



# edDesk3 User Guide

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## Disclaimer

This is the first edition of the *edDesk3 User Guide*. Your feedback is appreciated.

If you find any errors, please email: [fborkman@itechne.com](mailto:fborkman@itechne.com)

Thank you.

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### References

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# **1. Introduction**

## **1.1 ABOUT EDDesk3**

edDesk3 is a browser-based content management system, where contributors and editors only have to be concerned with the content, classification of content and workflow. Templates control the appearance of your content when it is published to your website.

### **i Cute Editor**

edDesk3 uses Cute Editor, a leading online editor, as the editor for articles. For more information on the features of Cute Editor, please see its online help at:  
<http://cutesoft.net/asp/document/index.html>

## **1.2 OBJECTIVES**

To familiarise you with edDesk3 so that you can prepare articles for posting to your website.

By the end of this course you should be able to:

- log in to edDesk3
- navigate around the edDesk3 screen
- be familiar with edDesk3 menus
- use the Article Tree
- create an article
- format articles
- insert images into an article
- insert links to other sections, articles and websites into your article
- create subarticles / related articles
- classify articles
- create new classifications
- update the article workflow – from Concept through to Copy Ready
- enter the email of the contact person for the page
- create views
- use bulk update
- make an image or attachment globally available to other articles in your title
- delete articles
- undelete articles

- recognise the cause of common problems.

### 1.3 AUDIENCE

All people who need to use edDesk3 to maintain information on their website.

An appendix to this User Guide contains instructions on using the “non-technical administration”, however not all people will need to use this section.

This course and user guide does not cover editing layout templates as this is currently done by itechne, when you request changes.

### 1.4 NOTATION CONVENTIONS

This guide uses the following notation conventions:

<b>Bold</b>	screen names and for general emphasis
<i>Italics</i>	Menu option that you select
Lucida sans console	Field names
< <i>italics</i> >	button to be clicked to get to the next step
Courier	text of on-screen messages and prompts
century gothic	used for examples
<div style="border: 1px solid black; padding: 2px;">bordered century gothic</div>	Used for important points and handy hints that you should try to remember!

#### i Spelling

Australian English is used throughout this guide..

### 1.5 TERMINOLOGY

The terms listed alphabetically below are only in context of their relationship to edDesk3.

Article	Each story is called an article.
Title	The collection of articles for your website. An organisation may have several titles – for example, an Australian site, a New Zealand site
edDesk3	The browser-based application you use to create and edit articles and to manage the workflow for the publishing of those articles
Form	Any page that requires you to enter information so that content can be updated and saved.

Menu	A list of options that drops down (opens) when you click on the menu name. For example, the Home menu. When you click on Home a list of options opens for you.
Navigation pane	The menus down the left side of your screen. The menus listed here vary depending on the level of access you have.
Subarticle / Related article	<p>Large articles may be broken into smaller parts, called subarticles or related articles. Subarticles are “children” of articles.</p> <p>For example if you are reviewing digital cameras you may want each camera reviewed to be in a separate subarticle. They can be reordered easily within the article structure.</p>
Tab	Each article has a set of tabs that allow you to enter specific types of information about that article.
Toolbar – article	The toolbar that appears along the top of an article.
View	A way of organising the display of articles in a relevant manner. You can create your own views and share them with other people in your organisation. For example, you may create a view to list all articles created in the News section of your title in the past month.
Workflow	Where an article is up to in the entire production process – ranging from story Concept to Copy Ready.

## 2. Getting started

### 2.1 OBJECTIVES

By the end of this section you should be able to:

- log in to edDesk3.
- log out from edDesk3.
- change to another title
- navigate around the edDesk3 menus.
- use the Article Tree.

### 2.2 LOGGING IN

1. Open your internet browser.
2. Go to <http://eddesk3.itechne.com>
3. Email: enter your full email address.
4. Password: enter your password. This is initially set to your first name.
5. Click <Login>.
6. The **edDesk3 Welcome** screen displays, listing your most Recent Actions for your Title. These are recent changes you have made – if you have just browsed around and looked at articles, without making any changes your browsing is not listed.



Figure 1: edDesk3 Welcome screen, listing most recent actions.

### i Titles

Titles are the name of each publication and website. In the screen capture above the title is **Pacific Magazines**. A dropdown list shows you the other titles to which you have access.

When your login is created you will be added to various titles – if a title you need to use is not listed, please contact itechne.

Each title is self-contained – meaning that all articles, publishing jobs, classifications etc are for the selected title.

**To open another title:**



Figure 2: Title dropdown list.

1. Select a title from the dropdown list. Your browser window refreshes to display the details of the newly selected title

## 2.3 EDDESK3 MENUS

Menus are listed down the left side of your screen:

- **Home** – most commonly used menu. This is the menu you use to create new articles, drill through your Article Tree, change your password, Publish articles.
- **Content** – content manipulation. Some of the options available in the **Content** menu are the same as for the **Home** menu. These are the most commonly used options in edDesk3.
- **Production** – not often used for website maintenance, however, you can also publish articles from this menu and view the status of recent and current Publishing jobs. The **Production** menu is primarily for entering and viewing illustration instructions and article change requests – more for print production than web production.
- **Structure** – Use d to add new sections and classifications to your Title.

### Adding sections

If you want to add a new section to your Title you should speak with itechne staff to make sure that display templates are modified, so that your new section is displayed on your website.

- **Wizards** – mainly for administration – stay away from this one.

## 2.4 ARTICLE TREE

The **Article tree** is the easiest way to navigate around your Title. It is available in the **Home** menu.

The article tree reflects your site structure. Each site has Web site as the top level in your tree. Most then have the second level as Home. Site sections are within **Home**.




1. Click on the  next to Web site. Web site expands to list all sections in the Web site. In the screen capture below you can see **Home**.
2. Click on **Home**.



Figure 3: Drilling down through the Article tree.

3. When a section is expanded the  changes to .

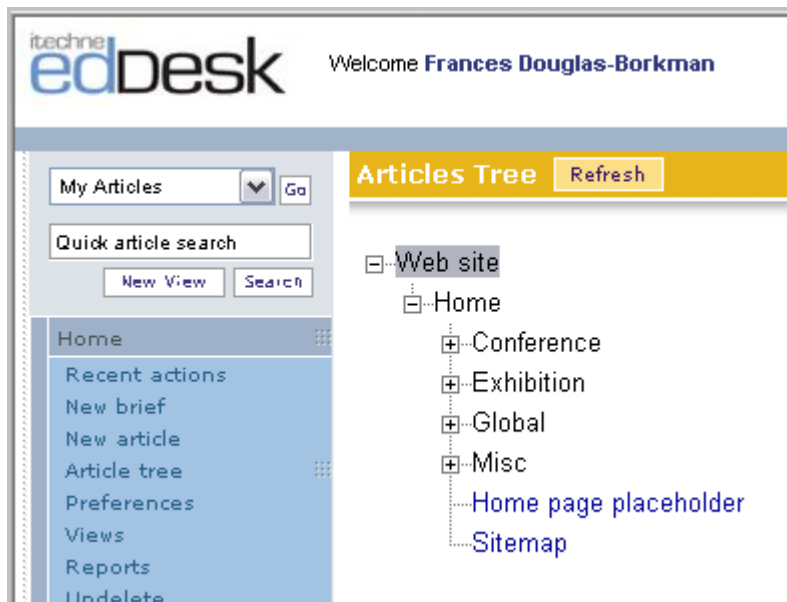



Figure 4: Article showing the Home section expanded, but the sections in Home still expandable (with the ).

#### Sections that don't seem to display on your website

Global, Fragments, Miscellaneous etc may be used as sections to contain information that is used across your entire website. This is often information that does not often change.

For example, Global / Fragments could contain Terms and Conditions of Use, Copyright information – information that you want to be available from each page in your website.

### 3. Creating an article

#### 3.1 OBJECTIVES

By the end of this section you should be able to:

- create a new article.
- complete the required tabs to position your article in the website.
- know the difference between Save and Apply.
- close your article.

#### 3.2 CREATE ARTICLE

1. Go to the **Home** or **Contents** menu.
2. Select *New article*. The **Article edit** window displays.
3. You will need to complete information in the article tabs. However, the information you enter can be updated at a later stage if required.
4. Complete the Info tab (see [3.4i: Info tab](#) below for details).
5. Save your article. Your article is saved and the **Article edit** window closed.

