explanation of how each article relates to its hierarchy.

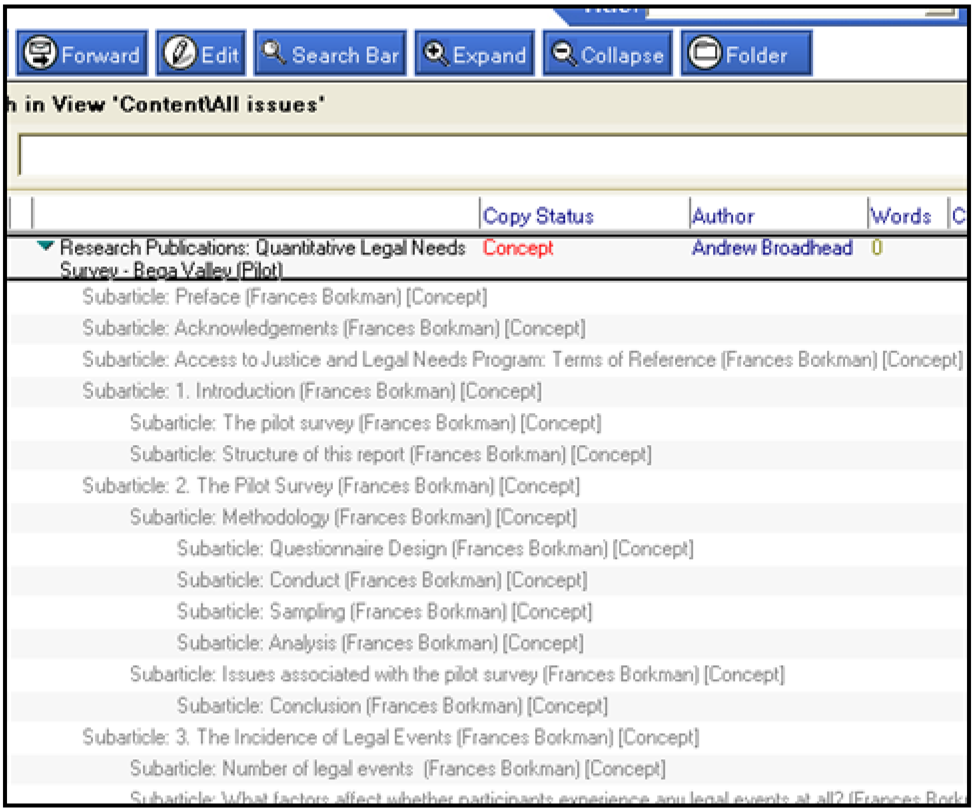


Figure 117: Example of parent article Quantitative Legal Needs Survey - Bega Valley (Pilot) with some of its children

Each level of the hierarchy is indented from its parent. Articles at the same level in the hierarchy are indented the same amount.

In the example above, the following subarticles are at the same level in the hierarchy:

- Preface
- Acknowledgements
- Access to Justice and Legal Needs Program: Terms of Reference
- 1: Introduction
- 2: The Pilot Survey
- 3: The Incidence of Legal Events

Note

In the above example the structure has been taken from a report with numbered chapters. The numbered subarticles refer to chapter numbers only and have been entered as part of the article subject.

In addition the following subarticles have children of their own:

1: Introduction

- The pilot survey
- Structure of this report

2: The Pilot Survey

- Methodology
- Issues associated with the pilot survey

3: The Incidence of Legal Events

- Number of legal events
- What factors affect whether participants experience any legal events at all? (this one only partly visible at the bottom of the example)

The fourth hierarchical level contains the children of Methodology:

- Questionnaire Design
- Conduct
- Sampling
- Analysis

12.3 THE IMPORTANCE OF STORY ORDER IN A HIERARCHY

Story order determines where an article is placed in a hierarchy. Story order is a mandatory numerical field that is filled in when an article is created. Story order can be changed if you want to move an article within a hierarchy.

Use **century numbering** when creating articles and the first level of subarticles. Century numbering means that each article is given a number expressed in whole hundreds – for example 100, 200, 300. You can continue to use century numbering for all levels of your hierarchy (although it is equally common to number articles further down the hierarchy in tens).

Century numbering allows you to insert extra articles into a hierarchy, without having to change the story order in all the articles that you want to be after your inserted article. To maximise the number of articles that you can insert easily, it is best to give your inserted article a number as close to the middle of the numbers you are inserting between.

For example, you have numbered your articles 100, 200, 300, 400. You now want to place another article between those numbered 300 and 400. You could give your inserted article a number of 350. If you then decide to insert another article between 300 and 350 you could give that article a story order of 325 (or any number between the numbers you are inserting between).

The numbers in the example below indicate the story order for each article and its related articles. For clarity of the following diagram, each hierarchical level has its story order in the same colour. You do not see the numbers until you edit an article.

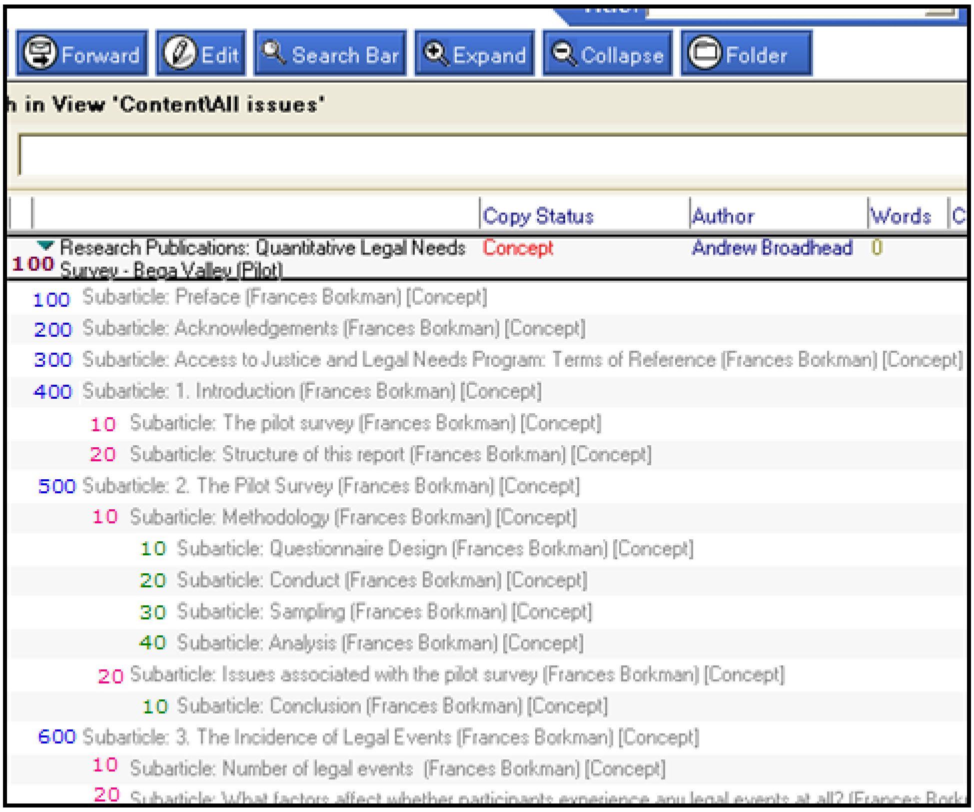


Figure 118: 4 levels of article hierarchy with the story order shown.

Numbers are restarted for the children of each parent.

In the example above you can see that a second level subarticle: **1: Introduction** has two children. They are numbered 10 and 20. The next second level subarticle **2: The Pilot Survey** also has two children. They also are numbered 10 and 20.

12.4 CREATING A RELATED ARTICLE

Related articles can be created by three methods:

- when you are editing the article that is to be the parent article
- when you are in a view and have clicked on an article to select it
- when you have opened an article, but have not selected <*Edit*>.

These methods all have the same result – a new article that is a child of the selected article.

i The three methods of creating related articles

From editing the article that is to be the parent

1. Open the article that you want to be the parent.
2. Go into **Edit** mode.
3. Click on <*New*>.
4. Select *Related Article*.

When you are in a view

You cannot create a related article from all views – only those views that have a toolbar at the top.

Figure 119: Toolbar at top of a view from which you can create a Related Article

1. Scroll to the article that you want to be the parent.
2. Click once on the article. The article summary is highlighted with a rectangle.

Figure 120: Selected article is highlighted with a rectangle

3. Click on <*New*> in the toolbar.
4. Select *Related Article*.

When you have opened an article, but are not yet editing the article

1. Open the article that you want to be the parent.
2. Click on <*New*>.
3. Select *Related Article*.

ii Filling in article details

After you have selected *Related Article* the **Related Article** form displays.

Figure 121: Initial form displayed after Related Article is selected

Unavailable fields

Related articles automatically inherit some values from their parent. Fields that inherit values (and that you do not need to enter details for) are:

- Section
- Subsection
- Volume

- Number

Tabs you need to complete for each related article

Each child article needs to be tracked through workflow, status and briefing instructions independently of its parent article. This is because you might have a parent article by one writer and child articles by various other writers. Although the entire article will be published at once (hence the same volume, issue details) there will be different authors and workflow statuses for each child article.

Take, for example a magazine car supplement. You might have a main article written by one author, a series of reviews of car models by individual other review writers, and a series of sideboxes from yet another author. Each related item will have different authors, status (briefed, filed, subbed etc), briefing instructions and copy deadlines etc.

ⓘ see Chapter 13: Workflows for instructions on entering information in the **`Workflow`** tab. (Section 13.2: Workflow for authors has instructions forauthors.)

ⓘ see section 6.3iii: Brief tab for instructions on entering information in the **`Brief`** tab.

ⓘ see Chapter 7: Entering copy into edDesk for instructions on entering your copy into articles.

ⓘ see Chapter 11: Using article tabs for instructions on using the various tabs available in articles.

Filling in the Basics tab

1. Subject: enter a meaningful description for this related article.

2. Type: What type of article is this? The default type is *Subarticle*. The type is displayed in several views. Make sure you select a type that is meaningful and conveys what the article contains.

   For example, if you are writing a book you might like to have a type of Chapter. If you are creating a related article for graphics and charts, select a type of Graphics & Charts.

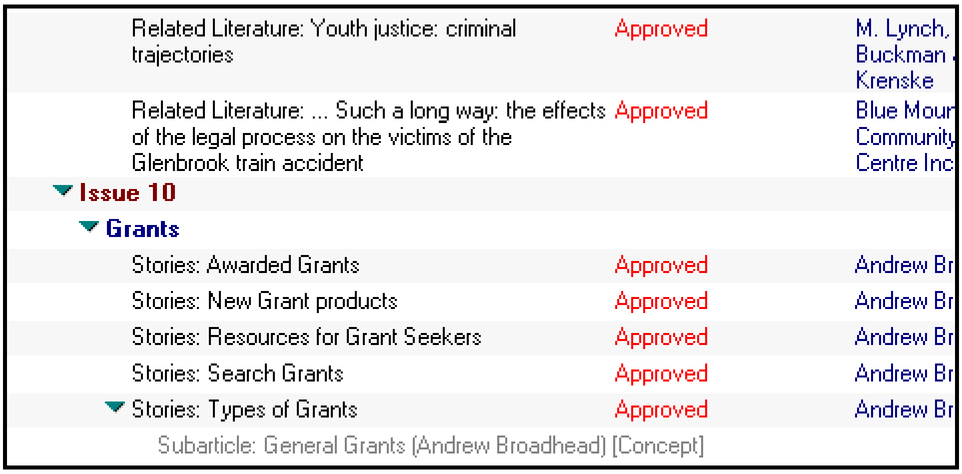


Figure 122: Some of the available types of article and related article

In *Figure 122*, above, the article / related article type is displayed as the text before the colon. Types listed above include: *Related Literature, Stories, Subarticle*.

3. Story order: enter the order that you want this related article to appear under your parent article. If this is the first child of the parent article you would usually have a story order of 10, second child would be 20 and so on.

12.5 SAVING YOUR RELATED ARTICLE

1. Complete all required fields and tabs.
2. Do one of the following:
   - Click on *<Save & Close>* if you want to save and close your related article (you can do further edits later) OR
   - Press *<Ctrl>+s* to save your article but continue editing it.

12.6 CREATING SEVERAL LEVELS OF RELATED ARTICLES

You may have as many levels of related articles as you wish. Many magazines have two levels. Some academic reports may have four levels.

i Creating two levels of articles

The instructions presented in section 12.4: Creating a related article apply to two levels of articles. The parent article is the first level, the related article is the second level.

ii Creating more than two levels of related articles

More than two levels of related articles

Although edDesk allows you to create several levels, there are a few steps that must be done. Follow the instructions below.

Note about diagrams used in this section

The diagrams used in this section follow the creation of a related article that is in the fourth level of a hierarchy. Any asterisks appearing in the diagrams are for emphasis in the instructions only – they do not display in edDesk.

1. Go to a view that lists all the articles in a hierarchy. Views that do this are **All Issues** and **Sections**.
2. Click on the article that you want to become the parent.

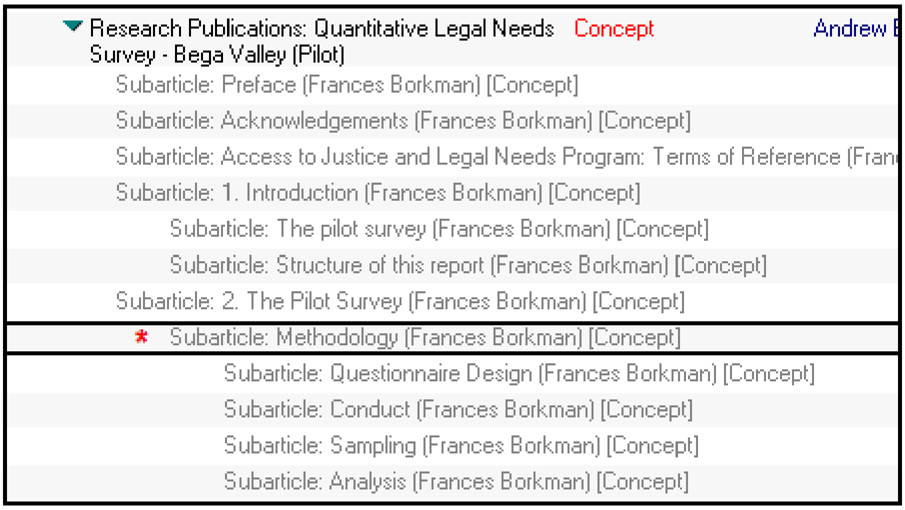


*Figure 123: Future parent is the subarticle Methodology - outlined with a rectangle. Methodology already has four children. Parent article is indicated with * for emphasis.*

3. Click on <*New*> in the toolbar.
4. Select *Related Article*. Your new related article is opened.
5. Fill in the article fields as appropriate.

Figure 124: Related article with Type of "Other collateral" and Story order of "50" as we want this article to be listed as the 5th child of the selected parent.

6. <*Save & Close*> your related article.
7. You are now returned to the view from which you created a related article. Your article is NOT where you wanted to put it! That is, it is not shown as a child of the desired parent.

   Your related article is always initially displayed as a second level article, no matter which level of the hierarchy you want to put it in. You need to move it to the required place in the hierarchy.

   Remember that parent and the first level child articles use century numbering (100, 200 etc) for their story orders. If your related article has a story order less than 100 it will be listed underneath the topmost parent.

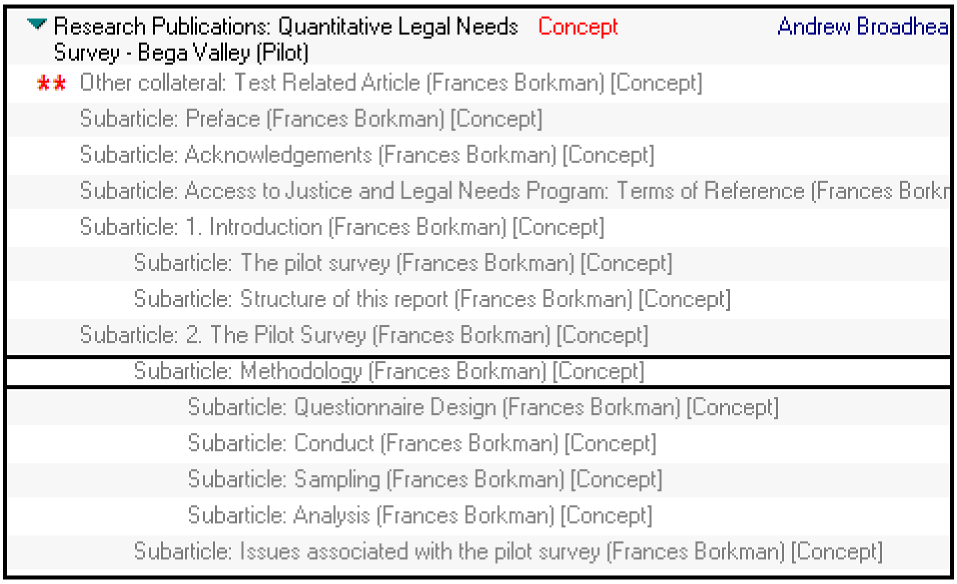


*Figure 125: New article (example used in Figure 104) in incorrect place in hierarchy. Article is indicated with ** for emphasis.*

8. Click once on the child article that you want to move to the correct place in the hierarchy. Your article is now highlighted with a rectangle.

Figure 126: selected child article to be moved to correct place in hierarchy. Selected article is highlighted with a rectangle.

9. Cut your article from its current place in the hierarchy by doing one of:

- *<Ctrl>+x;* OR
- select the **Edit** menu then select *Cut.*

10. Click on the correct parent article. The parent article is now highlighted with a rectangle.

Figure 127: Parent article highlighted with rectangle. The child article you have just cut will be pasted under this parent.

11. Paste your child article into its correct place in the hierarchy by doing one of:

- *<Ctrl>+v;* OR
- select the **Edit** menu then select *Paste.*

Your child article is now in the correct place in the hierarchy. You will need to repeat this procedure for each child article that is higher than the second level in a hierarchy.

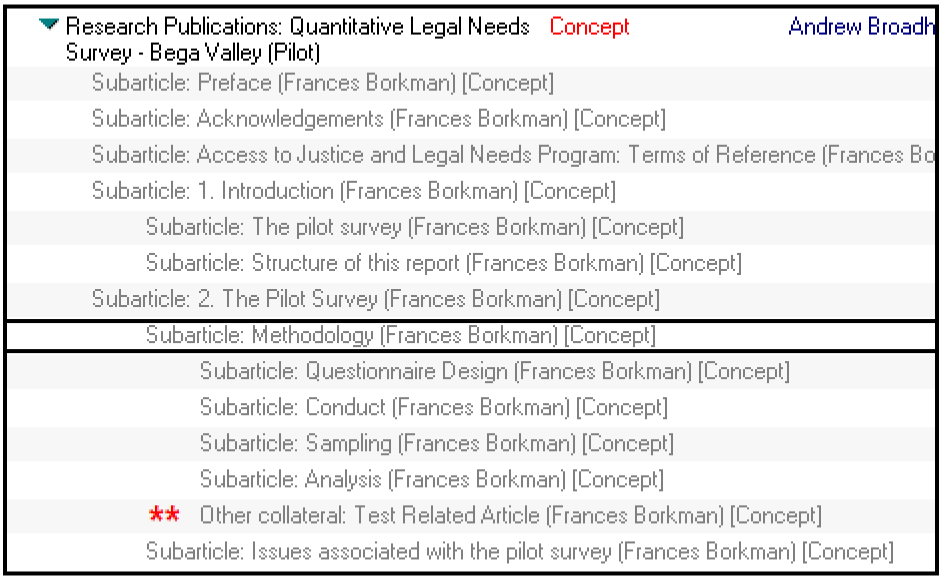


Figure 128: Related article now pasted into the correct place in the hierarchy - as a child of Methodology

12.7 Reordering your articles – moving them around within a hierarchical level

If you want to reorder your articles you need to change their Story order. This is made much simpler if you use either century numbering (or numbering by tens).

Following the example used through section 12.6: Creating several levels of related articles…

If we now want our new related article, "Test Related Article" to be listed as the third child of the parent (Methodology), we need to make sure that the story order for "Test Related Article" is given a number between the current second (Conduct) and third (Sampling) articles. They have a story order of 20 and 30 respectively.

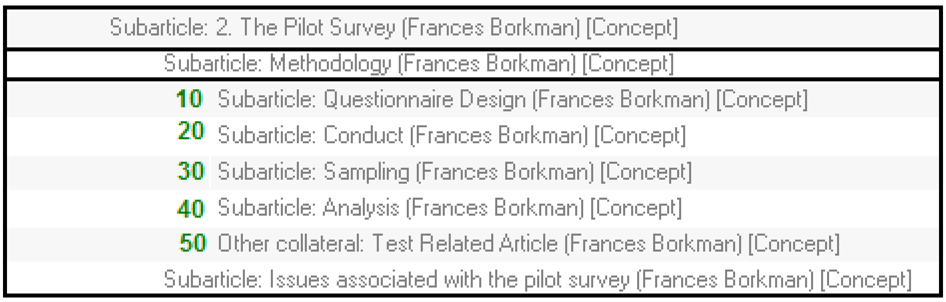


Figure 129: Original story order with "Test Related Article" having story order of 50 and listed as the fifth child of "Methodology"

"Test Related Article" can be given a number anywhere between 20 and 30, but in case we want to insert other articles, it is best to change its story order to 25 – halfway between 20 and 30.

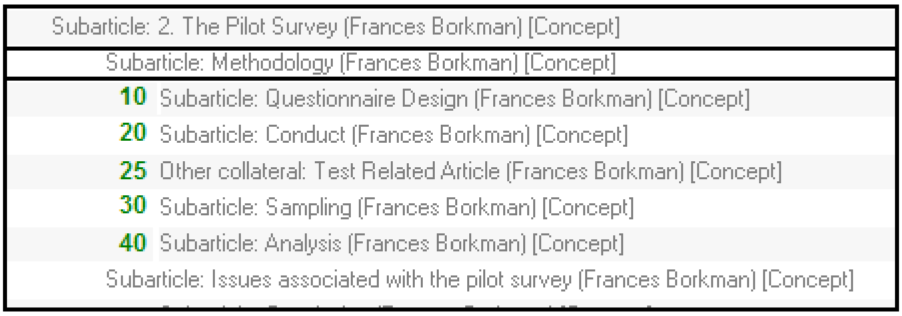


Figure 130: "Test Related Article" with story order 25 - now listed as the third child of "Methodology"

1. Open the article you want to move.
2. Go into **Edit** mode.
3. Change the Story order so that your new number is between the article you want to be listed before and the article you want to be listed after your moved article.
4. *<Save & Close>* your changes.
5. Your article is now displayed in its new position in the hierarchy.

12.8 MOVING YOUR ARTICLES TO ANOTHER LEVEL OF A HIERARCHY

1. Click once on the article that you want to move to another place in the hierarchy. Your article is highlighted with a rectangle.
2. Cut your article from its current place in the hierarchy by doing one of:
   - *<Ctrl>+x;* OR
   - select the **Edit** menu then select *Cut.*
3. Click on the article that you want to be the parent article. The parent article is highlighted with a rectangle.
4. Paste your child article into its new hierarchical place by doing one of:
   - *<Ctrl>+v;* OR
   - select the **Edit** menu then select *Paste.*
5. Your article has now been moved to a new place in the hierarchy.

13. Workflows

Workflow is the tracking of the status and progress of an article through the publishing process.

Information entered in the **Workflow** tab is used in many views, especially those in the **Editing** tab.

For example, the view **Changes required** relies on information entered in the workflow tab of articles. If the information is not entered then an article won't be listed in the view – even if there really are changes required!

13.1 OBJECTIVES

By the end of this chapter you should:

- understand what is meant by "workflow"
- understand the importance of updating information in the **Workflow** tab
- be able to correctly update workflow information
- know when to update the copy status
- know when to use print status
- know when to use web status
- be able to save different versions of an article
- be able to change the versioning settings for an article.

13.2 WORKFLOW FOR AUTHORS

Authors usually need to know how to file an article. Sub-editors and editors require a more in-depth knowledge of workflow. This section gives instructions on workflow as used by authors/article contributors.

1. Enter your copy into the article and format it appropriately.
2. Save the article.
3. Go to the **Workflow** tab. Look at the article's Copy status – it is probably *Briefed*.
4. Click on the dropdown list next to Copy status:
5. Select *Filed*.
6. *<Save>* or *<Save & Close>* the article.

13.3 WORKFLOW TAB

The **Workflow** tab tracks the progress of the article through the editing process. This section is primarily for editors, system administrators and your webmaster. Authors do not usually need to know as much about workflow as is in this section (see section 13.2: Workflow for authors).

The status of three publishing procedures is tracked:

- Copy status
- Print status
- Web status.

This tab is displayed differently depending on whether you are editing a parent article or a child article (subarticle). However, the same types of information may be entered in each tab.

A parent article (and first level articles) has separate subtabs for Status, Editing notes, Changes requests and versioning. A subarticle combines these into the single **`Workflow`** tab.

ⓘ see section 6.2: What is an article? and

ⓘ Chapter 12: Creating hierarchical content – related articles for more information on related (parent and child) articles.

Parent article

A parent article displays the **`Workflow`** tab with subtabs. This allows more detailed information about changes required and editing notes to be entered for the parent.

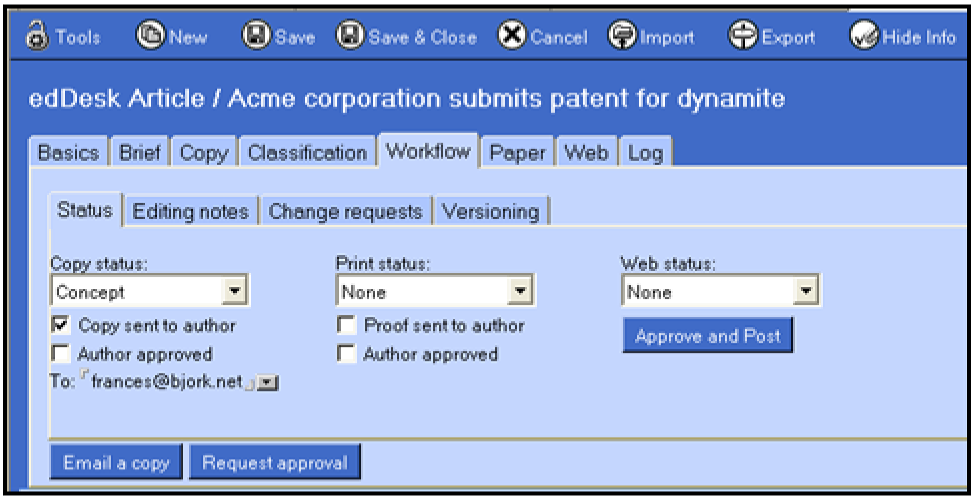


Figure 131: Workflow tab with subtabs - parent article

Child article

A child article displays the workflow tab on a single form. This allows you to see a more summarised version of information than in the subtabs of the parent article.

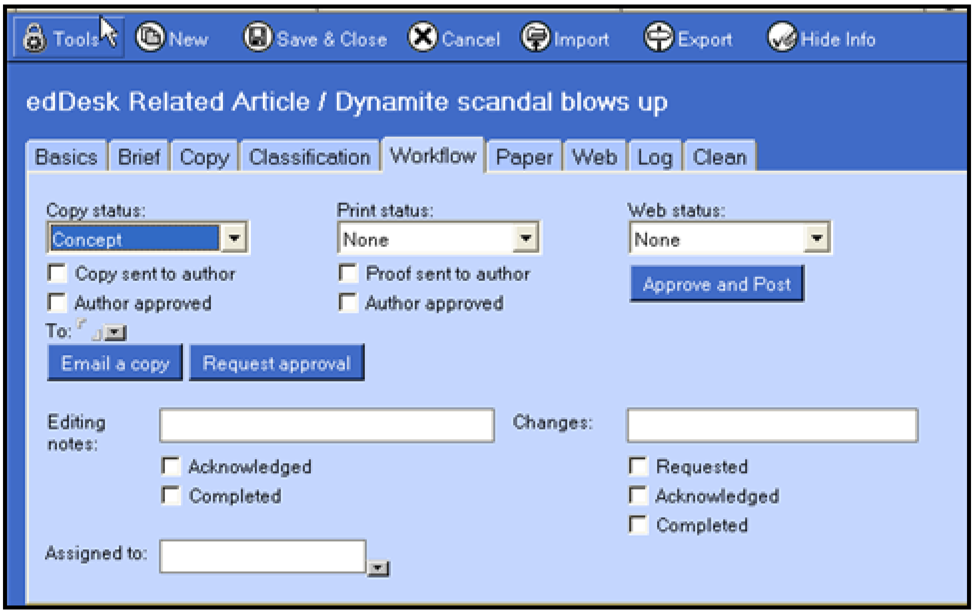


Figure 132: Workflow tab on single form – related article

ii Copy status

This is initially set to **Concept**. Concept means that there is a story idea (articles with the status of concept are listed in the **Story ideas** view) but the article has not yet been briefed to an author.

Copy status will not automatically perform tasks for you! It only indicates that you have done some other task associated with moving the article through the publishing process.

For example, if you have already filed the article you would then go to the Workflow tab and update the Copy status. However, if you just update Copy status and the article has not really been filed edDesk will **not** do the filing for you – it updates the status only.

1. Copy status: Click on the dropdown arrow next to the current status.
2. Select the article's new status.
3. Copy sent to author: Check this box when you have sent the edited copy to the author for approval.
4. Author approval: check this box when you have received approval of the edited copy from the author. (This may not always be required.)
5. To: Enter the author's email address here. If you have the author in an address book already, you can click on the down arrow next to the To field and select them from that address book.
6. Email a copy: Click on this button to email the edited article to the author. The email is sent to the address entered in the To field.

7. Request approval: Click on this button to request approval for the edits from the author. The email is sent to the address entered in the To field.

iii Print status

You do not need to update this status if the article is going to be published on the web only. The Print status is only updated after the edited article has Copy status **Approved**.

> **Note**
>
> Print status should be updated **after** the copy status is set to Approved.

1. Check that the Copy status is set to *Approved*.
2. Select the Print status. Often it will change from *None* to *Laid Out*.
3. Proof sent to author: Check this box when the proof has been sent to the author or client for approval. (This may not always be required.)
4. Author approved: Check this box when the author or client has approved the proof. (This may not always be required.)

iv Web Status

You only need to update this status if your article is to be published on the web.

The following statuses are available:

- *None* – not going to be published on the web
- *Pre-web* – has not yet been prepared for web publishing
- *Webified* – has been prepared for web publishing
- *Preview* – available for your team to preview and review
- *Posted* – has been published on the web
- *Archive* – old article. Probably no longer generally available for viewing, but has been archived so it can be retrieved if required.

1. Click on the required web status.
2. **Approve and Post**: If your article has a Copy status of **Approved** (check the workflow status) and the article is ready for publishing on the web click on *<Approve and Post>*.

   <Approve and Post> runs a script that changes your article's workflow status to **Approved** (if it does not already have this status) and publishes your article.

13.4 EDITING NOTES

Editing notes are entered by an editor after the story has been submitted. They are for any editing related comment.

Editing notes are displayed in the Notes field of the **Subs work desk** view (from the **Production** tab).

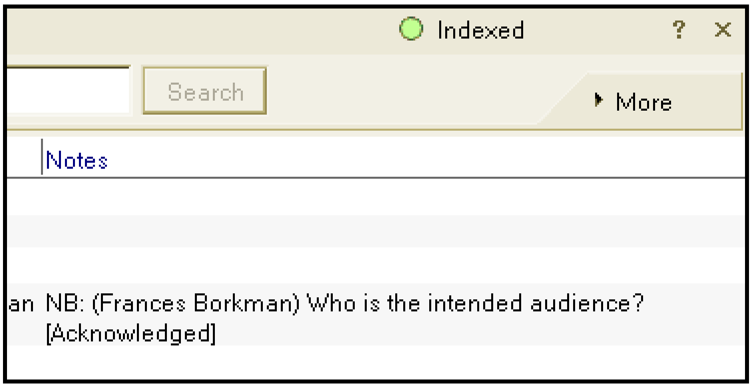


Figure 133:Notes field of the Subs work desk view. This field has the assigned person as Frances Borkman and also indicates that this editing note has been acknowledged.

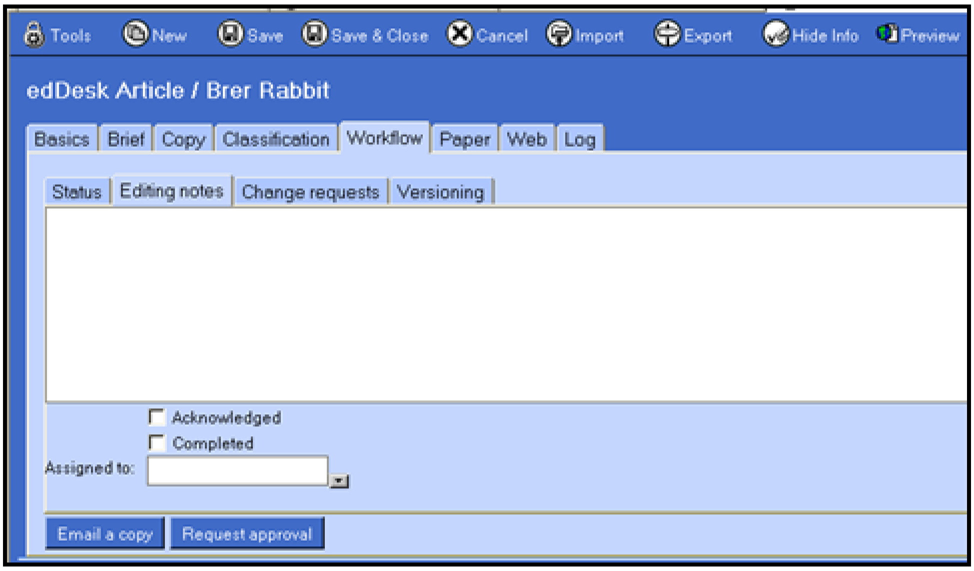


Figure 134: Editing notes tab (for a first level article).

