

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.

① 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.

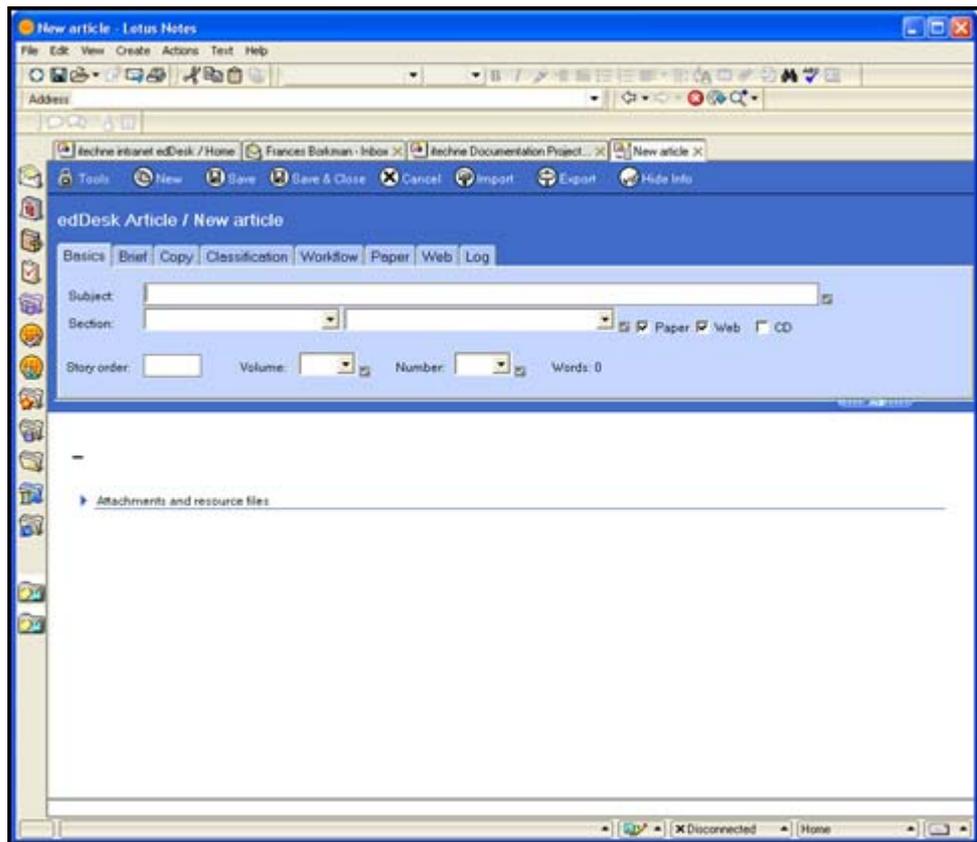


Figure 37: Article form - Basics tab active

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.

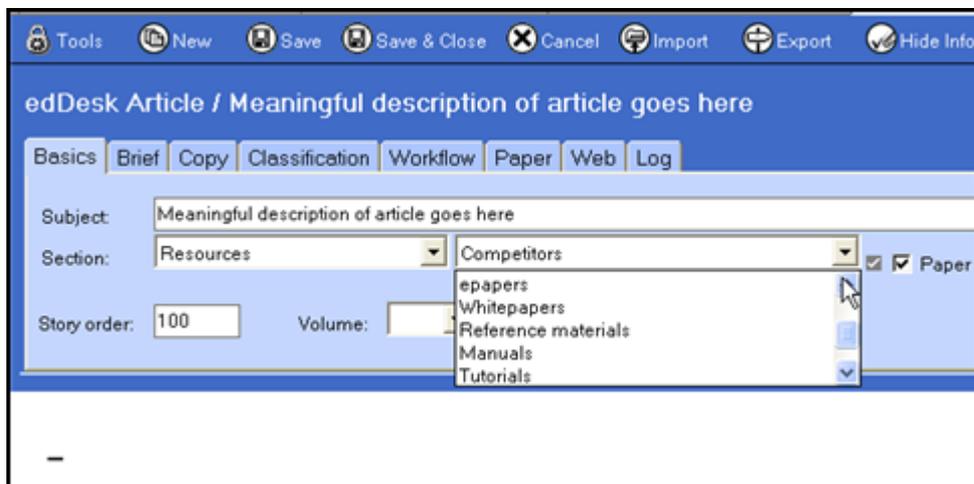


Figure 40: Sample dropdown list for Subsections

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.

① 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.