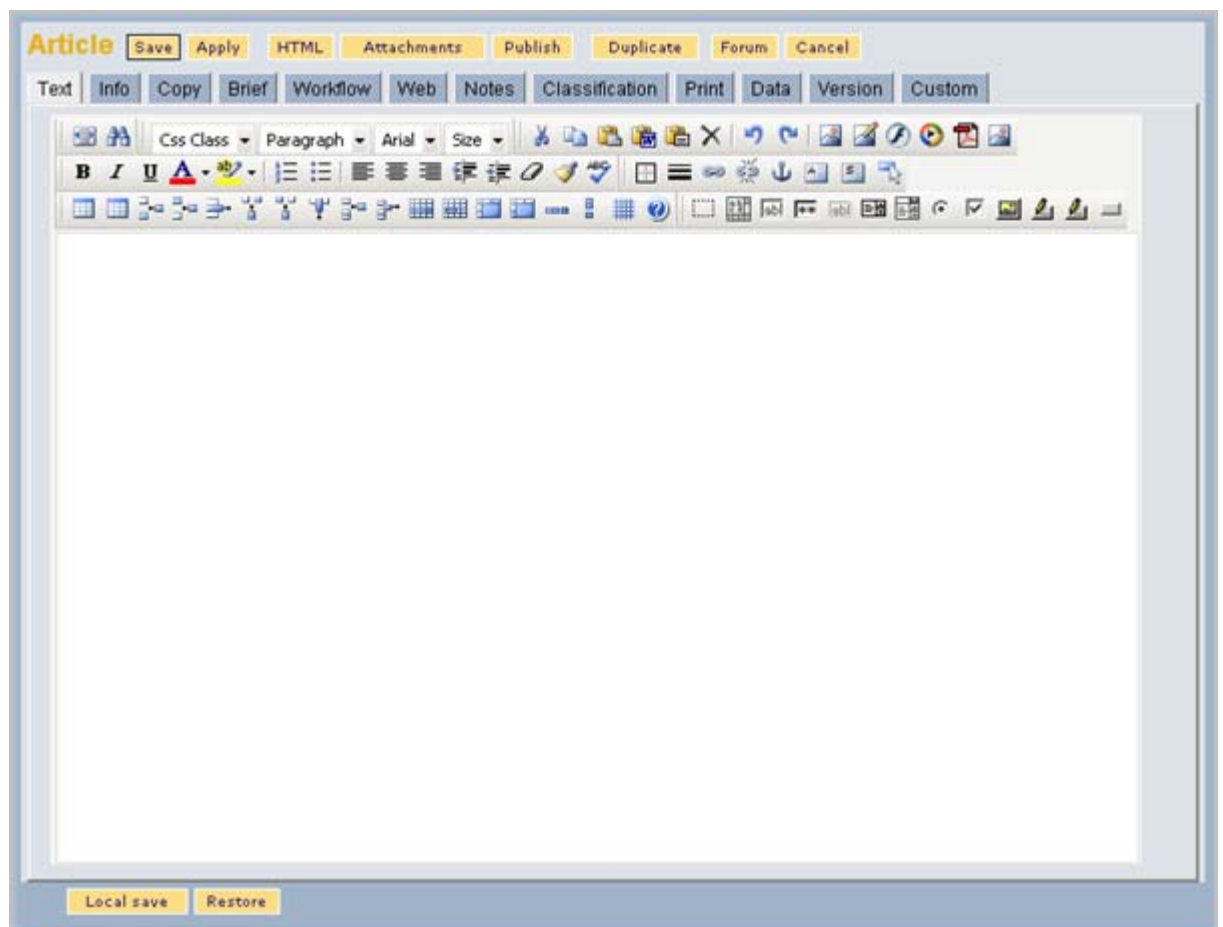


Figure 5: Article edit screen, with the Text tab active.

### 3.3 APPLY VERSUS SAVE

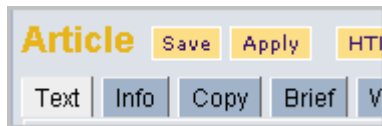


Figure 6: Save and Apply buttons as shown in the Article Edit window.

**Apply** saves your changes and leaves your article open for you to continue editing. It is a good idea to regularly apply your changes, in case your computer crashes – you don't want to lose too much work! (This is just as you would save regularly in MS Word or any other application.)

**Save** saves your changes and closes your article.

### 3.4 ARTICLE TABS

Each article has Tabs, into which you enter information about the article.

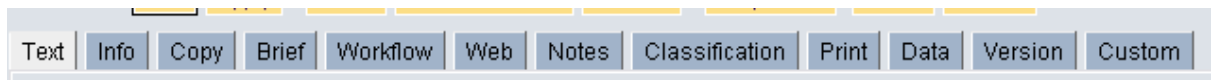



Figure 7: Article tabs - Text is active, hence a different colour.

You won't need to enter information into every tab, and you can update the tabs later.

For example, you may use the Info tab to select the section of your website that you are putting your article into – and later you can update that section if you need to move the article to another part of your website.

#### i Info tab

- **Subject:** Meaningful short subject for your article. Subject is used as the default link text when you [Link to another article](#).
- **Short title:** This is automatically copied from **Subject** but may be changed. This must be unique in each section because it is used as the page name in the Title's website – eg. jobs.aspx.
- **Headline:** automatically copied from Subject but can be changed.
- **Section:** the section of your Title that you want this article to be in.
- **Date created:** Date the article is created. If you want to change this, click on the [Calendar](#) icon  and select the required date.
- **Production schedule:** There is usually only one option. If you have more than one option and select another schedule you may interfere with when this article can be published. Production schedules allow publishing of articles at various stages of the Workflow – most people using edDesk3 don't need to worry about this one!

- **Author:** Name of person who wrote the article (not necessarily the same person as the one entering it into edDesk3).
- **Sequence:** 100 (use “century numbering” to order articles within a section – eg. 100, 200, 300 for first, second, third etc).

**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 then 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.

- **Words written:** automatically updated by edDesk3.
- **Keep checked out:** If you tick this box no other person can edit this article until you uncheck the box. Be careful!
- **Change request emails:** email address of person who is responsible for updating this page. Each Title will have a default email, but whatever you enter here will override that.

**ii Copy tab**

The fields in this tab are used for blocks of text that you want to differentiate from the body of your article. Display templates control the placement of the text on your webpage.

**iii Brief tab**

This tab is used for instructions to the article’s author, details on the number of words briefed, payment rate, person briefing the article out. The Brief tab is not often used for a website.

**iv Workflow tab**

The Copy tab is used to indicate where the article is up to in the publishing process, and for tracking change requests.

- **Copy:** where the article is up to in preparation for publishing to the internet. Articles can only be published when they are at Copy Ready status.
- **Keep checked out:** If you select this, the article can only be edited by the person who checked it out.
- **Change Requests:** Any changes you would like can be entered here. Your requests may be emailed to the author (entered in the Info tab).
- **Approval status:** only relevant for Changes that have been requested.

## v **Web tab**

The Web tab contains information used by search engines, and information used in the site navigation.

- **Keywords:** important words, separated by commas about this article.
- **Description:** general description of article.
- **Auto-classify:** automatically updates the Keywords and Description each day.
- **Include in XML:** leave this ticked so your article appears in the site navigation.
- **When to publish:** *On Change* is the default – this will publish the article whenever it is changed. You can manually publish articles if you want it to update faster than the automatic publishing schedule allows.
- **Publish from and Publish to:** leave this blank unless you want to publish only for a certain period.
- **Layout template:** look at other articles in the section you are working in. Use the layout template for those articles. If you leave it blank the default template is used.
- **Filename:** if you enter something here it is used instead of the Short Title (in the Info tab). Usually this is left blank.

## 3.5 **CLOSING YOUR ARTICLE**

If you have used **Save** your article is closed automatically.

If you have used **Apply** click on *<Cancel>*. Your article is closed with all the changes that were made up until you clicked *<Apply>*.

## 4. Editing an article

edDesk3 is used to edit all copy. This means that you don't have to save your copy in other programs and email it around. edDesk3 keeps your articles up-to-date with all changes that have been made. There is no risk of accidentally editing or reviewing an old version of an article.

Every member of a team can see where articles are up to in the production process, and which person in that team is currently working on an article.

You will often find that the original copy has been created in MS Word and emailed to you. You then copy and paste the text into the edDesk3 article. Use edDesk3 for all further editing of that article.

### 4.1 OBJECTIVES

By the end of this section you should:

- be able to open an existing article for editing.
- know when an article is in Full Edit mode or Quick Edit mode.
- be able to use the Paste from Word icon.
- be able to insert a table into an article.
- be able to format a table by merging cells where required.

### 4.2 GENERAL NOTES ABOUT FORMATTING TEXT

Most text formatting is very similar to MS Word. You can use a combination of the formatting toolbar or keyboard shortcuts.



*Figure 8: Formatting toolbar*

If you change fonts or add colour effects your formatting may be removed when the article is published. Display templates control the final appearance of text on the webpage.

### 4.3 OPENING AN ARTICLE FOR EDITING

1. Use the Article Tree to locate the article you want to edit.
2. Click on the subject of the article to edit.
3. The article opens in Full Edit mode.