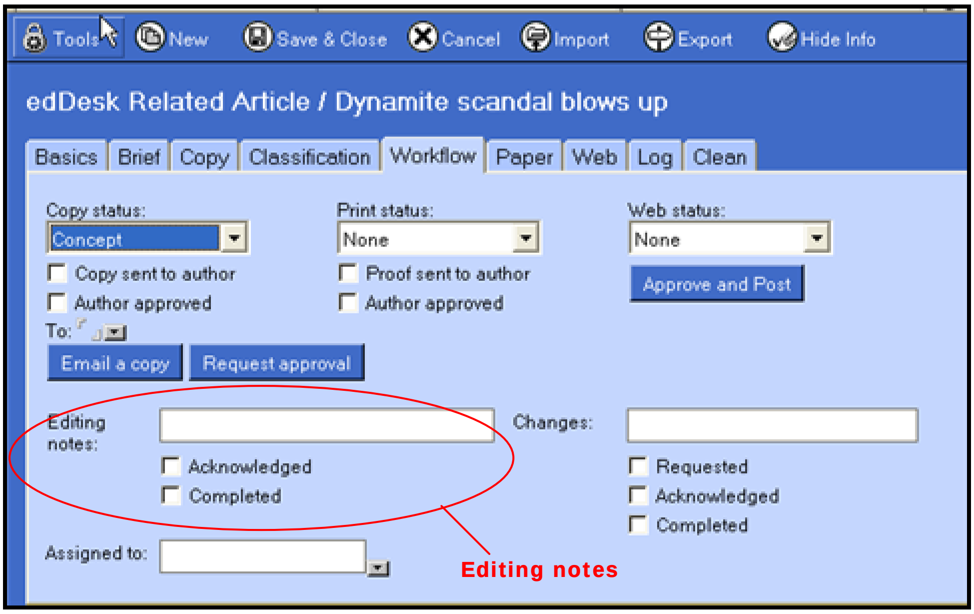


Figure 135: Editing notes field in a subarticle.

1. Go to the **`Workflow > Editing notes`** tab (for a first level article) or to the **`Workflow`** tab and Editing notes field in a subarticle.
2. Type your editing note.
3. Assigned to: Enter the email address of the person who will be responding to the editing note – usually this will be the author.
4. Click on <*Email a copy*>. An email, containing the text of the article is sent to the author.
5. Save your article.
6. When the editing note has been acknowledged tick the *Acknowledged* box. The **Subs work desk** view shows the person to whom the editing note was assigned and whether it has been acknowledged.

> **Completed editing notes**
>
> When an editing note has been completed the note is no longer listed in **the Subs work desk** view.

13.5 CHANGE REQUESTS

Editors can use the **`Change Requests`** tab to request changes to be made to an article. After an author has made the requested changes the **`Change requests`** tab must be updated.

Updates made in the **`Change requests`** tab appear in the **Changes required** view (from the **`Production`** tab and the **`Editing`** tab).

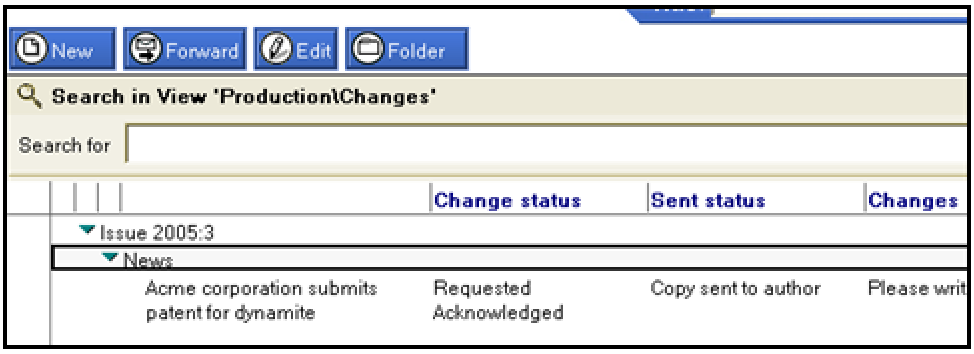


Figure 136: Changes required view showing that the Changes required has been Requested and Acknowledged.

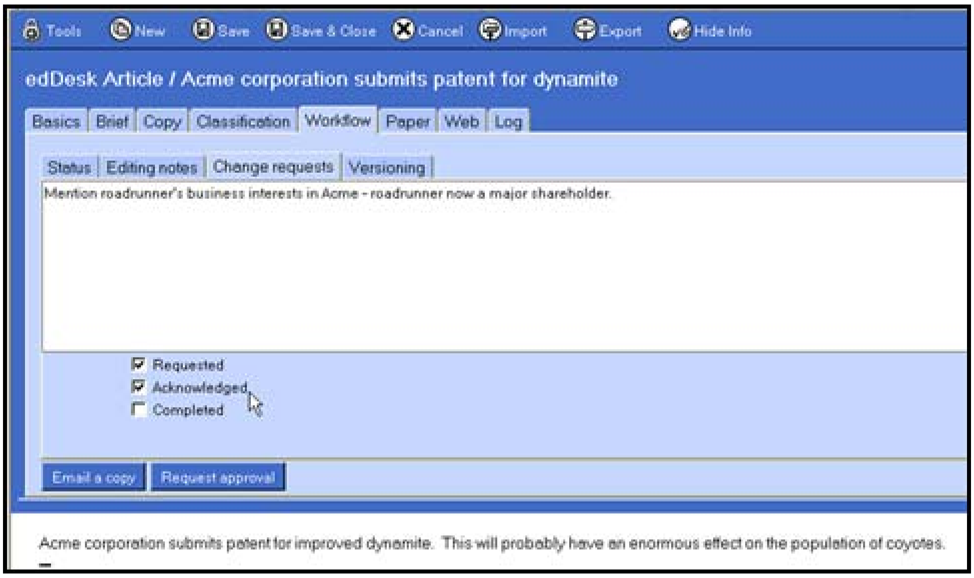


Figure 137: Change requests tab in a first level article, with Change status as Requested and Acknowledged

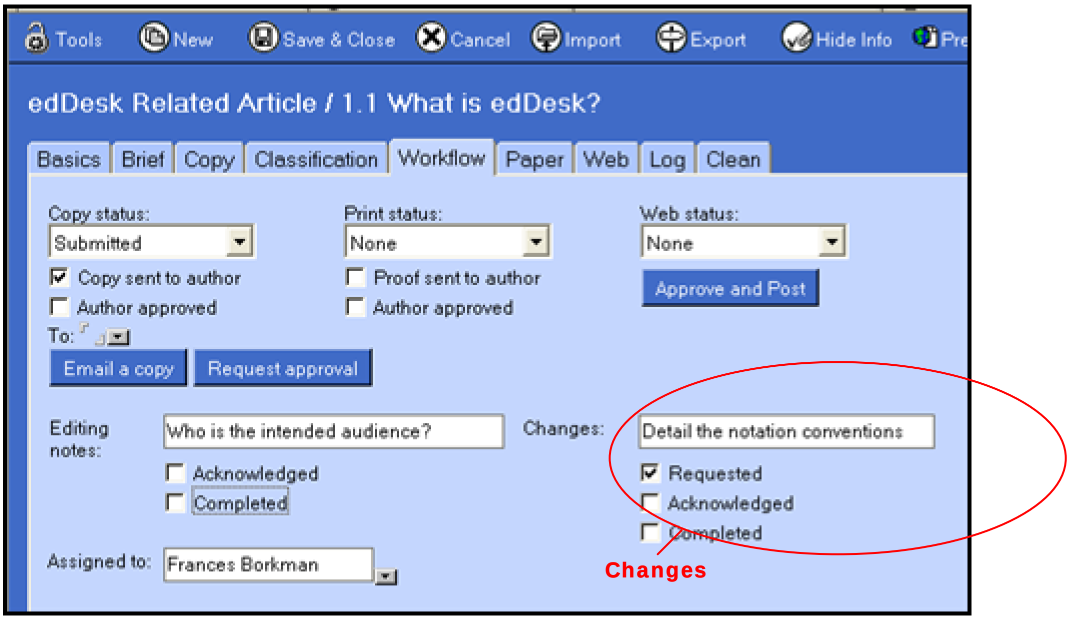


Figure 138: Changes field in a subarticle.

Editor - entering a change request

1. Go to the **`Workflow > Change requests`** tab (for a first level article) or to the **`Workflow`** tab and Changes field in a subarticle.

2. Type your request. For subarticles, this is typed in the Changes field.

3. Assigned to: Enter the email address of the person who will be making the changes – usually this will be the author.

4. Click on <*Email a copy*>. An email, containing the text of the article is sent to the author.

5. Tick the *Requested* option.

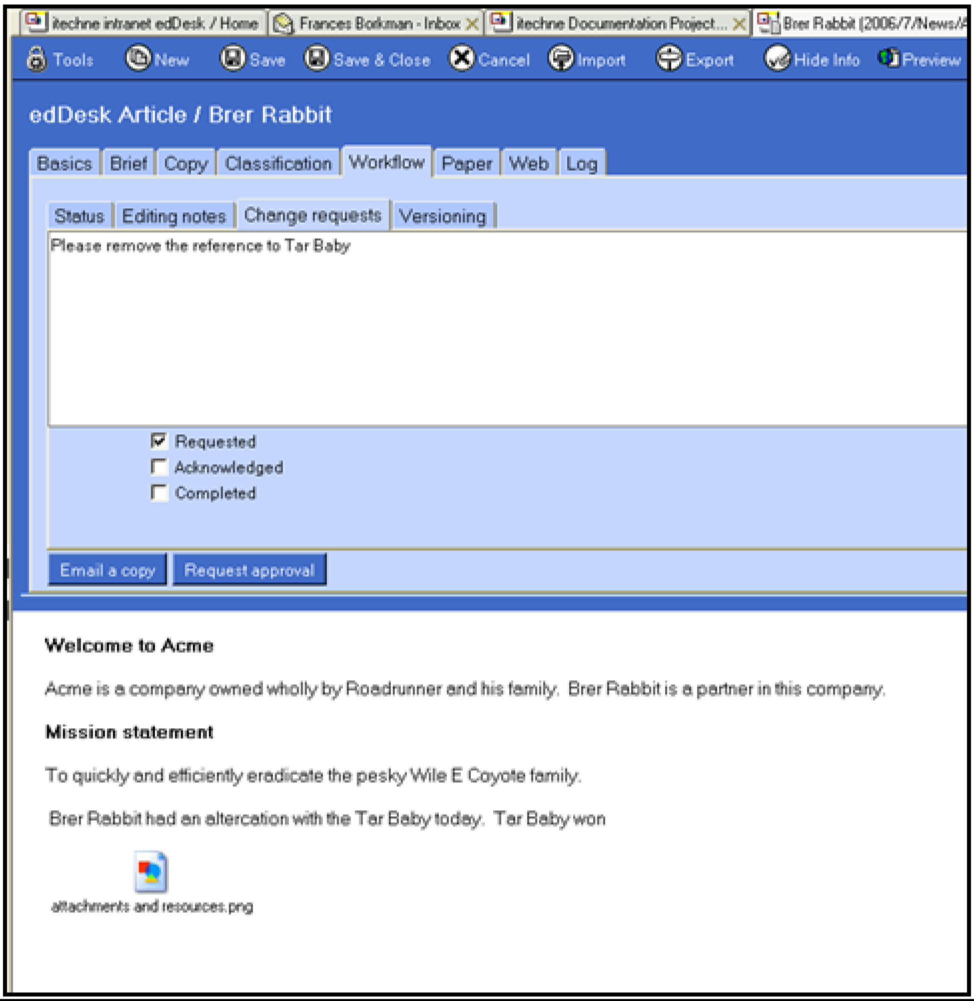
6. Save your article.

ii Author - updating a change request

1. Open edDesk and check your email. You will receive an email that contains the text of the article that needs changes.
2. Open the article, go to the **`Workflow > Change requests`** tab (or to the **`Workflow`** tab and `Changes` field in a subarticle) and note the changes that have been requested.
3. Tick the *Acknowledged* box.
4. Make the changes in the article, as requested.

Article text displayed

The article text is displayed under the **`Workflow`** tab – so you can make changes, while you still have those requested changes on the screen.



5. Tick the `Completed` box.
6. <*Save*> your changes.

Completed change requests

When a change request has been completed the request is no longer listed in the **Changes required** view.

13.6 VERSIONING

The **`Versioning`** tab lets you control what happens to previous versions of your article when it is saved. For example, you can track versions – letting you retrieve previous copies of an article and you can create new versions of the article when you need to.

The **`Versioning`** tab is only available in first level articles (article that are not children of other articles).

If you change the versioning settings for an article to allow you to save new versions of that article (and keep the old version as a reference) a new item is added to your article toolbar. This is the *Save New Version* item.

Figure 139: Article toolbar when in Edit mode. The versioning settings do not allow different versions to be saved.

Figure 140: Article toolbar when in Edit mode. Versioning settings allow different versions of the article to be saved. Note new item "Save New Version".

Important

If you are unsure of what this tab does make sure that the option *Use System Settings* is selected.

Most people will not need to use the **`Versioning`** tab.

i Versioning choices

Versioning choices are broken into two main categories – those that do not track versions and those that do. If versions are not tracked you do not have the *Save New Version* option available in your article toolbar and you cannot retrieve previous versions of your article.

When you are selecting your versioning settings you need to decide how you want the Versioning to work in your article. There are three main versioning methods:

- **Have your new version become a child article of the previous version.** Your changes are saved in the child article and the original article does not contain the changes.

  Be careful to edit the correct version. Each time you save changes another version is created. If you edit a version then save it as a new version the new version is a child of the previous version - a hierarchy of different versions of the article.

Figure 141: New versions of the article are children of the original article. If a version is edited and saved as New Version, the new version becomes a child of the previous version.

- **Have the new version promoted to be the main article and the previous version demoted to be a child.**
  Your changes are saved in the main article and the previous version becomes a child article. This is probably the easiest method to select as you just have to edit the main article – previous versions are still retained, but you don't have to remember which one to edit.
- **Have the new version and the previous version at the same hierarchical level** – both main articles.

Options that do not add Save New Version to your article toolbar

- *Use System Settings* – accepts the default settings determined by your system administrator. Use this option if you do not understand the other options.
- *Don't track versions* – Different versions of the article are not tracked. You will not be able to retrieve previous versions of the article.

Options that add the Save New Version item to your article toolbar

Child article created for new version

- *Create response if File Save As New Version is used*
  When you select *<Save New Version>* or **File >** *Save as new version* your changes are saved in a new version that is a child of the original article. The original article does not contain the changes - it stays as it was when you first went into **Edit** mode.
- *Create response automatically*
  When you select *<Save>* or *<Save & Close>* your article a new version is automatically created. The new version is a child of the original article. The original article does not contain the changes made - it stays as it was when you first went into **Edit** mode.

New version is now the parent article and the previous version is demoted to a child

- *Promote to main document if File Save As New Version is used*
  When you select *<Save New Version>* or **File >** *Save as new version* your changes are saved in the main article and the previous

version becomes a child article. You just have to edit the main article – previous versions are still retained, but you don't have to remember which one to edit.

- *Promote to main document automatically*
  When you select *<Save>* or *<Save & Close>* your changes are saved in the main article and the previous version becomes a child article. **This is the easiest method to select as you just have to edit the main article – previous versions are still retained, but you don't have to remember which one to edit.**

Both the new version and the previous version are at the same level of the article hierarchy

- *Create additional main document if File Save As New Version is used*
  When you select *<Save New Version>* or **File >** *Save as new version* your changes are saved in a new version of the main article. The new version is at the same hierarchical level as the previous version and is not indicated as a version in any way. The newest version is at the bottom of the listed articles.

- *Create additional main document automatically*
  When you select *<Save>* or *<Save & Close>* your changes are saved in a new version of the main article. The new version is at the same hierarchical level as the previous version and is not indicated as a version in any way. The newest version is at the bottom of the listed articles.

ii Setting your Versioning options

1. Open the article for which you want Versioning.

> You can only set Versioning options in articles in the top level of the hierarchy (that is, not children of any other article).

2. Go into **Edit** mode.
3. Go to the **`Workflow > Versioning`** tab.
4. Versioning: select the required versioning option.
5. *<Save>* your changes. If you have selected to *Create response automatically, promote to main document automatically* or *Create additional main document automatically* your new version is automatically created for you.
6. To display the *<Save New Version>* toolbar item you need to close your article, reopen it and go into **Edit** mode.

14. Editing homepages

Every publication that is published on the web (Internet, intranets, extranets) has its own homepage. If you have access to the **`Development`** tab, you can create new homepages and can edit existing ones.

14.1 OBJECTIVES

By the end of this chapter you should be:

- able to list your publication's homepages
- familiar with the most commonly used fields in the homepages
- able to update the **`Basics`** and **`Copy`** tabs
- aware that other tabs are tailored for each client
- able to edit the **`Module`** tab

14.2 LISTING YOUR HOMEPAGES

Homepages are available from the **`Development`** tab. If you cannot access this tab you will not be able to modify your homepages and will have to ask your system administrator to make any required changes.

1. Click on the **`Development`** tab.
2. Select **View homepages**.
3. A list of all homepages for your database displays.

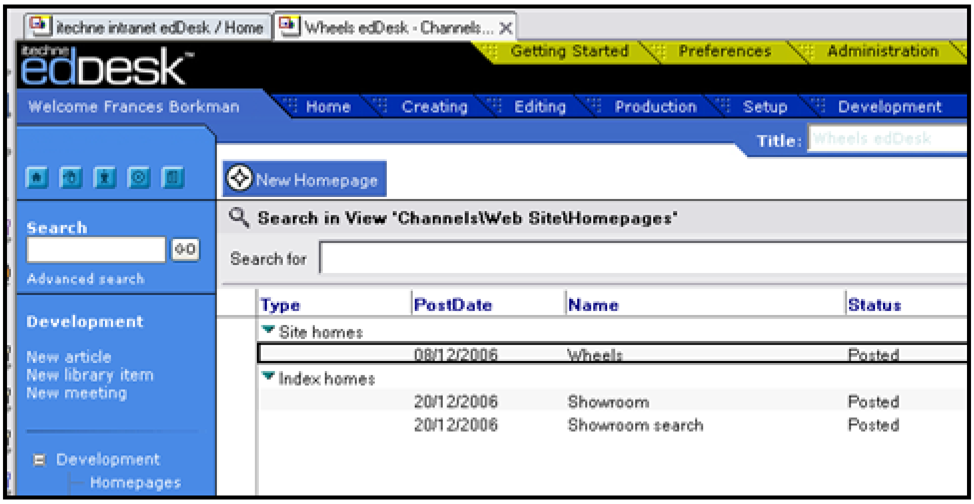


Figure 142: List of homepages for the Wheels magazine website

Information displayed is:

- Type of homepage:
  - **Site homes** – the most recent page listed here is the homepage for your entire publication's website.
  - **Index homes** – the web developer of your site determines if there are any homepages for other sections of your

publication. In the example above, there are separate homepages for the Showroom and the Showroom search sections of the Wheels publication. Index homepages tend to be used if a section has a complex display.

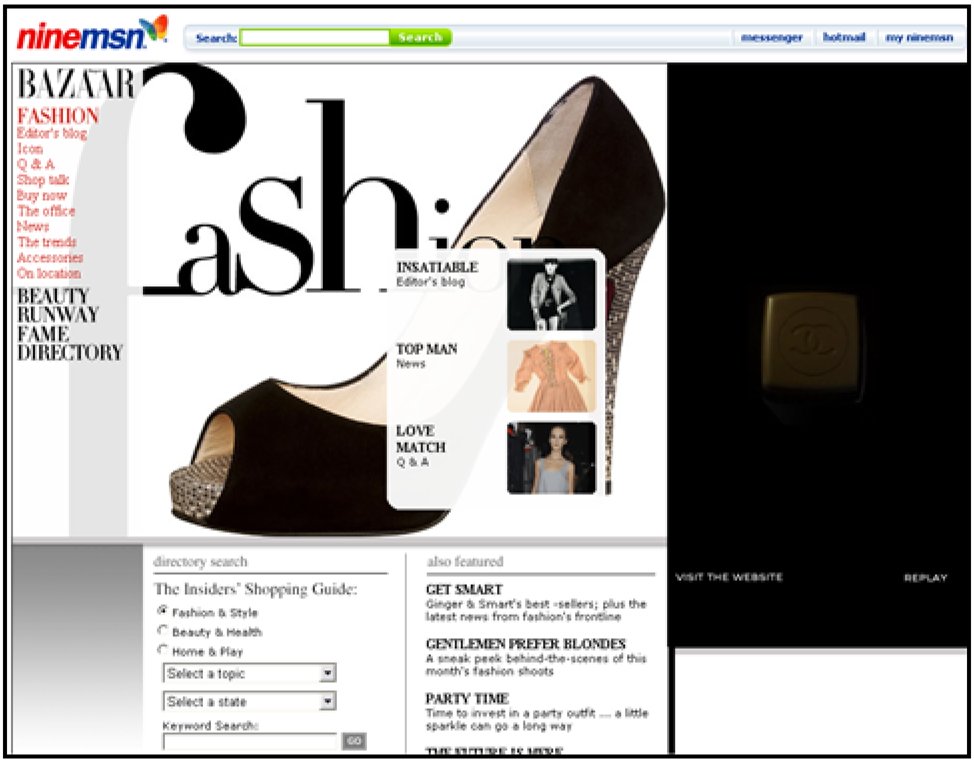


Figure 143: Index homepage used for Fashion section of Harpers Bazaar magazine website

- PostDate: when the page was published (posted) on the website.
- Name: name of the homepage. Each homepage should have a name that indicates the nature of the homepage and the part of the publication to which it belongs.
- Status: where the homepage is up to in the publishing process. Pages that have been published have a status of **Posted**.

You can have more than one site home page posted but edDesk automatically uses the one with the latest PostDate.

14.3 Preparing to Edit a Homepage

If you frequently update your homepage it is a good idea to copy the original homepage and make your changes to that copy. That way, if something goes wrong you can easily revert to the original homepage.

1. List the homepages.
2. Click once on the homepage that you want to update.
3. Copy this page. You can either select the **Edit** menu then *Copy* or use *<Ctrl> + c.*
4. Paste the page. You can either select **Edit** > *Paste* or *<Ctrl>* + *v*.

5. You now have two identical site homepages listed. The bottom one is the copy.
6. Open the copy of the homepage.

i Changing the original homepage so that it is not displayed

1. Go into **Edit** mode.
2. Change the Web Status to *None*.
3. *<Save & Close>* the page.

ii Displaying the copy of the homepage

1. Open the homepage you want to display (this is the one that has a Status of Posted).
2. Go into **Edit** mode.
3. Change the PostDate to the date that you want to start displaying this new homepage.
4. Make sure that the Web Status is *Posted*.
5. Make any other changes to the page (ⓘ see section 14.4: Editing a homepage).
6. *<Save & Close>* your new homepage.

14.4 EDITING A HOMEPAGE

This section does not discuss every field and tab within a homepage. Most tabs and fields are customised for each client. However, the concepts and major procedures are the same for each homepage.

1. Double-click on the required homepage. The homepage opens in **Preview** mode, and looks a lot like any other article. Some homepages have HTML-type code in the body.

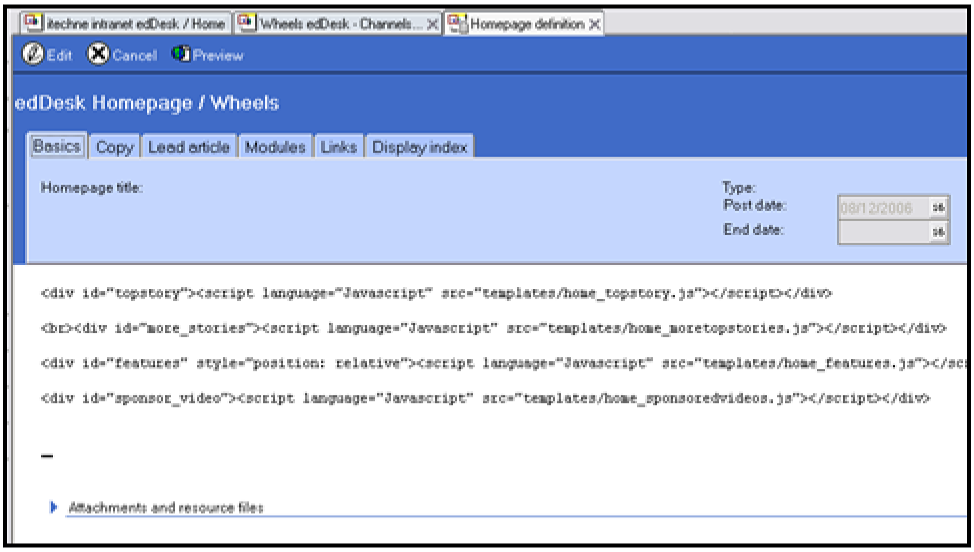


Figure 144: Homepage for Wheels magazine in Preview mode

2. Click on <*Edit*>. Your homepage is now in **Edit** mode and you will see more fields.

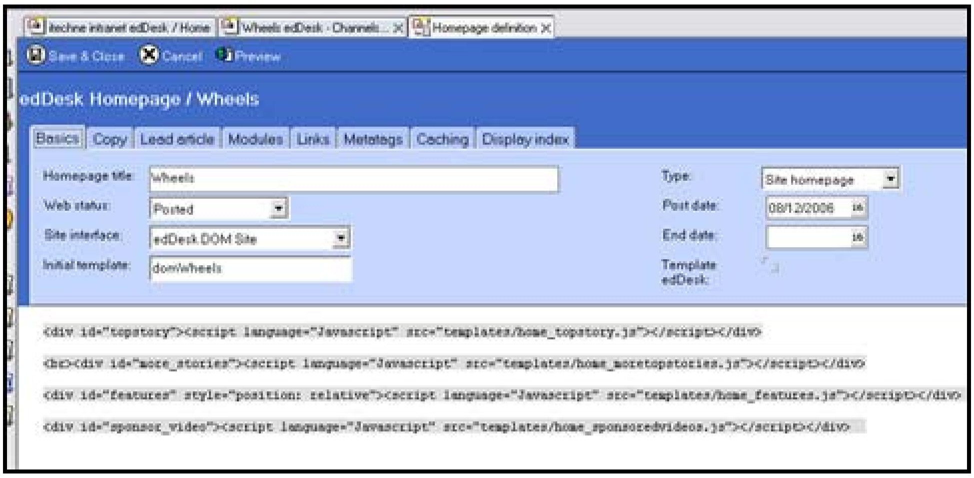


Figure 145: Homepage for Wheels magazine in Edit mode

3. The fields have been set up by itechne or your system administrator and you will not need to change most of them.
4. Make the changes as required.
5. <*Save & Close*> your homepage after you have made the required changes.
6. Go to your website. If your edited homepage was published previously, you will see the changes you have made.

i Basics tab

The **Basics** tab is displayed when you open a homepage.

There are several fields that you will not need to change, unless you are a system administrator. Fields you may change are:

- Homepage title – this only displays in **View homepages**. Similar to subject field in articles.
- Type – select from *Site homepage* or *Index homepage*. You will probably not need to change the setting.
- Web status – indicates where the homepage is up to in the publishing process. Similar to workflow in articles.
- Post date – date when the homepage is first published on the web.
- End date – date that this homepage expires (and will be replaced with another homepage). This is often left blank.

ii Copy tab

This tab is similar to the **Copy** tab in articles.

- Title – Whatever is typed here is displayed in search results and indexes, so make sure it is meaningful.

- Headline – appears as the main heading on the page.
- Intro – this is used as the first paragraph of your homepage and appears in a style determined by your template.
- Pull quote – Enter any quotes that you want to be prominently displayed in your homepage. **No template uses this field yet!**
- Summary – Enter a short summary of the homepage. This field is used in section pages, so is only relevant for index homepages.
- Bio – Enter a brief biography of the author or site. **Not used by any templates at this stage.**

iii Modules tab

Many databases and publications have tabs that you use in similar ways. This section instructs you in updating information in those tabs.

> **Customised tabs**
>
> Remember that these tabs are customised for each publication, so the titles and fields may be different, although the method of updating is the same for each tab.

The **`Modules`** tab lets you break down your homepage into different parts (or modules). You then select which items display in those modules.

1. Go to the **`Modules`** tab. The available modules are listed in collapsed format.

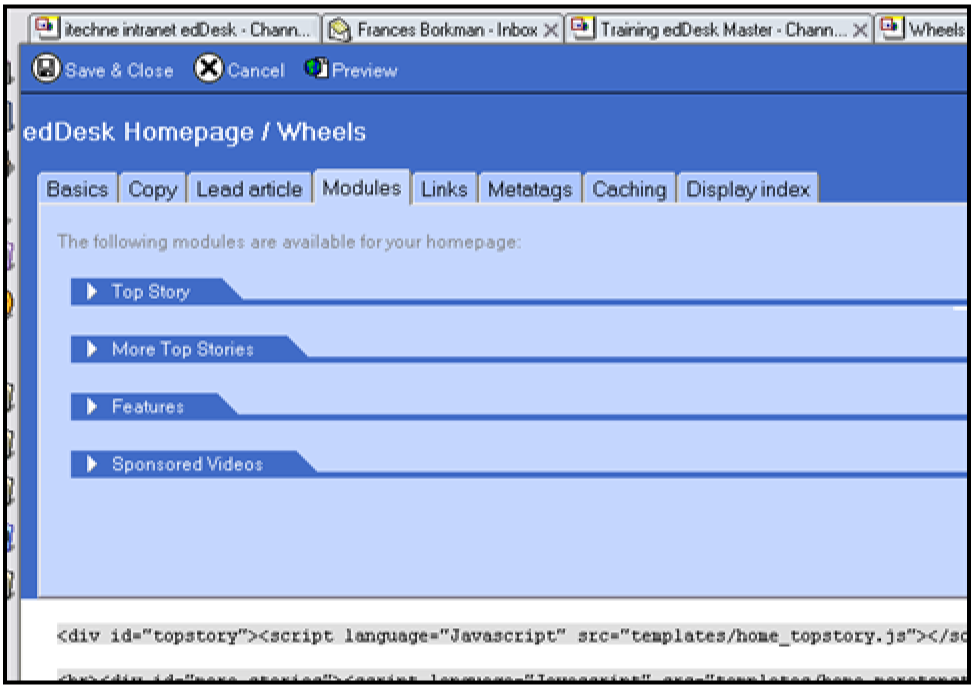


Figure 146: Modules tab listing modules in a collapsed format

2. Click on the arrow next to the module you want to edit. The module is expanded, displaying all editable fields.

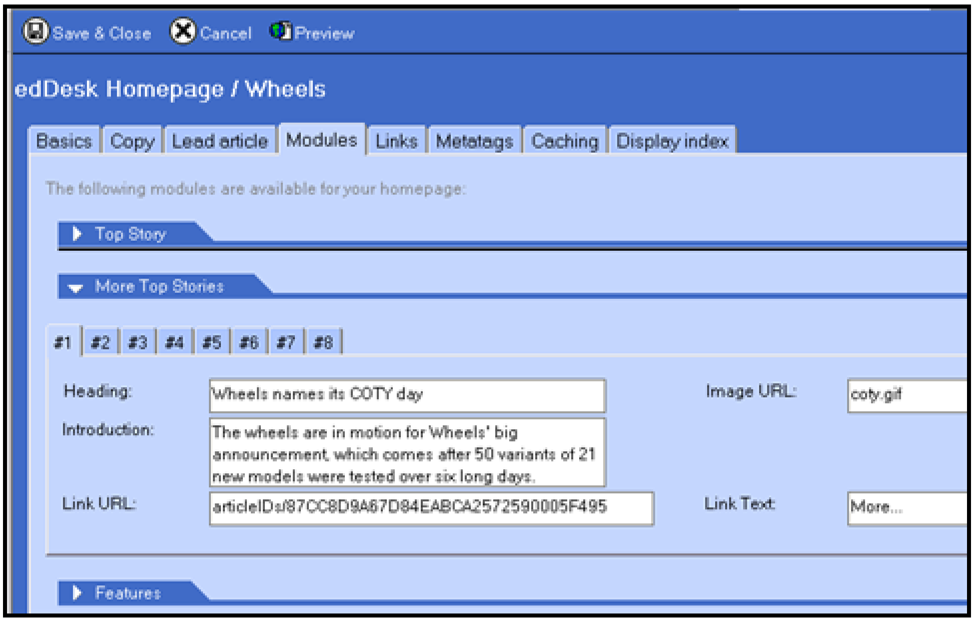


Figure 147: Expanded module "More Top Stories"

3. Numbered tabs (#1, #2 etc): Some expanded modules have several numbered tabs. The number indicates the order that the tab is displayed in on the homepage. The actual location on the page is determined by the output template (maintained by your system administrator or itechne technical staff).

   Each tab links to a separate article.

4. Heading: enter any desired text for the heading for that article. The heading is displayed on the homepage and can be different to the heading that has been entered into the article itself.

5. Introduction: Enter introductory for the article. The Introduction should capture a reader's attention and encourage them to read the complete article.

6. Link URL: This is URL of the article that will be displayed when people select to view the entire article.

   a. Open the article you want to link to.

   b. Highlight and copy the contents of the Web link field.

   c. Paste the contents into the Link URL field on the homepage.

7. Image URL: If you are putting an image on the homepage, enter the image filename.

8. Link text: This is the text that people click on to see the article in its entirety.

iv Attachments and resource files

If you are using images on your homepage you should attach them using the Attachments and resource files field.

ⓘ see section 7.8: Attachments and Resource files for instructions on using this field.

v Example of source and resulting homepage

Example of a source homepage

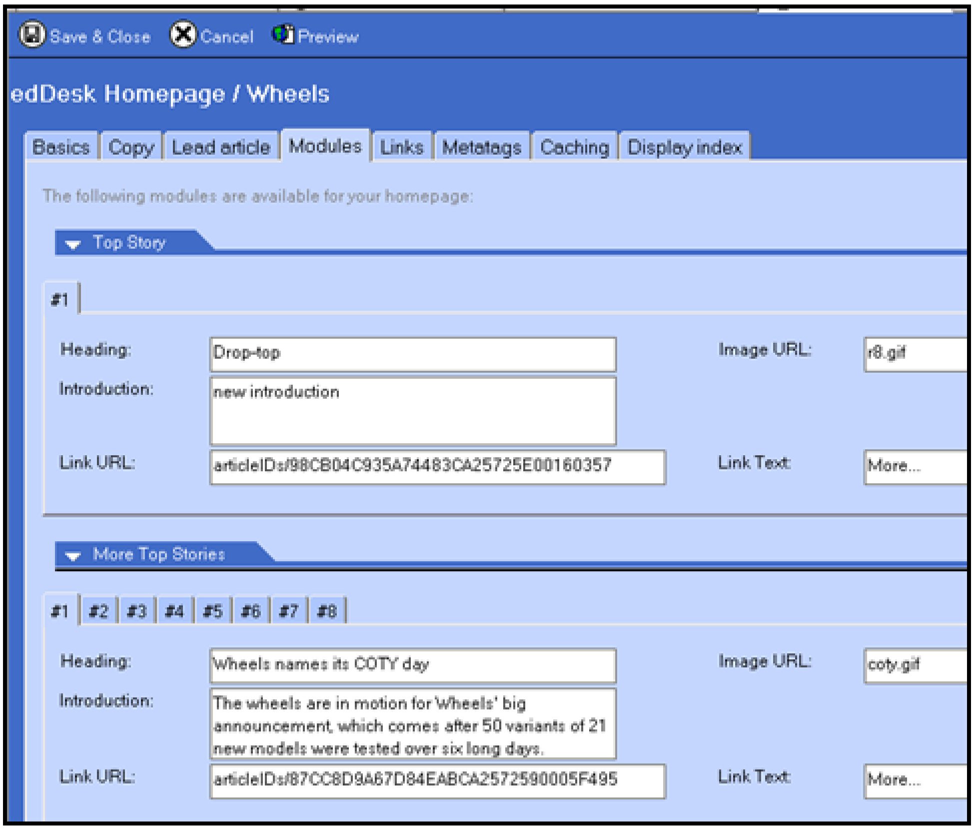


Figure 148: Source homepage for Wheels magazine site - note that the Top Story and More Top Stories fields are expanded

Web page resulting from the source homepage above

Page display

The display of the webpage (eg. Fonts, page layout) is determined by the output template, that your organisation will create with assistance from itechne.

