

Superdesk Manual

Version 1.33

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Foreword

Welcome to Superdesk. Much like the software itself, the documentation is undergoing constant revision. Screenshots may not represent the most current version and some functions may work differently to how they are explained. If you find inconsistencies, grammar issues, or have general feedback about the documentation, please email us at contact@sourcefabric.org.

For additional technical documentation, please refer here:

<https://superdesk.readthedocs.io/en/latest/>

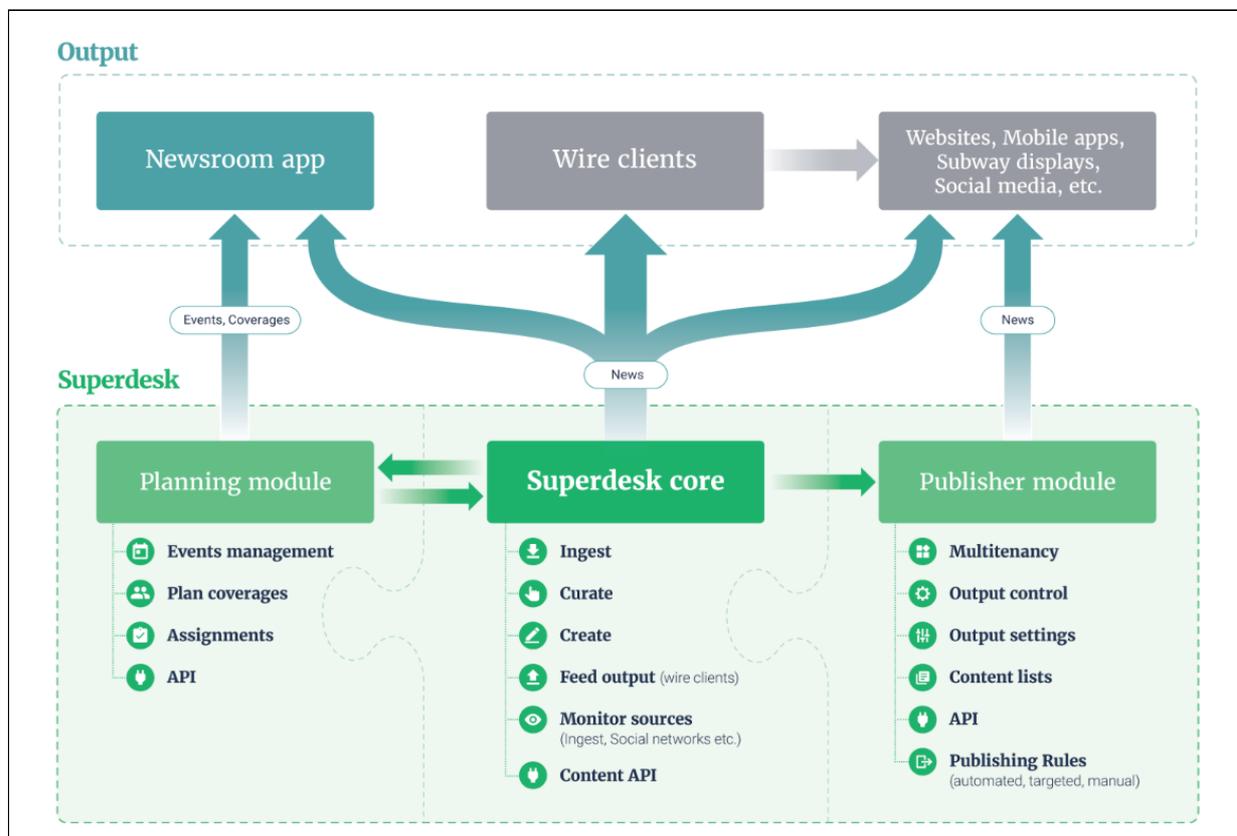
Further documentation can also be found on the Sourcefabric Wiki:

<https://wiki.sourcefabric.org/display/SDHOWTO/Superdesk+how-tos>

What is Superdesk?

Superdesk is a powerful, extensible, end-to-end news production and distribution platform. 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 enabling journalists to focus on creating and producing high-quality content. With Superdesk, all of the newsroom tasks are brought together in one platform. Superdesk makes publishing across multiple media outputs easy.

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



This manual covers the Superdesk core, and the optional Planning module. Superdesk can also be integrated with Superdesk Publisher. Superdesk Publisher delivers multimedia content through a variety of channels and it provides content management and monitoring from a single point of editorial control. Superdesk Publisher is not covered in this manual.

Before jumping into the main content of the Superdesk manual, we suggest that you familiarise yourself with our terminology guide: [GLOSSARY OF TERMS](#)

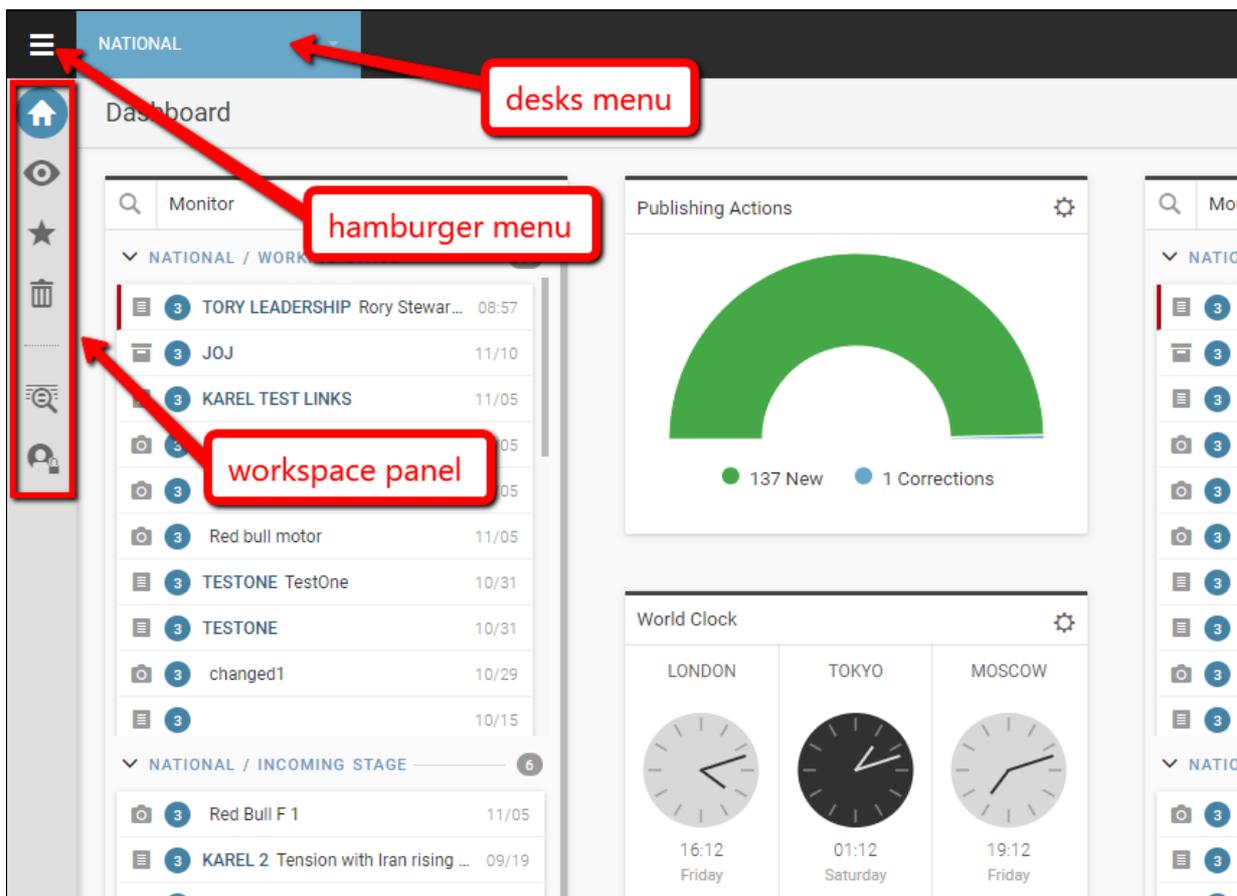
The Basics

In Superdesk:

- All users can search and read all content in Superdesk, except for individual Personal Spaces (and deliberately hidden Stages/Desks).
- Users can edit content in Desks they are a member of.
- Users can perform only the actions allowed by their role.
- Desks can be configured with two or more Stages to manage how content flows on the Desk.
- All Desks, all Stages, and all user roles are configurable. (This means that your individual instance of Superdesk might vary from the examples presented in this documentation.)

Superdesk Navigation

This section introduces the most important menus in Superdesk: The Desks menu, The Hamburger Menu and the Workspace Panel.

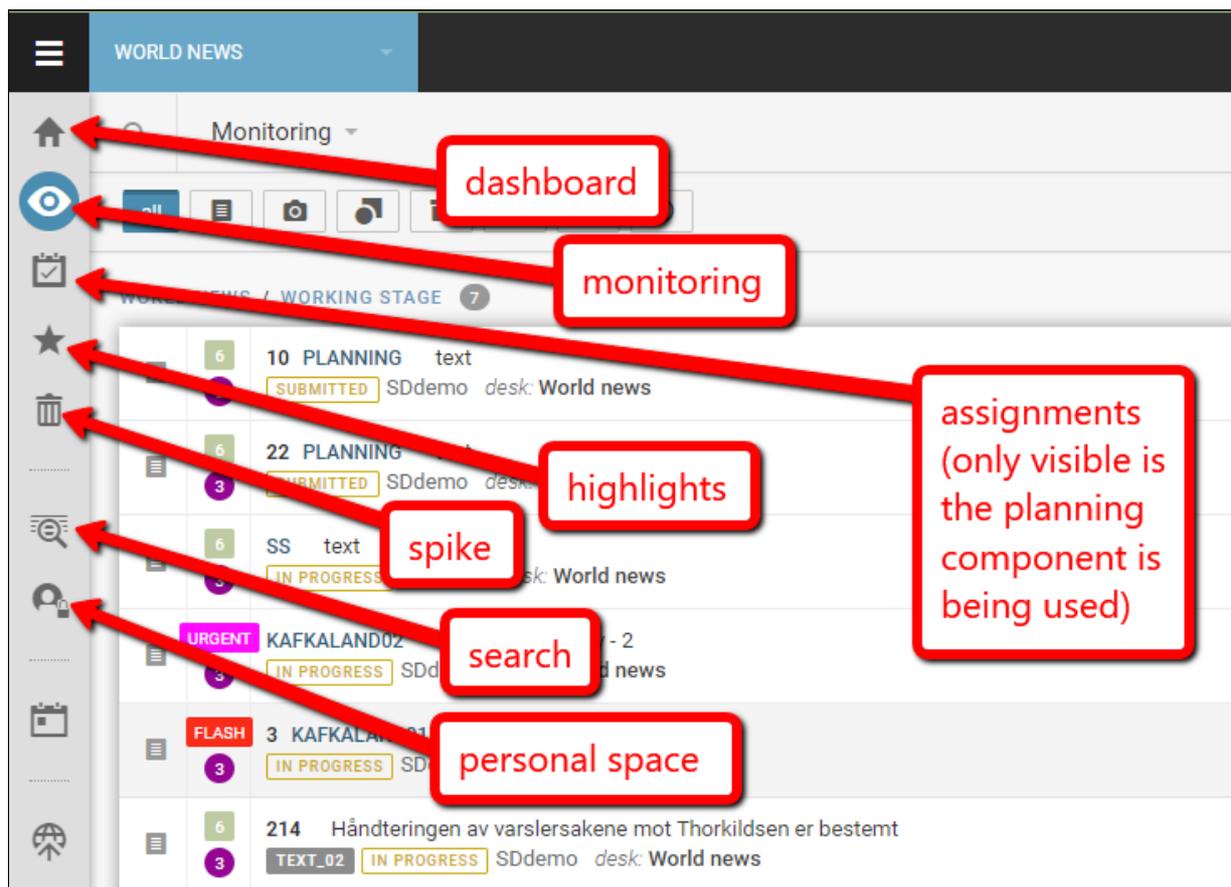


Desks Menu and Desk Switching

Desks are the way teams are organised within Superdesk. They can be similar to desks that would be found in a traditional newsroom; for example sports desks, foreign desks, editor’s desks, etc. Desks can be configured to contain different stages and assigned users.

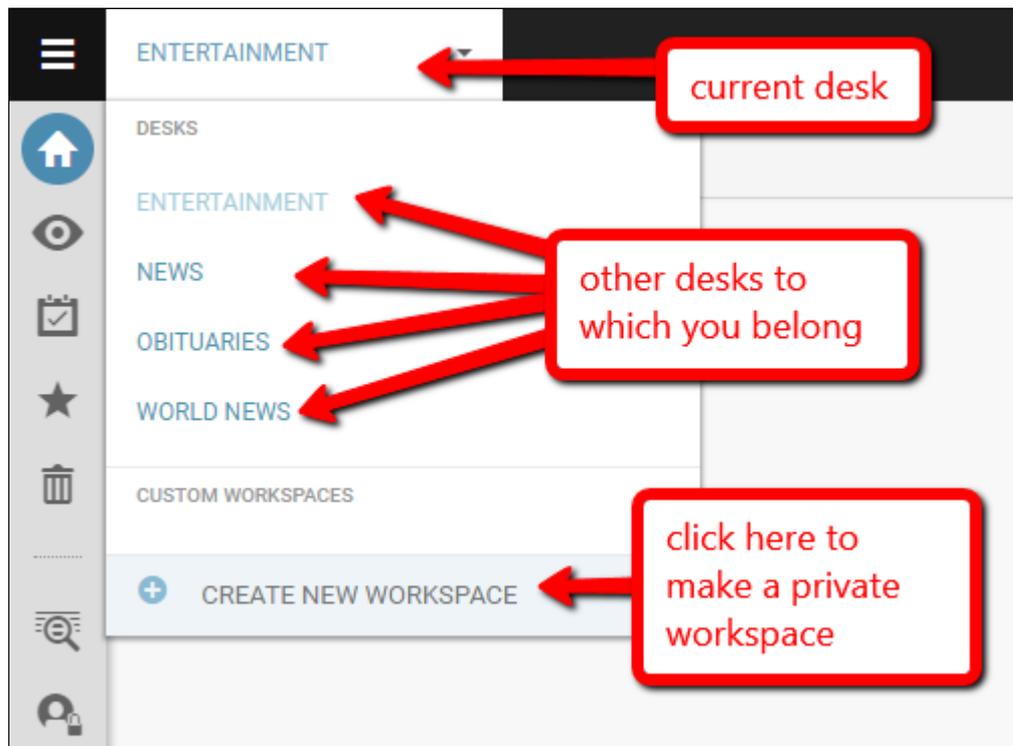
The **Desks menu** is the blue drop-down menu found at the top of the Superdesk interface, to the right of the Hamburger Menu icon. It always displays the name of the desk you are currently working on. Users can only view and edit articles on the desks to which they are assigned.

When you switch Desks using the Desks menu, the Dashboard tab, Monitoring tab, Highlights, and Spike will reflect the Desk that you have navigated to. The Search feature, on the other hand is Desk-independent. If you want to search only your current Desk, you can either use the Advanced Search features, or you can search keywords using the search bar at the top of the Monitoring pane. (All of the icons in the Workspace Panel are described in detail in this chapter.) The configuration of each Desk is controlled by the Desk administrator. They control which Widgets you see on the Dashboard and what appears in the Monitoring pane. Any changes made to the Desk Dashboard and Monitoring pane configuration will be visible to all users on that Desk.



Each user also has an option to create a private Custom Workspace within the Desks menu. In this menu, desks are in blue and Custom Workspaces are in purple.

Custom Workspaces are useful for working with multiple desks at one time. Upon creating a Custom Workspace, users can set up their own personal configuration for monitoring any number of desks, stages and saved searches. These can be displayed in their Custom Workspace Monitoring view or on their Custom Workspace Dashboard.



If you are assigned to more than one desk, you might be assigned a default desk in your user profile. This will affect which desk you are directed to when you log in. Depending on how your Superdesk is configured, logging into the system will take you to either your private workspace, to your most recently used Desk, or to whichever Desk is assigned as your default desk in your profile settings. Be sure to check which Desk you are directed to when you log in.

In the Monitoring tab, Desks are divided into Stages, which are areas set up to receive content, to organise it in workflow (for sub-editing, revision etc), and to display the desk's incoming and output content.

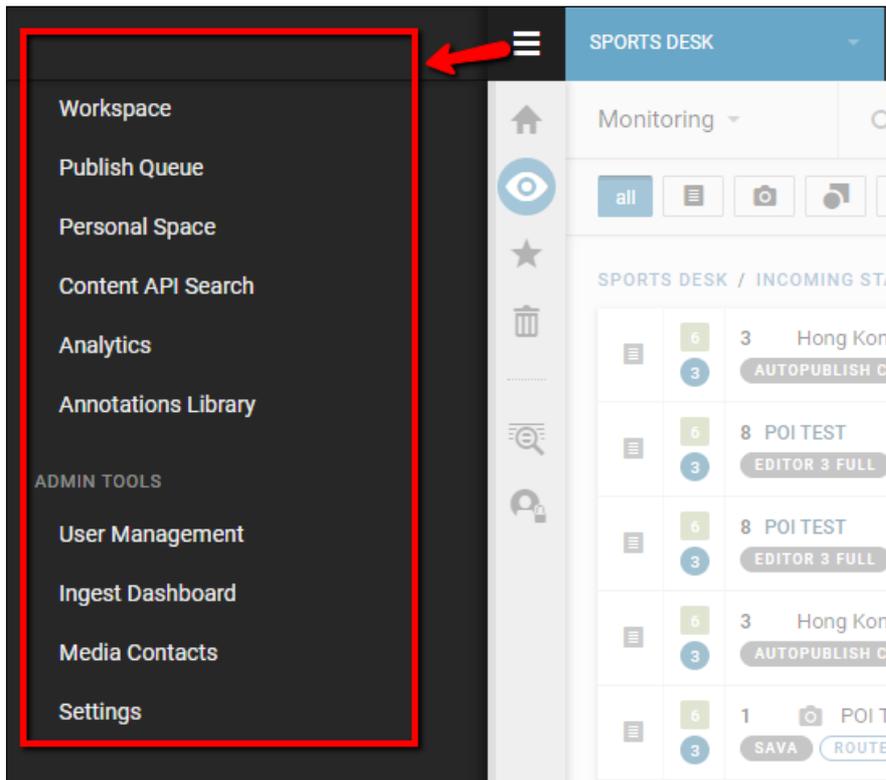
Hamburger Menu

The Hamburger Menu, in the top-left corner of the Superdesk interface, allows users with appropriate permissions to access the master settings for all the desks, users and news sources.



This is the Hamburger Menu icon.

Depending on your permissions, you will see different items in the Hamburger Menu. Below is an example of a typical items that you will see in a Hamburger Menu.



Clicking on the **Hamburger Menu** icon will open a new menu panel on the left of the Superdesk interface. This Hamburger Menu is also where you can access master desk settings, Ingest Sources, Dictionaries, Publishing Queue, etc. Each item in the Hamburger Menu is explained in detail in subsequent parts of this manual.

In general, most of the tools in the Hamburger Menu will be accessible only to users with administrative privileges.

To exit the Hamburger Menu, click on the *Workspace* link at the top of the menu, or click on any of the icons in the Workspace Panel to the right of the Hamburger Menu.

Workspace Panel

Below the Hamburger Menu icon is the Workspace Panel which allows you to navigate within the currently selected desk (as denoted by the title displayed on the Desks menu). You will see a column of various blue and white icons:



Dashboard - The Dashboard provides an overview of the current desk (or Custom Workspace) through widgets selected by the desk manager: monitoring, activity stream, ingest stats, world clocks, routing etc.



Monitoring - This is the main tab for item creation and workflow monitoring. It can be configured by a desk manager to show any number of Stages for the selected desk as well as Saved Searches, with a desk-specific search available at the top. New news items can be created using the Create icon in the top right corner of this panel.



Assignments - If the Superdesk Planning Component is installed, you may see this icon in your Workspace Panel. Track your assigned tasks here.



Highlights - Highlights are most commonly used for content indexes, top-10 lists, section highlights and all manner of user-curated lists. Highlights can also be generated automatically against user-defined metadata, manually curated or scheduled for publication/distribution. Highlight lists can be easily turned into a Package. All users can view the Highlight list, but only users with appropriate permissions may add news items to a Highlight list.



Spike - Shows news items that have been removed from the workflow of the selected desk. Spiked news items can be returned to the desk workflow if necessary. News items that expire are not sent to the Spike, but rather deleted permanently.



Personal Space - Private space for creating items that cannot be viewed by other users. Items created here can be sent to other desks when they are ready to be reviewed by your peers. Items in personal space cannot be seen by your fellow desk members, desk managers, or desk admins, and your content is invisible to any Superdesk search. Do not leave content here that is needed in workflow/production. Your Personal Space can also be accessed from the Hamburger menu.



Search - Allows you to search and browse articles in Superdesk's internal repository, third-party content feeds (or any other content repository Superdesk is aware of). You can also create Saved Searches from this tab.

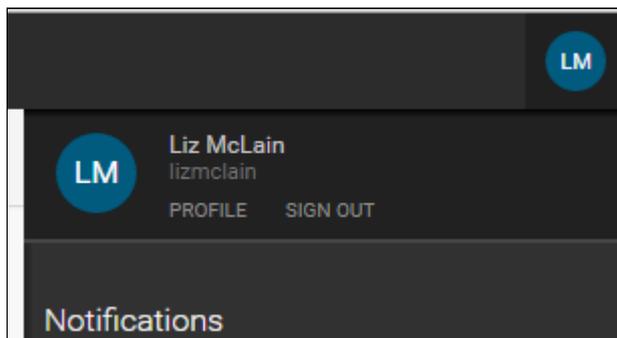
Superdesk behaviours and icons

User icon

In the top-right section of the Superdesk interface you'll find your user icon.



By default, your user icon will show a blue circle with your initials, but this can be changed to an avatar of your choosing in your profile settings. Clicking on your user icon gives you the option to log out of Superdesk, or to edit your user profile.



Click Profile, under your username to change your profile picture, input contact information, set personal preferences and change your Superdesk login password. To close the User panel, click on your user icon a second time.

Create icon



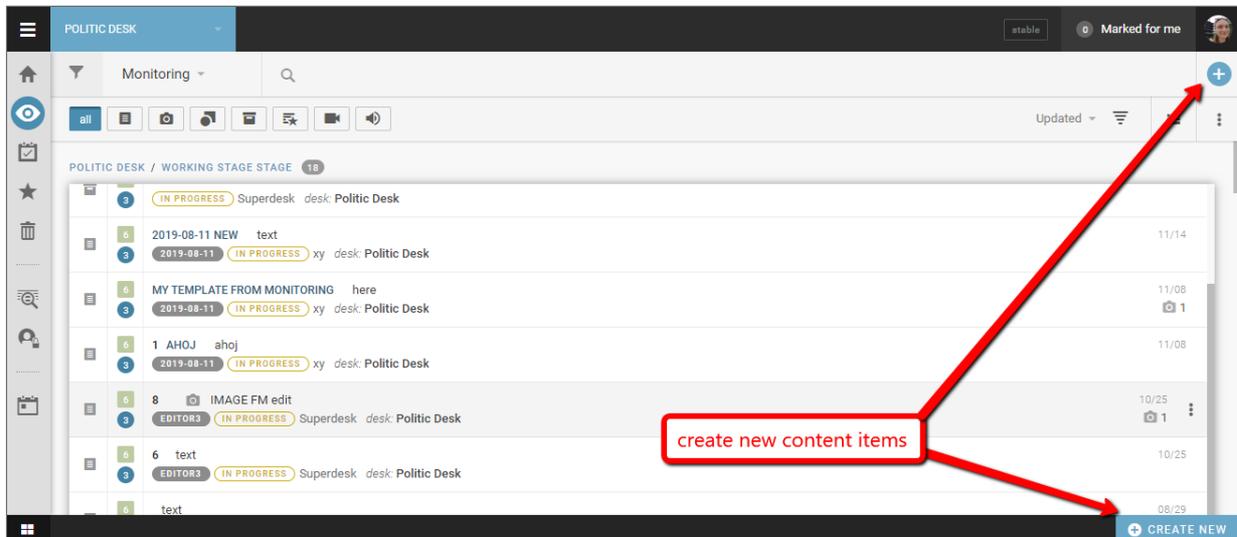
This is the Create icon.

In the Superdesk main interface, you will find the blue Create icon. It will usually be in the top-right below your user icon. The function of the Create icon will vary depending on which panel you have navigated to.

On your Dashboard, the Create icon will allow you to add widgets to your desk or Custom Workspace Dashboard.

In the Monitoring tab, the Create icon allows you to make new articles, new packages, or to upload items from your personal computer to Superdesk. As of Superdesk v1.33, the option to

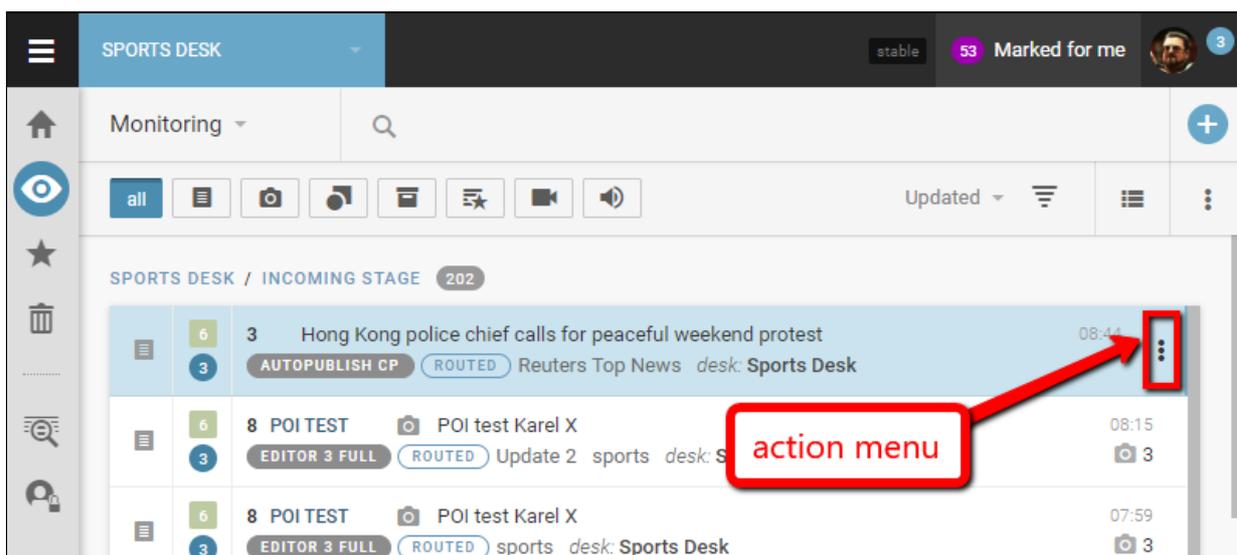
create items is available in the bottom right corner of the Superdesk interface, regardless of which pane you are in (excluding the planning component).



You will also sometimes find the Create icon in the various parts of the Hamburger Menu, where the uses may vary. In general, the use of the Create icon is context-dependent.

Action menus

You will find action menus in various parts of Superdesk. Below is an example of an action menu in the Monitoring view. In the Monitoring pane, the action menu will appear when you mouse-over any of the news items in the pane.



In the Monitoring view, clicking on an action menu to an item's right will bring up a list of actions that you can affect on it. The actions available will depend on your role, permissions, and whether the item is already opened by other users.

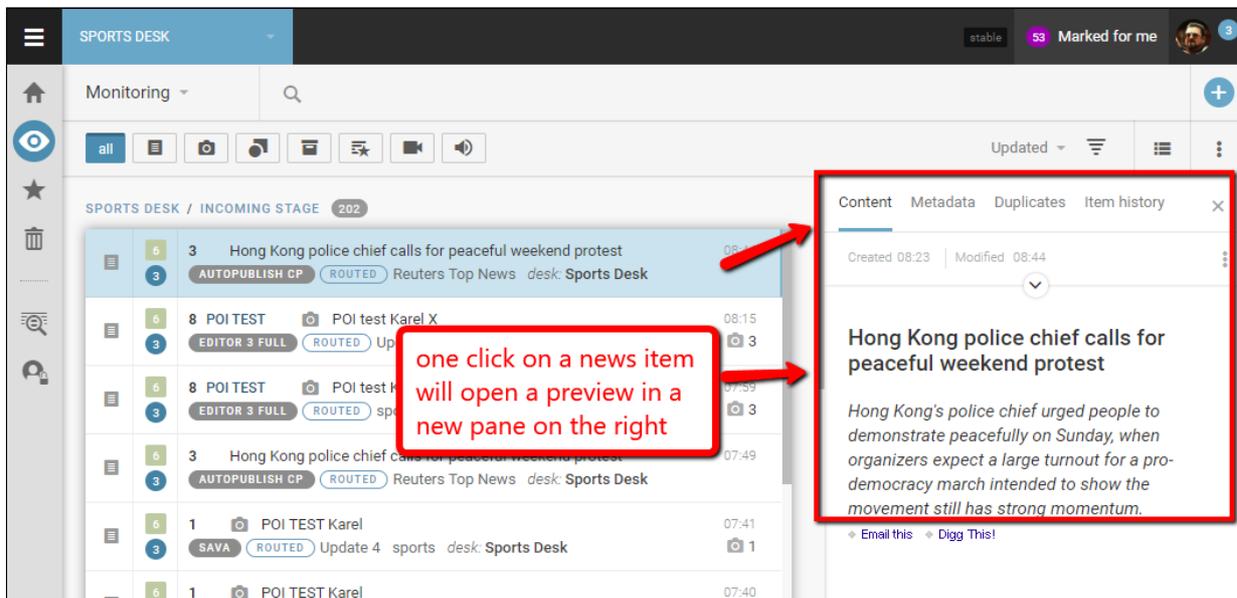


These are action menus.

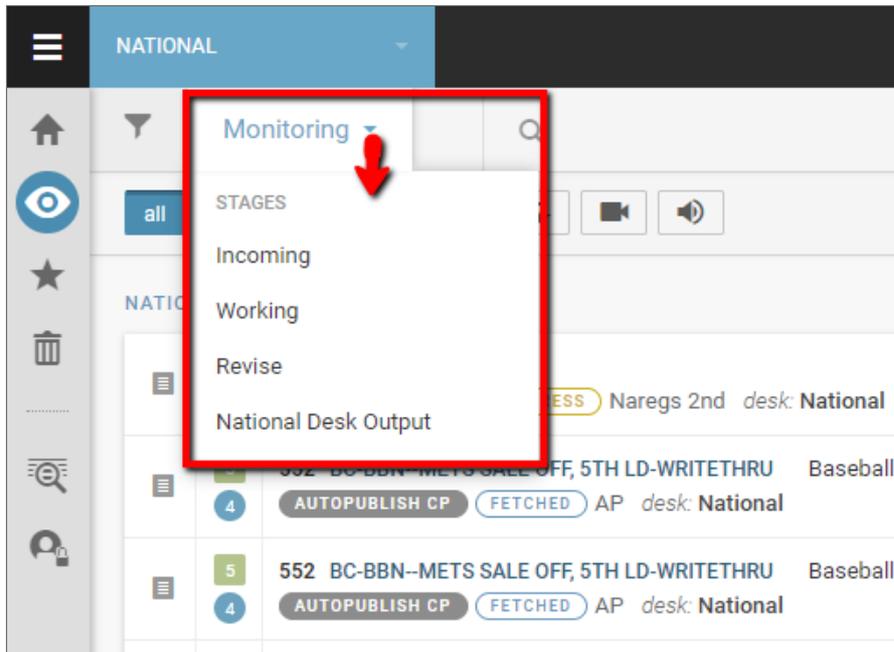
You will also find action menus in other various locations throughout the Superdesk interface, for example, in the Content Profile settings, master desk settings, etc. The actions available in each action menu will be context dependent.

Basic controls in the Monitoring view

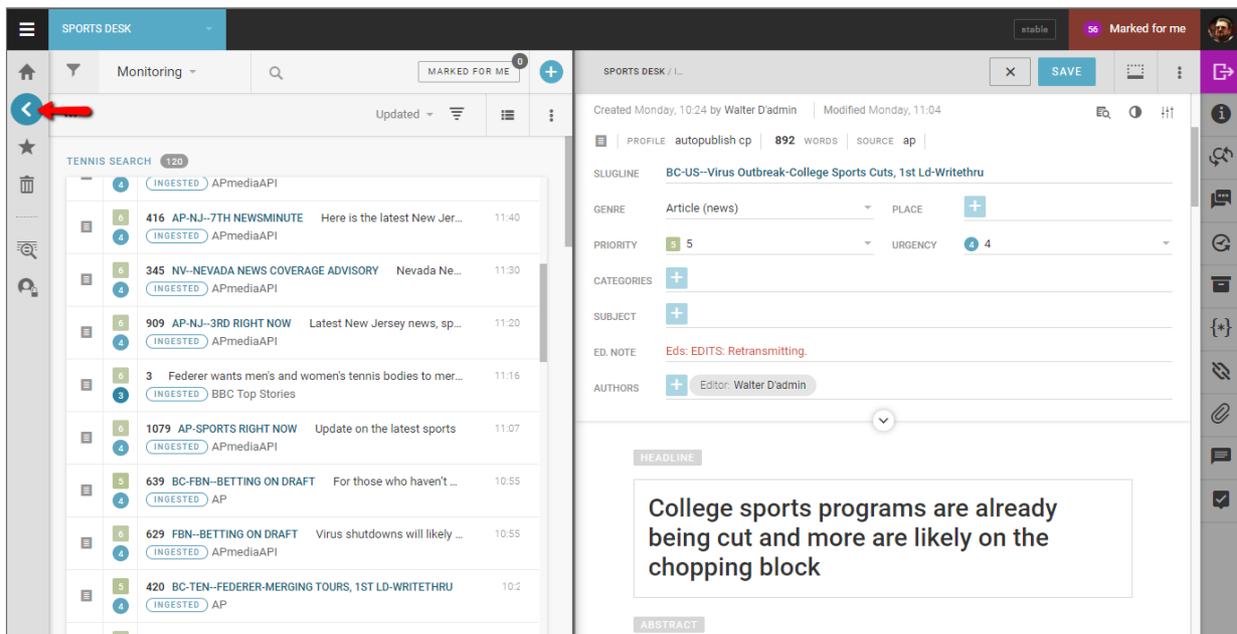
The Monitoring view is where most of your news items are created or edited. Clicking on a news item *once*, will open a preview of the article on the right. *Double-clicking* on an article in the Monitoring view will open the article for editing in a pane on the right. New content items can be created using the Create icon in the top right corner of the pane.



You can filter the Monitoring pane to show specific stages using the drop-down menu at the top of the pane:



The list view in the Monitoring pane can be hidden using the the chevrons that appear as you mouse over the Workspace Panel when an item is open for editing. This allows users to have news items that are open for editing front and center in the user’s focus.



Similarly, the list view can be expanded again by clicking the chevron to return the list to its original position. This action can only be used when news items are open for editing.



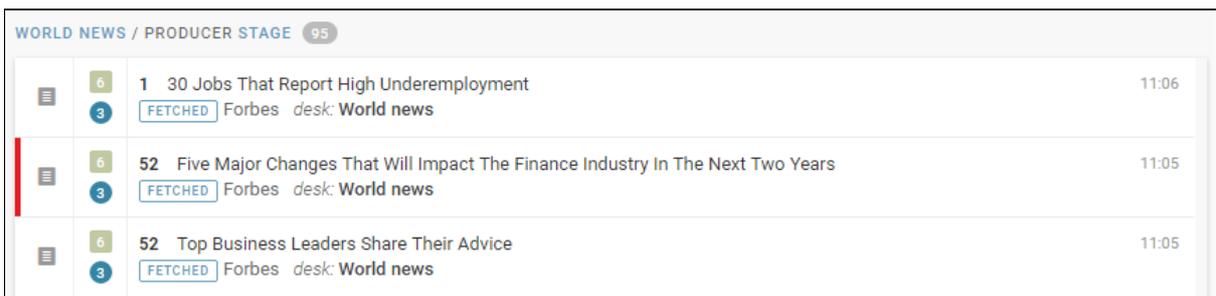
Workspace Bar



At the bottom of the Superdesk interface you'll find your Workspace Bar where you can navigate between items you're currently working on. An item will remain open until you close it. If you navigate away from the article that you are editing (without closing it) it will automatically minimise to the Workspace Bar and it will be locked to other users.

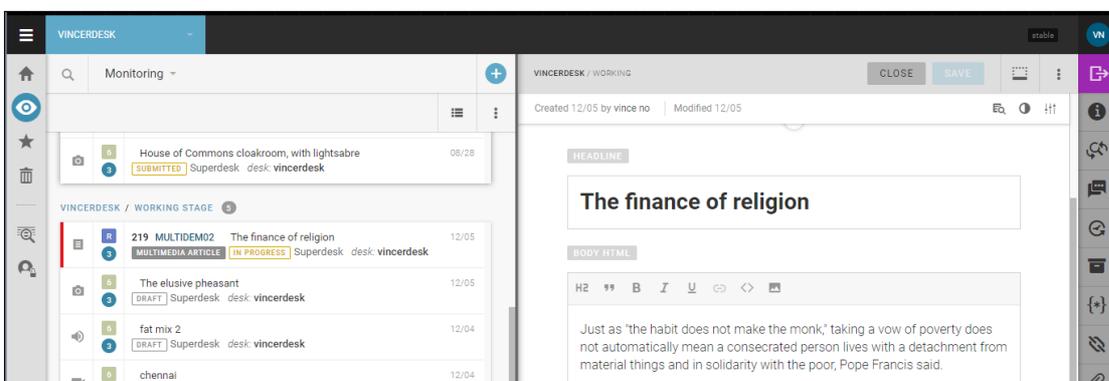
Locked Items

Items that are opened by one user become locked from other users until they are closed, or unlocked by a desk manager. Locked articles cannot be opened or edited by other users unless they are manually unlocked by a person with "unlock" permissions; this would usually be a senior producer or similar. The article's locked status is denoted by a vertical red stripe that appears beside it in the monitoring pane.

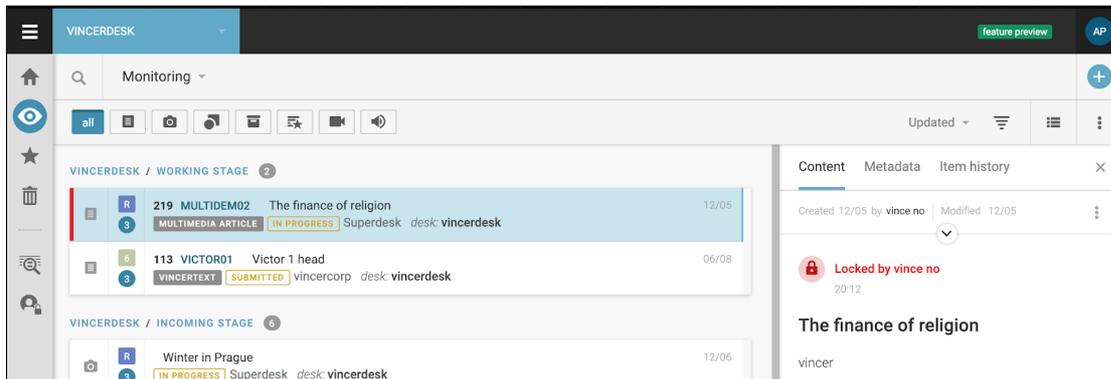


However, even if an article is locked, the article preview is available for other users to see, even if the option to edit the article is not.

In the screenshot below, a user is working on an item in the right-hand panel. Notice in the list view on the left that the item is marked on its left border with a red line. This is the lock indicator in that view.

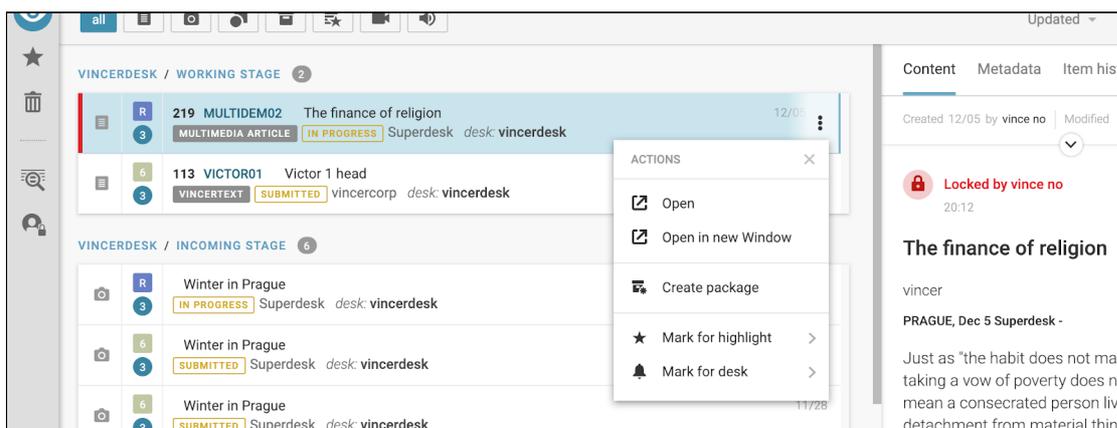


But another user looking at this item while it is being edited will also see a lock notice at the top of the item in preview:



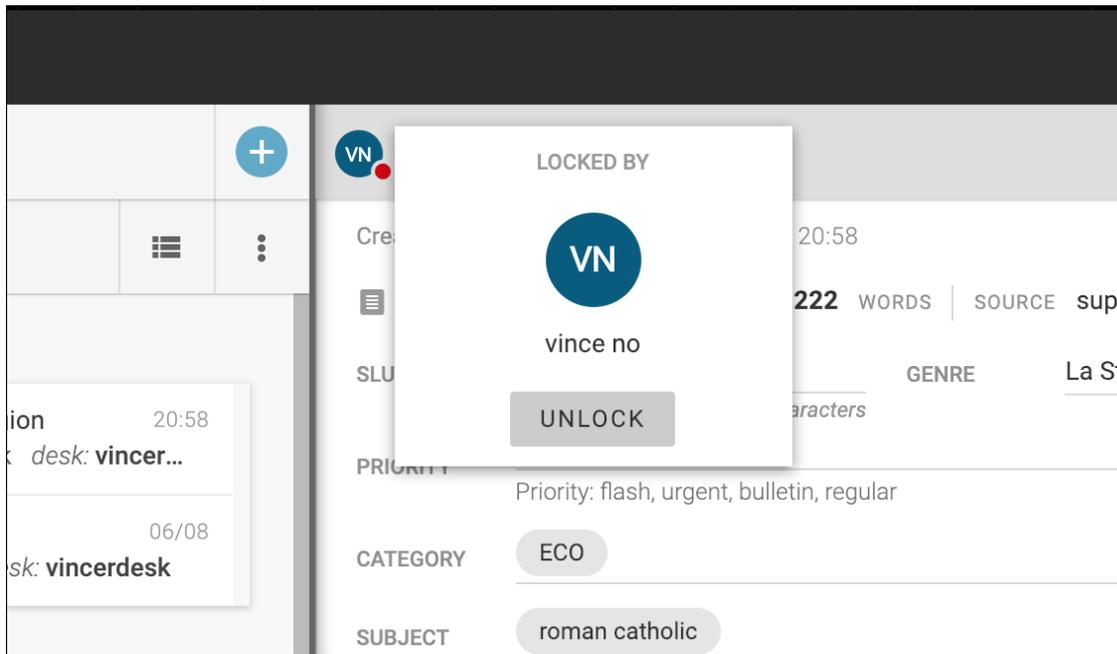
The lock notice also says who has the document open for editing, whether they are actually actively editing or not.

If another user clicks the action menu against the item, there are options to “open”, but not to edit:

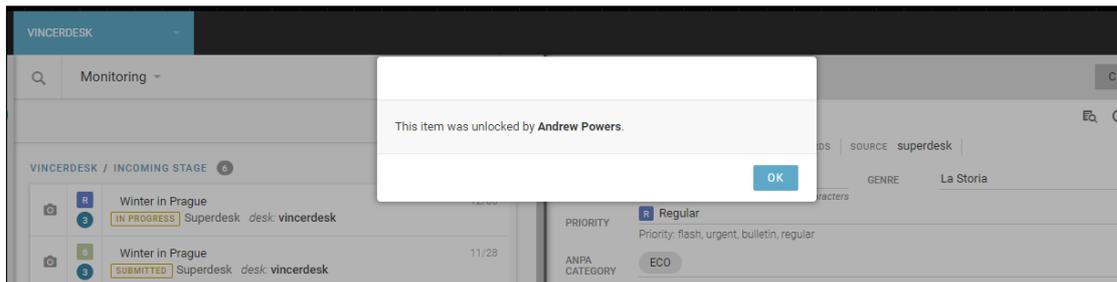


If we choose to open the item from the action menu, we’ll see it in a larger panel, but it will not be editable. Also, in the grey strip at the top of the item, the avatar of the user with the item open for editing (the user with the lock) will be on the left, displaying a red badge.

A user with sufficient privileges can unlock the item by clicking on the avatar of the user with the lock; this will trigger a little window with an unlock button:

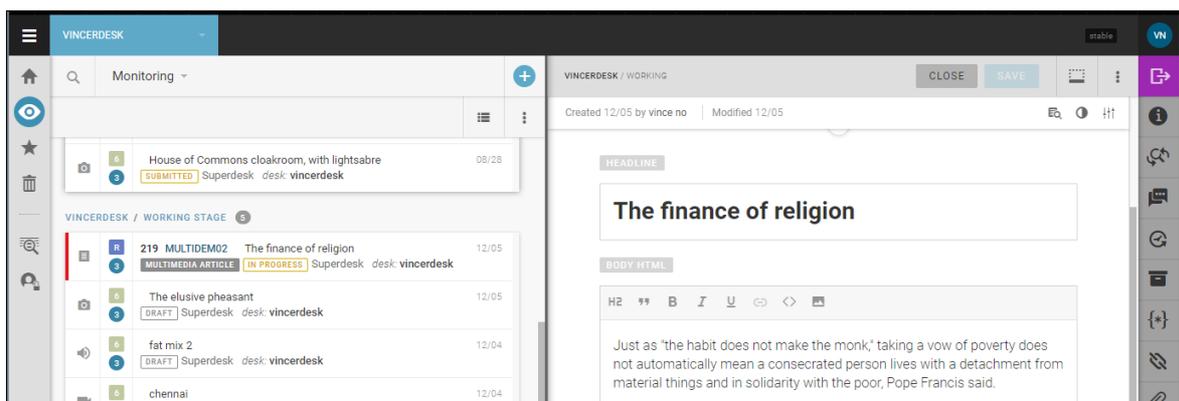


The usurped user will be informed via a pop-up message that the item has been unlocked:

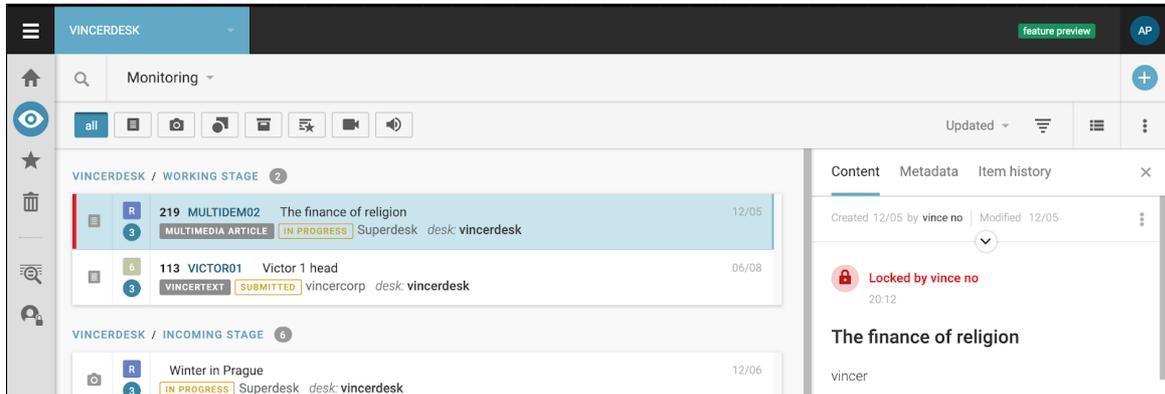


When a Superdesk user opens a news item for editing, that article is locked to any other users until the item is closed. However, the article preview is available for other users to see.

Here is a user working on an item in the right-hand pane. Notice in the list view on the left that the item is marked on its left border with a red line. This is the lock indicator in that view.

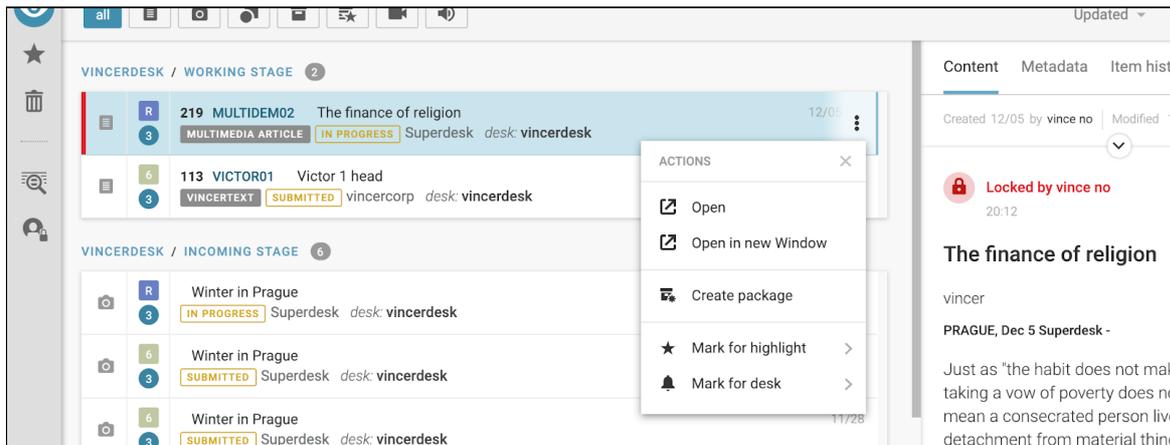


But another user looking at this item while it is being edited will also see a lock notice at the top of the item in preview:

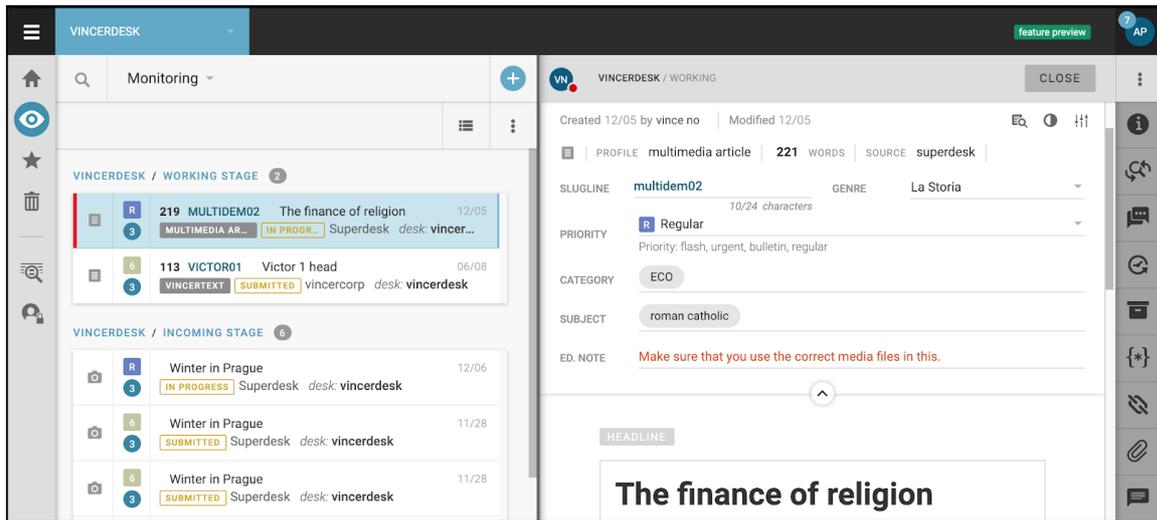


The lock notice at the top of the article preview also denotes which user is currently editing the document - or who has the document open for editing, whether they are actually actively editing or not.

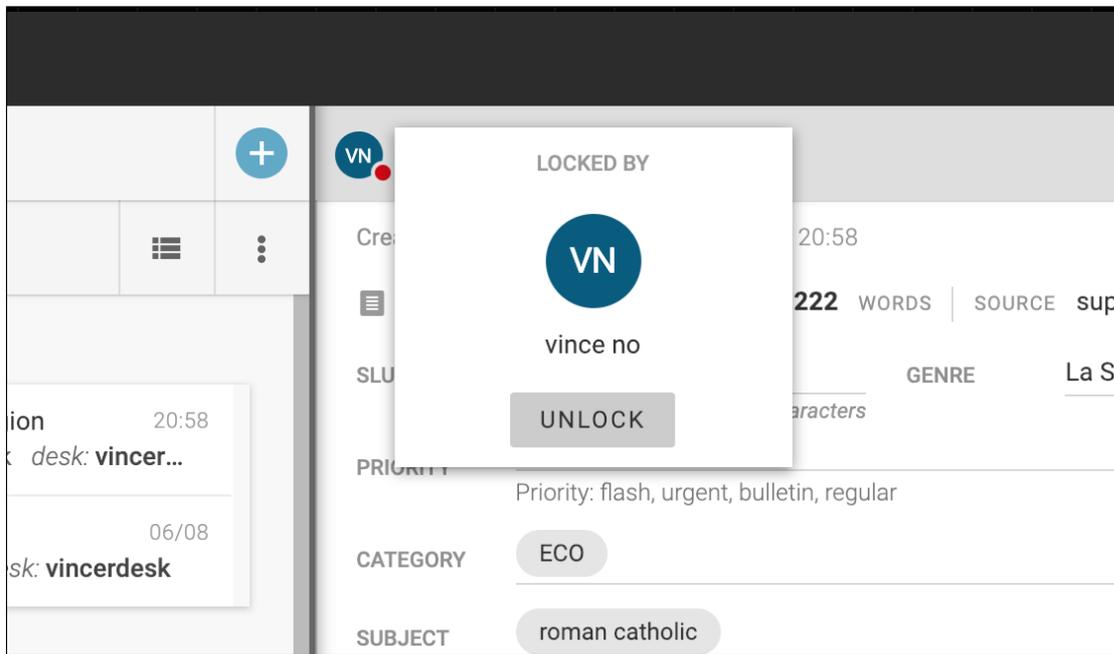
When an article is locked, if another user clicks the action menu against the item, there are options to “open”, but not to edit:



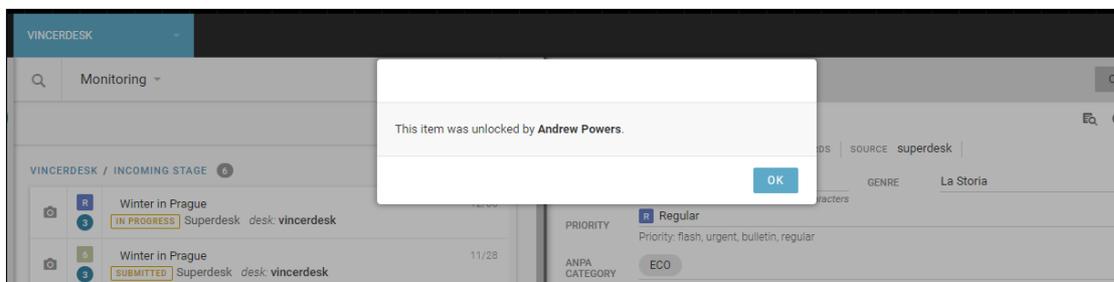
If we choose to open the item from that action menu, we’ll see it in a panel on the right, but it will not be editable. Also, in the grey strip at the top of the item, the avatar of the user with the item open for editing (the user with the lock) will be on the left, displaying a red badge.



A user with sufficient privileges can unlock the item by clicking on the avatar of the user with the lock; this will trigger a little window with an unlock button:



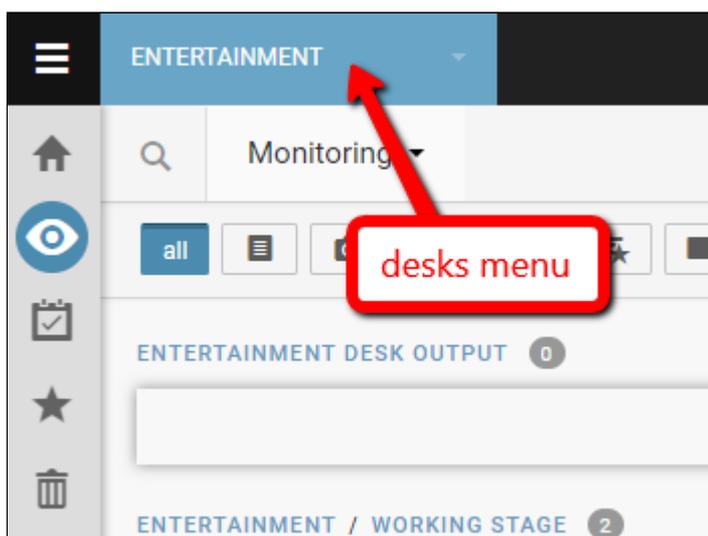
The usurped user will be informed via a pop-up message that the item has been unlocked:



Desks and Custom Workspaces

Desks are the basic organisational units in Superdesk. Desks are like the departments that you might find in a traditional newsroom. Desks could be separated by topic, function, media type or seniority, etc. Desks are configurable and customizable to suit the needs of your organization.

All users are assigned to a Desk. Some users may be assigned to multiple Desks. News items that users create, fetch, edit, spike or publish become associated with their current Desk. Users may be assigned to more than one desk at a time.



The Desks menu is beside the Hamburger Menu in the top-left corner of the Superdesk interface. It always displays the name of the desk or workspace that you're currently working on.

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

Some news items arrive at a desk after they have been selected by a user from an external source in the Search tab. Many of the news items in the Search tab may have been authored by outside sources (such as news agencies). The process of moving an article from the Search tab to a desk is called **fetching**. It is not possible to fetch articles from external sources to your Custom Workspace. You can only fetch articles to a Desk. It is possible that the same news item could be fetched to multiple desks.



This is the Dashboard icon from the Workspace panel.

Users working on the same desk will see the same widget configuration on their desk Dashboard. Only administrators can add or change widgets on a Desk Dashboard. Custom Workspaces also have Dashboards. If a user would like custom widgets, they can set them up using their Custom Workspace Dashboard.



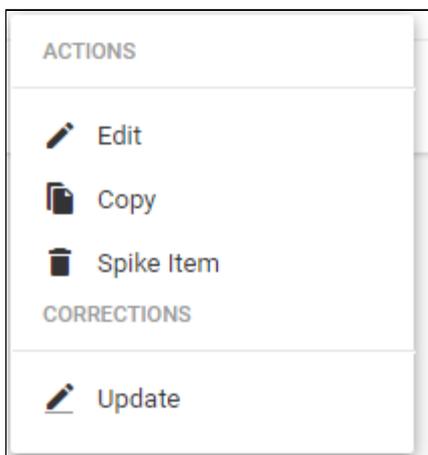
This is the Personal Space icon found on the Workspace Panel.

Personal Space is a place where journalists can create items in full privacy. Articles that are created in your Personal Space tab 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 Desk. Your Personal Space can also be accessed from the Hamburger menu.



This is an Action menu icon.

You will find Action menus in various locations throughout the Superdesk interface.



When you hover over an item that you saved either in your Personal Space or on a Desk, an Action menu icon will appear on the right. Click on the Action menu to perform actions such as editing, copying and spiking.



This is the Spike tab in the Workspace Panel.

When you spike an item from your Personal Space, it will not show up in the spiked items section and it cannot be recovered.

When you spike a news item from a desk, it will show up in the Spiked items tab associated with that desk. The Spike tab is equivalent to a trash bin or recycle bin on your operating system of choice. Spiking can be reversed and news items can be restored to the workflow at any time.

If your Desk has a content expiry, and the news item reaches the expiry limit, it will be deleted permanently if it remains on the Desk past the expiry deadline.



You will find the *Send To* icon in the top right corner of items that are open for editing.

To send an article from your Personal Space to a Desk, click *Edit* in the Action menu, then in the article window, click the purple *Send To* button. It's possible to send news items that you have created in your Personal Space to Desks that you are not a member of, but if you do, you will not be able to access the article when it is on a Desk that you are not a member of.

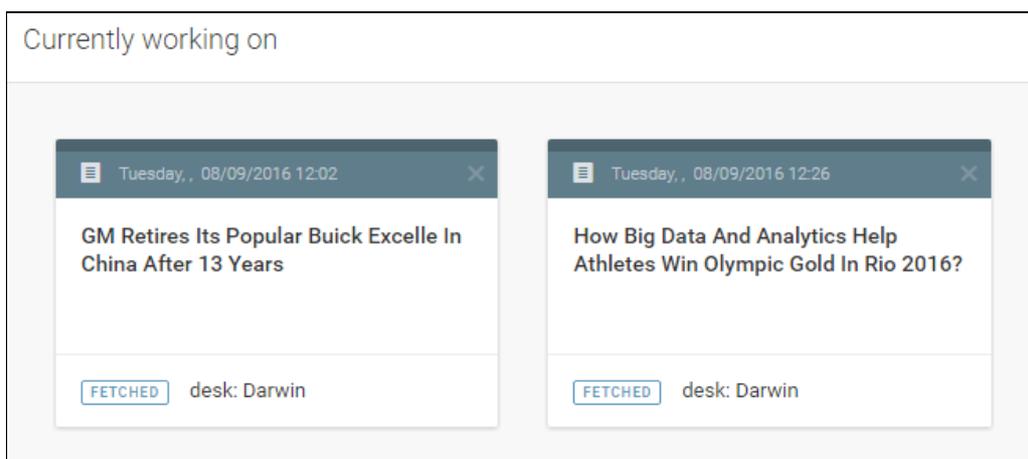


When you are editing articles, if you do not click the *Close* button but navigate away from the article, it will automatically minimise at the bottom of the Superdesk interface in the Workspace Bar. Minimised articles remain locked from other users until they are closed (either by the current user, or manually unlocked by a desk manager).



This is the Open Items icon.

You can view all your currently open items in a grid-view by clicking on the Open Items icon in the Workspace Bar at bottom left of the Superdesk interface.



Clicking on the *Open Items* icon will navigate you to a new window showing all your open articles. Clicking on one of the articles will take you back to the main Workspace and open the article that you've selected. You can exit the *Open Items* view by clicking on the X in the top right corner of the main window.

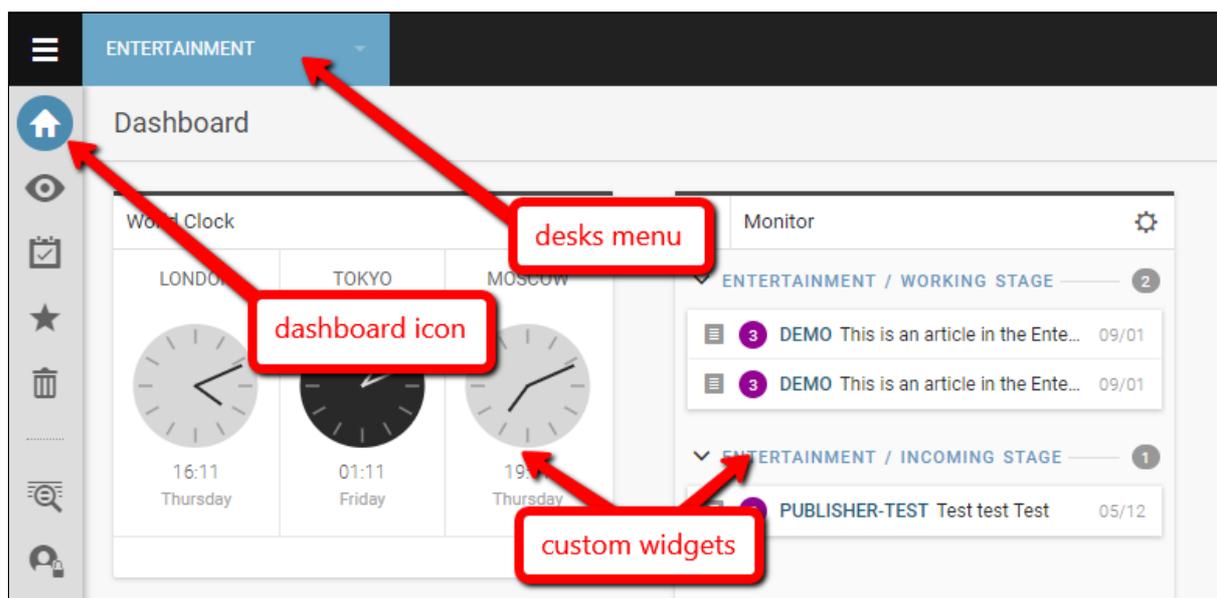
Dashboards and Widgets



You will find your Dashboard icon on your Workspace Panel.

The Dashboards for shared Desks are pre-configured by administrators (or other users with the required privileges, such as bureau chiefs, desk heads, etc). The Dashboard is designed to give a quick overview of information that matters for the respective desk's members. Users are able to configure the Dashboards in their Custom Workspaces. You can return to your Dashboard by clicking the home-shaped icon in the Workspace Panel, on the left.

You can only view the Dashboards for Desks to which you are assigned. Every user can also have a Custom Workspace which is only accessible to them, on which they can have customized widgets to suit their needs, for example monitoring several different Desks in one place. Standard Dashboard widgets are explained in detail in this section of the Superdesk manual. Your Superdesk instance might also have custom widgets.



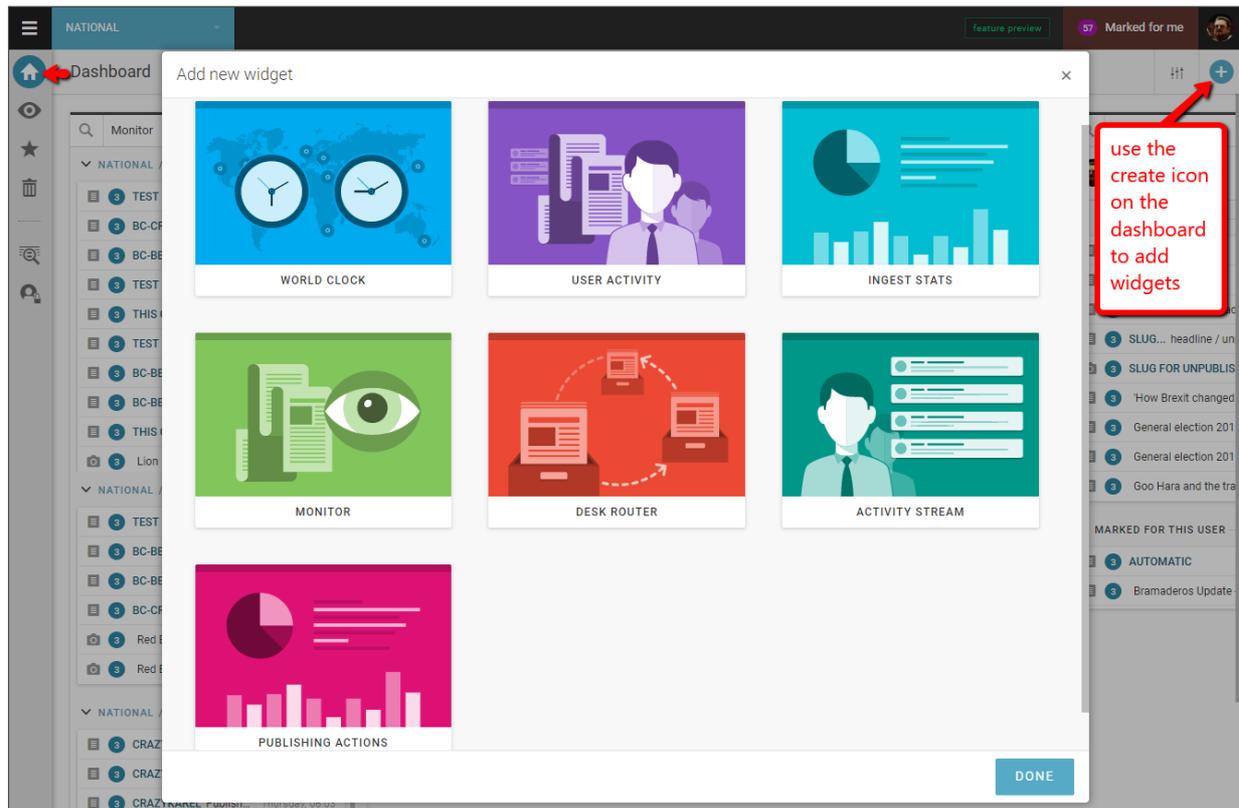
Beside the Hamburger Menu, you'll see the blue drop-down Desks menu. It will display the name of the desk you're currently working on. Click on the desk name and you'll be able to view all desks you're assigned to. Desks can be configured by editors/managers to have different Dashboard setups depending on the needs of your team.

Changes that are made to a Dashboard on a Desk will be visible to all users assigned to that Desk. Widgets on the Dashboard of your Custom Workspace are visible only to you.



This is the Create icon.

When you are on a Dashboard, you will see the Create icon in the top right corner of the Dashboard pane, just below your user icon.



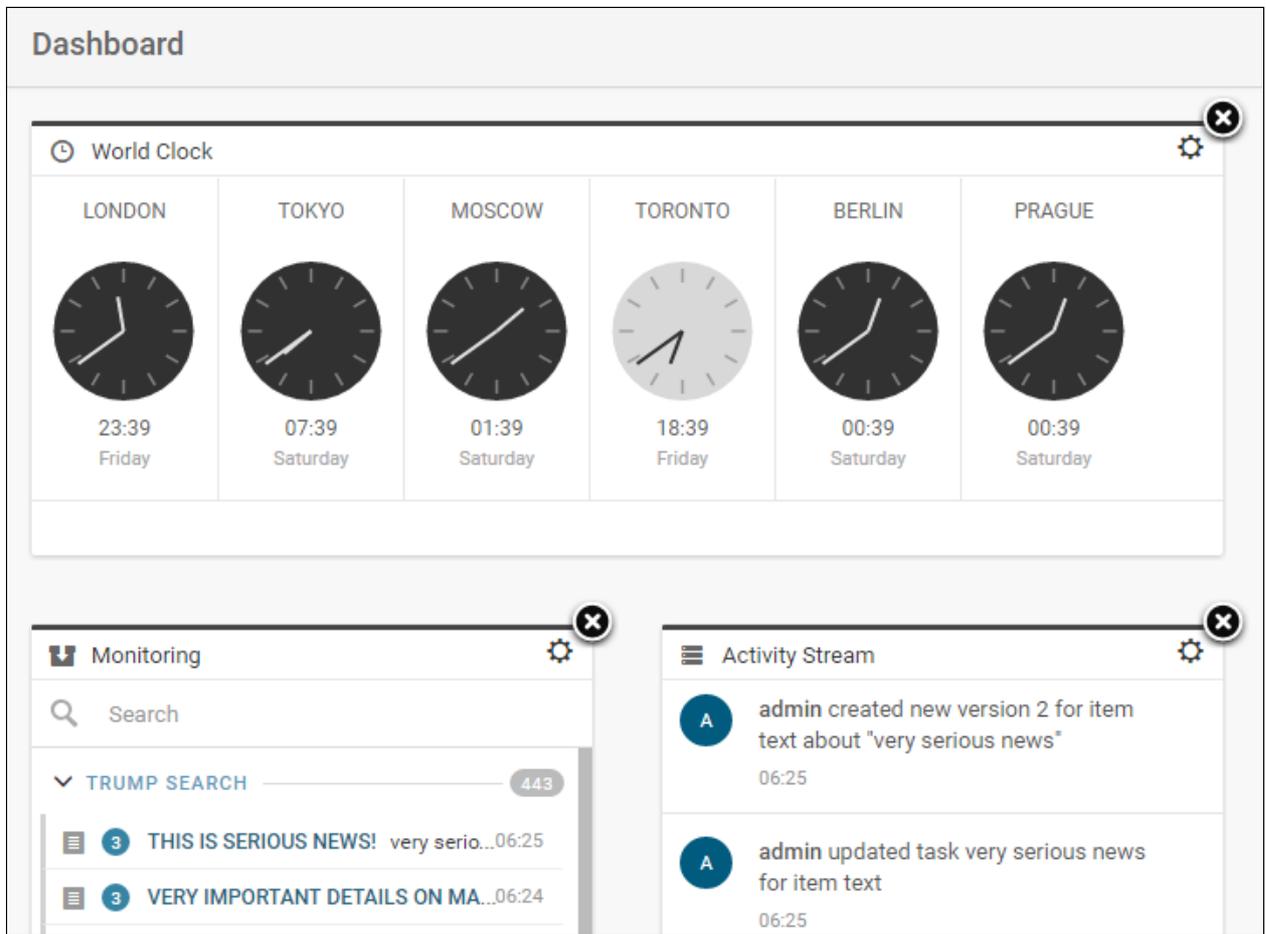
If you have the appropriate privileges, you can customise the widgets on your Desk Dashboard by clicking the Create icon at the top-right section of the pane. When you click the Create icon, a new window with widget options will open. Select the widget that you would like to add to your Dashboard, then 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.

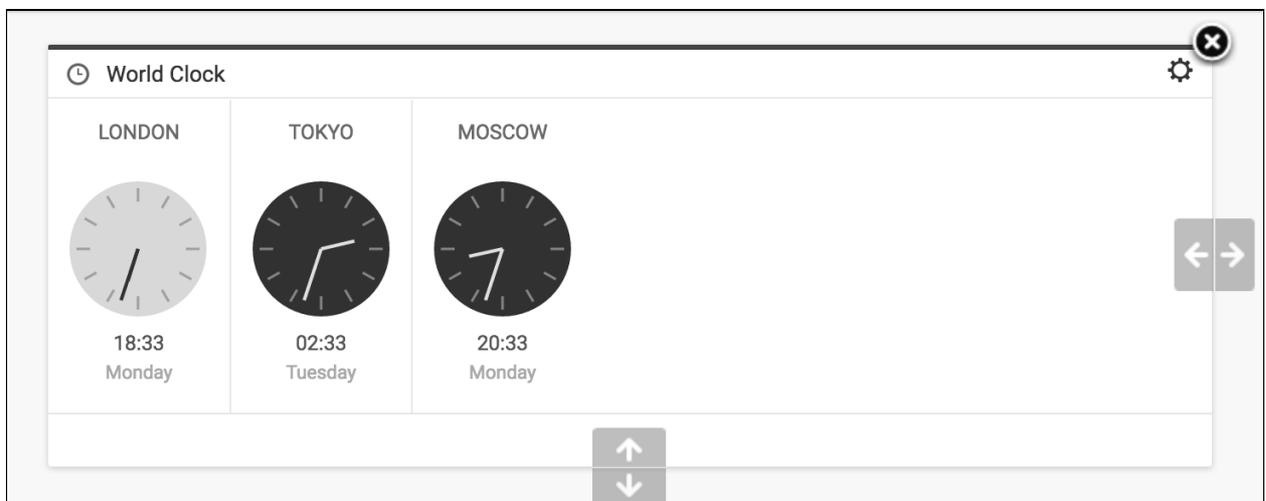


This is the Rearrange Widgets icon.

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 the 'x' on each widget you'd like to delete.



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 on 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.

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

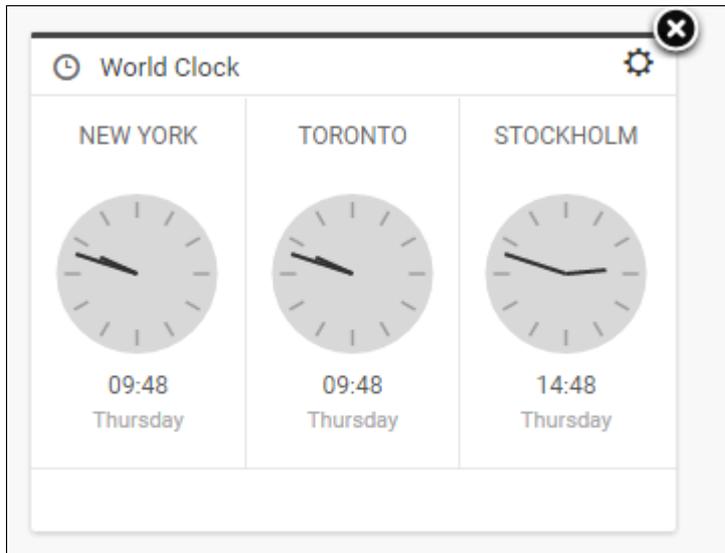


When you are satisfied with the size and layout of your widgets, click the blue checkmark in the top-right of the Superdesk interface to keep these changes.

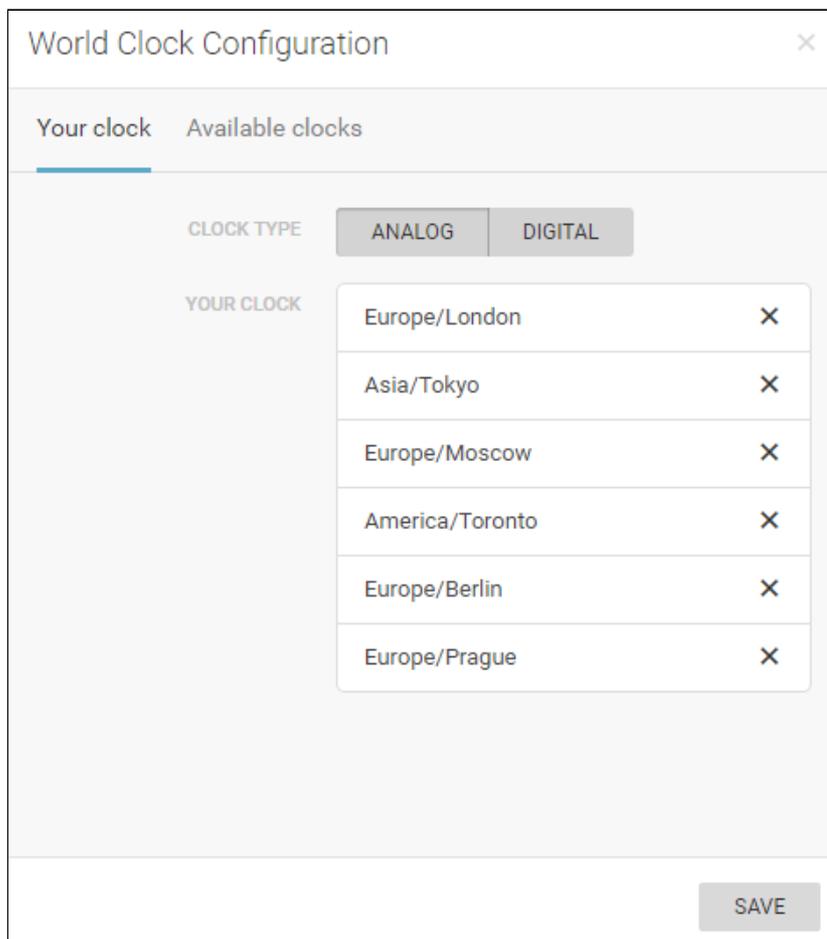
World Clock Widget Settings



To add a World Clock Widget, click the Create icon in the top right corner of the Dashboard pane, then select the World Clock option. Click the ADD THIS WIDGET button to confirm your choice.



The World Clock widget has customisable clocks for all time zones. Click the gear icon in the top-right corner of the widget to open the World Clock Configuration window.



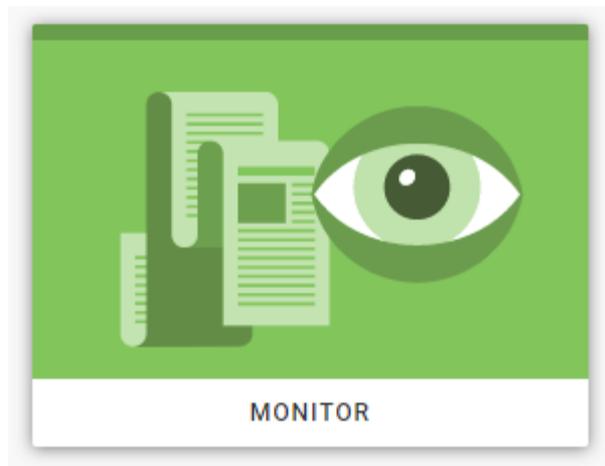
The *Your Clock* tab in the World Clock Configuration Window displays the clocks that are currently used in your World Clock widget.

To remove a clock from the widget, 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.

Monitoring Widget Settings

The Monitoring widget allows for an overview of the Desk and its Stages. Stages are the way in which content items are sorted and tracked within a Desk. For example, the Stages of a Desk might include an input Stage (destination for articles created in or fetched to a Desk), a working Stage (articles in progress), an editing Stage, or an output Stage (items ready to be published). Monitoring widgets can also be set up to show *Saved Searches*. Note that the general Stages of a Desk can be created and edited by users with the appropriate privileges in *Hamburger menu > Settings > Desks*. To add a Monitor Widget to your Dashboard, click the Create icon in the top right corner of the Dashboard pane:



To adjust the Monitoring widget 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 text box 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	<input type="checkbox"/>
Brisbane	<input type="checkbox"/>
Broadcast	<input type="checkbox"/>
Canberra	<input type="checkbox"/>
Darwin	<input type="checkbox"/>
Features	<input type="checkbox"/>
Finance	<input type="checkbox"/>
Hobart	<input type="checkbox"/>
Jakarta	<input type="checkbox"/>
London	<input checked="" type="checkbox"/>

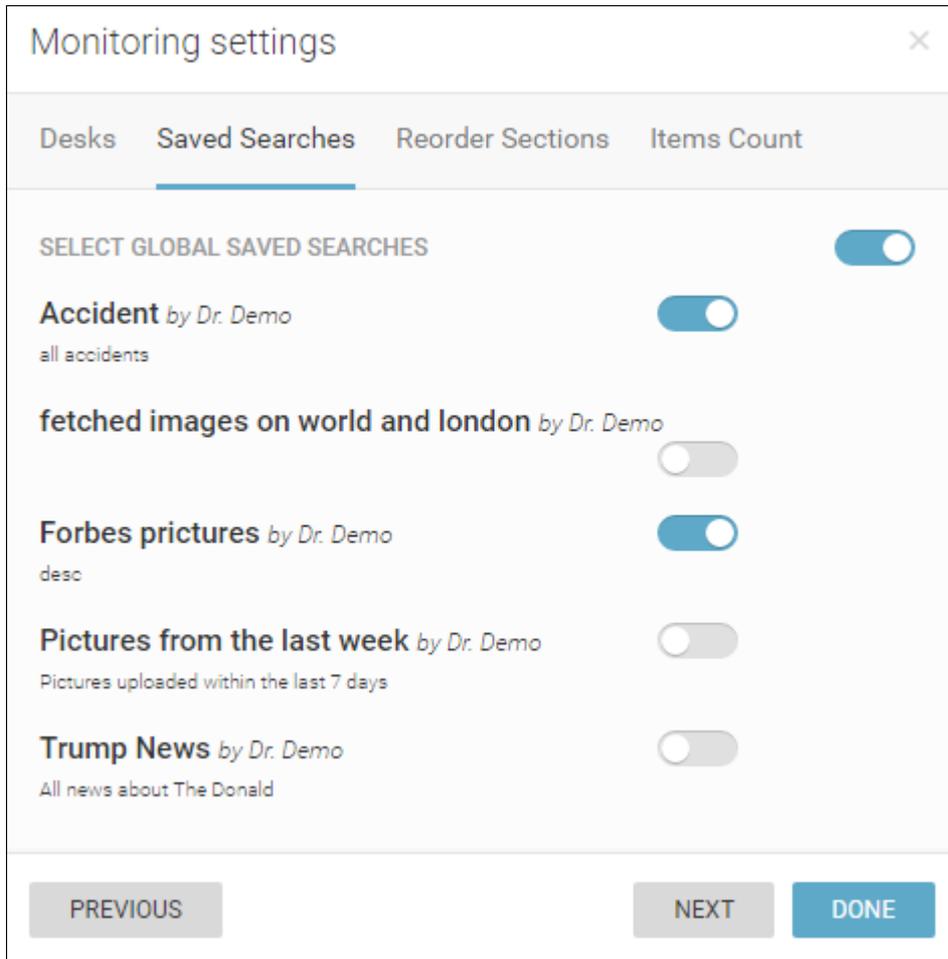
Bureau chief in
 Bureau out
 Output/Scheduled

Output/Published

Melbourne	<input type="checkbox"/>
National	<input type="checkbox"/>
New Zealand	<input type="checkbox"/>
Perth	<input type="checkbox"/>
Special	<input type="checkbox"/>
Sport	<input type="checkbox"/>
Sydney	<input type="checkbox"/>
World news	<input type="checkbox"/>

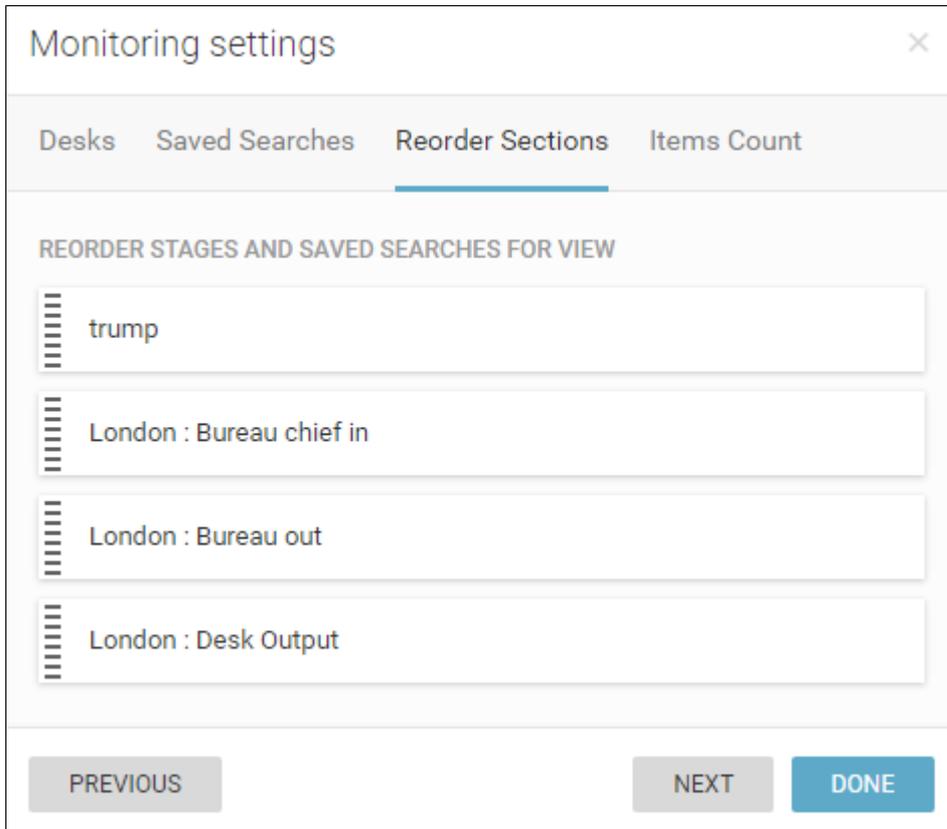
NEXT
DONE

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 desk. (The only exception to this occurs if a Stage is marked for Global Read by an administrator in the *Hamburger Menu* > *Settings* > *Desks*, in the Stage options. Stages that are marked for Global Read can be added to any Monitoring window in any Desk.) If a Stage is currently empty, the Monitoring widget will not show any information from that Stage.

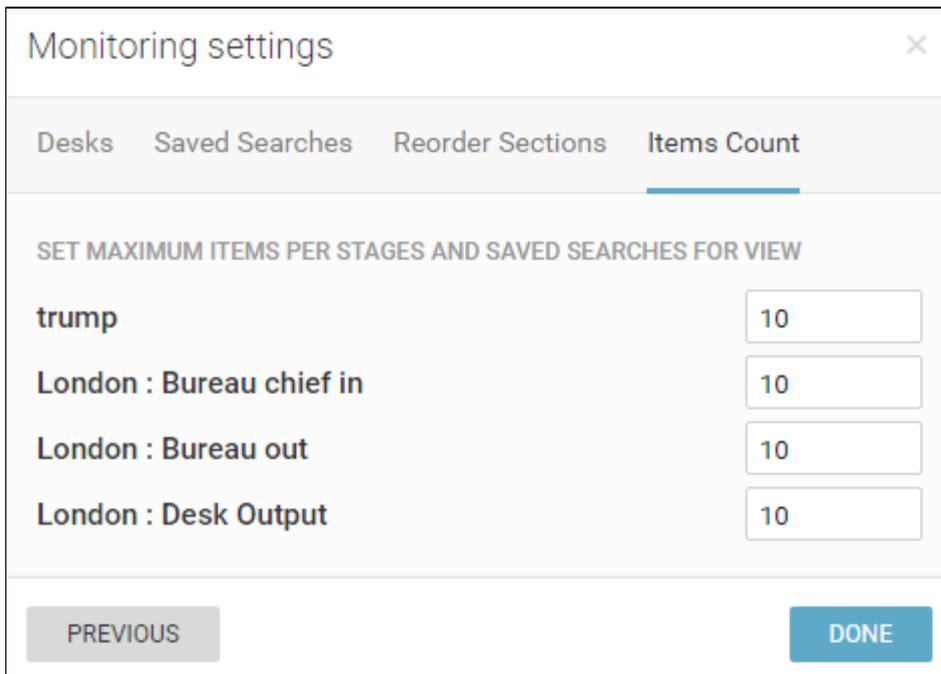


In addition to Stages, Monitoring widgets can also be set up to display *Saved Searches*. Searches can be saved from the Search icon in the Workspace Panel. To select which searches you'd like displayed in your Monitoring widget, click the *Saved Searches* tab in the Monitoring Settings window. Here you will see a list of *Saved Searches*. To add one to your Monitoring widget, toggle the switch beside the *Saved Search* to the blue *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.



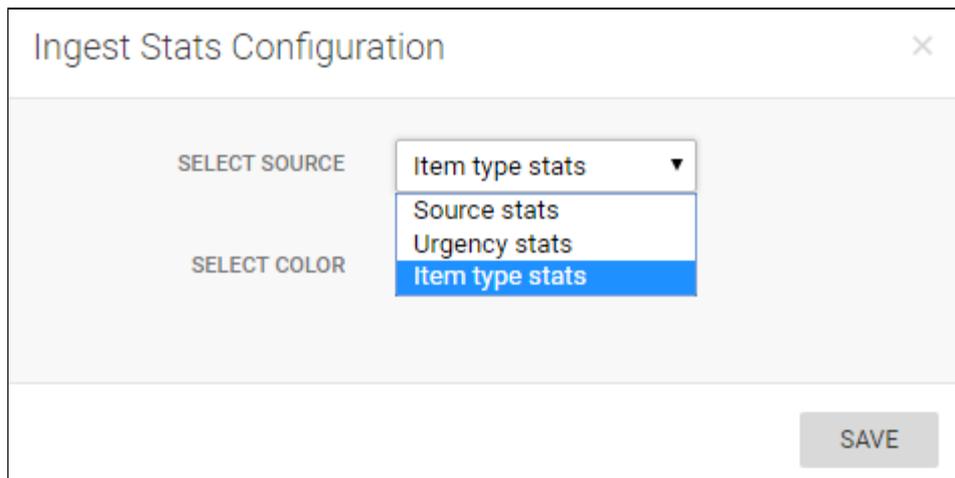
The Items Count tab in the Monitor Settings window allows you to set how many items appear in each section of the Monitoring widget. You can adjust the number of items by typing them into the text box or by clicking the up and down arrows that appear when you hover over the text box. Once you are satisfied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

Ingest Stats Widget Settings

The Ingest widget allows you to track information about the types of news items that are being ingested into your Superdesk interface. Clicking on the gear icon in the top right corner of the Ingest widget will allow you to change what information is displayed in your Ingest widget.



To add an Ingest Stats Widget to your Dashboard, click the Create icon in the top right corner of the Dashboard pane, then select the Ingest Stats option, and click **ADD THIS WIDGET**.



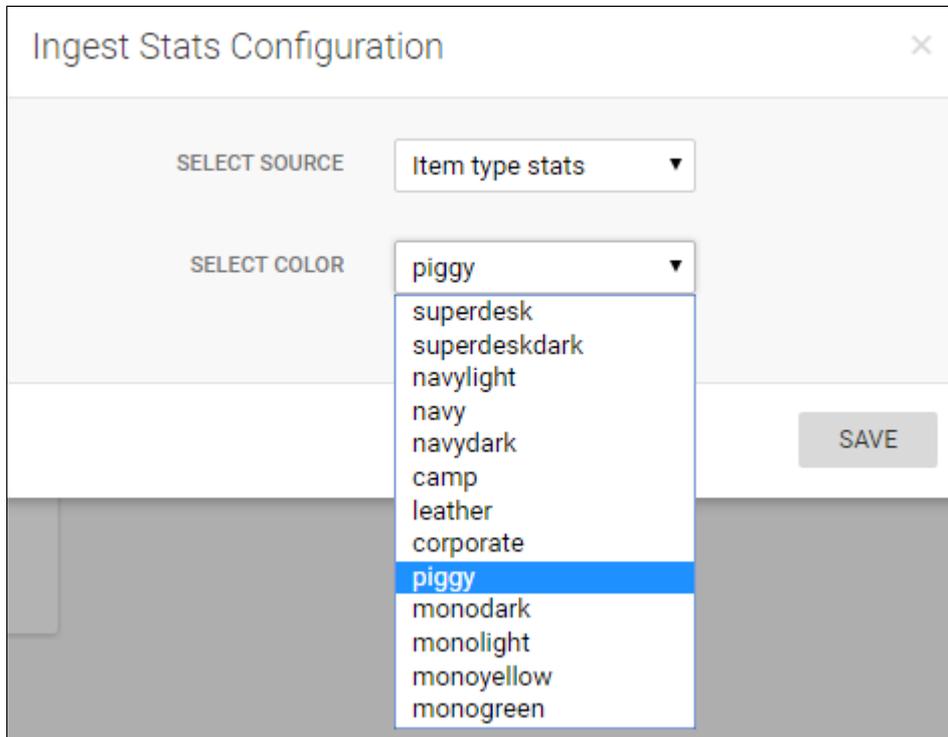
In the Ingest Stats Configuration window, select a source type from the first drop-down menu:

Source stats - What is the distribution of sources among the ingested articles?

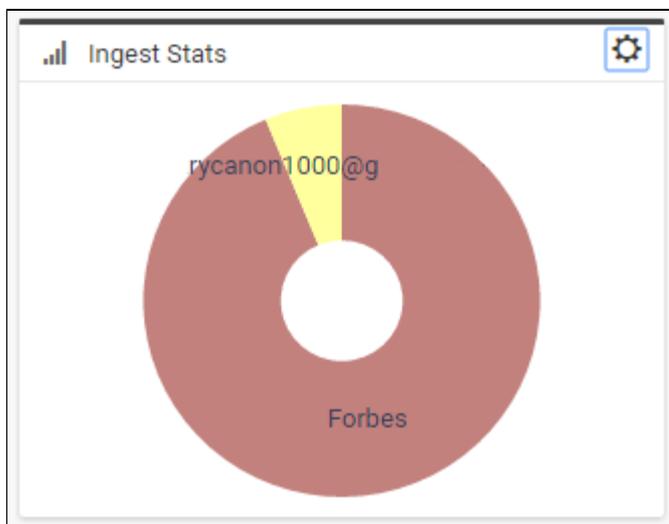
Urgency stats - What is the urgency distribution among ingested articles?

Item type stats - What is the distribution of item types among ingested articles?

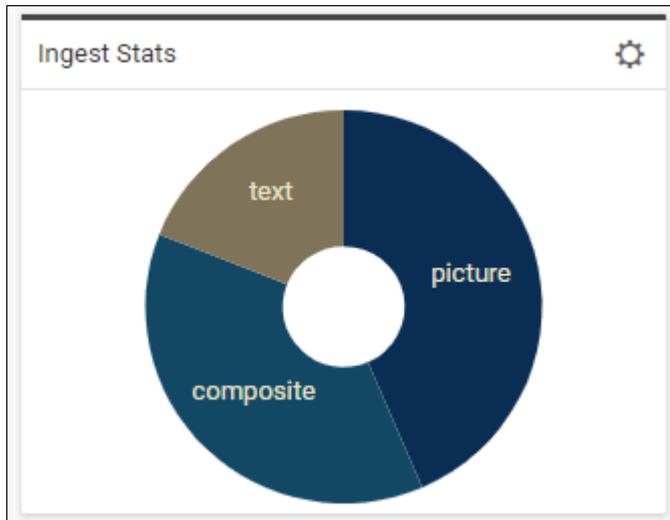
In the second drop-down menu on the Ingest Stats Configuration window allows you to choose a colour scheme for your Ingest Stats graph. The choice of colour is purely cosmetic.



Once you have adjusted your Ingest widget settings to your liking, click the *SAVE* button.

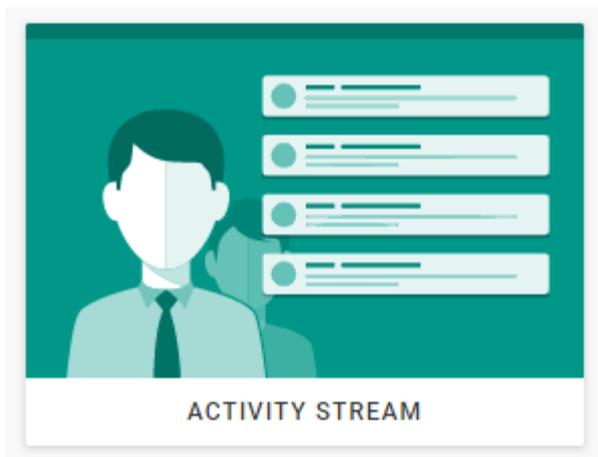


The information on the Ingest Widget is presented as a graph. In the source example above, you can see that the majority of the ingested articles are coming from Forbes.

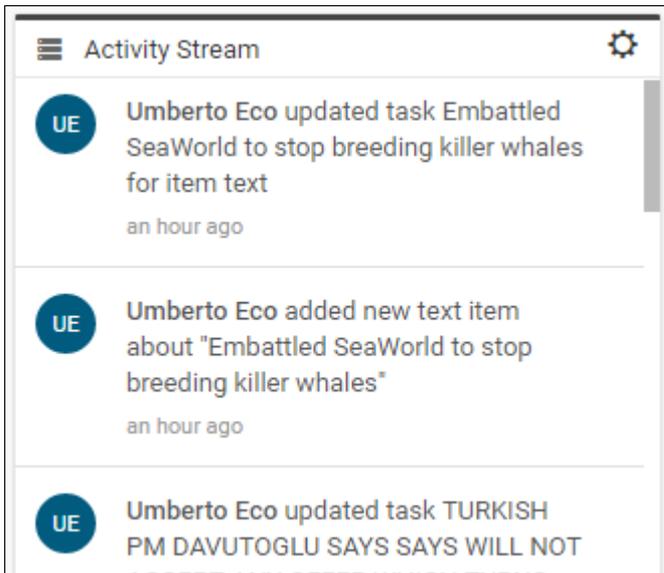


If all of the items are from the same source, urgency or item type, you will only see one colour on your graph. In the item type example above, you can see text, picture and composite items have been ingested.

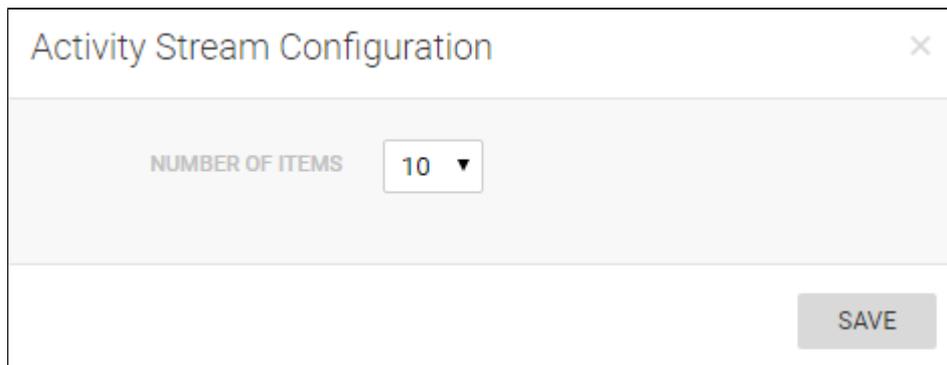
Activity Stream Widget Settings



To add an Activity Stream Widget to your Dashboard, click the Create icon in the top right corner of the Dashboard pane, then select the Activity Stream option, and click ADD THIS WIDGET.



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.

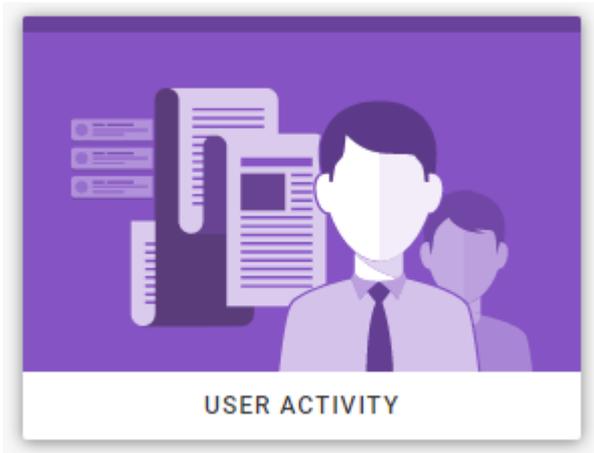


By clicking the gear icon in the top-right corner of the Activity Stream widget, you can adjust the number of items that appear in your widget. In the Activity Stream Configuration window, select the number of items you wish to see, then click the *SAVE* button.

User Activity Widget

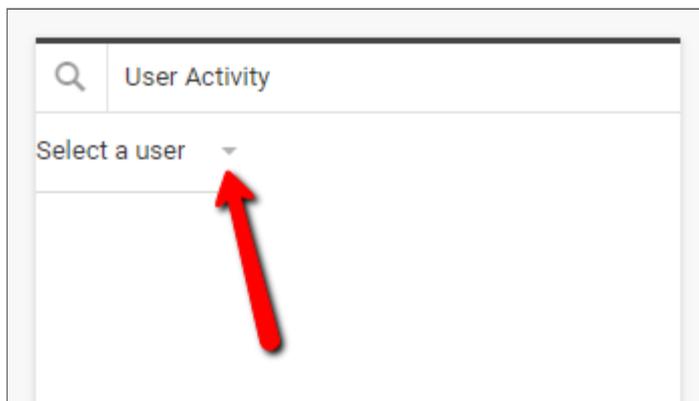
This widget is used to display the actions of a single user. The User Activity widget tracks four different activity criteria:

- 1) Items are currently **locked** by that user.
- 2) Items **marked** for that user.
- 3) Items that have been **created** by that user.
- 4) Items that have been **moved** to a working stage by that user.

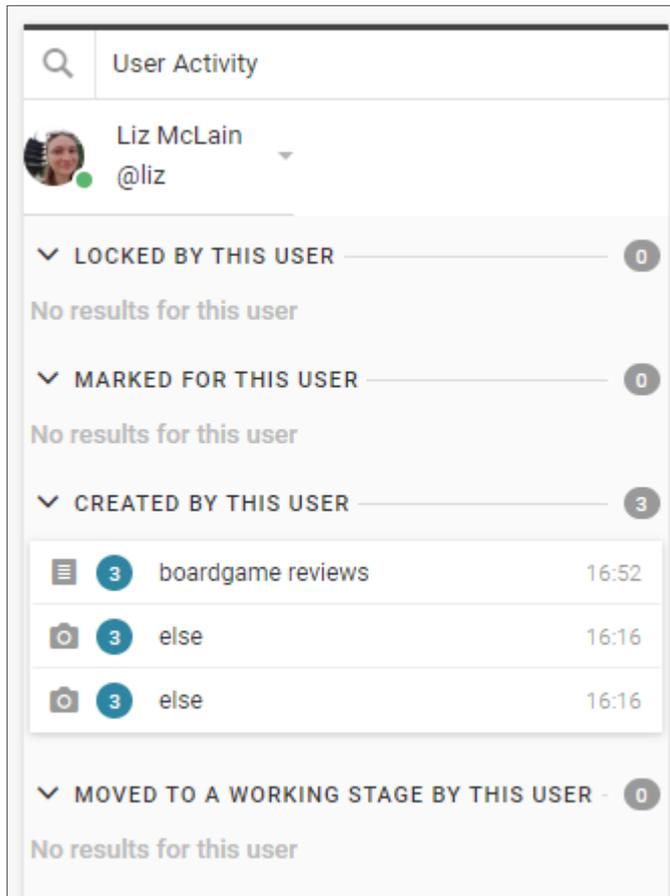


To add a User Activity Widget to your Dashboard, click the Create icon in the top right corner of the Dashboard pane, then select the User Activity option, and then click ADD THIS WIDGET.

Once the widget has been created on the Dashboard, you will need to select a user to monitor using the drop-down menu at the top left of the widget.



Only users who are members of the Desk are shown in the drop-down menu.



In the example of a User Activity Widget, shown above, the only activity that the above user has done is create a new item, and attach photos to it. Each uploaded photo appears as a separate entry in this case.

Desk Routing and Other Widgets

Your Superdesk instance may contain widgets other than those already described in this chapter. You can read about the [Desk Routing widget](#) in a subsequent chapter because of its more complex nature. For information about further widgets, please consult the documentation for your specific Superdesk instance.

Monitoring Tab



This is the Monitoring icon on the Workspace Panel.

The Monitoring View is the main workspace for production-side journalists. The content presented in the Monitoring Views is controlled from the Hamburger Menu. The idea is to present an overview of the content in each stage of the Desk’s workflow. The Monitoring pane will display the same information to every user on the same Desk. Stages and Saved Searches for the Monitoring pane can be configured by users with the correct permissions from the Desk section of the Hamburger Menu.

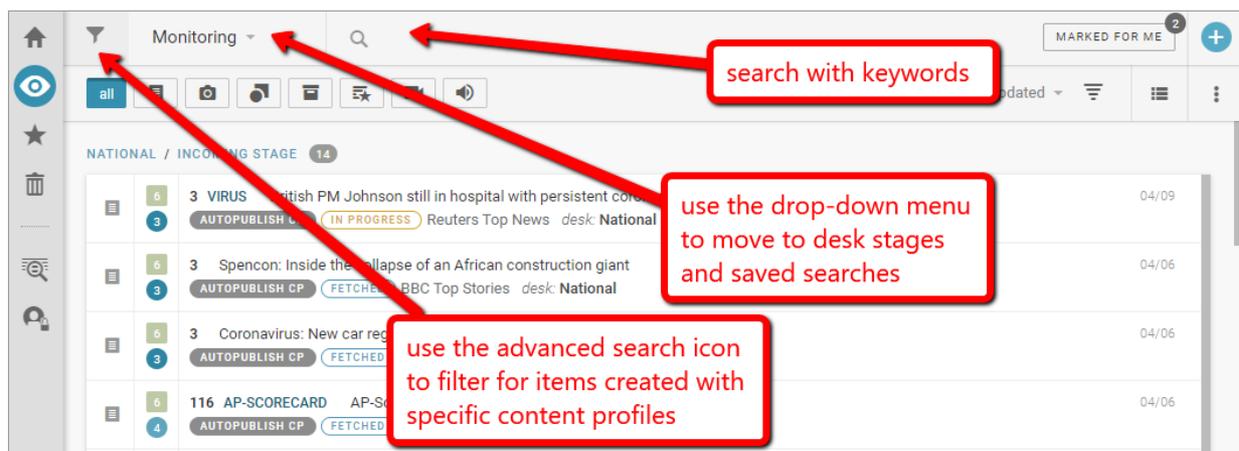


This is the Create icon.

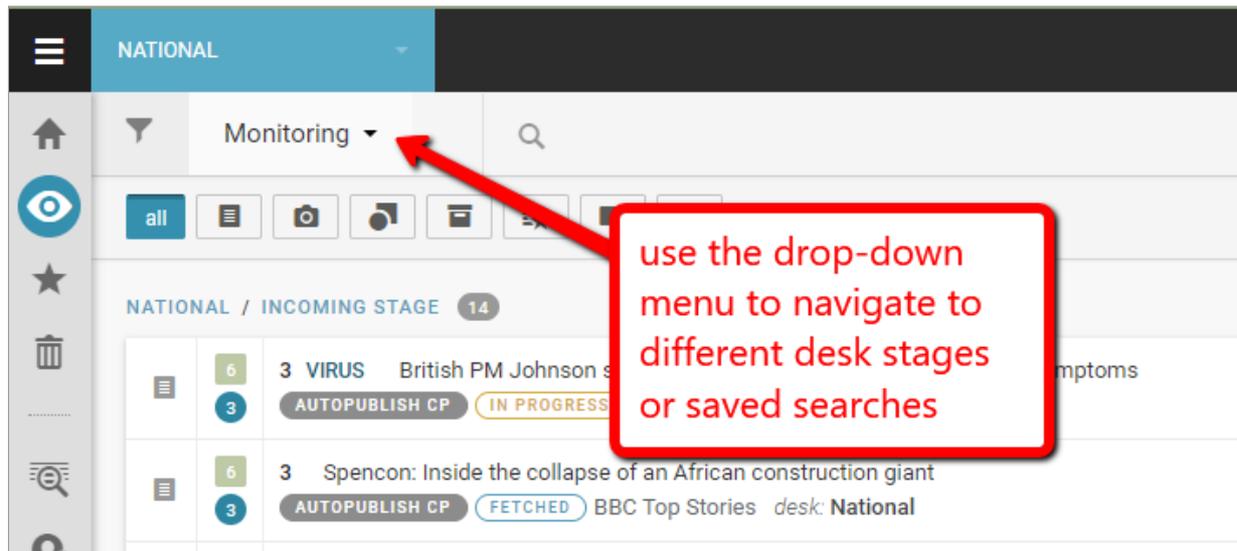
New news articles can be created, previewed and edited from the Monitoring pane. To create a new news item, click the Create icon in the top right corner of the Monitoring pane. (As of Superdesk version 1.33, users can now also create new content items from any pane using the new Create icon in the bottom of the Superdesk interface on any pane, not just the Monitoring pane).

Each user may configure personal Monitoring Views in their Custom Workspaces. A custom Monitoring view can show stages from any Desks the user has permission to see, and views of news items available in Superdesk, including those arriving in ingest feeds matching user-created Saved Searches, however, the Monitoring pane on Desks is set by the desk manager.

The Monitoring Tab in a Custom Workspace enables users whose duties require them to monitor content and activity in more than one desk to do so in a single view, rather than having to switch between the standard views set for each Desk.



The Monitoring View will usually be broken up into Desk Stages. Stages are the way in which content is sorted within a Desk. Stages are set by the administrator in the Hamburger Menu 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 to help you quickly locate content within your selected desk. You can type keywords from headlines, sluglines or body text into the text box that appears when you click on the search icon, or you can use the filter buttons located just below the search icon.



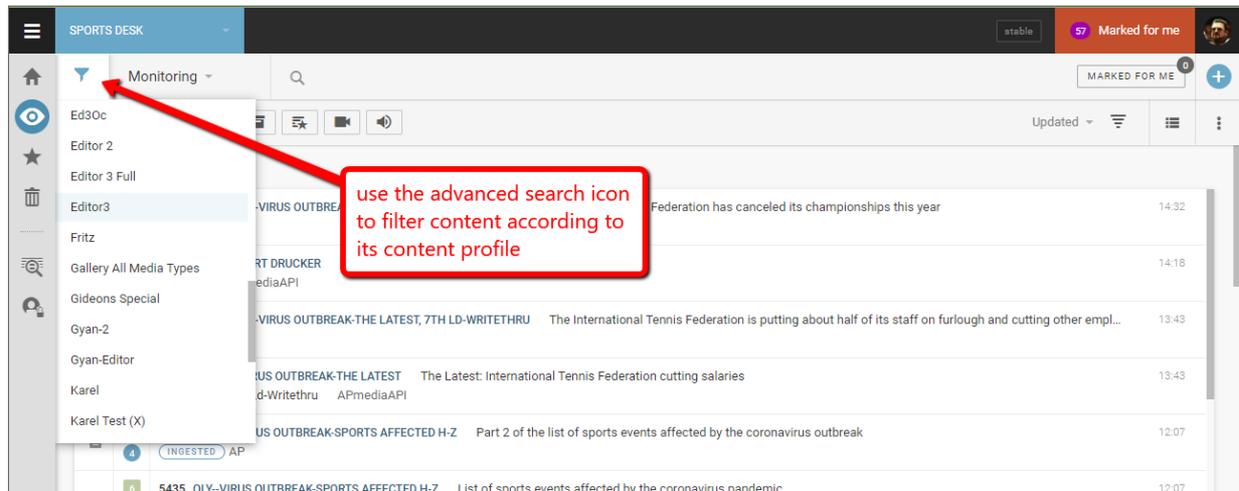
The buttons allow you to filter for a specific type of news item. By default the ALL button is selected which means every item is shown. Beside the ALL button from left to right, the buttons let you filter for articles that are just text, photos, graphics, packages (or items that contain both text and images, highlight 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 the [Creating New Articles](#) section in the Superdesk manual.)

As of Superdesk version 1.33, the Monitoring pane now features an Advanced Search icon, which allows users to filter content by the content profile used in the item creation, as shown below:



This new feature allows users to browse and find the content they need in a much easier way. It is especially important for newsrooms that make use of multiple content profiles when creating content. New filters added to the Monitoring view in future versions will also be placed in the same widget.



As of Superdesk version 1.33, the Monitoring pane also contains a 'Marked for Me' button in the right corner. Clicking on this 'Marked for Me' button allows you to view items in that Desk that have been tagged for you.

If your Monitoring view is set up to show Saved Searches, items in your Saved Search that have been fetched to your desk will be highlighted in light blue with a check mark.

6	918	AP-AM PREP-HISTORY: WED APR 29	Today in History	11:04
5		INGESTED ADV29 APmediaAPI		
5	920	BC-US--VIRUS OUTBREAK-COLLEGE SPORTS CUTS, 1ST LD-WRITETHRU	College sports programs are already being cut and mor...	10:24
4		INGESTED AP fetched in Sports Des...		
6	889	AP-US-VIRUS-OUTBREAK-COLLEGE-SPORTS-CUTS	If colleges cut sports programs, could new models emerge?	10:24
4		INGESTED 1st Ld-Writethru APmediaAPI		

Searching Content in Superdesk

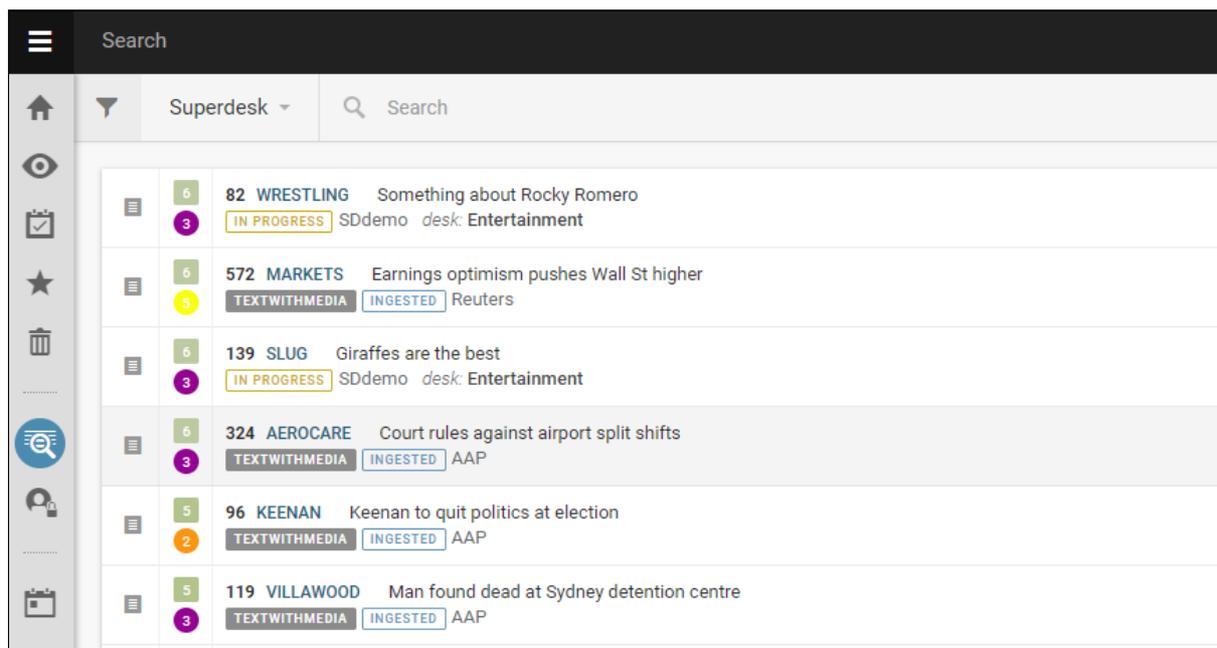
Searching Content in the Search Tab

Superdesk has a convenient built-in search function for finding news items. The Search function is also how you can view all the newly ingested articles, photos, videos and content packages. Each desk has a desk-specific search located in the monitoring pane. If you would like to search the entire content of Superdesk, click the Search tab located on the Workspace Panel.



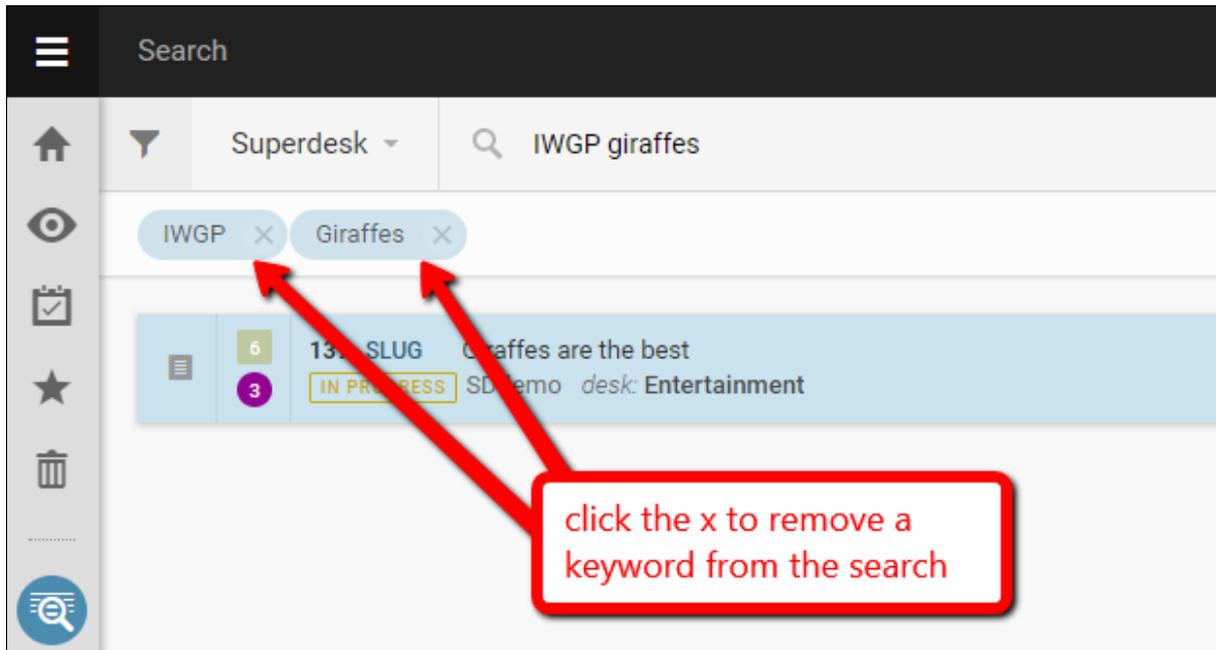
This is the Search icon on the Workspace Panel.

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

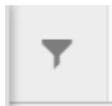


Item ID	Category	Title	Status	Source	Desk
82	WRESTLING	Something about Rocky Romero	IN PROGRESS	SDdemo	Entertainment
572	MARKETS	Earnings optimism pushes Wall St higher	INGESTED	Reuters	
139	SLUG	Giraffes are the best	IN PROGRESS	SDdemo	Entertainment
324	AEROCARE	Court rules against airport split shifts	INGESTED	AAP	
96	KEENAN	Keenan to quit politics at election	INGESTED	AAP	
119	VILLAWOOD	Man found dead at Sydney detention centre	INGESTED	AAP	

You can perform a search by typing in keywords related to the article you're looking for in the text box beside the search icon.



If you type multiple words, Superdesk will search for items containing all of those words simultaneously. In the example above, we are searching for an article that contains both 'giraffes' and 'IWGP'.



This is the Advanced Search icon.

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

You can define the Stage of the content item you're looking for: ingested, production, published or archived. You can choose multiple selections for a single search. When the buttons turn white, articles in those states will not be included in your search. To search only for newly ingested articles, for example, leave only the *Ingest* button in blue.

Item ID	Status	Desk	Headline
82	IN PROGRESS	SDdemo	Something about Rocky R
572	TEXTWITHMEDIA	INGESTED	Earnings optimism pushes Reuters
139	IN PROGRESS	SDdemo	Giraffes are the best
324	TEXTWITHMEDIA	INGESTED	Court rules against airport AAP
96	TEXTWITHMEDIA	INGESTED	Keenan to quit politics at elec AAP
119	TEXTWITHMEDIA	INGESTED	Man found dead at Sydn AAP
315	TEXTWITHMEDIA	INGESTED	Brisbane Roar, Wander AAP
2745	TEXTWITHMEDIA	INGESTED	Australia Day H AAP

Below the production stage buttons there are two tabs, one for parameters, and one for filters.

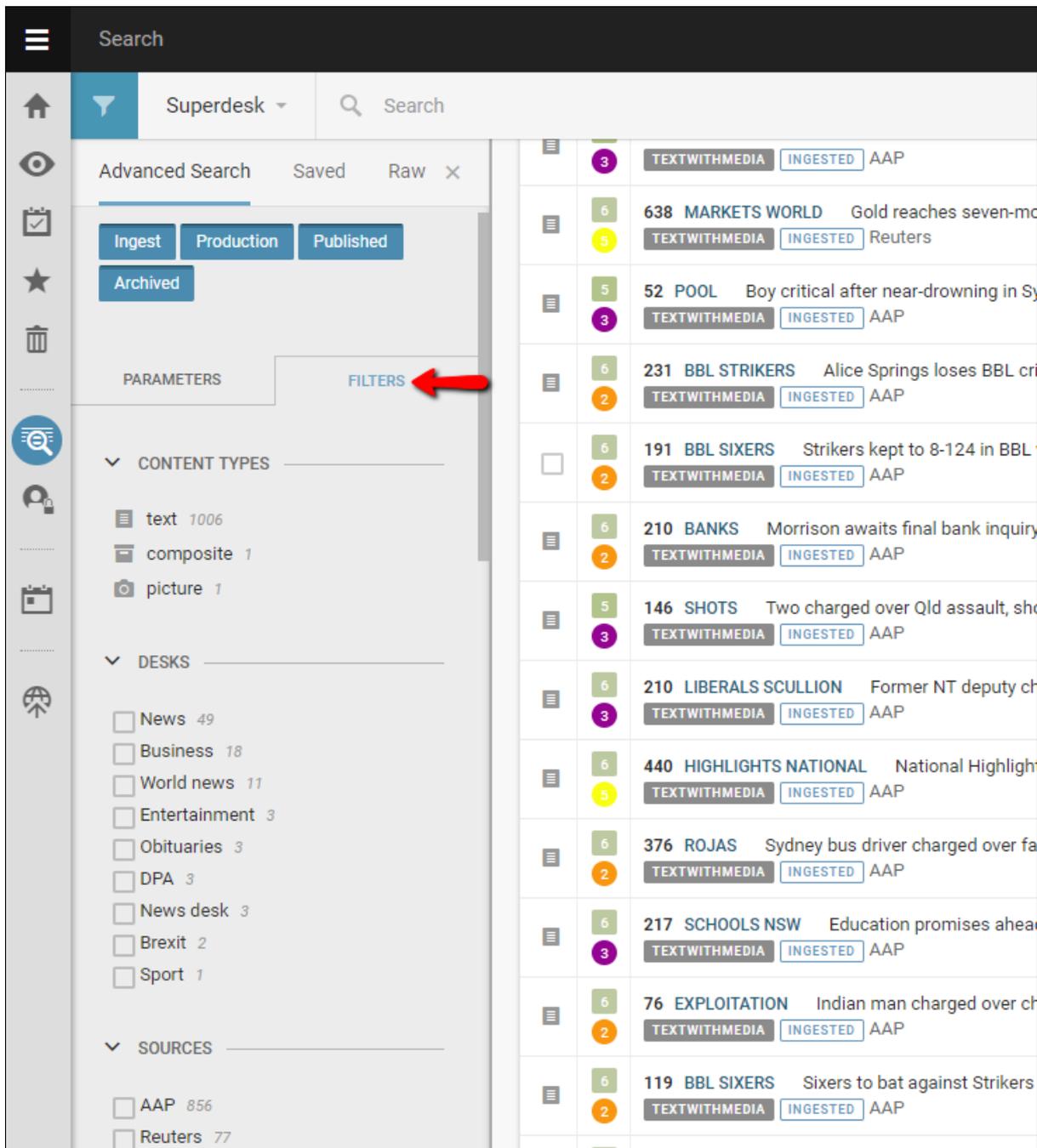
Parameters:

- **Slugline:** Input a slugline associated with the news item. This will only search words in the slugline field.
- **Headline:** Search by article title. You may enter either a full article title, consecutive or non-consecutive words.
- **Story text:** Search for words within the main body of the text. You may enter either consecutive or non-consecutive words. Enter three words for the most accurate search.
- **Unique Name:** Search by article uniqueID. You can view the article's unique name at the bottom of an article's Metadata tab using the Info button in the Editor Sidebar. By default, an article's unique name is a unique number identifier, but the unique name can be edited. Enter the unique name exactly as it appears in the info tab.
- **Byline:** Search by author's full name (must be written exactly as it appears in the author's profile).

- **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).
- **From desk:** Select desk of origin from a drop-down list.
- **To desk:** Select a Desk from the drop-down list to search for articles sent to the selected desk.
- **Creator:** Select article originator from a drop-down list of all users in your instance of Superdesk.
- **Marked Desks:** Desks can be marked, either manually, or through the use of the Desk Routing widget. If you are using the Desk Routing widget, you will need to use this Marked Desks parameter to create a Saved Search to monitor the results of the Desk Routing. A bell icon will appear next to items that have been marked.
- **Spiked Content:** Choose whether to include spiked content, exclude spiked content, or search only spiked content in this query.
- **Provider:** Select source from which the item was ingested. There is a drop-down menu of current ingest sources to choose from.

Once you have input all the applicable information into the search parameters, you can click the *Search* button to run the search.

To the right of the Parameters tab, you will also see a Filters tab. This can help you further refine your search:



For content types filters, you can search for articles containing just pictures, just text, or both by clicking on *composite*. You could also search for audio or video files.

Advanced search filters include: Content types, Desk, Ingest Source, News Category, Genre, Urgency, Priority and Flags. In the Desks section, you can further refine your search by checking off the boxes beside particular desks, to make your search desk-specific.

The image shows a vertical stack of search filter sections. Each section is headed by a dropdown arrow and a label: 'DATE CREATED', 'DATE MODIFIED', and 'DATE PUBLISHED'. Below each header are three buttons: 'LAST 24 HOURS', 'LAST 7 DAYS', and 'LAST 30 DAYS'. Underneath these buttons are two input fields: 'CREATED FROM' and 'CREATED TO' for the first section, 'MODIFIED FROM' and 'MODIFIED TO' for the second, and 'PUBLISHED FROM' and 'PUBLISHED TO' for the third. Each input field contains a calendar icon. At the bottom of the stack is a section labeled 'DATE SCHEDULED' with a right-pointing arrow.

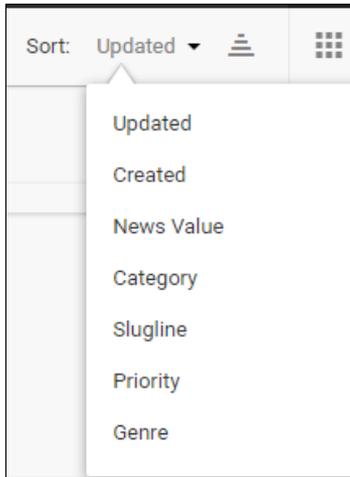
The final filter is by date. You can set a date range to search for articles created or modified between particular time periods by clicking on the calendar icons and inputting specific dates, or by selecting the pre-made buttons for *LAST 24 HOURS*, *LAST 7 DAYS* or *LAST 30 DAYS*.

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 for multiple parameters at the same time, you will see multiple

blue boxes. You can remove a parameter and widen your search by clicking on the x in the blue box to remove the filter.



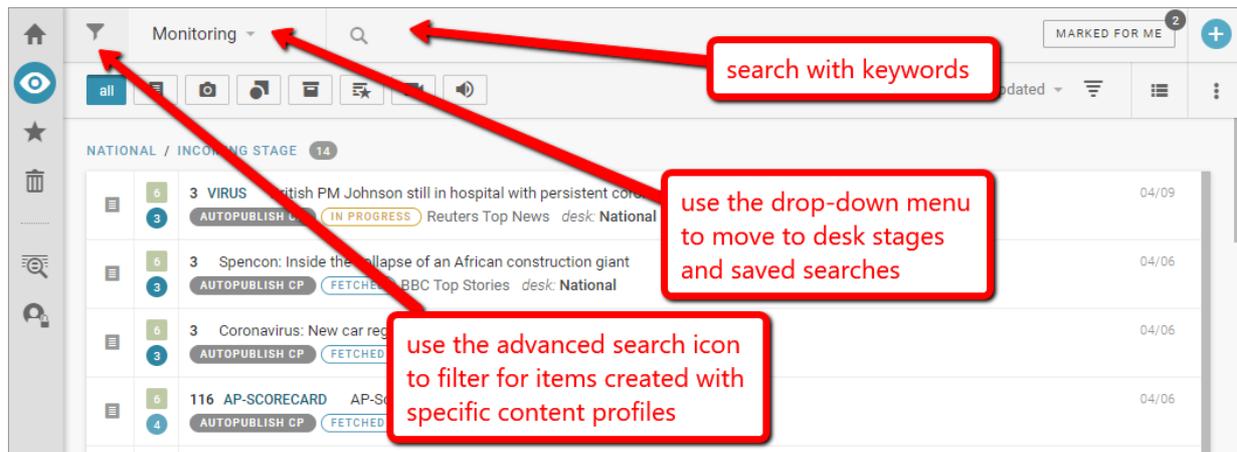
In the top-right section of the search results window, you have the option to rearrange your search results. The drop-down sort menu allows you to arrange by most recent, date created, news value, category, alphabetically by slugline, priority, or alphabetically by genre. Clicking on the reverse pyramid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



By default, the search results appear in a list 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 news items with images because it allows space for thumbnail views of the pictures.

Searching Content on your Desk

You can easily search content on your current Desk by using the search textbox at the top of the Monitoring Pane. This will search all content in that Desk's workflow. If you type multiple words, Superdesk will search for items containing all of those words simultaneously.



You can also similarly search content in a Desk's Spike tab by using the search textbox at the top of that pane.

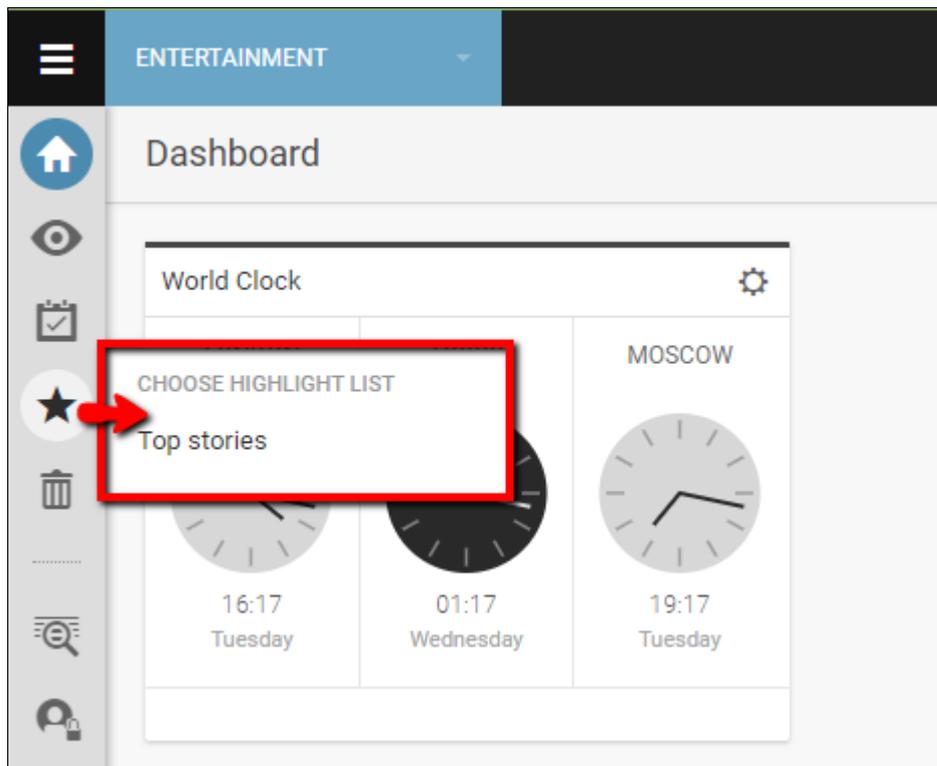
Use the drop-down menu at the top of the Monitoring pane to skip between the Stages and Saved Searches. The Advanced Search Icon can be used to filter for content that was created using a specific content profile.

Highlights

Highlights are collections of news items from a desk. Highlights are most commonly used for content indexes, top-10 lists, section features and all manner of user-curated lists. Highlights can be automatically generated against user-defined metadata, or manually curated. They can also easily be published as a unit using the bulk edit actions described in the following sections.



If you are unable to add articles to a Highlight, or create a new one, check with your Superdesk admin to verify your account has the correct privileges. New Highlights can only be created in the Hamburger menu.



You can view the Highlights for your desk by clicking on the star-shaped Highlights icon in the Workspace Panel. This will then prompt you to choose from a list of available highlights. In the example above, there's only one highlight list available: Top Stories.

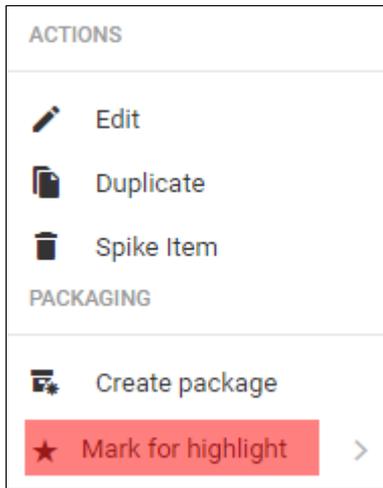
You can have several Highlights at a time to deliver relevant content organised by priority, topic or interest. Articles can be added to Highlights from various stages such as published articles, rough drafts, or simply items that have been recently fetched to a desk. Note that newly ingested articles must be first *fetched* to a Desk before they can be included in a Highlight.

Adding articles to a Highlight List



This is the Action Menu.

To add a news item to a Highlight List, find the article that you wish to add in either the Monitoring, Search or Content sections of the Workspace Panel. When you hover over the news item, the Action menu will appear.



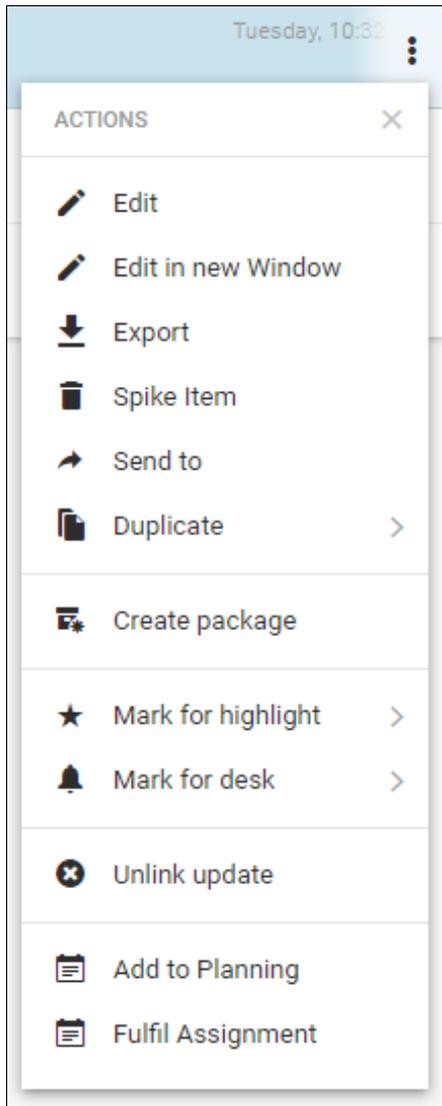
When you find a news item you would like to add to a Highlight, hover over the article to display the Action Menu on the right. Hover over 'Mark for highlight' and choose the Highlight to which you'd like to add the article. Note that Highlights can only be created (and curated) by users with the correct permissions in the Settings menu.



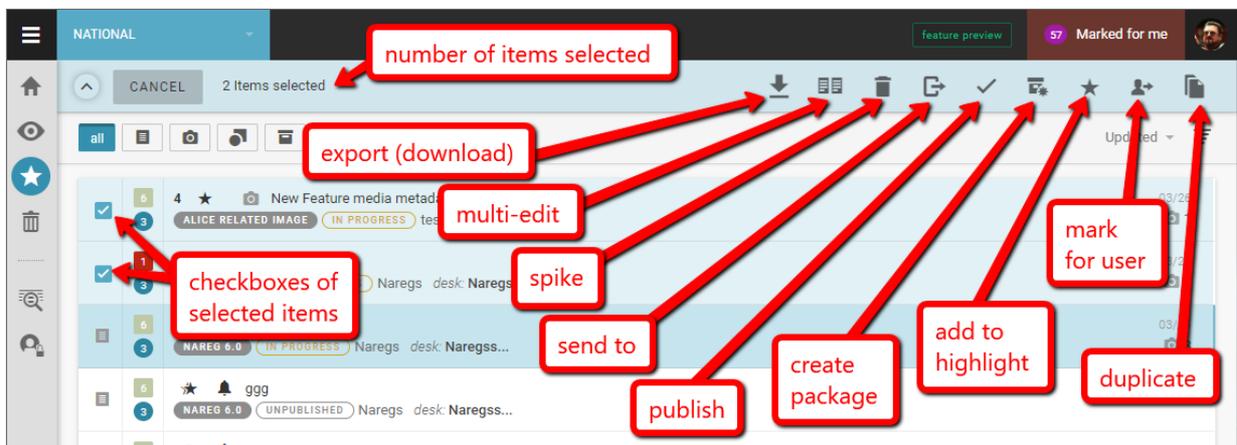
A single article can be part of multiple Highlights. A star will appear beside the article title to let you know that the article has been added to a Highlight list. If the article appears in more than one Highlight list, you will see a double star beside the article title.

Actions for news items in Highlight Lists

As with the Monitoring list view, clicking on news items in the Highlights pane will prompt an action menu on the right. Users with appropriate permissions can perform actions, just as they would be able to do from the Monitoring view.



It's also possible to select multiple items in the Highlights by using the icons on the left side of the entry as checkboxes.



Once you have selected items using the checkboxes, you can click the icons that appear in the top right of the pane to perform actions such as export, multi-edit spike, sent to, publish, create packages and mark for user provided you have the permission to do so.



Export - Download the news item to a Superdesk-external location.



Multiedit - Select items to open side-by-side for simultaneous editing.



Spike - Remove the selected item from the desk workflow.



Send to - Move the news item from its current stage to another desk or stage.



Publish - Publish this item



Create Package - Combine the selected items into a new package.



Highlight Item - Add the selected item to a different Highlight.



Mark for User - The user will receive a notification to follow up on the selected item.



Duplicate - Make a copy in the same location, or a different location.

Creating a new Highlight Configuration in the Settings menu

New Highlights are created in the Hamburger Menu. Not all users will be able to make Highlights. To make a Highlight, select *Hamburger Menu > Settings > Highlights*.



Click the CREATE CONFIGURATION icon in the top right corner of the pane. This will open a new window where you can set up your new Highlight settings.

Create highlight configuration

CONFIGURATION NAME *

characters 0/40

TEMPLATE
default template

ASSIGNED DESKS

Brexit

Business

DPA

Entertainment

News

News desk

Obituaries

Sport

World news

X-projects

AUTOMATICALLY INSERT ITEMS FROM
Today

When creating a highlights package

CANCEL SAVE

Name your Highlight. Select a Template. (This type of Template can be created in the *Hamburger Menu > Settings > Templates*). Choose Desks that have access to your new Highlight. Upon creation, you can have certain items automatically inserted into your Highlights using the drop-down menu at the bottom of the window.

Creating and Editing Content Items



This is the Create icon.

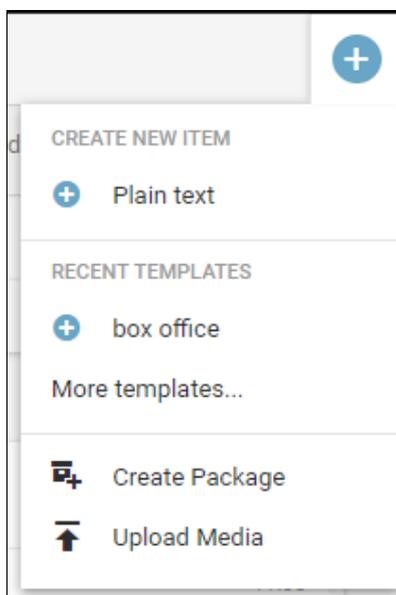
On your Dashboard the Create icon allows you to add widgets. On the Monitoring tab, or in your Personal Space, the Create icon allows you to make new articles, new packages or upload audio, pictures, and video from your computer into Superdesk. On the Dashboard tab, the Create icon only allows you to add widgets to your Dashboard. In versions of Superdesk 1.33 and later, you will also find the option to create new content items using the new icon in the bottom right of the Superdesk interface.



This upgrade allows you to create new content items in all panes, not just the Monitoring tab.

Making New Articles

To start writing a news item, or to upload some media from an external source, click the Create icon in the top right corner of the Monitoring Pane, or Personal Space. In versions of Superdesk after 1.33, you will also find the option to create items in the bottom right corner of the interface, regardless of which pane you're on. Clicking the Create icon in either of these locations will open a menu:



CREATE NEW ITEM: Select which Content Profile you will use for your new item. In the example below, there is a content profile labelled 'Plain Text'. The names of the Content Profiles will vary depending on your settings.

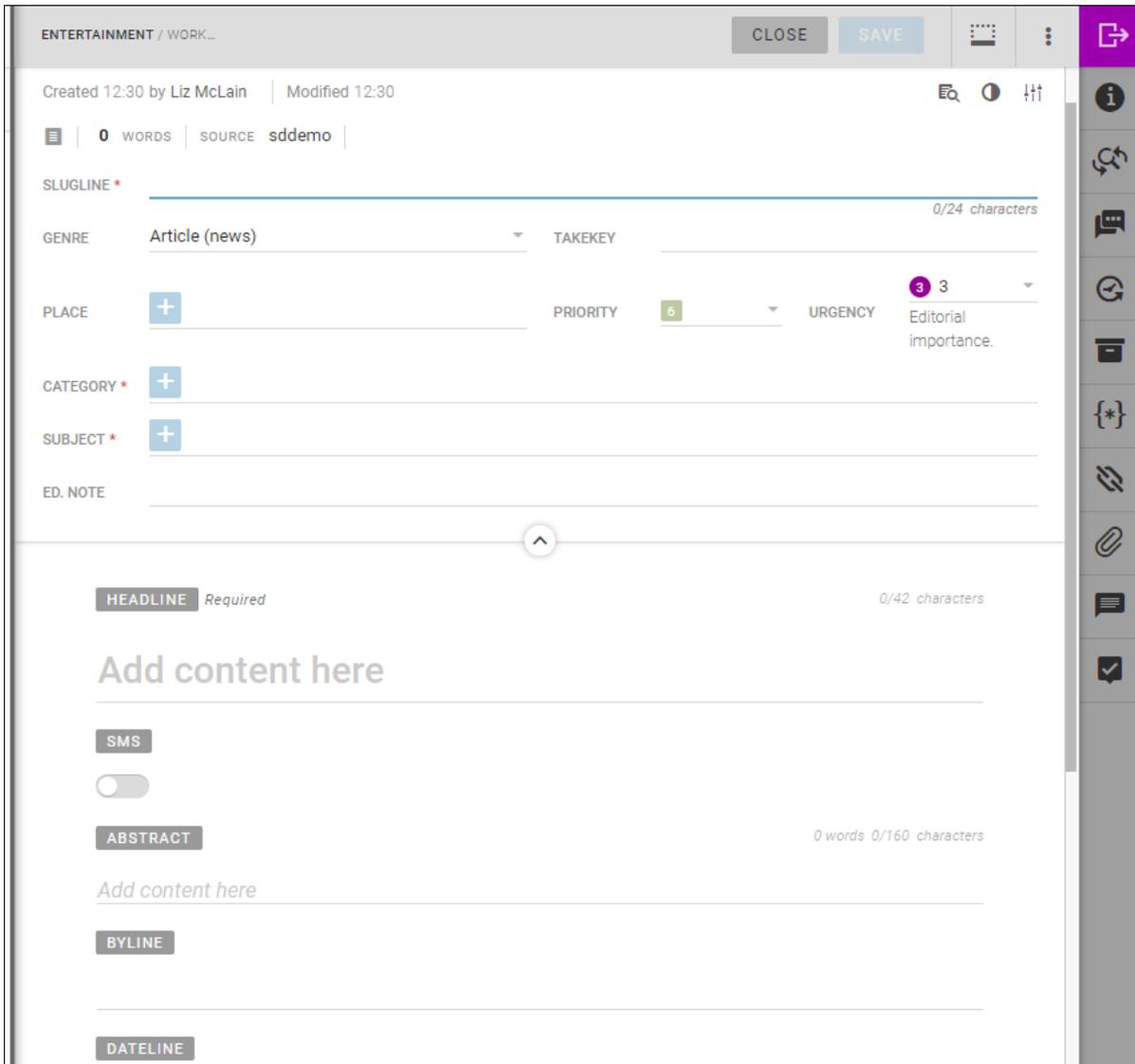
RECENT TEMPLATES: Select a template from which to create a new item. