

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.

① see [section 6.2: What is an article?](#) and

① [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.

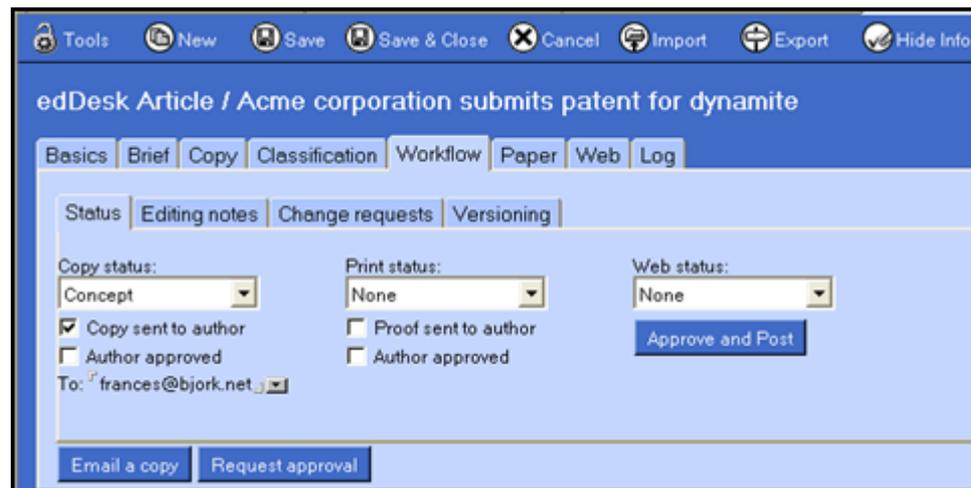


Figure 131: Workflow tab with subtabs - parent article

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).

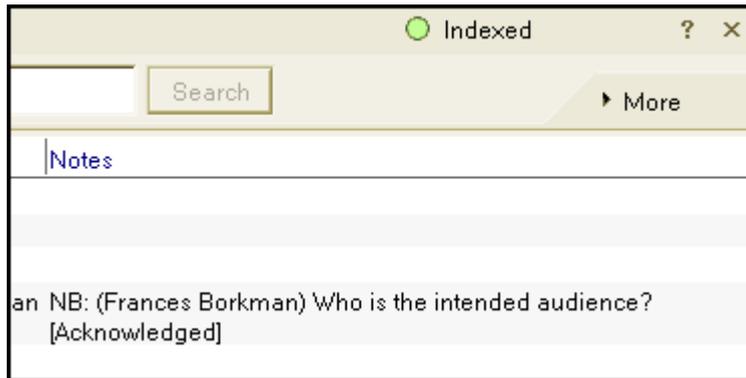


Figure 133: Notes field of the Subs work desk view. This field has the assigned person as Frances Borkman and also indicates that this editing note has been acknowledged.



Figure 134: Editing notes tab (for a first level article).

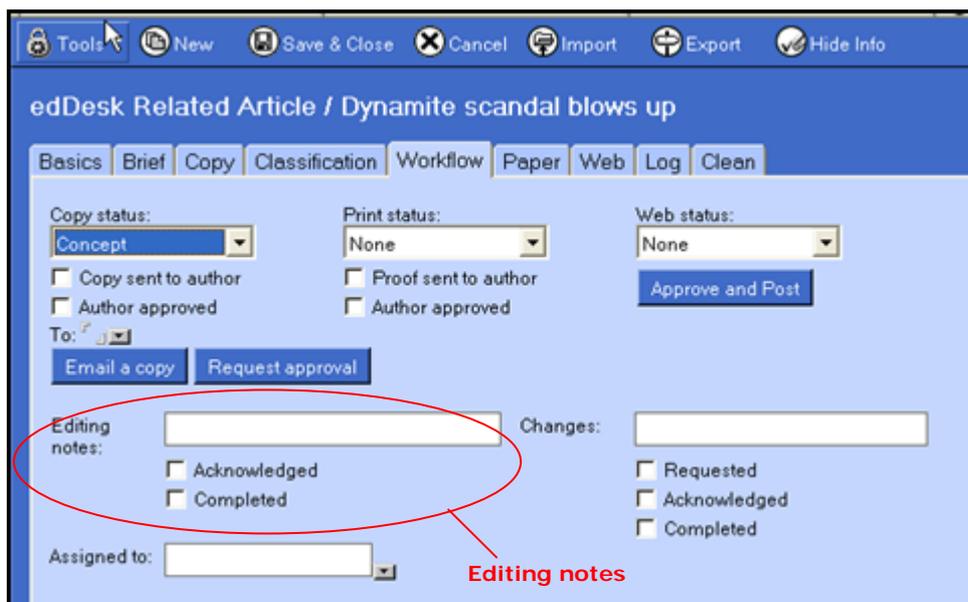


Figure 135: Editing notes field in a subarticle.