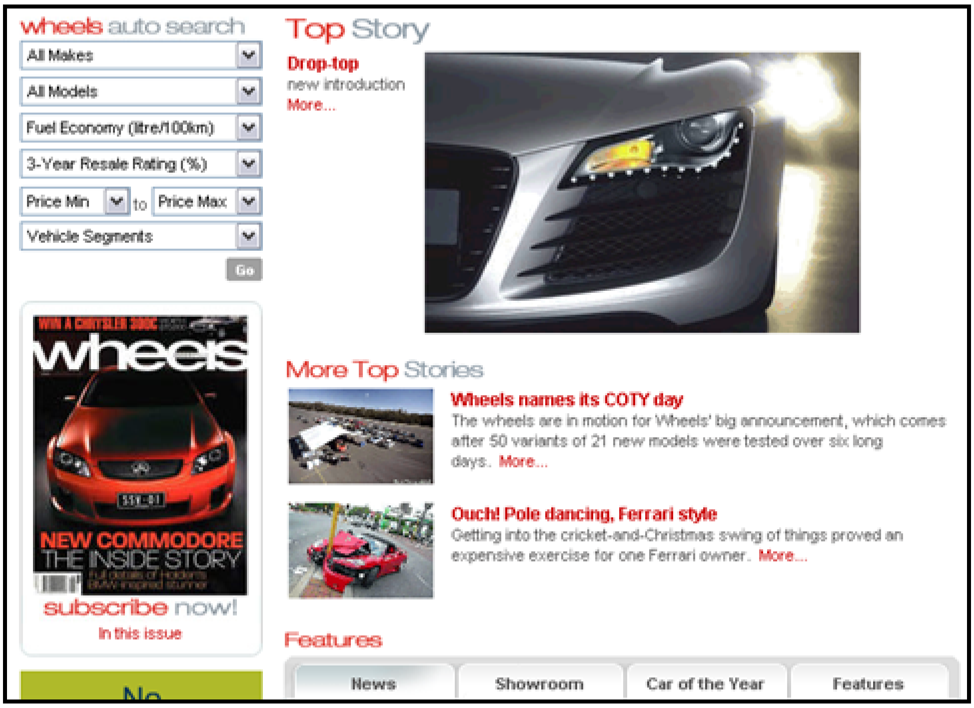


Figure 149: Homepage created from the source, (see Figure 143, above)

15. Housekeeping – cancelling articles, replication, favorite bookmarks, updating an index

This section instructs you in the fundamentals of managing your content.

> **Note:**
>
> "Favorite" is spelled the US way as this is how it appears in Lotus Notes.

15.1 OBJECTIVES

By the end of this chapter you should be able to:

- cancel an article
- replicate your databases
- see when databases have been most recently replicated
- replicate only email
- add your most commonly used databases to your Favorite bookmarks
- update index of articles.

15.2 CANCELLING AN ARTICLE

Sometimes after an article has been started it will no longer be required.

> **Cancel NOT delete**
>
> It is important to **cancel** the article, and NOT delete it, so that a record of the article remains.

Cancelling an article is done in the article's workflow. Cancelling means that there is still a record of the article having been commissioned, the author to whom it was briefed and the copy that was written. If you delete the article all information about the article is deleted.

For example, your editor has commissioned an article about sports cars. There is an overview of the cars, each author has written an article about a car and there is a separate sidebox comparing the cars discussed. It has now been decided that only the sidebox will be retained, and the separate articles are no longer required.

1. Open the article to be cancelled.
2. Go into **Edit** mode.
3. Go to the **`Workflow`** tab.
4. Click on the dropdown arrow next to Copy status:
5. Select *Cancelled*.

Figure 150: Workflow tab for an article. Change the copy status to Cancelled.

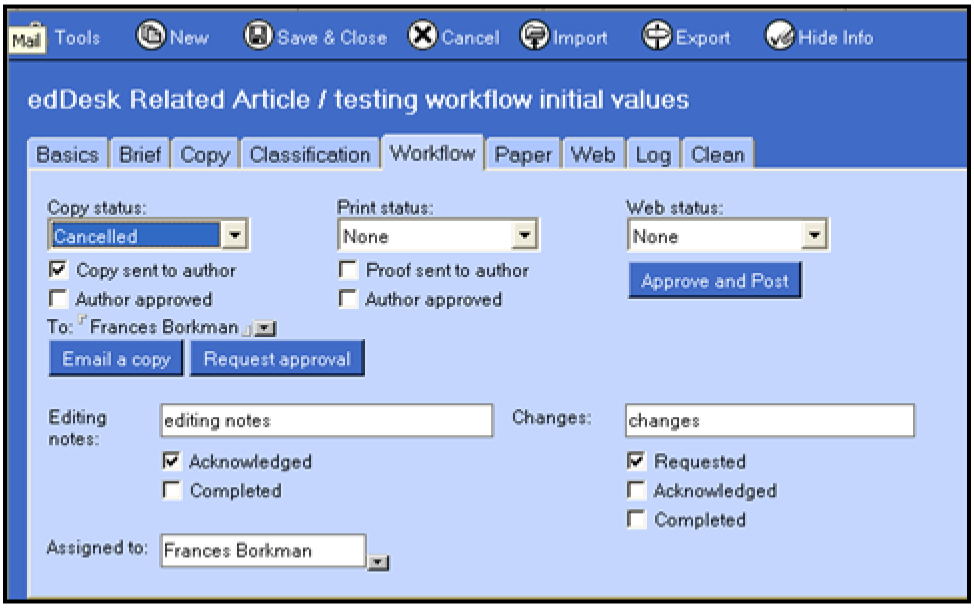


Figure 151: Workflow tab for a related article / subarticle. Change the Copy status to Cancelled.

6. Click on <*Save & Close*>.

Views now list the article with a copy status of *Cancelled*.

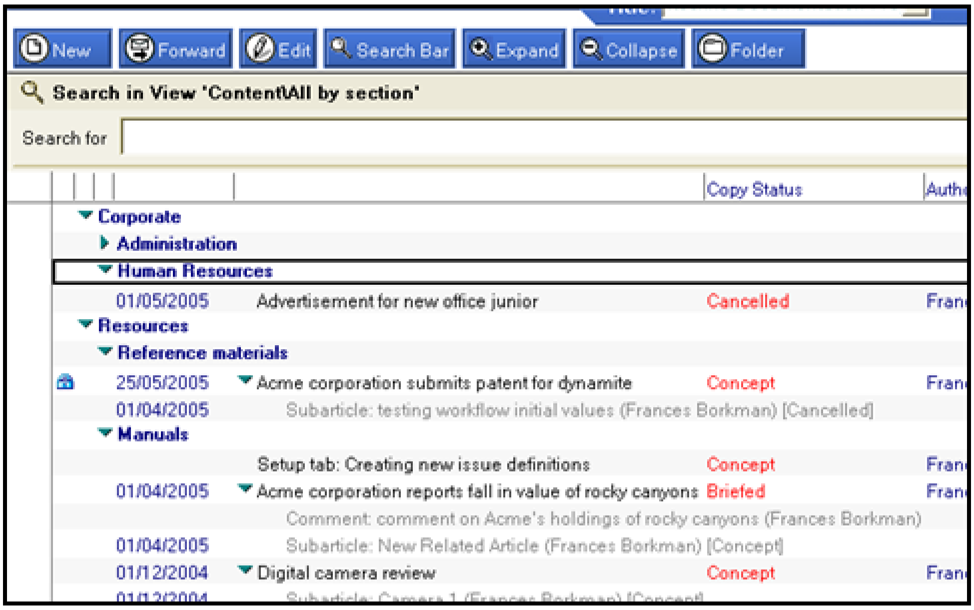


Figure 152: View All Sections showing "Copy Status" of cancelled for the cancelled article

15.3 REPLICATION

Replication is the process of synchronising two databases. It is used if you have Lotus Notes on your own computer and are not always logging directly into your organisation's computer. This is a common situation if you are working away from the office. Your local copy of Notes will be set up by your administrator to automatically replicate your databases throughout the day.

For example you often work from home and have Notes on your home computer. It is faster to use your own local version of the database to write and edit copy. (This is because your computer does not have to communicate with your work servers.) Your local Lotus Notes would be set up to replicate your databases several times a day.

Replication ensures that both you and everyone else in your organisation are working with the most current information in your databases.

Replication is done on the **Replicator page**.

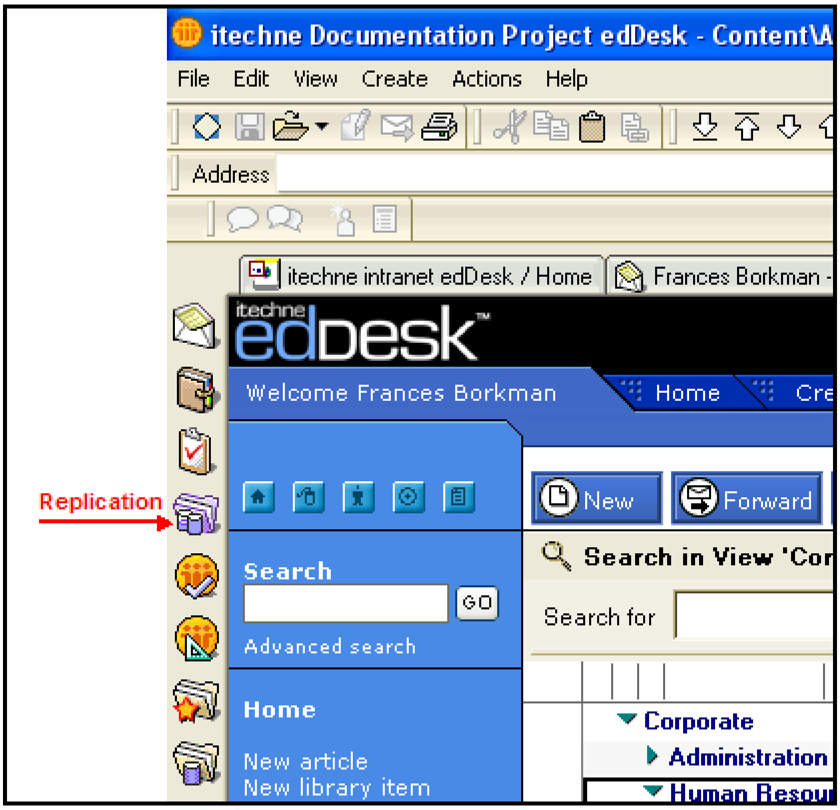


Figure 153: Replication icon highlighted in the Bookmark bar

1. Look at the bar running down the left side of your Notes screen. (Notes calls this the Bookmark bar.)

2. Click on the replication icon .

3. The **Replicator page** displays.

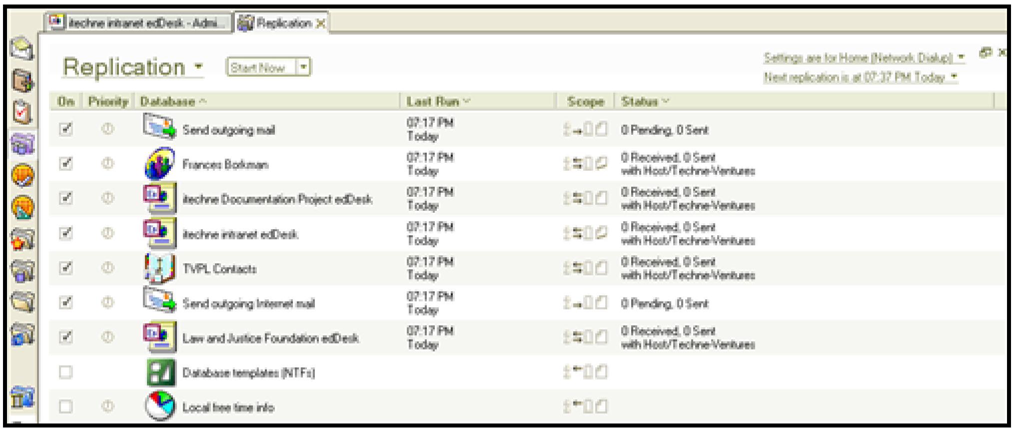


Figure 154: The Replicator page.

4. Information displayed includes:

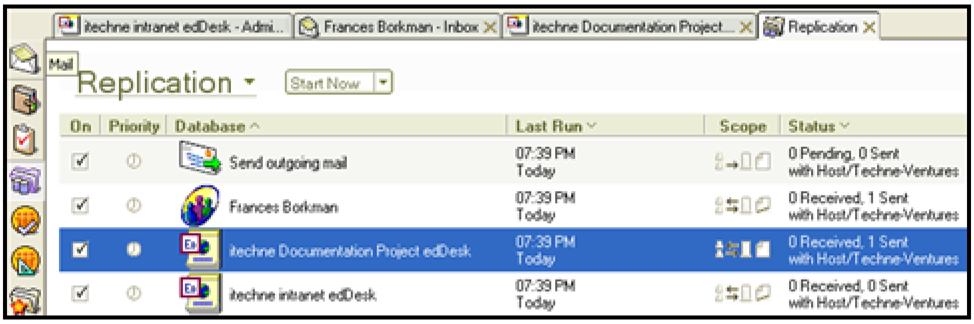
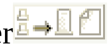
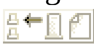


Figure 155: Closer view of the replicator page settings with the itechne Document Project edDesk database selected.

- On: whether the item listed will be replicated.
- Priority: lets you view settings for your items. There is no need for most people to look at this.
- Database: which databases are included in the replication process.
- Last Run: when the replication last occurred.
- Scope: indicates whether you are sending information to your server, receiving information  or both .
- Status: How many items have been Received and Sent and the name of the server that you are sending to and receiving from.

i Start now

Sometimes you will want to manually start a replication of all or some of your databases. This is likely if you have created or edited several articles and want to ensure that others in your organisation can see the changes you have made.

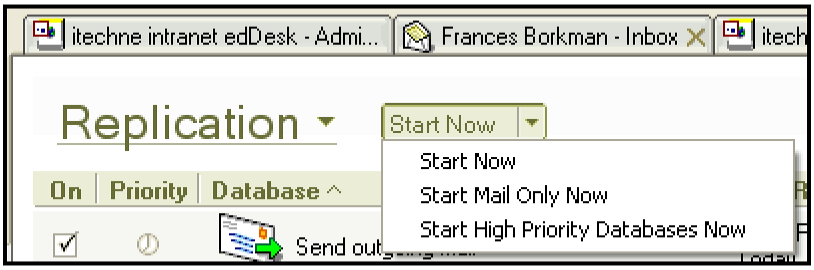


Figure 156: Replicator page using the Start Now menu to force a replication now as well as when it is normally scheduled.

Selecting a single database to replicate

1. Click on the database you want to replicate.
2. Click on **Start Now**.
3. Select *Start Now*.

Selecting to replicate mail only

1. Click on **Start Now**.
2. Select *Start Mail Only Now*.

Replicating high priority databases.

Your administrator will decide which databases are high priority.

1. Click on **Start Now**.
2. Select *Start High Priority Databases Now*.

ii When is replication set to next occur?

1. Look at the right side of the **Replicator page**.
2. The next scheduled replication time is displayed.

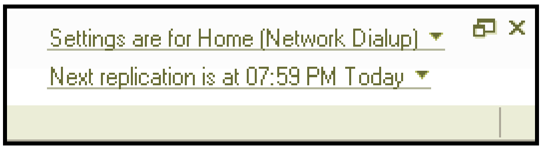


Figure 157: Top right of Replicator page showing next replication time - as set by your administrator.

15.4 USING FAVORITE BOOKMARKS

Favorite bookmarks are a way of listing and going to your most commonly used databases and pages.

i Adding items to your Favorite Bookmarks list

There are several ways of creating **Favorite Bookmarks**. Each item to be added to Favorite Bookmarks must be able to be displayed as a **`window tab`**.

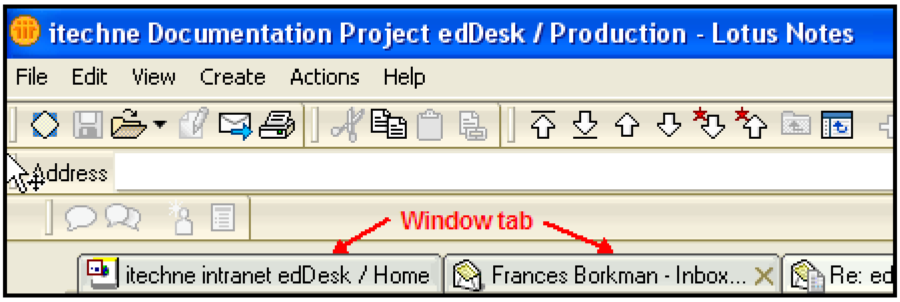


Figure 158: Window tabs. These can be added to the Favorite Bookmarks list.

Right-click on the article

1. Display the article or screen you want to add to your **Favorite Bookmarks**.
2. Right-click on the item.
3. Select *Create Bookmark*.

Drag a window to the Bookmark bar

1. Display the article or screen you want to add to your **Favorite Bookmarks**.
2. Hold down the left mouse button and drag the window tab to the Favorite Bookmarks icon . The title bar is greyed out and the mouse appears as the "no permission" sign, as in the diagram below.

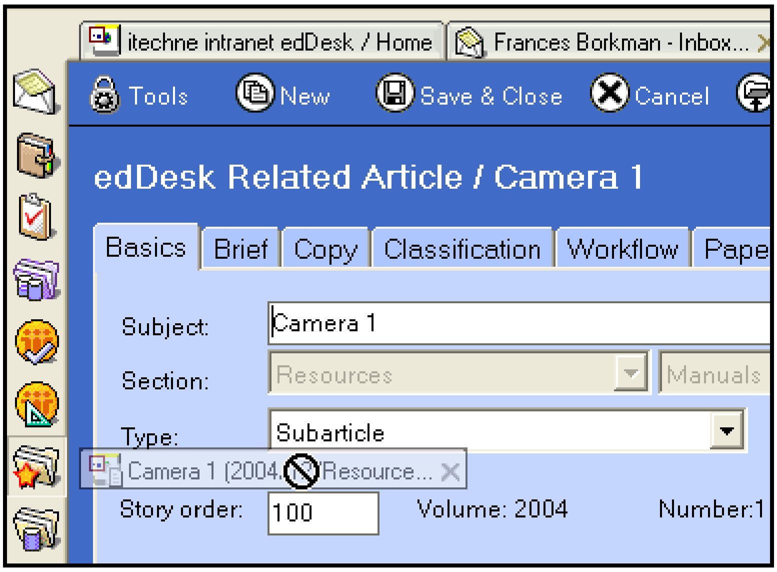


Figure 159: Dragging the titlebar with the "no permission" cursor indicating that the titlebar cannot be placed where it now is.

3. When you reach the **Favorites** icon your **Favorites list** appears.
4. Move your window tab to the position you want it to be listed at. A horizontal line shows you where it will be placed.

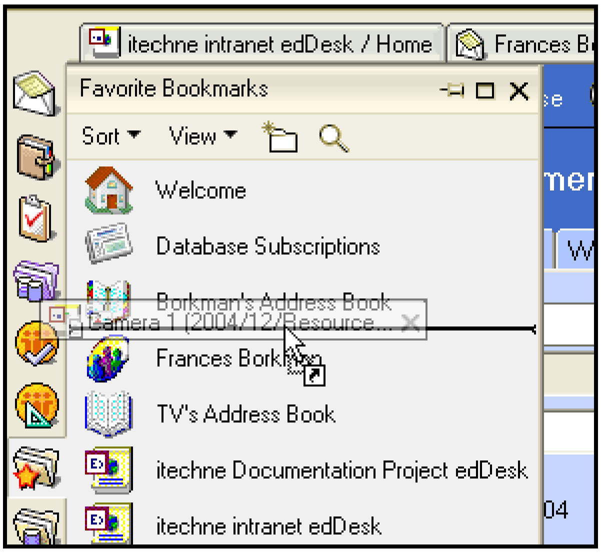


Figure 160: Titlebar and horizontal line showing where it will be placed in the Favorite Bookmarks list.

5. Release the mouse button. Your item is now in the **Favorite Bookmarks** list.

ii Creating a bookmark Folder

1. Open the **Favorite Bookmarks** list.
2. Click the **New Folder** icon at the top of the Favorite Bookmarks list.

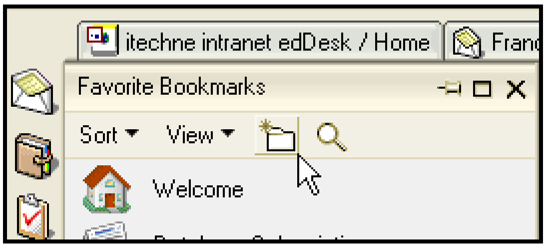


Figure 161: Mouse pointing to New Folder icon.

3. Folder name: Type a name for your new folder.
4. Click on the **Folder** that you want to put your new folder in.

Figure 162: New folder called "News items" to be put into the Favorite Bookmarks folder.

5. Click on <*OK*>.

iii Removing an item from the Favorite Bookmarks list

1. Right click on the item to be removed.
2. Select *Remove Bookmark* or *Remove Folder*.

Note

When you Remove Folder you also remove all bookmarks in that folder.

15.5 Updating an Index

Search engines use indexes to help articles be quickly located and listed on your screen. edDesk uses **full text indexes** because they allow more accurate searching of the articles in your databases.

If you work on your organisation's server (on a network) the indexes are up-to-date. If you work on your own local version of Lotus Notes, indexing is done as a "background task" whenever your computer is not too busy – if it's always busy the indexing may not be done as frequently as you need.

If you have database permission you can manually update indexes.

i Does my database use a full-text index?

To see if your database uses a full-text index do the following:

1. Go to a View that displays the Search bar. (**All Issues** and **Sections** views display the search bar).

Figure 163: Search bar. This example is from the "All Issues" view, but other views also have the Search bar.

2. Look at the top right of the **Search bar**. You see the word Indexed with either:
   i. a green circle – full text indexed
   ii. a brown circle – not full text indexed.

ii When was my index last updated?

1. Go to a view that displays the **Search bar**.
2. Click on <*More*>.
3. Your **Search bar** is expanded. The right side of the search bar is below:

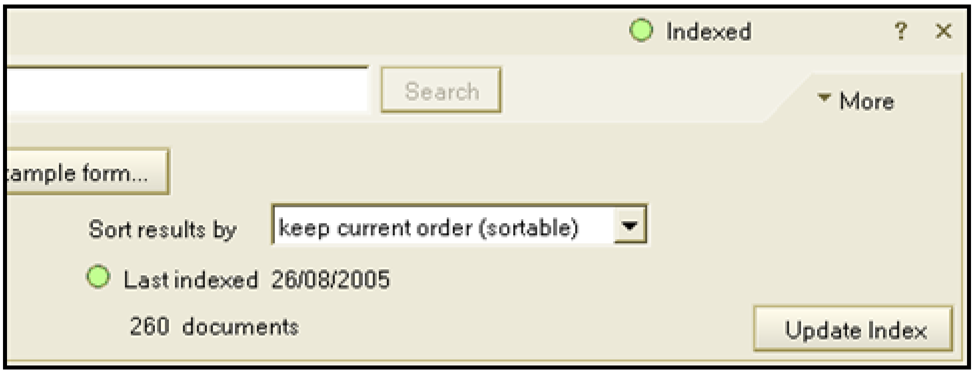


Figure 164: Search bar with indexing details shown.

4. You can see the date your database was last indexed and how many documents were included in your index.

iii Updating an index

If you notice that the index has not been updated recently and you know that there have been several changes made to the articles in the database you can update the index.

The diagram above shows the database was last indexed on 26/08/2005. The screen capture was taken on 30/08/2005. Therefore the index has not been updated for four days – this database is also a training database, not a “real live” database, and does not have many articles added or edited.

To update the index:

1. Go to a view that displays the Search bar.
2. Click on <*More*>.
3. Your Search bar is expanded.
4. Click on <*Update Index*>.

16. Webifying your article – getting ready to publish on the web

If your article is to be published on the web (including intranets) it must be "webified". Many of the steps involved in webifying an article are explained in detail in other chapters of this user guide. These other chapters are referred to in each webifying section.

16.1 OBJECTIVES

By the end of this chapter you will be familiar with the steps needed to webify your article to ensure that it is in a format able to be published on the web.

16.2 STEPS INVOLVED IN WEBIFYING AN ARTICLE

i Paste images into the body of the article

Images must be put in the body of the article in the position that you want them to appear in the published version of your article.

Pictures that have been added to your article using the **Paper** tab,

<Attach Pictures> or the Attachments and resource files field will not appear in the article unless they are pasted into the body of the article.

ⓘ see Chapter 9: Including documents and images in articles.

ii Classifying your article

Check that the classifications that have been applied to your article are still relevant.

ⓘ see section 11.3: Classification tab for information on adding and updating classification details.

iii Add links to external sites – if needed

If your article refers to other organisation's websites and you want your readers to be able to quickly go to those other sites, you need to create links to those sites. Links are created by adding **Hotspot links**.

ⓘ see section 8.9: Creating link (text) hotspots – Linking to other articles and external sites and section 9.9: Image hotspots.

iv Replace internal page references with hotspot links - if needed

This is mostly relevant when you are converting large articles, or written reports, into several smaller articles and subarticles. Links are created by adding **Hotspot links**.

ⓘ see section 8.9: Creating link (text) hotspots – Linking to other articles and external sites and see section 9.9: Image hotspots.

17. Printing edDesk content

edDesk allows you to print views and individual articles. You can select various print formats and inclusions. Printing views is often used for printing details of articles for a particular issue of a publication.

17.1 Objectives

By the end of this chapter you should be able to:

- change the most commonly used print settings to ensure that your printout is formatted as required
- print an edDesk article
- print the list of articles returned by non-expandable views
- print the list of articles returned by expandable views
- print a list of some of the articles in expandable views.

17.2 Printing edDesk articles

You can print articles from different places in edDesk. These are:

- when the article is in **Edit** mode
- when the article is in **Preview** mode
- when you are in a view, and the required article is selected (clicking once on the article will select it without opening it).

The **Print Document** dialogue box displays when you print from an article, or from a view where you have not selected any articles.

The **Print View** dialogue box displays when you print from a view where you have selected at least one article.

i Printing from an open article

1. Press *<Ctrl>+p* OR select the **File** menu then *Print*.
2. The **Print Document** dialogue box opens. This lets you set the printing options. The options you see depend on the type of printer you have.

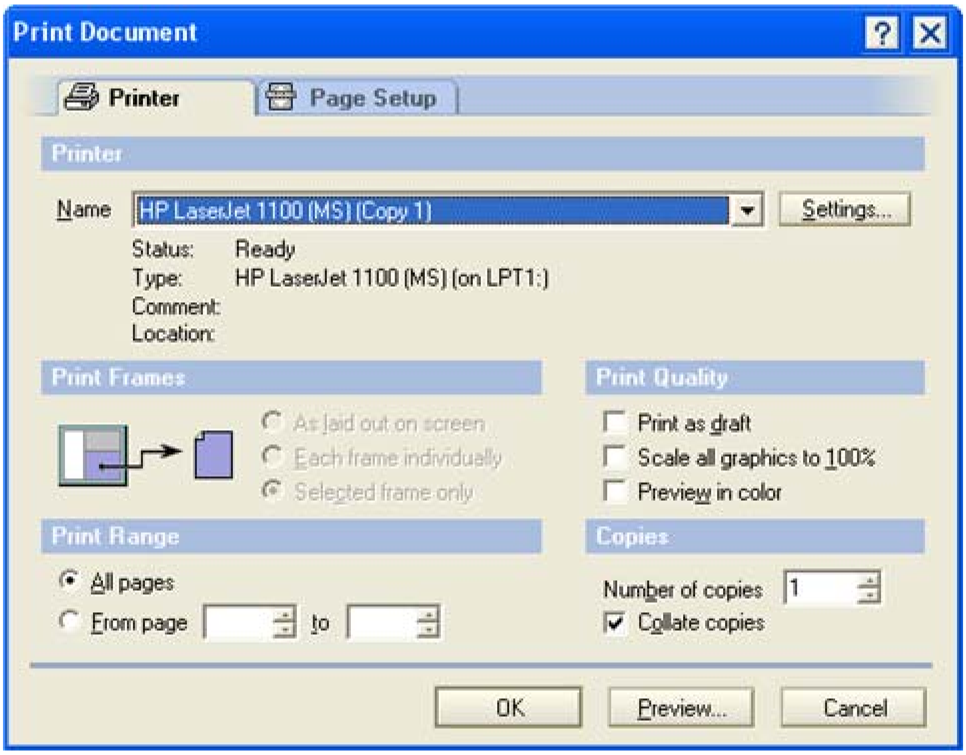


Figure 165: Print document dialogue box as displayed from an article

> **Print Frames**
>
> This option is only available when printing from a view. It is greyed out if you are printing from an article.

3. Set your printing options as required.
4. Click on *<Preview…>* to check how your article will look when it is printed. A **Print Preview** opens. Make sure that your article will print as you need.

   Click on *<Done>* to close the **Print Preview**. The **Print Document** dialogue box displays.
5. Repeat steps 3 and 4 until you are satisfied with the print settings.
6. Click on *<OK>*. Your article is printed.

ii Printing from a view where you have selected an article

1. Go to the view that lists the required article.
2. Click once on the article you want to print.
3. Press <*Ctrl*>+*p*. The **Print View** dialogue box opens.

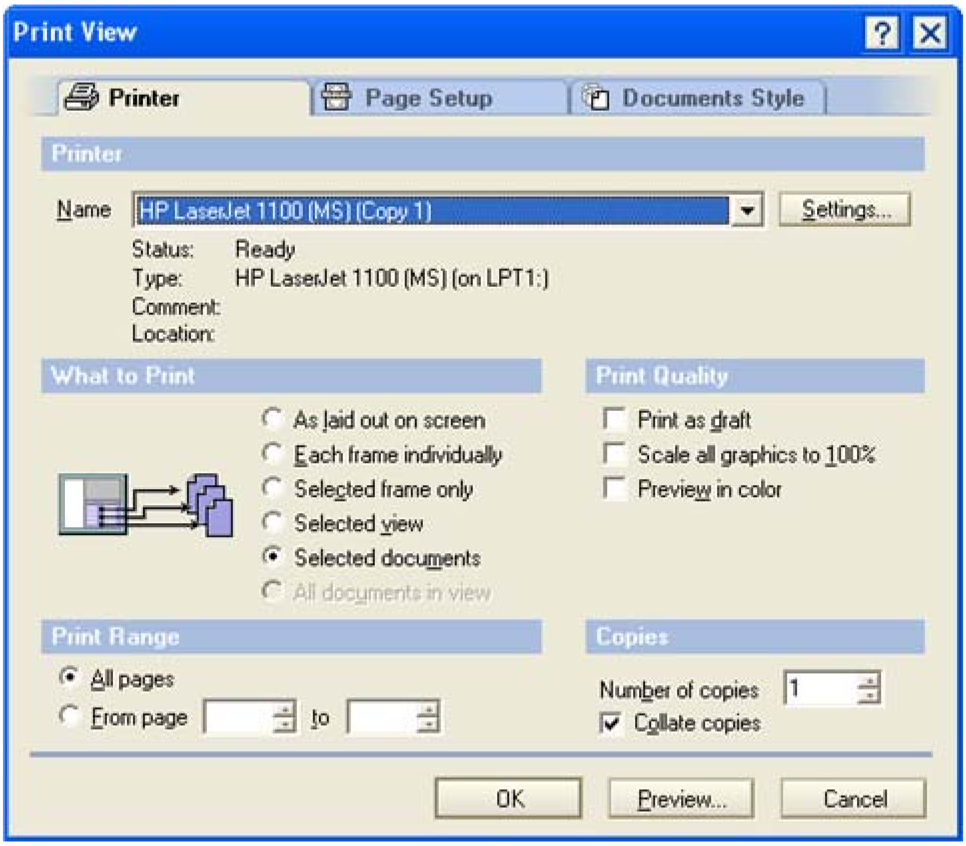


Figure 166: Print View dialogue box with default settings selected

4. Set your printing options as required.

   ⓘ see <u>section 17.4: Printing options</u> for more information.

5. Click on <*Preview…*> to check how your article will look when it is printed. A **Print Preview** opens. Make sure that your article will print as you need.

   Click on <*Done*> to close the **Print Preview**. The **Print Document** dialogue box displays.

6. Repeat steps 4 and 5 until you are satisfied with the print settings.
7. Click on <*OK*>. The article is printed.

iii Printing several articles from a view

Expandable views let you select several articles for printing. Non-expandable views only let you select one article at a time.

Expandable views have a toolbar along the top of the view.

ⓘ see <u>section 4.4ii: Expanding and collapsing your results</u> for more information on expandable views.

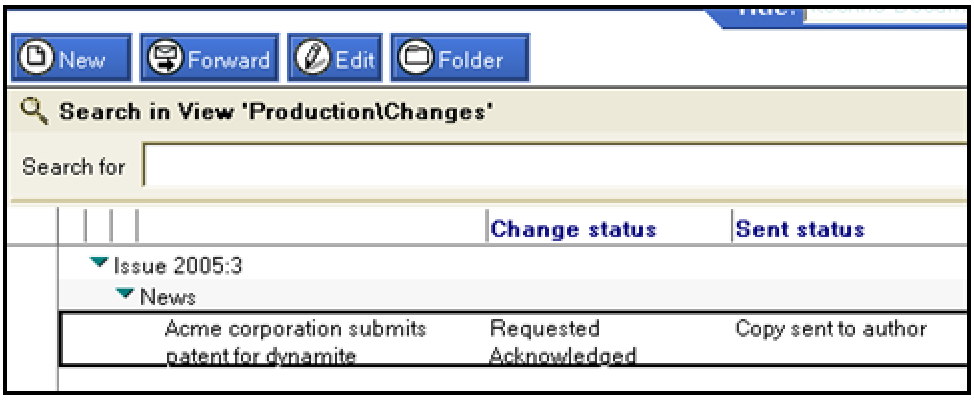


Figure 167: Expandable view. This type of view lets you select several articles to print.