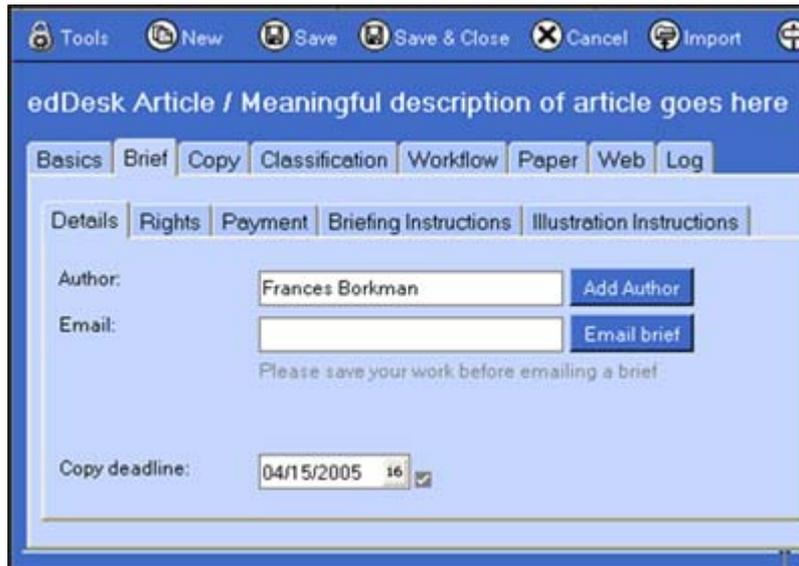


Figure 42: Initial view of Brief > Details tab

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.

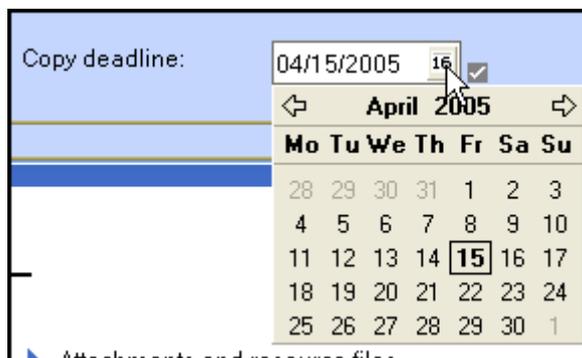


Figure 43: Popup calendar displayed for copy deadline

Rights

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

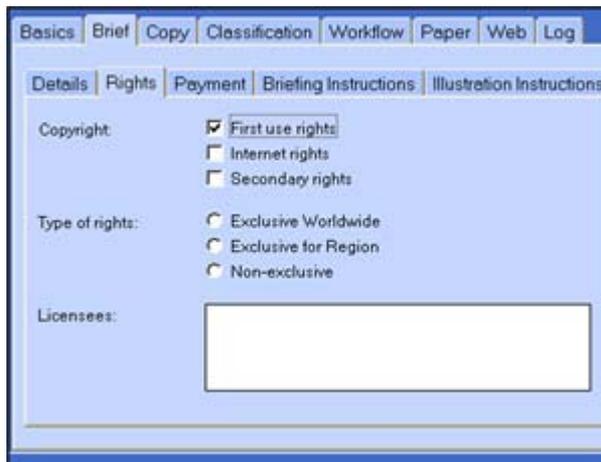


Figure 44: Initial view of Brief > Rights tab

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.

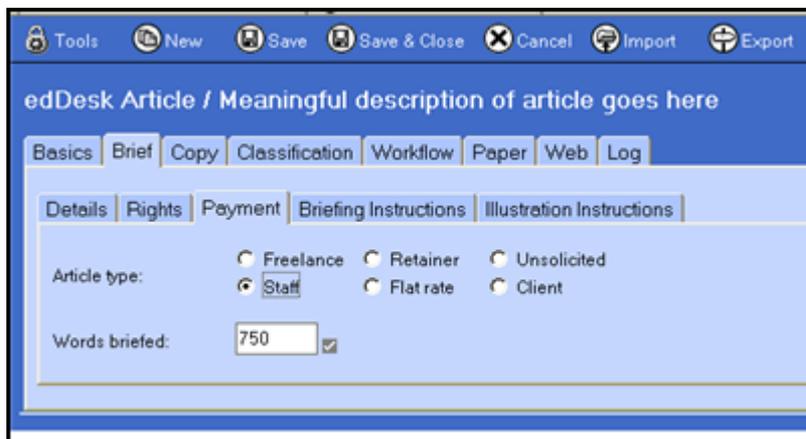


Figure 45: Initial view of Brief > Payment tab

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).

