

Table of Contents

DISCLAIMER	I
ACKNOWLEDGEMENTS.....	II
1. INTRODUCTION	1-1
1.1 What is edDesk?.....	1-1
1.2 General objectives.....	1-1
1.3 Intended audience	1-2
1.4 About this User Guide.....	1-2
1.5 Notation Conventions	1-2
<i>i Spelling</i>	<i>1-3</i>
<i>ii Control keys</i>	<i>1-3</i>
1.6 Terminology.....	1-3
2. PUBLISHING STEPS IN A NUTSHELL AND HOW THEY RELATE TO EDDESK	2-1
2.1 General publishing procedures.....	2-1
2.2 Typical roles and edDesk knowledge/skills required	2-3
3. GETTING STARTED – BECOMING FAMILIAR WITH EDDESK SCREENS	3-1
3.1 Objectives.....	3-1
3.2 edDesk concepts.....	3-1
3.3 Logging in to edDesk.....	3-1
3.4 edDesk tabs	3-2
<i>i Navigation pane</i>	<i>3-3</i>
<i>ii Tabs – an overview</i>	<i>3-4</i>
4. VIEWS	4-1
4.1 Objectives.....	4-1
4.2 Why do I need Views?	4-1
4.3 Where do views get their information from?	4-1
4.4 General Information about Using Views	4-2
<i>i Selecting a view.....</i>	<i>4-2</i>
<i>ii Display of results</i>	<i>4-2</i>
4.5 Easy Selector.....	4-5
<i>i Setting your criteria in the Easy selector.....</i>	<i>4-7</i>
4.6 Views from the navigation pane	4-9
<i>i All issues</i>	<i>4-9</i>
<i>ii Keywords.....</i>	<i>4-9</i>

	<i>iii</i>	<i>Authors</i>	4-9
	<i>iv</i>	<i>Library items</i>	4-9
	<i>v</i>	<i>Sections</i>	4-10
	<i>vi</i>	<i>Current Issues</i>	4-10
	<i>vii</i>	<i>Companies</i>	4-10
	<i>viii</i>	<i>Biographies</i>	4-10
	<i>ix</i>	<i>All Documents</i>	4-10
4.7		Views from the Home tab.....	4-10
	<i>i</i>	<i>My active briefs</i>	4-10
	<i>ii</i>	<i>My articles</i>	4-11
	<i>iii</i>	<i>My articles by issue</i>	4-12
4.8		Views from the Creating tab.....	4-12
	<i>i</i>	<i>Story ideas</i>	4-12
	<i>ii</i>	<i>Active briefs</i>	4-12
	<i>iii</i>	<i>Filed copy</i>	4-13
4.9		Views from the Editing tab.....	4-13
	<i>i</i>	<i>Late running copy</i>	4-13
	<i>ii</i>	<i>Active briefs</i>	4-13
	<i>iii</i>	<i>Filed copy</i>	4-14
	<i>iv</i>	<i>Ready for production</i>	4-14
	<i>v</i>	<i>Changes required</i>	4-14
	<i>vi</i>	<i>Unassigned copy</i>	4-15
4.10		Views from the Production tab.....	4-15
	<i>i</i>	<i>Subs work desk</i>	4-16
	<i>ii</i>	<i>Changes required</i>	4-17
	<i>iii</i>	<i>Artist and illustration requirements</i>	4-18
	<i>iv</i>	<i>Production directions</i>	4-19
	<i>v</i>	<i>Production schedule</i>	4-19
	<i>vi</i>	<i>View deadline calendar</i>	4-20
	<i>vii</i>	<i>Deadlines</i>	4-20
	<i>viii</i>	<i>Simple export</i>	4-21
	<i>ix</i>	<i>Homepages</i>	4-23
4.11		Views from the Setup tab.....	4-23
5.		SEARCHING FOR ARTICLES	5-1
5.1		Objectives.....	5-1