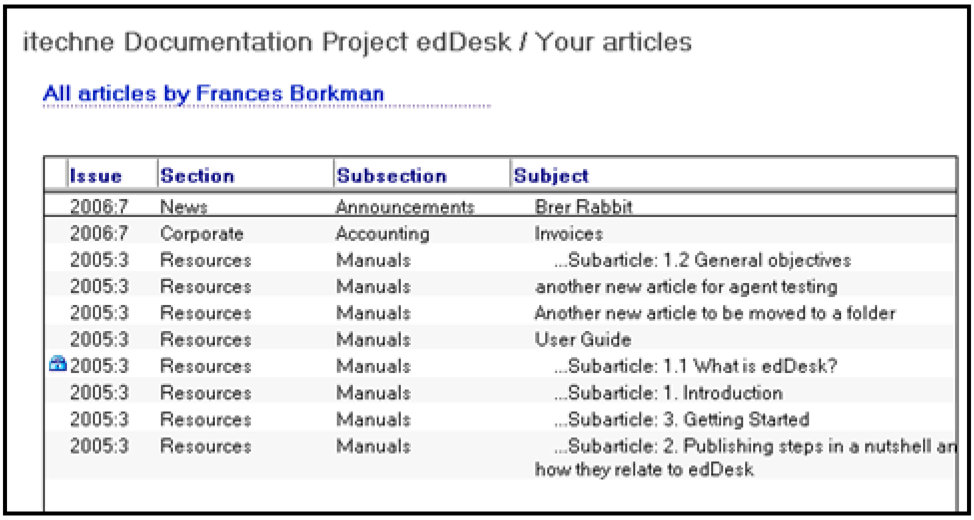


Figure 168: Non-expandable view. This type of view lets you select only one article at a time to print.

1. Go to the required view (it must be an expandable view).
2. Click once to the left of each article you want to print. A tick appears next to that article.

Figure 169: Selected articles are indicated with a tick.

3. Select the **File** menu then *Print* OR press *<Ctrl>+p*. The **Print View** dialogue box displays.

4. What to Print. Click on *Selected documents*.

5. Click on *<OK>* to print, or *<Preview…>* to see how your articles will print.

17.3 PRINTING VIEWS

Views are often printed and used as summaries of how articles are progressing in relation to publishing an issue of a publication.

Expandable views allow you to print part of the view. Non-expandable views print the entire list of articles returned by the view.

i Printing non-expandable views

1. Go to the view you want to print.

2. Click once on any article listed in the view. (This ensures that the **Print View** dialogue box displays when you select Print.)

3. Select the **File** menu than *Print* OR press *<Ctrl>+p*. The **Print View** dialogue box displays.

4. What to print: Click on *Selected view*.

5. Click on the **`Page Setup`** tab.

6. Orientation: select *Landscape*.
7. Click <*OK*> to print.

ii Printing the entire list of articles in an expandable view

1. Go to the view you want to print.
2. Click on <*Expand*>. The view expands, to list all articles matching the view criteria.
3. Select the **File** menu than *Print* OR press <*Ctrl*>+*p*. The **Print View** dialogue box displays.
4. What to print: Click on *Selected view*.
5. Click on the **`Page Setup`** tab.
6. Orientation: select *Landscape*.
7. Click <*OK*> to print.

iii Printing part of the list of articles in an expandable view

1. Go to the view you want to print.
2. Click on <*Collapse*>. The view collapses.
3. Drill down through the categories in the view until you have listed all required articles. For example, in the Production Directions view you may wish to print only articles for the coming two issues of a publication – Volume 2006, Issue 8 and Issue 9. You would need to drill through each of these categories until all relevant articles are listed.
4. Select the **File** menu than *Print* OR press <*Ctrl*>+*p*. The **Print View** dialogue box displays.
5. What to print: Click on *Selected view*.
6. Click on the **`Page Setup`** tab.
7. Orientation: select *Landscape*.
8. Click <*OK*> to print.

17.4 PRINTING OPTIONS

Only the most common printing options are discussed in this User Guide. If you are curious about some of the other options then select the options and click on <*Preview…*> to see the results of those settings.

Most of the settings are in the **`Printer`** tab of the **Print Document** and **Print View** dialogue boxes.

i Printer tab

Most of the options in this tab are for when you have selected to print a view, not an individual article.

What to Print / Print Frames

When you are in a view that has a toolbar your options are in the field `What to Print`. When you are in a view that has NO toolbar your options are in the field `Print Frames`.

- *As laid out on screen* – your view prints as it is displayed on the screen. Screen items such as the navigation pane and tab bar print.
- *Each frame individually* – NOT GENERALLY USED. Each frame of the screen prints on a separate page. If you select this option use <*Preview…*> to see how your printouts will look before you print!
- *Selected frame only* – Only the frame that your cursor is in will print. Usually this is the body of the page (and this is where you want it to be!). USEFUL.
- *Selected view* – Prints the view that you are in. This option is not listed in the **Print Document** dialogue box. VERY USEFUL.
- *Selected documents* – Prints the article(s) that you have selected. If you select this option the **Print View** dialogue box displays the **`Documents Style`** tab that lets you control how the selected articles are printed. This option is not listed in the **Print Document** dialogue box. VERY USEFUL.

Print Range

- *All pages* – select this option to print all pages in an article or view.
- *From page… to* – if you only want to print some pages, enter the numbers in the `From page` and `To` fields. You will probably need to go to <Preview…> to determine which pages to print (as they are not numbered in the article or in the view). This option is not widely used in edDesk.

Print Quality

- *Print as draft* – prints quickly, but at lower quality. (Good way to save printer ink).

- *Scale all graphics to 100%* - Select this option to print your images at their **original** size. If you have imported an image into your article, then resized the image your resizing is ignored when this option is selected.
- *Preview in colour* – select this to do a print preview in colour – as you see the article or view on screen. If you do not select this, your preview will be in black and white.

Copies

- *Number of copies* – enter the numbers of printouts you want.

> **Note**
>
> It is cheaper to use a photocopier than a printer for extra copies.

- *Collate* – Only relevant if you want more than one copy. This option is selected by default. This option keeps each copy together. If you deselect this option, you will get all page 1 together, all page 2 together so on.

ii Page setup tab

This is mainly used to set your paper size, page margins and page orientation.

You will probably only use this to change the paper orientation from portrait (default) to landscape. This is useful when you are printing a view, so that your printout is not truncated.

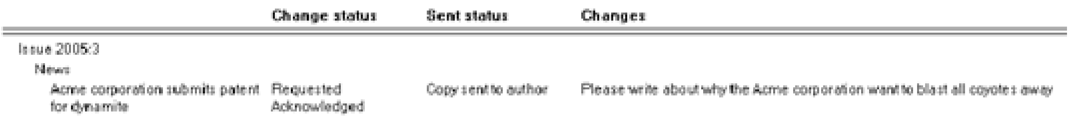


Figure 170: View with page set to landscape so that the text is not truncated.

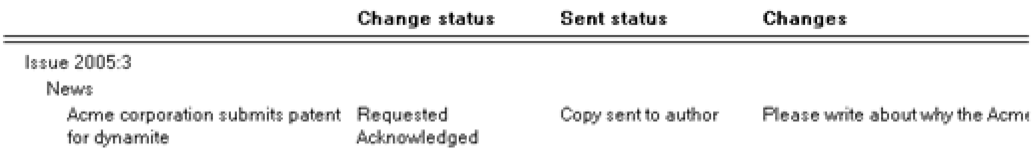


Figure 171: Same view with page set to portrait. See that the text is truncated.

iii Document styles tab

This tab only displays when you have chosen *Selected documents* in the `Print Frames` field of the **`Printer`** tab of the **Print View** dialogue box.

How To Print Each Document

- *Print each document on a new page* – prints each article on a separate page.
- *Print each document as a separate print job* – Each article is printed separately. This is a good idea if you are printing a lot of

articles and are sharing a printer with other people (their jobs can go between your printing articles and they don't have to wait as long for their printouts).

- *Print each document continuously with a blank line between each document* – adds a blank line between articles, but does not put articles on separate pages.
- *Print continuously with no blank lines between documents* – the only indication that you are printing separate articles is the header information that is printed at the top of each article.

Format Each Document Using

You will not need to change anything in this field.

Page Numbering

These options are only available if you have selected *Print each document on a new page* in the How To Print Each Document field.

- *Reset page number to 1 for each document* – each document will start with its first page numbered as 1.
- *Page range applies to each document* – page numbers are incremented. Only the first page of the first article will be numbered as page 1.

18. Folders

Folders help you organise your content so that it is highly accessible for you.

Folders are different to views in that each article in a folder must be placed there manually. Views use a formula to display articles, and the list of articles is automatically updated as articles are added to and deleted from your database.

Folders are a useful tool if you are working on a large project and have several articles in progress. Instead of having to locate the articles in a view you can add just those articles to your folders.

Folders can be **shared** with other people in your organisation, or **private**, for your use only. You can create folders within folders – just like creating new folders in MS Windows.

18.1 Objectives

By the end of this chapter you should be able to:

- create folders to organise your articles
- create subfolders to organise your articles
- use folders to access your articles
- move articles to other folders
- rename folders
- remove folders when they are no longer required.

18.2 Creating Folders

1. Go to your **Home** page.
2. Look at the navigation pane. There is a *Folder* item.

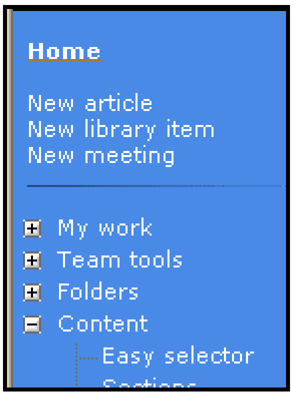


Figure 172: Folder item available in the navigation pane from the Home screen.

3. Click on the plus next to *Folders*. The list of folders expands.
4. Right click on *Folders*. A popup menu displays.
5. Click on *New Folder…*
6. The **Create Folder** dialogue box displays listing your current folders.

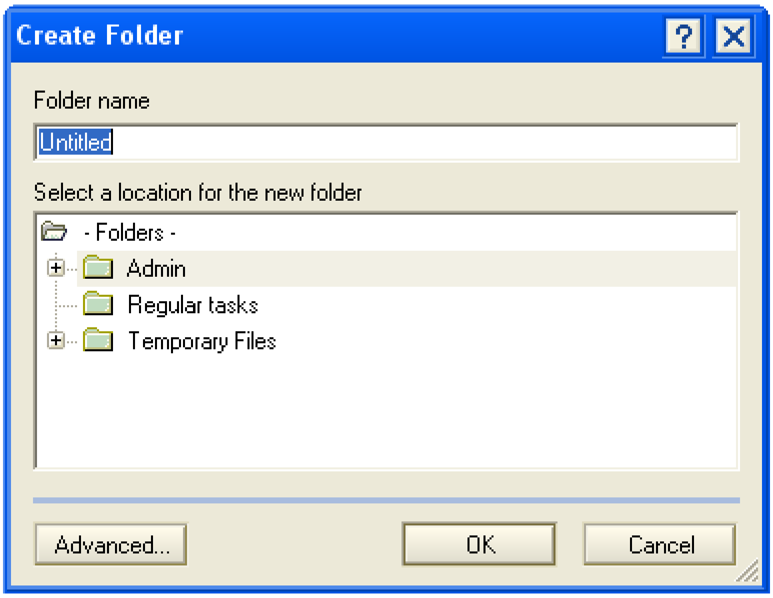


Figure 173: Create Folder dialogue box with current folders listed.

7. **Folder name**: Type the name for your new folder. The dialogue box displays with "Untitled" as the name for your folder. Overtype this name with the required folder name.

8. **Select a location for the new folder**: Navigate through your current folders until you have selected the one that will be the parent of the new folder. That is, select (by clicking once) the folder that your new folder will be put in.

9. Click on <*OK*>.

10. Your new folder is now listed in the navigation pane.

18.3 PUTTING ARTICLES IN YOUR FOLDERS

After you have created your folders you need to put the required articles into them.

1. Expand the folder list by clicking on the plus signs next to the folder names until you have your folder listed.

2. Go to a view and find the article you want to put in your folder. Use any view that will list the required article(s).

3. Click once on the required article.

4. Drag the article to your folder. Dragging is done by holding down the left mouse button while you move the mouse to your folder. A "No permission" cursor is shown until the article is dragged to a folder where you have permission to put the article.

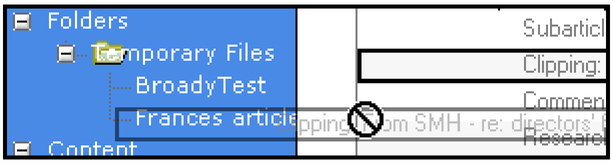


Figure 174: Article being dragged has "no permission" cursor meaning that it is not able to be dropped into its new folder yet.

5. When the article is at a folder you can use the "No permission" cursor changes to a pointer.

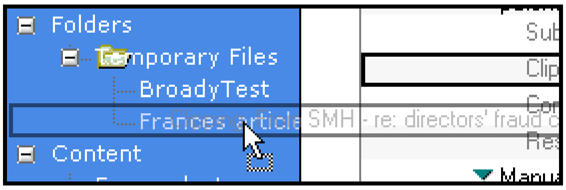


Figure 175: Permission to drop article into folder.

6. Drop your article into the folder. Dropping is done by releasing the left mouse button.

7. Repeat steps 2 to 6 for each article you want to put in your folder.

i Quick way of copying several articles to your folder

1. Expand the folder list by clicking on the plus signs next to the folder names until you have your folder listed.

2. Go to a view and find the article you want to put in your folder. Use any view that will list the required article(s).

3. Click at the far left of an article to be put in your folder. A tick appears next to the article. Do this for each article to be put in your folder.

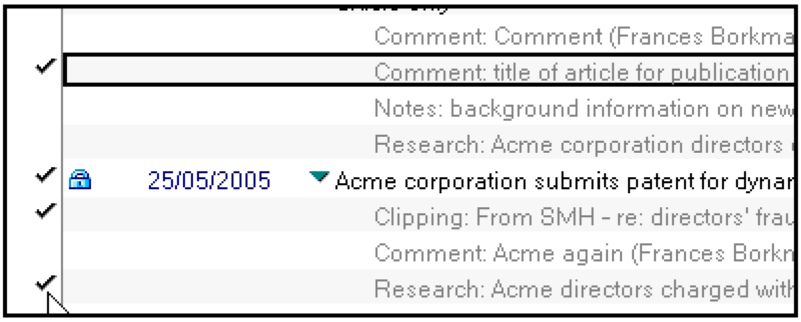


Figure 176: Several articles are selected to be put in a folder. Each selected article is marked with a tick.

4. Move your cursor to the title of one of the articles to be put in your folder.

5. Drag the articles to the folder. As you drag your articles the cursor changes to a "no permission" cursor until you are at a folder. When you can drop your articles in a folder the cursor changes to a pointer with article icons.

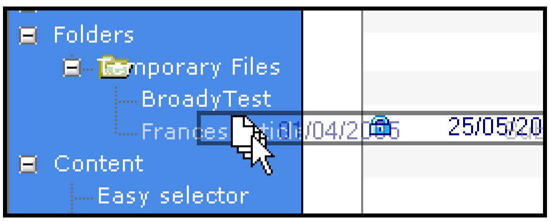


Figure 177: Cursor indicating that several articles are being put in a folder.

6. Drop your articles in the required folder.

18.4 Using Folders to List Articles

After you have placed your articles in the required folders you may use those folders as a quick way of accessing your articles. Folders are used like Views – the only differences are that only the articles that you placed in the folders are listed – you don't have to search through other articles.

1. Go to your database **`Home`** page.
2. Click on *Folders*.
3. Navigate through the folders until you see the required folder listed.
4. Click on the folder name that contains the articles you want to work with.
5. The articles are now listed in the body of your page.

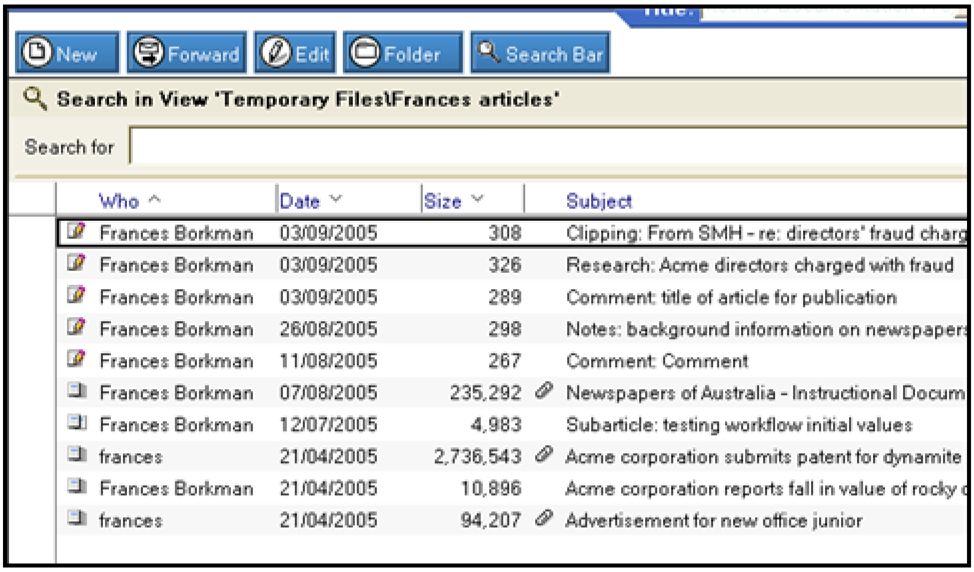


Figure 178: Folder "Frances articles" has been selected and all articles in the folder are listed.

6. Each article has an icon next to the author name.
   -  indicates an article or subarticle
   -  indicated a comment or backgrounder.
7. You can now select an article to edit, just as you would by using a View.

18.5 Moving Articles to Another Folder

Only move articles from one of your private folders to another of your private folders.

1. Go to the folder that has the article you want to move.
2. Click on the article.
3. Click on <*Folder*> (in the toolbar above the listed articles).
4. Select *Move to Folder*.
5. The **Move to Folder** dialogue box displays.

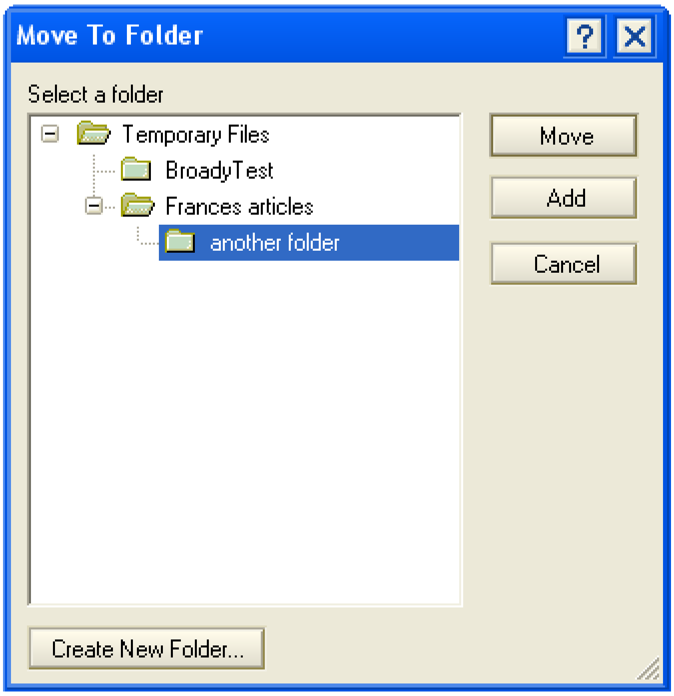


Figure 179: Move to Folder dialogue box with folder "another folder" selected.

6. Click on the folder to which you want to move the article.
7. Click on <*Move*>.

i Adding an article to another folder

Sometimes you may want to copy your article to another folder.

1. Repeat steps 1 to 6 above.
2. Click on <*Add*>.
3. Your article is added (copied) to the other folder.

18.6 RENAMING A FOLDER

Only rename your own private folders. Ask your system administrator if you want any shared folders renamed.

1. Move your mouse to the navigation pane.
2. Right-click on the folder you want to rename. A popup menu displays.
3. Select *Rename Folder…*
4. The **Rename folder** dialogue box displays.
5. Name: type the new name of the folder in the Name field.
6. Click on <*OK*> to accept the new name, or <*Cancel*> to keep the old name.

18.7 REMOVING A FOLDER WHEN YOU NO LONGER NEED IT

1. Go to your database **Home** page.

2. Click on *Folders*.
3. Navigate through the folders until you see the required folder listed.
4. Right-click on the folder.
5. Select *Remove Folder…*
6. A message displays `“This action may not be undone.  Are you sure you want to remove the folder ‘(foldername)’ from this database.”`
7. Click on <*Yes*> to remove the folder.

19. Team tools

Team tools are available from the navigation pane in the **`Home`**, **`Creating`**, **`Editing`**, **`Setup`** and **`Development`** tabs. The tools available in each tab are relevant to the tab (not all have the same tools).

Tools are:

- Inbasket
- Bulletin board
- Deadlines
- Calendar / Team Calendar

19.1 OBJECTIVES

By the end of this chapter you should:

- be familiar with the purpose of the Inbasket
- know how to use the Inbasket for items that require follow-up, story leads, articles submitted to an inbasket email address
- know how to post items to the Bulletin Board
- be able to delete a posting that you made to the Bulletin Board
- know how to use the Deadlines feature.

19.2 INBASKET

The Inbasket is used for work that hasn't yet been assigned or has recently been submitted by authors.

If authors are submitting their copy to an email address, they often submit to an inbasket email address. The address is contained in the email brief that is sent via edDesk. This means that editors can go to their Inbasket and then edit the article, assigning appropriate sections and subsections and other information.

The inbasket can also be used for items that need to be followed up, for example, potential story ideas.

Inbasket items are articles, assigned to section *Inbasket*.

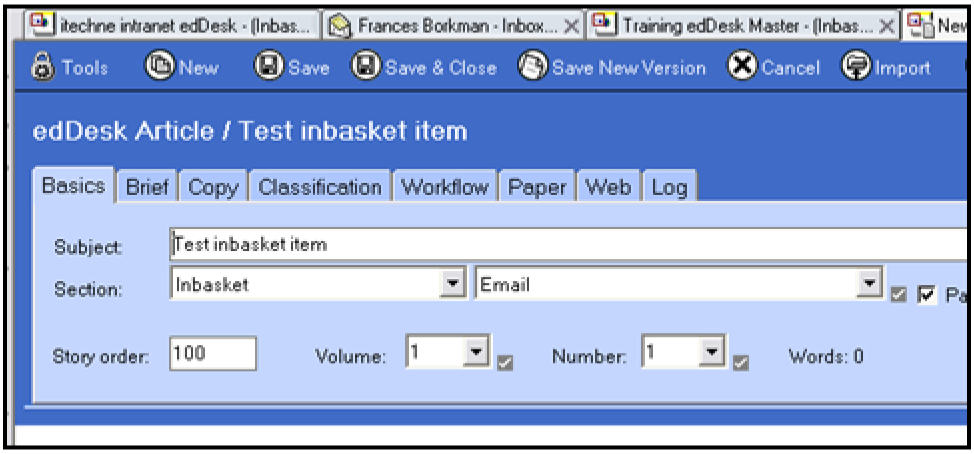


Figure 180: Inbasket item that is going to contain an email

1. Create the article as usual.
2. Section: select *Inbasket*.
3. Subsection: choose from *Email* or *Stories*:
   a. Email: select this option if you are copying an email into the Inbasket. This is often used for new projects, or ideas / leads to follow up.
   b. Stories: select this option for all other Inbasket articles.
4. Volume / Issue: If you don't know when you want this Inbasket articles to be published or posted, you can select Volume: 1 Number 1.
5. <*Save*> your Inbasket article.

i Looking at the Inbasket

1. Select **Team tools**, from the navigation pane.
2. Select *Inbasket*. All inbasket items are listed.

19.3 BULLETIN BOARD

Bulletin board is generally used by people as a "classifieds" and for interesting snippets of information.

Each listing on the bulletin board is known as a "post". Posts are categorised when you create them:

- Announcement
- Press Release
- Notice
- Reminder
- Comment

i Posting an item to the bulletin board

1. Click on <*New Post*>.
2. The **Post / New post** form displays as below.

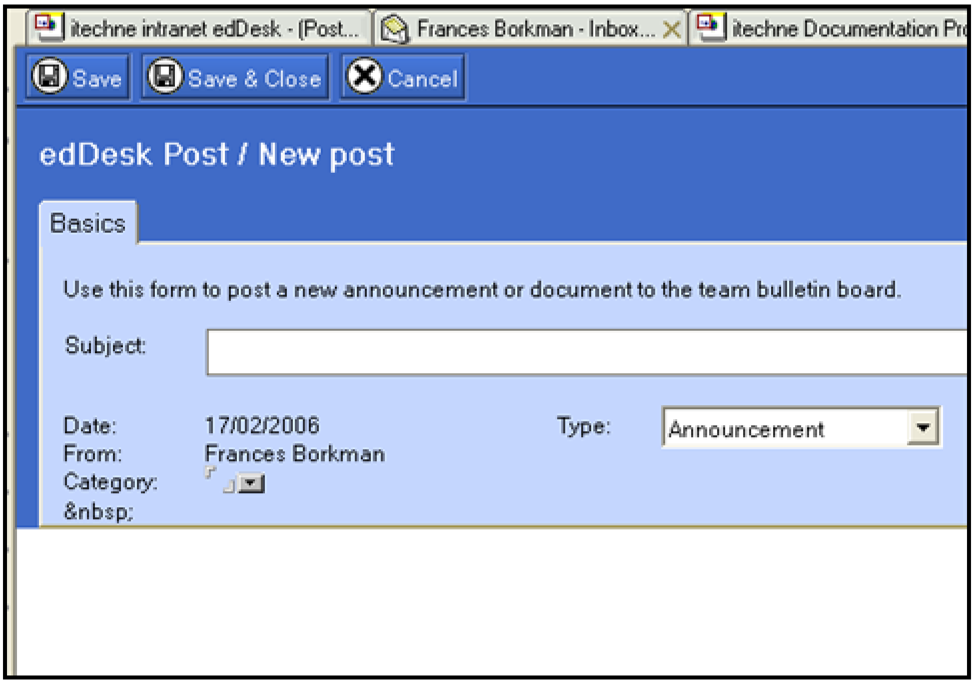


Figure 181: Post / New post form when first displayed.

3. Subject: enter the subject of your post. The subject is displayed on the bulletin board listings. Make sure it is meaningful.
4. Type: select the type of item you are posting. Your choices are:
5. Category: enter keywords for your post. Separate keywords with a comma.
6. Enter the text for your bulletin board post in the white text area.
7. Click on <*Save*> or <*Save & Close*> when you have created your post.

ii Deleting a posting from the Bulletin board

1. Click on the post to be deleted.
2. Press <*Delete*>. The post is marked with a cross. Do this for each post to be deleted.

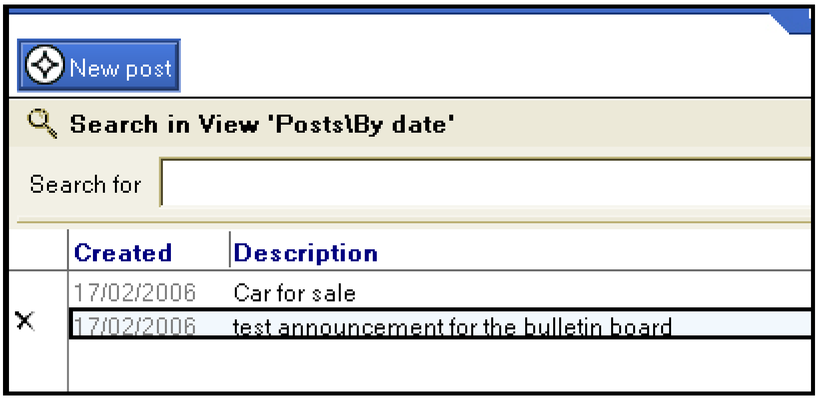


Figure 182: Posting to be deleted is marked with an "X".

3. Press <*Refresh (F9)*>.
4. A message displays “`Do you want to delete (number of items) documents from the database (databasename)?`”
5. Click on <*Yes*> to delete the post(s).
6. Your Bulletin board is updated and the deleted posts are no longer listed.

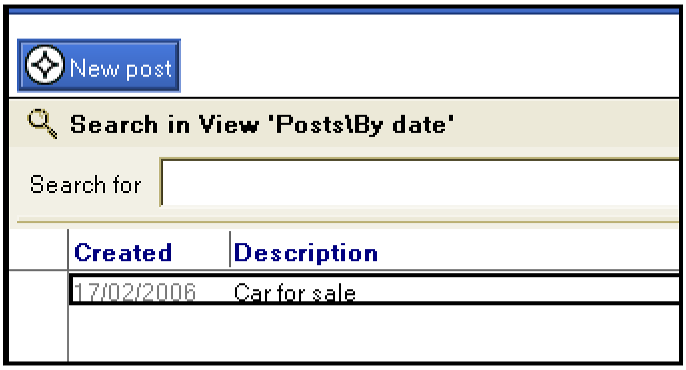


Figure 183: Deleted postings no longer listed after Refreshing.

iii Displaying bulletin board postings

You can display items posted to the Bulletin board from the:

Left navigation pane

1. Select **Team tools**.
2. Select *Bulletin board*. The bulletin board is displayed as below.

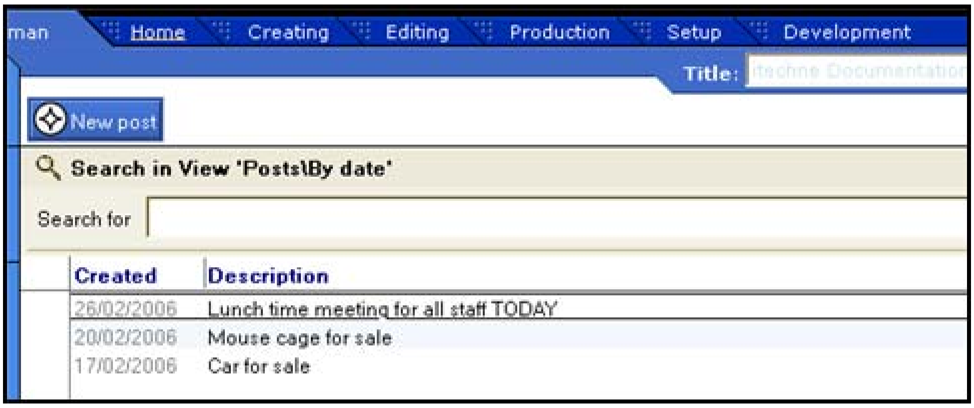


Figure 184: Bulletin board.

Home tab

1. Select the **Home** tab.
2. Look at the **Announcements** area – at the bottom right of the tab.

Figure 185: Announcements area displaying the most recent bulletin board postings.

3. The bulletin board postings are displayed, with the most recent posting at the top of the list.
4. *New post*: select this if you want to add a new post to the bulletin board.
5. *View more announcements*: select this if you want to view the entire bulletin board.

19.4 DEADLINES

Deadlines lists all deadline dates for articles. The most future deadline is at the top of the list. The default is to show an "expanded view" of your deadlines. This means that subarticles are also listed.

A down triangle next to an article subject means that the article has subarticles and they are displayed hierarchically, with each level of the hierarchy being indented from its parent.

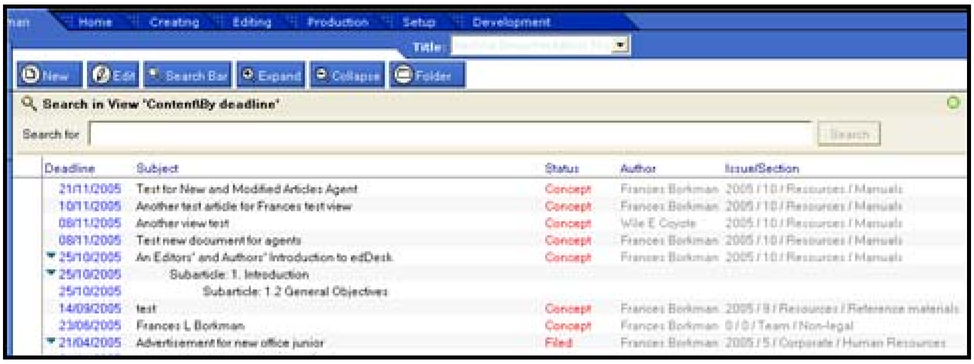


Figure 186: Default Deadlines page. Note that subarticles are listed.

Information displayed is:

- Deadline date: date entered at the **Brief** tab in the Copy deadline field.
- Subject: Subject of the article.
- Status: where the article is up to in the workflow.
- Author: name of the author assigned to thearticle.
- Issue/Section: Volume and Issue number for the article and the section and subsection in which the article has been created.

ⓘ see <u>section 4.4ii: Display of results</u> for instructions on expanding and collapsing the article hierarchy.

ⓘ see <u>Chapter 18: Folders</u> for instructions on using Folders.

19.5 Calendar / Team Calendar

This feature is currently being developed and is unavailable.

20. Non-technical administration of edDesk

This chapter instructs you in maintaining some of the items in dropdown lists that you choose from edDesk menus. Most of this administration is done using the **`Setup`** tab.

This chapter is not for technical administration – rather it is for administration that a “super user” can perform. You do not need technical knowledge to do the maintenance covered in this chapter.

20.1 OBJECTIVES

By the end of this chapter you should have the knowledge and skills to add, delete and edit:

- Section and Subsection information
- Volume and Issue information
- Keywords and subtopics
- Geographical regions and areas within those regions.

20.2 SETUP TAB

Most of the non-technical administration of edDesk is done through the **`Setup`** tab. The body of the **`Setup`** tab is broken into two parts – **Create new items** and **Setup tools**.

> **Important**
>
> Before creating new items go to the relevant Setup tools and see if the items already exist.
>
> If items already exist you may just need to update them – but be careful. Your updates will update every article that uses that item.

The **`Setup`** tab lets you create and maintain:

- sections
- subsections
- issue definitions
- keyword topics
- geographical regions

20.3 SECTIONS

Use this to view, edit and create top-level section structure. Use this view instead of **Create new section** because **Sections** lists all current sections instead of going straight to the new section entry form. This means that you are less likely to create duplicate sections!

Section information is mandatory and is entered when an article is created.

