

## 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:** If you 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

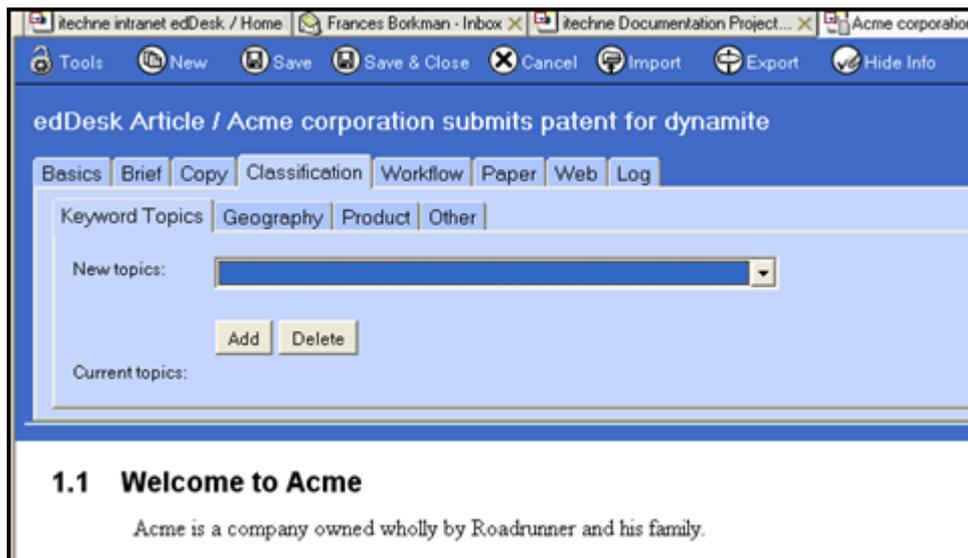


Figure 89: Classification tab, showing the Keyword Topics subtab

#### Classification options not listed

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

① 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.