5.2	Searching in views	5-1
5.3	Opening the search bar.....	5-2
5.4	Text search options	5-2
	<i>i Searching for a single word or a phrase</i>	<i>5-2</i>
	<i>ii Using Boolean operators – AND, OR, NOT.....</i>	<i>5-2</i>
5.5	Slightly more complex searches	5-4
	<i>i Determining the order in which your search criteria is processed.....</i>	<i>5-4</i>
	<i>ii Wildcards.....</i>	<i>5-4</i>
5.6	Advanced search.....	5-4
	<i>i Conditions.....</i>	<i>5-5</i>
	<i>ii Editing your conditions.....</i>	<i>5-9</i>
	<i>iii Options.....</i>	<i>5-10</i>
	<i>iv Navigating through your search results</i>	<i>5-10</i>
	<i>v Saving searches.....</i>	<i>5-11</i>
	<i>vi Using your saved searches.....</i>	<i>5-11</i>
	<i>vii Deleting saved searches.....</i>	<i>5-12</i>
6.	CREATING AN ARTICLE THAT IS READY FOR BRIEFING OUT	6-1
6.1	Objectives.....	6-1
6.2	What is an article?.....	6-1
6.3	Creating an article with briefing instructions.....	6-2
	<i>i Mandatory fields.....</i>	<i>6-3</i>
	<i>ii Basics tab.....</i>	<i>6-3</i>
	<i>iii Brief tab</i>	<i>6-5</i>
6.4	Saving your new article.....	6-9
6.5	Briefing out your article.....	6-9
6.6	A quick look at Workflow	6-11
7.	ENTERING COPY INTO EDDESK	7-1
7.1	Objectives.....	7-1
7.2	Selecting an article to be edited	7-1
7.3	Is my article in Preview or Edit mode?.....	7-2
7.4	Checking out an article	7-3
7.5	Releasing a checked out article.....	7-4
7.6	Pasting text from other applications into an article.....	7-4
7.7	Pasting from complex documents – using “Paste special...”	7-5
	<i>i Paste special formats</i>	<i>7-6</i>

	<i>ii Editing text pasted in with Paste special</i>	7-7
7.8	Attachments and Resource files.....	7-9
	<i>i Attach files</i>	7-10
	<i>ii Lead picture and lead caption</i>	7-10
	<i>iii Further reading</i>	7-10
	<i>iv Website links</i>	7-11
7.9	Formatting text.....	7-11
8.	FORMATTING TEXT	8-1
8.1	Objectives.....	8-1
8.2	Article in Edit mode.....	8-1
8.3	Applying the edDesk standard format	8-1
8.4	Emboldened text	8-2
8.5	Italic text	8-3
8.6	Unordered (bulleted) lists.....	8-3
8.7	Ordered (numbered) lists	8-4
8.8	Nested lists	8-5
	<i>i “Unnesting” lists</i>	8-6
8.9	Creating link (text) hotspots – Linking to other articles and external sites	8-6
	<i>i To link to another article in your database</i>	8-7
	<i>ii To link to another website</i>	8-7
	<i>iii Reviewing your hotspot properties</i>	8-8
	<i>iv Removing a hotspot</i>	8-8
9.	INCLUDING DOCUMENTS AND IMAGES IN ARTICLES	9-1
9.1	Objectives.....	9-1
9.2	What is the difference between Attached and Imported files?	9-1
9.3	Attaching files	9-1
	<i>i File > Attach menu</i>	9-2
	<i>ii Import menu</i>	9-2
9.4	Attaching WP files that you do NOT want to publish with your article.....	9-3
	<i>i To see WP files that have been attached to your article</i>	9-5
9.5	Image Preparation	9-5
9.6	Attaching images that are to be used in printed publishing only	9-5
	<i>i To list images that have been attached to your article</i>	9-7
9.7	Importing an image into an article	9-7
9.8	Image properties.....	9-8

9.9	Image hotspots	9-10
	<i>i To link to another article in your database</i>	<i>9-10</i>
	<i>ii To link to another website:</i>	<i>9-11</i>
	<i>iii To link to a larger image from the image on your webpage.....</i>	<i>9-12</i>
10.	ARTICLE TOOLBAR – TOOLS, NEW, IMPORT, EXPORT	10-1
10.1	Objectives.....	10-1
10.2	Tools menu.....	10-1
	<i>i Checkout / Release.....</i>	<i>10-1</i>
	<i>ii Word count.....</i>	<i>10-1</i>
	<i>iii Address... ..</i>	<i>10-2</i>
	<i>iv Spell check</i>	<i>10-2</i>
	<i>v Print article.....</i>	<i>10-4</i>
	<i>vi Send brief via Email.....</i>	<i>10-4</i>
	<i>vii Standard format</i>	<i>10-4</i>
10.3	New menu	10-4
	<i>i Comments.....</i>	<i>10-5</i>
	<i>ii Backgrounders</i>	<i>10-6</i>
10.4	Import menu.....	10-7
	<i>i Import article from file.....</i>	<i>10-8</i>
	<i>ii Attach original WP file</i>	<i>10-8</i>
	<i>iii Paste text from clipboard.....</i>	<i>10-8</i>
	<i>iv Attach Pics</i>	<i>10-8</i>
10.5	Export menu	10-8
10.6	Hide Info	10-9
10.7	Preview.....	10-10
11.	USING ARTICLE TABS.....	11-1
11.1	Objectives.....	11-1
11.2	Copy tab	11-2
11.3	Classification tab.....	11-3
	<i>i Keyword Topics</i>	<i>11-4</i>
	<i>ii Geography.....</i>	<i>11-6</i>
	<i>iii Deleting Keyword Topics and Geography.....</i>	<i>11-7</i>
	<i>iv Product.....</i>	<i>11-9</i>
	<i>v Other</i>	<i>11-12</i>
11.4	Paper tab.....	11-14