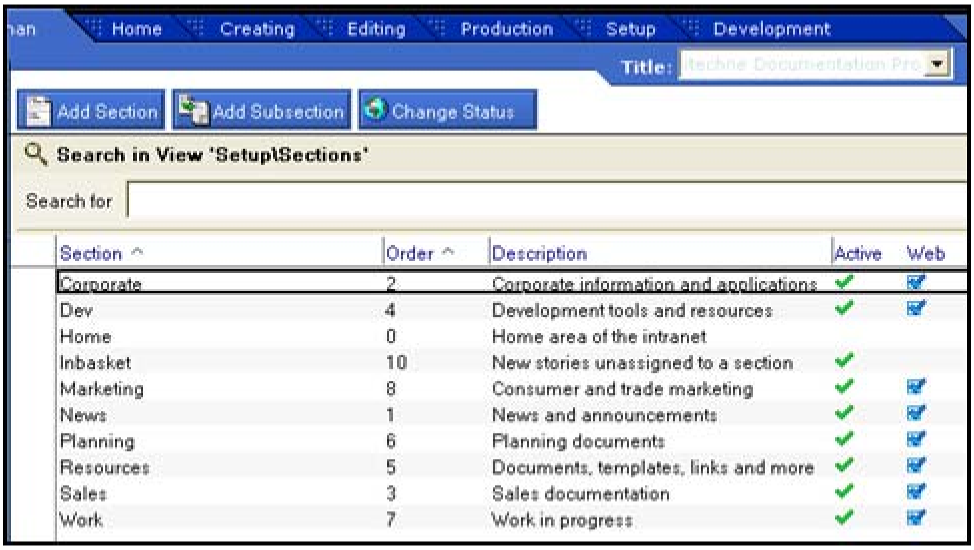


Figure 187: Sections listed alphabetically

Information displayed is:

- Section name – sections are listed alphabetically.
- Order – this is used when you are maintaining subsections. Sections are listed in the order given in the sections view. If sections have the same order they will be listed alphabetically.
- Description - description of section and type of content that would be assigned to this section.
- Active – whether the section is available for selection in new articles.
- Web – whether the section is available in online menus.

i Creating sections

1. Go to the **`Setup`** tab.
2. Select *Sections*.

3. Click on <*Add Section*>. The **Section definition** form displays.

Figure 188: Section definition form

4. Title of the section: enter the title that you want to display when people assign articles to a section. Sections are listed alphabetically by title in the Sections view.

5. Order in the publication: enter a number. The default is 10. Sections are listed by this order in the **Subsections** view. Order determines the order in which sections are listed when you are assigning them in an article and in various views (especially the Easy content selector).

6. Description of section: enter a description that indicates the type of articles that should have this section applied. For example, the section Dev has a description of “Development tools and resources”.

7. Section Editors: Name of the people who edit articles that are given this section.

8. Show in online menus?: Select *Yes* if you want the section available in the web version of edDesk.

9. Is Section available for new articles?: Select *Yes* if you want to make this available for new articles. This gives the Section an **Active** status.

10. Click on <*Save & Close*>.

11. Your section is added to the **Sections** view.

ii Editing sections

1. Go to the **`Setup`** tab.

2. Select *Sections*.

3. Double-click on the section name. The **Section definition** form opens.

4. Make your changes.

5. Click on <*Save & Close*>.

20.4 SUBSECTIONS

Use **Subsections** to view, edit and create subsections. The subsections are grouped by section. You must use **Sections** to maintain information about top-level sections.

Subsection information is mandatory and is entered when an article is created.

Figure 189: Subsections grouped by Section and listed by Order

Information displayed is:

- Section – the section that this subsection has been created in.
- Subsection – name of the subsection.
- Description – description of subsection and type of content that would have this subsection assigned.
- Order – the order by which you want the subsections to be listed when creating / editing an article.
- Active – whether the section is available for selection in new articles.
- Web – whether the section is available in online menus.

i Creating subsections

1. Go to the **Setup** tab.
2. Click on *Subsections*.
3. Click on <*Add Subsection*>. The **Subsection definition** form displays.

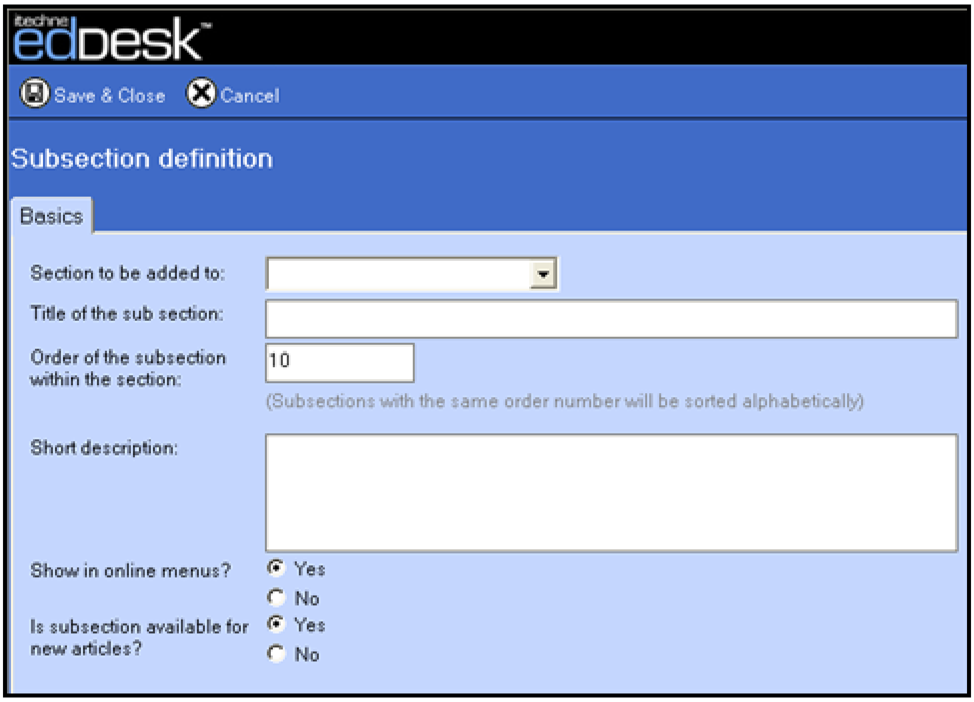


Figure 190: Subsection definition form

4. Section to be added to: Select the section that you want this subsection to be in.
5. Title of the subsection: Enter subsection title. This is what people see when they assign an article to a subsection.
6. Order of the subsection within the section: Enter the order that you want to list this subsection. The default is 10. Order determines the order in which subsections are listed when you are assigning them in an article and in various views (especially the Easy content selector).
7. Short description: Enter a description that indicates the type of articles that should be assigned to this subsection. For example, the subsection Leads (in section Sales) has a description of "Sales leads and ideas".
8. Show in online menus?: Select *Yes* if you want the subsection available in the web version of edDesk.
9. Is subsection available for new articles?: Select *Yes* if you want to make this available for new articles. This gives the subsection an **Active** status.
10. Click on <*Save & Close*>.
11. Your subsection is added to the **Subsections** view.

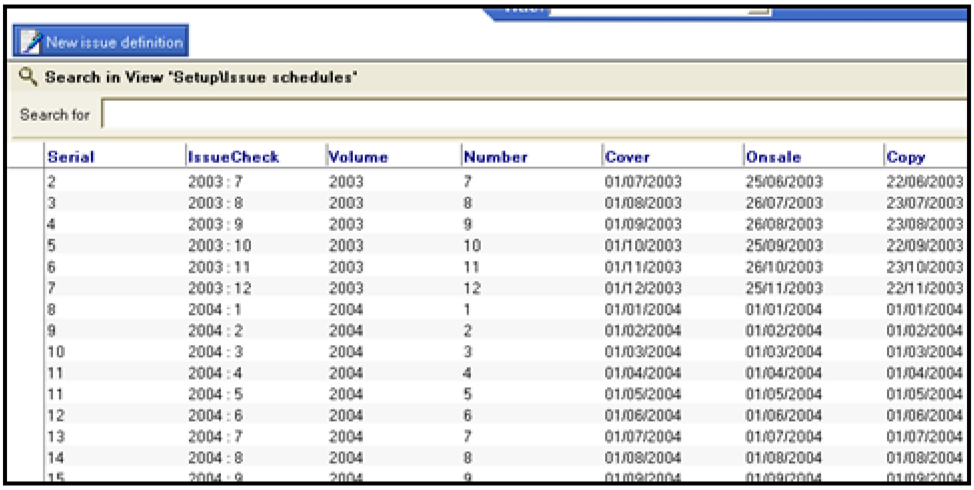
ii Editing subsections

1. Go to the **`Setup`** tab.
2. Select *Subsections*.
3. Double-click on the subsection name.
4. The **Subsection definition** form opens. Make your changes.
5. Click on <*Save & Close*>.

20.5 PRODUCTION SCHEDULE – VOLUME AND ISSUE DEFINITIONS

Production schedule lets you view, edit and create new issue definitions. Issue definitions contain information about Issues and Volumes, including all relevant dates for production of the publication.

Issue and Volume are mandatory fields when creating articles.



Serial	IssueCheck	Volume	Number	Cover	Onsale	Copy
2	2003 : 7	2003	7	01/07/2003	25/06/2003	22/06/2003
3	2003 : 8	2003	8	01/08/2003	26/07/2003	23/07/2003
4	2003 : 9	2003	9	01/09/2003	26/08/2003	23/08/2003
5	2003 : 10	2003	10	01/10/2003	25/09/2003	22/09/2003
6	2003 : 11	2003	11	01/11/2003	26/10/2003	23/10/2003
7	2003 : 12	2003	12	01/12/2003	25/11/2003	22/11/2003
8	2004 : 1	2004	1	01/01/2004	01/01/2004	01/01/2004
9	2004 : 2	2004	2	01/02/2004	01/02/2004	01/02/2004
10	2004 : 3	2004	3	01/03/2004	01/03/2004	01/03/2004
11	2004 : 4	2004	4	01/04/2004	01/04/2004	01/04/2004
11	2004 : 5	2004	5	01/05/2004	01/05/2004	01/05/2004
12	2004 : 6	2004	6	01/06/2004	01/06/2004	01/06/2004
13	2004 : 7	2004	7	01/07/2004	01/07/2004	01/07/2004
14	2004 : 8	2004	8	01/08/2004	01/08/2004	01/08/2004
15	2004 : 9	2004	9	01/09/2004	01/09/2004	01/09/2004

Figure 191: Production schedule

Information displayed is:

- Serial – number used to order the Production schedules. The oldest issues will have the smallest serial number.
- IssueCheck – Year: Month number.
- Volume – Year of the volume.
- Number – issue number.
- Cover – cover date.
- Onsale – date the issue goes on sale.
- Copy – date by which copy must be received to adhere to the Production schedule. If copy is not received by this date it is shown in the **Late running copy** view (in the **`Editing`** tab).

i Creating issue definitions

1. Go to the **`Setup`** tab.
2. Select *Production schedule*.
3. Click on the issue at the bottom of the schedules.

> **Handy hint**
>
> Some information is pre-filled when you click on <New issue definition>.
>
> If you click once on the issue at the bottom of the list before you click <New issue definition> the pre-filled information is for the previous issue – it's easy to then just increment numbers.

4. Click on <*New issue definition*>. The **Issue definition** form displays.

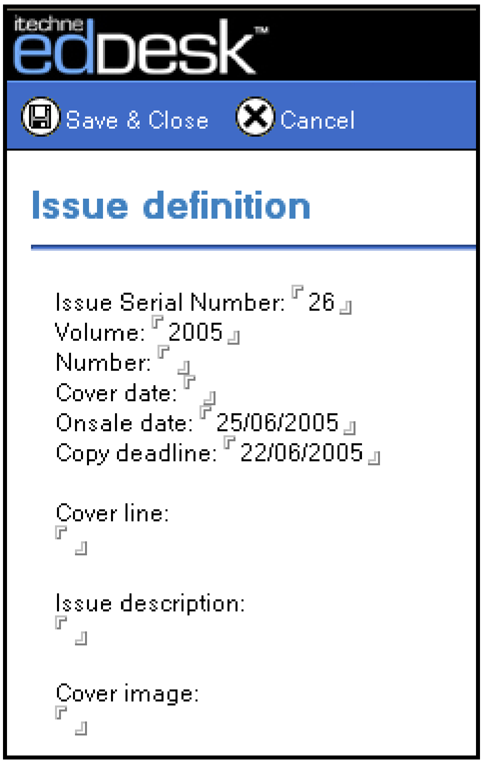


Figure 192: Issue definition form with some fields pre-filled with information from the previous Issue.

5. Issue Serial Number: Add one to the number already in the field. For example if the field is pre-filled with 26 then the number for the issue definition you are creating will be 27.
6. Volume: Volume is usually the year of the publication.
7. Number: Issue number within the volume. A monthly publication would have the number equating to the month. For example, Volume 2005, Number 9 would be September 2005.
8. Cover date: Date to appear on the current issue's cover.
9. Onsale date: Date the issue is first on sale.
10. Copy deadline: Date by which all copy must be received in order to meet the publishing schedule.

11. **Cover line**: This is optional. A very short (two or three words) version of the main cover line.

12. **Issue description**: This is optional. One paragraph summary of the main story for this issue.

13. **Cover image**: This is optional. Use the **File** menu then select *Attach* to attach a 80 pixel, 60% quality JPEG of the cover image. Name any cover images in the format `publicationtitle_cov_ddmmyy.jpg`

14. Click on <*Save & Close*>.

15. Your new Issue definition is added to the list of production schedules.

ii Editing issue definitions

1. Go to the **`Setup`** tab.
2. Select *Production schedule*.
3. Double click on the issue definition you need to edit. The **Issue definition** form opens.
4. Click on <*Edit*>.
5. Make the required changes.
6. Click on <*Save & Close*>.

20.6 KEYWORD TOPICS

Keywords are used to classify articles. Keywords are used by indexes and search engines and when the appropriate words are selected the articles are easier and faster to find. Keywords are divided into keyword topics and subtopics. ⓘ see section 11.3i.: Keyword Topics for more information on using Keywords in articles.

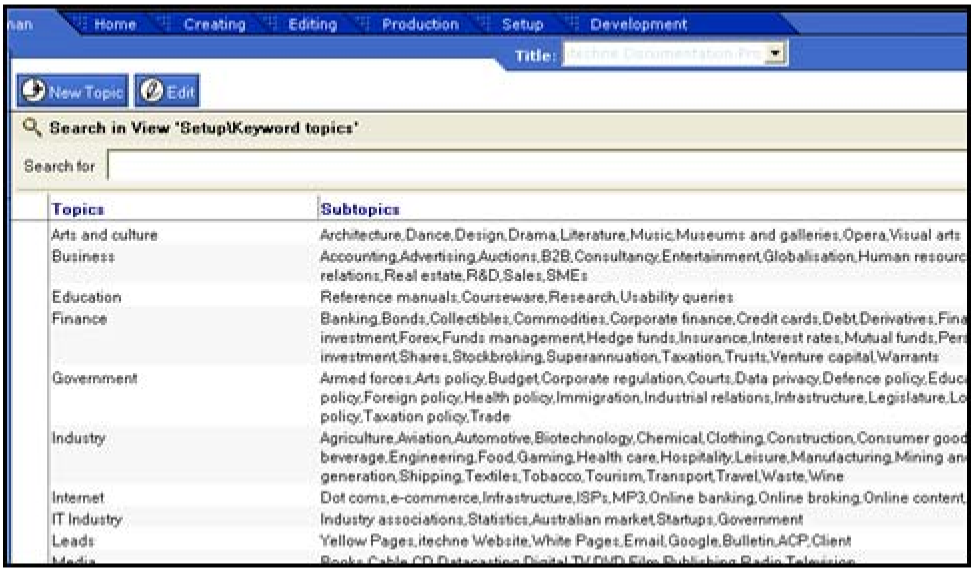


Figure 193: Keyword topics and subtopics.

Information displayed is:

- **Topics** – the major keyword topics

- Subtopics – subtopics within each topic. Subtopics are listed in the order in which they were created in the topic.

i Creating keyword topics and subtopics

1. Go to the **`Setup`** tab.
2. Select *Keyword topics*.
3. Click on <*New Topic*>. The **Keyword topic definition** form displays.

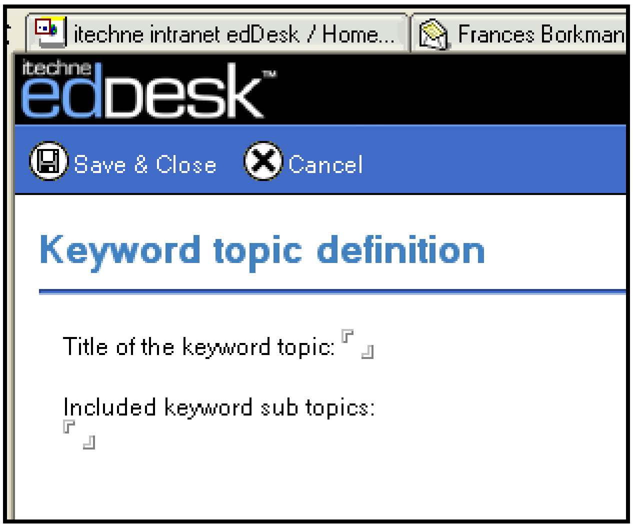


Figure 194: Keyword topic definition form

4. Title of the keyword topic: Enter the title of your keyword topic. Make sure that it is meaningful and describes the type of subtopics that you will create in this topic.
5. Included keyword sub topics: Enter the keyword subtopics. Separate each subtopic with a comma. Type the subtopics in the case want them to appear in when people are classifying their articles.
6. Click on <*Save & Close*>.
7. Your keyword topic and subtopics are added to the list of keyword definitions and are now available to be used in articles and in views.

ii Editing keyword topics and subtopics

1. Go to the **`Setup`** tab.
2. Select *Keyword topics*.
3. Click on the topic you want to edit.
4. Do one of the following:
   a. Click on <*Edit*>. The **Keyword topic definition** form opens.
   b. Double click on the topic. The **Keyword topic definition** form opens. Click on <*Edit*>.
5. Make your changes as required.
6. Click on <*Save & Close*>.

20.7 GEOGRAPHY

Geography is used when classifying articles to indicate which regions the article is relevant, or in which regions it will be published. ⓘ see section 11.3ii: Geography for more information.

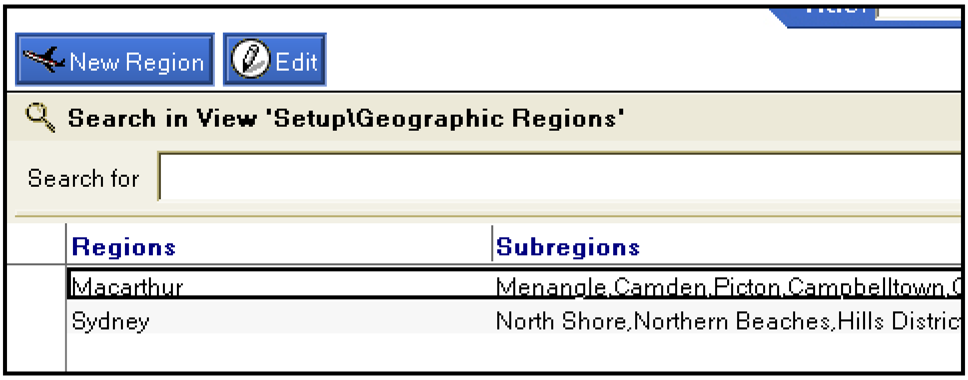


Figure 195: Sample Geograpical regions.

Information displayed is:

- Regions – The main region. This could be an entire country, or a locale.
- Subregions – parts of the region. This could be states of a county, areas of a city or particular towns/suburbs in a locale.

i Creating Regions

1. Go to the **Setup** tab.
2. Select *Geography*.
3. Click on <*New Region*>. The **Geographic region definition** form displays.

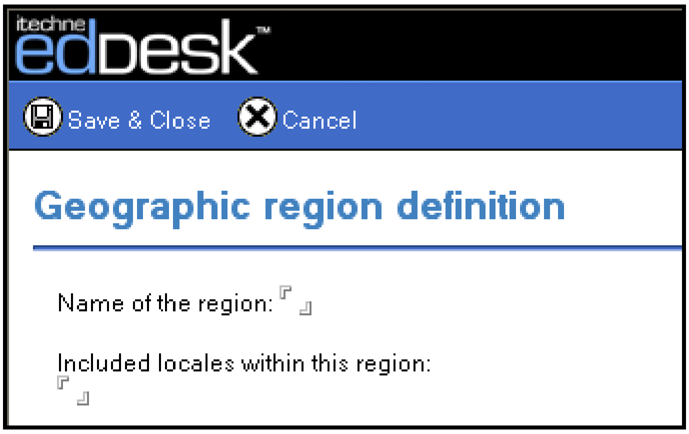


Figure 196: Geographic region definition form

4. Name of the region: enter the name of the region. The name is listed in the article **Classification** tab.
5. Included locales within this region: Enter the locales for this region. Separate each locale with a comma or type it on a new line. Locales will display as "subregions".

6. Click on <*Save & Close*>.
7. Your regions are now available to be used in articles and in views and searches.

ii Editing regions

1. Go to the **`Setup`** tab.
2. Select *Geography*.
3. Click once on the region you want to edit.
4. Do one of the following:
   a. Click on <*Edit*>. The **Geographic region definition** form opens.
   b. Double click on the topic. The **Geographic region definition** form opens. Click on <*Edit*>.
5. Make the required changes.
6. Click on <*Save & Close*>.

20.8 PUBLICATION TITLES

Publication titles

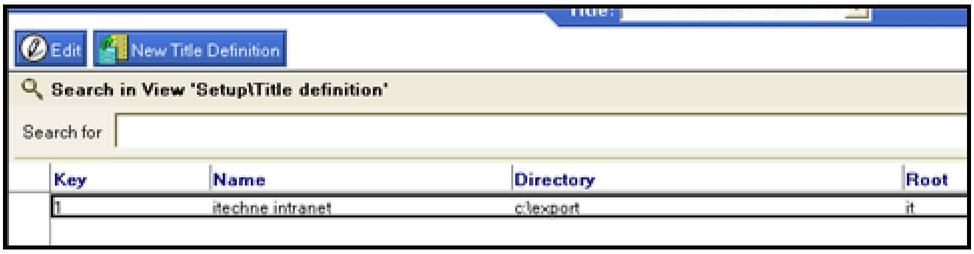


Figure 197: Title definition page.

Information displayed is:

- Key – number assigned by edDesk. Each title definition has its own unique number, indicating the order in which the title definitions were created.
- Name – title of the publication.
- Directory – production directory in which files to be used with this publication should be stored.
- Root –

i Creating title definitions

1. Go to the **`Setup`** tab.
2. Select *View existing title definition*.
3. Click on <*New Title Definition*>. The **Publication title definition** form displays.

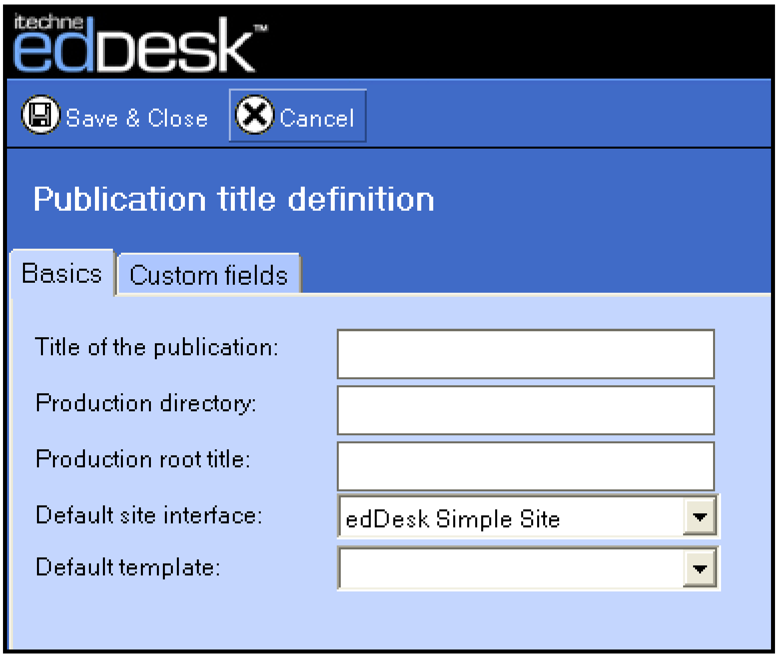


Figure 198: Publication title definition form

4. Title of the publication: enter the publication title here.
5. Production directory: enter the directory in which all files to be used in this publication will be stored. This includes standard images used across the publication.
6. Production root title: Leave this blank if you do not know.
7. Default site interface: The default is *edDesk Simple Site*. Select your publication's interface from the menu if you do not want to use the default.
8. Default template: select your default export template. This will ensure than formatting used in your publication is applied to articles in this publication.
9. Click on <*Save & Close*>.

ii Editing title definitions

1. Go to the Setup tab.
2. Select *View existing title definitions*.
3. Double click on the definition you want to edit. The **Publication title definition** form opens with the information for your selected publication.
4. Select <*Edit*>. Make the required changes and <*Save & Close*>.

Appendix A: Creating simple Views

A view is a list of articles in a database. Views let you sort, categorise and select articles. They display information about the articles.

Views can be created by any person with the access to read articles in a database. The person creating a view specifies the view criteria so that only articles fulfilling particular criteria will be listed in that view.

Views are similar to folders, except that views are automatically updated as articles are added to and deleted from your database.

ⓘ see chapter 4: Views for information and instructions about using edDesk's standard views.

OBJECTIVES

By the end of this chapter you should be able to:

- create simple views
- use your views to list articles fitting the view criteria
- go to required views
- edit your views
- rename views
- delete views (that you created) when they are no longer needed.

CREATING A SIMPLE VIEW

The easiest way to create a view is to base it on a view that is already in your database, and then just adjust the conditions and information that you want to display. This gives your view a better chance of working, and can avoid a lot of frustration! When you have more experience, you can create a view "from scratch".

1. Go to the **Home** tab.
2. Select the **Create** menu.
3. Select *View…*. The **Create View** dialogue box displays.

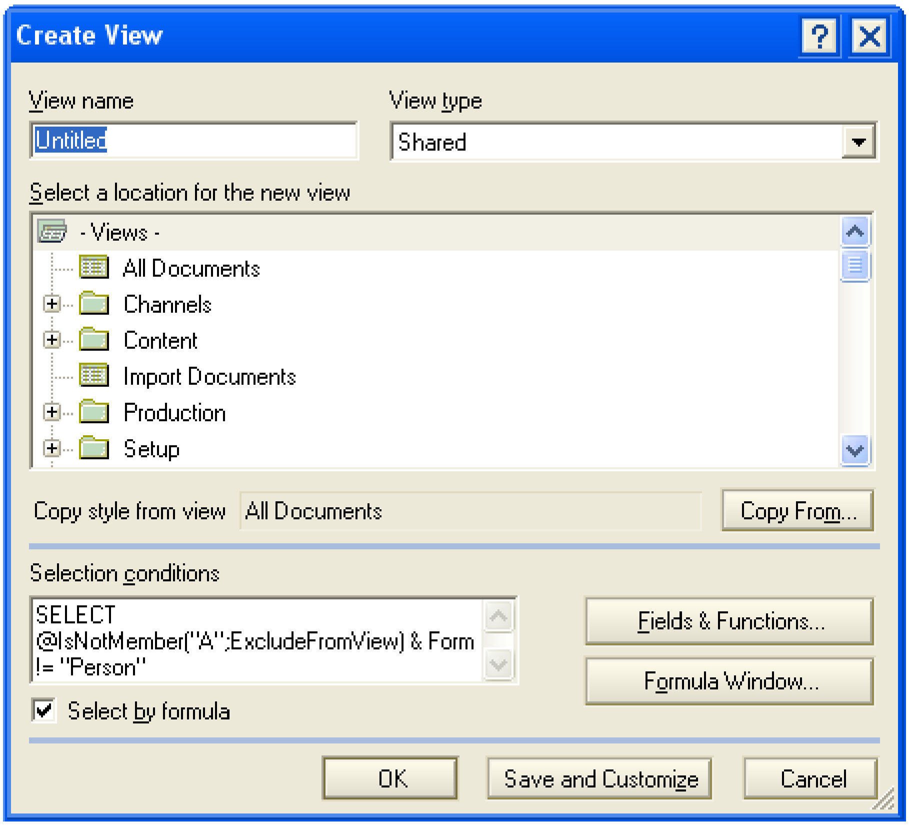


Figure 199: Create view dialogue box with default information displayed

4. View name: enter a name for your view.

5. View type: Your choices are:

   - *Shared* - this is the default. Shared allows anyone with access to the database to use this view.
   - *Shared, contains documents not in any folders* – DON'T WORRY ABOUT THIS ONE
   - *Shared, contains deleted documents* – Lets you see a list of deleted articles. Useful if you have accidentally deleted some articles, because it helps you retrieve them.
   - *Shared, private on first use* – DON'T WORRY ABOUT THIS ONE.
   - *Shared, desktop private on first use* – DON'T WORRY ABOUT THIS ONE.
   - *Private* – can only be used by the person who created it, and the database administrators.

6. Select a location for the view. If your View Type is *Private* you can only put your new view into your list of private views.

7. Copy style from view: The default is *All documents*. This means that your new view will inherit the columns of information that display in the *All documents* view. This is a good thing to do when you are creating your first

view (as the All documents view works properly!) You can add your own criteria for articles to be listed in your view.

ⓘ see section for more information on creating views from scratch.

8. Selection conditions: If you have left the Copy style from view as *All documents*, this field displays a lot of criteria for articles to be listed in the All documents view. Don't do anything to this field.

9. Select by formula. Uncheck this! Then the **Create view** dialogue box changes slightly to let you add conditions for your view.

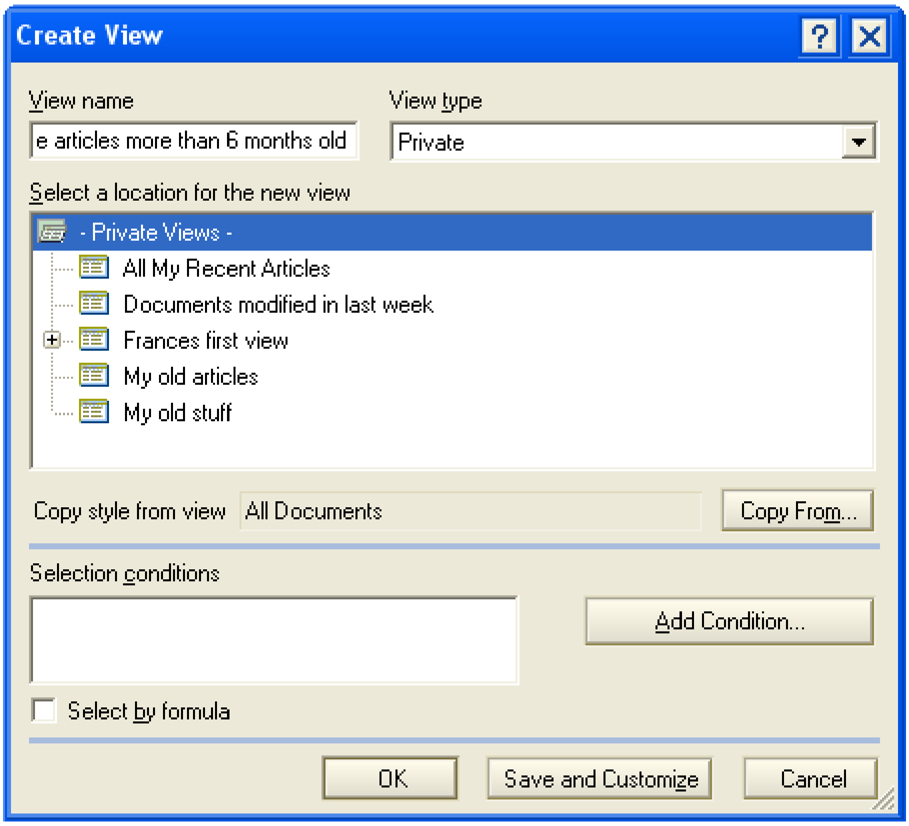


Figure 200: Create View dialogue box with "Select by formula" unchecked. Now you can Add Conditions for your view.

10. Click on <*Add Condition…*>. The **Add Condition** dialogue box displays. Remember that only articles that match the conditions you enter here will be displayed by your view.

ⓘ see section 5.6i: Conditions for more information on adding conditions.

11. Add the required conditions.

12. Click on <*OK*>. The view is saved.

Going to your view

When you created your view, you selected a location for it. To use your views you must "go to" them. Private views can only be saved in your list of private views.

The easiest way to go to one of your views is to display a standard edDesk view. When you are in a view you can then tell edDesk to go to your view.

1. Display any view (a simple one is **All Issues**, as there will be articles listed).
2. Click once on any article in the view (you don't have to do this if you are using the **All Issues** view).
3. Select the **View** menu.
4. Select *Go To…*
5. The **Go To** dialogue box opens, listing all views.

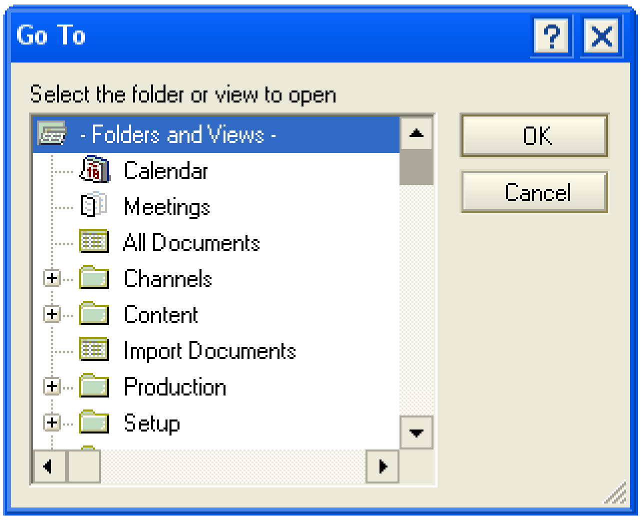


Figure 201: Go To dialogue box. Your private views are at the bottom of this list.

6. Your private views are at the end of the list. Scroll down to the required view.
7. Click on the view you want to go to.
8. Click <*OK*>.
9. Your view is displayed.

CUSTOMISING A VIEW

Customising is a simple way of letting you change which columns display, the order in which columns are displayed and whether they are sorted. Customising does NOT let you edit the view conditions.

1. Go to the view to be customised.

   ⓘ see Going to your view for instructions.