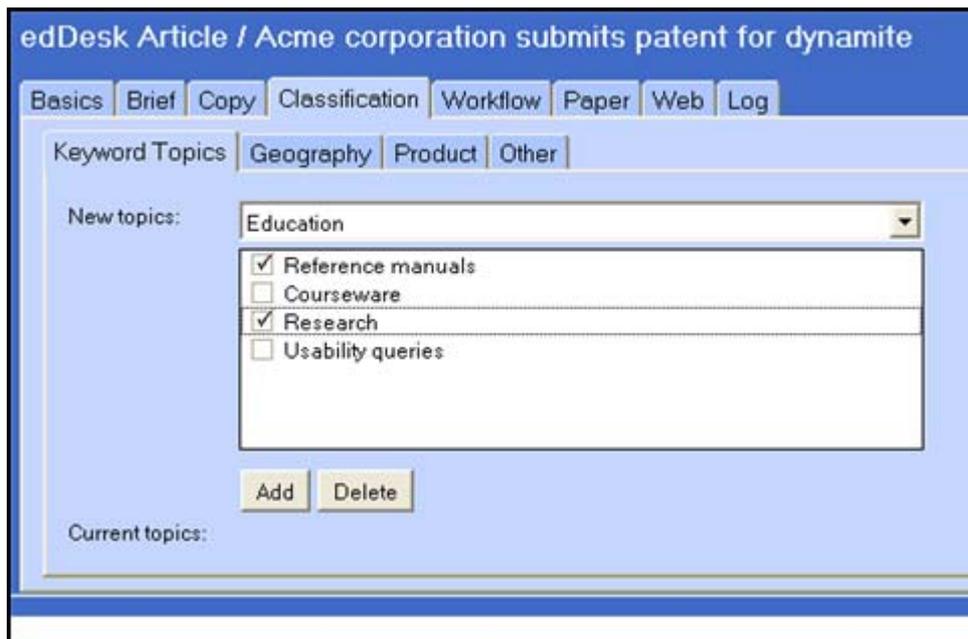


Figure 90: Keyword Topics Education with Reference manuals and Research selected

**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.

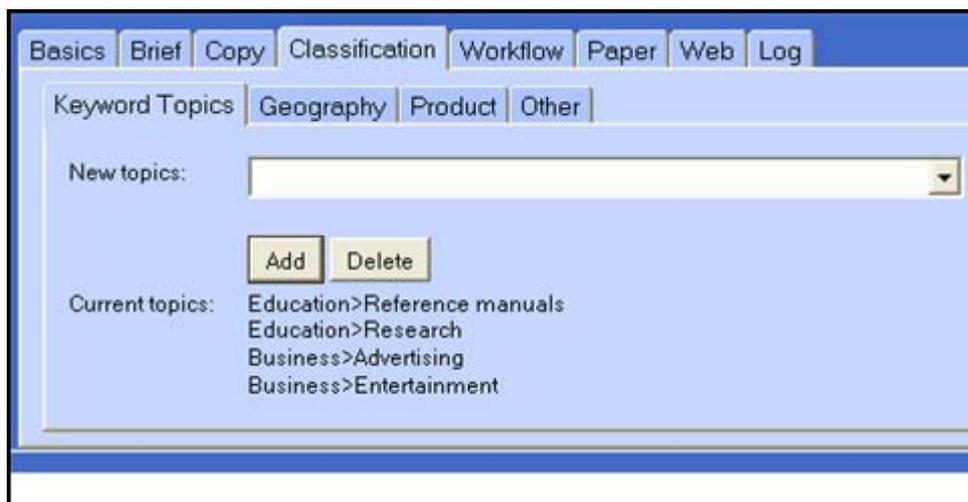


Figure 91: Selected keywords are displayed in the Current topics field. Keywords have been chosen from Keyword Topics of Education and Business.

## 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.

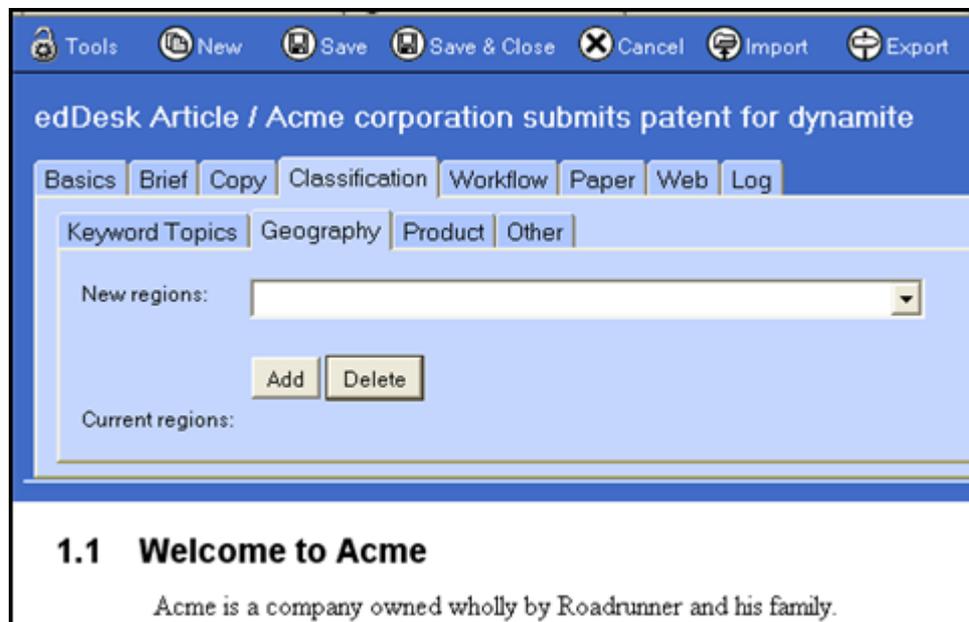


Figure 92: The Geography tab

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**.