11.5	Web tab	11-16
	<i>i Posting details.....</i>	<i>11-16</i>
	<i>ii Links.....</i>	<i>11-17</i>
	<i>iii Tools.....</i>	<i>11-21</i>
	<i>iv Caching.....</i>	<i>11-21</i>
	<i>v Metatags.....</i>	<i>11-22</i>
11.6	Log tab	11-23
	<i>i Viewing filed, submitted and exported versions of your article.....</i>	<i>11-23</i>
12.	CREATING HIERARCHICAL CONTENT - RELATED ARTICLES	12-1
12.1	Objectives.....	12-1
12.2	Example of an article hierarchy	12-2
12.3	The importance of Story Order in a hierarchy	12-3
12.4	Creating a related article	12-4
	<i>i The three methods of creating related articles</i>	<i>12-4</i>
	<i>ii Filling in article details</i>	<i>12-5</i>
12.5	Saving your related article	12-7
12.6	Creating several levels of related articles	12-7
	<i>i Creating two levels of articles</i>	<i>12-7</i>
	<i>ii Creating more than two levels of related articles.....</i>	<i>12-7</i>
12.7	Reordering your articles – moving them around within a hierarchical level..	12-10
12.8	Moving your articles to another level of a hierarchy	12-11
13.	WORKFLOWS	13-1
13.1	Objectives.....	13-1
13.2	Workflow for authors.....	13-1
13.3	Workflow tab	13-1
	<i>ii Copy status.....</i>	<i>13-3</i>
	<i>iii Print status.....</i>	<i>13-4</i>
	<i>iv Web Status.....</i>	<i>13-4</i>
13.4	Editing notes	13-4
13.5	Change requests	13-6
	<i>i Editor - entering a change request</i>	<i>13-7</i>
	<i>ii Author - updating a change request.....</i>	<i>13-8</i>
13.6	Versioning.....	13-9
	<i>i Versioning choices.....</i>	<i>13-9</i>
	<i>ii Setting your Versioning options.....</i>	<i>13-11</i>

14.	EDITING HOMEPAGES	14-1
14.1	Objectives.....	14-1
14.2	Listing your homepages	14-1
14.3	Preparing to edit a homepage.....	14-2
	<i>i Changing the original homepage so that it is not displayed</i>	<i>14-3</i>
	<i>ii Displaying the copy of the homepage</i>	<i>14-3</i>
14.4	Editing a homepage.....	14-3
	<i>i Basics tab.....</i>	<i>14-4</i>
	<i>ii Copy tab.....</i>	<i>14-4</i>
	<i>iii Modules tab.....</i>	<i>14-5</i>
	<i>iv Attachments and resource files</i>	<i>14-6</i>
	<i>v Example of source and resulting homepage</i>	<i>14-7</i>
15.	HOUSEKEEPING – CANCELLING ARTICLES, REPLICATION, FAVORITE BOOKMARKS, UPDATING AN INDEX	15-1
15.1	Objectives.....	15-1
15.2	Cancelling an Article	15-1
15.3	Replication	15-3
	<i>i Start now.....</i>	<i>15-5</i>
	<i>ii When is replication set to next occur?.....</i>	<i>15-6</i>
15.4	Using Favorite bookmarks	15-6
	<i>i Adding items to your Favorite Bookmarks list</i>	<i>15-6</i>
	<i>ii Creating a bookmark Folder</i>	<i>15-8</i>
	<i>iii Removing an item from the Favorite Bookmarks list.....</i>	<i>15-8</i>
15.5	Updating an index	15-8
	<i>i Does my database use a full-text index?.....</i>	<i>15-9</i>
	<i>ii When was my index last updated?</i>	<i>15-9</i>
	<i>iii Updating an index.....</i>	<i>15-10</i>
16.	WEBIFYING YOUR ARTICLE – GETTING READY TO PUBLISH ON THE WEB	16-1
16.1	Objectives.....	16-1
16.2	Steps involved in webifying an article.....	16-1
	<i>i Paste images into the body of the article.....</i>	<i>16-1</i>
	<i>ii Classifying your article.....</i>	<i>16-1</i>
	<i>iii Add links to external sites – if needed.....</i>	<i>16-1</i>
	<i>iv Replace internal page references with hotspot links - if needed</i>	<i>16-1</i>
17.	PRINTING EDDESK CONTENT	17-1

