

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.

Section ^	Order ^	Description	Active	Web
Corporate	2	Corporate information and applications	✓	☑
Dev	4	Development tools and resources	✓	☑
Home	0	Home area of the intranet		
Inbasket	10	New stories unassigned to a section	✓	
Marketing	8	Consumer and trade marketing	✓	☑
News	1	News and announcements	✓	☑
Planning	6	Planning documents	✓	☑
Resources	5	Documents, templates, links and more	✓	☑
Sales	3	Sales documentation	✓	☑
Work	7	Work in progress	✓	☑

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*.

- Click on <Add Section>. The **Section definition** form displays.

Figure 188: Section definition form

- 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.
- 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).
- 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".
- Section Editors:** Name of the people who edit articles that are given this section.
- Show in online menus?:** Select *Yes* if you want the section available in the web version of edDesk.
- 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.
- Click on <Save & Close>.
- Your section is added to the **Sections** view.

ii Editing sections

- Go to the **Setup** tab.
- Select *Sections*.
- 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.



Section	Subsection	Description	Order	Active	Web
▼ News					
	Announcements	Company announcements and general posts	1	✓	☑
	Press releases	Company press releases	2	✓	☑
	Clippings	Press clippings of interest to the company	3	✓	☑
	Tender announcements	New tender announcements	4	✓	☑
	Corporate news	This is a test subsection	100	✓	☑
▼ Corporate					
	Policy	Public policy and government relations	1	✓	☑
	Administration	Administrative forms and information	10	✓	☑
	Templates	Company templates and forms	20	✓	☑
	Human Resources	Human resources and staffing	30	✓	☑
	Training	Training information	50	✓	☑
	Policies	Policies and procedures	60	✓	☑
	Legal	Legal documents and materials	70	✓	☑
	Agreements	Agreements and contract documentation	80	✓	☑

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.

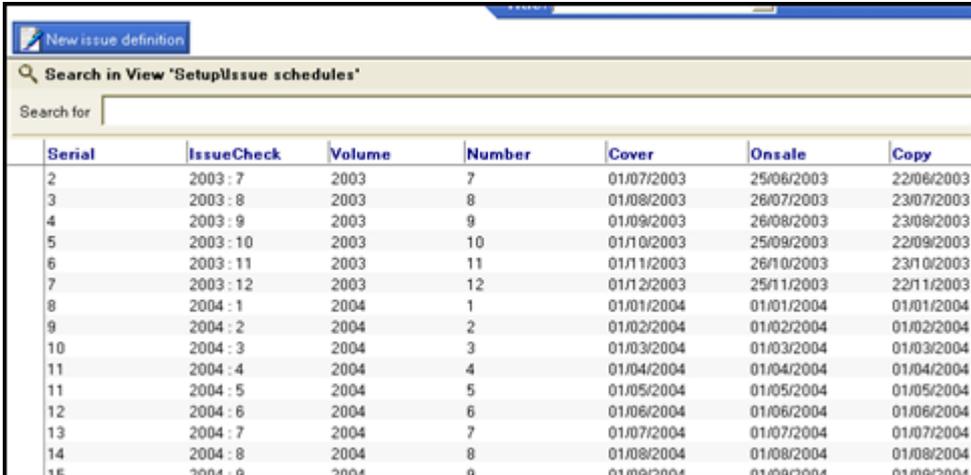
ii Editing subsections

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.

The screenshot shows the 'Issue definition' form in the edDesk application. The form is titled 'Issue definition' and has a blue header bar with the 'eddesk' logo and two buttons: 'Save & Close' and 'Cancel'. Below the header, the form contains several input fields with pre-filled values:

- Issue Serial Number: 26
- Volume: 2005
- Number: (empty)
- Cover date: (empty)
- Onsale date: 25/06/2005
- Copy deadline: 22/06/2005
- Cover line: (empty)
- Issue description: (empty)
- Cover image: (empty)

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.

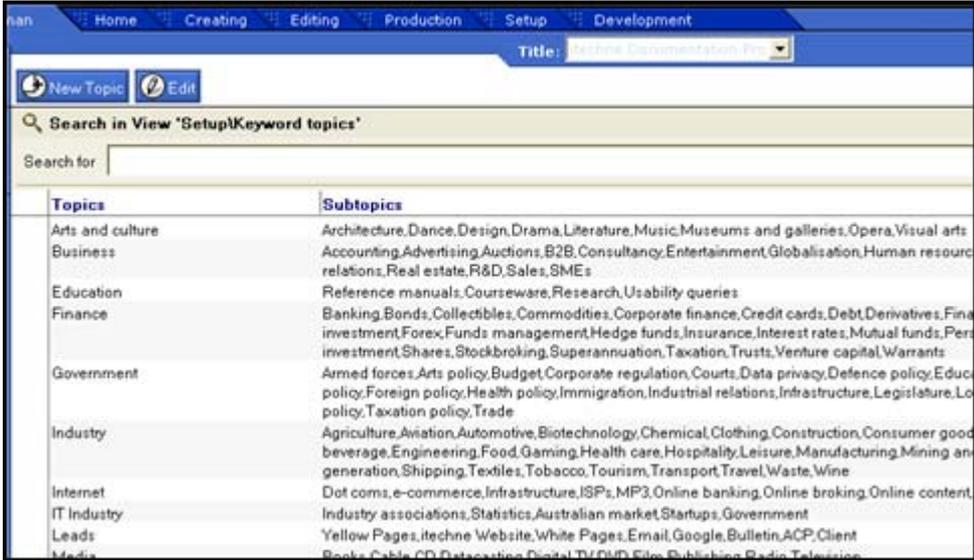
11. Cover line: This is optional. A very short (two or three words) version of the main cover line.
12. Issue description: This is optional. One paragraph summary of the main story for this issue.
13. Cover image: This is optional. Use the **File** menu then select *Attach* to attach a 80 pixel, 60% 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.