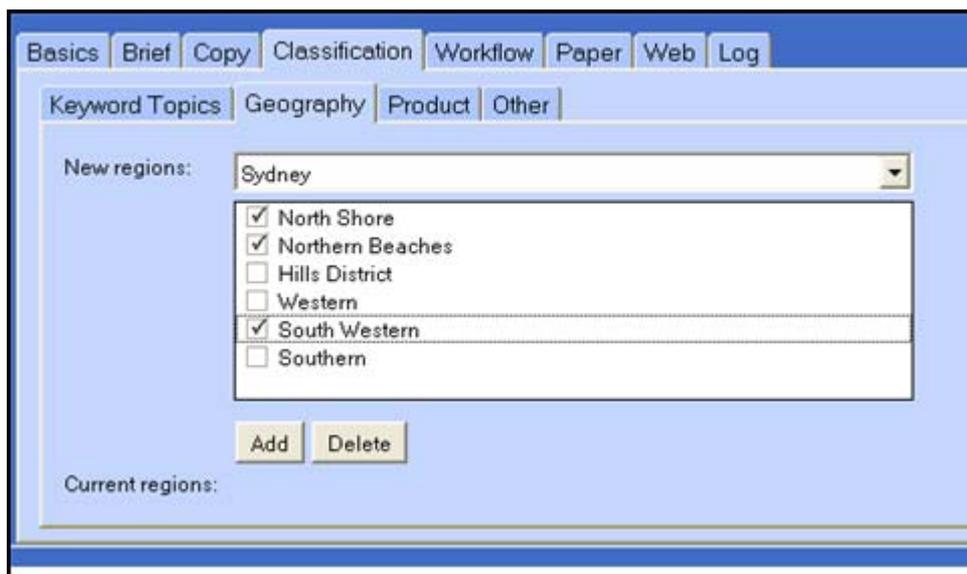


Figure 93: Selected region is "Sydney" with selected areas of North Shore, Northern Beaches and South Western

### ***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.

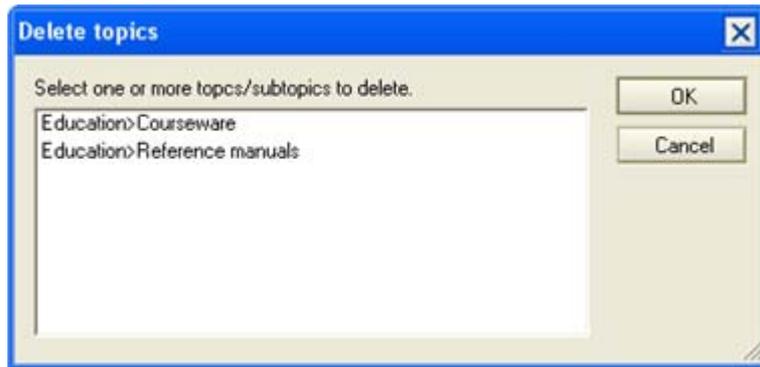


Figure 94: Delete keyword topics - no selection made yet

4. Select the keyword or geographical region to delete.

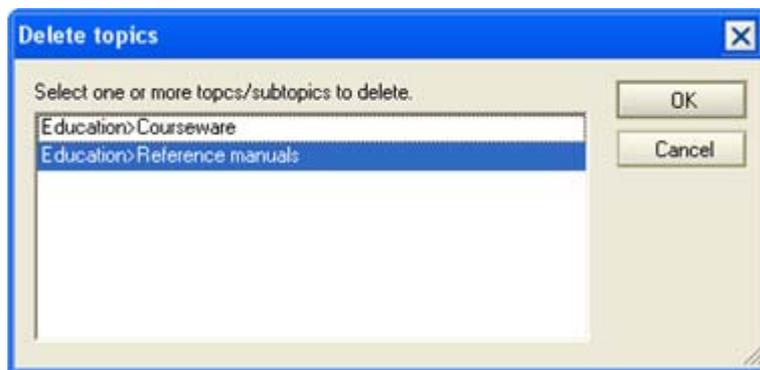


Figure 95: Delete Keyword topics with Keyword topic: Education and subtopic:Reference manuals selected for deletion from this article