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).

	Change status	Sent status	Changes
Issue 2005:3			
News			
Acme corporation submits patent for dynamite	Requested Acknowledged	Copy sent to author	Please writ

Figure 136: Changes required view showing that the Changes required has been Requested and Acknowledged.

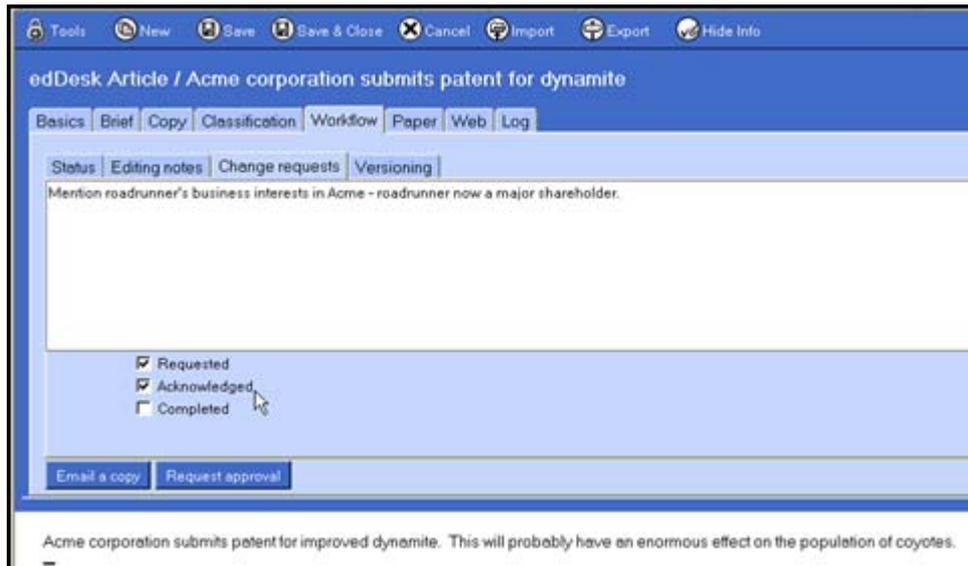


Figure 137: Change requests tab in a first level article, with Change status as Requested and Acknowledged

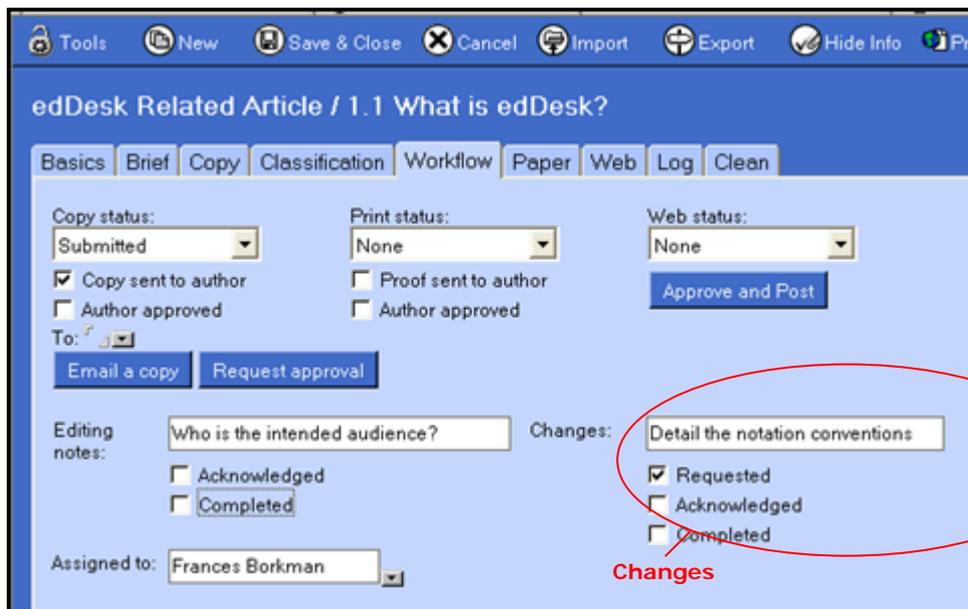


Figure 138: Changes field in a subarticle.