2. Select the **View** menu.
3. Select *Customize This View…*. The **Customize View** dialogue box displays.

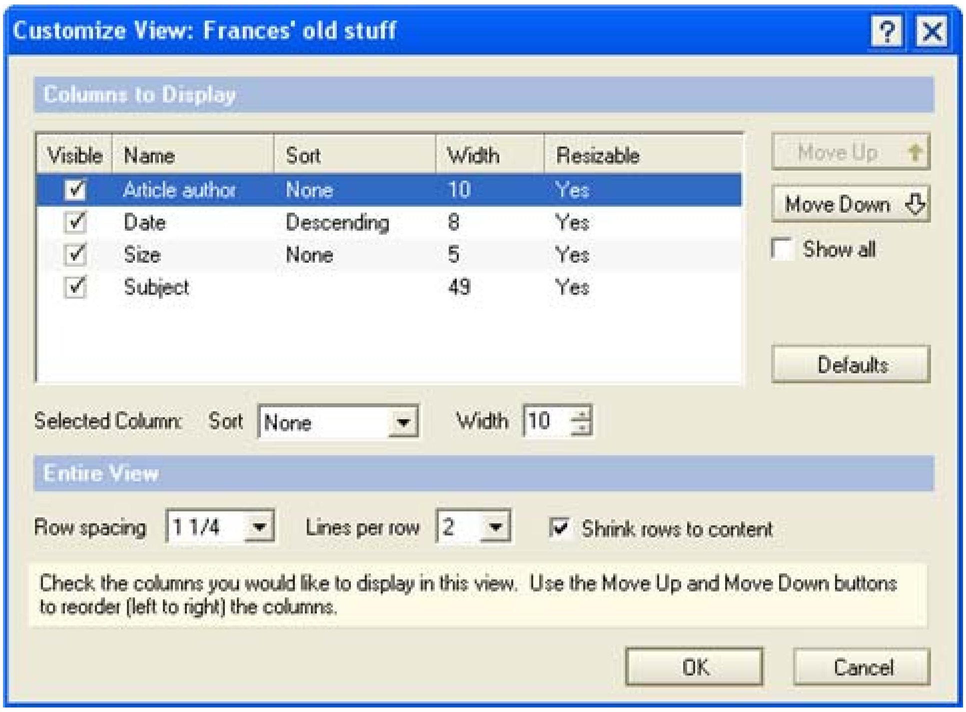


Figure 202: Customize View dialogue box

Columns to Display

Columns are listed with the leftmost column at the top. The first column is selected (highlighted in blue).

Information displayed here is:

- Visible: All of your columns are checked by default. If you click on the checkbox (and the tick is removed) your column will not display in the view.
- Name: This is the name of the column. This can only be changed in the **Design View** window. ⓘ see Designing views for more information.
- Sort: Indicates whether the column is sorted.
- Width: Width of the column as it is displayed.
- Resizable: If this is *Yes* you can change the width of the column.
- Selected Column: This lets you change the sort method and width of the selected column.
    - Sort: Choose from *None*, *Ascending* and *Descending*. *Ascending* will sort in increasing order – the most recent articles are at the bottom of the view. *Descending* will sort in decreasing order – the most recent articles are at the top of the view.
    - Width: you can change the width of the selected column, wherever they are shown as *Resizable*.

1. Make sure that any column you want to display has a tick in the Visible checkbox.
2. Use the <*Move Down* ⇩> and <*Move Up* ⇧> buttons to reorder the columns from left to right. <*Move Down* ⇩> moves your column to the right, <*Move Up* ⇧> moves it to the left.

Entire View

Information you can change here is:

- Row spacing: You can set the vertical spacing between each row in the view. The default of 1¼ is usually the easiest to look at without having too much space between rows.
- Lines per row. This is the maximum number of text lines per row in the view. If you have articles with lengthy subjects you may want to increase this so that the subject is not truncated by the view display.
- Shrink rows to content: Tick this to make sure that shorter text lines do not take up the maximum lines per row (and leave too much gap between rows of articles returned by your view).

1. Make the required changes.
2. Click <*OK*> to save the customised view.
3. Your view is displayed, showing the customisations you have made.

DESIGNING VIEWS

Creating a simple view covered creating a simple view, based on the **All Documents** view.

This section tells you how to design (and redesign) your view so that you can give your columns a different name, make them appear in a different order and change some other display aspects of your view. Designing allows you to make more changes to your view than Customisation does.

This section does not cover advanced aspects of designing views. Please see the Lotus Help for more information on how to perform more advanced customisations.

> **Programming not covered**
>
> This User Guide does NOT cover programming your view. It does cover editing the conditions you set when creating the view and changing some simple display elements of your view. See your System Administrator if you need a more complex view that involves programming.

1. Go to the view that you want to alter.

   ⓘ see Going to your view for instructions.
2. Select the **Actions** menu.
3. Select *View Options*.
4. Select *Design…*

5. The **Design View** pane opens. This contains some technical information, which you don't need to know about!

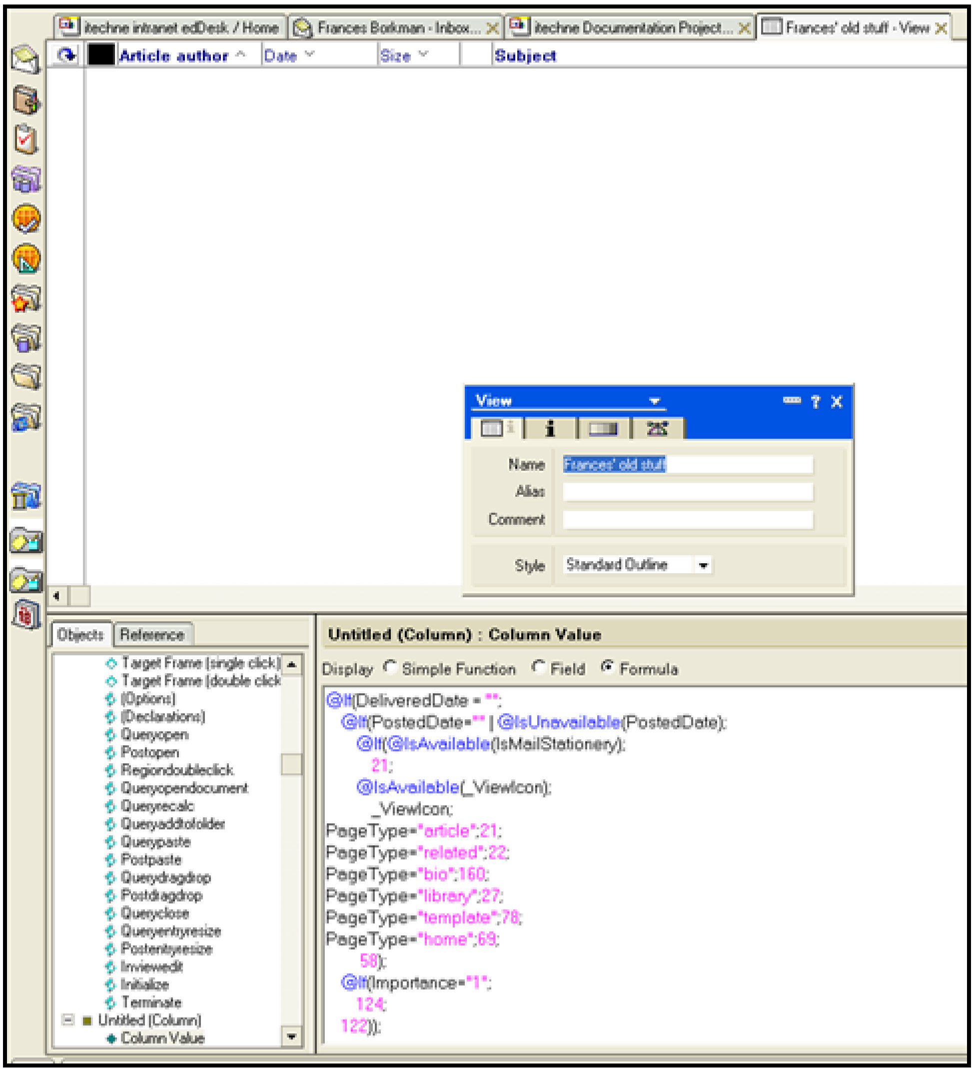


Figure 203: Design view pane, showing the information when your view is based on the "All Documents" view

The top half of the **Design View** pane contains is the ***View Preview***. If you want to see a list of the articles returned by your view, click on *<Refresh (F9)>* or the  at the left of the column headings.

The bottom half of the **Design View** pane is where you make your changes to the view. It is split into two parts – the left column contains elements of your view (this is technical and is not covered in this User Guide). The right column contains the programming details which make the elements in the left column work properly (this is also not included in this User Guide).

Instructions for making simple changes to a view are below.

Modifying selection conditions

Selection conditions determine which articles are listed by your view.

1. Click on the **Selection Conditions** icon - .

2. The current selection conditions are displayed in the bottom right pane of the **Design** pane.

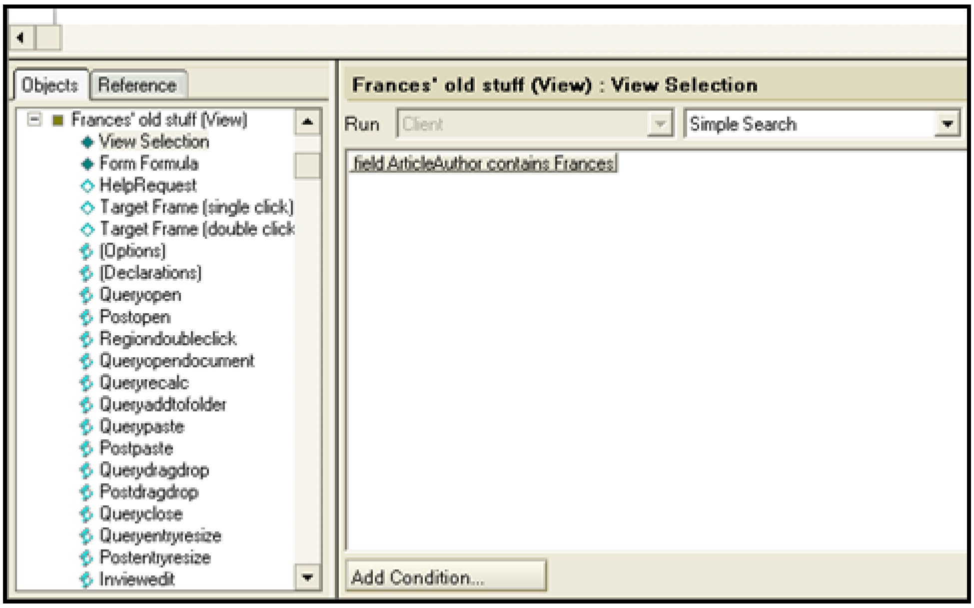


Figure 204: Selection conditions for the view "Frances' old stuff". The only condition is that an article field called ArticleAuthor must contain the name Frances.

3. If you want to add a new condition, click on <*Add Condition…*>.

   ⓘ see section 5.6i: Conditions for information on adding conditions.

4. If you want to edit a condition:

   a. Click on the condition to be edited.

   b. Click on <*Edit Condition…*>. Make the required changes

   c. Click <*Add*>. Your changes are saved.

If you do some non-technical administration as well as create articles...

and you want your view to only list articles where you are an author, not everything that you have created then make sure that your selection condition has the following:

Condition: By field
Field: ArticleAuthor contains
Value: (your name, as it is entered in edDesk)

View properties

View properties control the appearance of the entire view. This includes colours used, text fonts and the view name.

The **View properties** dialogue box must be displayed before you can change view properties.

Figure 205: View properties dialogue box

If the **View properties** dialogue box is not displayed click on the **Database properties** icon .

Renaming a view

1. Click on the **`View info`** tab (the left tab in the View properties dialogue box).

2. Name: enter the new name for the view.

Style attributes

Style can make your view easier to use. Style lets you change the layout of the view. Some of the style options can also be changed in the **Customize View** dialogue box. Changes you make in this tab are shown straight away in the top of the Design View pane.

> **Note**
>
> Not every option is discussed here. You can experiment with the style options and see the results immediately and without affecting which articles are listed.

1. Click on the **`Style`** tab (second from the right in the **View properties** dialogue box). The **`Style`** tab opens.

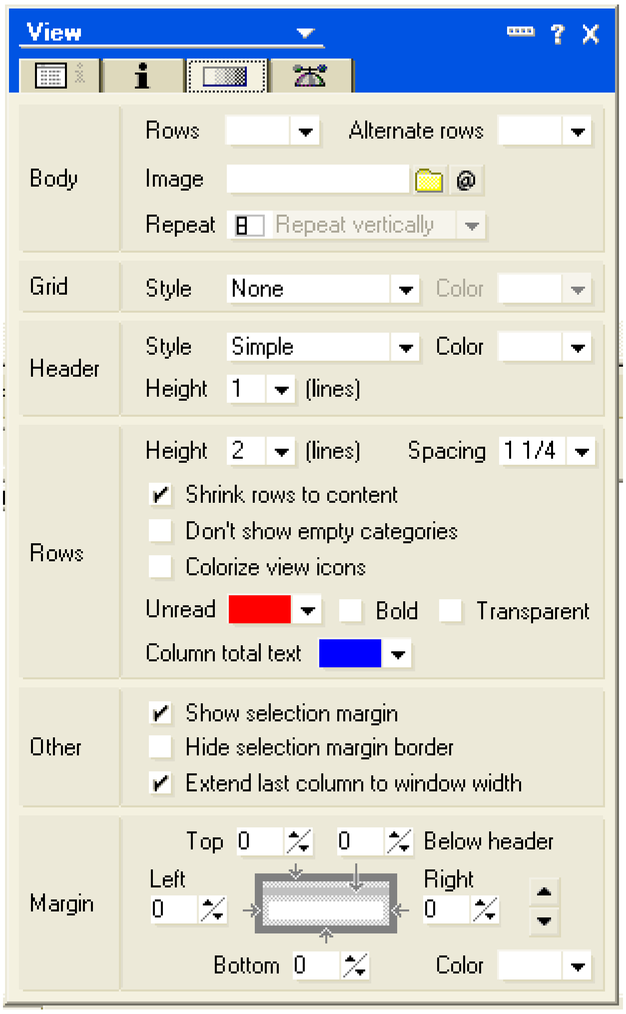


Figure 206: Styles tab

2. Body: used to select colours for the view.

- *Row*: select a colour for the background of the view
- *Alternate rows*: select a different colour for alternate rows to have a different background colour. This makes your view easier to read.

3. Grid: sets a style for gridlines in the view. Grid displays according to the settings in the Header option. Be careful with the Grid option as it can make your view harder to read.

- *Style*: select a style. The default is none.

4. Header: Shows a bar at the top of the view, with column titles in different looks. Your settings here affect how the Grid displays.

- *Style*: select a style.
- *Height*: specifies how many lines the header will take up. If you have long column titles you may want more than one line for the header.

5. Rows: specifies how many lines a column can contain and the spacing between each row. Articles that use more than this will have information truncated. You can also make these settings in the **Customize View** dialogue box.

6. Other:

   - *Show selection margin* – displays a margin to the left of articles in the view. Selected articles are indicated with a tick. This makes it easy see when you are selecting multiple articles.

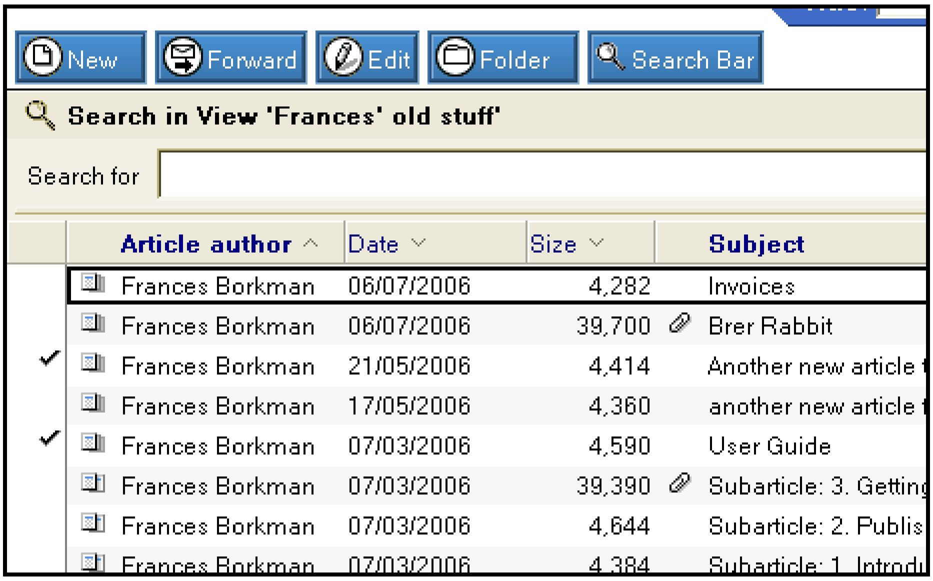


Figure 207: Document selection margin with some selected articles

   - *Hide selection margin border* – if the selection margin is visible, this will remove the border between the margin and the article information.

   - *Extend last column to window width* – select this to make your view easier to read.

7. Margin: Lets you select the amount of whitespace around the view contents.

Column properties

Columns contain information about each listed article. Column properties let you rename the column, change the display of column headings and contents, and sorting of articles within the column.

Display the **Column properties** dialogue box. If the **Column properties** dialogue box is not displayed click on the *Database properties* icon . If the **View properties** is displayed, click on the dropdown list in the top left of the dialogue box and select *Column*.

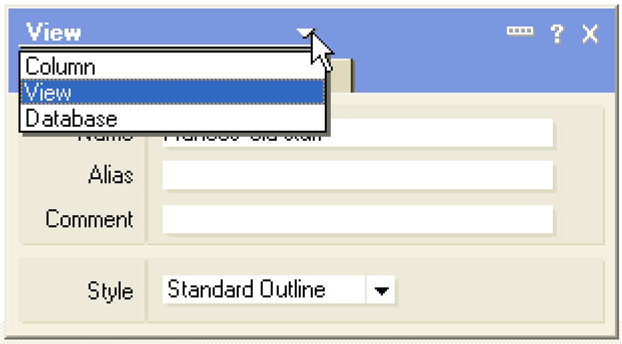


Figure 208: Changing the properties dialogue box from View

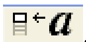
Renaming a column

1. Move your mouse to the ***View Preview*** pane. Click on the column header that you want to rename.

> **Note**
>
> If you click on the column contents the Column properties dialogue box changes to the View properties dialogue box. Click on the column header to redisplay the Column properties.

2. Title: enter the new name for the column.

Changing the display of column headings

1. Click on the **Title** tab .
2. Select your title attributes.
3. If you want to have the same title styles for each column click on *<Apply to All>*.

Changing the display of column contents

1. Click on the **Font** tab .
2. Select the font attributes.
3. If you want to have the same style for each column click on *<Apply to All>*.

Sorting column contents

Sorting columns lets you organise the view display so that it is easier read. For example, if you have created a view that lists all of your articles by date, you might want to sort the dates so that the oldest article is at the top or bottom of the view.

1. Click on the Sort tab . The **Column Sort** dialogue box displays.

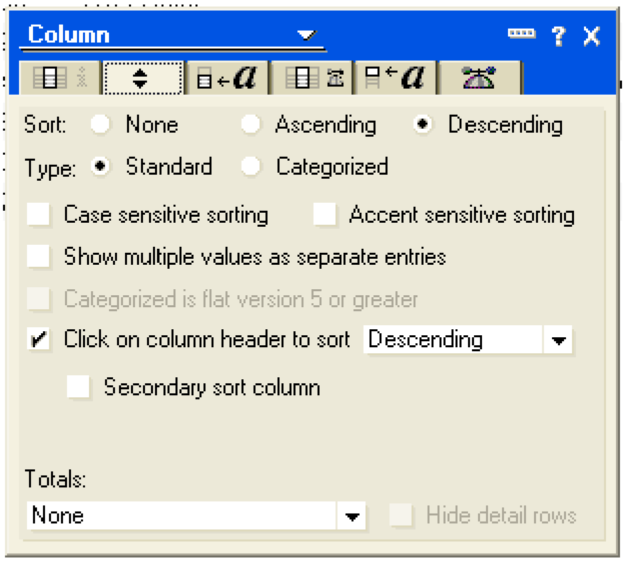


Figure 209: Column Sort dialogue box

2. Change your sort options as required.

- Sort:
  - *Ascending* - sorts in increasing order. That is numerical starting at the lowest number, then alphabetical, earlier dates before later dates.
  - *Descending* – sorts in decreasing order. That is, largest number down to smallest number, reverse alphabetical (Z-A), later dates before earlier dates.
- Type:
  - *Standard* – Repetitive information in a column is listed separately for each instance of that information. For example, if you are sorting the author column and there are several articles by the same author, the author name is repeated for each of their listed articles.
  - *Categorized* - groups same information in a column together. This is useful to get a list of articles by particular authors so that the author name is not repeated next to each listed article.

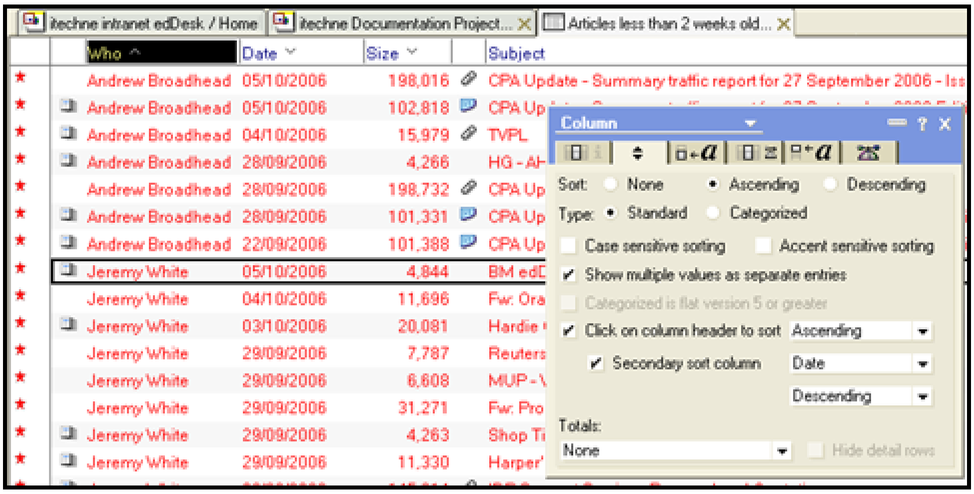


Figure 210: Author column is sorted with Type: Standard. Red colour just means that the article has not been read by the view creator.

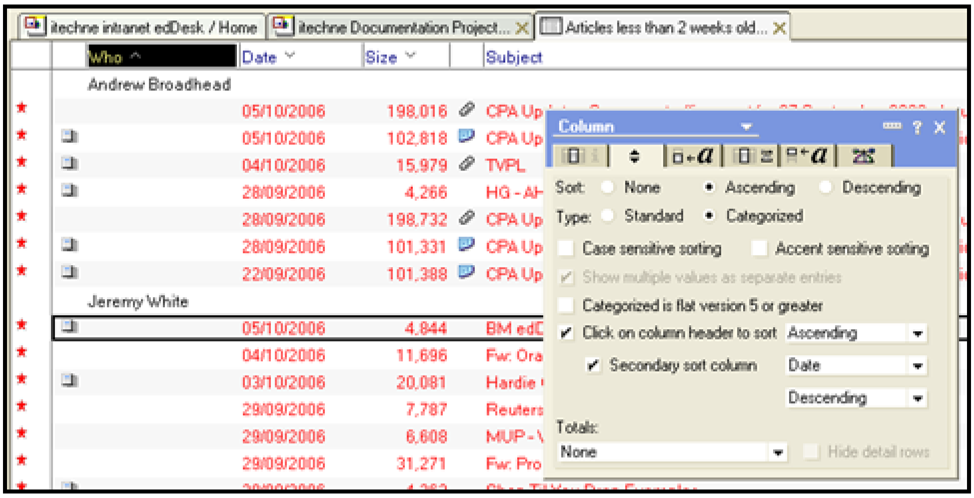


Figure 211: Author column is sorted with Type: Categorized. Red colour just means that the article has not been read by the view creator.

- *Case sensitive sorting* – sorts lowercase before uppercase.
- *Accent sensitive sorting* – sorts accented characters after non-accented characters.
- *Categorized is flat version 5 or greater* – don't worry about this!
- *Click on column header to sort* – Tick this option so that when you are using the view if you click on the column header you will change the sort order. This is useful!
- *Secondary sort column* – Lets you have multiple levels of sorting. For example, if your first column sorts by author, you might like a second column sorting by date, so that all the author's articles are listed in date order.

Saving a view after you have designed it

There are a few ways of saving your view from the Design pane. Do one of the following:

1. Press <*Ctrl*> + *s;* OR
2. Select the **File** menu then select *Save;* OR
3. Click on the close icon (the cross at the top right of the View tab name). You are prompted "`Do you want to save your changes?`" Click on <*Yes*>.

RENAMING A VIEW

Make sure your view names indicate the type of information displayed by that view. If you have modified your view since creating it, you may need to change its name.

1. Go to the view to be renamed.

   ⓘ see Going to your view for instructions.
2. Select the **Actions** menu.
3. Select *View Options*.
4. Select *Rename…*
5. The **Rename** dialogue box displays.

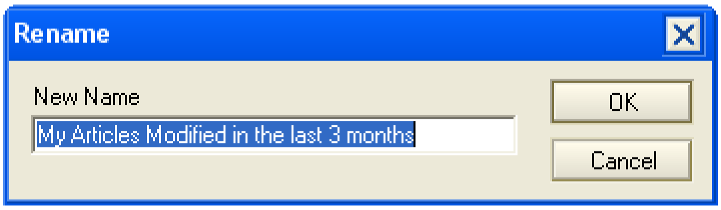


Figure 212: Rename dialogue box with old name highlighted

6. Type the new name for your view.
7. Click <*OK*>. Your view is renamed.

DELETING A VIEW

1. Go to the view to be deleted.

   ⓘ see Going to your view for instructions.
2. Select the **Actions** menu.
3. Select *View Options*.
4. Select *Remove View*.
5. You are prompted `This action may not be undone. Are you sure you want to delete the view (your view name) from this database?`
6. If you really want to delete the view click <*OK*>.

Appendix B: Creating simple Agents

Agents are simple programs that let you perform repetitious tasks quickly and simply. You can use agents to automate almost any task that you can perform manually in a database. You can also use search options to select only articles matching your criteria and then create agents to perform tasks with those matching articles.

For example, you might want staff to receive an email each week that lists all active articles that have not been modified in the past year. You might also want a daily update of articles that have been created or modified in the past day.

Agents can be:

- **private** - used only by you; or
- **shared** - able to be used by other people who use your database.

> **No technical knowledge? No problem!**
>
> You do NOT need any programming or technical knowledge to create simple agents and you may create as many agents as you like.

OBJECTIVES

By the end of this chapter you should be able to:

- create simple agents
- create an agent using a worked example
- test your agent
- use your agents
- view at a list of your agents
- edit an agent
- delete agents (that you created) that you no longer need.

WHERE TO GO FOR MORE HELP, OR FOR AGENTS REQUIRING PROGRAMMING SKILLS

Complex agents and agents requiring programming skills are outside the scope of this User Guide. If you need to use complex agents consider the following two options:

- see your system administrator – they may be able to write the agent for you. Remember, you must know what you want the agent to do (you don't need to know how to do it though). Your system administrator may also be able to refer you to useful reference materials.
- refer to the Lotus Notes online help – Context Sensitive Help is represented by a question mark in the right top corner of dialogue boxes. Click on the question mark to see help about the feature you are currently at. If you do not have a dialogue box open press <F1>.

CREATING AGENTS

> **Important**
>
> This section does NOT cover each option available when you create agents. Only very simple agents, requiring no programming knowledge are discussed. If you need to use more complex agents see your system administrator.

1. Open the database in which you want to create the agent.
2. Go to the **Create** menu.
3. Select *Agent…*
4. The **Agent properties** dialogue box and the **Programmer's** pane display.

> **Note**
>
> You must select criteria from BOTH the Agent properties dialogue box and the Programmer's pane to create a working Agent.
>
> The Agent properties dialogue box contains the name, description and details the conditions the agent will run under – ***when*** and the ***how*** the agent will do something. The Programmer's pane contains the actions – ***what*** the agent will do.

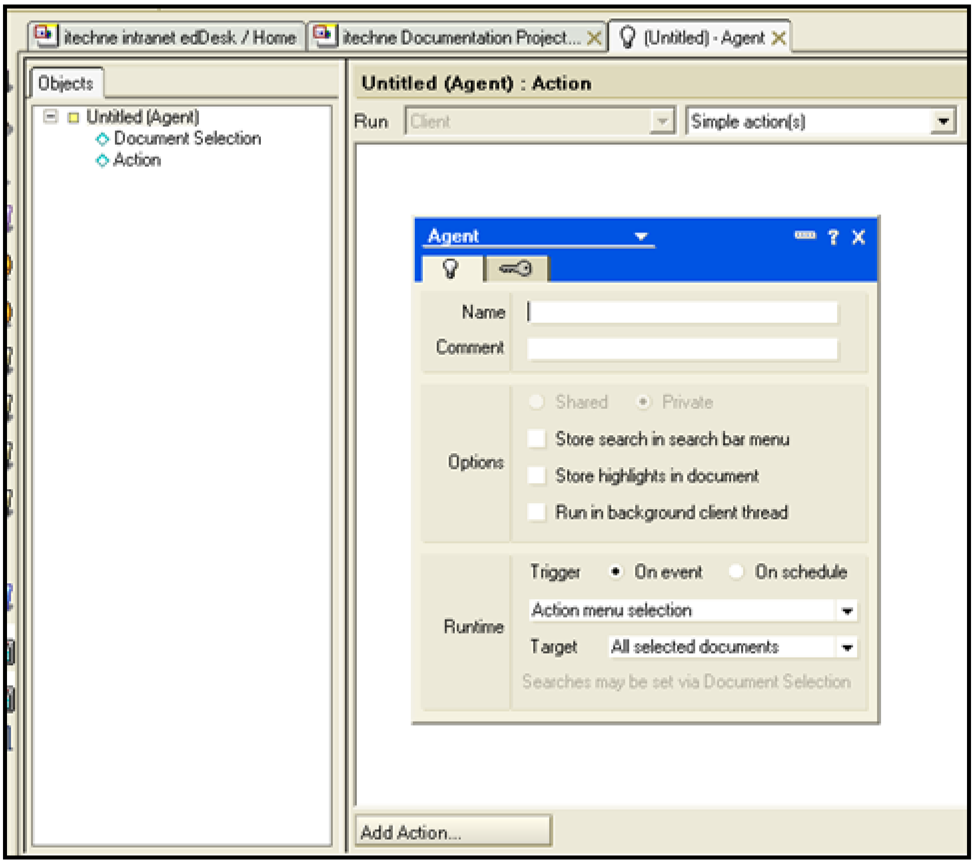


Figure 213: New agent showing Agent properties dialogue box (in foreground) and Programmer's pane (in background).

Agent properties dialogue box

1. Name: Enter a name for your agent.
2. Comment: Enter a description of the agent. The comment appears in a list of agents.

3. Options: You may notice that some of the options are greyed out (unavailable). The availability of options depends on your level of access to the database in which you are creating the agent.

    - *Shared / Private* – If you want to share this agent with other people who use your database click on the *Shared* option. If you are the only person who will run this agent click on *Private*.
    - *Store search in search bar menu* – if your agent is going to search for text in articles you can display your search criteria in the Search bar.
    - *Store highlights in document* – if your agent is going to search for text in articles you can highlight the matching text in the articles.
    - *Run in background client thread* – if you select this option your agents will not be seen by a user. However if you are using agents to email people this is OK! Don't worry too much about this option.

1. Runtime: You need to select a "trigger" for your agent. Triggers cause the agent to be run. You can select either:

    - *On event* – select a particular event, from the dropdown list under the trigger field, which will trigger the agent. ⓘ see below, Runtime trigger: On event for more detail about the *On event* options.
    - *On schedule* – schedule the time, day or frequency that the agent will run. ⓘ see below, Runtime trigger: On schedule for more detail about the *On schedule* options.

Runtime trigger: On event

1. You now need to select the event that will run your agent. The following options are available:

    - *Action menu selection*: The agent will be listed as an option in the **Action** menu. When you want to run the agent you need to go to the **Action** menu and select the agent. This is useful if you want to run the agent at varying intervals.

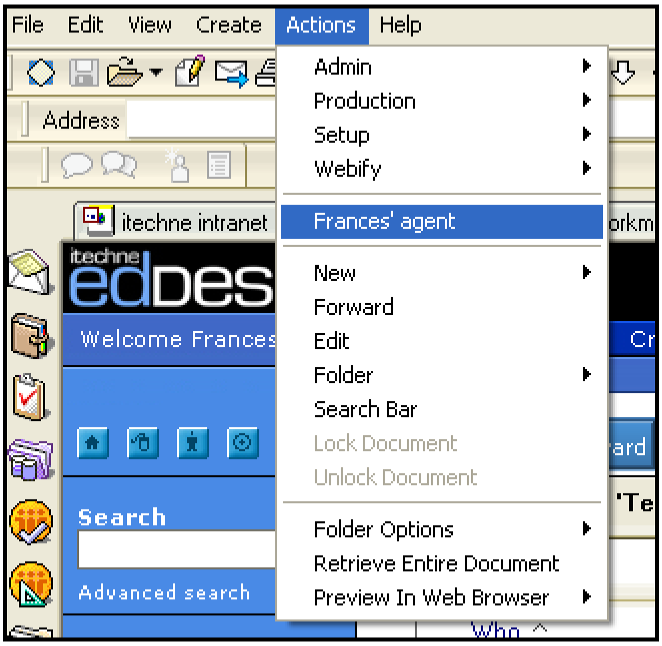


Figure 214: Action menu selection - the agent using this trigger is "Frances' agent".

- *Agent list selection*: For agents that are "called" by other agents – that is, other agents use this agent. DON'T WORRY ABOUT THIS ONE.
- *Before new mail arrives*: Works on every item of mail before it is received in your mailbox. Can be used to move incoming mail to a folder. Use this option with care.
- *After new mail has arrived*: Works on newly received mail. Particularly useful if you have just sent out many emails and people are responding to them – for example a client survey. You can use this option to send automated replies.
- *After documents are created or modified*: DON'T WORRY ABOUT THIS ONE. May be used for workflow tasks, but the edDesk article workflow tab replaces the need for this option.
- *When documents are pasted*: DON'T WORRY ABOUT THIS ONE. Used for articles that must be modified when they are pasted into a database.

2. Target: select the articles on which the agent will be run. Your options in the Target field vary depending on the Runtime trigger you selected. For example, the event runtime triggers "Before new mail arrives" and "After new mail has arrived" only act on mail items – not on articles. All available options are listed below.