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

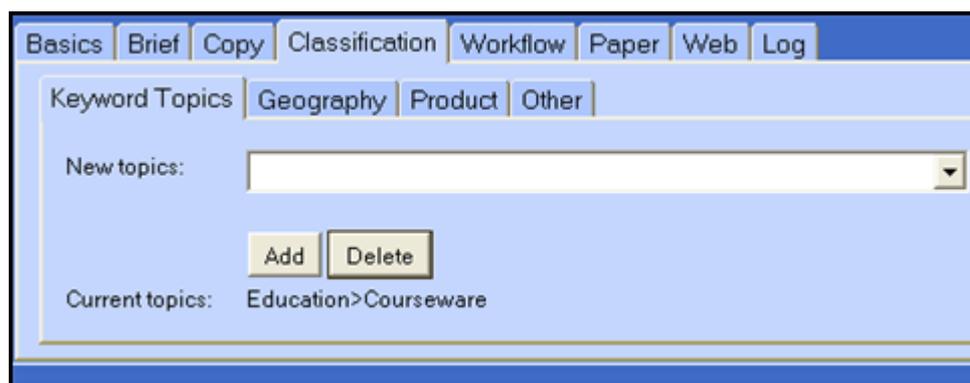


Figure 96: Keyword topics with the Keyword topic "Education>Reference manuals" deleted from this article

### 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.

The screenshot shows the 'edDesk Article / Notes on Documentation Project setup for Frances' window. The 'Product' tab is selected, and the 'Product details' sub-tab is active. The form contains the following fields:

- Product ID Type: dropdown menu (selected: ISBN-10)
- Citation: text input field
- Product form: dropdown menu (selected: Undefined)
- Product form description: text input field
- Contributor statement: text input field
- Distributor: text input field
- Product ID: text input field
- ISBN: text input field
- Price: text input field
- Price description: text input field
- Contributors: text input field
- Availability: dropdown menu

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.

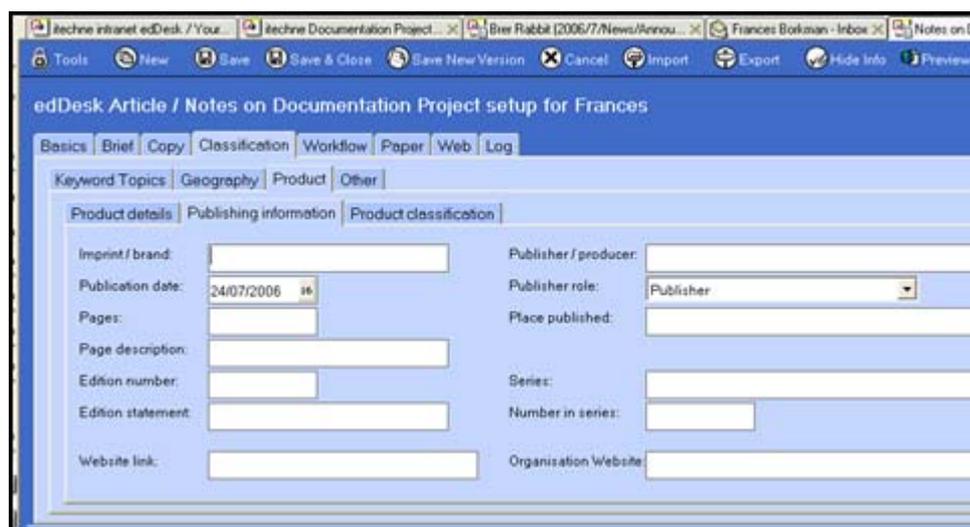


Figure 98: Classification > Product details > Publishing information tab

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 in 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.