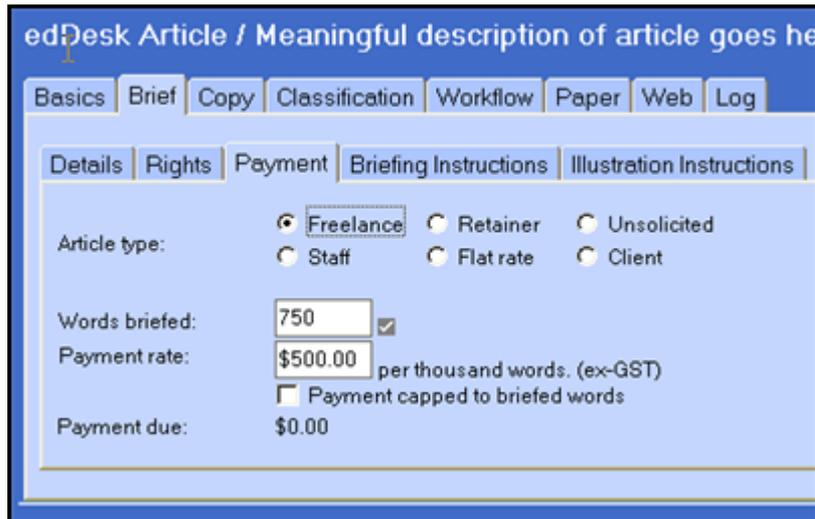


Figure 46: Payment tab after selecting Freelance article type

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.

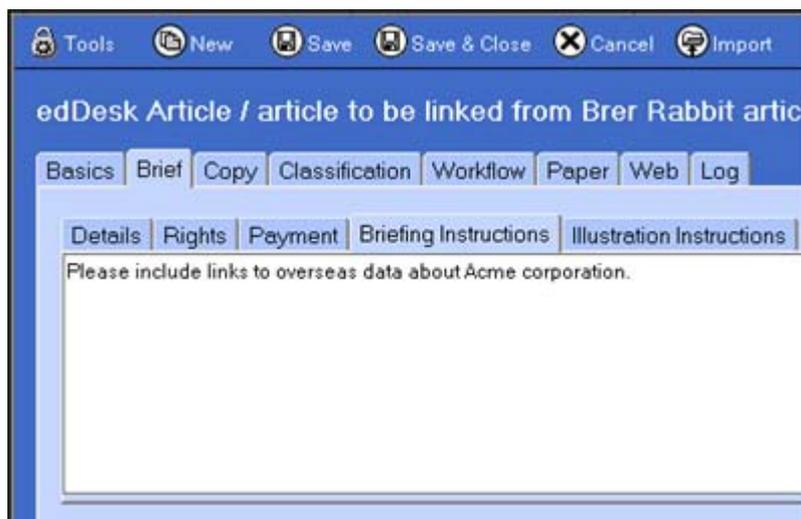


Figure 47: Briefing instructions tab

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.

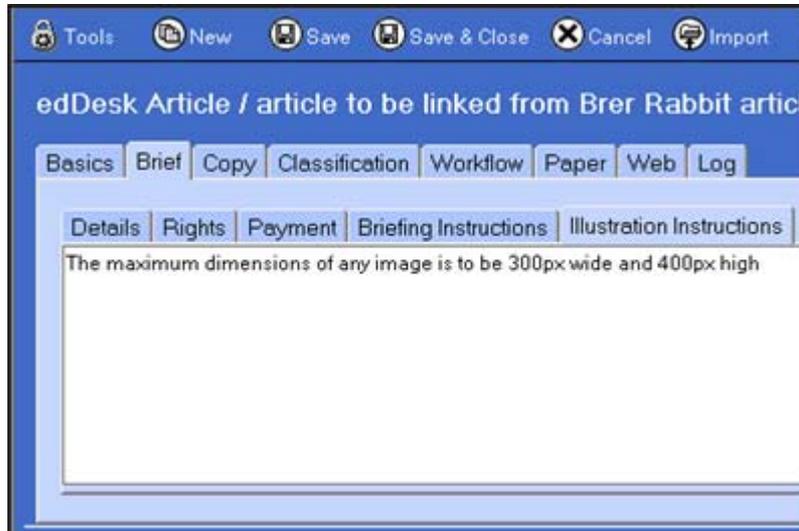


Figure 48: Brief > Illustration Instructions tab

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.

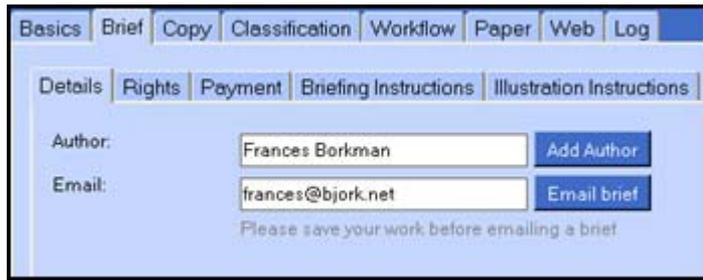


Figure 50: Email address of author to be briefed

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

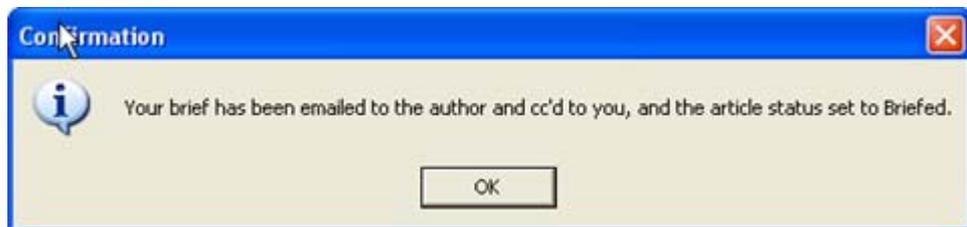


Figure 51: Confirmation message of briefing

5. Click on *<OK>*.

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

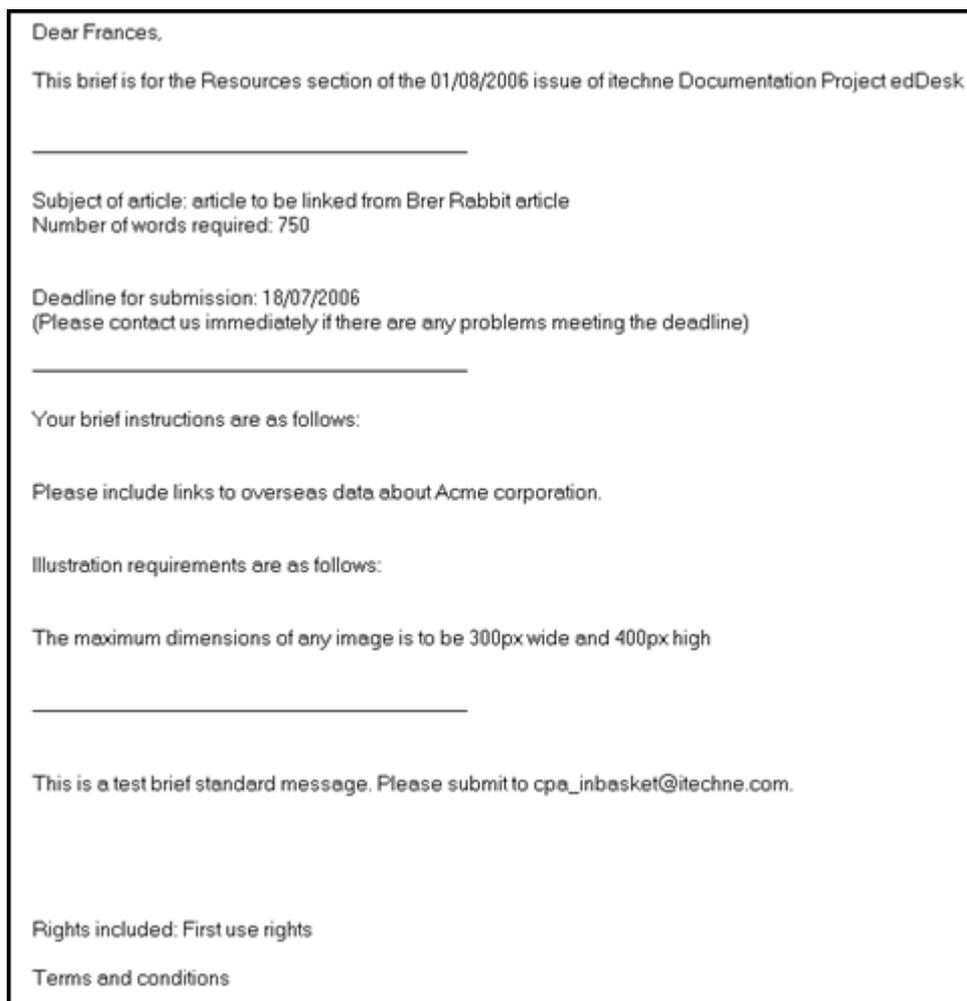


Figure 52: Example of emailed brief

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.

① see [Chapter 13: Workflows](#) for instructions on entering workflow information.