   - *All documents in database*
   - *All new and modified documents*
   - *All unread documents in view:* You select article search criteria and your agent only acts on articles matching those criteria.

- *All documents in view*: You select article search criteria and your agent only acts on articles matching those criteria.
- *All selected documents*.
- *None*.

3. Click on the *close* icon  (top right of the dialogue box) when you have entered your agent properties.
4. The **Programmer's pane** is displayed.

Runtime trigger: On schedule

1. If you have selected *On schedule* as your runtime trigger you must select the frequency of the agent's running.
    - *More than once a day*: Only used for very high priority items. If you schedule very frequent runs you could slow your server!
    - *Daily*: For important items that you only need to know about once a day. itechne uses this for sending out a list of articles that have been modified or added in the day.
    - *Weekly*: For routine tasks, particularly useful for summary reports so you can see what has happened during the week.
    - *Monthly*: For low priority tasks. For example, archiving articles, distributing monthly newsletters.
    - *Never*: DON'T WORRY ABOUT THIS ONE.
2. Click on <*Schedule…*>. The **Agent Schedule** dialogue box displays.

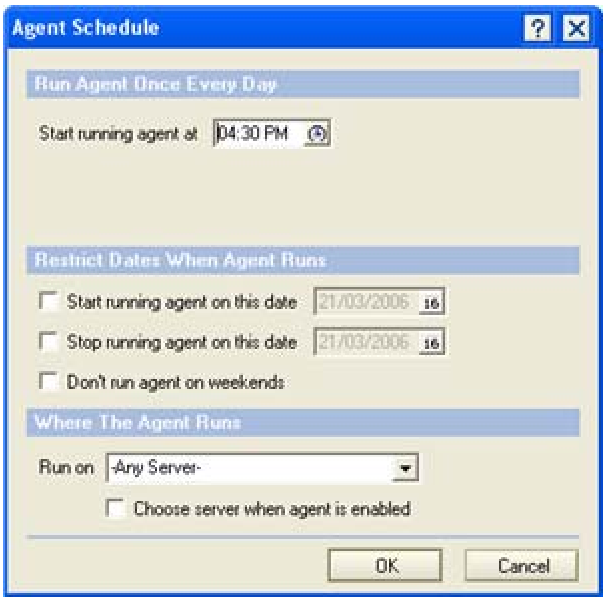


Figure 215: Agent Schedule dialogue box, where you enter the schedule by which to to run your Agent.

3. Use the **Agent schedule** dialogue box to specify the schedule by which your agent is run. Remember that agents do take up system memory, and complex agents, or agents running on many articles, will slow your

database down when they run. Specify a sensible schedule that has minimum impact on other users.

- Run Agent Once Every Day: Select the time your agent is to run. It will run at the same time each day (until you change the time). *Start running agent at*: If your agent is system intensive (takes a lot of memory, or will have to search through a lot of articles) select a time when you know that there are fewer people using your database.

- Restrict Dates When Agent Runs: These options are used to restrict the dates the agent runs. If you only want to use an agent for a particular period or not on the weekends you need to select your criteria here.

  Start running agent on this date. If you want to start running your agent on a particular date click on the checkbox then enter the first date you want the agent to run. If you are not sure of the date format click on the calendar icon next to the date. A calendar is displayed. Select the required date.

  Stop running agent on this date. If you want to stop running your agent on a particular date click on the checkbox then enter the last date you want the agent to run. If you are not sure of the date format click on the calendar icon next to the date. A calendar is displayed. Select the required date.

  Don't run agent on weekends. If you don't want your agent to run on weekends, check this option.

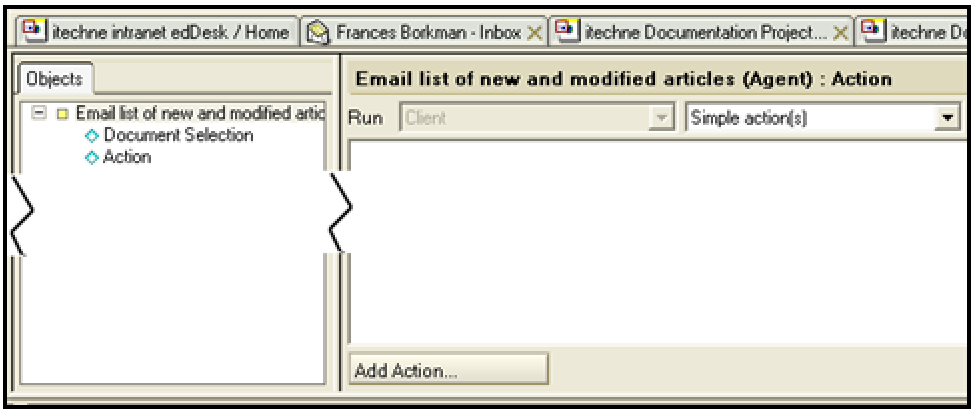
- Where the Agent Runs: Only change this option if you know which servers your database uses. Most people will leave this option at -*Any Server*-.

4. Click on <*OK*> when you have set your Agent Schedule.
5. Target: select the articles on which the agent will be run. On schedule has only two options:
   - *All documents in database*
   - *All new and modified documents*
6. Click on the close icon  (top right of the dialogue box) when you have entered your agent properties.
7. The **Programmer's pane** is displayed.

Programmer's pane

The **Programmer's pane** is where you select the actions done by the agent. That is, ***what*** the agent does. You can also specify which articles are to be selected.

The Programmer's pane is divided into two panes – the left pane is the **`Objects`** tab. There are two available option s - *Document Selection* and *Action*. *Document Selection* is not always used, but it is where you can specify that the agent run on only a particular set of articles. Use *Document Selection* if the **Agent properties** dialogue box did not allow sufficiently refined article selection criteria. Action is always used and is the selected option when you first enter the **Programmer's pane**.



Action object

1. Click on <*Add Action…*>.
2. The **Add Action** dialogue box displays.

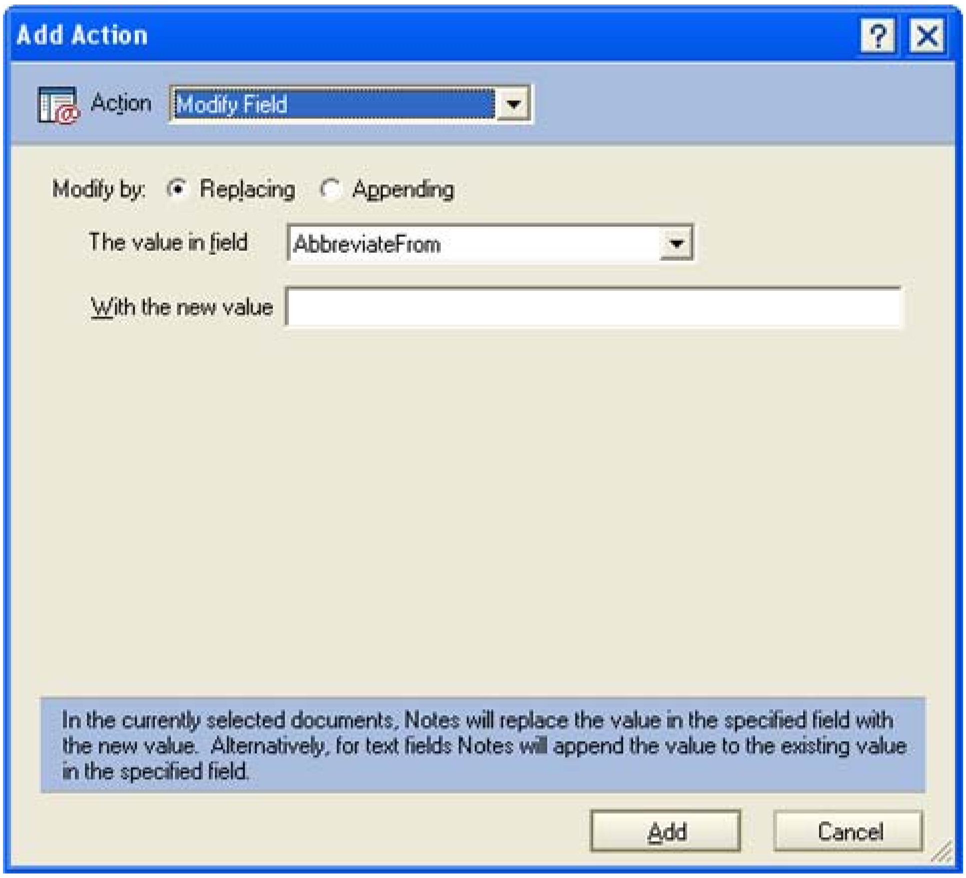


Figure 216: Add Action dialogue box on entry, showing default action of "Modify Field".

3. Action: The default action is *Modify Field*. Click on the dropdown list to see a list of available actions. Look at the bottom of the dialogue box - outlined in blue is a description of what the selected action does.

The options for the actions change as you select different actions. Compare Figure 216, above, with the **Add Action** dialogue box below (after a different action has been selected).

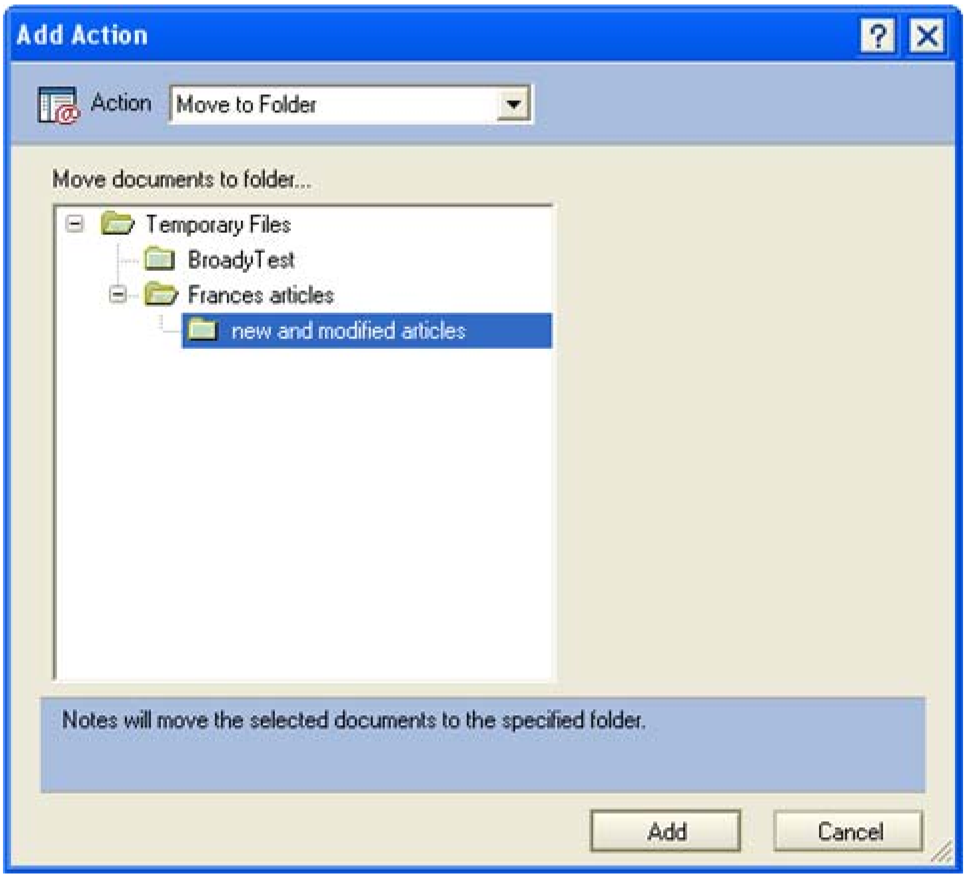


Figure 217: Add Action dialogue box with a the Action "Move to Folder" selected. This action moves articles specified in the Agent properties dialogue box to the selected folder.

4. Select the required action and the parameters that your selected action needs to be completed. (In Figure 217, above, the parameter is to select the folder to which you want to move your articles).

> **Some Actions have no parameters.**
>
> If there are no parameters for an action the blue action description box will contain "This action does not require any parameters." There will be nothing for you to select other than the action itself.

5. Click on <*Add*>. Your action is added to the agent and appears in the **Programmer's pane**.

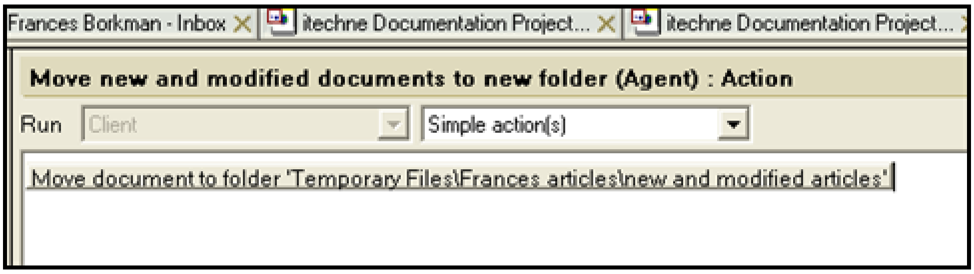


Figure 218: Action ""Move to Folder" now added to programmer's pane.

6. If you want to add more actions for your agent to perform repeat steps 3 to 5. Actions must be added in the order that you want them to be run.

Document Selection object

1. Click on *Document Selection* in the **`Objects`** tab.
2. The **Programmer's pane** displays as below:

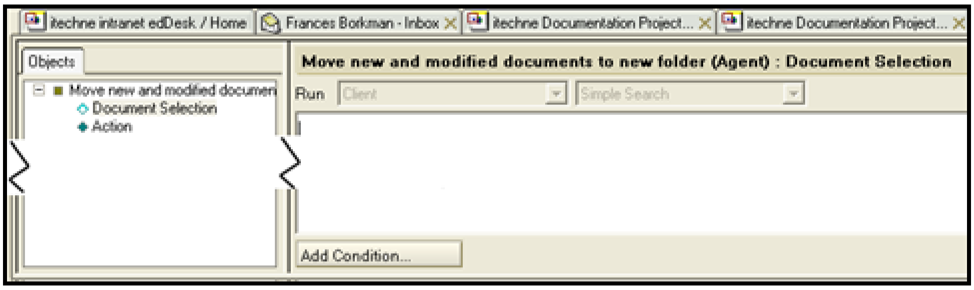


Figure 219: Document Selection object selected in the Programmer's pane.

3. Click on <*Add Condition…*>. The **Add Condition** dialogue box displays. ⓘ see section 5.6i: Conditions for details on specifying the most commonly selected conditions.

SAVING YOUR AGENT

Do **one** of the following:

4. Press <*Ctrl*> + *s;* OR
5. Select the **File** menu then select *Save;* OR
6. Click on the close icon (the cross at the top right of the Agent tab name). You are prompted "`Do you want to save your changes?`" Click on <*Yes*>.

TESTING YOUR AGENT

It is important to test your agent to make sure that it runs correctly.

If your agent is going to manipulate articles, or email you a list of new or modified articles then create at least one new article so that you receive some indication that the agent is running correctly.

Have a new or modified article ready
It is best to ensure that there is at least one new or modified article in your database, so that you can see exactly what the email will look like. If necessary create a dummy article (you only need to complete the mandatory fields in the **`Basics`** tab).

1. Close the agent (click on the cross at the top right of the **`Agent`** tab name).
2. Go to the **View** menu.
3. Select *Agents*. A list of all of your agents is displayed.

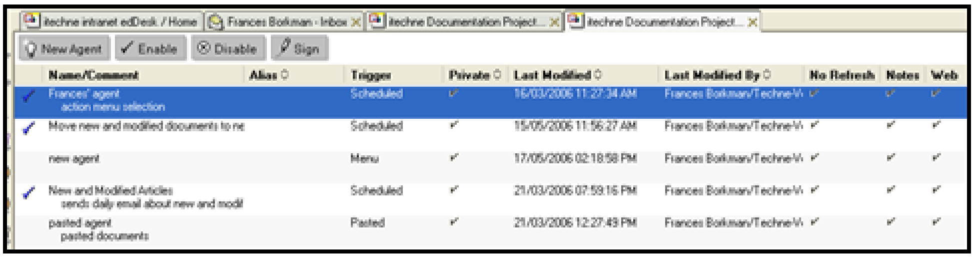


Figure 220: List of all of my agents.

4. Highlight the agent that you want to test.
5. Go to the **Agent** menu.
6. Select *Test*.
7. After the agent has been tested a **Test Run Agent Log** displays.

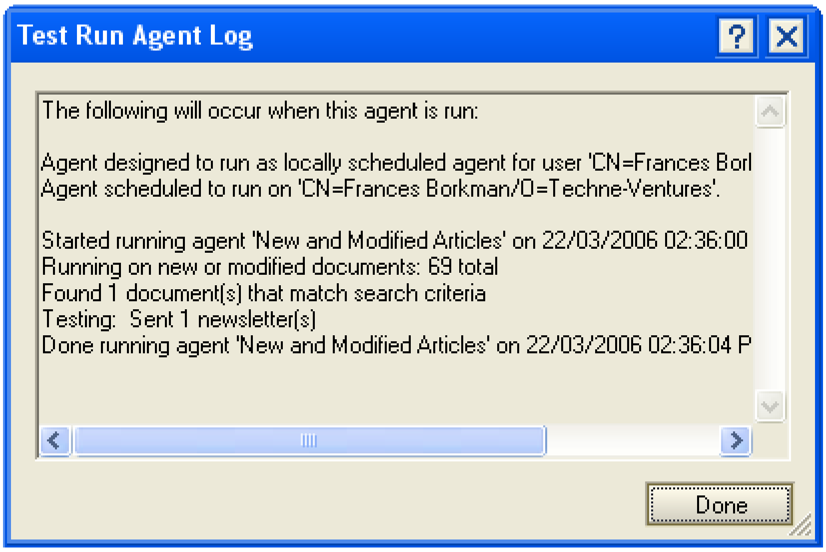


Figure 221: Test Run Agent Log

8. Read the **Test Run Agent Log** carefully as it tells you about the total number of articles in your database, how many meet the criteria specified by the agent and what will happen to those articles. In the Log above a newsletter summary will be sent to recipients specified in the programmer's pane.
9. Click on <*Done*>.

Deleting and Disabling Agents

Only delete agents that you have created and that only you run! If you are not sure that you are the only person who uses an agent disable it instead of deleting it.

Delete – permanently removes the agent from the database.

Disable – the agent is still in the database, but it cannot be run.

Deleting an agent

1. Go to the **View** menu.
2. Select *Agents*. The **Agents list** is opened.

3. Select the agent to be deleted.
4. Press <*Delete*>. You are prompted `Delete agent '(agent name)' permanently from the database?`
5. Click <Yes>.

Disabling an agent

1. Go to the **View** menu.
2. Select *Agents*. The **Agents list** is opened.
3. Select the agent to be disabled.
4. Click on <*Disable*>.

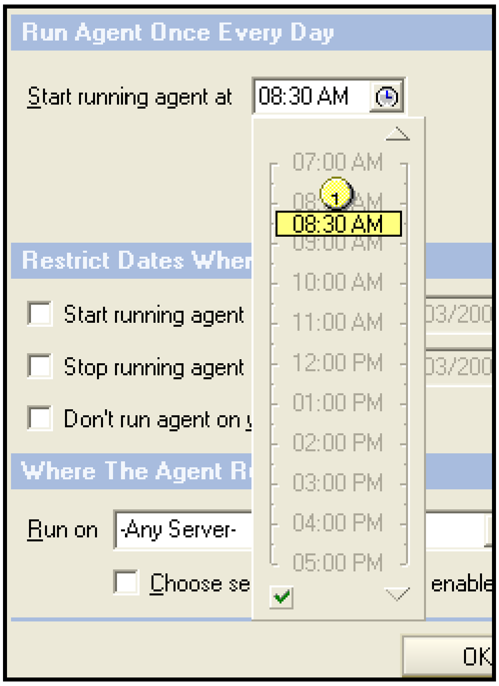
WORKED EXAMPLE – AN AGENT TO SEND A DAILY EMAIL THAT LISTS NEW AND MODIFIED ARTICLES

This agent sends an email each weekday morning (at 8:30am) to other people in an organisation. The email lists all new and modified articles in a database. Each new and modified article has a link so that people can open the article. Other information displayed is the article author, modification or addition date, article size (in bytes) and article subject.

1. Open the database in which you want to create the Agent.
2. Go to the **Create** menu.
3. Select *Agent*.

Agent properties dialogue box

4. Name: Type "*New and Modified Articles*"
5. Comment: Type "*sends daily email about new and modified articles*"
6. Trigger: Select *On schedule.*
7. Select *Daily* from the dropdown list.
8. Click on <*Schedule…*>
9. Start running agent at: Click on the clock icon in this field.
10. Scroll through the list until the time displayed is *08:30AM*.



11. Click away from the list. You are returned to the **Agent Schedule** dialogue box.

12. Don't run agent on weekends: Select this.

13. Click <*OK*>.

14. Target: select *All new and modified documents*.

15. Close the **Agent Properties** dialogue box.

Programmer's pane

16. Look down at the bottom of the pane. Click on <*Add Action…*>.

17. Action: Click on this list and select *Send Newsletter Summary*.

18. To: Type the email addresses of the people to whom you are sending the list of new and modified articles. If you have a group contact list, you may type its title. For example, #staff@company.com.

19. Subject: Type *New and Modified Articles*.

20. Send the following message: This field is for text that appears in the body of an email. Type *The following articles are new or have been modified:*

21. Include summary for each document using view: Make sure this field is ticked. Then select *All Documents*. Your email will include information displayed in the view "All Documents" (a very useful view!).

22. The **Add Action** dialogue box should look like the one below. (The address of the recipients will be different)

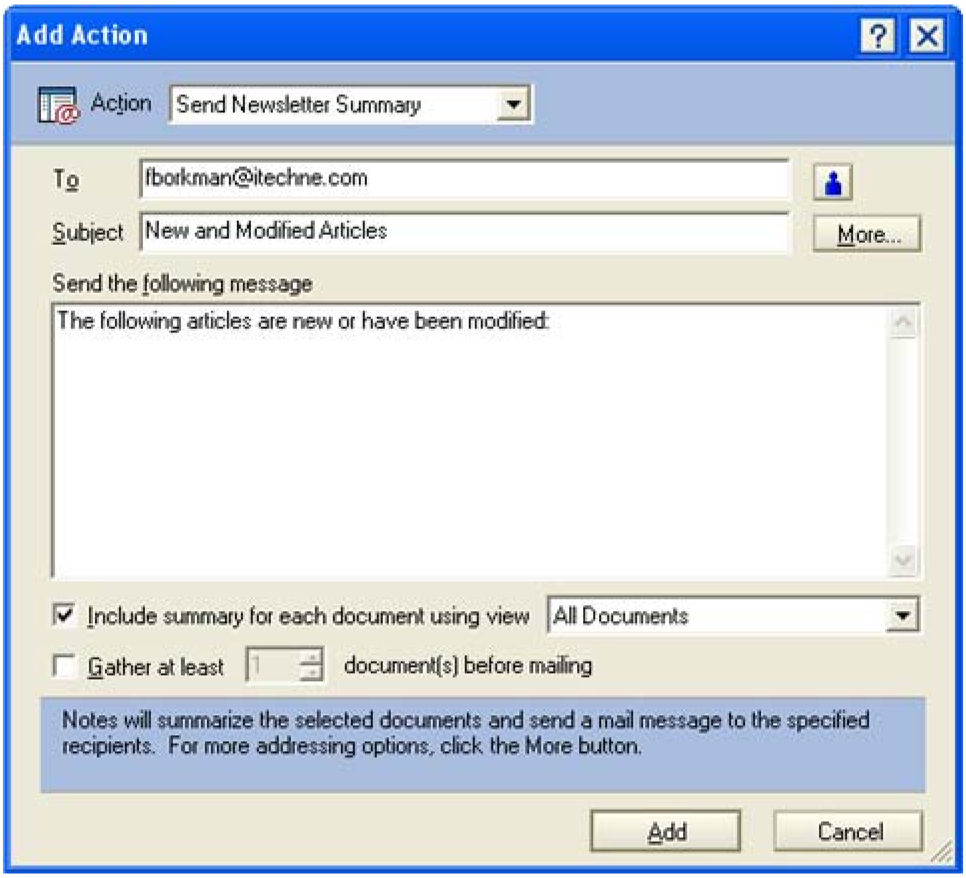


Figure 222: Completed Add Action dialogue box as per the instructions in this example.

23. Click on *<Add>*.

24. Your action is now added to the agent. The **Programmer's pane** is displayed as below.

Figure 223: Programmer's pane after you have completed the Add Action dialogue box.

25. Save your agent by either:

- going to the **File** menu then selecting *Save* OR
- pressing *<Ctrl>+s*

26. Close the agent. (Click on the cross in the agent's tab).

Test your agent

Have a new or modified article ready

It is best to ensure that there is at least one new or modified article in your database, so that you can see exactly what the email will look like. If necessary create a dummy article (you only need to complete the mandatory fields in the **Basics** tab).

27. Go to the **View** menu.
28. Select *Agents*.
29. Highlight the agent you want to test.
30. Go to the **Agent** menu.
31. Select *Test*.
32. Read the **Test Run Agent Log** carefully to make sure that your agent has run as expected. Make any required modifications to your agent.

Appendix C: Using Webforms

WEBFORMS

Webforms are used by your clients to review articles that you are publishing on their behalf. They are particularly useful for independent publishers, such as Hardie Grant.

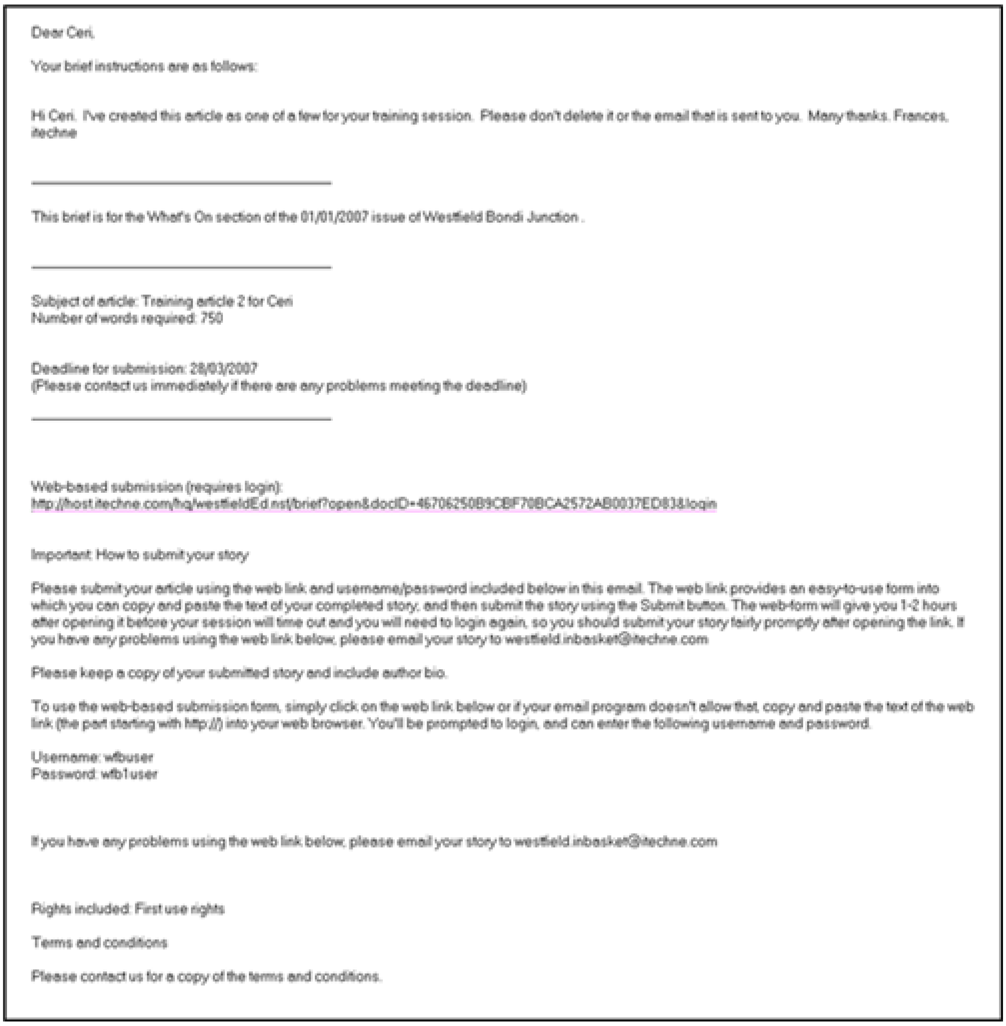
This appendix instructs you in the procedures involved in using webforms, from the author receiving a brief emailed through edDesk, through to the editors and the client reviewing the edited article.

Webforms involve using a web browser for submission and review of articles. The address of the website you need to use for article submission is given in the briefing email to the author. The address of the review site is given to you by itechne – you then give that address to the client who needs to review their articles.

Author tasks

This is written from the perspective of the author.

1. Open the briefing email. The email is displayed, containing details of the brief and instructions follow to submit the article.



Dear Ceri,

Your brief instructions are as follows:

Hi Ceri. I've created this article as one of a few for your training session. Please don't delete it or the email that is sent to you. Many thanks. Frances, itechne

This brief is for the What's On section of the 01/01/2007 issue of Westfield Bondi Junction .

Subject of article: Training article 2 for Ceri
Number of words required: 750

Deadline for submission: 28/03/2007
(Please contact us immediately if there are any problems meeting the deadline)

Web-based submission (requires login):
http://host.itechne.com/hq/westfieldEd.nsf/brief?open&docID=46706250B9CBF70BCA2572AB0037ED83&login

Important: How to submit your story

Please submit your article using the web link and username/password included below in this email. The web link provides an easy-to-use form into which you can copy and paste the text of your completed story, and then submit the story using the Submit button. The web-form will give you 1-2 hours after opening it before your session will time out and you will need to login again, so you should submit your story fairly promptly after opening the link. If you have any problems using the web link below, please email your story to westfield.inbasket@itechne.com

Please keep a copy of your submitted story and include author bio.

To use the web-based submission form, simply click on the web link below or if your email program doesn't allow that, copy and paste the text of the web link (the part starting with http://) into your web browser. You'll be prompted to login, and can enter the following username and password.

Username: wfbuser
Password: wfb1user

If you have any problems using the web link below, please email your story to westfield.inbasket@itechne.com

Rights included: First use rights

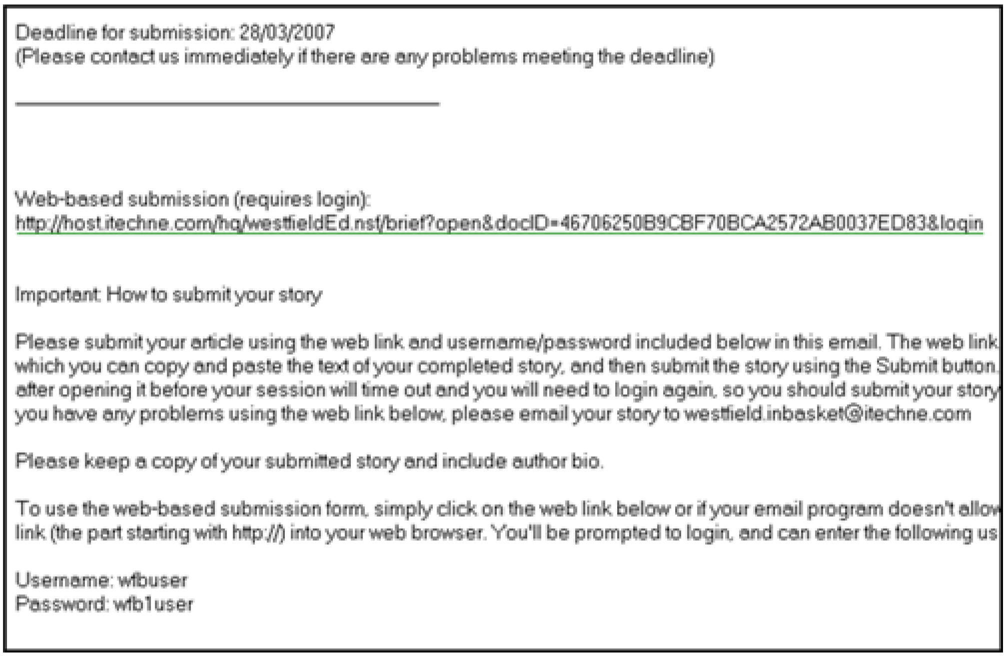
Terms and conditions

Please contact us for a copy of the terms and conditions.

Figure 224: briefing email showing all text of email

2. Write your copy in whatever application you usually use for stories.

3. Web-based submission: When you are ready to submit the story click on the link under the **Web-based submission** heading.



Deadline for submission: 28/03/2007
(Please contact us immediately if there are any problems meeting the deadline)

Web-based submission (requires login):
http://host.itechne.com/hq/westfieldEd.nsf/brief?open&docID=46706250B9CBF70BCA2572AB0037ED83&login

Important: How to submit your story

Please submit your article using the web link and username/password included below in this email. The web link
which you can copy and paste the text of your completed story, and then submit the story using the Submit button.
after opening it before your session will time out and you will need to login again, so you should submit your story
you have any problems using the web link below, please email your story to westfield.inbasket@itechne.com

Please keep a copy of your submitted story and include author bio.

To use the web-based submission form, simply click on the web link below or if your email program doesn't allow
link (the part starting with http://) into your web browser. You'll be prompted to login, and can enter the following us

Username: wfbuser
Password: wfb1user

Figure 225: Briefing email showing details of the submission instructions

4. A browser window opens, with a login screen.

Note

If a browser window does not open, then you need to open a browser window and copy and paste the link into the URL of the browser.

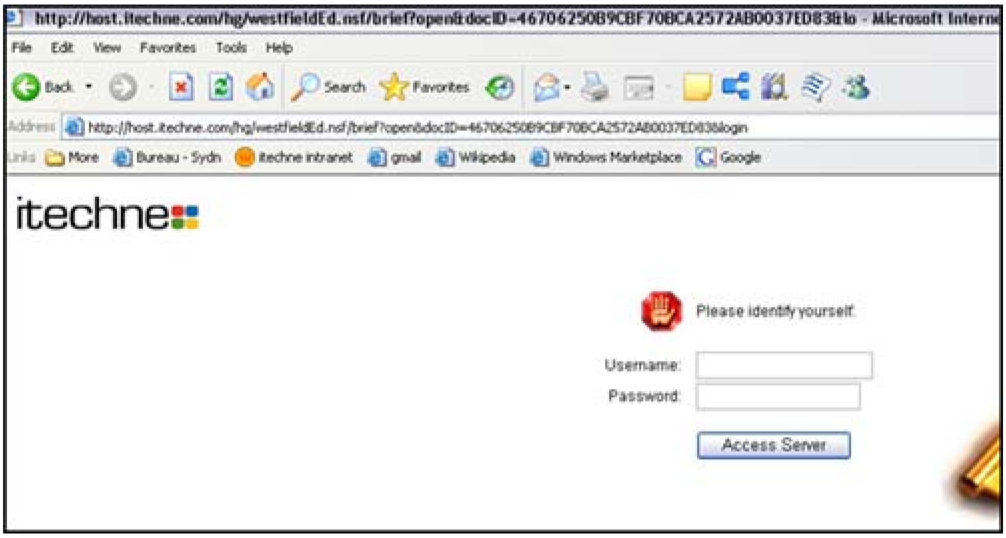


Figure 226: Login screen for webform - used in article submission

5. Type in the username and password given to you in the briefing email. The username and password are case sensitive.

6. Click on <*Access Server*>.

7. The webform for article submission displays.

Figure 227: Webform in which to copy and paste your article

8. **Headline**: type the headline for your article.