Topics	Subtopics
Arts and culture	Architecture, Dance, Design, Drama, Literature, Music, Museums and galleries, Opera, Visual arts
Business	Accounting, Advertising, Auctions, B2B, Consultancy, Entertainment, Globalisation, Human resource relations, Real estate, R&D, Sales, SMEs
Education	Reference manuals, Courseware, Research, Usability queries
Finance	Banking, Bonds, Collectibles, Commodities, Corporate finance, Credit cards, Debt, Derivatives, Fine investment, Forex, Funds management, Hedge funds, Insurance, Interest rates, Mutual funds, Per investment, Shares, Stockbroking, Superannuation, Taxation, Trusts, Venture capital, Warrants
Government	Armed forces, Arts policy, Budget, Corporate regulation, Courts, Data privacy, Defence policy, Education policy, Foreign policy, Health policy, Immigration, Industrial relations, Infrastructure, Legislation, Local policy, Taxation policy, Trade
Industry	Agriculture, Aviation, Automotive, Biotechnology, Chemical, Clothing, Construction, Consumer goods, beverage, Engineering, Food, Gaming, Health care, Hospitality, Leisure, Manufacturing, Mining and generation, Shipping, Textiles, Tobacco, Tourism, Transport, Travel, Waste, Wine
Internet	Dot coms, e-commerce, Infrastructure, ISPs, MP3, Online banking, Online broking, Online content
IT industry	Industry associations, Statistics, Australian market, Startups, Government
Leads	Yellow Pages, itechne Website, White Pages, Email, Google, Bulletin, ACP, Client
Media	Books, Cable, CD, Datascope, Digital TV, DVD, Film, Publishing, Radio, Television

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

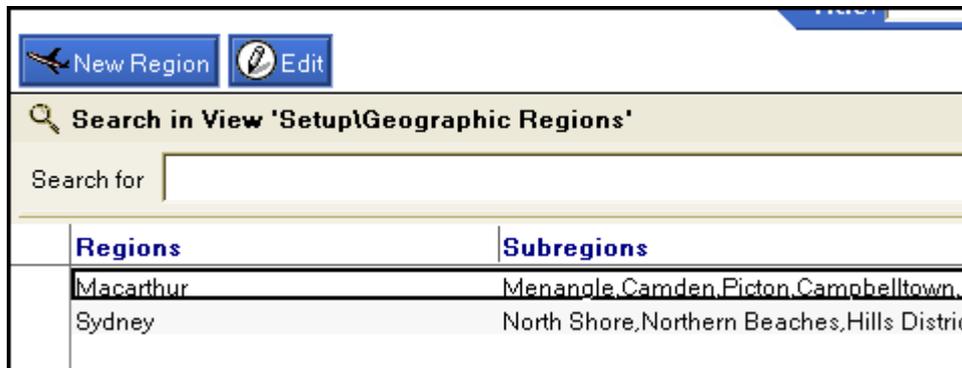
4. **Title of the keyword topic:** Enter the title of your keyword topic. Make sure that it is meaningful and describes the type of subtopics that you will create in this topic.
5. **Included keyword sub topics:** Enter the keyword subtopics. Separate each subtopic with a comma. Type the subtopics in 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. ① see [section 11.3ii: Geography](#) for more information.



Regions	Subregions
Macarthur	Menangle, Camden, Picton, Campbelltown, C...
Sydney	North Shore, Northern Beaches, Hills Distric

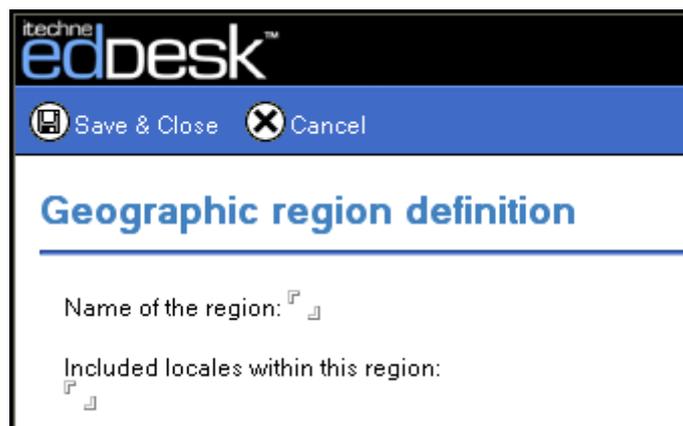
Figure 195: Sample Geographical regions.

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.



itechne
eddesk[™]

Save & Close Cancel

Geographic region definition

Name of the region:

Included locales within this region:

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

Key	Name	Directory	Root
1	itcne intranet	c:\export	it

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>.