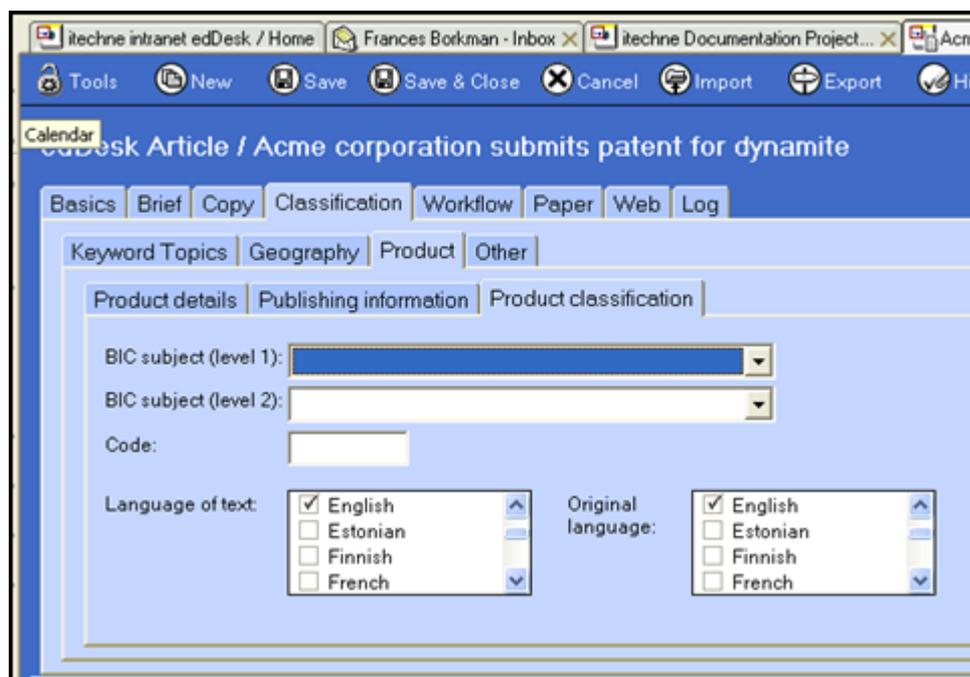


Figure 99: Classification > Product > Product classification tab on entry.

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.

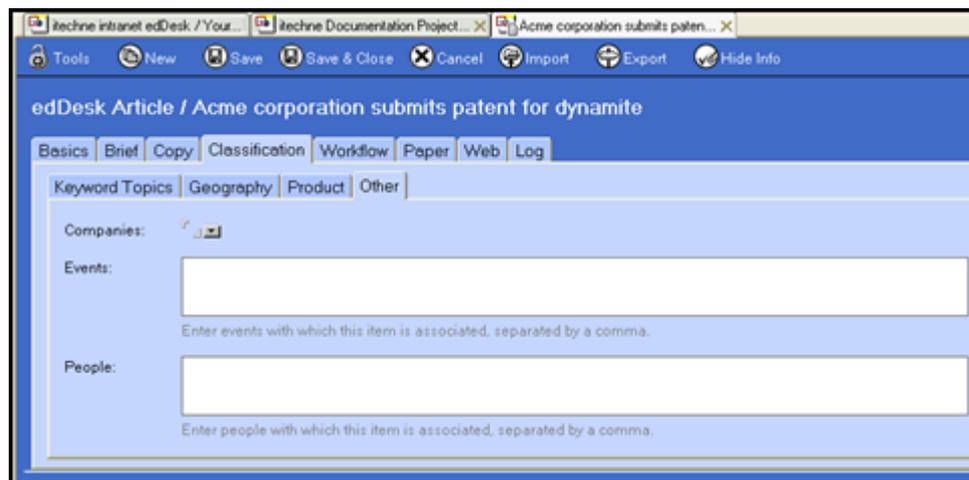


Figure 100: Classification > Other tab on entry.

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.

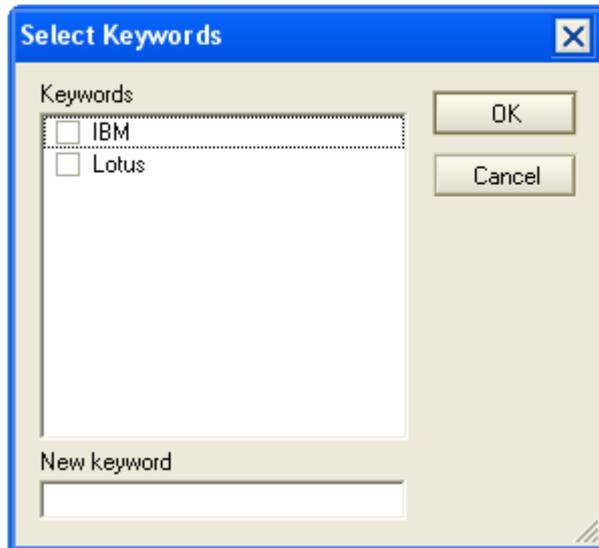


Figure 101: Current Companies dialog box. No companies are selected yet.

- 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** dialog box is closed and the **Other** tab displays, with your selected companies listed.

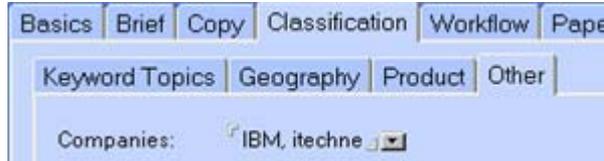


Figure 102: Selected companies. The company "itechne" has been added in the New keyword field of the Companies dialog box.

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 Illustration 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.

① For more information on attaching images and entering filenames in the hi-res filenames field see [Chapter 9: Including documents and images in articles](#).

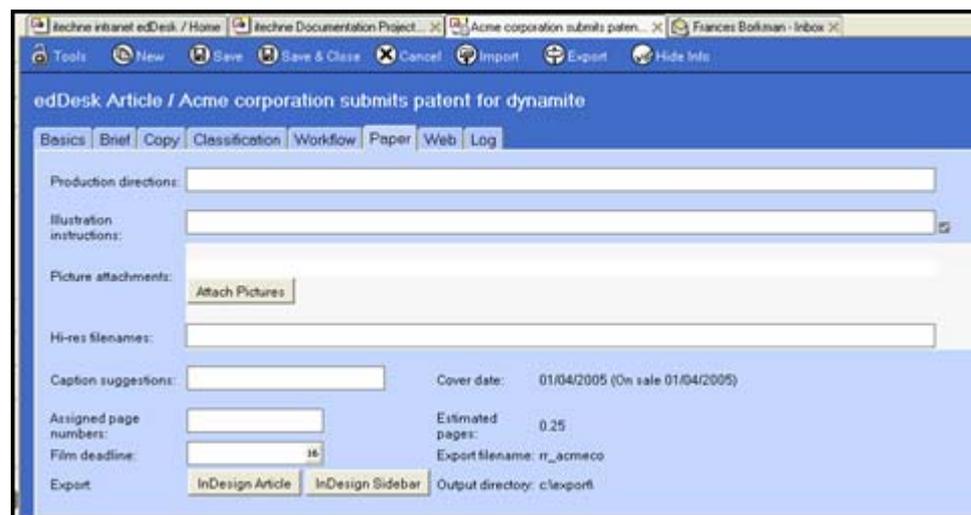


Figure 103: Paper tab when first selected.

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

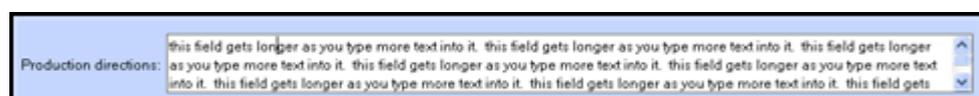


Figure 105: Production directions - automatically expanded, and including word wrapping, to accommodate lengthy text.

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.