#### i Full edit and Quick edit

If you use the Article Tree to locate and open your article it will be in Full Edit mode. This means that you have all article tabs available.

If you use Views to locate your article and open your article by clicking on the article subject, your article will be in Quick Edit mode, with fewer article tabs displayed.





Figure 9: Full edit tabs and buttons.



Figure 10: Quick edit tabs and buttons.


If your article opens in Quick edit mode and you want to change to Full Edit click *<Full edit>*.

### 4.4 PASTING IN TEXT FROM WORD

It is best to use the Paste from Word icon  when pasting in text from Microsoft Word. If you just use Paste  your web page may end up with some unusual (and undesirable) formatting. Paste from Word removes any Word specific formatting, ending up in a more reliable web page.

### 4.5 INSERTING TABLES IN AN ARTICLE


There are several ways of adding tables to articles. If you prefer, you can even create the table in Word and copy and paste it into edDesk3. Below are instructions for one method of adding a table and rearranging cells to suit the content.

1. Click on the Insert table icon .
2. Drag your mouse over the Draw table box to select the number of rows and columns for your table. Rows and columns can be inserted, deleted, merged and split later.
3. Your table is inserted.


**i To change the width of a table**

1. Right-click on the table and select *Table* then *Properties*.
2. Click on the *<Table>* button.
3. General: *width*: 100%  
This makes your table 100% of the width of the page.

**ii Merging cells*****Merging cells to the right***

1. Put your cursor in the leftmost cell to be merged with another cell.
2. Click on the Merge cells right icon .
3. Your cell is merged with the cell to the right of it.
4. To merge several cells to the right, you will have to repeat steps 1 to 3.


***Merging cells down***

1. Put your cursor in the topmost cell to be merged.
2. Click on the Merge cells down icon .
3. Your cell is merged with the cell immediately beneath it.
4. To merge several cells downward you will have to repeat steps 1 to 3.


**iii Splitting cells**

You can split merged cells. If you want to insert an extra column or row you cannot use Split cells; it is only for splitting cells that have been merged.

***Splitting cells to the right***

1. Put your cursor in the cell to be split.
2. Click on the Split cells right icon . Your cell is split once.
3. To split several time, repeat steps 1 and 2.







***Splitting cells down***

1. Put your cursor in the cell to be split.
2. Click on the Split cells down icon . Your cell is split once
3. To split several times, repeat steps 1 and 2.

**iv Inserting columns and rows into a table**

There is a variety of icons that let you insert cells, columns and rows. Experiment with these icons to learn their finer points of use.

1. Click on the cell in your table that you want to your inserted item above/below, before/after.
2. The icons are listed below. They all look similar, so move your mouse over each icon:

-  insert row above
-  insert row below
-  insert column to the left
-  insert column to the right
-  delete column
-  insert cells

**v Deleting columns, rows and cells**

1. Click on the column, row or cell that you want to delete.
2. The icons are listed below. Move your mouse over the required icon and click on it.

-  delete rows
-  delete columns
-  delete cells

## 5. Adding images to an article


Some people like to insert a table and put the image in one cell, others just insert the image and let the text wrap around it. If you have a lot of text it is easier to use wrapping.

### 5.1 OBJECTIVES

By the end of this section you should be able to:

- insert an image in an article.
- position the image in the article body.
- add alternative text to the image.
- wrap article text around the image.

### 5.2 INSERTING AN IMAGE

1. Position your cursor where you want to put the image.
2. Click on the Insert image icon . The **Insert image** dialogue box displays, listing images already attached to this article.

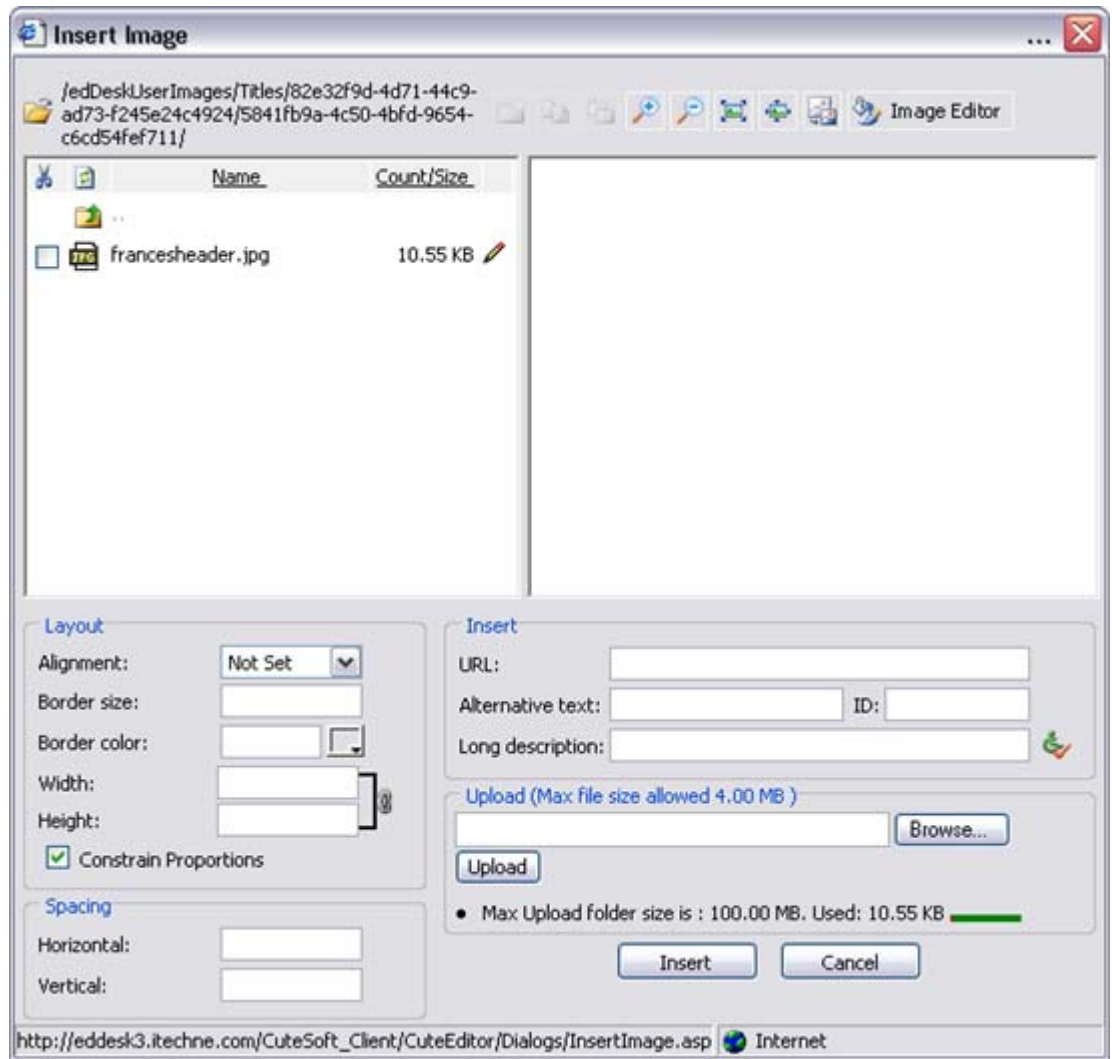


Figure 11: Insert Image dialogue box.

3. Click on <Browse> and navigate to the place on your PC (or network) where your image is stored.
4. Select the image and <Open>.
5. Click on <Upload>. The image is now available to your article (but has not yet been inserted).
6. Format the image as required (see instructions below).
7. <Insert> the image.

### 5.3 FORMATTING AN IMAGE

You can format your image before inserting it into an article by selecting options in the **Insert image** dialogue box. If you forget to do it before inserting the image it is easy to do later.

The instructions below pertain to when you are still in the **Insert image** dialogue box.

## i Select the image to be formatted

1. While you are still in the **Insert image** dialogue box, click in the box next to the image name.

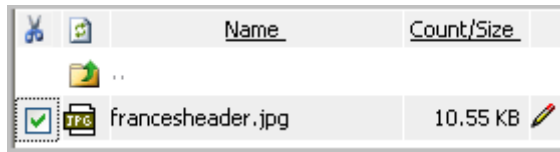


Figure 12: Image with the tick is selected

## ii Adding Alternative text

Alternative text is extremely important for people who use screen readers (such as the visually impaired).

1. Look at the **Insert** section of the **Insert image** dialogue box.
  - **Alternative text:** enter the text that you want to display as people either mouse-over the image or as the text is read to people by screen readers.
  - **Long description:** often the same as the Alternative text. This complies with current accessibility guidelines and standards.