i Editor - entering a change request

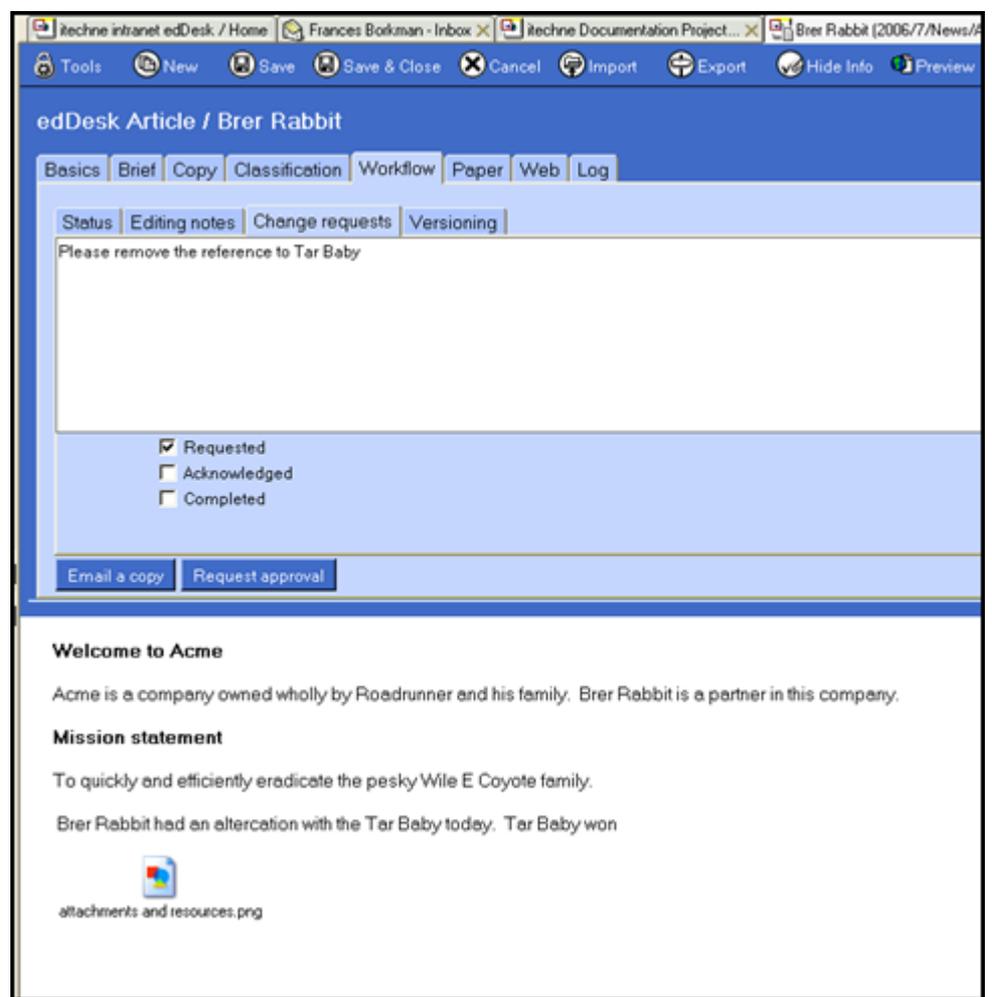
1. Go to the **Workflow** > **Change requests** tab (for a first level article) or to the **Workflow** tab and Changes field in a subarticle.
2. Type your request. For subarticles, this is typed in the Changes field.
3. **Assigned to:** Enter the email address of the person who will be making the changes – 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.

26/06/2005	▼ Newspapers of Australia - Instructional Documentation Approved article only
	Comment: Comment (Frances Borkman)
	Comment: title of article for publication (Frances Borkman)
	Notes: background information on newspapers (Frances Borkman)
	Research: Acme corporation directors charged with fraud (Frances Borkman)
26/06/2005	Version (02/10/2005 04:13:34 PM): Newspapers of Australia - Instructional Documentation
26/06/2005	Version (02/10/2005 04:12:56 PM): Newspapers of Australia - Instructional Documentation
26/06/2005	Version (02/10/2005 04:13:17 PM): Newspapers of Australia - Instructional Documentation

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.