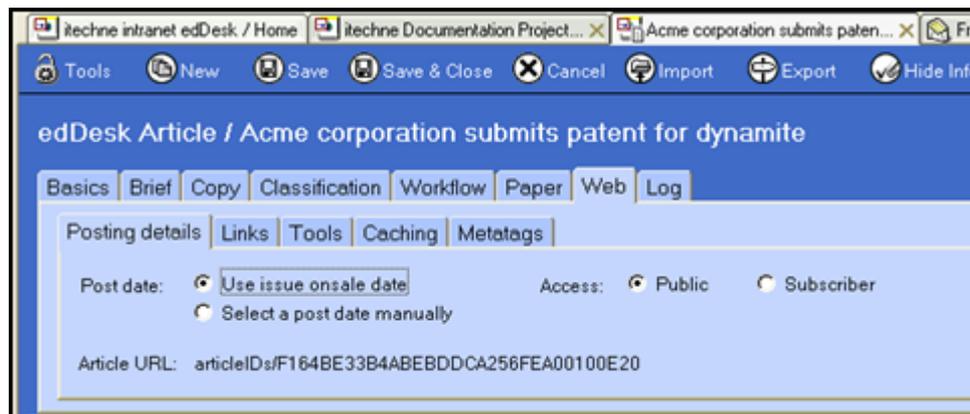


Figure 107: Web tab with default sub tab of Posting details displayed

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.  
  
① 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.

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.

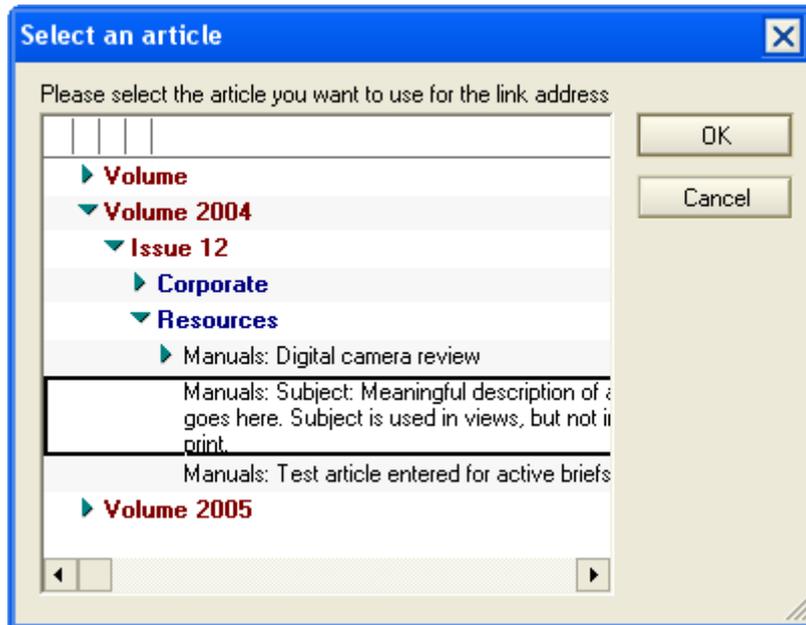


Figure 109: Link type of Article on this website has been selected

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 dialog 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.

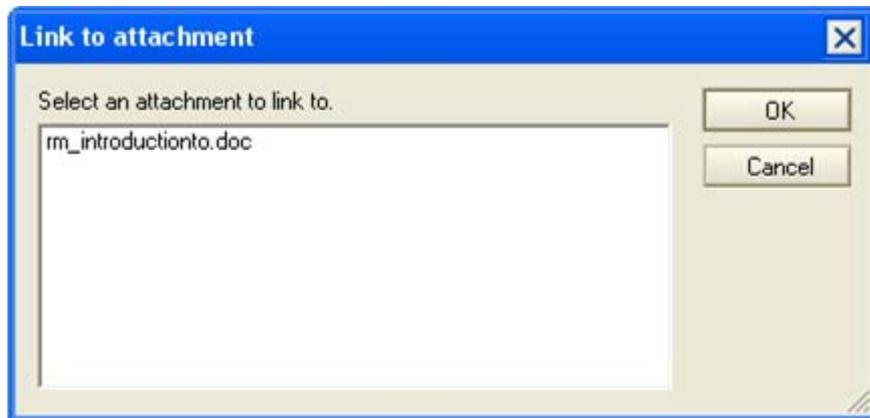
### **Attachment**

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.