## iii Wrapping text around an image

1. Look at the **Layout** section of the **Insert image** dialogue box.
  - **Alignment:** change this to *Left* to place the image at the left of your page (or *Right* to place it at the right of your page). Article text automatically wraps around the image. You can experiment with other settings.

## iv Spacing around an image


1. Look at the **Spacing** section of the **Insert image** dialogue box.
  - **Horizontal:** sets the horizontal space around the image. Measured in pixels.
  - **Vertical:** sets the vertical space around the image. Measured in pixels.
2. As you select the spacing the image preview changes, to indicate the effect of your new spacing.

## 5.4 FORMATTING THE IMAGE AFTER YOU HAVE INSERTED IT INTO YOUR ARTICLE

1. Right-click on the image.
2. Select *Properties*. The Properties dialogue box displays, with most of the formatting options as in [section 5.3: Formatting an image](#), above.

3. Set the formatting options as required.
4. <OK> the changes.

**i If you just want to set the text wrap around the image...**

1. Click on the image.
2. Click on one of the justification icons () to set the desired justification. The image is justified as you selected and text then wraps around the image.


## **5.5 USING TABLES TO ALIGN IMAGES**

1. Insert a two-column, one-row table.
2. Insert the image in the left column (or right column if you want text on the left and image on the right!).
3. Type text in the right column.
4. When you have enough text in the right column, move your cursor under the table and type the next paragraph of text.

## 6. Inserting links

You can insert links to other websites, articles in your site, PDFs and other files.

### Apply and the Insert link icon

When you <Apply> your changes, the Insert link to another article icon  disappears. You'll need to <Save> or <Cancel> from your article and reopen it for the icon to re-appear.

### 6.1 OBJECTIVES

By the end of this section you should be able to:

- insert links to another article on your website.
- insert links to another section of your website.
- insert links to another website.
- insert links to a PDF or other document that is on your website.
- check link properties.

### 6.2 INSERTING A LINK TO ANOTHER ARTICLE ON YOUR WEBSITE


1. Click on the Insert link to another article icon .
2. The **Insert article** window opens.




Figure 13: Insert link to another article window

3. Select your list criteria.
  - **Item to insert:** leave this as *Link to another article* (there are lots of choices – experiment with some if you like).
  - **Select first 100 articles from:** Select the section of your website, or the view that you want to list articles from. You can leave this at *All articles* to list the first 100 articles in your website. You can select various views and sections to only select articles that meet specific criteria (this returns a smaller list of matching articles – saving you time as your website grows).
4. The window refreshes, listing all matching articles.

5. Drill down to the required article and click on it.
6. The link is inserted into your article. The text used as the link text is the **Subject** of the article.

### 6.3 INSERTING A LINK TO ANOTHER SECTION ON YOUR WEBSITE

This link goes to the homepage of the Section.

1. Click on the Insert link to another section icon .
2. The *Sections* window opens.

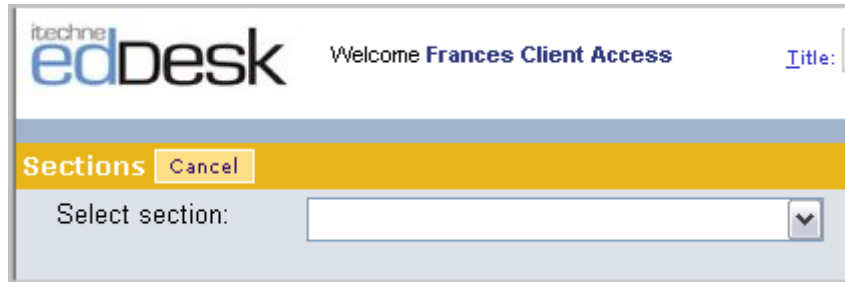



Figure 14: Insert link to section window.

3. Sections: Select the section you want to link to.
4. Your link is inserted, with the section name as the link text.

### 6.4 INSERTING A LINK TO ANOTHER WEBSITE

1. Open a new browser window and go to the site and page you want to link to.
2. Copy the URL (from the Address field in the browser).
3. In the article, type the text that you want to use as your link text.
4. Select that text.
5. Click on the Insert Hyperlink icon . The **Link Properties** dialogue box opens.

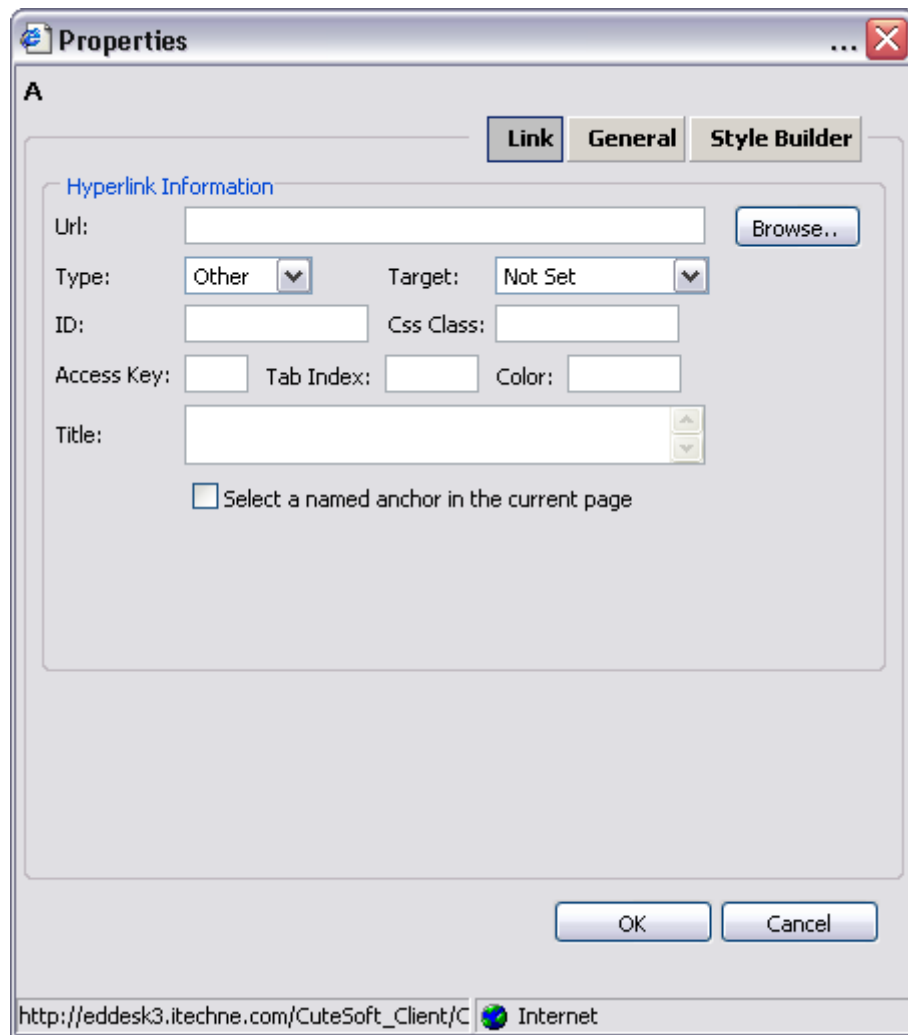



Figure 15: Link Properties dialogue box.

6. Look at the **Hyperlink** section.
  - Url: Paste the copied URL here.
  - Target: select whether you want the link to open in a new window (you can leave this as “Not Set”).
7. Click <OK>.

## 6.5 INSERTING A LINK TO A PDF OR OTHER DOCUMENT ON YOUR SITE

1. Type the text that you want to use as link text.
2. Select the link text.
3. Click on the Downloadable files icon . The **Downloadable files** dialogue box opens, listing all files currently available.