9. **Intro**: type the introduction for your article.

10. Copy and paste your article into the area below the **Intro**:

    You can do many simple word processing functions here – such as bold, italic, indent, outdent, bulleted lists, numbered lists.

    If you've used a wordprocessing application such as Word, your formatting will be pasted in as it appeared in Word.

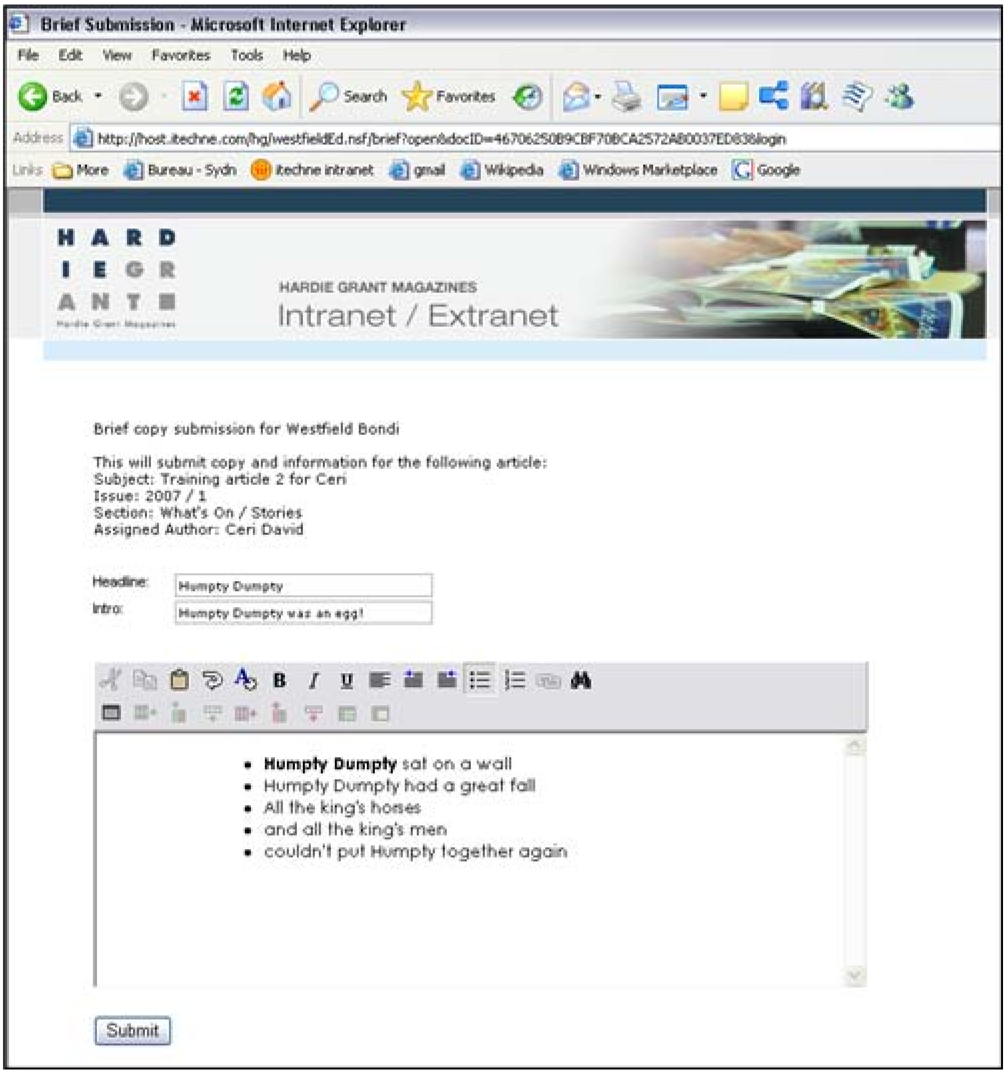


Figure 228: Example of an article ready for submission. Formatting has come across when pasting from Word.

11. Click on <*Submit*> when you are ready to submit your article.

12. A confirmation message appears, thanking you for your submission.

Figure 229: Confirmation message that appears after you click on <Submit>.

Editor tasks

Submitted articles are listed in the **Filed Copy** view, available from the **`Editing`** tab. When an article is submitted, edDesk "replicates" this around the network – meaning that it can take several minutes for a submitted article to be listed in the Filed Copy view. Be patient – it will appear.

1. Click on the **`Editing`** tab.
2. Click on **Filed copy**.
3. All articles with a copy status of "Filed" are listed.

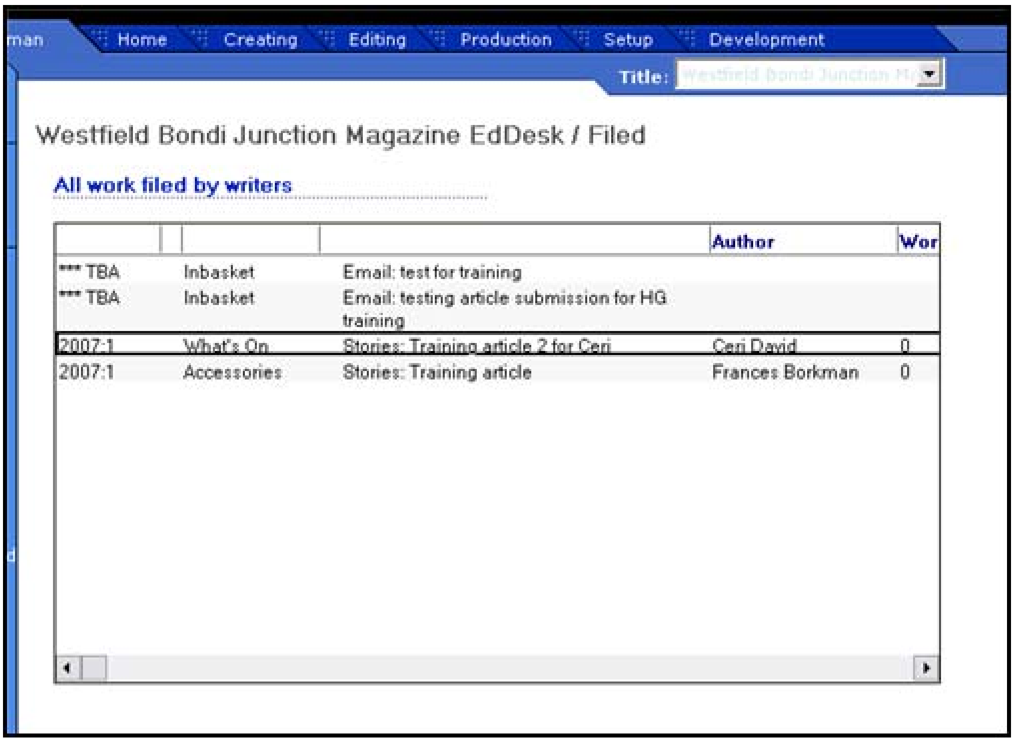


Figure 230: Filed copy view, with the article that was submitted by the author outlined with the black box.

4. Click on the article you need to edit. The article opens.
5. Click on <*Edit*>.

6. Make any required changes to the text and/or formatting.
7. Go to the **`Workflow`** tab.
8. Change the `Copy status` to reflect what part of the editing process the article is up to.
9. <*Save*> the article.

Save new version

If you want to keep a copy of the article, as it was originally submitted by the author, and a copy with any edits you have made, you can use <*Save new version*>.

If the author has submitted their article by emailing a Word document you can attach that document to the article in a different manner.

1. When you have edited the article, click on <*Save new version*>.
2. The article is saved and closed.
3. Look at the **Filed copy** view (from which you entered the article you just edited).
4. The article is now listed twice; the edited version is the "parent" and has an arrow next to its subject; the original article is a "child" of the edited article.

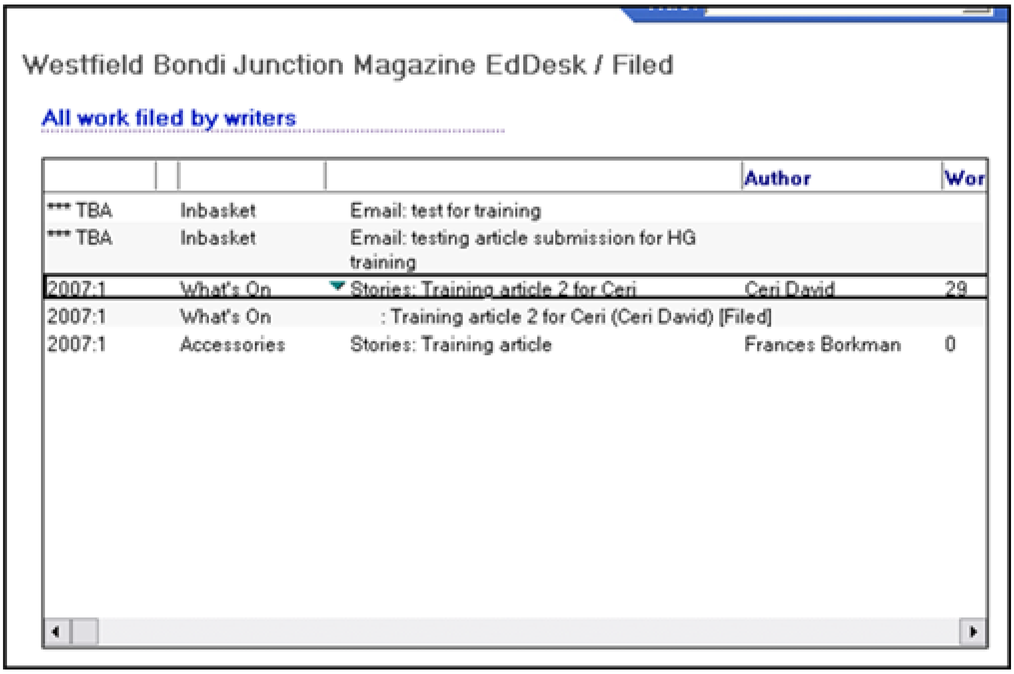


Figure 231: Edited version is the one with the arrow next to the subject, original version is indented underneath.

Client review of edited articles

When the article has a copy status of "Copy ready" it is available for the clients to review at an approval site. itechne set up the approvals site, and then you (at Hardie Grant) let itechne know the logins and passwords you want. You then give the site address and login details to the client.

This section is written from the perspective of the client.

1. Go to the approvals address. Your publisher will give you this address.
2. Login in to the approvals site.
3. A list of all articles with a copy status of Copy ready is displayed, as below.

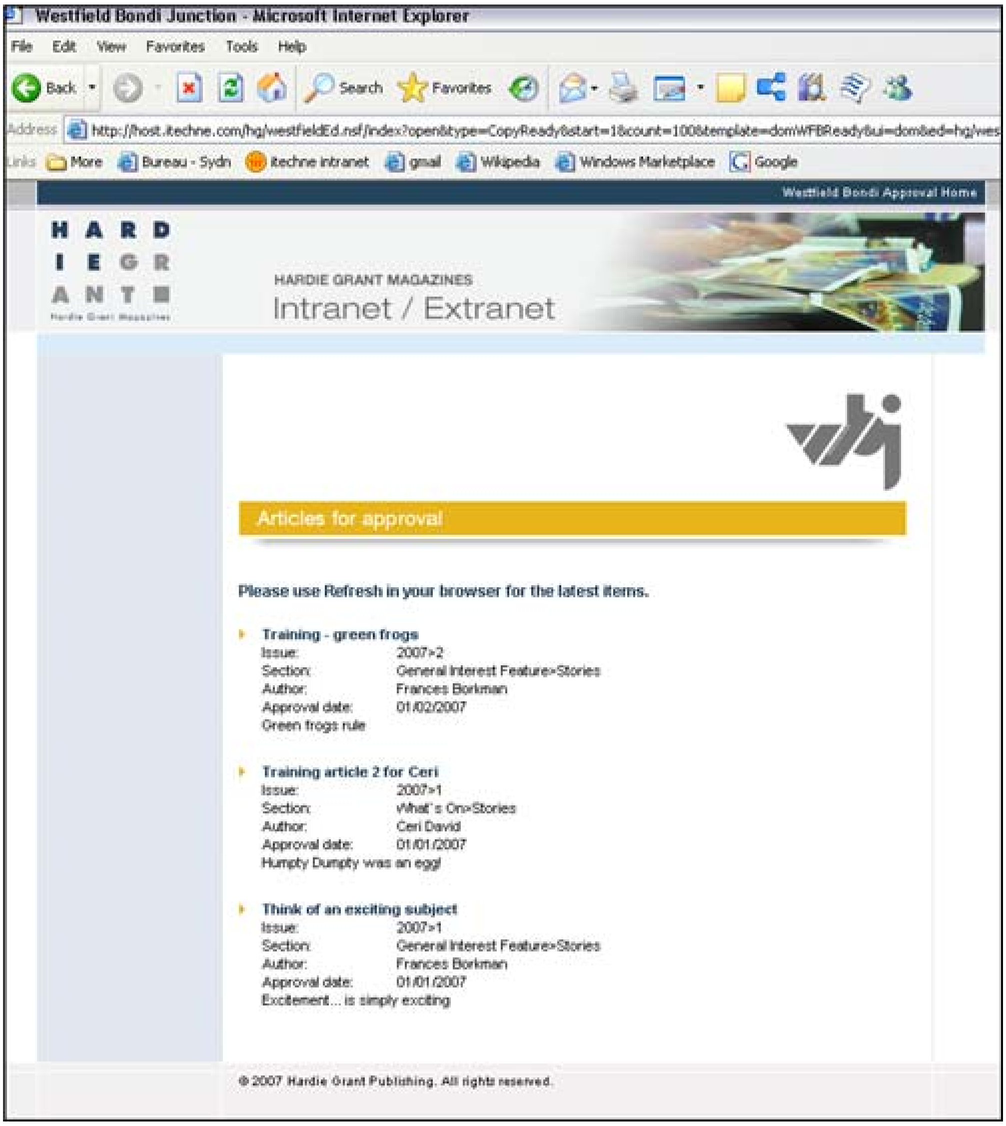


Figure 232: Client site, listing articles submitted for approval

4. Information displayed about each article is:

- Subject (this is in bold with an arrow next to it).
- Issue: information is taken from the Volume and Number fields in the Basics tab of the article.
- Section: information is taken from the Section / Subsection fields in the Basics tab of the article.
- Author: information is taken from the Author field in the Brief tab of the article.
- Approval date: taken from the Issue date of the publication (in the Setup tab, Production schedule).

- Intro: Text is taken from the Intro: field in the Copy tab of the article. If the author has submitted the article using the webforms, this was entered into the Intro field of the webform (and from there edDesk put it into the Intro field in the Copy tab of the article).

5. Click on the Subject.
6. The **Approval submission** page displays.

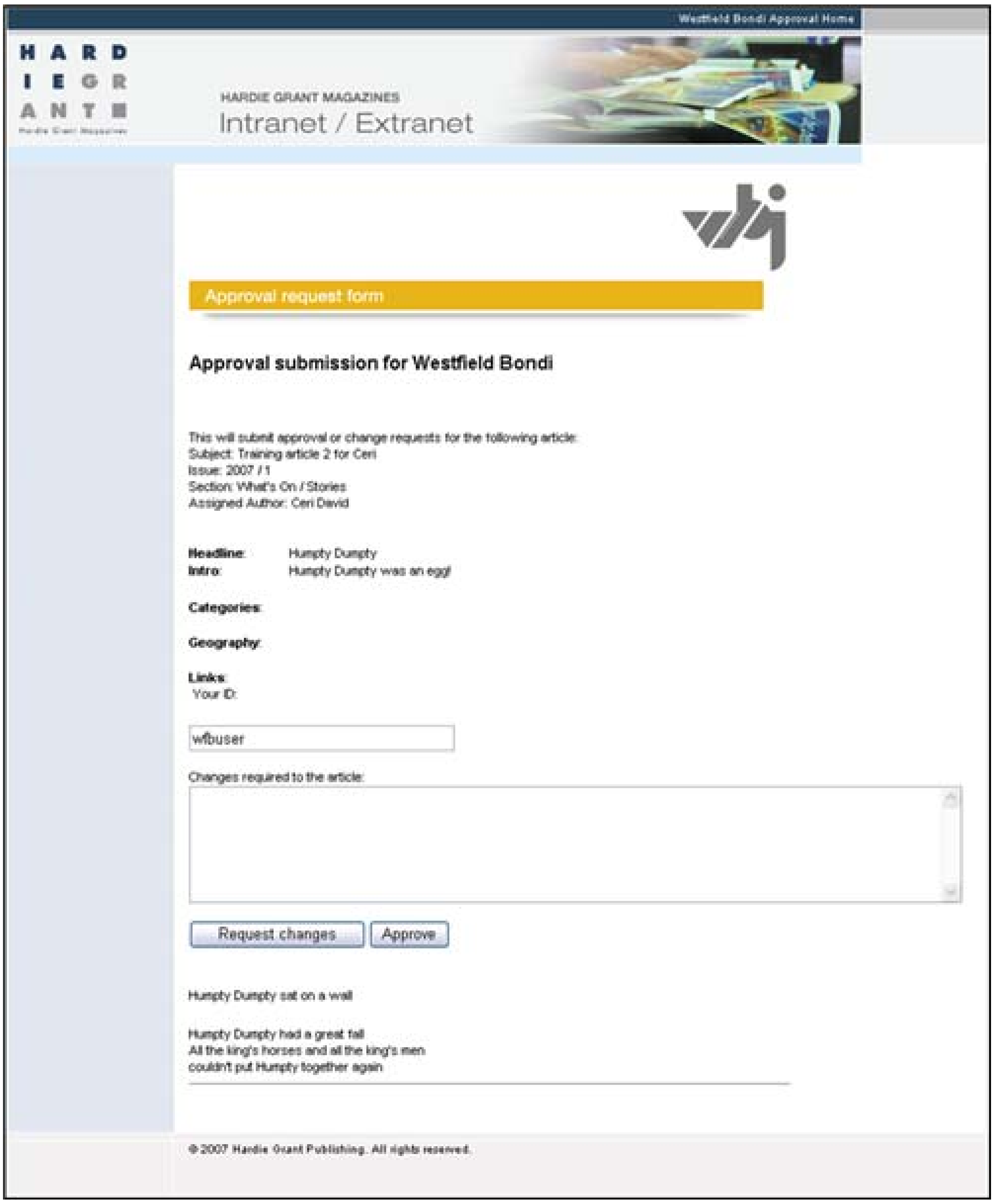


Figure 233: Webform article approval

7. The article details display. The article text is at the bottom of the page.
8. If you would like changes to be made, type those changes into the Changes required to the article field. Click on <*Request changes*>.
9. If the article does not need any changes, click on <*Approve*>.

Appendix D: Troubleshooting and FAQs

TROUBLESHOOTING

I marked an article for deletion by accident

It is easy to accidentally mark an article for deletion. It is also easy to undo the deletion!

How you did it (relax it's very easy to do)

1. Opened the article. Did not select <*Edit*>.
2. Pressed <*Delete*>.
3. Closed the article, either by clicking <*Cancel*> or by closing the window tab.
4. Your article has been marked with a cross.

Figure 234: Article marked for deletion is indicated with a cross.

How to undelete it (this is also easy)

Do one of the following:

1. Select the **Edit** menu (at the top of your screen). Select *Undo Delete* OR
2. Press <*Ctrl*>+z.

I really did delete an article

You need to contact your System Administrator as quickly as possible. If your deletion is replicated your article may need to be restored from backup versions of your database.

It's always best to change the Copy status to Cancelled instead of deleting an article. ⓘ see section 15.2: Cancelling an Article for more information.

I want to print a view, but cannot get the Print View or Print Documents dialogue boxes to display

Some views require you to select a document before selecting print. You tell edDesk to print the entire view when the dialogue box is displayed.

1. Click once on any article listed in the view. The **Print View** dialogue box opens.
2. What to Print – Click on *Selected view*.

3. Click on the **`Page Setup`** tab.
4. Orientation – Click on *Landscape*.
5. Click <*OK*> to print, or <*Preview…*> to have a preview and check that your print settings are correct.

FREQUENTLY ASKED QUESTIONS

Why are Volume and Issue fields pre-filled in my new article?

If you have an article selected in the content view then added a new article, the Volume and Number fields in the new article are pre-filled with the information from the article you had selected.

In the diagram below the selected article is dated 07/31/2004 (that is, 31 July 2004) – or Volume 2004, Number 7.

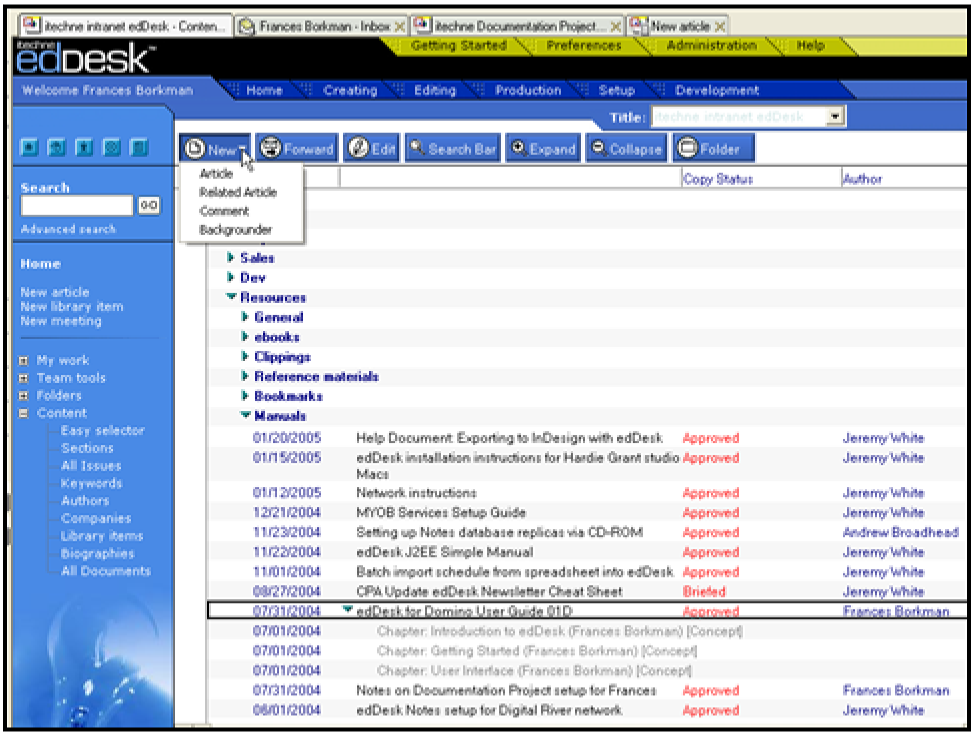


Figure 235: Article selected from Content > Sections

If you select the *New* menu and then *Article* you will find that your new article has the Volume and Number fields pre-filled with the same information as for the article you had selected.

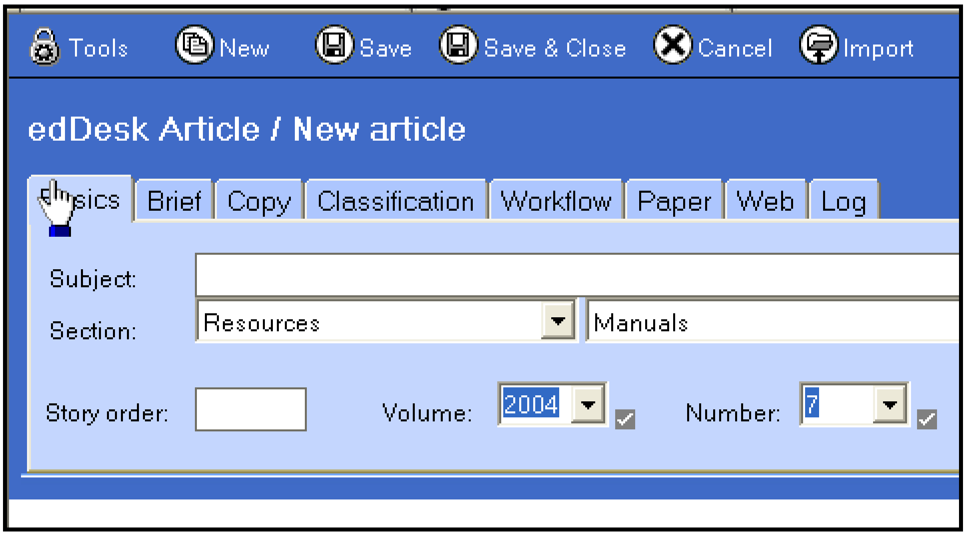


Figure 236: Pre-filled Volume and Number fields taken from selected article in Figure 10 above

Important Note:

If you use the Content view and are briefing out a lot of material you must remember that your new articles inherit characteristics from the selected article in your view.

After you have briefed out your new article, edDesk takes you back to your content view and any new article automatically inherits the Volume and Number from the selected article.

Remember that you may need to update these fields with the correct information for the particular new article you are creating.

How do I create a link from a small image on my webpage to a larger (or better quality) image, preferably opening in a new window.?

11. Be in the article you want to have the images available in.
12. Add the small image to the article, in the position in which you want it to display on the posted webpage.
13. Click on **Attachments and resource files** (this is at the bottom of your article). This section expands.

Figure 237: Expanded Attachments and resource files section of the article

14. Click on the <*Attach files*> button.
15. The **Create Attachments** dialogue box displays. Locate the image you want to link to.
16. Double-click on the image. It is now added to the article (in the Attachments and resource files section).
17. Click once on the small image.
18. Select *Add Hotspot (shape)*.
19. Choose a shape that fits with the area you want to make a hotspot. If you want to select an irregular area then select *Add Hotspot Polygon*.
20. Position your cursor where you want your hotspot to be then drag your mouse to make the hotspot the required size.
21. The **Hotspot** properties dialogue box opens. There are a couple of fields that you need to complete:
    - Type: leave this as URL

- Value: This must be in the format articleIDs/[thisdocid]/$file/[filename]

  WHERE
  [thisdocid] is the article ID and
  [filename] is the filename of the image.

  Important

  The square brackets just indicate that variable information goes here - make sure that you don't put them in your value field.

- Type: enter `_new.` This opens the linked image in a new browser window.

To get the article ID:

3. Go to the **Web** tab.

4. Copy the contents of the Article ID field.

About the images used in this screen capture

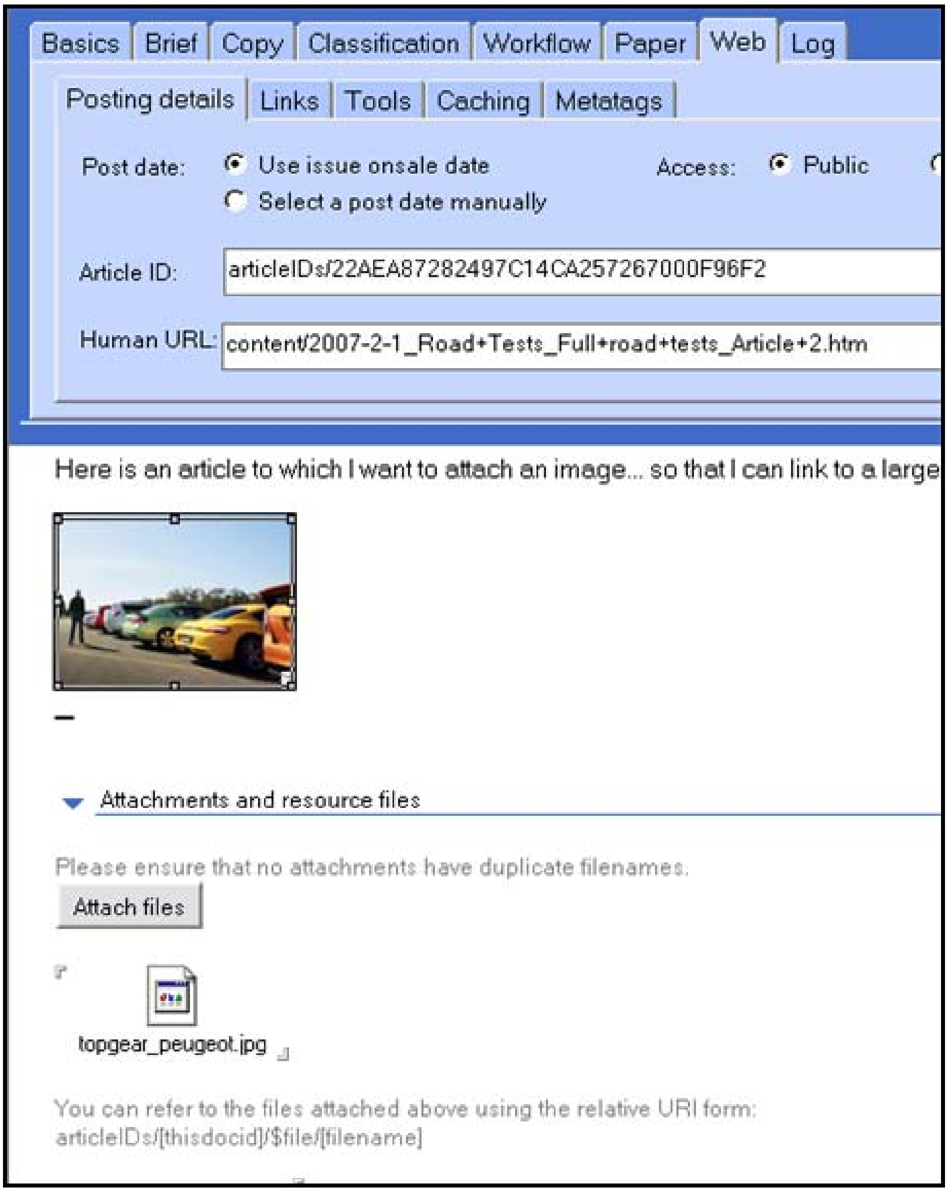


Figure 238: Image in body of article, with Attach files listing image linked to by a hotspot set in the body image.

This article has an image in the body of the article. It also has an attached file `topgear_peugeot.jpg`.

A hotspot was created around the image in the body of the article. The hotspot properties `Value` field contains the following:

> `articleIDs/22AEA87282497C14CA257267000F96F2/$file/`
> `topgear_peugeot.jpg`

WHERE

> `22AEA87282497C14CA257267000F96F2` is the articleID (from the **`Web`** tab) AND
>
> `topgear_peugeot.jpg` is the name of the attached file.

How do I make the text in an article larger, so it's easier to see when I'm editing?

1. Open the article and go into **Edit** mode.
2. Select all the text in the body of the article.
3. Press <Ctrl>+K. The **Text properties** dialogue box opens at the font  tab.

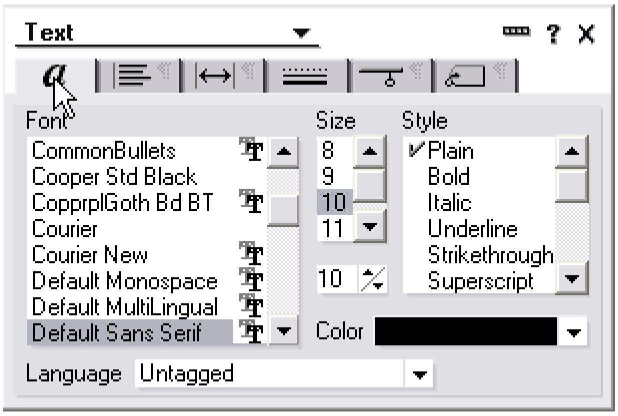


Figure 239: Text properties dialogue box

4. Select the font size as required.
5. Click on the close icon.

I prefer to use my keyboard where possible. Are there any keyboard shortcuts?

There are many keyboard shortcuts. The most useful when you are in an article are listed below. They are grouped into Macintosh and PC shortcuts.

Macintosh users

You must be in Edit mode before using the shortcuts.

Press	To do this
COMMAND+B	Bold selected text
COMMAND+E	Toggles between Edit and Read modes
COMMAND+F	Find text and replace
COMMAND+G	Find next word when "Find text and replace" starts
COMMAND+I	Italicize selected text
COMMAND+J	Format paragraphs (alignment, spacing, etc.)
COMMAND+K	Format text (font, size, color, etc.)
COMMAND+R	Show/Hide ruler
COMMAND+T	Change text style to default (color changes only if the text style is from a Paragraph Style)
COMMAND+U	Underline selected text
F1	Undo last action
F7	Indent first line in paragraph
F8	Indent entire paragraph
F9	Refresh current document (in Edit mode), view, or workspace
F11	Cycle through paragraph styles (defined in the Paragraph Styles tab in Text Properties)
SHIFT+COMMAND+L	Insert page break
SHIFT+F7	Outdent first line in paragraph
SHIFT+F8	Outdent entire paragraph

PC users

You must be in Edit mode to use these shortcuts.

Press	To do this
CTRL+B	Bold selected text
CTRL+E	Put document in either Read or Edit mode
CTRL+F	Find text and replace
CTRL+G	Find next word when "Find text and replace" starts
CTRL+I	Italicize selected text
CTRL+J	Format paragraphs (alignment, spacing, etc.)
CTRL+K	Format text (font, size, color, etc.)
CTRL+R	Show/Hide ruler
CTRL+T	Change text style to default (color changes only if the text style was applied using a Paragraph Style)
CTRL+U	Underline selected text
CTRL+Z	Undo last action
F2	Enlarge selected text to next available point size
F7	Indent first line in paragraph
F8	Indent entire paragraph
F9	Refresh current document (in Edit mode), view, or workspace
F11	Cycle through paragraph styles (defined in the Paragraph Styles tab in Text Properties)
SHIFT+CTRL+L	Insert page break
SHIFT+F2	Reduce selected text to next available point size
SHIFT+F7	Outdent first line in a paragraph
SHIFT+F8	Outdent entire paragraph

Your notes and comments

Please feel free to send feedback to fborkman@itechne.com