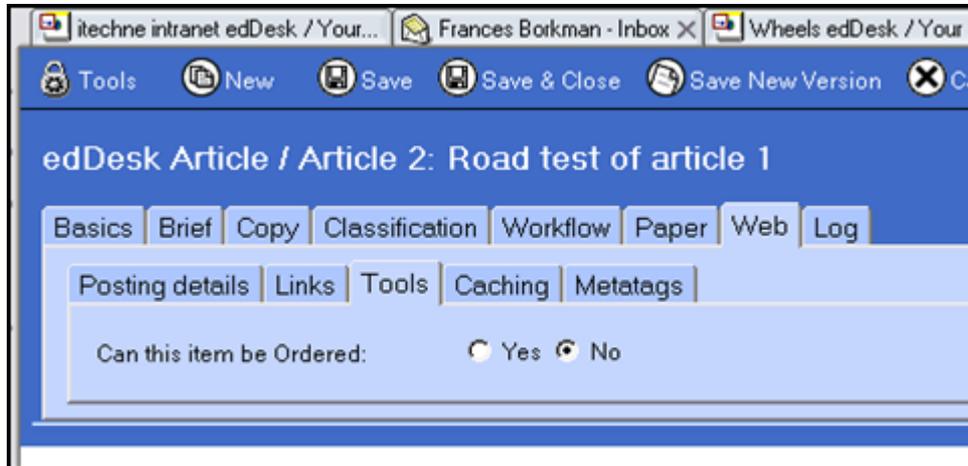


Figure 112: Tools tab

### 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.

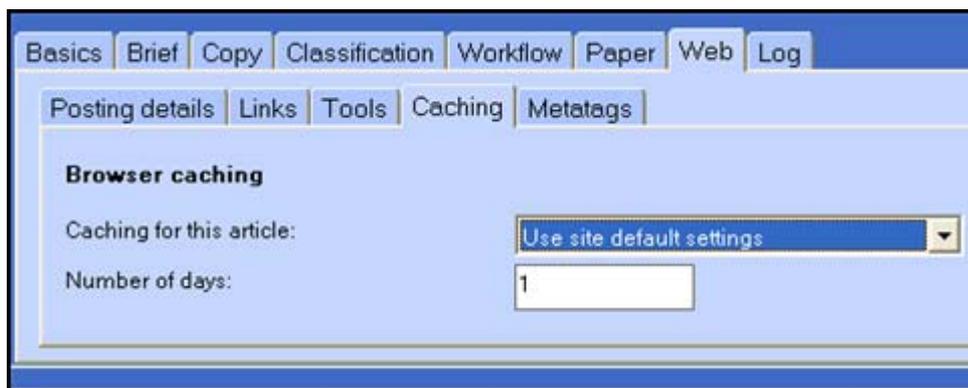


Figure 113: Caching tab with default settings shown.

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.

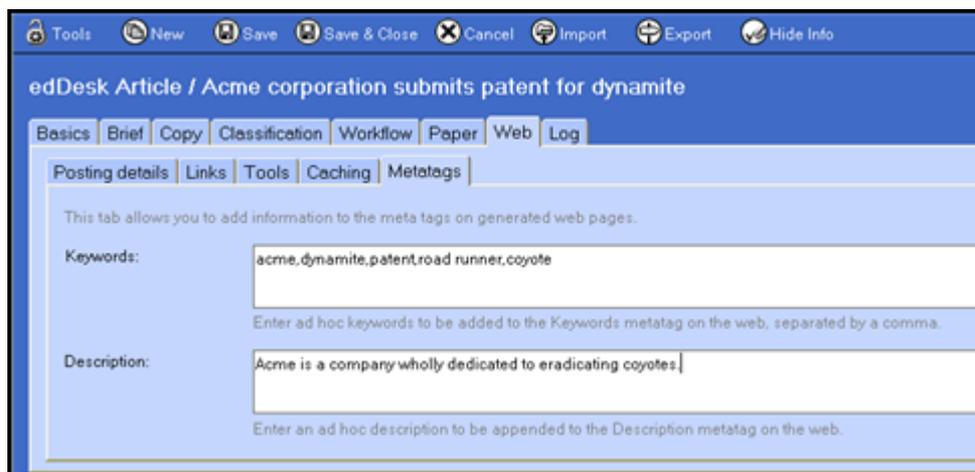


Figure 114: Metatags tab with keywords and description.

## 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.

① see [section 10.5: Export menu](#) for instructions on exporting articles.