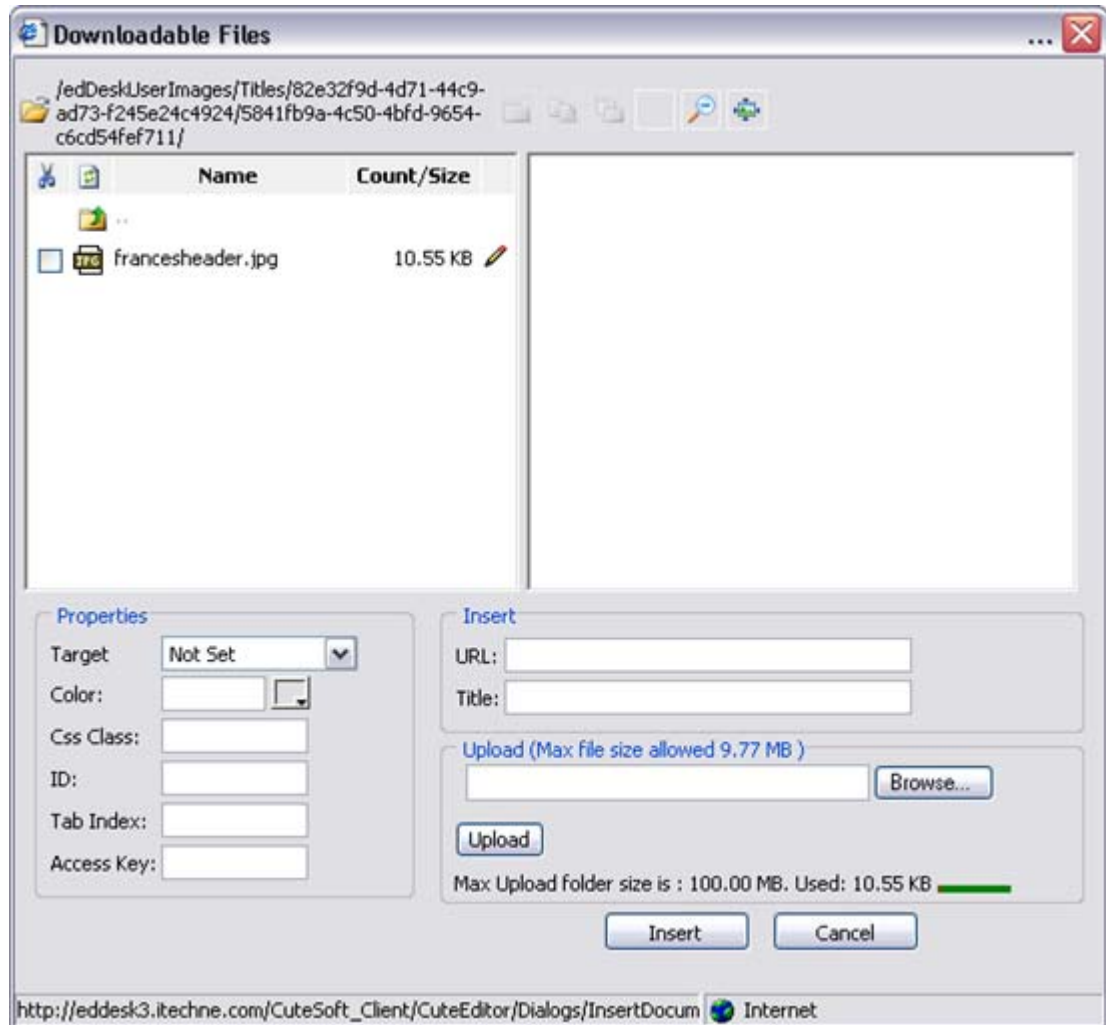


Figure 16: Downloadable files dialogue box.

4. *<Browse>* to the file you want to link to on your PC/network, select it and click *<Open>*.
5. Select *<Upload>*. The file is added to the list of available files for this article.
6. Click on the checkbox next to the filename.
7. *<Insert>* the link.

## 6.6 CHECKING LINK PROPERTIES:

1. Right-click on the link text and select **Link** then select *Properties*.

2. The **Link Properties** dialogue box opens, with the current link settings displayed.

## 7. Attachments – Local and Global

Attachments (images, PDFs, documents etc) can be either local or global.

- Local attachments are attached to a specific edDesk3 article.
- Global attachments are available to all articles in your website.

If you are likely to use an attachment in more than one article it is efficient to make the attachment global – then it is easily available for other articles in the title.

### 7.1 OBJECTIVES

By the end of this section you should:

- Know the differences between global and local attachments.
- Be able to change an attachment from being local to global.
- Be able to add a global attachment to an article.

### 7.2 MAKING AN ATTACHMENT GLOBAL

You will need to have inserted the image / downloadable file into an article before you can make it globally available to other articles.

1. Open the article with the attachments you want to make global.
2. Click on <Attachments>. All attachments to this article are listed.



Figure 17: List of all attachments to the articles called "related article"

3. Check each box next to the attachments that you want to make global.
4. Click on <Global>.

The attachment is now global and is available to all other articles in the title (your website).

#### i Using global files (images, doc, PDF etc)

1. For links to other documents (including PDFs) enter the text you would like to use as the link text. Select the text.
2. Click on the Insert an image, including global attachments icon (right-most icon of mountain with moon/sun – move your mouse over the icon for its description).

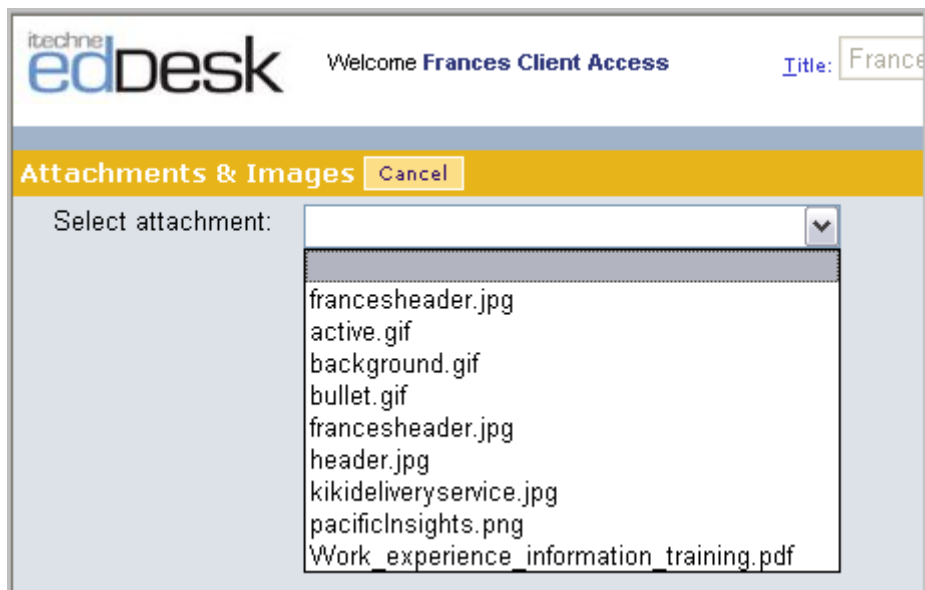


Figure 18: List of global attachments and images for the "Frances" title.

3. Select the attachment from the dropdown list.

**Note**

If you don't enter link text the PDF/doc filename is used as the link text.

Images are inserted wherever your cursor is positioned.

You will need to go to the Image Properties to add Alternative text and a Long Description.

## 8. Related articles / subarticles

Related articles are also known as “subarticles”. You would use them when you have an introductory article, with several sections that are large enough to be on their own page (so you don't end up with a very long single page). They are also useful if you have several pages that you only want to get to from another page.

For example, Pacific Magazines website has an article “WHO Magazine Promotions”. Within this article is a list of the current magazine promotions, which link to details of those promotions. The details are in related articles to the WHO Magazines Promotions article.

### 8.1 OBJECTIVES

By the end of this section you should:

- Be able to create a related article.
- Know when a related article may be used.

### 8.2 CREATING A RELATED ARTICLE

1. Open the article that you want to be the “Parent” article.
2. Click on <Related>. The new related article opens.
3. Click on the **Info** tab. It displays, with some information already filled in – it gets this information from the Parent article.

**Article** [Save] [Apply] [HTML] [Attachments] [Publish] [Duplicate]

[Text] [Info] [Copy] [Brief] [Workflow] [Web] [Notes] [Classification] [P]

Subject:  Multiple articles can be entered, one subject per line.

Short title:  Must be unique within

Headline:

Section:

Date created:

Production schedule:

Author:

Sequence:

Words written:

Keep checked out: ☐

Article Id: 7d8068fc-fa6d-46fe-b255-4b2a32f02e39

Related article type:

Figure 19: Info tab of the newly created related article.

4. **Info** tab fields that are automatically filled in:
  - Section: this is the same as the section that the Parent article is in.
  - Production schedule: same as for the Parent article (you don't have to worry about this anyway).
  - Related article type is *Subarticle*.
5. Go to the **Text** tab and enter your article text.
6. Complete details in other article tabs, as you would for any new article.
7. <Save> or <Apply> your changes.

## 9. Views

Views are ways of listing only those articles that meet certain criteria. You can create your own views and share them with other people (or keep them private).

The worst that can happen is that you don't list articles that you know are there – if that happens, you'll need to edit your view and check the criteria.

