Superdesk

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User Manual

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Foreword

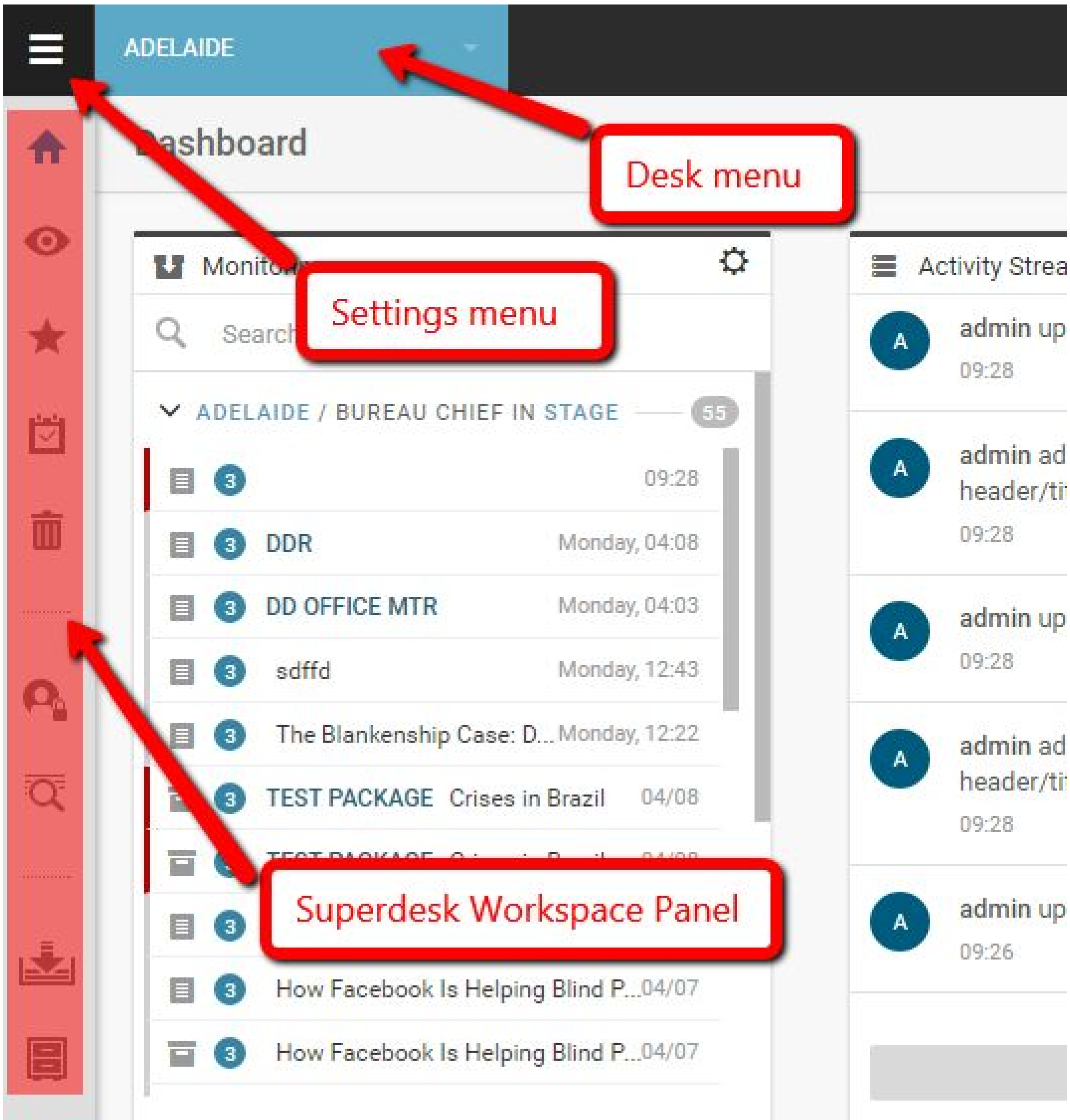
Welcome to Superdesk beta. Much like the software itself, the documentation is undergoing constant revision. Screenshots may not represent the current beta version and some functions may work differently than explained. If you find any inconsistencies, grammar issues, or have general feedback about the documentation, please send us an email to contact@sourcefabric.org. Special thanks to Nareg Asmarian and Andrew Lasky for putting up with our barrage of questions.

What is Superdesk?

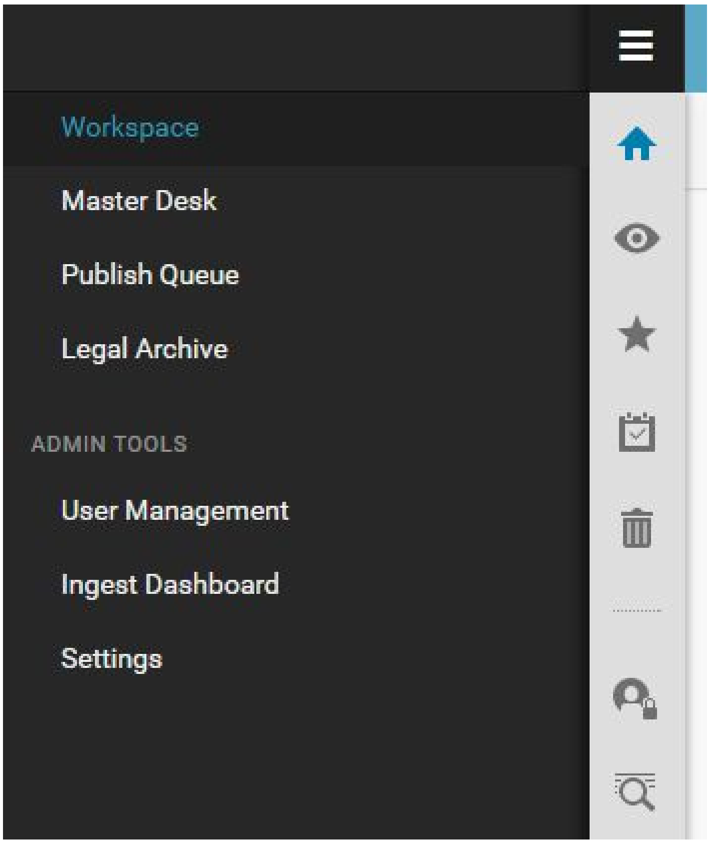
Superdesk is a powerful workflow management solution for newsrooms. It is a collaborative tool for curating, sorting and publishing news with contributors from around the world. With an intuitive user interface, Superdesk makes the life of newsroom staff easier by removing the complex underlying technology and enabling journalists to focus on creating and producing high-quality content. With Superdesk, all of the newsroom tasks are brought together in one platform. Publishing across multiple media outputs is also possible.

Superdesk enables multiple users to collaborate within the same application, at the same time. All users are able to search and read the available content, but roles can be assigned to limit the actions of specific users. Superdesk has a customizable interface in which all the roles and topic desks are configurable.

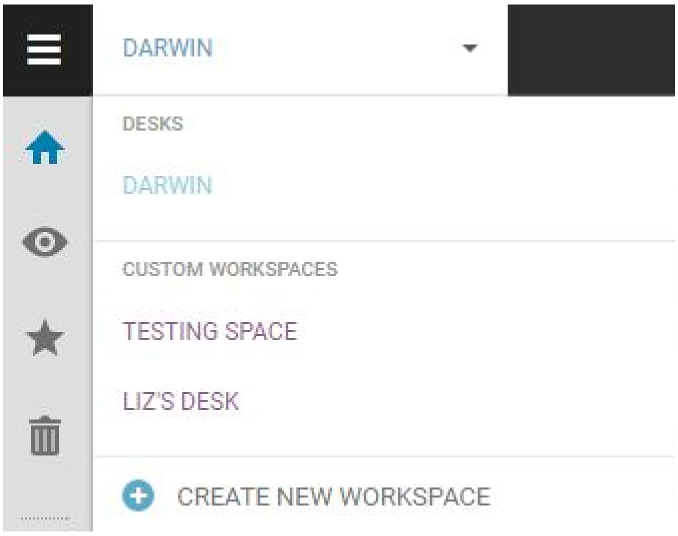
How to Navigate Superdesk



The Settings menu located at the top-left corner allows users with appropriate permissions to access the master settings for all the topic desks, users and news sources. Depending on your permissions, you will see different items in this menu. Clicking on the Settings menu icon will open a new menu on the left. In addition to accessing the user and desk settings, this is also where you can access your legal archives, dictionaries and publishing queue. In general, most of the tools in the Settings menu will only be accessible to the users with administrative privileges.



To exit the Settings menu, click on the *Workspace* link at the top of the menu, or click on any of the icons in the Workspace Panel.



Desks are the way teams are organized within Superdesk. They are similar to desks that would be found in a traditional newsroom; for example sports desks, foreign desks, etc. The Desk menu is the blue drop-down menu found to the right of the Settings menu icon. It always displays the name of the topic desk you are currently working on. Users can only view the topic desks to which they are assigned. Each user also has a Personal

Workspace, only accessible to themselves. In the Desks menu, shared desks are in blue and Personal Workspaces are in purple.

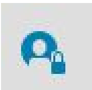
Below the Settings menu is the Workspace Panel which allows you to navigate within the desk that is currently selected.

 Dashboard - Provides an overview of the current topic desk through customizable widgets

 Monitoring - Shows all stages for the selected topic desk, but with search and filters available

 Highlights - Lists of articles that are user curated

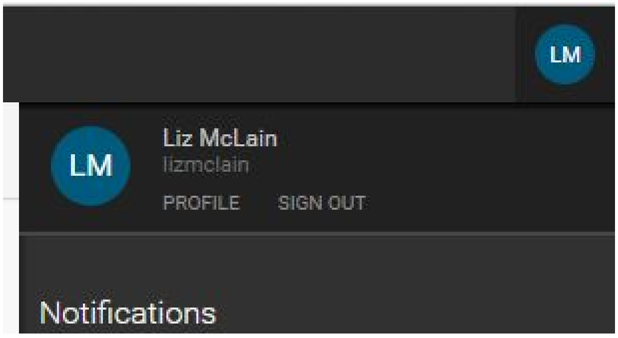
 Spiked - Shows articles that have been removed from the selected desk

 Personal - Private workspace for items that cannot be viewed by other users

 Search - Allows you to search and browse articles in Superdesk's internal repository, Ingest or any other content repository Superdesk is aware of and to create Saved Searches

At the very bottom of the Superdesk interface you'll find your Workspace Bar where you can navigate between multiple items you're working on. An article will remain open until you close it. If you navigate away from the article that you are editing (without closing it) it will automatically minimize to the Workspace Bar.

In the top-right section of the Superdesk interface you'll find your user icon. Clicking on your User icon gives you the option to to log out of Superdesk or to edit your user profile.



To edit your user profile, click *Profile*, under your username. Editing your profile allows you to change your profile picture, input contact information and change your password.

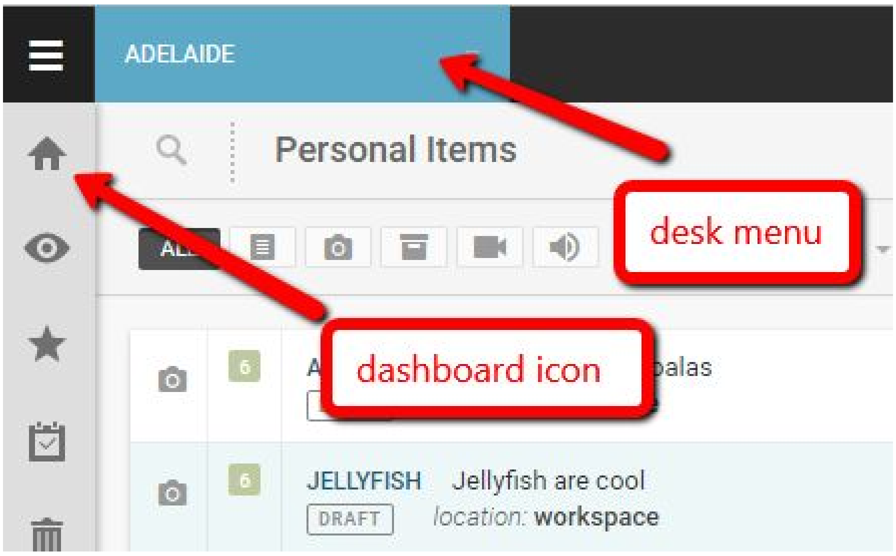
 This is the Create icon.

In the Superdesk main interface, you will also find the blue Create icon. It will usually be in the top-right below your user icon. On your Dashboard, the Create icon will allow you to add widgets to your Desk. In all other tabs, the Create icon allows you to make new articles, new packages or to upload items from your personal computer to Superdesk.

Every time you log into Superdesk, you will be taken to the Dashboard of a topic desk that you're assigned to. If you are assigned to multiple topic desks, you will be taken to whichever topic desk comes first alphabetically or whichever is assigned as your default topic desk in your user profile. This can be changed in the User Management section of the Settings menu.

Dashboard and Widgets

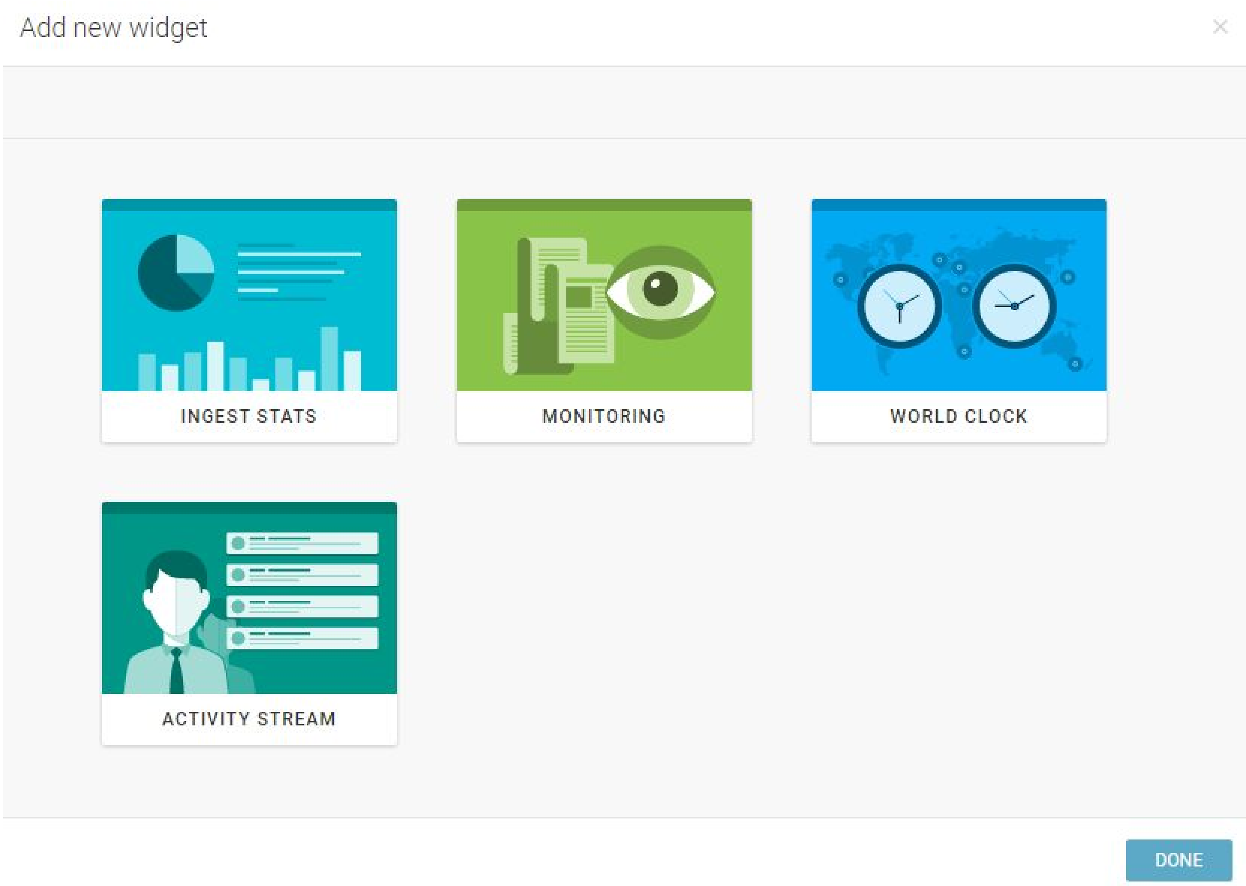
When you log into Superdesk, you will be taken to your Superdesk Dashboard. The Dashboard gives you an overview of the topic desk you are currently working on. Your Dashboard can be filled with widgets to suit your needs. You can always return to your Dashboard by clicking the house icon in the Workspace Menu, on the left.



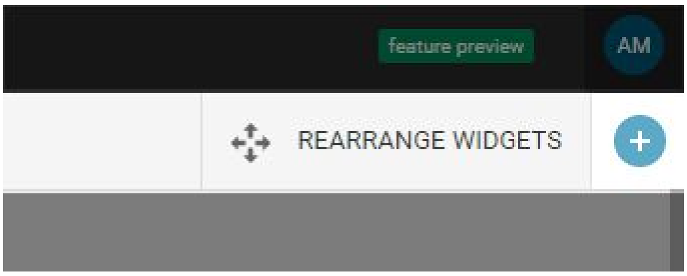
You can only view the Dashboards for topic desks you're assigned to. Every user also has a Personal Workspace which is only accessible to them. At the top-left of the Dashboard, you'll see the blue drop-down Desk menu. It will display the name of the desk you're currently working on. Click on the desk name and you'll be able to view all desks you're assigned to. Different desks can have different dashboard setups depending on your needs. Changes that are made to a Dashboard on a desk used by multiple users will be visible to all users assigned to that topic desk. Widgets on the Dashboard for your Personal Workspace are visible only to you.


This is the Create icon. On the Dashboard, it allows you to add widgets.

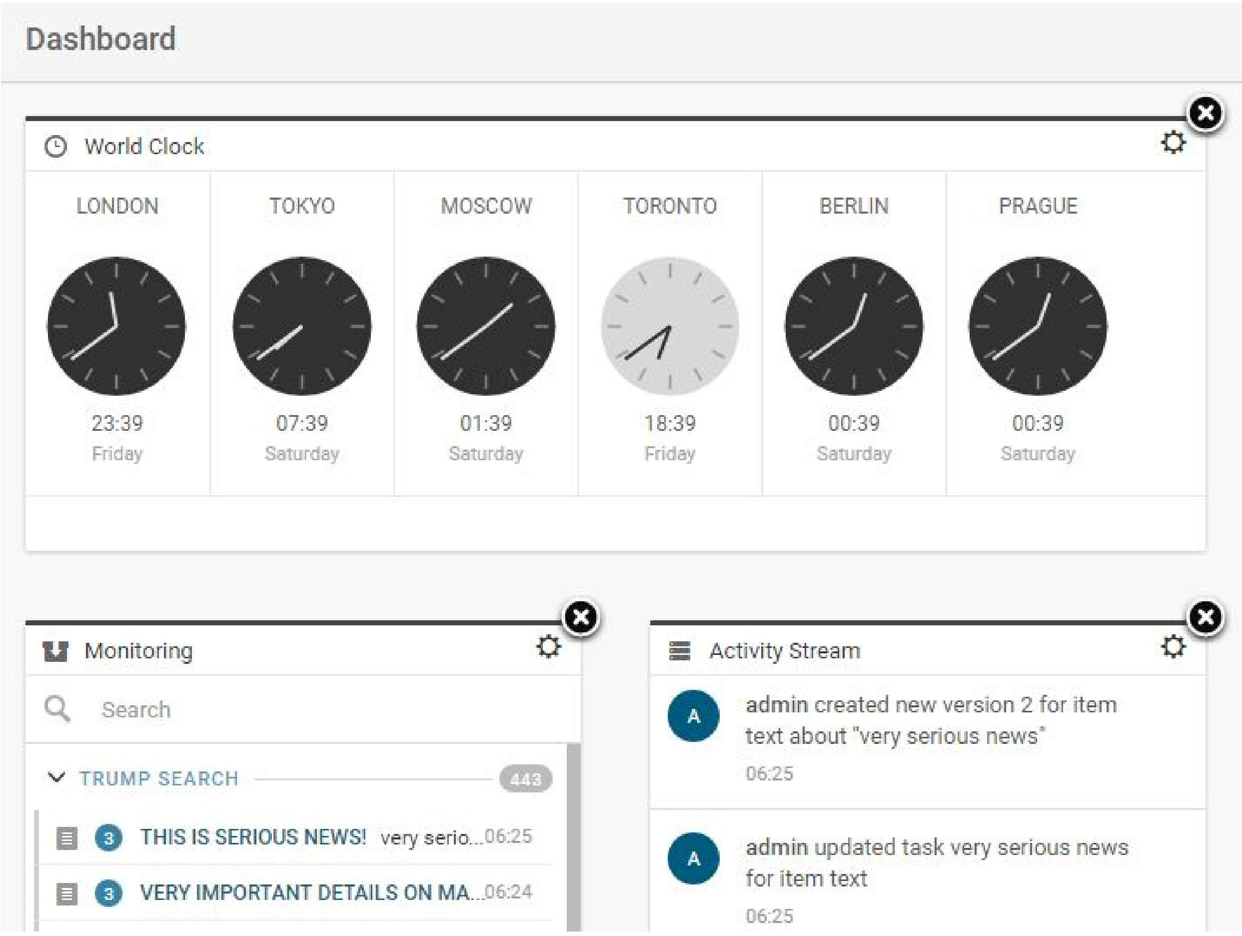
You can customize the widgets on your Dashboard by clicking the Create icon at the top-right section of the page. When you click the Create icon, a new window with widget options will open. Select the type of widget that you would like to add to your Dashboard, then click *add this widget*. Once you've selected the widget you would like to add, click the *Insert this Widget* button to place the widget on your Dashboard. You can add multiple displays of the same type of widget to any Dashboard.



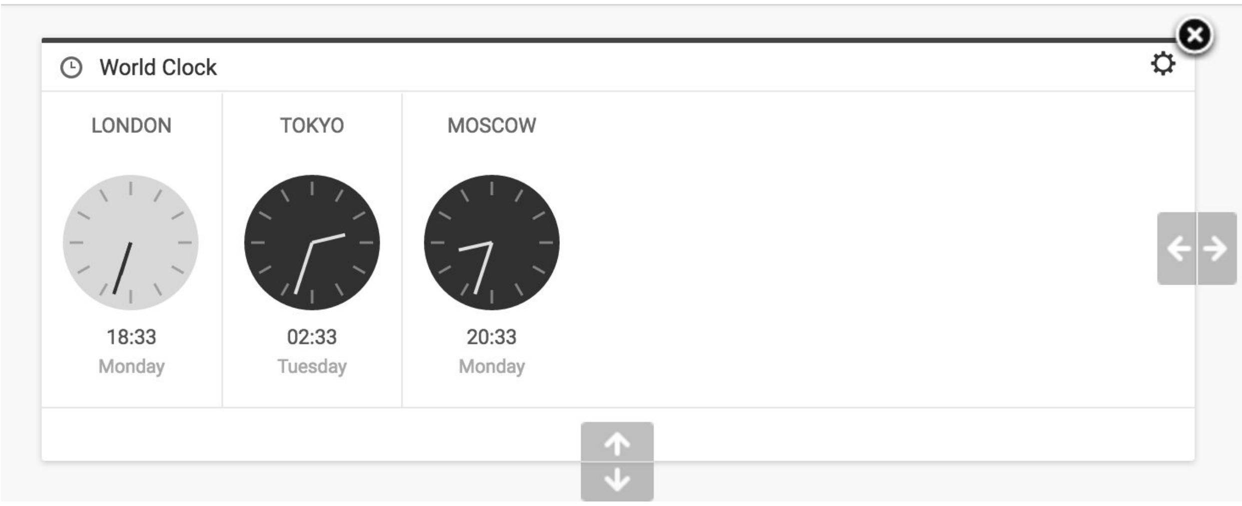
You can arrange the widgets on your Dashboard in any configuration you like. Click the *Rearrange Widgets* button at the top-right corner of the main interface, then select and drag a widget to the desired area of your Dashboard to place it.



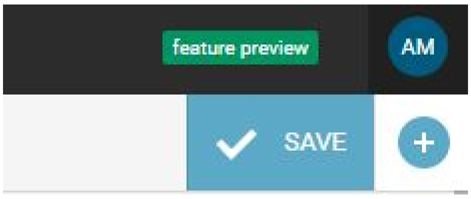
The *Rearrange Widgets* button also allows you to delete widgets that you have inserted. To delete a widget, click *Rearrange Widgets* and you'll see an x appear in the top-right corner of each widget. Click x for each widget you'd like to delete and then hit *Save* in the top-right of the Superdesk interface to keep these changes.



You can also resize widgets by clicking the grey arrows that appear at the edges of each widget when you hover over them.

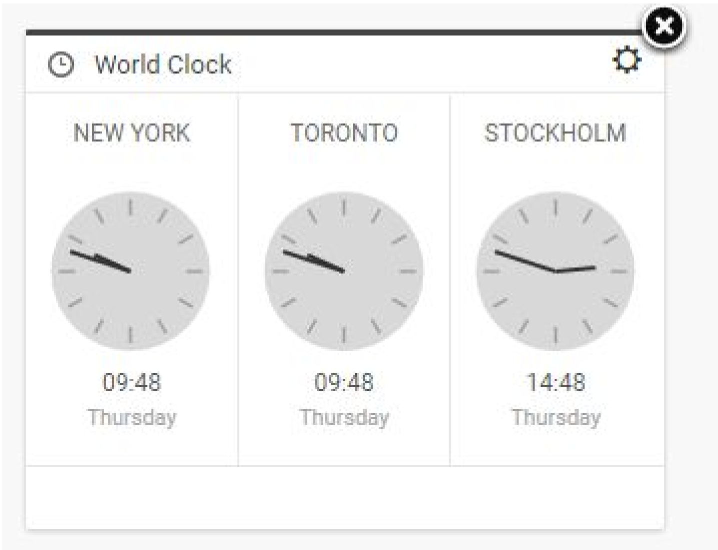


Click and drag the body of the widget to move it to a different spot of the Dashboard. The widgets will fill the space as efficiently as possible. If there is a gap above one of the widgets, it will automatically move up to fill the space.

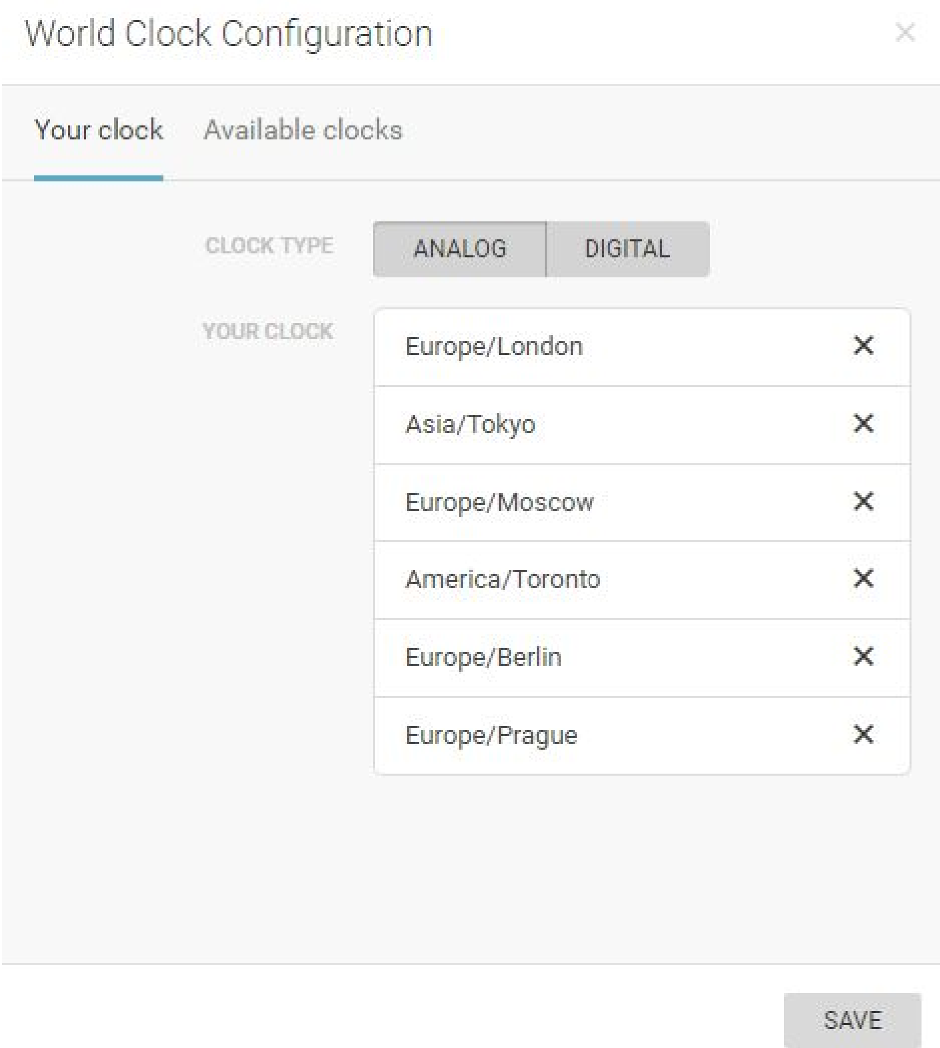


When you are satisfied with the size and layout of your widgets, click the blue *Save* button at the top-right corner of the main interface.

Each widget also has several settings associated with it. Click the gear icon in the top-right of the widget to adjust the settings for each individual widget.

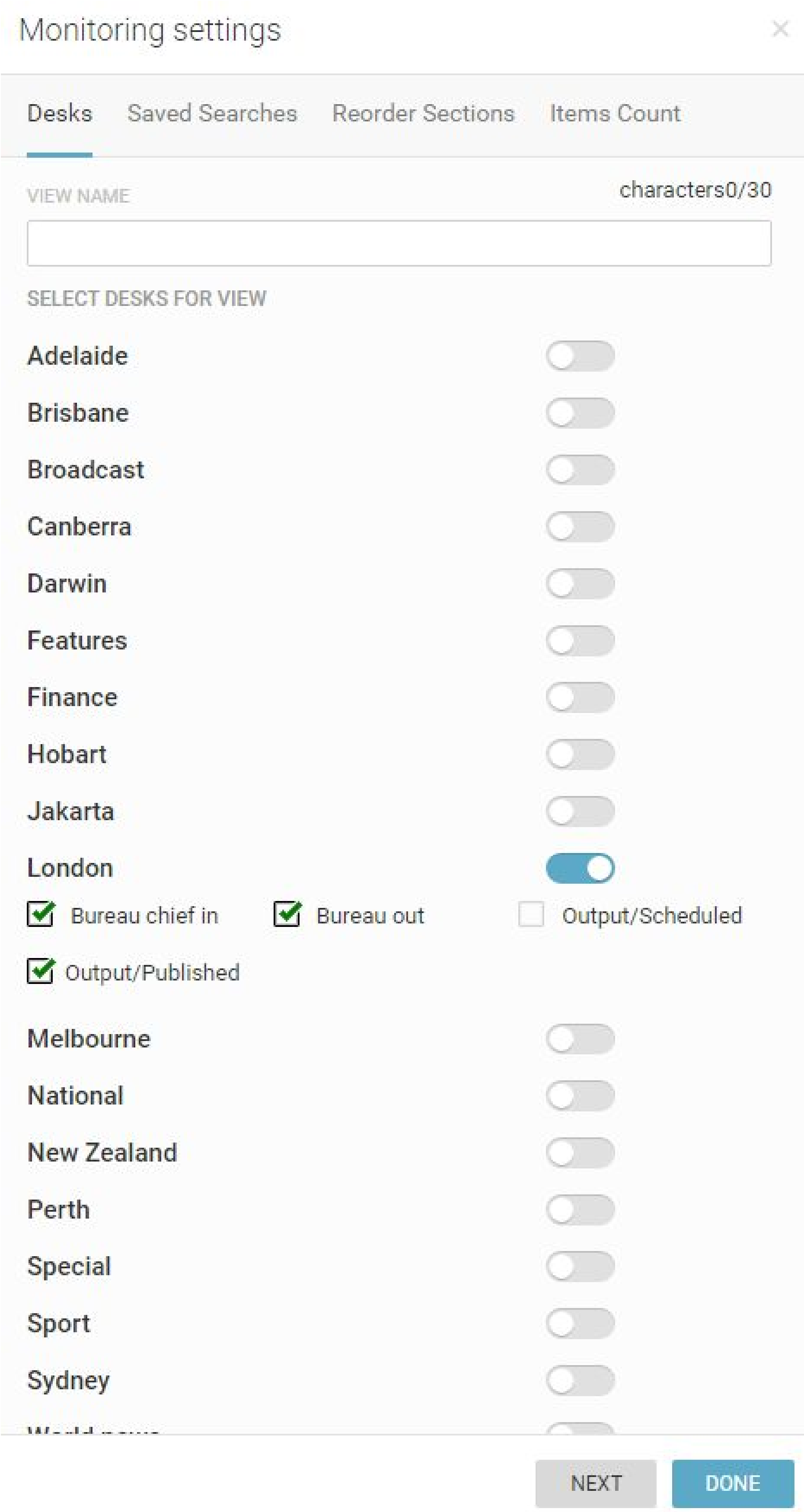


The World Clock widget has customizable clocks for all time zones. Click the gear icon in the top-right corner of the widget to open the World Clock Configuration window. The *Your Clock* tab in the World Clock Configuration Window displays the clocks that are currently used in your World Clock widget.

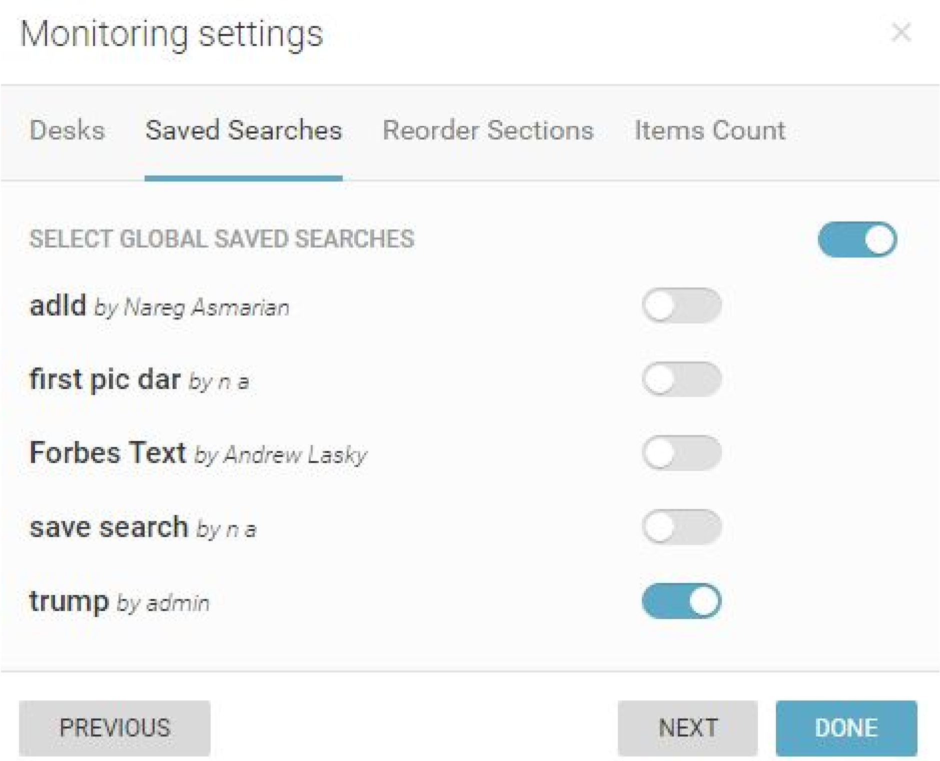


To remove a clock, click the *x* beside the clock name. To add different clocks, click on the *Available Clocks* tab and scroll through the time zones. When you click on a time zone, it will automatically add itself to the *Your Clock* tab. If you set more than three clocks, you will have to adjust the size of your widget to display them all at the same time. In the World Clock Configuration window, you can switch between digital and analog displays under the Your Clock tab. When you are satisfied with the clocks you have chosen, click the *Save* button at the bottom of the window.

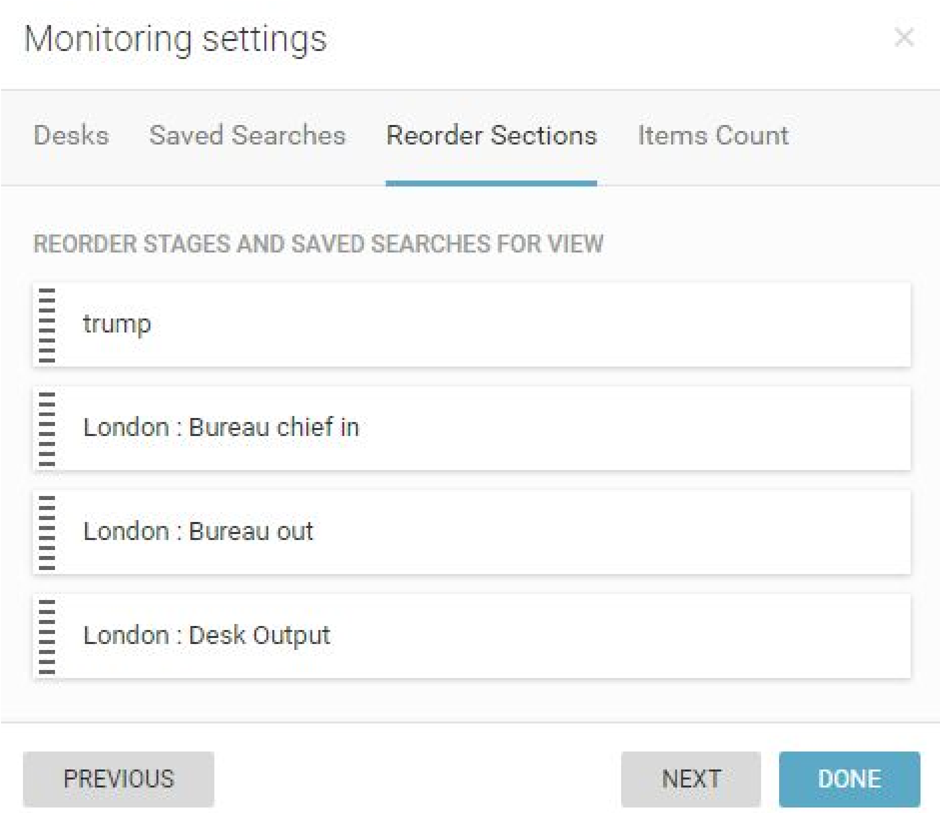
The Monitoring widget allows for an overview of desk input (articles created or fetched to a desk), output (published items), saved searches and current projects. To adjust the Monitoring settings, click the gear icon in the top-right corner of the monitoring widget. Because you can have several Monitoring widgets on the same desk at the same time, the first textbox in the Monitoring settings window gives you the option to rename your Monitoring widget.


Monitoring settings
×
Desks
Saved Searches
Reorder Sections
Items Count
VIEW NAME
characters0/30
SELECT DESKS FOR VIEW
Adelaide
Brisbane
Broadcast
Canberra
Darwin
Features
Finance
Hobart
Jakarta
London
Bureau chief in
Bureau out
Output/Scheduled
Output/Published
Melbourne
National
New Zealand
Perth
Special
Sport
Sydney
NEXT
DONE

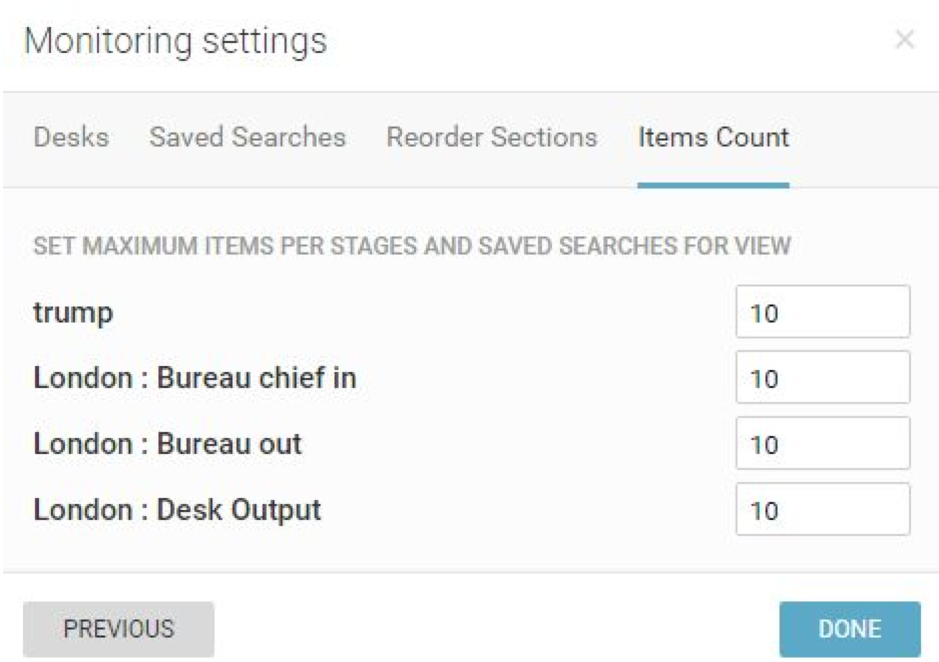
The topic desk input, output and current projects are called stages. In the Monitoring settings window, under the Desks tab, you can select the stages that you wish to view in your Monitoring widget. You can only select the stages in Monitoring Settings associated with the current topic desk. The only exception to this occurs if a stage is marked for Global Read by an administrator in the Settings menu under Desk options. Stages that are marked for Global Read can be added to any Monitoring window in any topic desk. If a stage is currently empty, the Monitoring widget will not show any information from that stage.



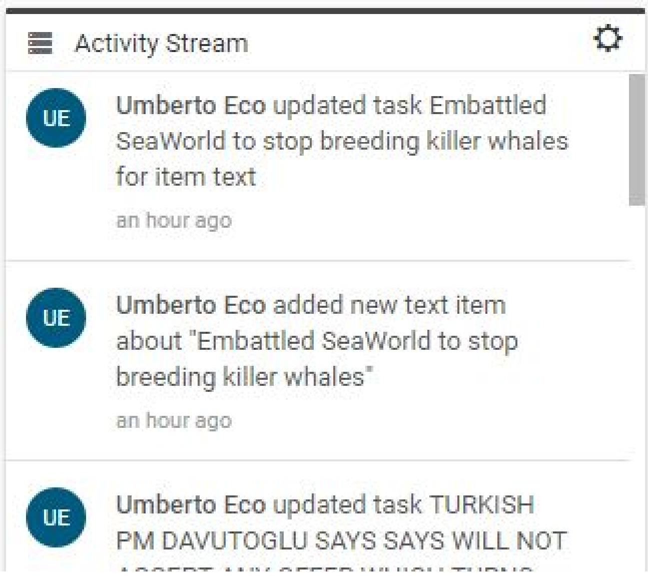
In addition to stages, Monitoring widgets can also be set up to display saved searches. Searches can be saved from the Search icon in the Workspace Panel. To select which searches you'd like displayed in your Monitoring widget, click the *Saved Searches* tab in the Monitoring Settings window. Here you will see a list of Saved Searches. To add one to your Monitoring widget, toggle the switch beside the Saved Search to the *on* position. Only searches that are marked for Global Read will show up as options here. When you are creating a Saved Search in the Search tab, and you want to use it in your Monitoring widget, make sure that you toggle the Global Read to the *on* position before you click *save*.



You can arrange stages and Saved Searches under the *Reorder Sections* tab of the Monitor settings window. Drag and drop the order of the searches and stages to arrange the order that suits your needs.

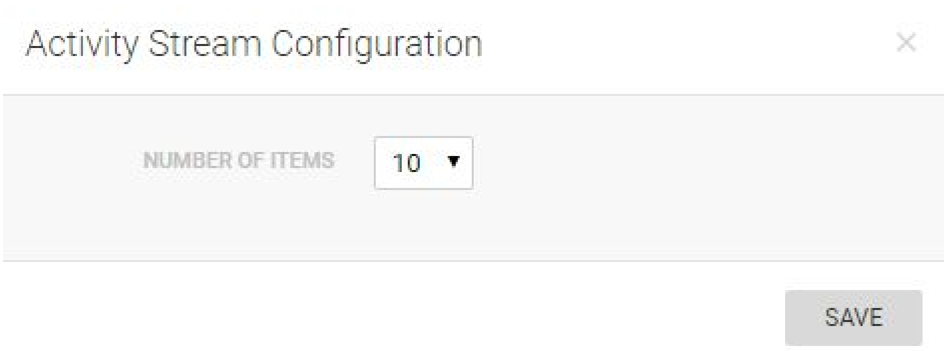


The Items Count tab in the Monitor Settings window allows you to set how many items appear in each section of the Monitoring widget. You can adjust the number of items by typing them into the text box or by clicking the up and down arrows that appear when you hover over the text box. Once you are satisfied with your Monitoring settings, click the *done* button at the bottom of the Monitoring Settings window.



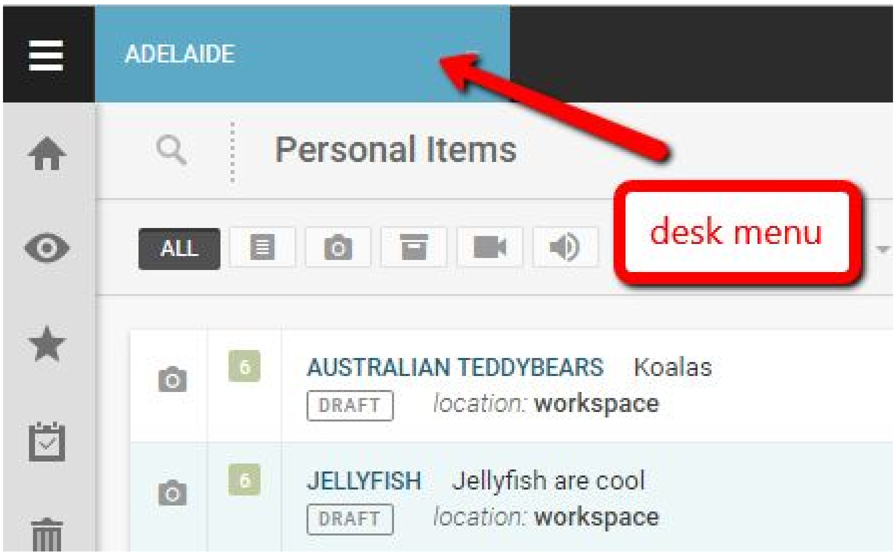
The Activity Stream widget allows you to stay up to date on progress being made on all stages, from all users across Superdesk. The displayed Activity Stream is the same, regardless of which desk the widget is on.

By clicking the gear icon in the top-right corner of the Activity Stream widget, you can adjust the number of items that appear in your widget. In the Activity Stream Configuration window, select the number of items you wish to see, then click the *Save* button.

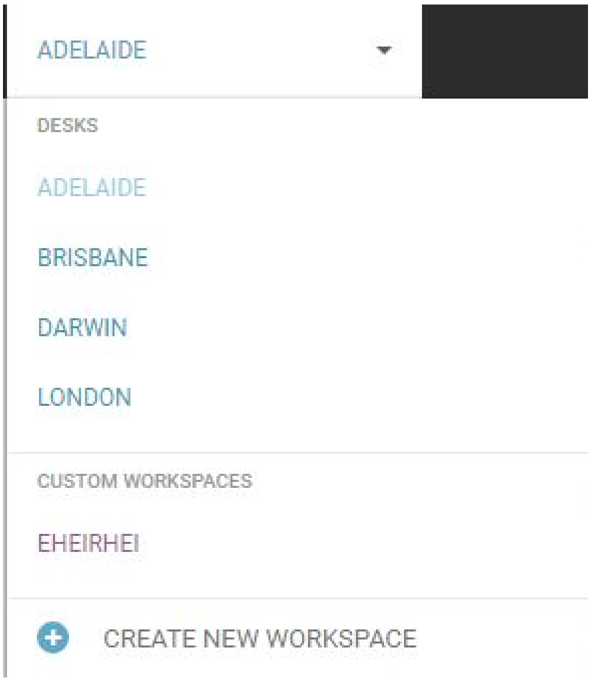


Desks

Desks are the basic organizational unit in Superdesk. All users are assigned to a topic desk. Articles that users fetch, edit, spike or publish become associated with their current topic desk. Users may be assigned to more than one topic desk at a time.



The Desk menu is beside the Settings menu in the top-left. It always displays the name of the topic desk that you're currently working on.



Clicking on the Desk menu will show a list of topic desks that you currently belong to, as well as your Personal Workspaces. Topic desks are displayed in blue and Personal Workspaces are displayed in purple. It's possible to have more than one Personal Workspace. Multiple Personal Workspaces could be especially useful if you're working on more than one project at the same time.

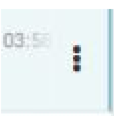
Most articles arrive at a topic desk after they have been selected by a user from the Ingest feed. The process of moving an article from Ingest to a topic desk is called fetching. It is not possible to fetch ingested articles to your Personal Workspace. You can only fetch articles to a topic desk. Once an item is fetched to a topic desk, it remains part of that topic desk permanently. Whether is it edited, published, spiked or killed, it will remain associated with that desk. It's possible that the same article could be fetched to multiple desks.

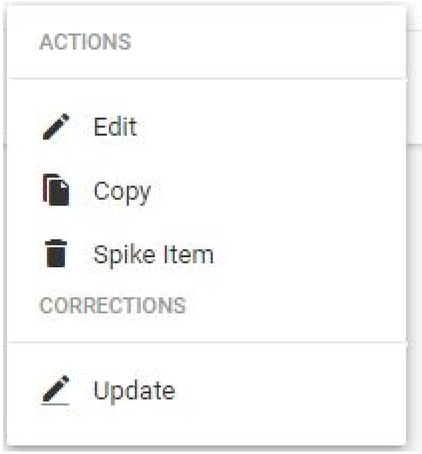
When multiple users are working together on the same topic desk, items that are opened by one user become locked from other users until they are closed. This is denoted by a red stripe that appears beside the article in the monitoring window.

Users assigned to the same topic desk will see the same widget configuration on their topic desk Dashboard. Only admins can add or change widgets in a desk workspace. Personal workspaces also have Dashboards. If a user would like custom widgets, they can set them up using their Personal Workspace Dashboard.

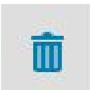
This is the Personal Items icon found on the Workspace Panel.

Even if you are on a shared topic desk, clicking on the Personal Items icon in the Workspace Panel will display articles that you have created or uploaded in your Personal Workspace. Articles that are created in your Personal Workspace are not visible to anyone but you and will not show up in Global Searches. They will not be visible to anyone else until you choose to send them to a shared topic desk.

This is an Action menu icon.



When you hover over an item that you saved in your Personal Workspace, an Action menu icon will appear on the right. Click on the Action menu to edit your article, copy it, or spike it.

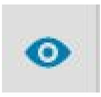


When you spike an item from your Personal Workspace, it will not show up in the spiked items section and it cannot be recovered. When you spike an article from a topic desk, it will show up in the Spiked items tab in the Workspace Panel.

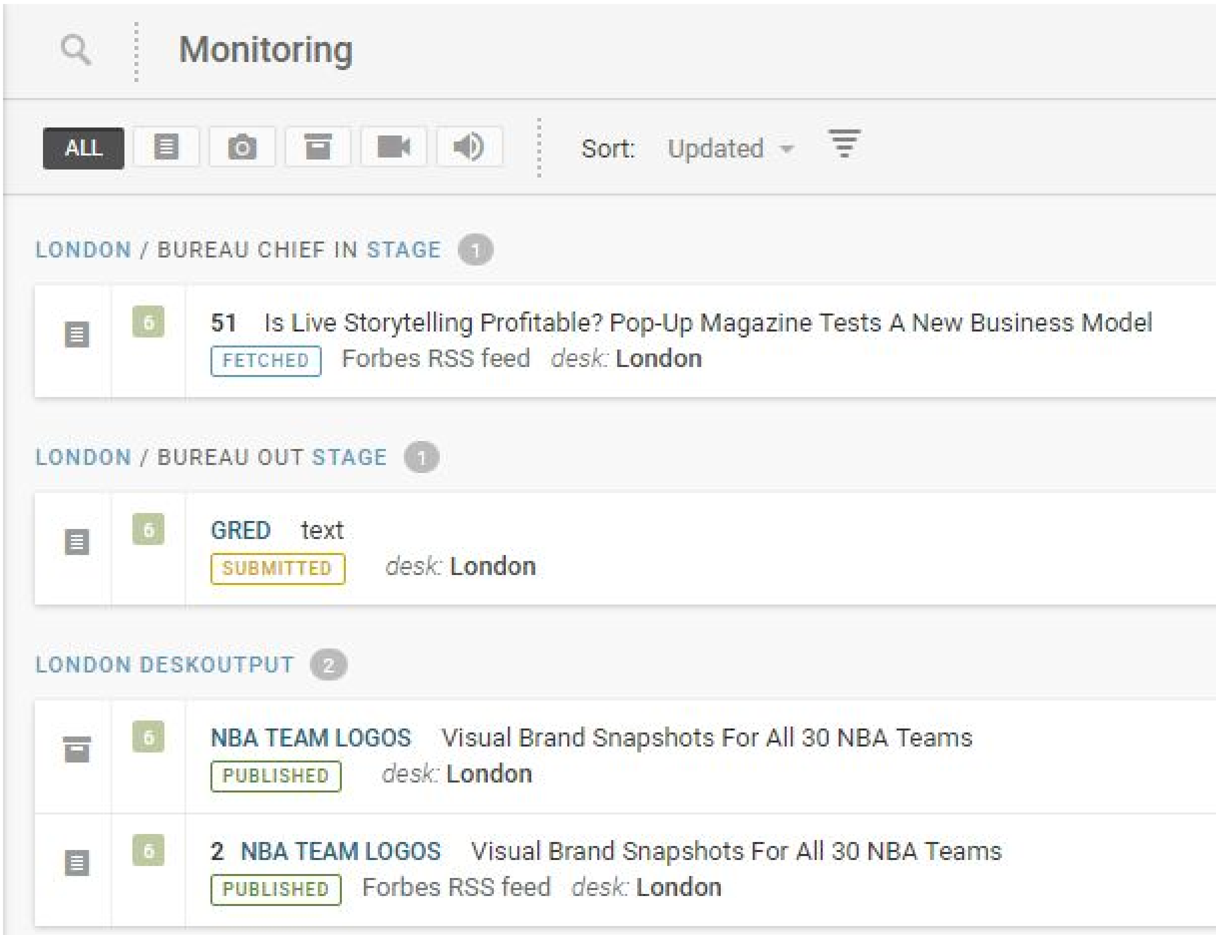
To send an article from your Personal Workspace to a shared topic desk, click Edit in the Action menu, then in the article window, click the purple *Send To* button.

When you are editing articles, if you do not click the *close* button but navigate away from the article, it will automatically minimize at the bottom of the Superdesk interface in the Workspace Bar.

Monitoring

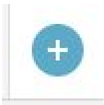


The Monitoring feature allows each topic desk to have a customized view of content. The content of the Monitoring tab is controlled from the Settings menu. Usually the Monitoring tab is set up to show you the content of the stages within your topic desk and Saved Searches that are relevant to your topic desk. You can access Monitoring for your current topic desk from the Workspace Panel by clicking on the Monitoring icon. The Monitoring tab will display the same information to every user on the same topic desk.



The Monitoring window will usually be broken up into stages. Stages are the way in which content is sorted within a topic desk. Work stages are set by the administrator in the Master Desk settings and could vary from desk to desk. Stages could be set to include an input stage, an output stage and a stage for published work, for example. Depending on how your Monitoring has been configured in the Settings menu, you might also see Saved Searches in your Monitoring window.

The Monitoring window has a search feature at the top. You can type keywords into the textbox that appears when you click on the search icon, or you can use the filter buttons located just below the search icon. The buttons allow you to filter to articles that are just text, just photos, just packages, just videos, or just sound files.

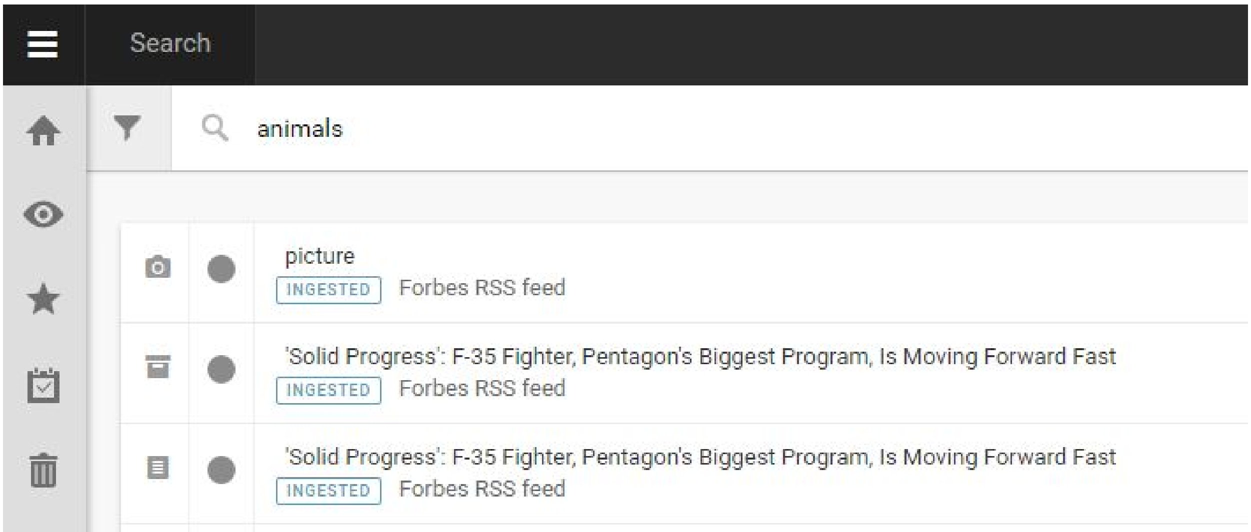

This is the Create icon.

In the top-right of the monitoring interface, you can use the create icon to make new articles, packages or to upload media from your computer into Superdesk. (See Creating New Articles in Superdesk.)

Search

Superdesk has a convenient search function for finding articles. The Search function is also how you view all the ingested articles.

Clicking the Search icon in the Workspace Panel enables you to browse articles. You can browse all types of articles using the Search feature. This includes published, killed or archived articles.



You can perform a search by typing in keywords related to the articles you're looking for beside the search icon. If you type multiple words, it will search for items containing all of them.

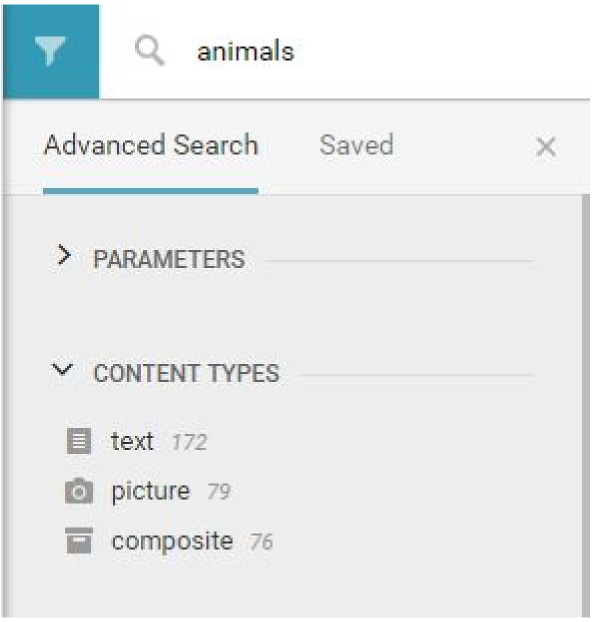
This is the Advanced Search icon.

You can apply additional filters to your search by clicking on the Advanced Search icon. Inside the Advanced Search menu, you will find several ways to refine your search:

Parameters:
- Define the stage of the article you're looking for: ingested, published, etc. or choose multiple selections.
- Slugline: Input article slugline.

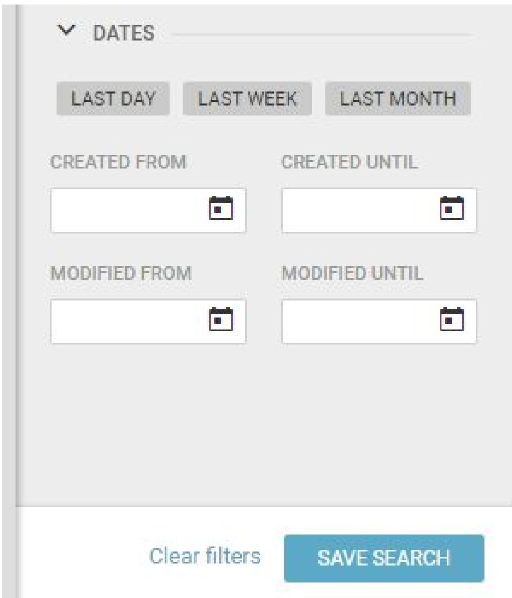
- Subject: Click the blue + button and select from a number of subjects that pop up in the Subject window (i.e. sports, politics or weather).
- Headline: Search by article title. You may enter either a full article title, consecutive or non-consecutive words.
- Story Name: Search by article uniqueID (visible at the bottom of an article's Metadata tab).
- Story text: Search for words within the article text. You may enter either consecutive or non-consecutive words. Enter three words for most accurate search.
- Byline: Search by author's full name (must be written exactly as it appears in author profile).
- Creator: Select article originator from a drop-down list.
- From desk: Select desk of origin from a drop-down list.
- To desk: Select a specific desk from the drop-down list to search for articles sent to this desk.

Once you have input information into the search parameters, click the *go* button to run the search.

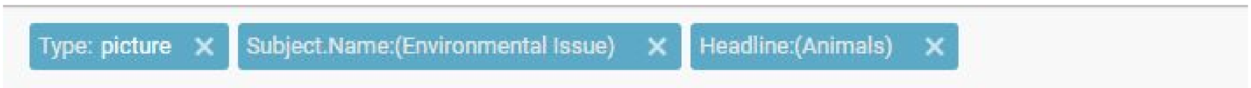


In the advanced search, filters are also available for content types. You can search for articles containing just pictures, just text, or both by clicking on *composite*.

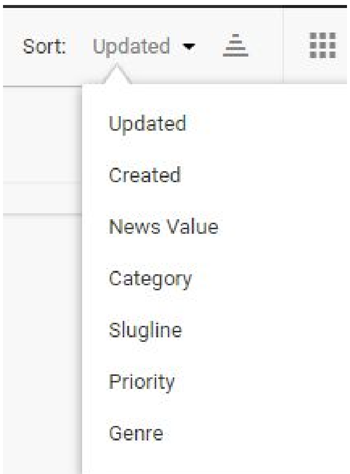
Other Advanced Search filters include: Desk, Ingest Source, News Category, Genre, News Value, Priority or items that have been flagged for legal. You can further refine your search options by checking off the boxes beside particular Desks, The final filter is by date. You can set a date range to search for articles created or modified between particular time periods by clicking on the calendar icons and inputting specific dates or by selecting the pre-made buttons for l*ast day, last week* or *last month*.



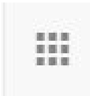
If you find yourself searching the same parameters over and over again, you can choose to save the search using the *save search* button. In addition to saving the parameters in the Advanced Search menu, it also makes the search available for use in the Monitoring widgets on your desk Dashboard.



When you have input your search information, blue boxes will appear at the top of the results window. If you're searching multiple parameters at the same time, you will see multiple blue boxes. You can get rid of a parameter and widen your search by clicking on the *x* in the blue box to remove the filter.

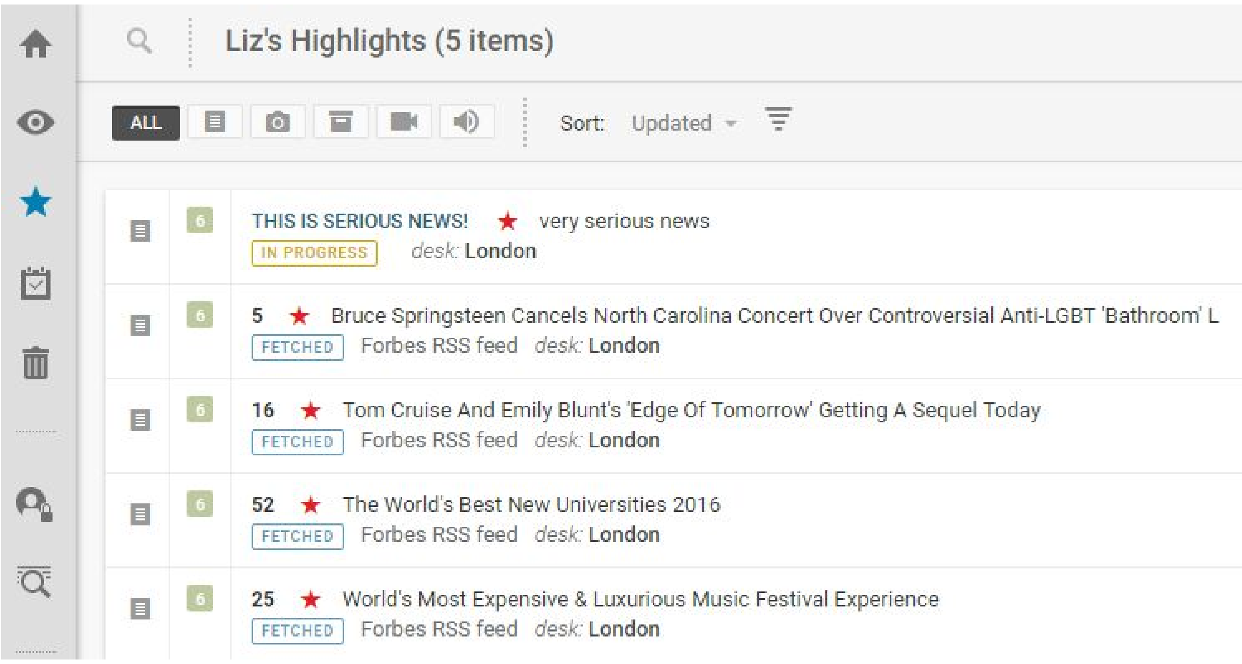


In the top-right section of the search results window, you have the option to rearrange your search results. The drop-down sort menu allows you to arrange by most recent, date created, news value, category, alphabetically by slugline, priority, or alphabetically by genre. Clicking on the reverse pyramid beside the sorting options will allow you to view your results in reverse order.

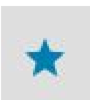


By default, the search results appear in a line by line view. You can switch to a grid view by clicking on the grid icon in the top-right corner. The grid view is especially useful for viewing picture articles because it allows for thumbnail views of the pictures.

Highlights



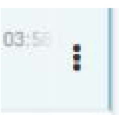
A Highlight List is a curated selection of articles that can be shared with all Superdesk users. Highlights Lists are configurable digests or summaries of the most important content. If you are unable to add articles to a Highlight List, or create a new one, check with your Superdesk admin to verify your account has the correct privileges. New Highlight Lists can only be created in the Settings menu.



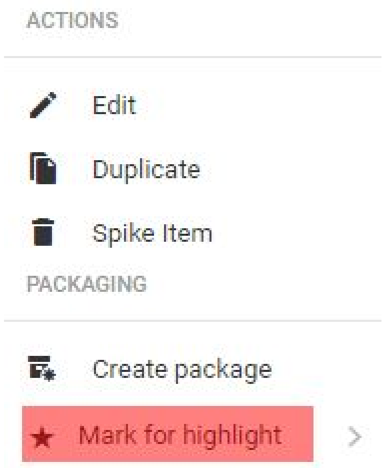
You can view the Highlights by clicking the star icon in the Workspace Panel.

You can create several Highlight Lists at a time to deliver relevant content organized by priority, topic or interest. Articles can be added to Highlights lists from various stages such as published articles, rough drafts, or simply items that have been recently fetched to a desk. Ingested articles must be first fetched to a desk before they can be included in a Highlight List.

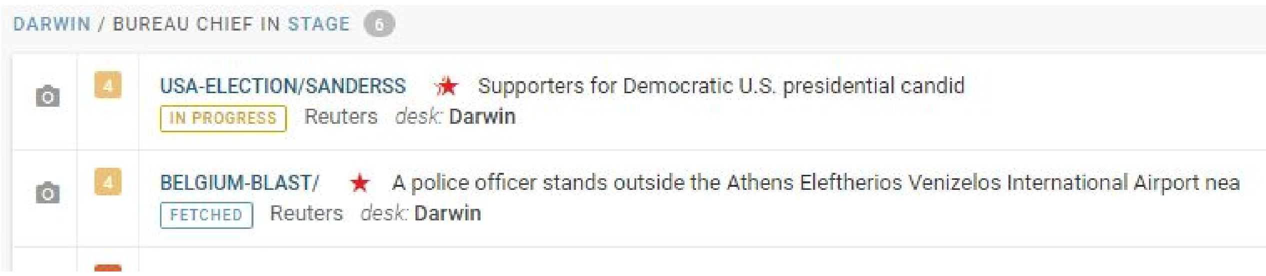
To add an article to a Highlight List, find the article that you wish to add in either the Monitoring, Search or Content sections of the Workspace Panel.

 This is the Action Menu.

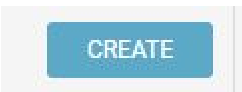
When you hover over the articles, the Action menu will appear.



When you find an article you'd like to add to a Highlight list, hover over the article to display the Action Menu on the right. Once open, hover over *Mark for highlight* and choose the Highlight List you'd like the article added to. New Highlight Lists can be created by users with the correct permissions in the Settings menu.



A single article can be part of multiple Highlight Lists. A red star will appear beside the article title to let you know that it has been added to a list. If the article appears in more than one Highlight List, you will see a doubled star beside the article title.



When you are viewing the Highlight lists there is a blue CREATE button in the top-right corner of the Highlights window. Clicking on this will open a new tab that allows you to create a package from articles in the Highlights list.

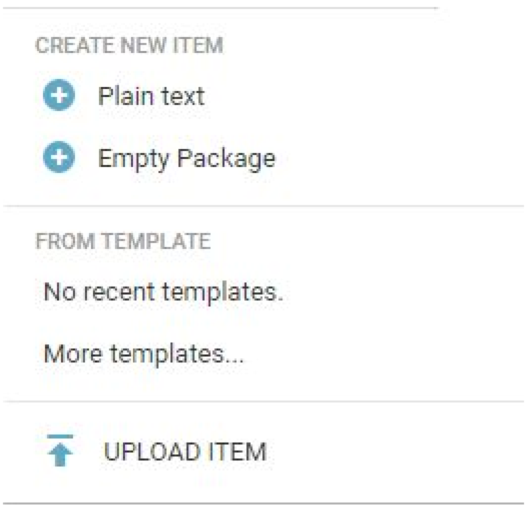
Once you have created and named your package, select articles from the Highlight list by clicking on the checkboxes in the left column, then click the *Add to Current Package* icon in the top of the article list window.

Creating new articles

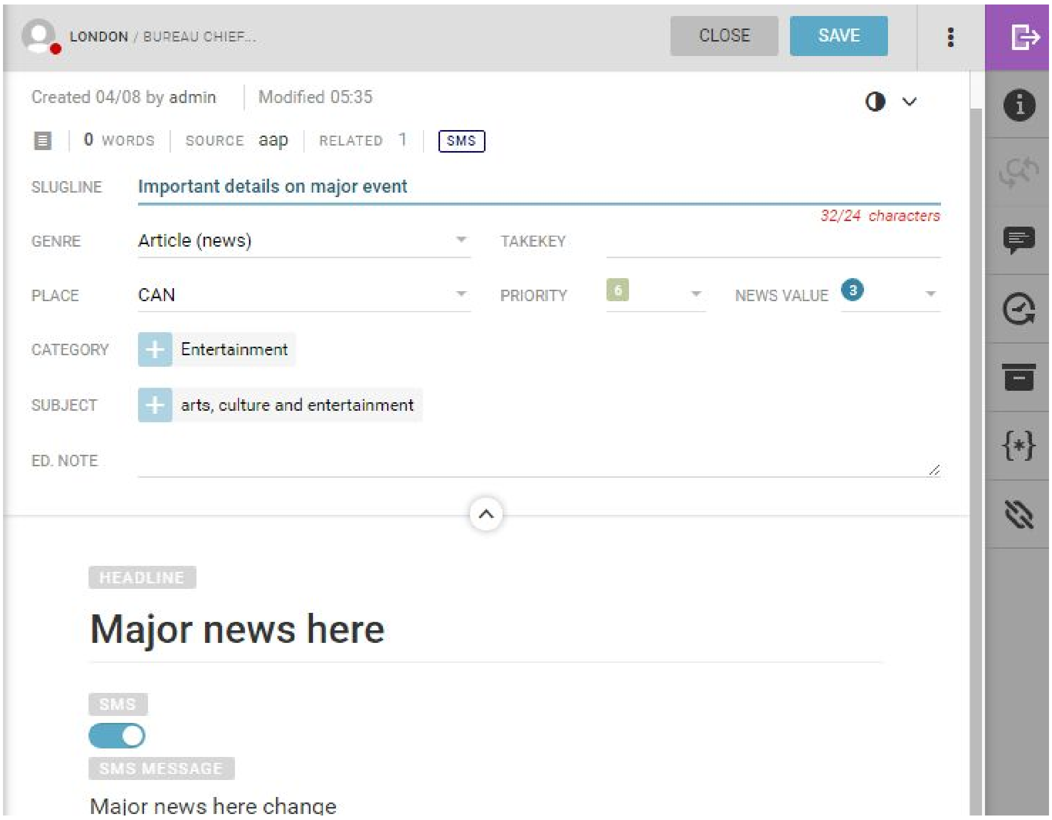
 This is the Create icon.

On your Dashboard this button allows you to add widgets. On all other tabs it allows you to make new text articles, new packages or upload audio, pictures, and video from your computer into Superdesk. (Video uploads are currently under revision so may not display correctly.) On the Dashboard tab, the Create icon only allows you to add widgets.

To start writing a new article, click the Create icon from any tab other than the Dashboard.

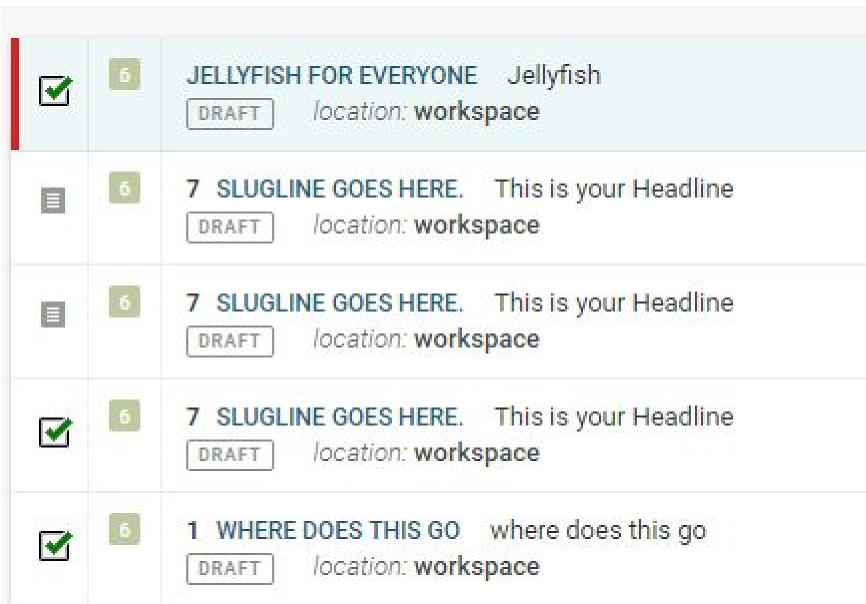


A plain text item can only contain text. A package is a group of articles and media. From the Create menu, you also have the option of uploading media from your computer into Superdesk.



When you have chosen to create a new plain text item, you will see a blank content item window with text boxes for Slugline, Genre, Place, Headline and the text body.

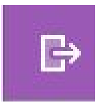
Creating Packages



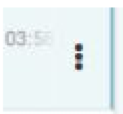
When you create a new package, you can enter metadata and a headline but the package will remain empty until you add content items to it. To do this, select content items to put into your package. From the Monitoring tab or the Search tab, hover over the icons to the left of each article to turn them into checkboxes. To add articles to the package that you have open, select articles by clicking the checkboxes. Then you can choose the *Add to Current Package* button in the top-right corner of the Monitoring or Search window.

You can also choose to create a new package with selected content items using the *Create Package* button to the the left of the *Add to Current Package* button. Clicking on the *Create Package* button will open a window with the selected articles already attached. You can then enter the metadata for your package. Note that you cannot create packages in the Personal Workspace.

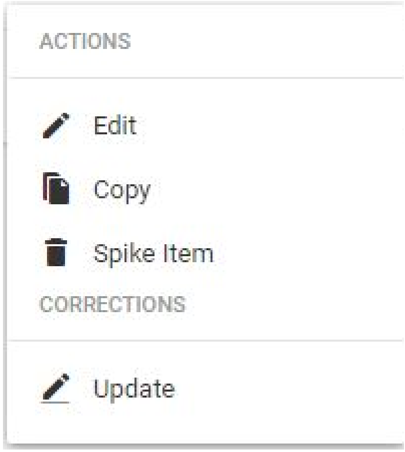
See the Packaging section for more ways to create packages.

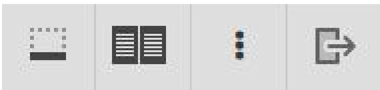
This is the *Send To* button.

If you created an article in your Personal Workspace, when you are satisfied with your article, you can choose to send it to a desk to be reviewed by others, or send it to the publishing queue by clicking the *Send To* button in the top-right corner. If you created the article on a shared desk, it will automatically be visible to others. You can send it to the publishing queue using the *Send To* button. If you are not ready to send it to publishing or to a desk, you can click *Save, then Close* to revisit the article at a later time.

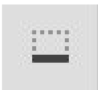
 This is an Action menu.

When you wish to continue writing your article, hover over it, click the Action menu and then select *Edit*.



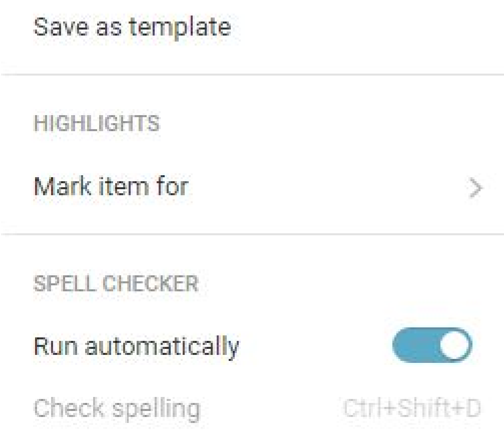


Along the top of the editing window, you will find several tools.



The first button allows you to minimize your current article. A shortcut to the article will appear at the bottom of the Superdesk interface in the Workspace Bar.

The second option is a Multi-edit button which allows you to have more than one article open side by side. Selecting the Multi-edit option will make the article available to be viewed in the Multi-edit mode. Multi-edit mode can also be accessed from the Monitoring tab by selecting multiple articles using the checkboxes and then clicking the Multi-edit button in the top-right corner.



The third icon is an Action menu. Selecting it opens a pop-up window with options to save the formatting as a template and run a spell check.

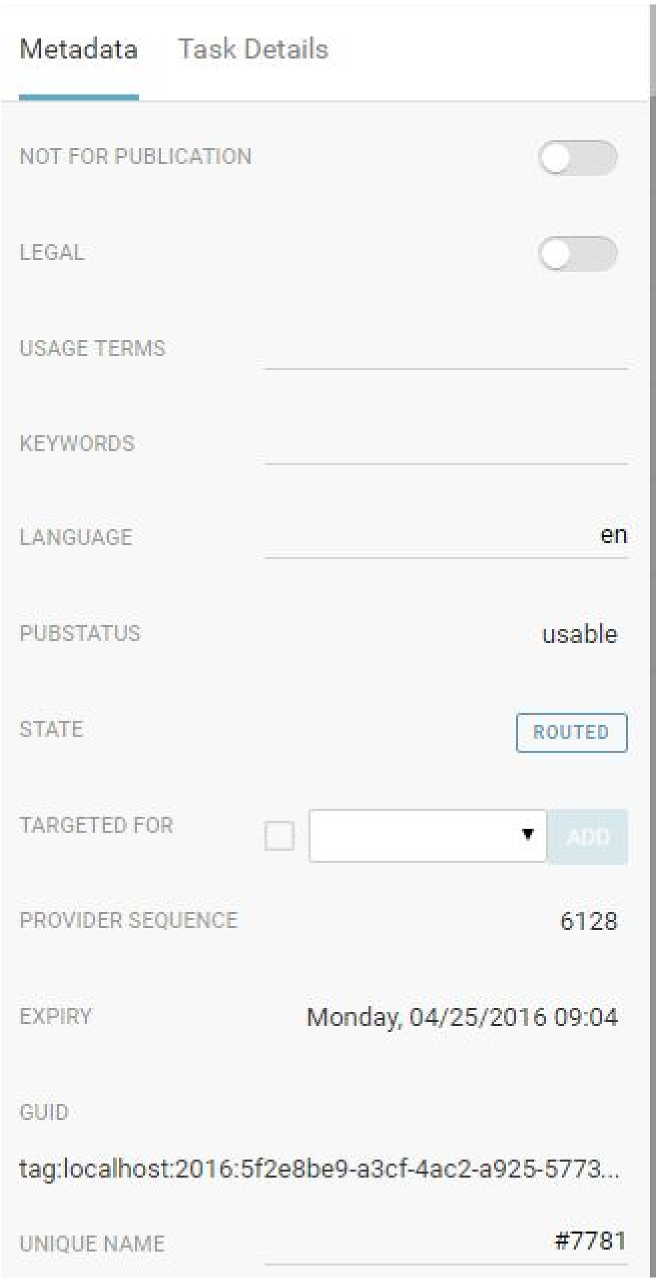
 This is the *Send to* button.

The fourth icon is the *Send to* button. It allows you to send your article to a particular topic desk and work stage or to publish it, depending on your user permissions.

 This is the Editing Info toolbar.

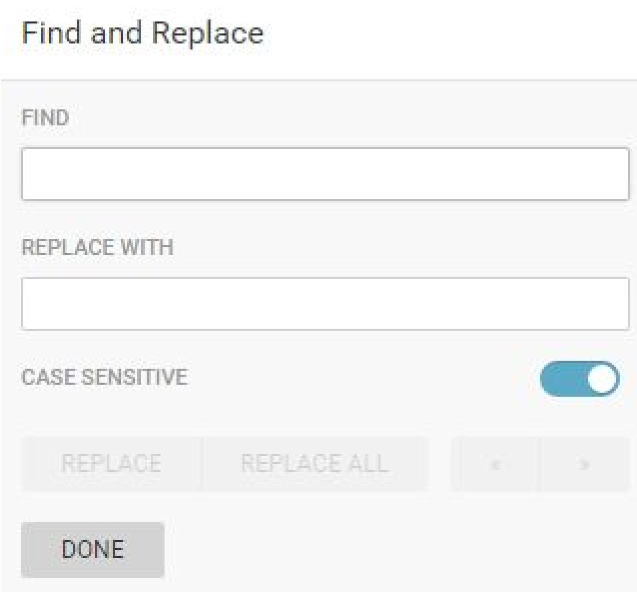
Below the *Send to* button you'll find the Editing Info toolbar. The first button below the *Send to* button is the Info button. The *Info* button (highlighted in blue above) allows you to add metadata to your article. Options include marking for legal, publishing permission, and keywords. The last option in the window is where you can change the default UNIQUE

NAME for the article to make it easier to search. Otherwise, the article is automatically assigned a unique number ID in this field.

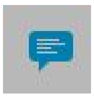


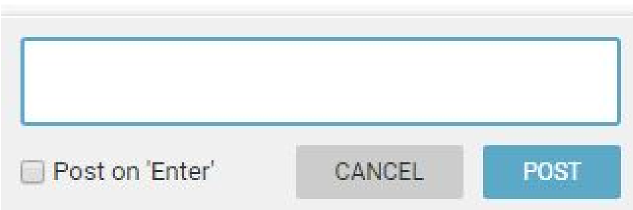
The *Not for Publication* toggle does not actually stop a user from publishing the article but rather marks it with a tag denoting its status.

 Find and Replace

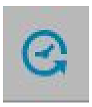


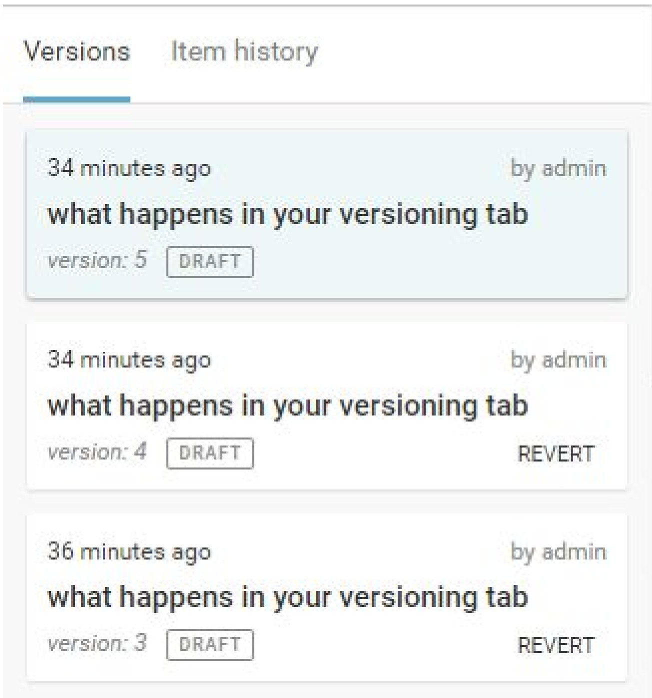
The Find and Replace feature allows you to locate and update specific words and phrases. Type the word you wish to adjust in the *FIND* text box, then type your new word in the *REPLACE WITH* textbox. The *REPLACE ALL* button will replace every instance of the word with what you put in the *REPLACE WITH* textbox. You can also replace them one at a time with the *REPLACE* button, instead of *REPLACE ALL*.

 Comments

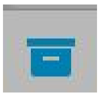


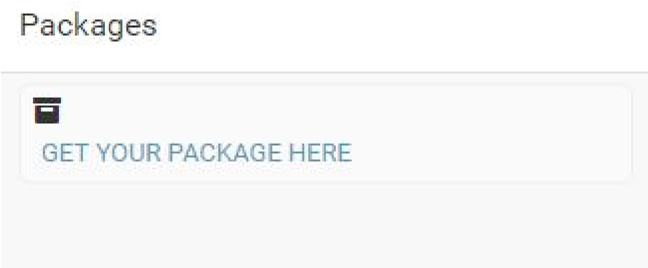
The *Comments* button allows users who are collaborating on the article to have discussions about the content. The comments will remain associated with an article even if it is sent to another topic desk or published. To add comments, type them in the text box, then click the blue *Post* button. Comments cannot be deleted.

 Versioning

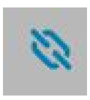


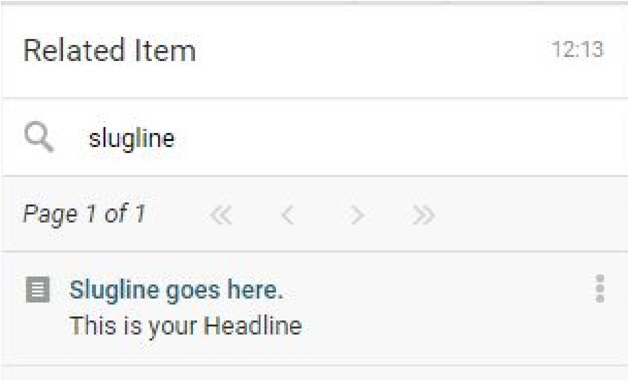
If you are writing and editing your article over multiple sessions, every time you save your article, Superdesk will retain a copy. You can access previous versions in your versioning tab. Clicking *REVERT* lets you continue writing from a previous version, while still preserving all the other versions as well.

 Packages



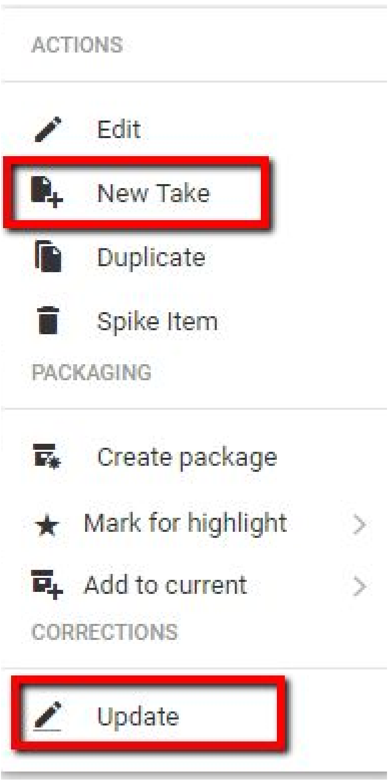
When you select an article to edit, the packages tab will tell you if the article you selected belongs to a package and what the name of that package is.

 Related Items



The *Related Items* tab allows you to see items that share the same title or keywords by typing info into the search bar, in the related items tabs. Note: This tab only displays while you edit plain text items, not packages.

Once created or fetched, articles can be edited. To edit an article, hover over the article, click on the Action menu and choose the E*dit* option.



Options other than editing include making Takes and doing Updates. (Highlighted in red above). A Take is useful for a story that is being written in several pieces. A user may write the first part of a story, then send it off to publishing. Clicking on the New Take option in the Action menu creates a new article with all the same sluglines, headline and metadata but where the body is empty.

The Take also receives a takekey number so that you can find your articles in sequence. A takekey is a numerical identifier for articles that are split into more that one part. The takekey number will be visible underneath the slugline. (Highlighted in red above.)

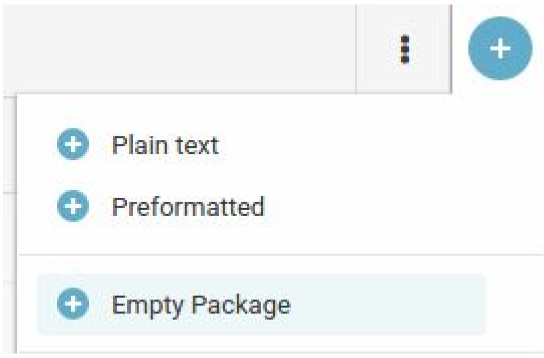
An update is meant to replace a previous version of an article. When you choose *Update* from the Action menu, a new article is created with the same metadata, bylines, dateline, headline, abstract, priority, urgency, place, subject and category. The takekey will become “update”. Note that you cannot perform updates on published articles, picture items or packages.

Packages

A package is a container consisting of various news items, typically plain text items and image(s). Packages have their own metadata. There are several way to create a package.

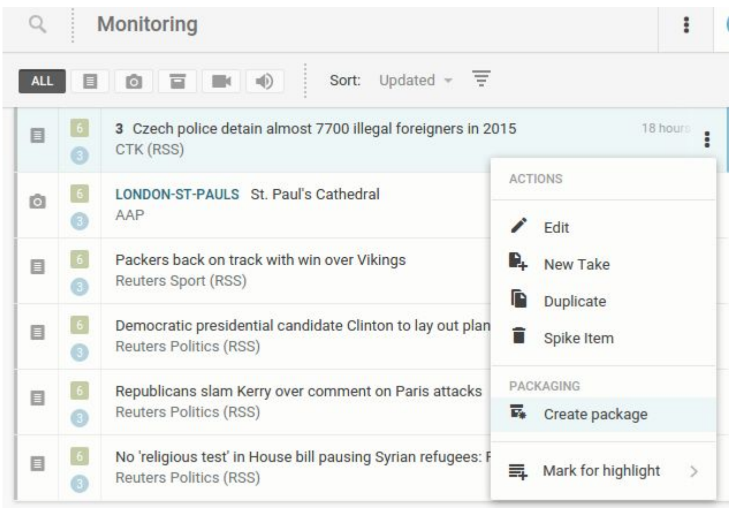
Creating an empty package

Users can create a package from scratch by clicking on the icon and selecting "*Empty package*" from the dropdown menu.



Creating a package from a single item

In the Monitoring view, users can choose a news item to start creating a new package by clicking on the item's Action menu icon. From the menu that pops up, you can select Create Package. This will create a package containing the original news item and the item's headline is copied to the package headline.

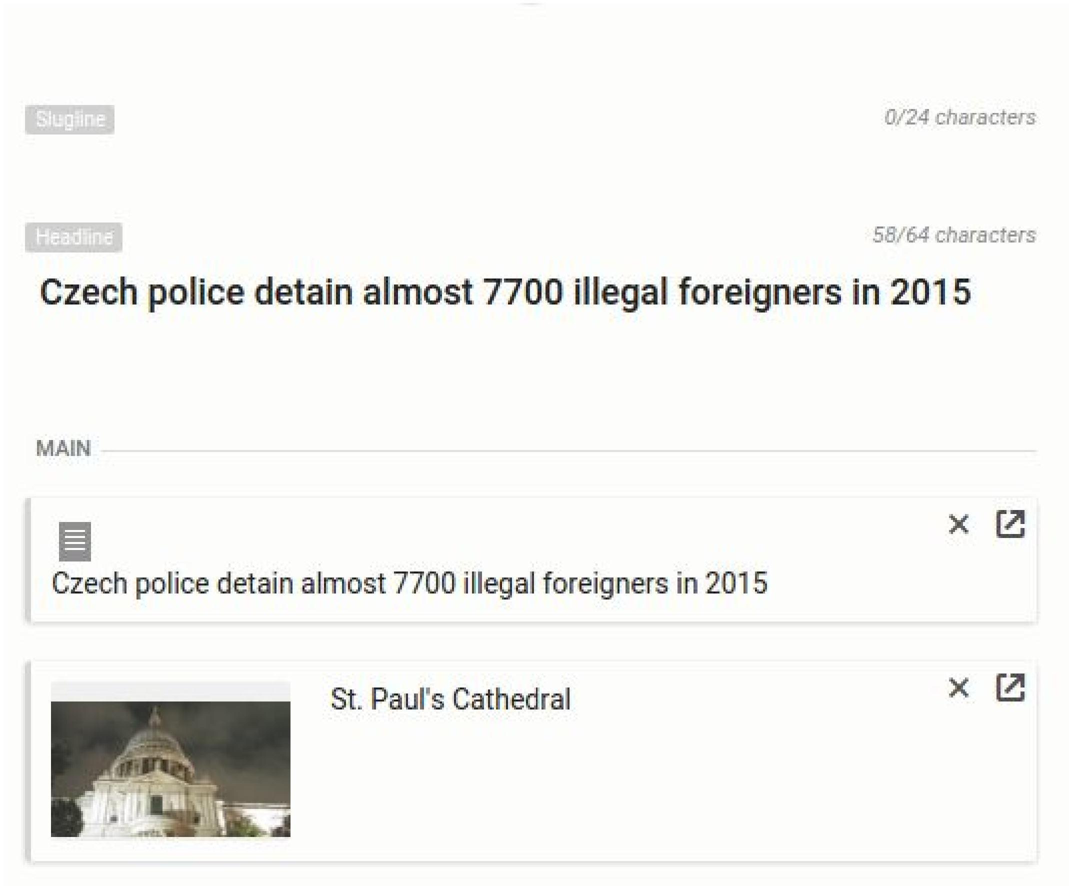


You can also click the Create Package icon  which appears once you select the checkbox beside an item (see Creating a package from multiple items).

Creating a package from multiple items

In the Monitoring view users can select multiple items by hovering over the item's icon on the left side, which turns into a check box. Check off the boxes of the desired items and click on the Create Package icon in the top-right corner of the Monitoring window to create a package with these items in it.

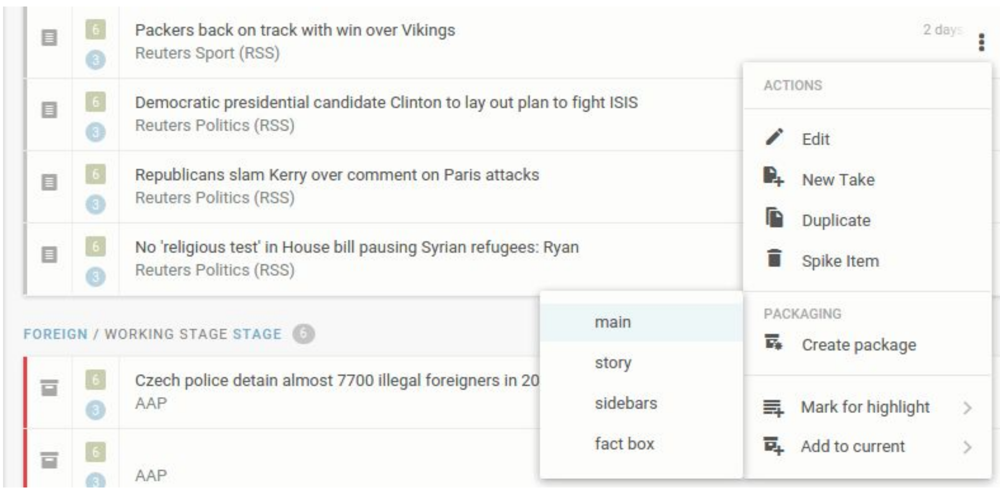
A new package is then created with empty metadata but a copy of the headline from a text item in the package.



Adding items to an existing package

While working on the package (i.e. having it open) users can add more items to it.

A single item can be added by clicking on the item's Action menu and selecting Add to current and then selecting whether it should be featured as main, story, sidebars or fact box.



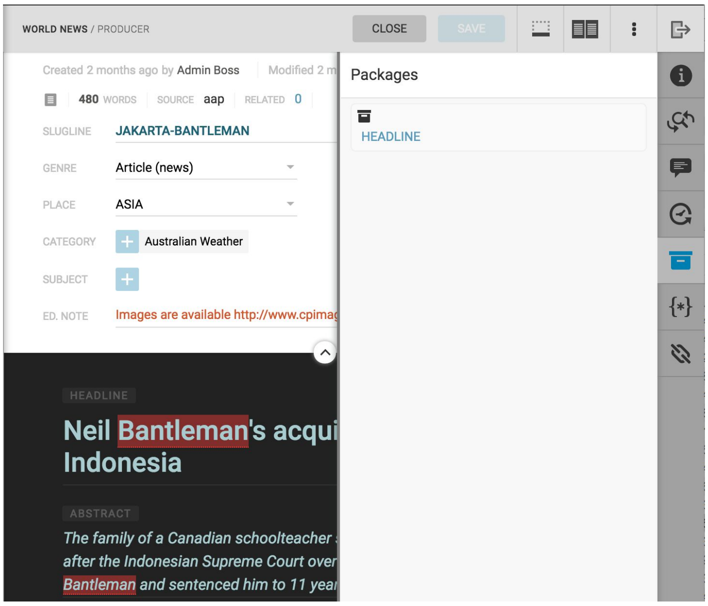
Adding multiple items to a package

Multiple items can be added to a package by selecting their checkboxes and clicking on the Add to Current Package icon in the top-right corner.

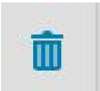
Note: The only scenario in which an item cannot be added to a package is if it is killed.

Packages Tab

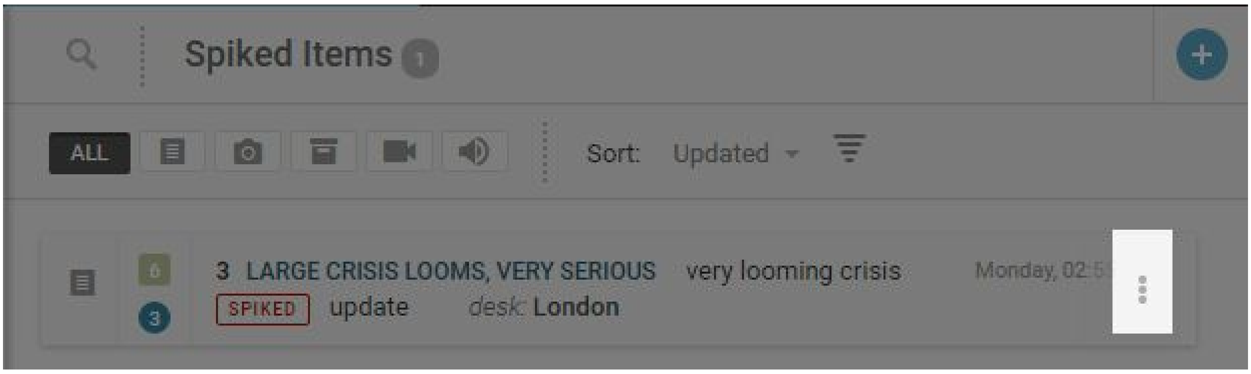
When an article is open in editing mode, selecting the Packages tab will display whether the article belongs to a package and what the name of that package is.

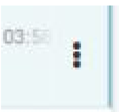


Spiked Items

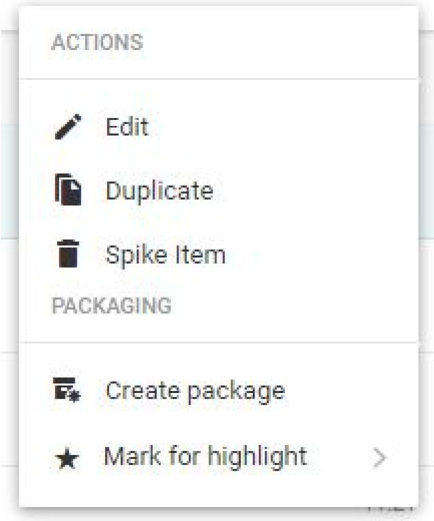


Spiked items are articles that have been removed from the topic desk workflow. Spiked items from your topic desk can be viewed by clicking on the Spike icon in the Workspace Panel. Items can be spiked from the Monitoring Window or from your Personal Workspace. Note that when articles from your Personal Workspace are spiked, they are permanently deleted. Articles spiked from your Personal Workspace will never be shown in the Workspace Spike tab.



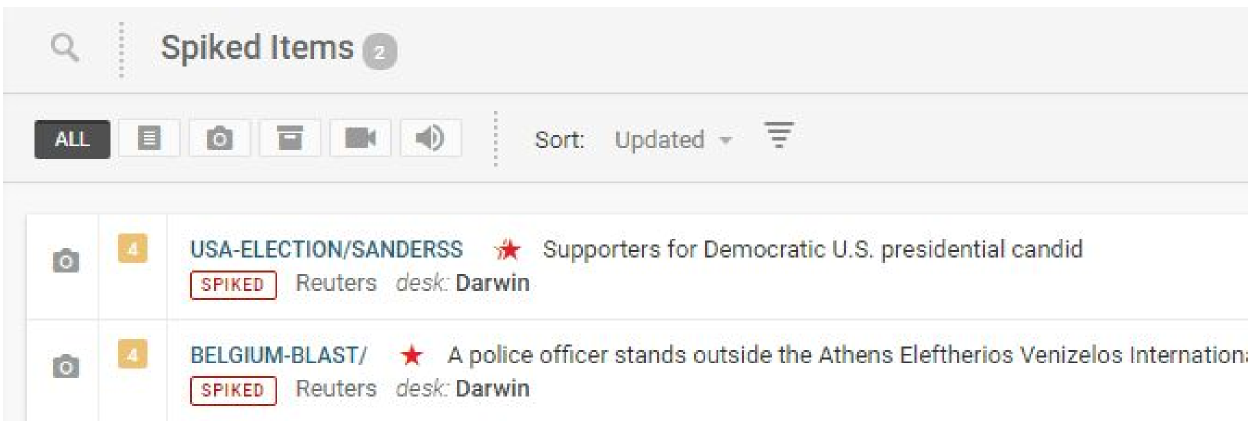
 This is the Action menu.

To spike an item, hover over the item and click the Action menu that appears to the right side of the article entry.

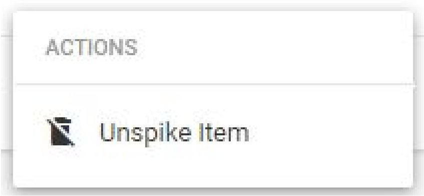


From the Action menu, select the *Spike Item* option. Items can be spiked from any stage. Note that published items cannot be spiked and must be killed instead. Killing an item sends out notifications to all the content subscribers of the published article notifying them that the article has been rescinded.

It is not possible to spike an item that is part of a package. You must first remove the item from the package before you can spike it.



You can search through the spiked items using the article type filter buttons or by clicking on the search icon and typing into the textbox. Spiked items are desk-specific so you will only see items that have been spiked from your current topic desk.



Spiking items from a topic desk is not permanent. If you find an article that you wish to unspike, hover over the article in the Spiked items section. The Action menu will appear. From there, you can choose the *Unspike Item* option. This will return the article to the stage from which it was spiked.

Example Journalist Workflow

As a reporter, you'll likely spend most of your time creating and revising content within topic desks or your Personal Workspace(s), monitoring and searching content for research purposes. Once an admin creates an account for you in Superdesk, you will receive an email with login instructions.

If you haven't already done so, it would be useful to familiarize yourself with the following chapters:

- Superdesk Overview
- Using Dashboards & Widgets
- Monitoring
- Superdesk Terminology Guide

By default you land on the Dashboard, an information overview of a Desk or topic area. When you click on *Select Workspace* (the Desk menu) in the upper-left corner, a drop-down list of topic desks you've been assigned to should appear. If you don't see any topic desks, contact your administrator to set them up.

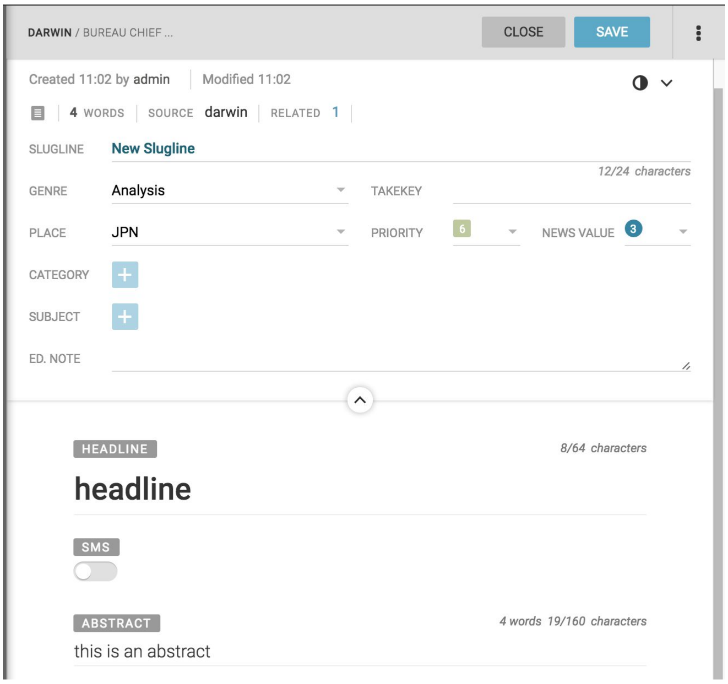
The dashboards for each topic desk will display widgets configured by your editor/admin. You can customize the widgets on your Personal Workspace.

The Monitoring View  is a space where journalists or production staff can keep up-to-date on content work stages, create new articles and send content to another stage.

Content Workflow

To create a new article, first make sure you're in the topic desk it should be filed to or your Personal Workspace if it's not intended to be shared. Click the *Monitoring* icon (second icon on the Workspace Panel) to enter the *Monitoring* workspace. Click the + icon located in the upper-right corner of the dashboard. A menu will appear prompting you to select whether you want to create a plain text item, an empty package, to use an existing template or to upload an existing item from your computer into Superdesk.

To create an article, select either plain text item or the template you'd like to create from. Once you make any changes to it, you can hit the *save* button in the top-right corner to save it as a draft. It will automatically save to your current topic desk or Personal Workspace. You can keep an article open but minimize it by clicking the *minimize* icon located beside the *save* button. 



Note: If you don't close the article, it will lock, preventing other users from updating it (though senior staff can override this). All your open items remain visible in the Workspace bar located at the bottom of the dashboard. If a user session hasn't been updated in four hours, the session is lost and the lock is dropped.

As you work, changes are autosaved both on the server and locally. If you lose internet connection, you can restore your work once a connection to the server is re-established, though there may be some issues if the file has been modified during the disconnection. While you edit an item, it is locked from any other users making changes to it.

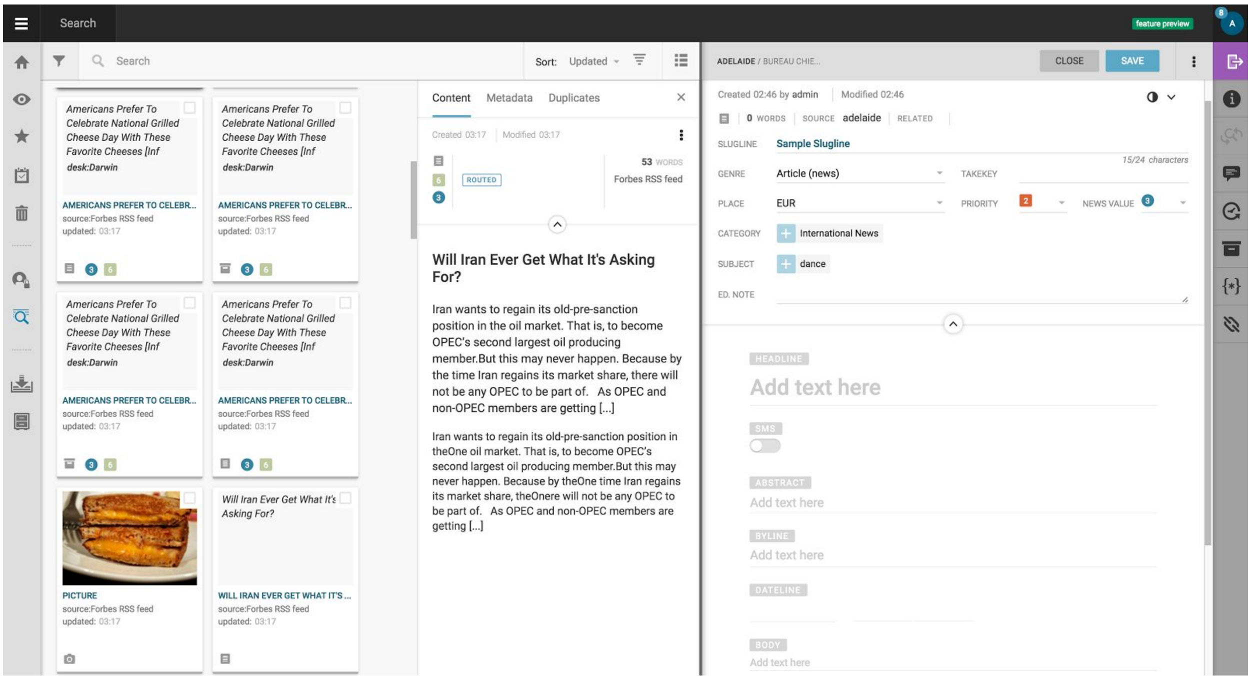
Users can collaborate by creating and updating content for the same topic desks and by Packaging. Packaging enables users to work on different pieces of content at the same time, which can be transmitted as bundled content to subscribers. (See the "Bundling Images and Text Items Together" section below).

Research & Multi-Window Workflow

The Search feature allows users to navigate through multimedia from any repository Superdesk is aware of various news agency feeds, RSS, emails and other sources. These sources are set up by the Superdesk administrator. If you cannot find items from a desired source, notify your admin.

Superdesk's multi-window workflow enables users to have a Monitoring or Search window for research open at the same time as an article entry. This makes it convenient to work on an article and easily switch context to look up information in an archive, for example. Users can also have multiple article entry windows open simultaneously. See "Superdesk -

Search" for more information on using the Search feature and "Superdesk - Creating New Items" for detailed information on content creation.



Monitoring Issues & Saved Searches

If you are interested in monitoring RSS content coming in and being produced about a particular issue, you can set up a Monitoring widget in your Monitoring workspace with a customized search. To do this, first click the *Search* icon on the Workspace Panel and set the parameters for your Advanced Search. When you input your desired Search parameters, a blue button reading *Save Search* appears at the bottom of the screen. You should now see the saved search by clicking on the Saved tab of the Advanced Search panel. Note: If your search does not return any content, you can still save the search and be alerted when new content corresponding to the search comes into the system.

To set up a widget monitoring a saved search, click the *Home* icon on the Workspace Panel and then click the blue *Create* button in the top-right corner. Select *Monitoring Widget*, then *Add this Widget*, then click *Done*. To adjust the Monitoring widget settings, click the gear in the top-right corner of the widget. Select the *Saved Searches* tab and select from the list of Global Saved Searches. Click the button beside a Saved Search to turn it on (blue means on, grey means off). You can arrange the order you'd like multiple searches and topic desks stages listed in the widget by clicking the Reorder Sections tab and dragging and dropping them into place. You can also adjust the number of items you'd like to display for each section of the Monitoring widget.

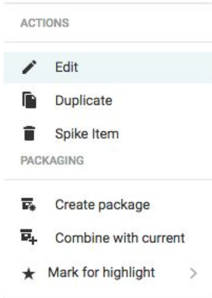
Updating Content

To resume working on an article after it's been closed, journalists can find any content they need to update from the output view of their topic desk. From the Monitoring View, users can also use the Quick Search Filter from the Monitoring View  (click the icon at the top-left corner of the Monitoring window). This can save journalists a lot of time when tracking down content as it can quickly filter through thousands of items in a saved search, for example, to see all items with mentions of the search term(s).

Once the desired article comes up in a list, hover over it, and depending on your view you will either see:

a pencil icon you can click on to edit the item

or an Action Menu you can click on to select *Edit*.



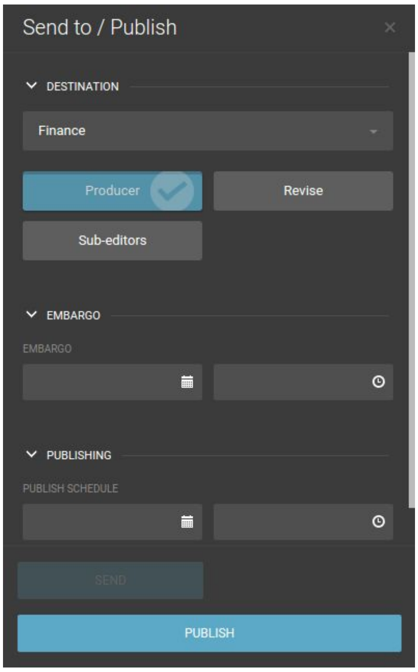
Bundling Images and Text Items Together

To pair images with articles, create a package and add the plain text items and image(s) to it. There are several ways to create packages. See "Superdesk Packaging" for detailed instructions. Note: In order to add an item to a package, it will have to exist within one of your assigned topic desks. If it doesn't, you can fetch the item by finding it via Search, then selecting the checkbox in the top-right corner of the item and clicking the *Fetch to* icon.

 Selecting the Fetch to icon opens a window where you can select the topic desk and stage you would like to send it to. Note: If you select *Fetch* instead of *Fetch to*, the item will automatically be sent to the last topic desk you were on.

Sending Drafts 

If you created an article in your Personal Workspace, when you are satisfied with your article, you can choose to send it to a topic desk to be reviewed by others, or send it to the publishing queue by clicking the *send to* button in the top-right corner of the workspace. If you created the article on a shared desk, it will automatically be visible to others. You can send it to the publishing queue using the *send to* button. If you are not ready to send it to publishing or to a desk, you can click *save, then close* to revisit the article at a later time.



When you are ready to move a content item into another stage of the content workflow, click the *send to* button on the right-hand corner of the workspace window. A pop-up menu then appears with options to select the destination topic desk and work stage (i.e. Bureau chief in, Bureau out, etc.) you'd like to submit to. Stages are set up by your admin and are used to organize items within a topic desk. You can also set an Embargo notice on the item until a certain date and time as well as a publishing schedule. Note that an Embargo does not prevent an article from being published. If it is published, it will still carry the Embargo notice forbidding it from publication until the set time. At the bottom of the window are blue buttons with options to *send*, *send and continue* (which keeps the item open for continued editing), and *publish*.

The news item (or package) can be sent to a different stage of the desk (for sub-editing for example) or to another desk. It can also be published. Publishing can be scheduled to later time and published items can be updated or killed.

If new information has come in regarding an article, an Update can be created to replace its previous version. When you choose *Update* from the Action menu, a new article is created with the same metadata, bylines, dateline, headline, abstract, priority, urgency, place, subject and category. The takekey will become "update". Note that you cannot perform updates on published articles, picture items or packages.

Kills are used to stop clients from using content you sent them (they are required to remove the content once you do this). This is especially useful for court stories that suddenly issue a non publication order after a journalist has been reporting throughout the day.

Spiking 

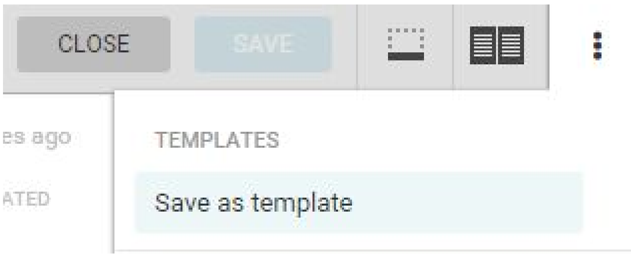
Spiking an item means marking it for removal (without actually deleting the information, in case it needs to be resurfaced). To view all spiked items, click on the Spiked Items icon on the Workspace Panel. To Spike an item, click on the Action menu and select *Spike Item*. Note that published items cannot be Spiked. To remove them, they must be Killed.

Other Useful Features & Tools

Templates

A time-saving feature for journalists, Templates enable users to save any article into a template (a complete copy with all metadata) by clicking on the Action menu and selecting *Save as template*. A new window then opens up prompting users to name the template and to select its type (from Create and Highlights) and assign it to a topic desk (select the Desk Template checkbox and then a drop-down list of topic desks appears).

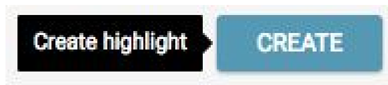
Creation templates create content with a specific profile. If you're a court reporter, for example, you might have a general news template and a court template, which would save you from having to enter repetitive metadata. Highlights templates configure elements like Headline, Byline, Abstract, etc. from multiple articles to be displayed as flat/digest files.



Multiedit 

The *Multiedit* button allows you to toggle between multiple open content items, as well as to display two plain text items side by side in editing mode.

Highlights 



The highlight icon located on the Workspace Panel allows you to view all the items you have highlighted. You can also send out digests with a list of all the items in a highlight so that subscribers can go through the wire to find the original files. To create a new Highlights list, go to settings from the Settings menu in the top-left corner. There you can select the Highlights tab and hit *create configuration* to create a new Highlights list.

To highlight an item, click on the Action menu for a particular item and select *Mark item for* and then select the Highlights list you would like to add the item to.

Versioning 

While an item is open for editing, you can click the *versioning* icon located on the Content Toolbar on the right-hand side of the screen to display and revert back to previous versions of a content item.

Personal Workspaces and Personal Items

Personal Workspaces are customizable workspaces accessible from the Desk menu. Here you can create new workspaces with widget setups customized for your own workflow. Only you can access your Personal Workspaces.

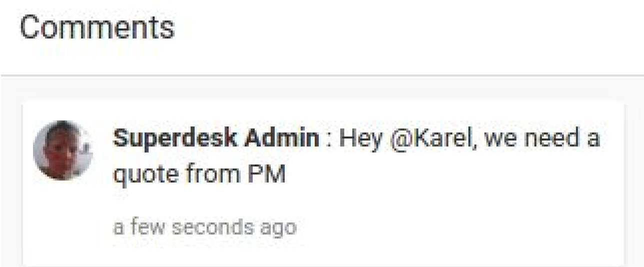
Personal Items is an icon located on the Workspace Panel. 
This displays all the Personal Items you have created. Only you can view or edit your Personal Items. To create a new Personal Item, click the + icon in the top-right corner of the Personal Items window.

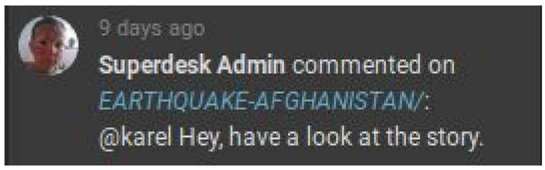
User Profile Settings

To view and adjust any of your profile settings, click on the blue circle with your initials in it located in the upper-right corner of the Superdesk interface. When you select *profile*, an Overview of your profile information is displayed. You can also set your preferences, view your privileges and and view your activity stream. User privileges are set by administrators.

Comments 

Users can add Comments to each content item with Twitter-like @mentions. This is useful for alerting other topic desks or users to the content in a hurry. To add a comment, click on the comment icon on the Editing Info Toolbar (located to the right of an open article entry). Whenever a user is mentioned, he or she gets notified within the system and can also receive an email with a direct internet link to the item. Note: this email notification can be turned off.



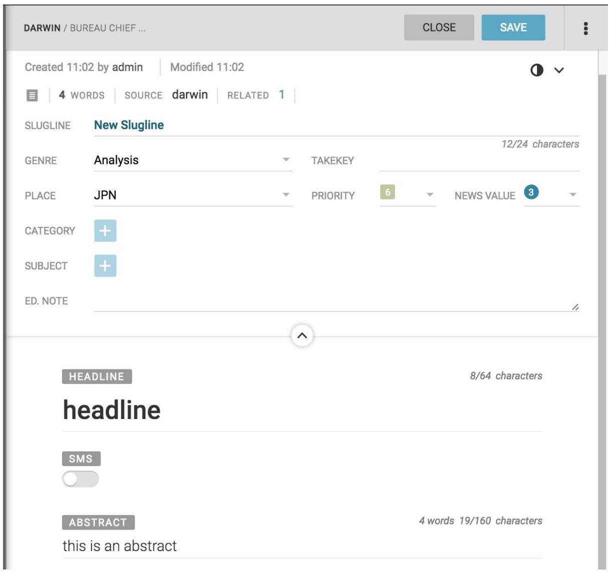


Example Editor Workflow

As an editor for a particular news beat or topic desk, you will likely spend most of your time monitoring issues, editing content submitted by reporters and publishing content. This article outlines the most useful tools and time-saving features for editors within Superdesk.

Once an admin creates an account for you in Superdesk, you will receive an email with login instructions. The admin will also assign you to the appropriate topic desk(s) and set your permissions and privileges within Superdesk.

Editorial Notes



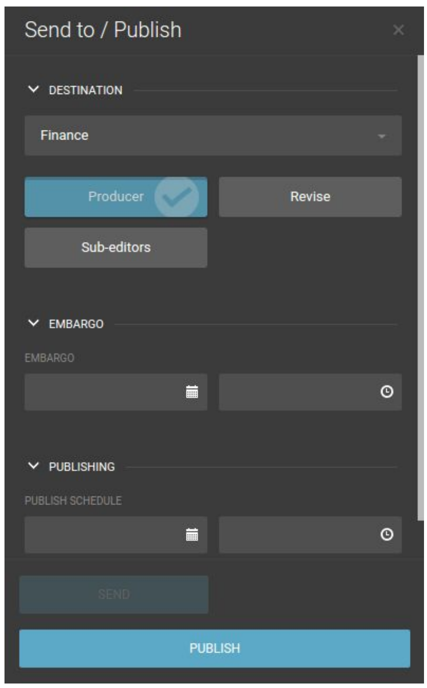
A section for Editorial Notes in the article entry provides a means for adding notices to content that will be sent to subscribers.

Editorial notes can be entered anytime before an article is published, by entering text in the editorial notes line of the article metadata.

Assigning Work Stages & Publishing Content

To publish content or send it to a particular stage in the content workflow, click the *Send To* button on the right-hand corner of the workspace window. A pop-up menu will appear with options to select the destination topic desk and stage (i.e. Bureau chief in, Bureau out, etc.), to set an embargo until a certain date and time, to set a publishing schedule or to publish the content item directly.

Stages for each topic desk are set up by your administrator.



Note: setting an embargo date does not prevent an item from being published, but marks it with a date and time that the item should not be published before.

Customized Workflow

Based on workflow (desks, stages,...) configuration the content can go through various stages of editing and approvals, or it can be published directly if the authors have the appropriate rights/privileges. The workflow for each topic desk is desk specific, so you can have some desks with users who can publish directly and other desks with a more complex workflow that suits your newsroom.

Monitoring Content & Issues 

Monitoring enables you to easily observe content activity, incoming RSS content and items being produced about a particular issue. This can be done via the Monitoring View (clicking the Monitoring icon on the Workspace Panel) or by setting up Monitoring widgets on your topic desk dashboard.

To set up a widget, click the *home* icon on the Workspace panel. If you are assigned to multiple desks, make sure you select the correct topic desk from the Desk menu) and then click the  icon on the top-right corner of the screen. Select *Monitoring*, *Add this Widget*, and then click *Done*. To modify the settings of the new widget, click the gear icon located on the top-right corner of the widget. In the monitoring widget settings, you will see a list of topic desks. You can switch the toggles on for the topic desks you wish to monitor (blue means on, grey means off) and select the states within each topic desk that you want to include in the display. You can arrange the order of the Saved Searches and topic desks stages listed in the widget by clicking the *Reorder Sections* tab and dragging and dropping them into place. You can also adjust the number of items you'd like to display for each section of the Monitoring widget.

Monitoring Saved Searches

Saved searches are a great time-saving feature. To create a Saved Search, first click the *Search* icon on the Workspace Panel and set the parameters for your Advanced Search. When you input your desired Search parameters, a blue button reading *Save Search* appears at the bottom of the screen. You should now see the saved search by clicking on the Saved tab of the Advanced Search window. Remember to toggle Global Read to the on position in the Saved Search window to make it available for your monitoring widget

To set up a widget monitoring a Saved Search, follow the same instructions to add the Monitoring widget. This time when you modify the settings, click the *Saved Searches* tab and select from the list of Global Saved Searches.

Bundling Images and Text Items Together

To pair images with text articles or other images, create a package and add the plain text items and image(s) to it.
There are several ways to create packages. See "Superdesk Packaging" for detailed instructions. Note: In order to add an item to a package, it will have to exist within one of your assigned topic desks. If it doesn't, you can fetch the item by finding it via Search, then selecting the checkbox in the top-right corner of the item and clicking the *Fetch to* icon.

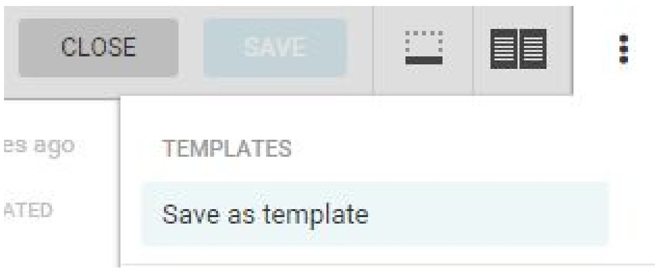
 Selecting the Fetch to icon opens a window where you can select the topic desk and stage you would like to send it to. Note: If you select *Fetch* instead of *Fetch to*, the item will automatically be sent to the last topic desk you were on.

Spiking 

Spiking an item removes it from the desk workflow. It is not a hard deletion, but a removal. To view spiked items for your current topic desk, navigate to the Spiked Items icon via the Workspace Panel. To Spike an item, click on the Action menu and select *Spike Item*. Spiked items can be Unspiked unless they were spiked from a Personal Workspace.

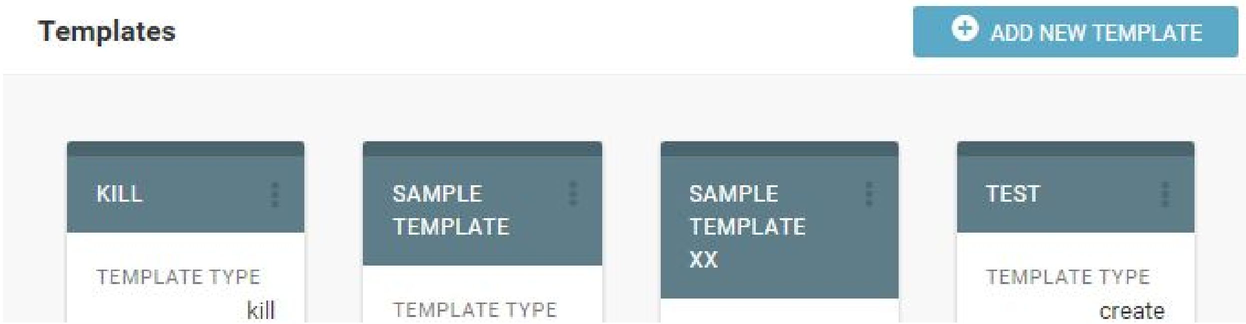
Other Useful Features & Tools

Templates



Any article can be saved as a template (a complete copy with all metadata) by clicking on the Action menu and selecting *Save as template*. A new window opens prompting you to name the template and to select its type (from Create, Highlights or Kill) and assign it to a topic desk. To do this, check off the Desk Template checkbox and then a drop-down list of topic desks appears.
Creation templates create content with a specific profile. Highlights templates configure certain elements from multiple articles to be displayed as flat/digest files. These templates can include the essentials, like Headline, Abstract and Byline of a group of highlighted stories. Once the template is created, you can easily generate the highlights daily/weekly/hourly etc. You can also send out digests with a list of all the items in a highlight so that subscribers can go through the wire to find the original files.

Admin users can set up templates so that they can be used by all members of a topic desk. To do this, admin users select Add New Template from the Templates tab in the Settings option from the Settings menu. Admin users can also edit existing templates and adjust further settings.

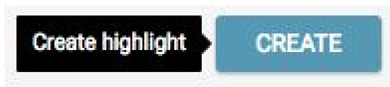


Another useful Templates feature is that templates can be assigned to a stage and scheduled to run at predefined days of a week and times of day. When this option is turned on, a new item is automatically created and sent to the specified topic desk and stage. For example, the Entertainment Desk might schedule a box office report to drop into the working stage at 6am every Monday for a reporter to pick up.

Multiedit 

The *Multiedit* button allows you to toggle between multiple open content items, as well as to display two plain text items side by side in editing mode.

Highlights 



The highlight icon located on the Workspace Panel allows you to view all the items you have highlighted and Highlights for the topic desk you're currently on. To create a new Highlights list, go to settings from the Settings menu in the top-left corner. There you can select the Highlights tab and hit *create configuration* to create a new Highlights list.

To highlight an item, click on the Action menu for a particular item and select *Mark item for* and then select the Highlights list you would like to add the item to.

Versioning 

While an item is open for editing, you can click the *versioning* icon located on the Editing Info Toolbar on the right-hand side of the screen to display and revert back to previous versions. Every time an article is saved, Superdesk will retain a copy of the article in its previous forms. These copies can all be accessed from the versioning icon. Reverting to a prior form of an article will not delete the version that you just reverted from.

Personal Workspaces and Personal Items

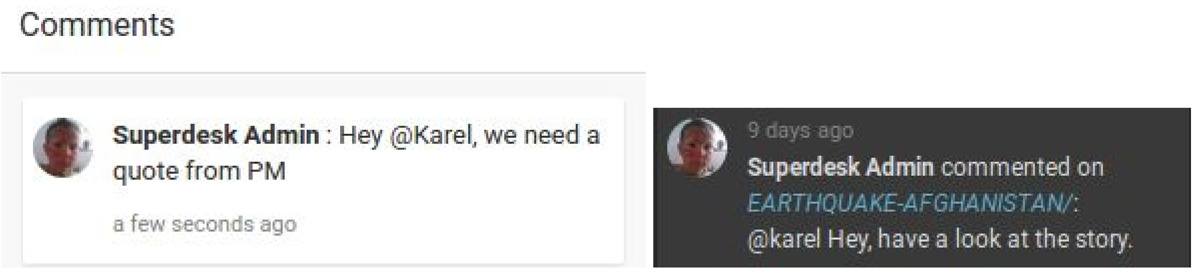
Personal Workspaces are customizable workspaces accessible from the Desk menu. Here you can create new workspaces with widget setups customized for your own workflow.

Only you can access your Personal Workspaces. Unlike topic desks, which have a single Dashboard that is shared between all users of that topic desk, your Personal Workspace has its own Dashboard with widgets that only you can see.

Personal Items is an icon located on the Workspace Panel. 
This displays all the Personal Items you have created either in your Personal Items tab, or in your Personal Workspace. Only you can view or edit your Personal Items. To create a new Personal Item, click the + icon in the top-right corner of the Personal Items window.

Comments 

Users can add Comments to each content item with Twitter-like @username mentions. This is useful for alerting other topic desks or users to the content in a hurry. To add a comment, click on the comment icon on the Editing Info Toolbar (located to the right of an open article entry). Whenever a user is mentioned, he or she gets notified within the system and can also receive an email with a direct internet link to the item. Note: this email notification can be turned off.

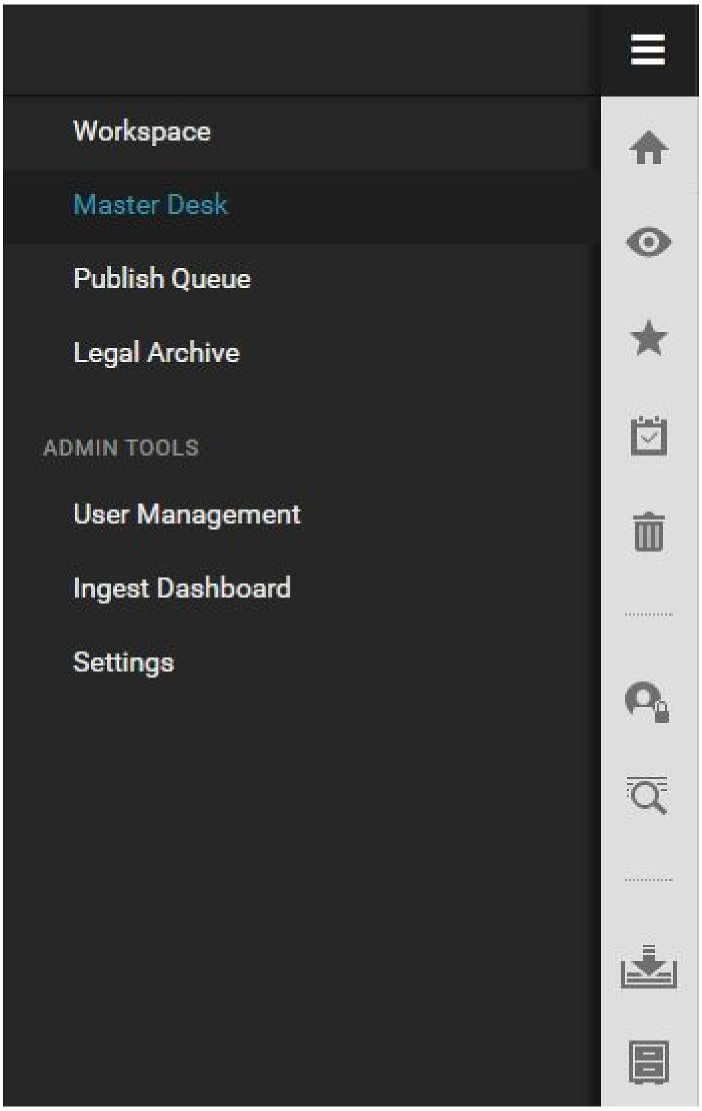


User Profile Settings

To view and adjust any of your profile settings, click on the user icon located in the upper-right corner of the Superdesk interface. When you select the *profile* link under your user name, an overview of your profile information is displayed. You can also set your preferences, view your privileges and and view your activity stream. User privileges are set by administrators in the User Management area of the Settings Menu.

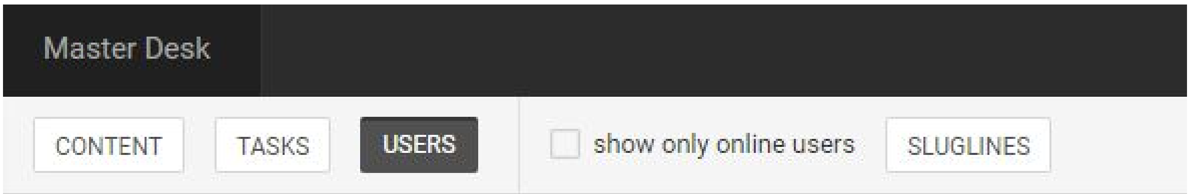
Master Desk

The admin functions can be accessed from the Settings menu, found in the upper left corner of your Superdesk interface.

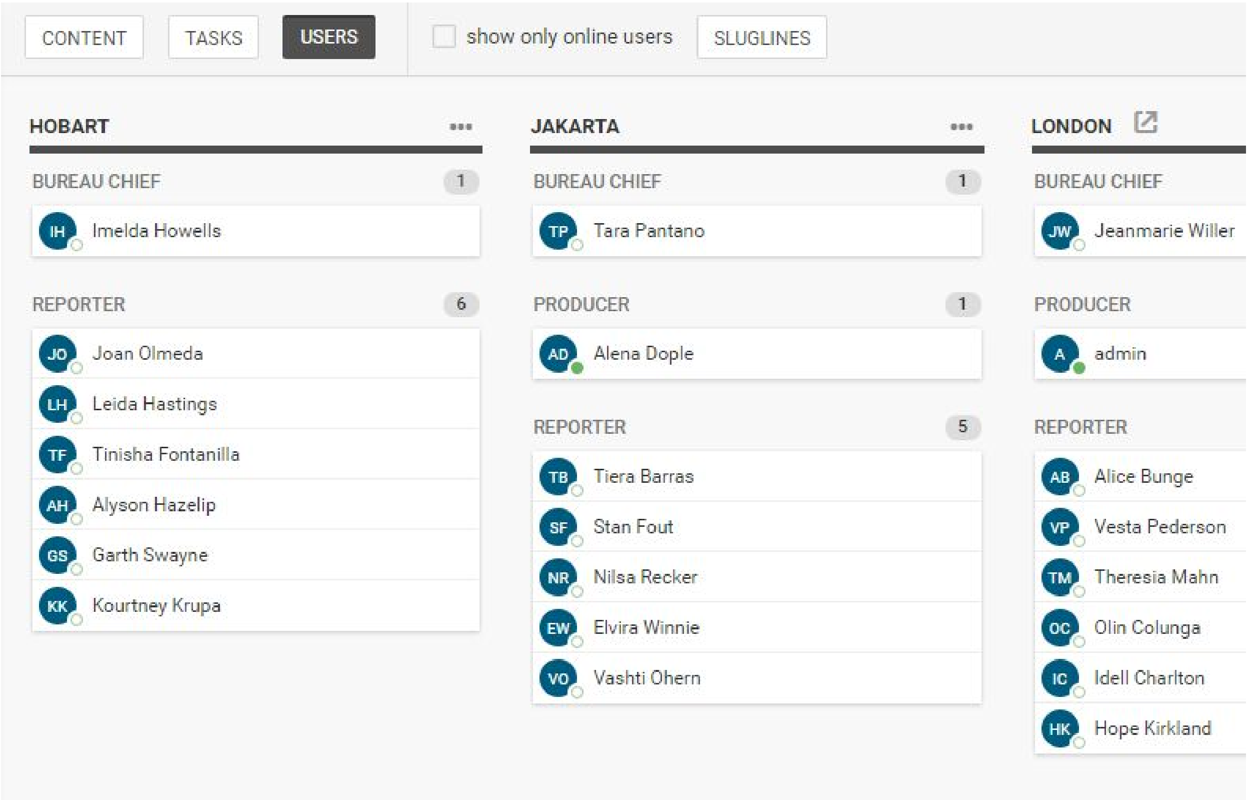


From the Settings menu, you are able to add new users, configure and create desks, customize your monitoring and ingest settings.

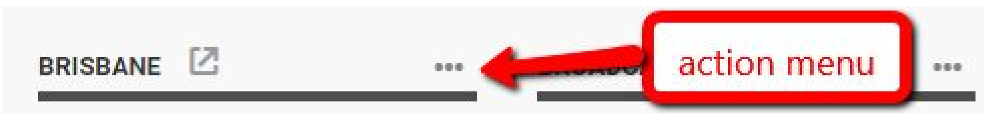
The Master Desk menu item provides you with an overview of the content, users and tasks associated with every topic desk. The Master Desk gives an overview of all the topic desks all in one place. Not all users will have access to the Master Desk, only users with the appropriate permissions will be able to see it.

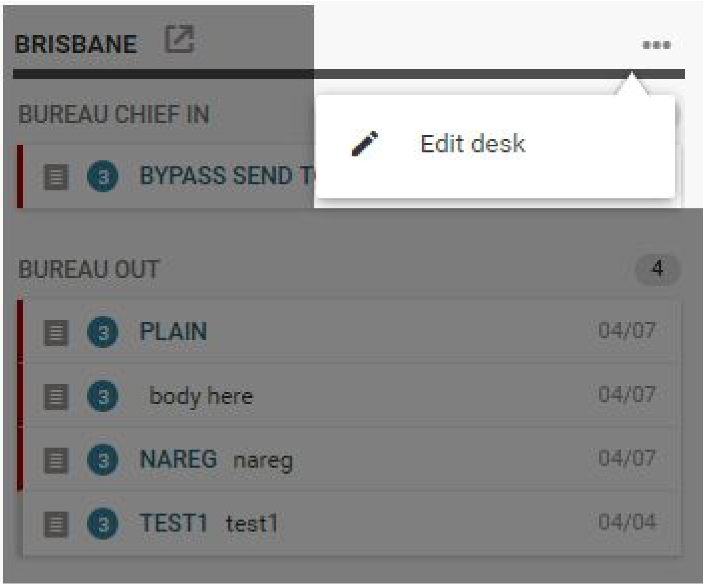


You are able to navigate between different desk information by clicking the *CONTENT, TASKS*, *USERS* or *SLUGLINES* buttons at the top of the Master Desk window. The *CONTENT filter* gives an overview of all the articles that are currently in the desks, regardless of the stage. The *SLUGLINES filter* shows published Sluglines for each desk.



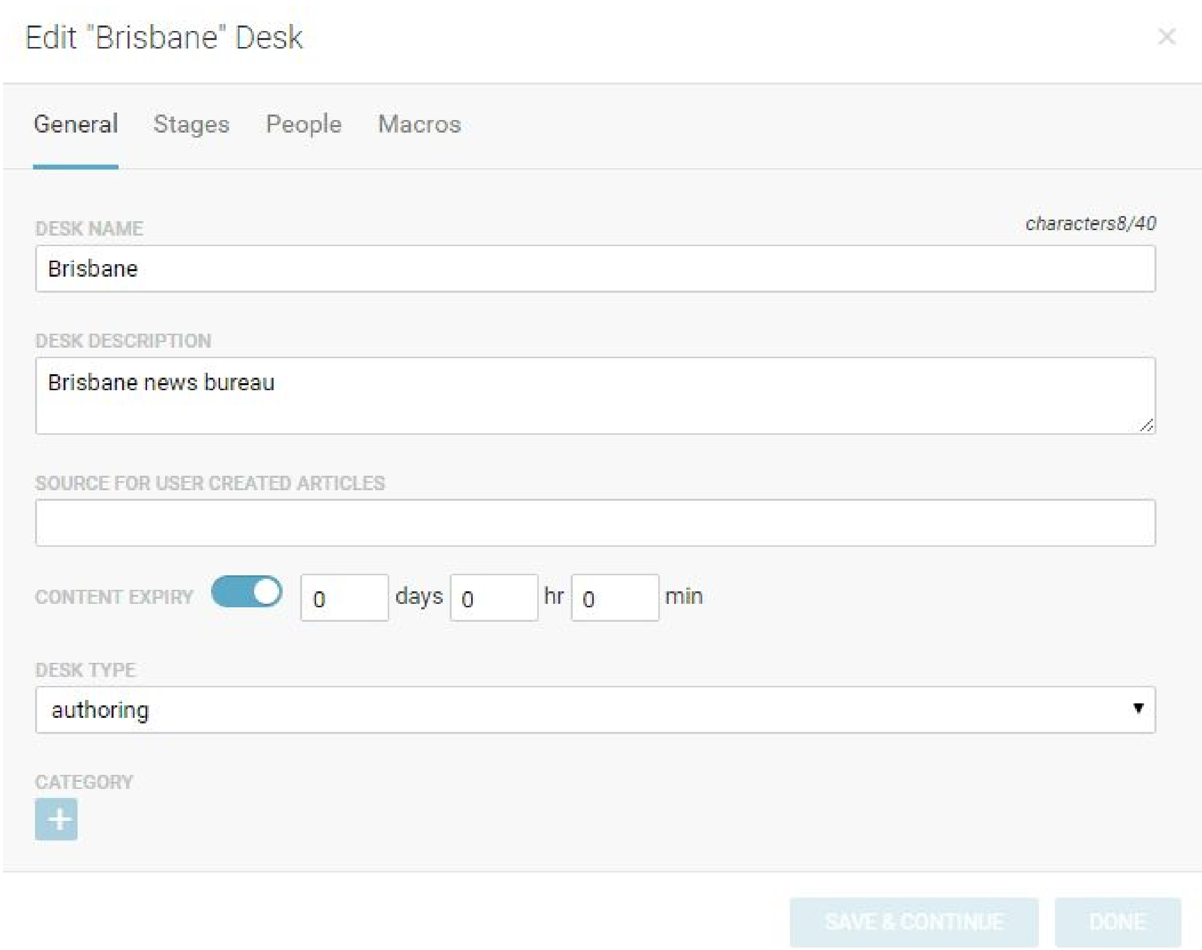
The *USERS filter* option shows users that are assigned to each topic desk. Users are arranged by role within the Master Desk; for example Bureau Chief, Producer, Reporter, etc. The USERS filter also includes a checkbox to view only users that are currently logged in to Superdesk.





Each desk also has an Action menu, which allows you to change the stages, users and desk information. Click the Action menu and select *Edit Desk* to configure the desk settings.

If you are assigned to a desk that you are currently viewing in the Master Desk view, you will see a pop-out icon beside the desk title. Clicking on this *Open Desk Content* icon will take you out of the Master Desk view and back into the Superdesk Workspace of the topic desk you just clicked on.



When you click the action menu and select edit desk, a new window will open. Under the General Settings tab, you will find the following information to edit:

DESK NAME allows you to change the name of the selected topic desk. This is the name all users within Superdesk will see.

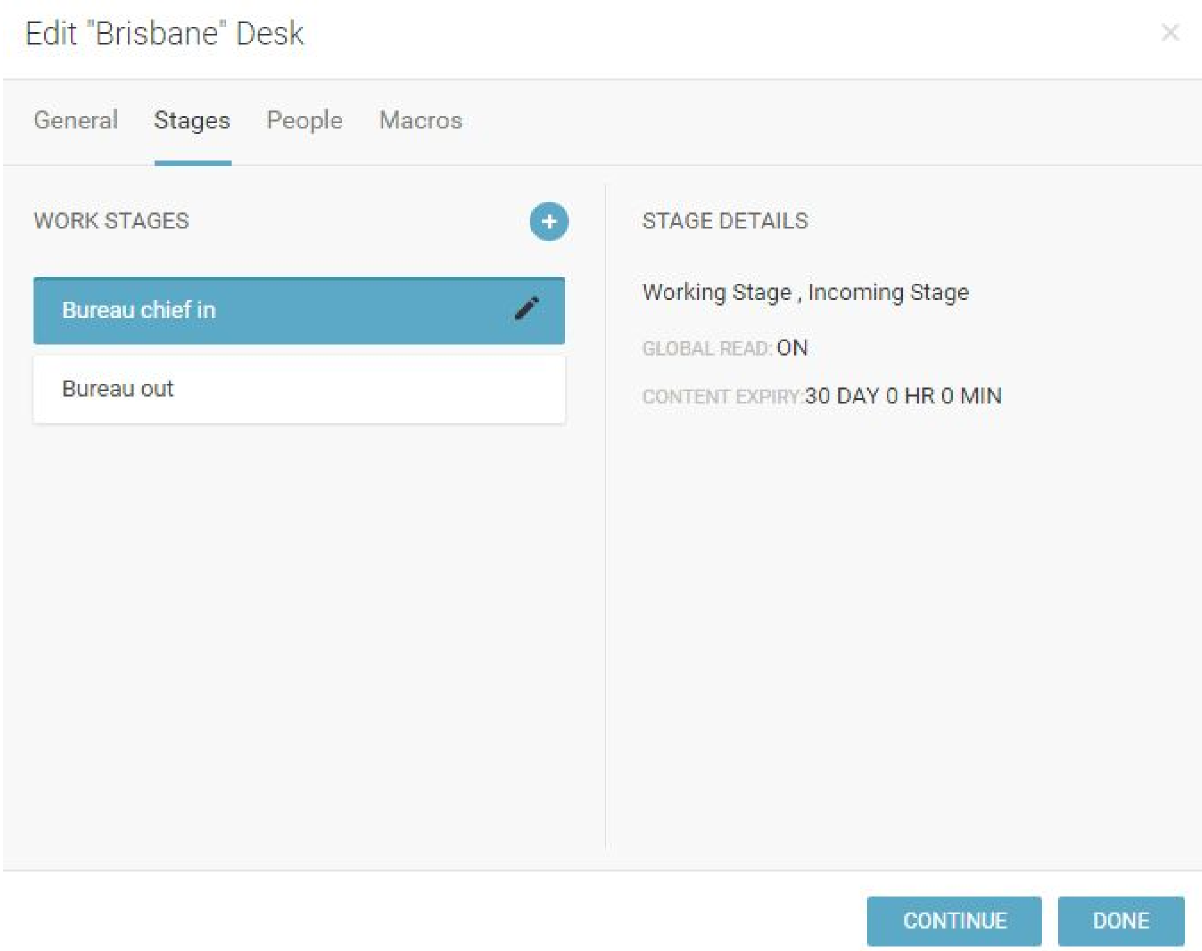
DESK DESCRIPTION provides information to other users about the topic desk.

The SOURCE FOR USER CREATED ARTICLES field is used to populate the Source field in every article created in that topic desk. The text that you input in the SOURCE FOR USER CREATED ARTICLES textbox will appear in the metadata for all the articles produced from this topic desk.

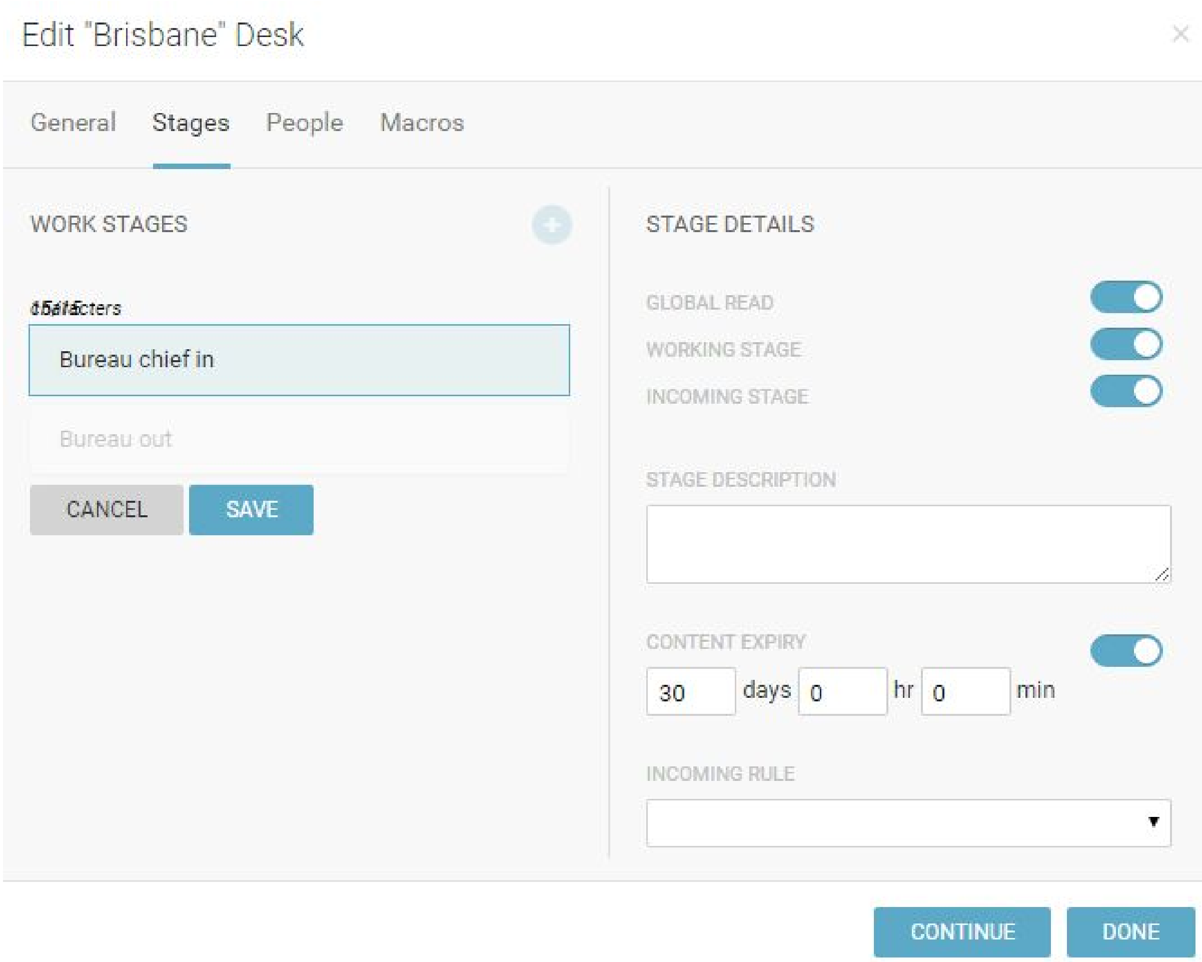
CONTENT EXPIRY sets the amount of time before any item is sent to the Archive. Archived items can no longer be seen in a topic desk but can still be found through Search tab.

DESK TYPE can be set to either authoring or production. An authoring desk generally only produces content but does not publish it. These tags allow users to search through content that has been created at an authoring desk.

In the Edit Desk window, you will also find a Stages tab. Stages are the steps an article must go through to get to publishing. From this tab you can create new stages to a desk by clicking the Create icon: 



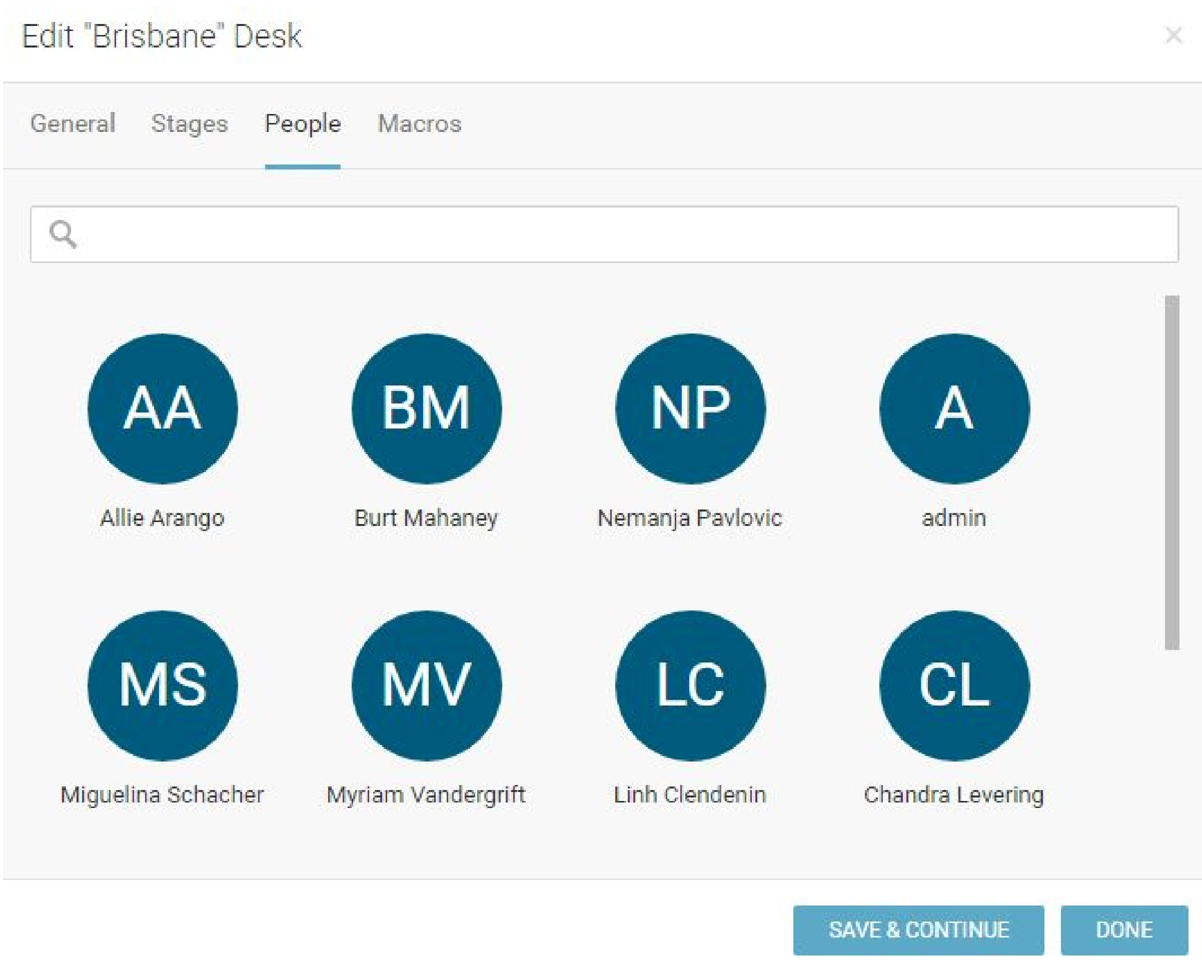
You can edit the current stages by hovering over the stage you wish to edit and clicking the pencil icon that appears to the right of the stage name.



The GLOBAL READ toggle allows items that are in this stage to be read by all users. If GLOBAL READ is turned off, only users assigned to the topic desk will be able to see content from that stage. The WORKING STAGE toggle indicates that any new text or package created in this topic desk will be sent to this stage. If INCOMING STAGE is selected, any item that is fetched to this topic desk will be put into this stage.

The CONTENT EXPIRY can be set to a number of days, hours or minutes to ensure that the most current news is being published. When the content expiry limit is reached, the article will be sent to the Archive and can no longer be accessed from the topic desk.

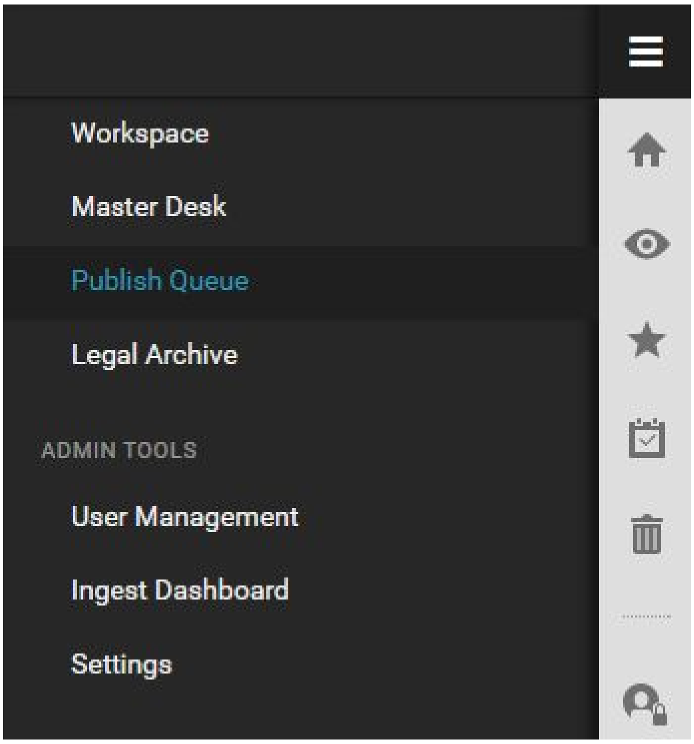
The INCOMING RULE drop-down menu allows for standardized modifications to be made on articles that are being fetched from the Ingest to a desk. This could include modifications like automatically filling in a dateline or an abstract, or converting currencies. These rules are set up in the Macros tab of the Edit Desk window.



In the People tab of the Edit Desk window, you can add or remove users from the topic desk. To add a user, type their name into the searchbar. When you select the name of the person, they will be automatically added to the desk. To remove a user from the topic desk, hover over their user icon and click the *x* that appears on the top-right section of their user icon.

Publish Queue

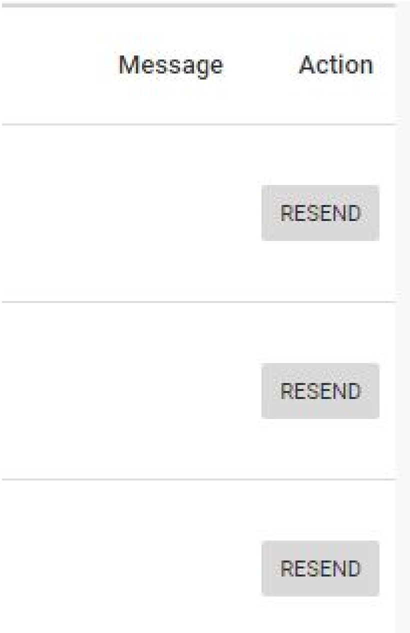
Users can access the Publish Queue from the Settings menu in the top-left corner of the Superdesk interface.



Depending on user permissions, not all users will be able to access the information in the Publish Queue menu item.

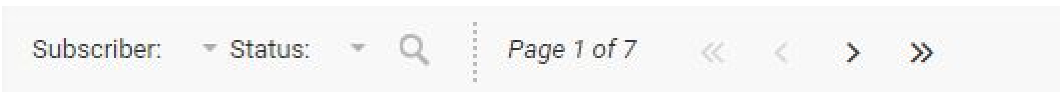
Sequence No	Unique Name	Headline	Content Type	Publishing Action	Subscriber	Destination	Queued at	Scheduled at	Transmitted at	Status
46	#4980	Digital Influencer Dion Hinchcliffe: Power Of The Network	composite	published	nareg2	nareg2	18.04.2016 13:39:11			in-progress
45	#4980	Digital Influencer Dion Hinchcliffe: Power Of The Network	composite	published	nareg2	nareg2	18.04.2016 12:11:13		18.04.2016 12:11:15	success
42	#4971	Digital Influencer Dion Hinchcliffe: Power Of The Network	text	corrected	nareg2	nareg2	18.04.2016 11:17:47		18.04.2016 11:17:55	success

The Publish Queue displays a list of all of the items that are scheduled to be published or have been published. Every article in the Publish Queue comes with a unique number identifier and a sequence number. The Status column will tell you if an article failed to publish successfully.

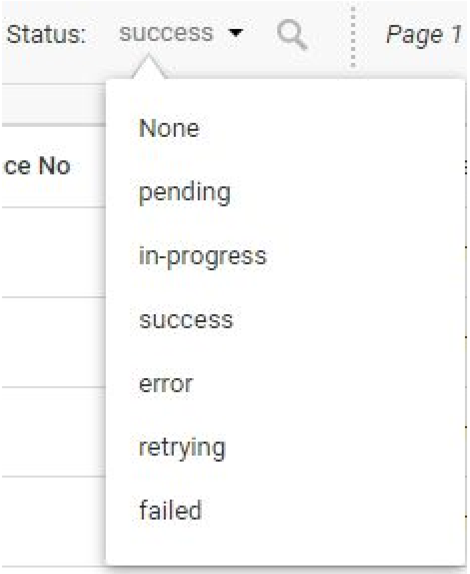


The column on the far right of the article entry has a button to resend an article. It is possible to resend articles that have successfully published. If you choose to resend an article, the unique name identifier will stay the same, but a new sequence number will be assigned.

If you click on an article in the Publish Queue, a tab will open on the right with an article summary. No items can be edited from the Publish Queue.



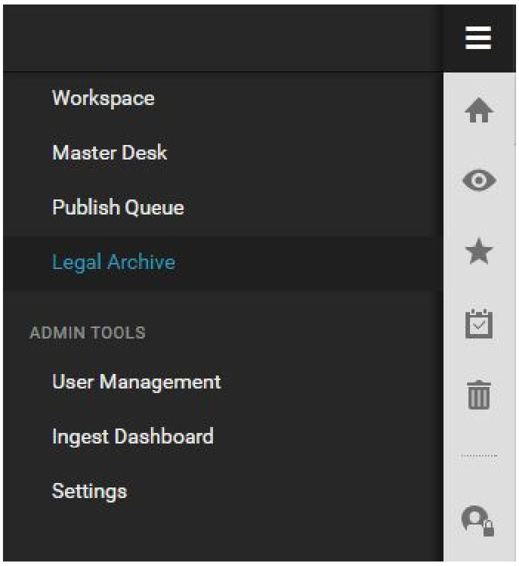
You can navigate through the Publish Queue by using the page arrows beside the search icon at the top of the Publish Queue window.



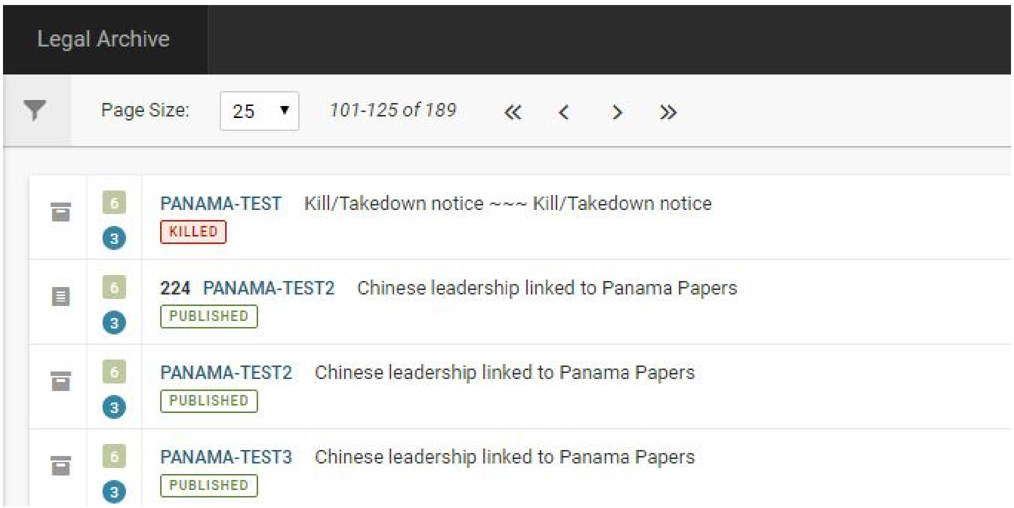
To sort the view order of the articles in the Publish Queue list, click the Subscriber or Status drop-down menus and select from the displayed options. You can also search the Publish Queue by clicking on the search icon and inputting keywords from the headline of the article that you're searching for.

Legal Archive

Your Superdesk Legal Archive provides a copy of every article that has ever been published. The Legal Archive includes articles that have been killed and articles that have been corrected.

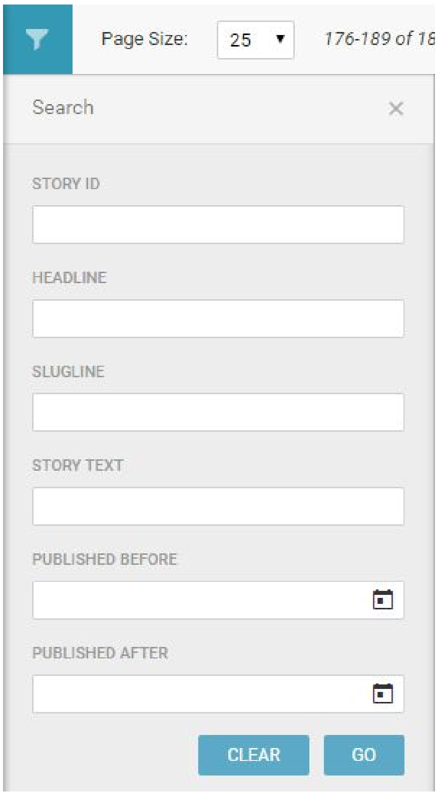


Admin users can access the Legal Archive from the Settings Menu in the top-left corner of the Superdesk interface.

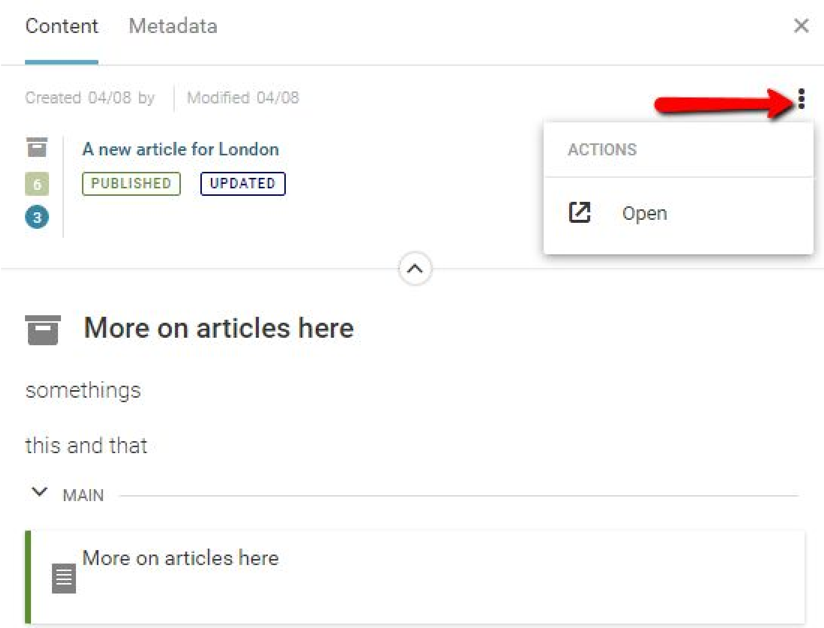


 This is the Search icon.

You can search the articles in the Legal Archive by clicking the search icon in the upper-left corner. This will open a tab on the left where you can input search criteria in various textboxes.



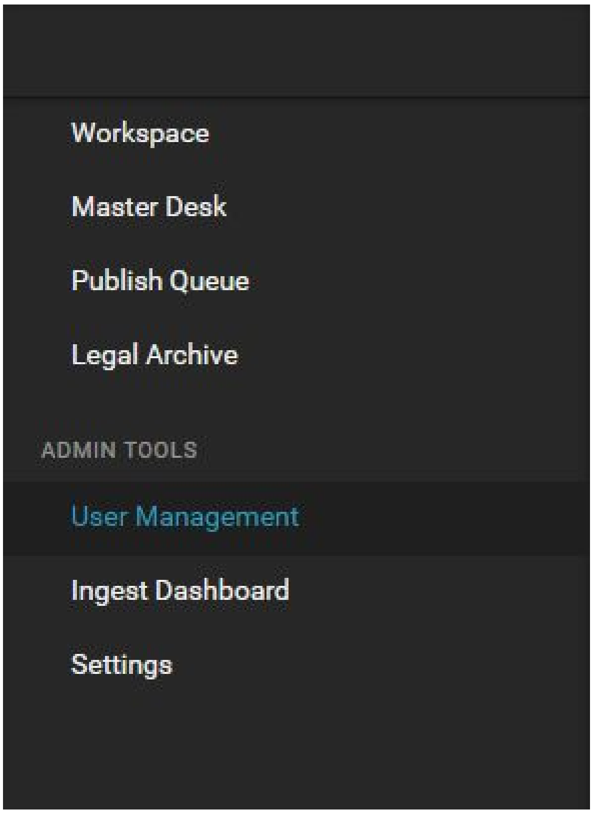
You can search by Story ID, Headline, Slugline, Story Text keywords, or by publishing dates. You can adjust how many entries are displayed per page by using the drop-down menu beside Page Size.



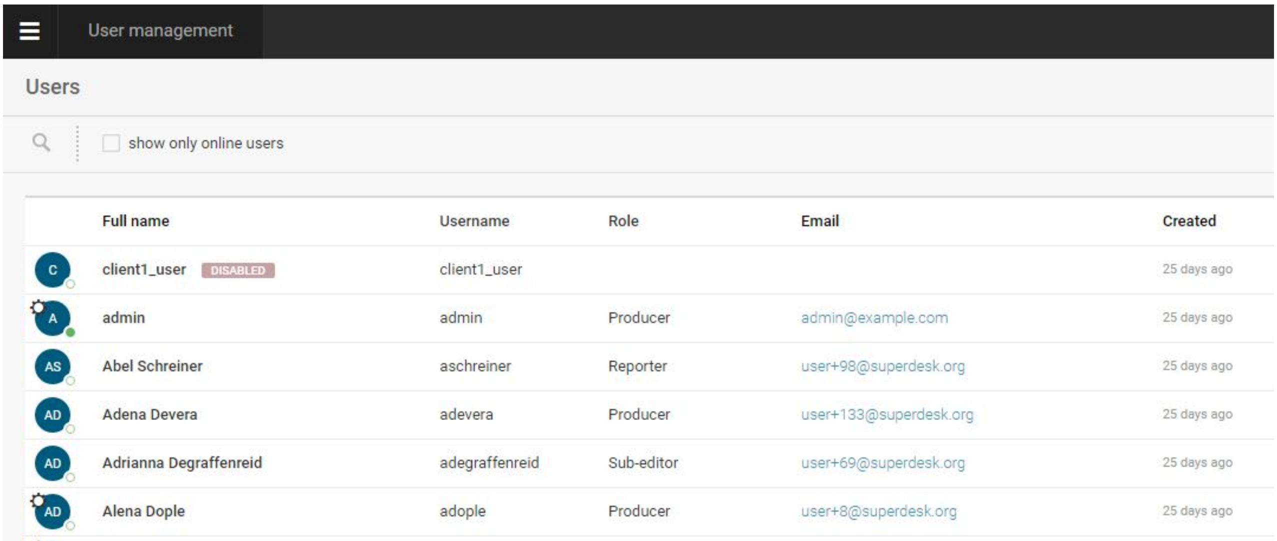
Articles from the Legal Archive can be previewed by clicking on them. A tab will open on the right with an overview of the article metadata. To open the article in its full form, click the Action menu and select *Open*. Note that articles in the Legal Archive cannot be edited or deleted.

User Management

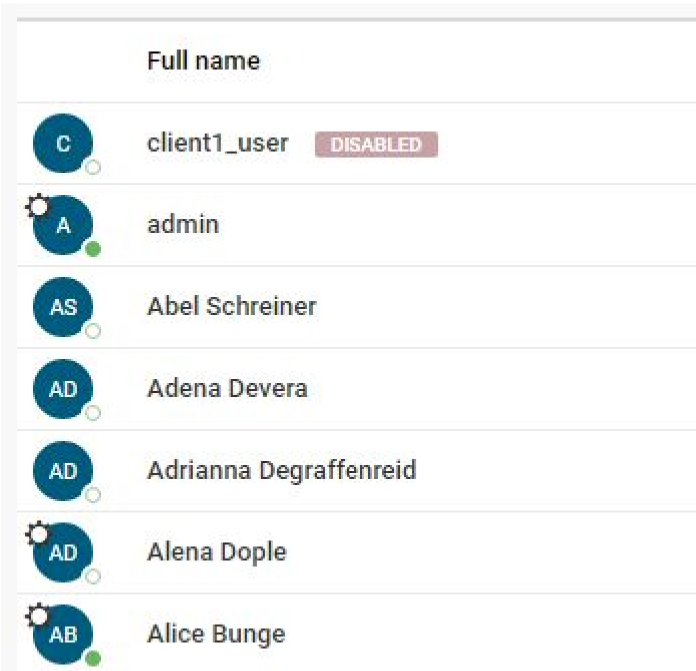
The User Management admin tool allows admins to create, disable, edit and delete Superdesk user profiles.



Admins can access the User Management settings from the Settings menu in the top-left corner of the Superdesk interface.



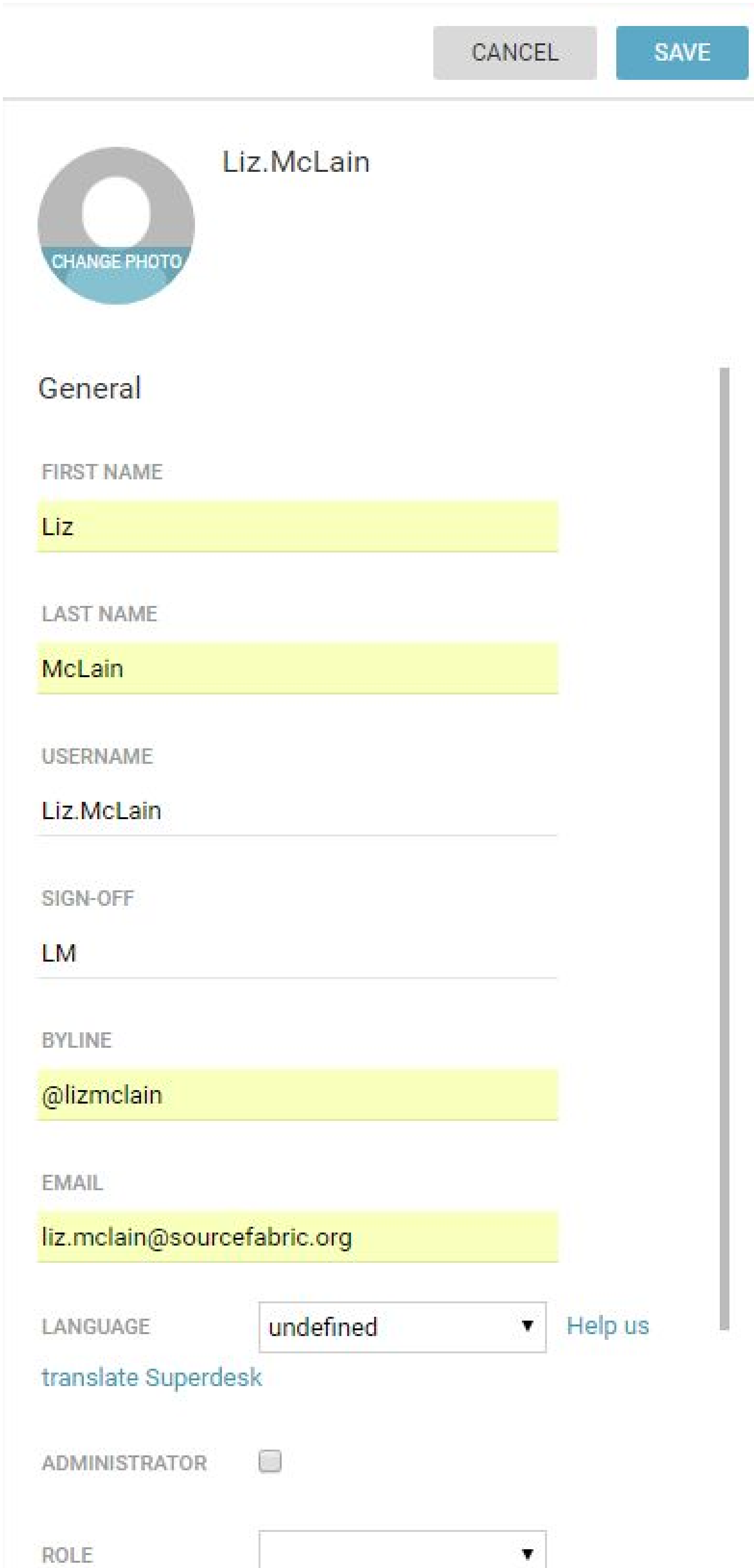
When you open the User Management menu, you will see a complete alphabetical list of all the Superdesk users for your news organization. You can search for a specific user using the search icon at the top of the window. There is also a checkbox you can select to only display users that are currently logged in to Superdesk.



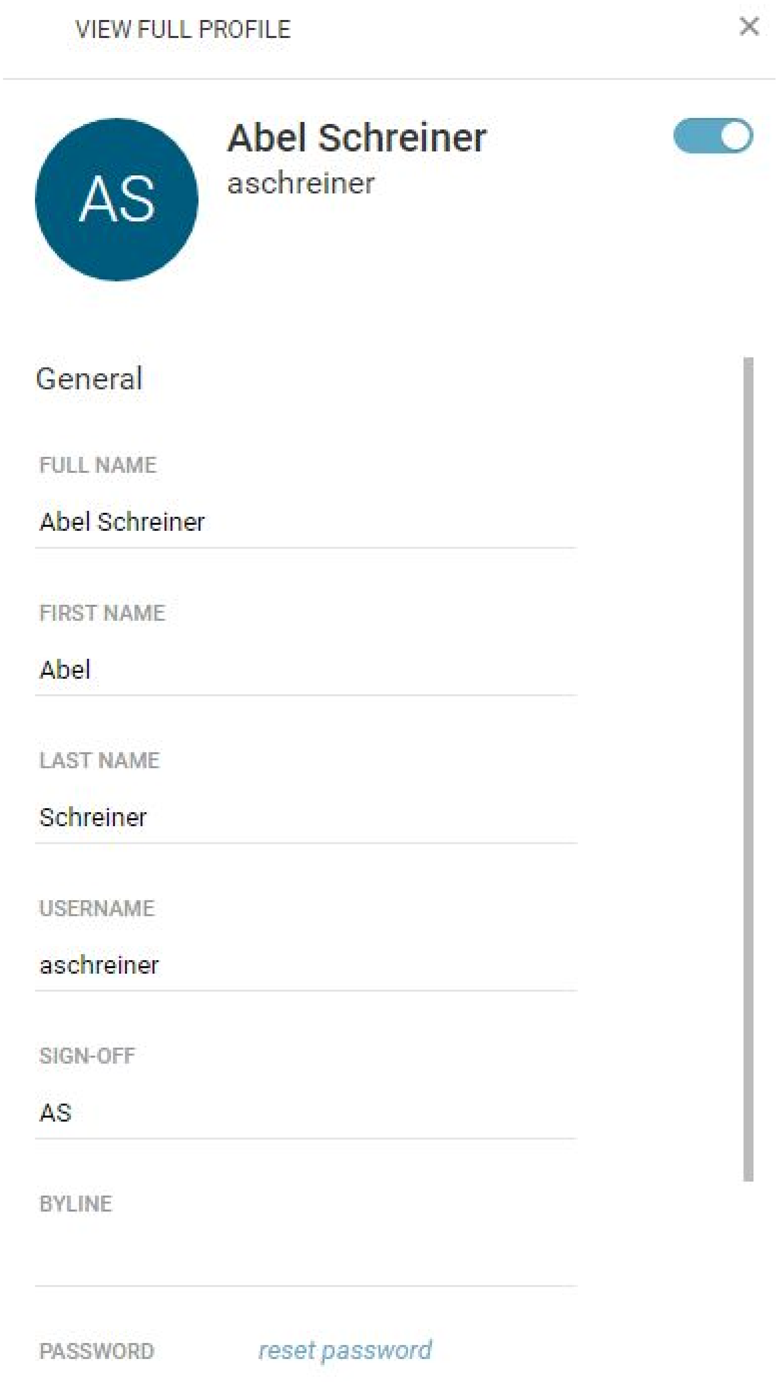
In the list, online users are marked with a solid green circle next to their user icon. Admins are marked with a gear icon on the top-left of their user icon. Special notes about inactive/ disabled users will appear in pink next to the user names.

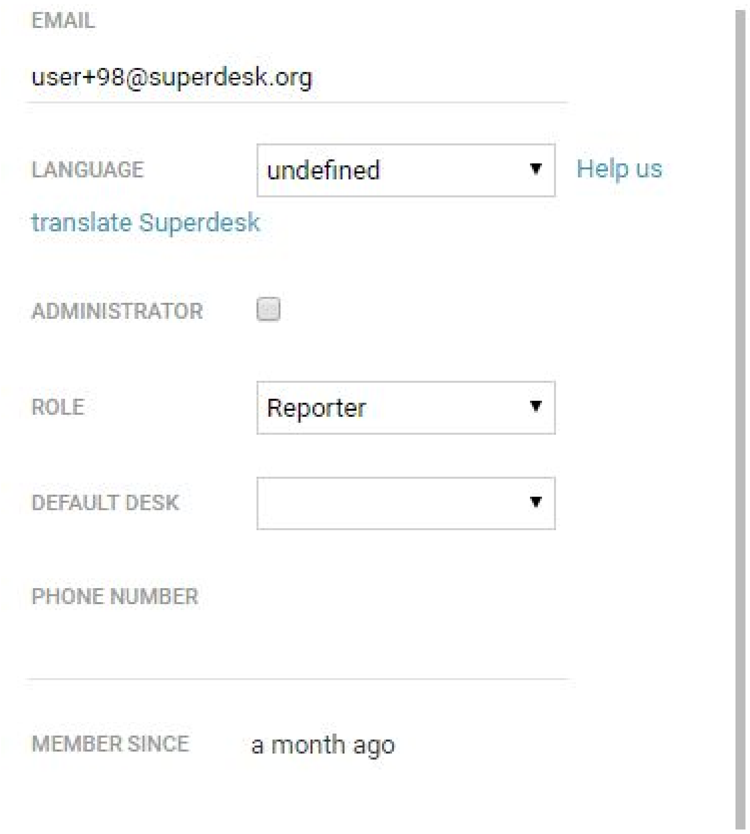
 This is the Create icon.

In the top-right corner of the User Management window, you can use the Create icon to add new Superdesk users. Clicking the Create icon will open a tab on the right where you can input all the data for your new user.

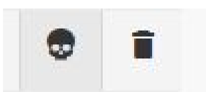


You can change the new user profile picture by clicking on the round grey user icon. You must input all the mandatory fields before you can save the new user profile. In the blank form, mandatory fields are marked by an asterisk. Once you click the blue *Save* button that appears at the top of the tab, an email will be sent to the user with instructions to set up their password and login information.



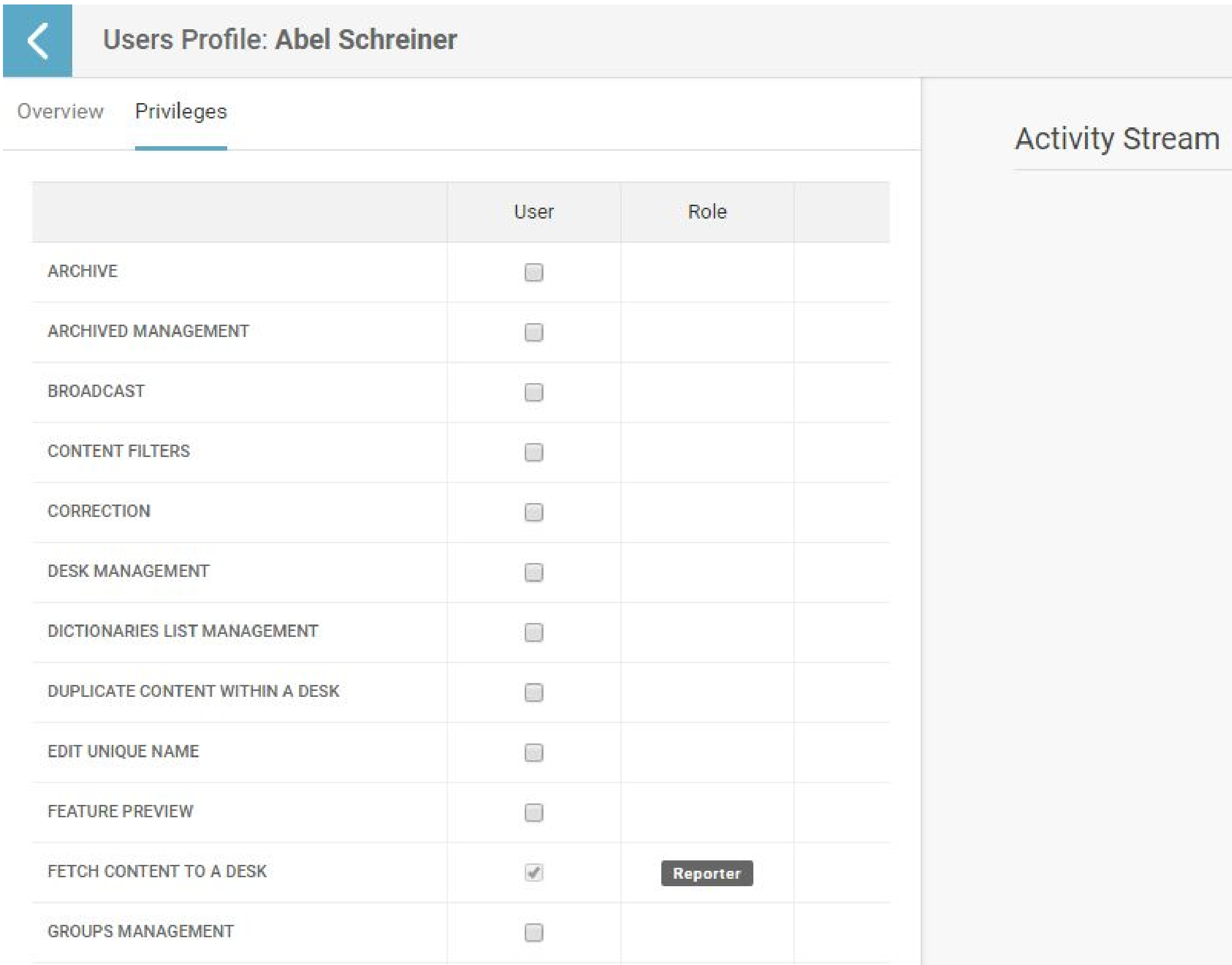


Clicking on a profile in the main User Management list will open a preview tab on the right. You can change the information in the text boxes, and then click the *SAVE* button that appears at the top of the user profile tab once changes have been made. In this tab you can also change the user role and their default topic desk. Changing a user role will affect the permissions and privileges of the user. There is a blue toggle at the top of each user profile tab. Switching the toggle to the *off* position will set the user to be inactive.



Users can also be deactivated by hovering over the user entry in the User Management list and selecting the trash icon that appears to the right of the user entry. Deactivated users will not be able to sign in to Superdesk. The skull icon allows you to clear all the user sessions.

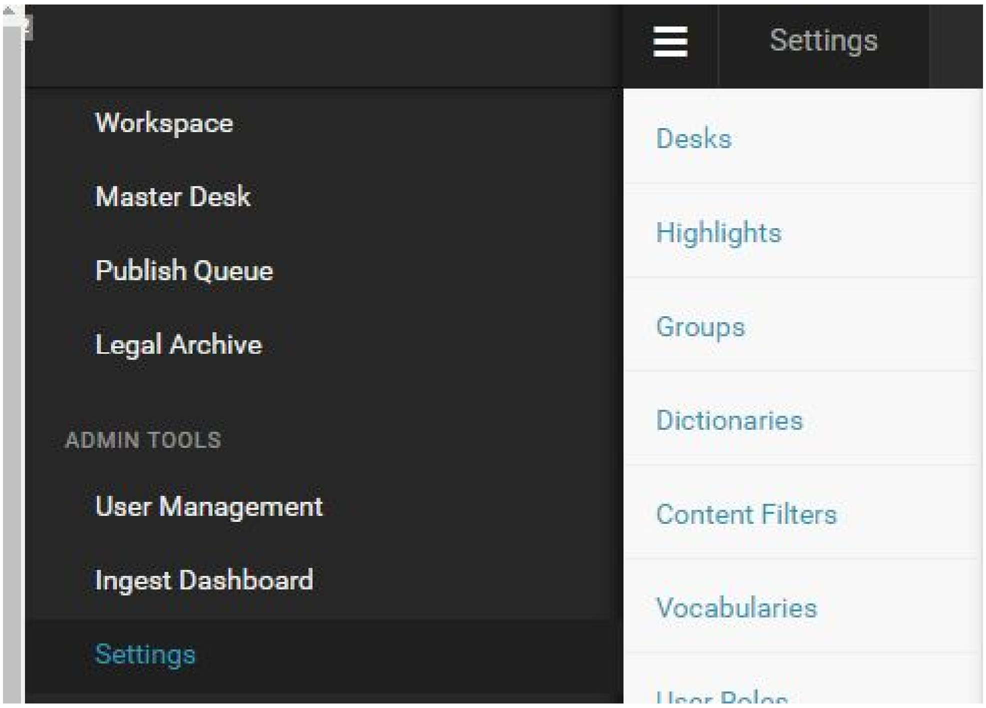
If a user has forgotten their Superdesk password, admins can open the user profile tab and click the *reset password* link to send an email to the user with instructions on resetting their password.



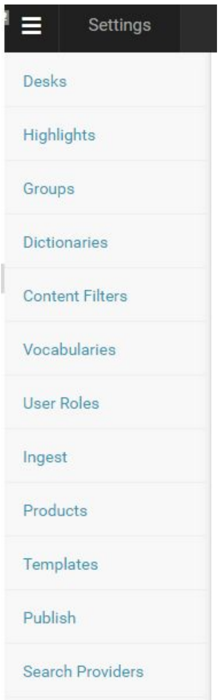
Clicking on the *VIEW FULL PROFILE* link at the top of the user information tab will open a new window where you can see the user's activity stream. This is also where admins can edit specific user permissions by clicking on the Privileges tab in the top-left corner. The information displayed in the Overview tab is the same as what was visible in the previous user information tab. To return to the User Management list, click the blue arrow icon in the top-left beside the user profile name.

Settings

The Superdesk Settings menu is where most of the newsroom workflow is set up. In the Admin tools section, under Settings is where you can create Desks and stages, manage groups, create Highlight lists, set default user privileges, edit your subscribers and create templates.



Administrators can access Settings area by clicking on the Settings Menu in the top-left corner of the Superdesk interface and selecting the *Settings* section listed under Admin Tools.

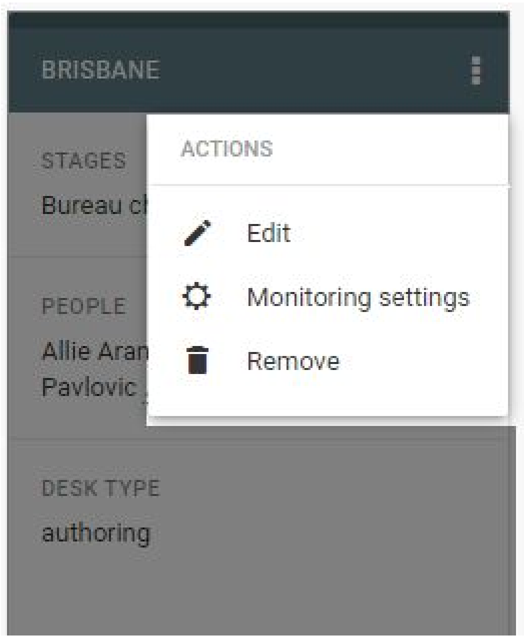


You will then see a list of features for which you can adjust settings. This is the menu that you will use to configure and customize Superdesk to meet the needs of your team.

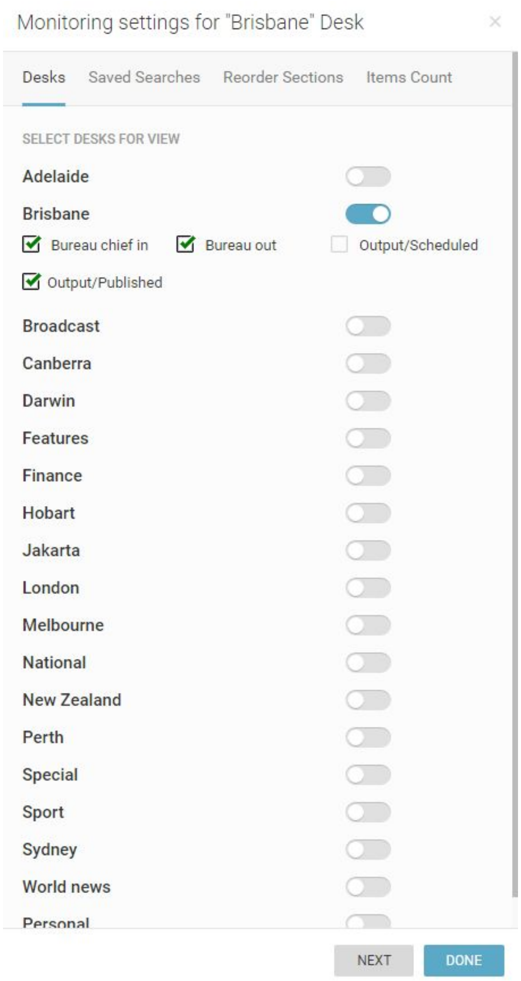
Desks

The *Desks* tab navigates to the Desk Management page, which enables admins to make changes to all topic desks. Some of these changes can be configured from the Master Desk (on the Settings Menu) but the Desk management page offers more complex setting possibilities. New Desks can only be created from this menu and not from the Master Desk area of the Settings menu.

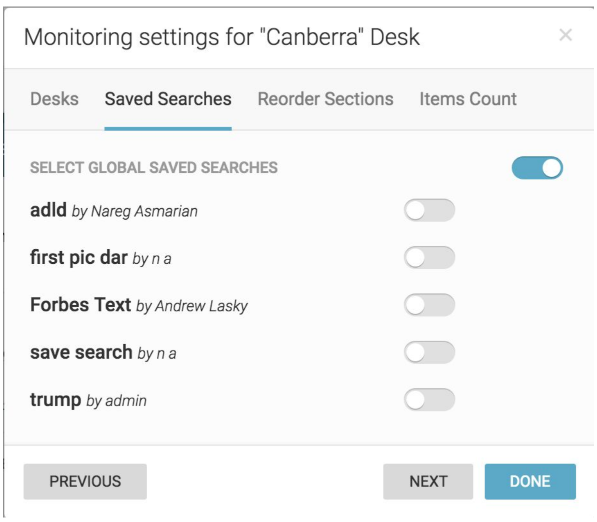
From the Desk Management page you can both create new topic desks and edit existing topic desks. To create a new topic desk, click *ADD NEW DESK* in the upper-right corner. To edit an existing desk, find the topic desk you wish to edit on the Desk Management page and click the Action menu to display the *Edit* button. For more information on the fields found in both of these functions, please see the Master Desk portion of the manual.



Admins can make changes to the Monitoring feature of each topic desk by clicking on the Action menu and selecting *Monitoring settings.* The Monitoring Settings window is where the information in the Monitoring area of the Workspace Panel is configured. The Monitoring display is the same for all users who share a topic desk.

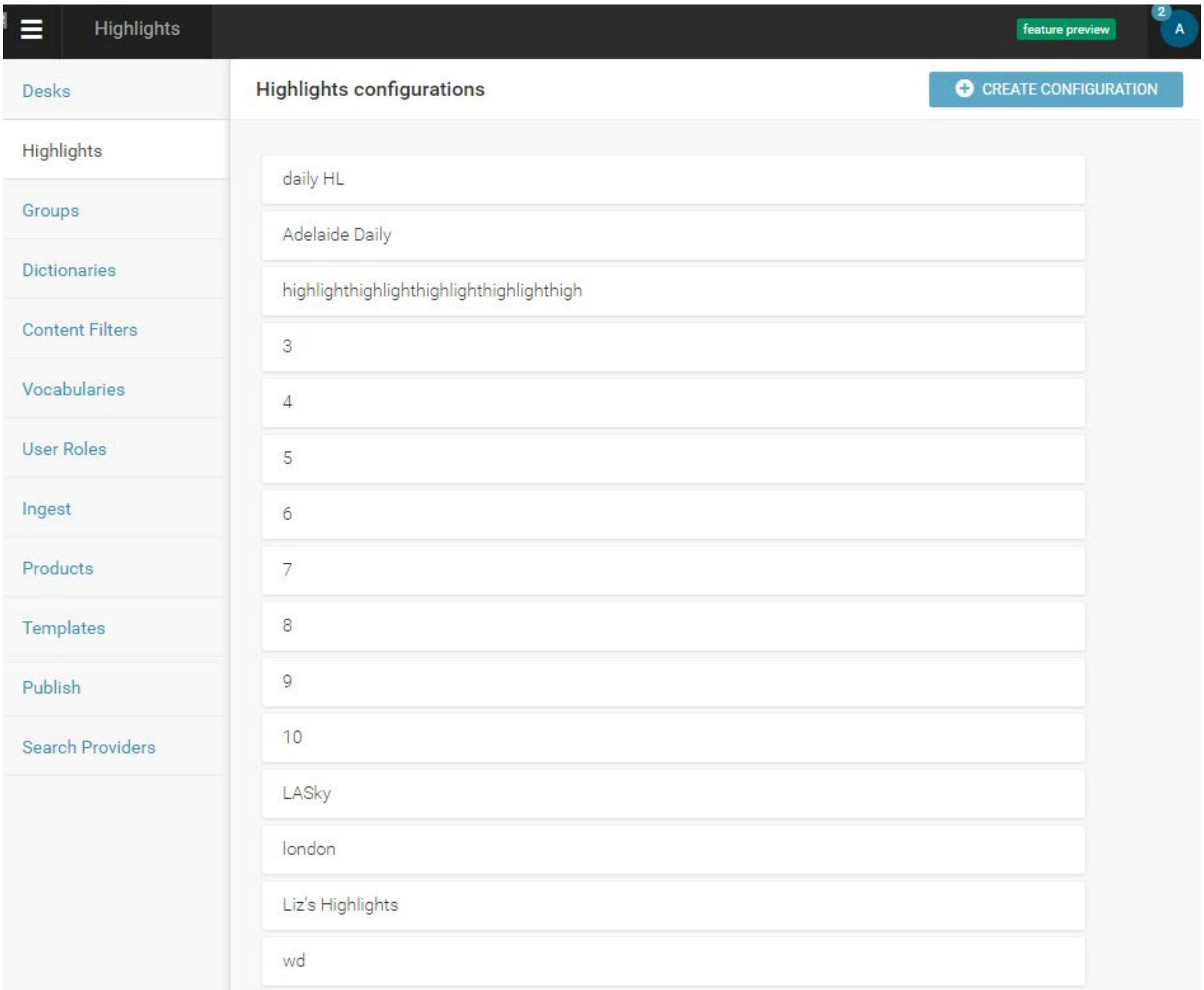


From the Monitoring settings window, users can select multiple topic desks to display in the Monitoring view. Keep in mind that all of these changes will be reflected in the Monitoring view of the topic desk you selected in Desk Management regardless of which topic desks you choose to monitor. Once a topic desk has been switched on, you can select from stages within that topic desk to display.



The Saved Searches tab in the Monitoring Settings window allows you to display Saved Searches in the Monitoring view. Saved Searches can be created in the Search tab of the Workspace Panel. In order to use them in a Monitoring view, make sure that your Saved Searches have the Global Read toggle turned on. (For more information on creating a Saved Search see the Search section of the Superdesk user Manual).

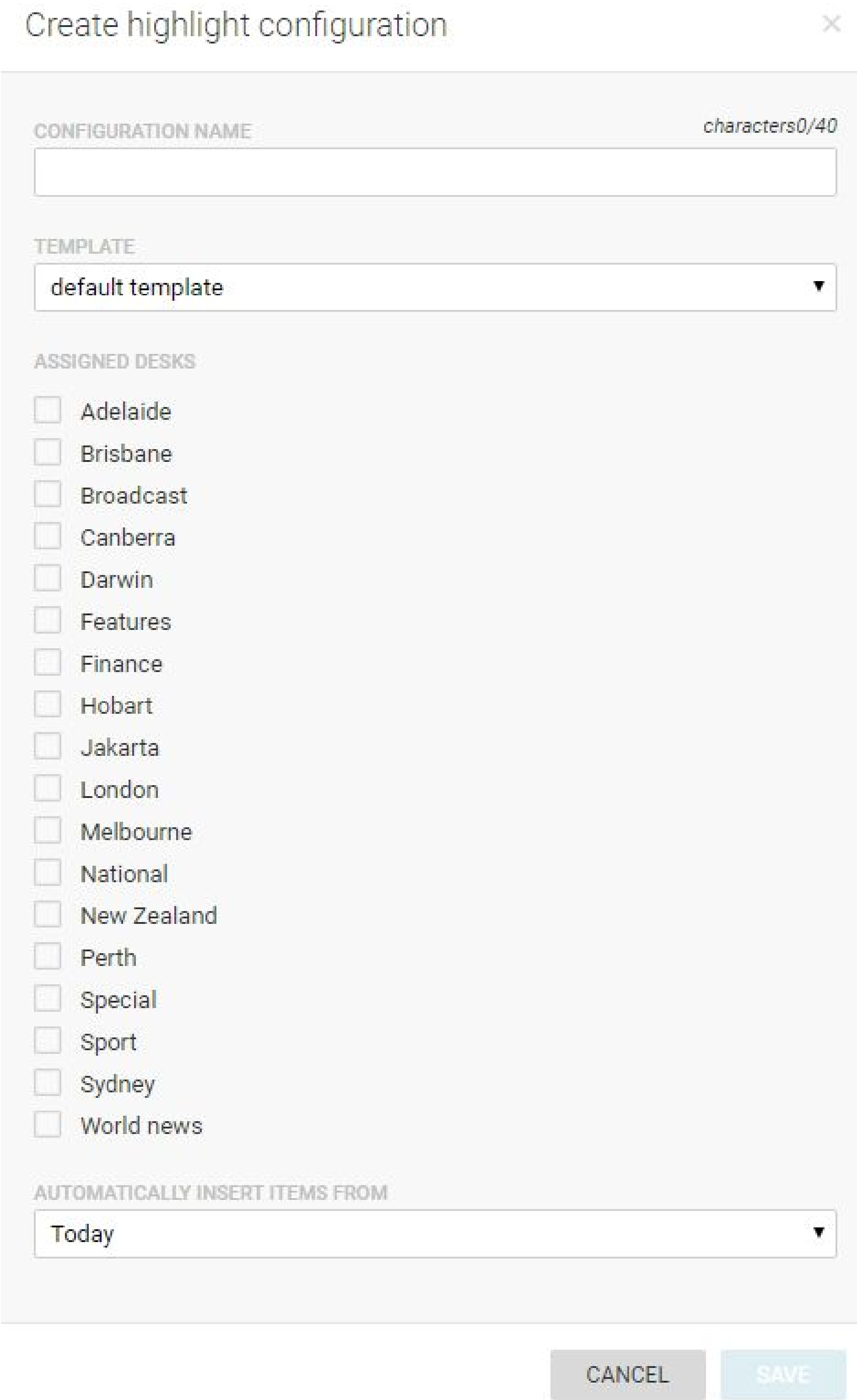
In the Reorder Sections tab of the Monitoring Settings window, you can arrange the order in which you display each item that you have selected for your Monitoring view.. Finally, the Items Count tab contains textboxes where you can input the number of items to be displayed for each Stage and Saved Search in the Monitoring view.



Highlights

Highlights allows for the creation and configuration of Highlight Lists. New Highlight lists can only be created from this menu.

To create a new Highlight List, click *CREATE CONFIGURATION* button located in the upper-right corner. This opens a new window with options from creating your new Highlight list.



The CONFIGURATION NAME field allows you to name the Highlight List. Template drop-down menu chooses the template that will be applied when a new article is added to this Highlight List. Assigned desks are the desks which will be able to view the Highlight List, additionally, these are the desks that items are automatically added from upon creation of the Highlight List. AUTOMATICALLY INSERT ITEMS allows you to choose the time frame in which items are automatically added to the Highlight List upon creation. For example, if you check the Adelaide topic desk and select 12 hours from the AUTOMATICALLY INSERT ITEMS FROM drop-down menu, all items from the Adelaide desk from the last 12 hours will be added upon creation. After a Highlight List is created, all curation is done manually. If you want to create a Highlight List that is entirely curated manually, do not select any topic desk on creation. This Highlight List will then be available to all topic desks and those users with appropriate privileges will be able to add content to the Highlight List.

Groups

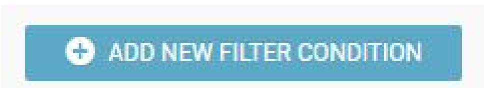
Group Management allows you to place users into specific groups such as Editorial Staff or Legal. More functionality around Groups is planned for the future.

Dictionaries

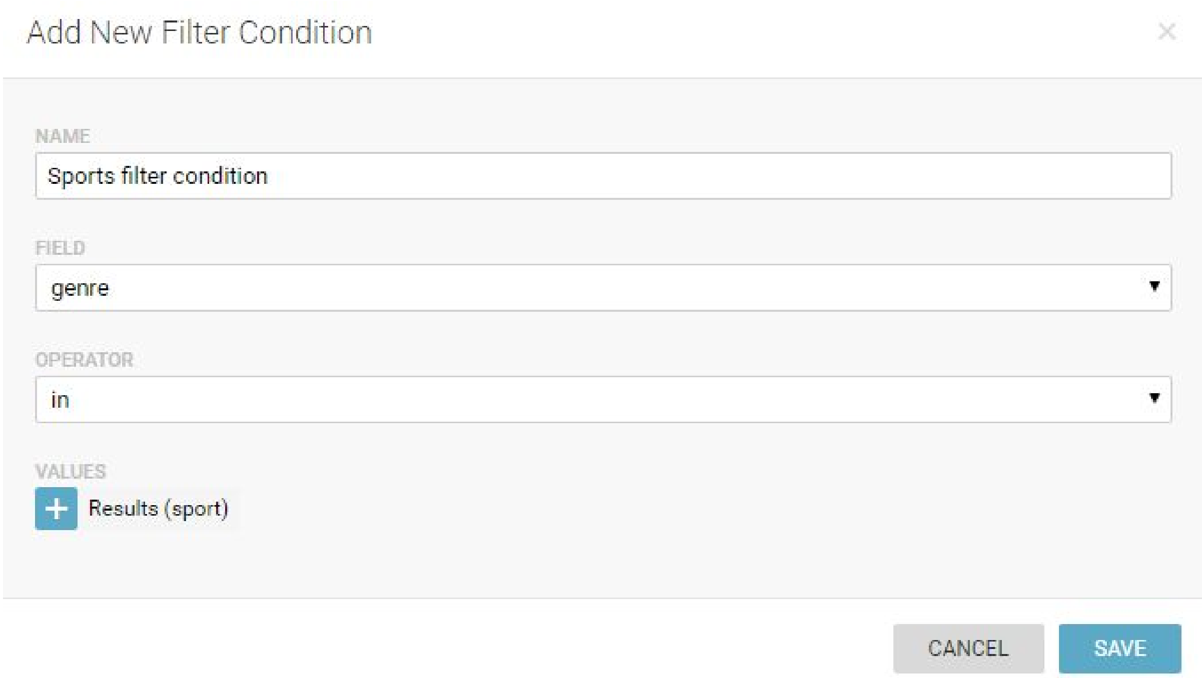
Dictionaries allow you to select what dictionary Superdesk will use for spellcheck. You can upload new dictionary files from here by clicking *ADD NEW DICTIONARY*. Dictionary files must be in txt format.

Content Filters

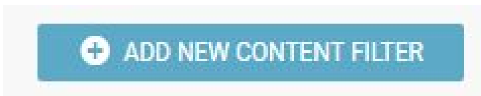
Content Filters allow you to create a series of criteria through which Superdesk can narrow down item groupings. This is useful for creating products, for example, as you can select one or more content filters to draw content into the product through These filters are created by building on other Content Filters or selecting new Filter conditions.



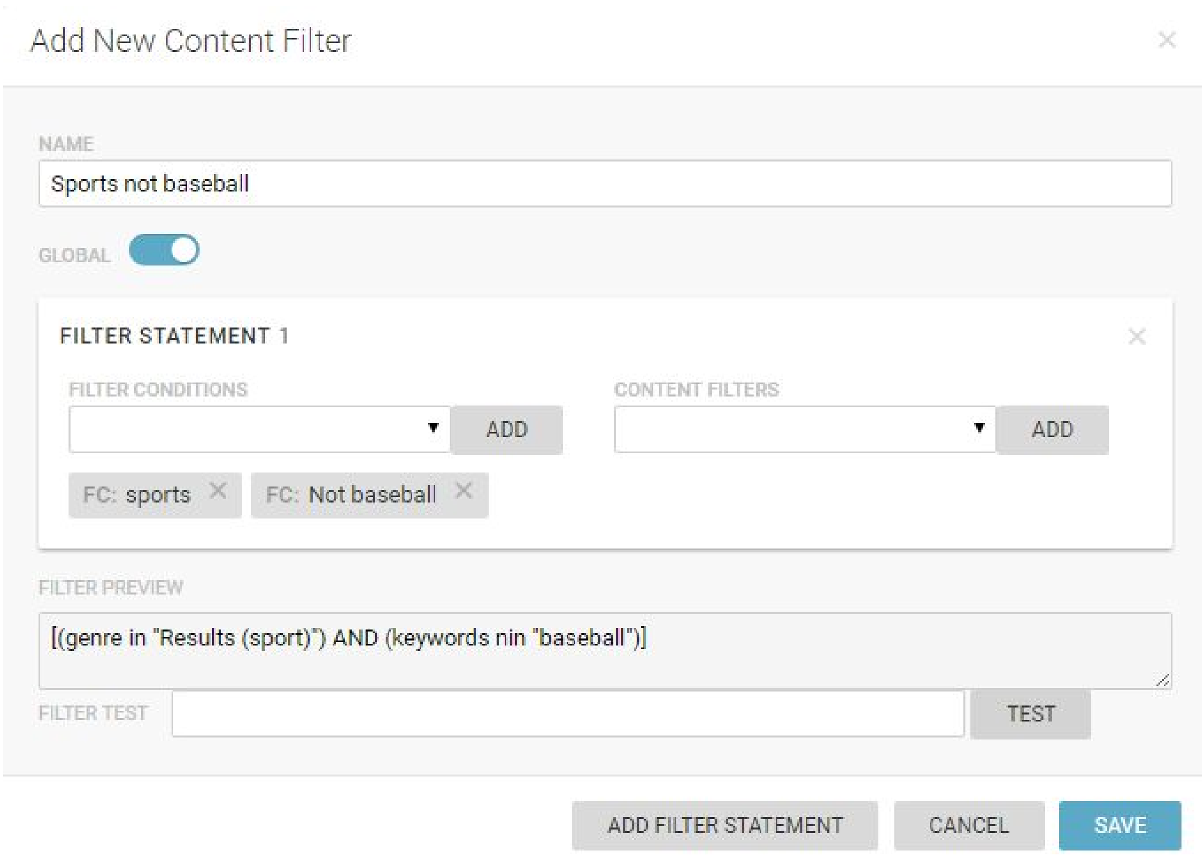
To create a new Filter Condition, click the *Filter Condition* tab along the top, then click *ADD NEW FILTER CONDITION* button in the top-right corner. A new window will open. The NAME field is for labelling your filter condition, using a descriptive name will help others understand what your filter does.



The Field dropdown allows you to select which part of the item to look at when filtering. In the above example, this filter condition looks for items that have the genre ‘sport’. The OPERATOR field includes both ‘in’ and ‘nin’, which are includes and does not include respectively.



To create a new Content Filter, click the FILTERS tab and then click *ADD NEW CONTENT FILTER* button in the top-right corner.



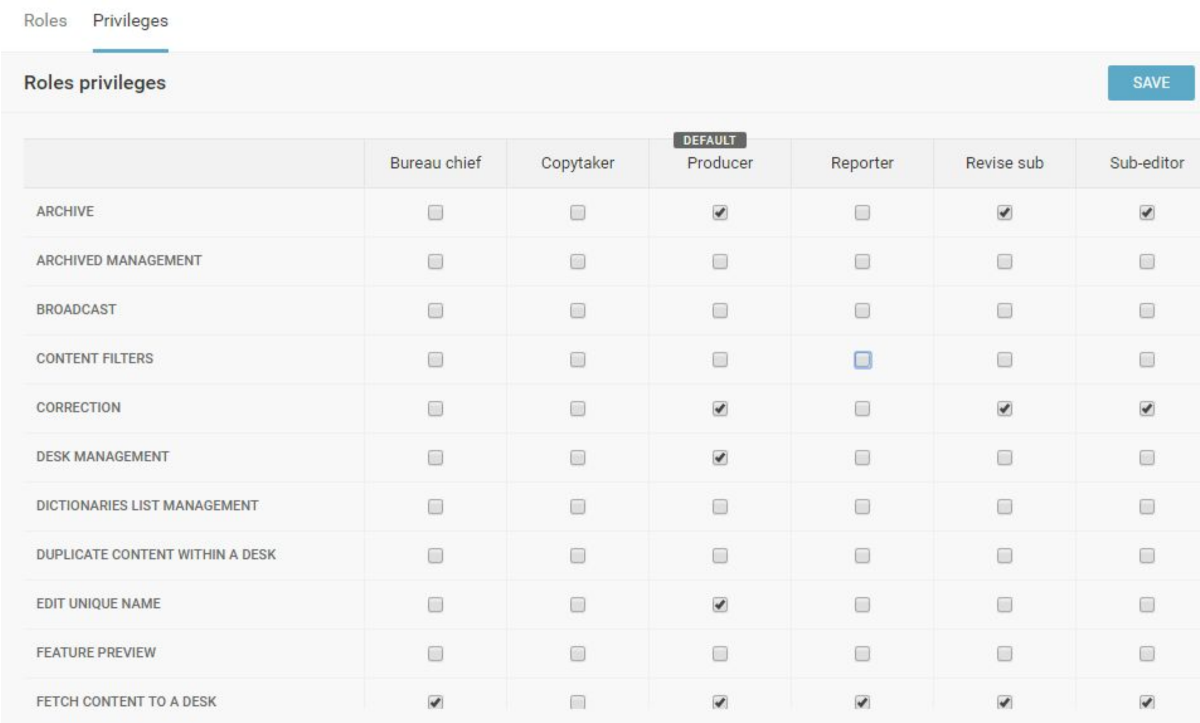
The GLOBAL setting toggle allows other users with access to Content Filters to see the filter you're creating. You can add other content filters to your current one and build upon those or add Filter Conditions. In the above example the content filter is set up to find items that have the genre 'sport' and does not include the keyword 'baseball', so all items that relate to sports, but not baseball. To test the filter, find an item that should pass your filter and an item that should not pass your filter. Put the article ID in the FILTER TEST field and click *TEST*. If the content filter works as intended, click the *SAVE* button.

Vocabularies

Vocabularies offer organizations a way to set up predefined options for fields, like genres or keywords. It is also where you are able to set up a global find-and-replace tool. More documentation about vocabularies is coming in the future.

User Roles

The User Roles function allows you to define the user types and permissions associated with each of those user types.



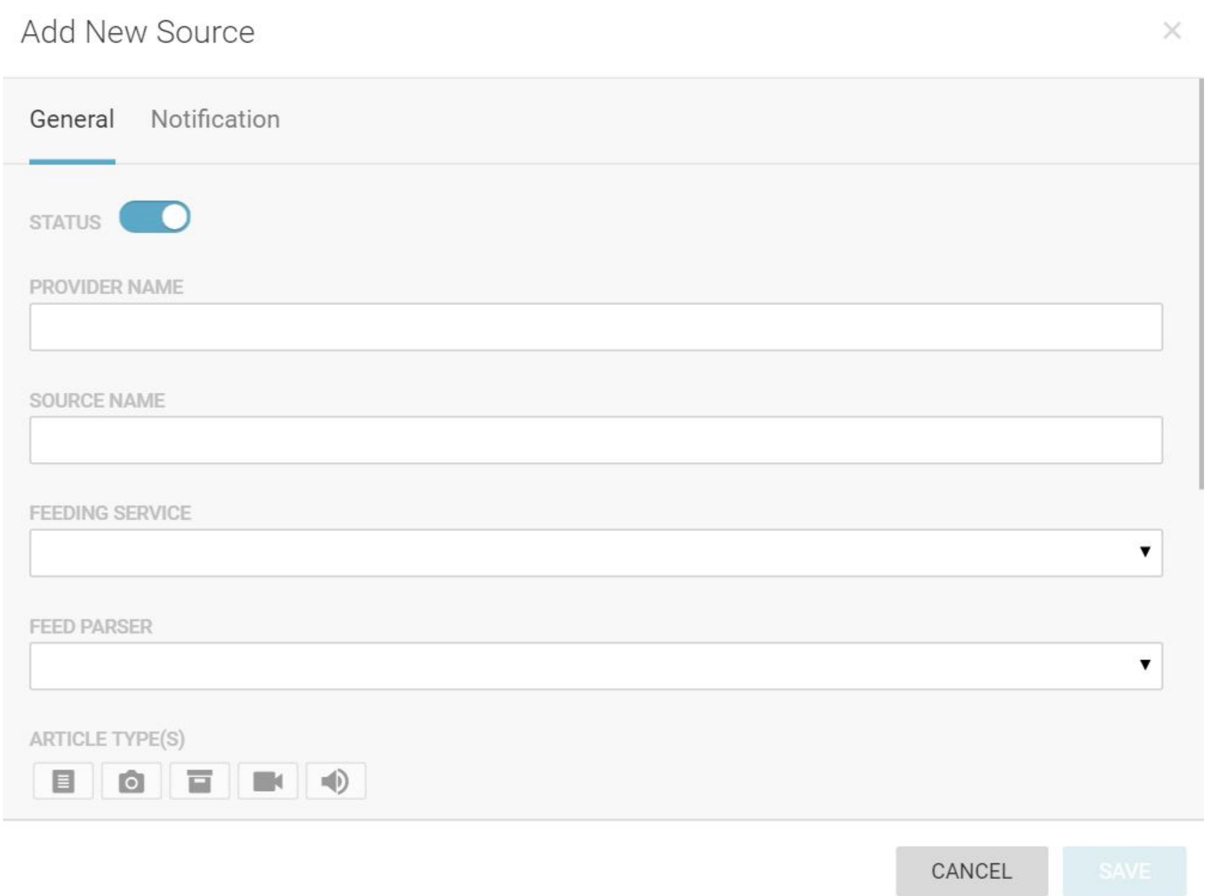
	Bureau chief	Copytaker	Producer	Reporter	Revise sub	Sub-editor
ARCHIVE			✓		✓	✓
ARCHIVED MANAGEMENT						
BROADCAST						
CONTENT FILTERS						
CORRECTION			✓		✓	✓
DESK MANAGEMENT			✓			
DICTIONARIES LIST MANAGEMENT						
DUPLICATE CONTENT WITHIN A DESK						
EDIT UNIQUE NAME			✓			
FEATURE PREVIEW						
FETCH CONTENT TO A DESK	✓		✓	✓	✓	✓

The User Roles menu where you will control what users have access to different functions within Superdesk on a large scale. Individual user privileges can also be edited from the User Management area of the Settings menu. From the Roles screen you'll be able to rename and change the description of each role within Superdesk. The Privileges screen allows you choose which roles are eligible for which privileges. Admin is missing from these pages because by default admins have all permissions and cannot be changed.

Ingest

Ingest is the way in which articles from other news sources arrive in Superdesk. This section of the Settings menu allows you to configure the sources of your external news content.

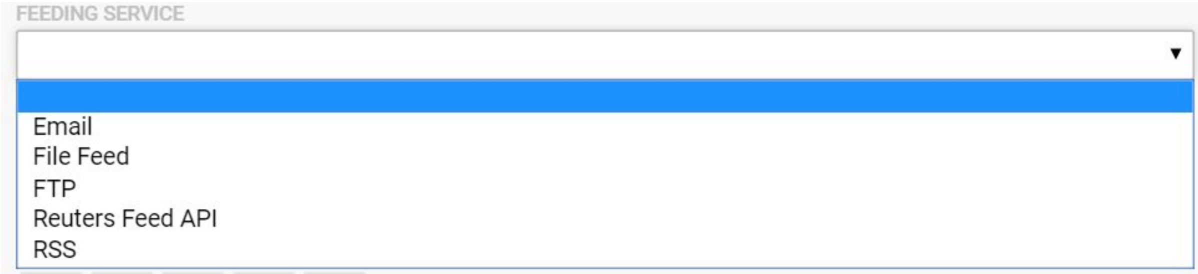
To let Superdesk know where to pull in new content from, you will use the Ingest area of the Settings menu.. To add a new source to ingest from, click *ADD NEW SOURCE* in the upper-right corner.



Status - Status can be set to open or closed. If the status is set to Open, Superdesk will ingest from this source, if it is closed, Superdesk will not ingest any further content from this source.

Provider Name - The name of the entity providing you with this feed. This is not used for any type of authentication and is only for labeling purposes inside Superdesk.

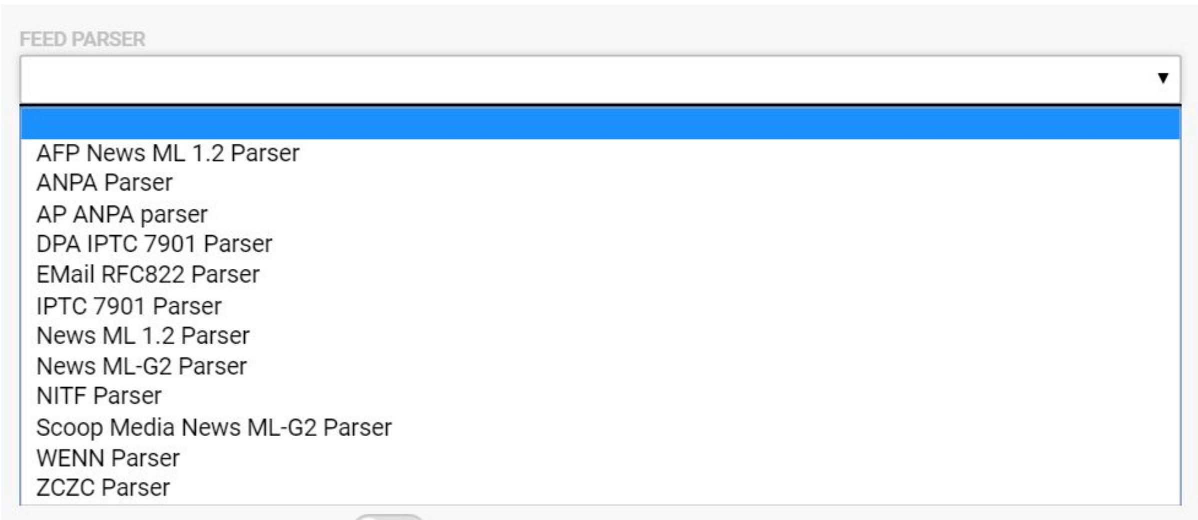
Source Name - Similar to provider name, but this is what any content ingested from this source will be tagged with this Source Name under the Source field in the article.



Feeding Service

- **Email** - Superdesk will ingest new messages received at the email address. You will then need to fill in login credentials for the email account you would like Superdesk to monitor.
- **File Feed** - Superdesk will monitor a file folder on the server Superdesk is installed on and ingest anything appropriate.
- **FTP** - Superdesk will monitor the FTP destination and ingest any content that is appropriate.
- **Reuters Feed API -** Superdesk will attempt to ingest the target if it is in Reuters Feed API format.
- **RSS -** Superdesk will ingest the content coming in from the RSS feed set up here.

Feed Parser



The Feed Parser field lets Superdesk know what format to expect the content to be in.

Article Types

The Article Types buttons enable you to select what type of content Superdesk will ingest from this feed. For example, you could set it to ingest only text articles and ignore picture items and composite items

Update Every

How often Superdesk will check this ingest source for new content.

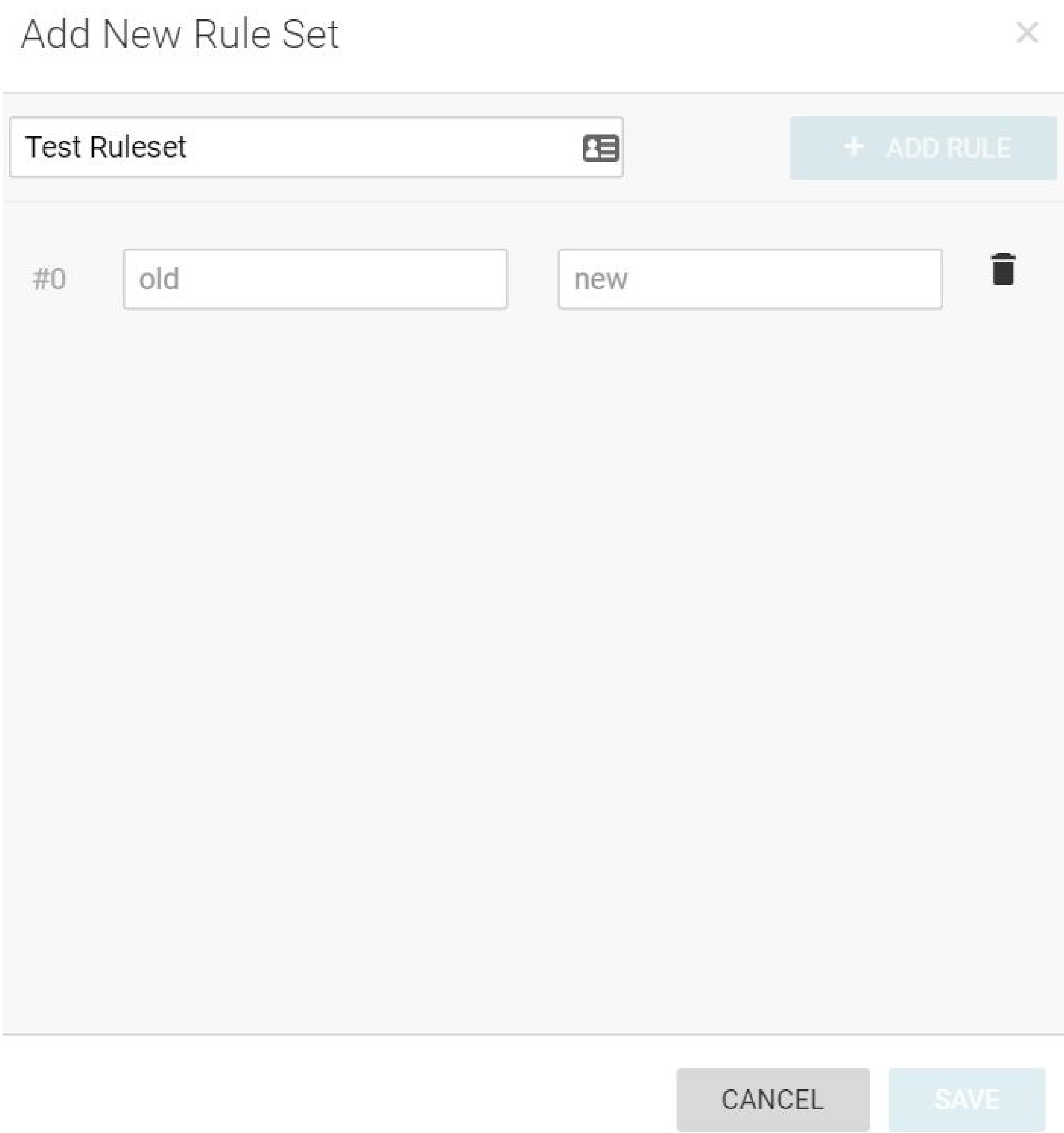
Notify When Idle for More Than
This setting will notify all users if the ingest source does not update with new content in the set amount of time. If you have email notifications enabled, you will also receive an email.

Content Expiry
Sets the amount of time after an article is ingested to move it to the archive. This is great for making sure your newsroom is only publishing the most current and relevant news.

Allow Remove Ingested Items
With this enabled, users with appropriate permissions are able to remove ingested items that haven't been fetched to a desk.

Rule Set
Choose which, if any Rule Set to apply to the items upon ingest. These Rule Sets allow Ingested articles to be modified between when they are sent out from the source and when they arrive in Superdesk.

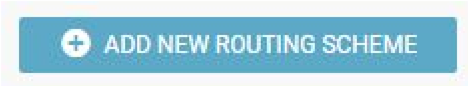
Adding new Rule Sets must be done from the Rule Set section found at the top of the Ingest settings page. Click the ADD NEW RULESET button in the top-right corner.



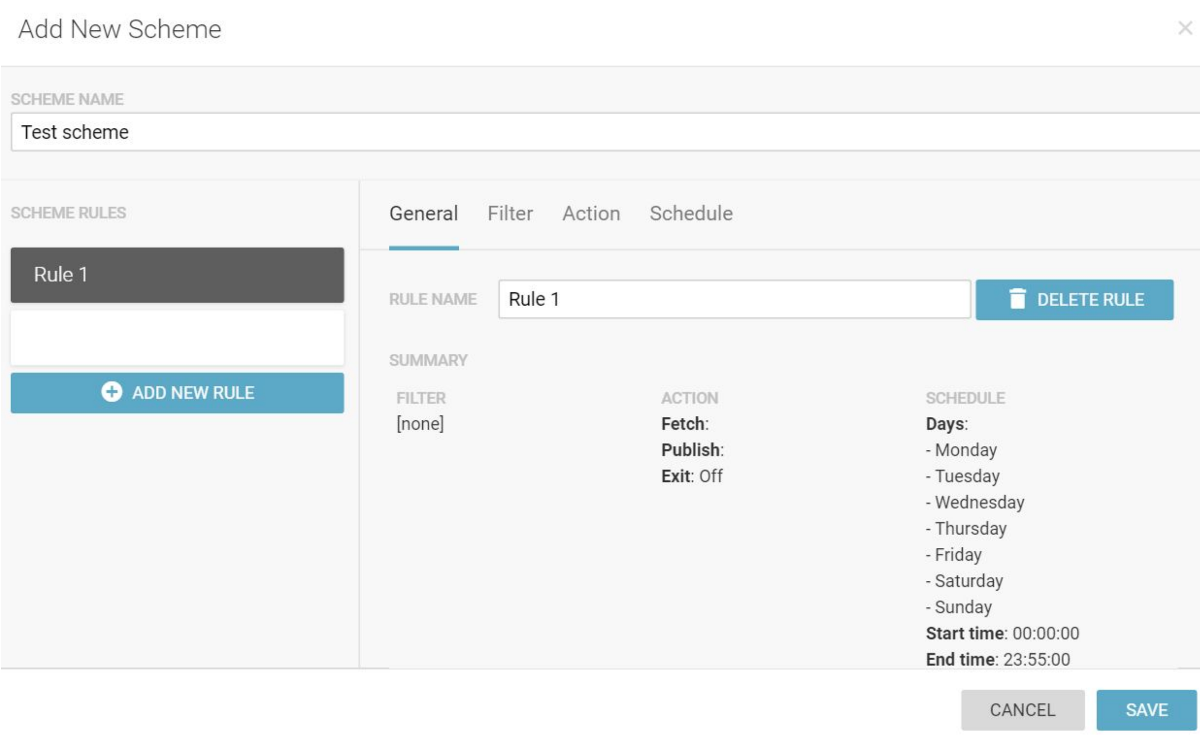
The first field allows you to name your ruleset. The old and new field are effectively 'find and replace' functions. Upon ingest, Superdesk will find any instance of the old word or phrase and replace it with what is inside the new field. You are able to set up multiple Rules inside a single Rule Set.

Routing Scheme

With routing scheme, you can tell Superdesk to fetch items to a specific desk, set the items to a specific stage, or even publish the items immediately after ingest.



Routing schemes must be created from the Routing Scheme page accessible through the *Routing* tab at the top of the Ingest settings page. To create a new Scheme, click *ADD NEW ROUTING SCHEME* button on the top-right corner of the Routing Scheme page.



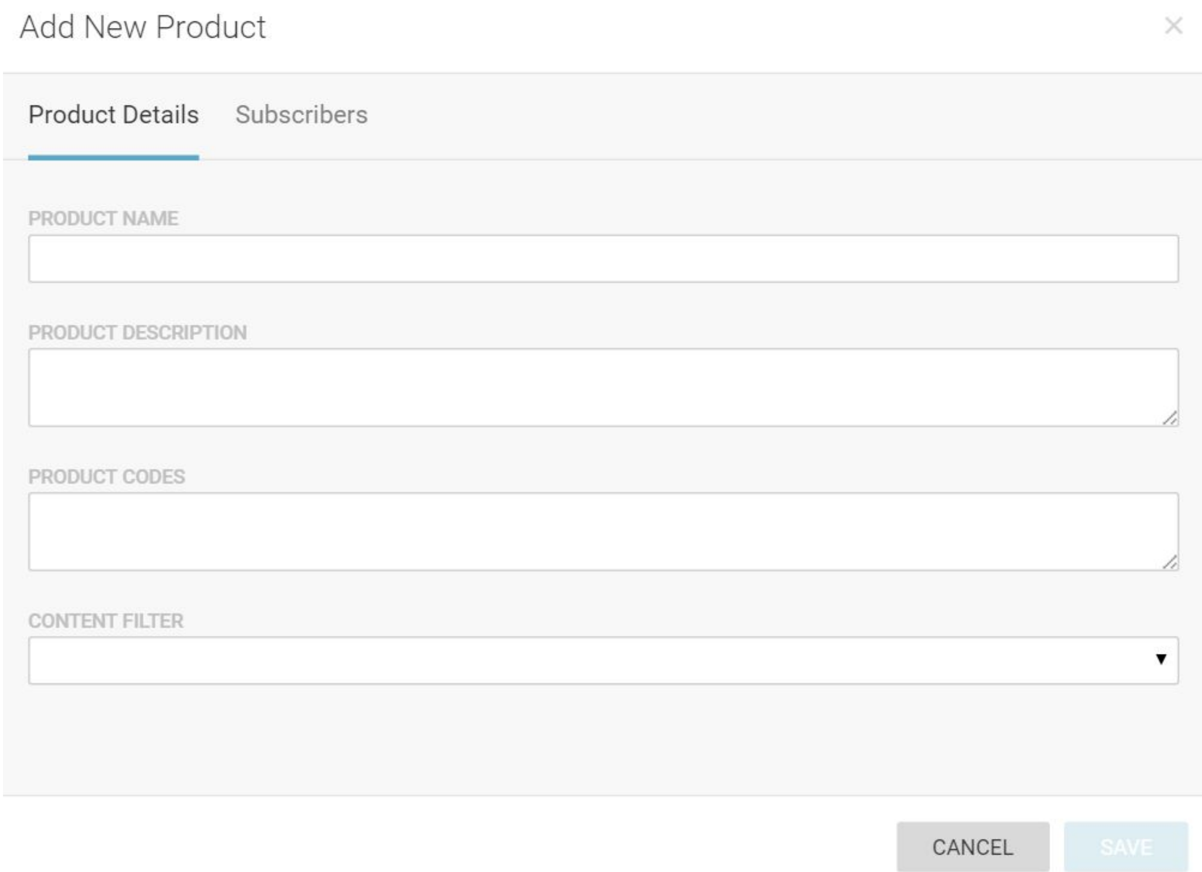
The RULE NAME field is where you'll name your routing rules. These rules are different from what's found in Rule Sets. The General tab also displays the current settings for the Rule. The Filter tab allows you to select what Content Filter to apply during ingest, this will let you decide which to items to you'd like to apply this routing scheme.

The Action tab dictates what will be done when an ingested article meets the content filters criteria. You are able to publish items at this point or fetch them to a desk. Setting up these schemes properly can save journalists a lot of time searching through the Ingest manually. The *Exit* setting will exit the routing scheme once once the criteria is met. The *Preserve Desk* switch, if enabled will not change the desk of an ingested article if it already has a destination desk set elsewhere. Schedule allows you to decide when this Routing Scheme is applied, an example would be if you have a specific desk for urgent news outside of office hours.

Products

Products are used to create groups of subscribers to receive specific content. From the Product Management page, you are able to edit, delete or create new Products.

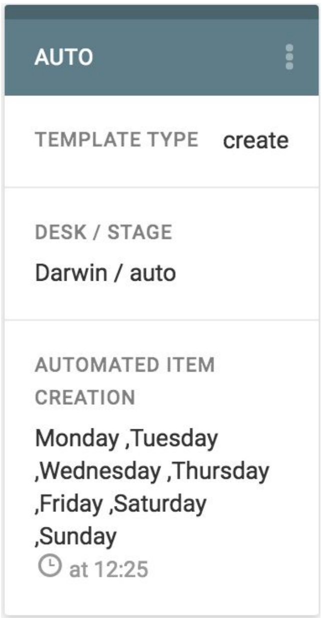
To add a new Product, click *ADD NEW PRODUCT* found in the upper-right corner of the Product settings window.



The PRODUCT NAME field allows you to name your product. PRODUCT DESCRIPTION the internal description of what the product is. PRODUCT CODES allow you to create short codes associated with the product, for internal use. The CONTENT FILTER is how you decide what content will be associate with the product. Whatever items meet the Content Filter criteria will be sent to all subscribers of the product when published.

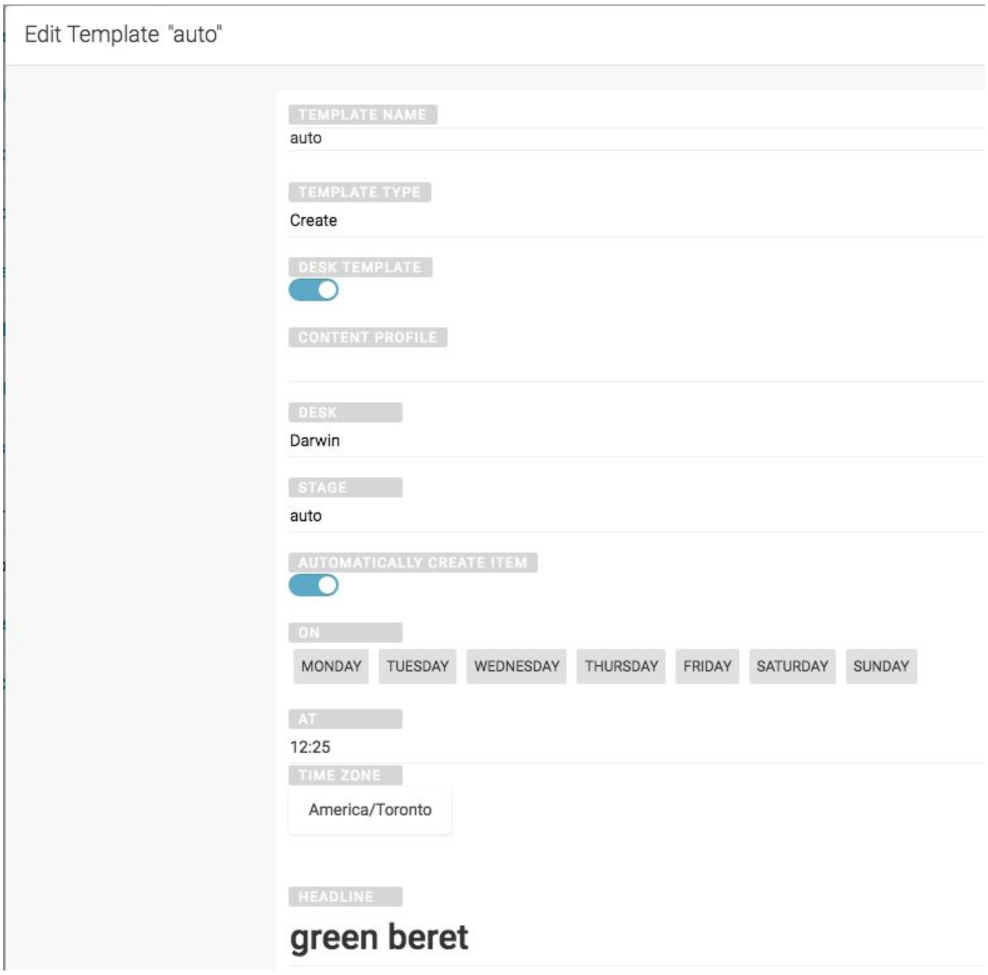
Templates

The Templates tab displays widgets with all current templates created by admin and other users. Templates can be used for many things within Superdesk. Templates can auto-generate articles, they can be the generic item kill notification sent to subscribers or they can be used to auto-format items in a Highlight List.



 This is the Template Action menu.

Each widget displays the template type, the topic desk and stage it's assigned to (if any) and its automated item creation schedule. All of these options can be adjusted by clicking on the template's Action Menu and selecting Edit.



Within the Edit Template window, you can enter or update any of the information in the textboxes, toggle on (blue) or off (grey) whether the template should be a Desk template or be automatically generated. When the latter is switched on, you can select which days of the week it should be generated, at what time and in which time zone.

Users can also add a Headline, Abstract, Byline, Dateline, Body text, Contact information and toggle on/off whether an SMS message should be generated. Note: the SMS feature is currently in development. At this time toggling the SMS feature on will only allow for the headline to be inherited into the SMS message.

Hit *SAVE* at the bottom-right corner of the window to save your changes before exiting the Edit Template window.

To create a new template, click the *ADD NEW TEMPLATE* button in the upper-right corner of the interface. The window that displays includes the same options as the Edit Template window. For the “Create” template types, there is an option to include a footer in the information entry.

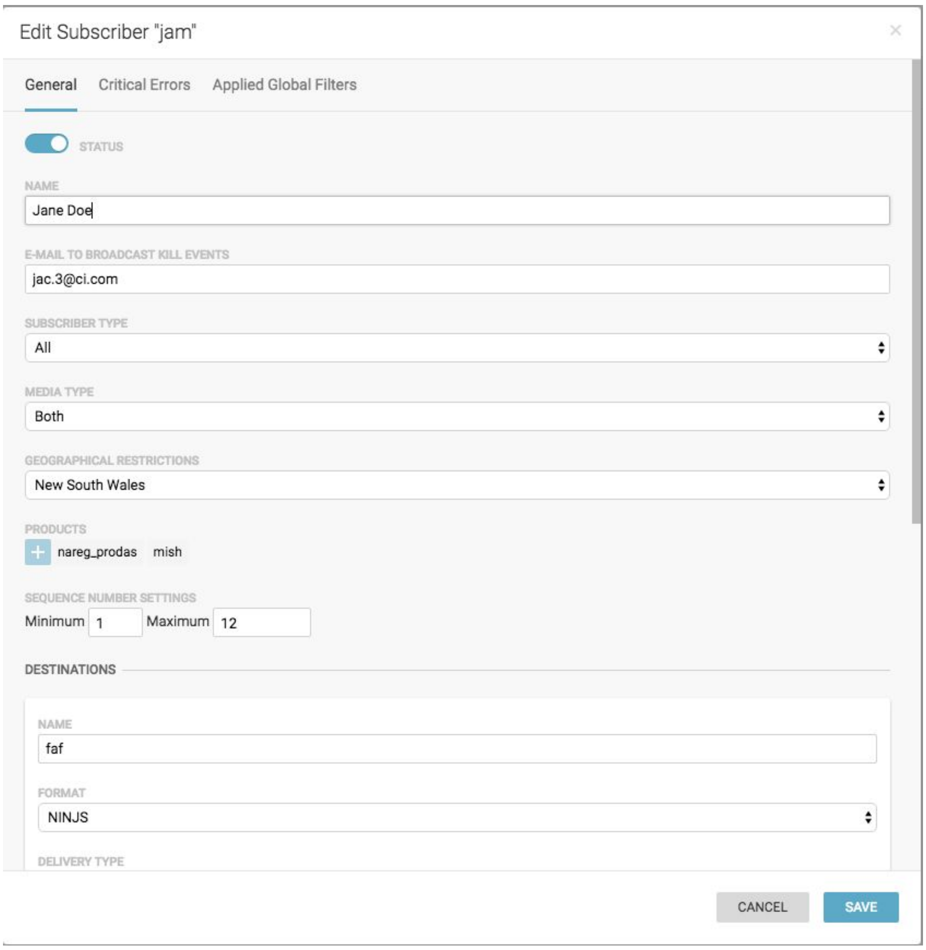
To delete a template, click the Action menu and select *Remove*.

Publish

The Publish tab displays the list of subscribers that published content is sent to. Inactive subscribers are marked “NOT ACTIVE.”

To update subscriber information, hover over their listing and click on the pencil icon that appears. In the Edit Subscriber window that opens, you can toggle their status on (blue) or off (grey) and edit information including their Name, Email address (which will be used to broadcast killed items), the subscriber and media type, and geographical restrictions (i.e. which geographical content the subscriber should receive). You can add products you would like the subscriber to receive by clicking the Add button under Products and typing the product name in the pop-up window.

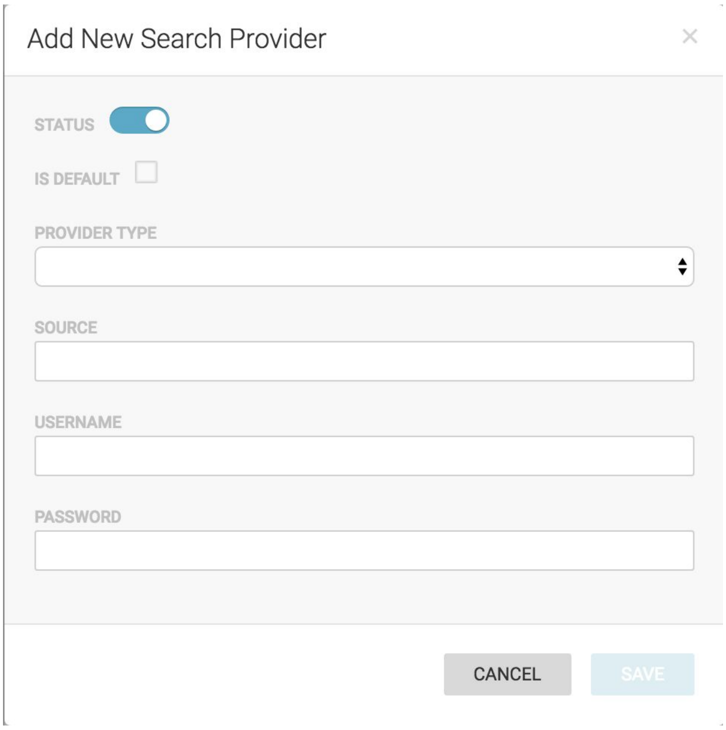
You can also set up multiple destinations, formats and delivery types (i.e. FTP, Email, etc.) for the subscriber to receive content.



Search Providers

The Search Providers tab enables administrators to set up external content providers for external image searches within Superdesk, for example.

Click the ADD NEW SEARCH PROVIDER button in the upper-right corner of the interface to add a new Search Provider.



The window that opens enables you to toggle the Search Provider on or off, select the provider type and enter the source name. The username and password credentials must also be entered in this window in order to configure the Search Provider functionality.