17.1	Objectives.....	17-1
17.2	Printing edDesk articles	17-1
	<i>i</i> Printing from an open article	17-2
	<i>ii</i> Printing from a view where you have selected an article.....	17-3
	<i>iii</i> Printing several articles from a view.....	17-3
17.3	Printing views	17-5
	<i>i</i> Printing non-expandable views.....	17-5
	<i>ii</i> Printing the entire list of articles in an expandable view.....	17-6
	<i>iii</i> Printing part of the list of articles in an expandable view.....	17-6
17.4	Printing options	17-7
	<i>i</i> Printer tab.....	17-7
	<i>ii</i> Page setup tab.....	17-8
	<i>iii</i> Document styles tab.....	17-8
18.	FOLDERS	18-1
18.1	Objectives.....	18-1
18.2	Creating Folders.....	18-1
18.3	Putting articles in your folders	18-2
	<i>i</i> Quick way of copying several articles to your folder	18-3
18.4	Using folders to list articles	18-4
18.5	Moving articles to another folder.....	18-4
	<i>i</i> Adding an article to another folder	18-5
18.6	Renaming a folder.....	18-5
18.7	Removing a folder when you no longer need it.....	18-5
19.	TEAM TOOLS.....	19-1
19.1	Objectives.....	19-1
19.2	Inbasket	19-1
	<i>i</i> Looking at the Inbasket.....	19-2
19.3	Bulletin board.....	19-2
	<i>i</i> Posting an item to the bulletin board.....	19-3
	<i>ii</i> Deleting a posting from the Bulletin board	19-3
	<i>iii</i> Displaying bulletin board postings.....	19-4
19.4	Deadlines.....	19-5
19.5	Calendar / Team Calendar.....	19-6
20.	NON-TECHNICAL ADMINISTRATION OF EDDESK	20-1
20.1	Objectives.....	20-1

20.2	Setup tab.....	20-1
20.3	Sections	20-2
	<i>i</i> <i>Creating sections</i>	20-2
	<i>ii</i> <i>Editing sections</i>	20-3
20.4	Subsections	20-4
	<i>i</i> <i>Creating subsections</i>	20-5
	<i>ii</i> <i>Editing subsections</i>	20-6
20.5	Production schedule – volume and issue definitions	20-6
	<i>i</i> <i>Creating issue definitions</i>	20-7
	<i>ii</i> <i>Editing issue definitions</i>	20-8
20.6	Keyword topics	20-8
	<i>i</i> <i>Creating keyword topics and subtopics</i>	20-9
	<i>ii</i> <i>Editing keyword topics and subtopics</i>	20-9
20.7	Geography	20-10
	<i>i</i> <i>Creating Regions</i>	20-10
	<i>ii</i> <i>Editing regions</i>	20-11
20.8	Publication titles.....	20-11
	<i>i</i> <i>Creating title definitions</i>	20-11
	<i>ii</i> <i>Editing title definitions</i>	20-12
APPENDIX A: CREATING SIMPLE VIEWS		1
	Objectives	1
	Creating a simple view.....	1
	Going to your view	3
	Customising a view.....	4
	Designing views.....	6
	<i>Modifying selection conditions</i>	7
	<i>View properties</i>	8
	<i>Column properties</i>	11
	<i>Saving a view after you have designed it</i>	15
	Renaming a view.....	15
	Deleting a view	15
APPENDIX B: CREATING SIMPLE AGENTS		1
	Objectives	1
	Where to go for more help, or for agents requiring programming skills.....	1
	Creating Agents	2

<i>Agent properties dialogue box</i>	2
<i>Programmer's pane</i>	6
Saving your agent	9
Testing your agent.....	9
Deleting and disabling agents	10
<i>Deleting an agent</i>	10
<i>Disabling an agent</i>	11
Worked example – an agent to send a daily email that lists new and modified articles.....	11
APPENDIX C: USING WEBFORMS.....	1
Webforms.....	1
<i>Author tasks</i>	1
<i>Editor tasks</i>	4
<i>Client review of edited articles</i>	5
APPENDIX D: TROUBLESHOOTING AND FAQs.....	1
Troubleshooting	1
<i>I marked an article for deletion by accident</i>	1
<i>I really did delete an article</i>	1
<i>I want to print a view, but cannot get the Print View or Print Documents dialogue boxes to display</i>	1
Frequently Asked Questions	2
<i>Why are Volume and Issue fields pre-filled in my new article?</i>	2
<i>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.?</i>	3
<i>How do I make the text in an article larger, so it's easier to see when I'm editing?</i>	7
<i>I prefer to use my keyboard where possible. Are there any keyboard shortcuts?</i> .8	
YOUR NOTES AND COMMENTS.....	1