### 9.1 OBJECTIVES

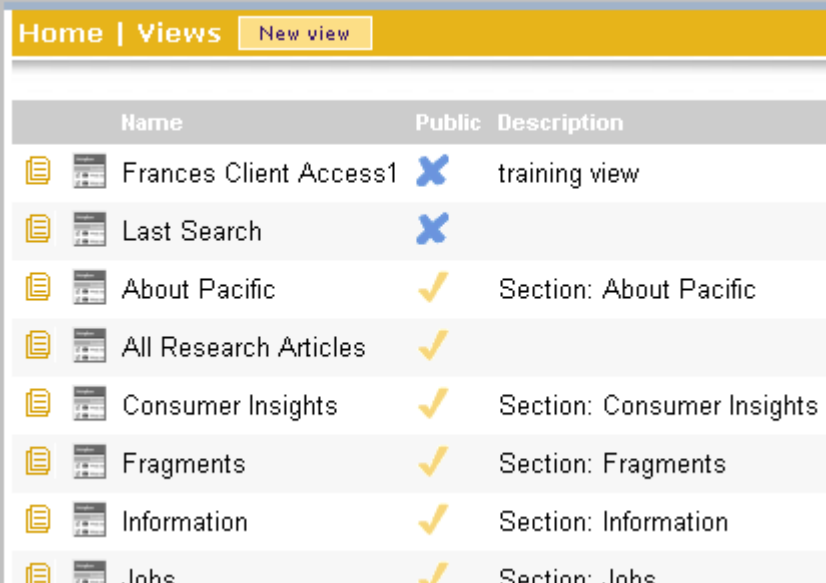
By the end of this section you should be able to:

- Use views to list articles that meet certain criteria.
- Create views for your own use.
- Create views to share with other people with access to your title.
- Use Bulk Update to update all articles returned in a view.

### 9.2 USING A VIEW

#### i From the Home menu

1. Go to the **Home** menu.
2. Click on *Views*. A list of all the views for the title displays.



Home   Views <span>New view</span>		
Name	Public	Description
Frances Client Access1		training view
Last Search		
About Pacific		Section: About Pacific
All Research Articles		
Consumer Insights		Section: Consumer Insights
Fragments		Section: Fragments
Information		Section: Information
Jobs		Section: Jobs

Figure 20: List of all views for the title. See that the first two listed views are private and only available to the person who created them.

3. Click on the Show articles in this view icon .
4. All matching articles are listed.

## ii From the search bar area

This feature is above the *Search bar*. It is an alternative way of loading views.



Figure 21: Dropdown list of views.

1. Select the required view from the dropdown list.
2. Click <Go>. The view is run.

## 9.3 CREATING A VIEW

1. There are two ways of getting to the **View edit** window to create a new view:
  - Look above the **Home** menu. Click on <New View>.
  - Go to the **Home** menu. Select *Views*. Click on <New View>.
2. The **View edit** window opens.

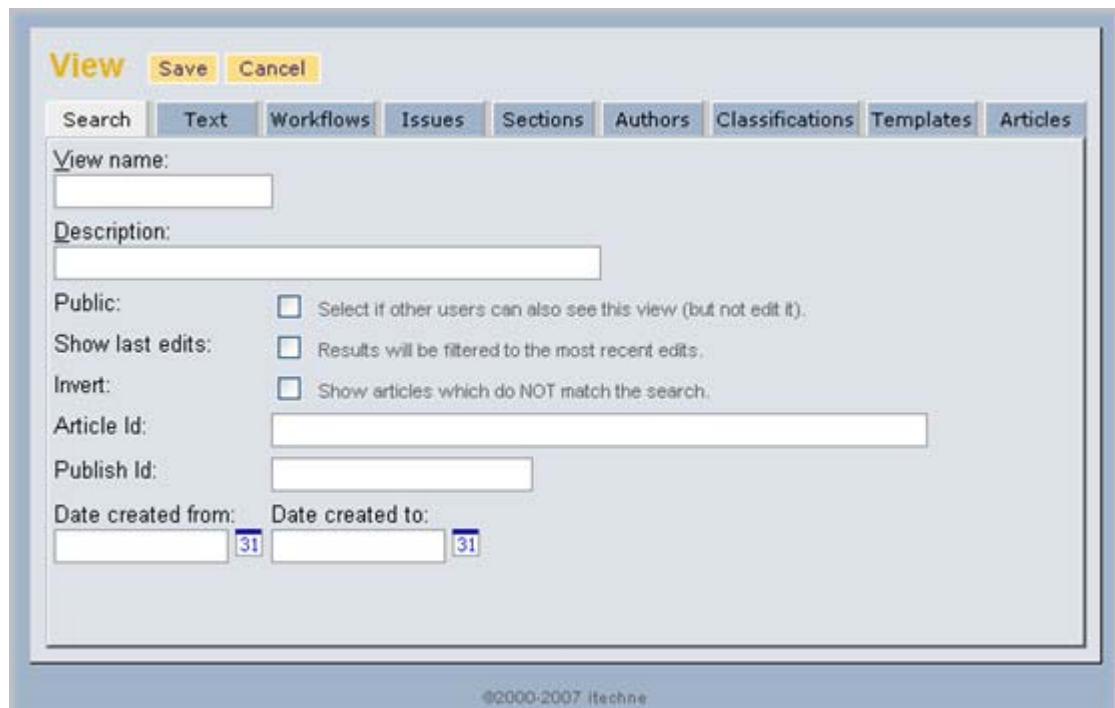


Figure 22: View edit window opens to let you create a new view.

3. Enter your criteria (see information on specific tabs, below) and <Save> your view.

There are several tabs where you can enter the view criteria. Most of these tabs and the fields within them are optional. Below are the most commonly used tabs and fields. It is safe to experiment with view settings as you are only listing articles that match your criteria – you can't accidentally delete or edit articles by just using a view.

**i Search tab:**

- **View name:** Enter a name for your view. The name is displayed in the Views list and the dropdown views listed. This is a mandatory field – you can't save your view if this is blank.
- **Description:** enter a description of the view. The description is displayed in a list of views.
- **Public:** Select this if you want other people who use your title to be able to use your view.

**ii Text**

This tab is not often used. You can search for text in articles.

**iii Sections**

Drill down through the sections and subsections in the title's hierarchy and select the section(s) that you want to display articles from. This is used in many views as it lets you display articles for particular sections.

**iv Workflows**


Select which stage of the workflow (and publishing process) you want to list articles for.

For example, all articles in the Copy workflow at Submitted, Sub1, Sub2 stages of the workflow.

**v Authors**

Select the authors for which you wish to list articles.

## 9.4 EDITING A VIEW

1. Go to the **Home** menu.
2. Select *Views*. All views are listed.
3. Click on the Edit view icon  next to the view you want to edit.
4. The **View edit** window opens.
5. Make your changes to the view and <Save>.

## 9.5 BULK UPDATE

Bulk update is a very useful feature – you can change a lot of information about articles. It is especially useful to add classifications to articles and update workflows.

### Bulk update also lets you bulk delete

Be very careful as you can delete articles using this feature. If you accidentally delete articles they can be undeleted.

1. Use a view that will list the articles you want to Bulk update.
2. Click on *<Bulk update>*. The **Bulk Update** window opens.

Figure 23: Bulk Update window.

3. Select the features you want to bulk update from the tabs in the Bulk Update window.

### All articles in the view are bulk updated

If you only want to update a few articles, it is best to either create a view that only lists those articles, or to update each article individually.

4. Click on *<Update>*.

## i Bulk update tabs

### Info

You can update articles so they are moved to a specific section, or have a specific author assigned. This is the tab where you can also elect to DELETE all articles.

### ***Brief***

This is not often used for websites – more for print publications. You can update the name of person who briefed out article, name of person to whom the article was briefed, rate per 1000 words, flat rate, date of briefing out.

### ***Classification***

You can drill down through the existing article classifications and add these to your articles. You can select as many classifications as you like. If you want to add a classification and it is not listed, you will need to create the classification and then use bulk update to add it to the required articles.

### ***Workflow***

Update which stage of the workflow process these articles are up to.

### ***Web***

You can set dates to publish these articles from / to. You can also change to different layout templates – be careful as the changes apply to all articles in the view – you could get undesired results that affect your website layout.

### ***Copy***

You can copy all the articles to another title. This may be useful if you are creating similar titles and don't want to manually create the entire structure. You can copy the articles to the new title, and then make your changes in the new title as required.

## 10. Classifications

Well-classified articles are easier for search engines to find, and also provide information to link with other similar articles. Classifications are often known as “tags”.

See the Wheels magazine website at <http://www.wheelsmag.com.au> for classifications at the end of each article. LookForward, <http://www.lookforward.com.au>, uses a “tag cloud” where tags used the most are larger than tags not as frequently used. In both sites the tags are links to other articles with those tags.

### 10.1 OBJECTIVES

By the end of this section you should be able to:

- Create classifications.
- Add several classifications to a parent classification.
- Add classifications to articles.
- Edit classifications.
- Be aware of the consequences of editing classifications.
- Make classifications unselectable.
- Delete classifications.

### 10.2 CREATING CLASSIFICATIONS

1. Go to the **Structure** menu.
2. Select *Classifications*. A list of all current classifications displays.

Structure   Classifications		
New classification Defaults: <input type="text"/> Add Gener		
Name	Selectable	Notes
Resources	✓	
Resources/Instructional Guides	✓	
Resources/Instructional Guides/quick references	✓	
Resources/Instructional Guides/training exercises	✓	
Resources/Manuals	✓	
Resources/Training exercises	✓	Exercises to be used in practical training sessions

Figure 24: List of current classifications.

3. Select <New Classification>. The **Classification** window opens.

**Classification**
Save Cancel

Basics

Parent:

Name: Split

Multiple values can be entered, one per line.

Selectable: ☒

Notes:

Figure 25: Classification window for creating a new classification.

4. You need to determine where your classification belongs in the hierarchy of other classifications.
  - **Parent:** select the classification that will be the parent of the new classification. If you want your new classification to be a top-level classification, leave this blank.

- **Name:** enter the classification. If you want to enter more than one classification for the parent, enter each classification on a new line.

Figure 26: Several classifications entered for the parent "Resources".

- **Notes:** more detail about a classification (eg. When to apply this classification). Notes display on the classification list (when you select **Structure** then *Classifications*).
5. <Save> your new classifications.

### 10.3 USING CLASSIFICATIONS

1. Open the article to which you want to add classifications.
2. Make sure the article is in Full Edit mode.
3. Click on the **Classification** tab. The classification hierarchy displays.
4. Drill down through the classifications hierarchy and select each classification that you want to add to the article.

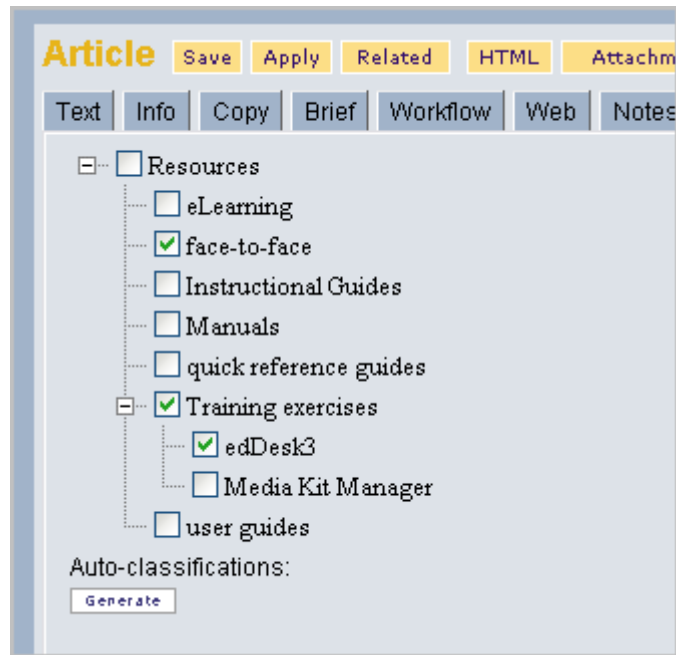


Figure 27: Classifications hierarchy with classifications to be added to this article ticked.

5. <Save> or <Apply> your changes to the article.

## 10.4 EDITING CLASSIFICATIONS

### Be careful

If you edit a classification, for example, to move it to a new parent or to change the wording, it will update in every article that has that classification.

Structure   Classifications			New classification	Defaults:
Name	Selectable	Notes		
Resources	✓			
Resources/eLearning	✓			
Resources/face-to-face	✓			
Resources/Instructional Guides	✓			
Resources/Instructional Guides/training exercises	✓			
Resources/Manuals	✓			
Resources/quick reference guides	✓			

Figure 28: List of classifications.

1. Go to the **Structure** menu and select *Classifications*.
2. Click on the Edit icon , next to the classification name.


3. The **Classification** window opens for that classification.
4. Make your changes as required.
5. <Save> the classification.

## 10.5 REMOVING CLASSIFICATIONS

### i Making a classification unselectable

This is the recommended way of ensuring that a classification can't be used in articles

The classification is still listed but cannot be added to any more articles. It is still in those articles to which it was added before making it unselectable.

1. Go to the **Structure** menu and select *Classifications*.
2. Click on the Edit icon , next to the classification name.
3. The **Classification** window opens for that classification.
4. Uncheck the box "Selectable".
5. <Save> the classification.

The Classifications list now shows the unselectable classification with a cross next to it.

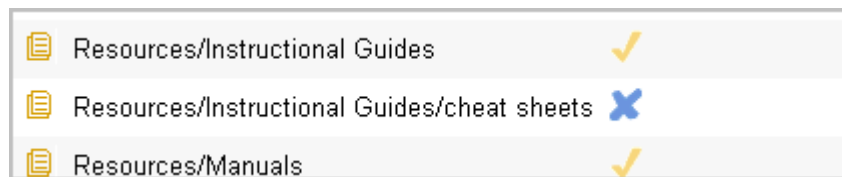


Figure 29: The classification of "cheat sheets" is now unselectable.

Articles still list the classification, however without a selection box.

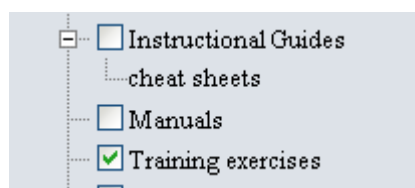



Figure 30: "cheat sheets" still listed in an article's Classification tab, however it cannot be selected.

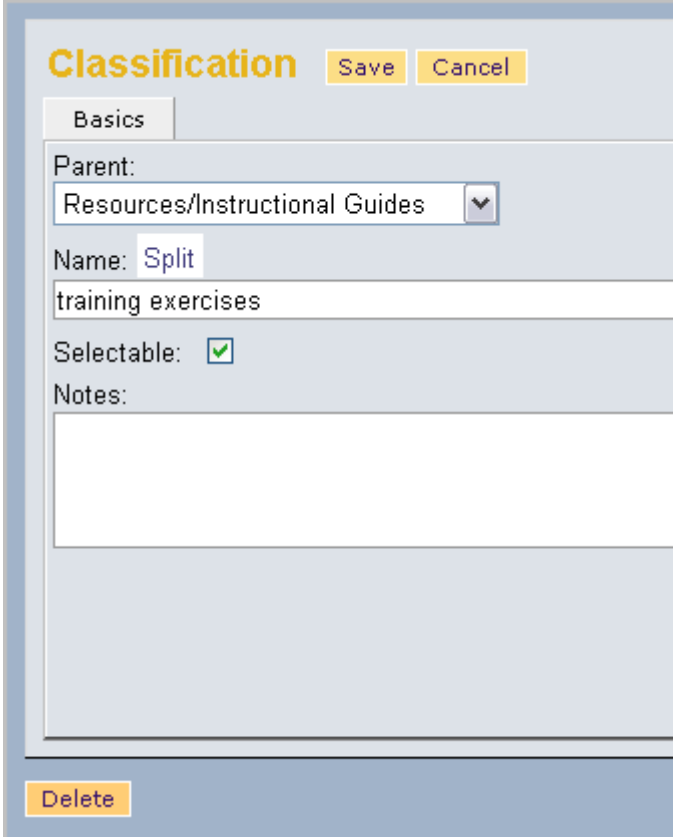
## ii Deleting a classification – not recommended except where it was created by mistake

Deleting a classification removes it from all articles to which it was once added.

Only delete a classification if you have created it by mistake. Deleting a classification takes that classification away from all articles that it had been added to.

It is much safer to make the classification unselectable.

1. Go to the **Structure** menu and select *Classifications*.
2. Click on the Edit icon , next to the classification name.
3. The **Classification** window opens for that classification.
4. <Delete> the classification. Your deletion is instant and the classification window closes. You return to the Classifications list, and the deleted classification is no longer on that list.



**Classification** Save Cancel

Basics

Parent:  
Resources/Instructional Guides ▼

Name: Split  
training exercises

Selectable: ☒

Notes:

Delete


Figure 31: Edit classification window open, with the Delete button allowing deletion of this classification. **DELETING A CLASSIFICATION IS NOT RECOMMENDED.**

## 11. Publishing

Not all users have access to Publish articles. If you need to Publish and do not have access please contact itechne.

Articles can only be published when they have a workflow status of **Copy Ready**.

There are two ways to publish articles:

- **Using the menus** – Publish is available from several menus. This method of publishing is the recommended way, as the indexes and site navigation are updated as well as the article.
- **Eye icon**  – from many views. This is used for an individual article if you have just made a text edit to that article. You only see this icon if you have Publish access. This method does not update the indexes and site navigation.

### 11.1 OBJECTIVES

By the end of this section you should be able to:

- Use the menus to publish articles.
- Set publishing criteria.
- Publish a single article from a view.
- Publish a single article from within the article.
- Check the status of recent publishing jobs.
- Unpublish articles.

### 11.2 PUBLISHING FROM MENUS

#### Important

Publishing from menus updates the site indexes and navigation. If you have renamed or moved the article you must publish from the menus.

Publish is available from the following menus:

- Home
  - Content
  - Production
1. Go to the **Home**, **Content** or **Production** menu.
  2. Select *Publish*. The **Publish** window opens.

Figure 32: The Publish window as reached from the Home menu.

3. You need to set your publishing criteria.
  - Select articles from: select an option from this dropdown list. This will publish all articles retrieved by the selected view or section of your website
  - Publish to: there is usually only one option
  - Publish all: leave this unchecked to only publish articles that have changed. If you select this ALL articles will be published.
  - Publish all images & scripts: check this to publish ALL images and scripts instead of only those that have changed.
  - Remove unpublished articles: only runs if you select Publish all. Removed all unpublished articles from the website, instead of leaving them as “orphans”.
  - Email me on completion: check this if you want to receive an email when the publish job has completed. You can use the Jobs view to view the status of publish jobs instead of (or as well as) being emailed
4. *<Publish>* all articles that meet your criteria.

### 11.3 PUBLISH FROM AN ARTICLE

#### Important

This method only publishes the article – no indexes or navigation will be updated. Only use this if you have changed the body of an article. If you have moved or renamed an article, publish from menus.

1. Open the article to be published.
2. Click on *<Publish>*.

## 11.4 PUBLISH FROM A VIEW

### Important

This method only publishes the article – no indexes or navigation will be updated. Only use this if you have changed the body of an article. If you have moved or renamed an article, publish from menus.

1. Go to the view that lists the article(s) to be published.

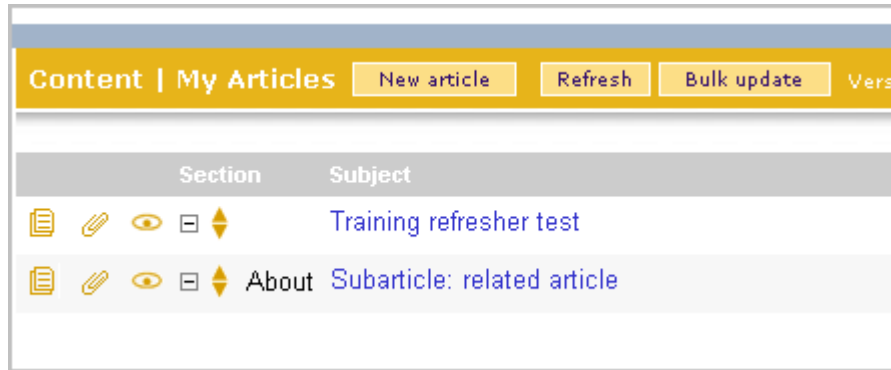



Figure 33: View "My articles" with the Publish icon displayed.

2. Click on the Publish icon . The article is published and the Publish icon disappears.
3. <Refresh> the screen to redisplay the Publish icon.

## 11.5 LISTING THE PUBLISHING JOBS

You can check the progress of your publishing jobs. The Jobs view gives you information on how much of your publishing job is complete and whether there are problems with the job.

1. Go to the **Production** menu.
2. Select *Jobs*.
3. A list of your recent publishing jobs opens.

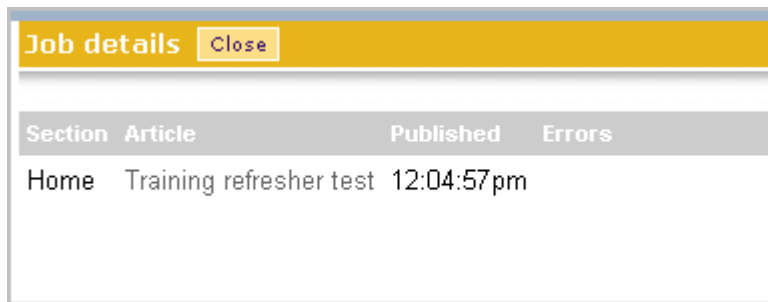
Production   Jobs <span>Refresh</span>										
Job number	Title	User	Output	Status	Ok	Total pages	% Complete	Created	Completion	Errors
 716	Frances	Frances Client Access	Dev	Completed		1	100%	12:04pm	12:04pm	

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Figure 34: Recent jobs listed for the user "Frances Client Access".

4. Click on the View Details icon  to see more detail about the listed job.

## i View details



Job details <span>Close</span>			
Section	Article	Published	Errors
Home	Training refresher test	12:04:57pm	

Figure 35: View details for Job - only one article was published in this job, and there were no errors.

1. Click on View Details icon to see more detail about this particular Job. Each article that was published as part of this job is listed. If an article could not be published you will see an error message.
2. *<Close>* the details to return to the Jobs list.

## 11.6 UNPUBLISHING ARTICLES

If you want to remove an article from your website it may be “unpublished”. This also removes any navigation and site indexes that point to this article.

1. Open the article you want to unpublish.
2. Go to the **Workflow** tab.
3. Change the **Copy** status to *Concept*.
4. *<Save>* your article.
5. Go to the **Home**, **Content** or **Production** menu and select *Publish*.
6. Select your publish options. Do not select "Remove unpublished articles" - there's no need.
7. *<Publish>* with your criteria.

## 12. Deleting articles

### 12.1 OBJECTIVES

By the end of this section you should:

- Know when to delete articles.
- Be able to delete articles the “safest” way.
- Know how to “undelete” articles.

### 12.2 DELETE WHEN...

- The article has been created by mistake.
- You have received a Save Conflict and have thereby created a duplicate article.

See [section 13.1: Save conflict – a potential error message](#) for information on dealing with Save Conflicts.

### 12.3 BULK UPDATE – DO NOT DELETE THIS WAY

If you select *<Bulk update>* from a view you are able to delete (all at once!) all articles listed in that view. Do NOT delete articles in this way unless they were all created by mistake. Articles that are merely no longer required should be either unpublished or have their workflow status changed to Archived.

### 12.4 DELETING AN ARTICLE – THE SAFE WAY


Only delete articles if they were created by mistake. Old articles may be archived, which will retain the article (and it can be restored from archive if it needs to be published again).

The safest way to delete an article is from within the article.

1. Open the article to be deleted.
2. Click on *<Full Edit>*.
3. Click *<Delete>* (the *<Delete>* button is at the bottom of the article).

#### i Undeleting an article

If you accidentally delete an article it can be retrieved.

1. Go to the **Home** menu.
2. Select *Undelete*. A list of recently deleted article displays.
3. Click on the Restore icon  next to the article to be restored.
4. The article is restored.

## 13. Miscellaneous (including troubleshooting)

### 13.1 SAVE CONFLICT – A POTENTIAL ERROR MESSAGE

If you close an article's browser window without either Cancelling or Saving your article you will probably receive a "Save Conflict" error.

			Rebecca's Article	HTML	Rebecca Mc
			Subarticle: Rebecca's Article (Save Conflict)	HTML	Rebecca Mc
			Subarticle: Rebecca's Article (Save Conflict)	HTML	Rebecca Mc

Figure 36: Save Conflict articles as displayed in a view.

Articles that have a "Save conflict" will be copied – there will be at least two of these articles.

#### i What to do

1. Open both of the Save Conflict articles.
2. Manually compare the articles. You will need to decide which article you want to keep, and then delete the other Save Conflict article.
3. Make any required changes to the Save Conflict article that you intend keeping. You can copy and paste content from any Save Conflict article to the one you intend keeping.
4. Go to the **Info** tab of the article.
5. **Subject** : Delete the words - (Save Conflict).
6. <Save> your article.
7. Go to the Save Conflict article that you don't want to keep.
8. <Delete> the article.

### 13.2 SEARCHING FOR ARTICLES

edDesk3 search is quite basic. The Article Tree and Views are the most common ways of locating articles and Search is rarely used.

1. Click in the field Quick article search (above the **Home** menu). When you click here, the text "Quick article search" is removed.



Figure 37: Search fields.

2. Type the word to search for.
3. Click <Search>.

#### Notes

If you enter more than one word the Search uses the OR operator – so you get the articles containing either the first word OR the second word.

A maximum of 20 articles is returned by the Search.

### 13.3 CHANGING YOUR PREFERENCES – INCLUDING YOUR PASSWORD

Use **Preferences** to update your name, email address and password.

1. Go to the **Home** menu.
2. Select *Preferences*.
3. A window for **Your Preferences** opens.
4. Make the required changes and <Save>.



### 13.4 FORGOTTEN PASSWORD?

1. Go to the **edDesk3 Login** screen.
2. There is a question “Forgotten your password? Click here”.
3. Click on “Click here” (note, it doesn’t look like a link!).
4. An email is sent to the administrator – you will then receive a new password.
5. Login with the new password and go the **Preferences** to update to a password that you will remember.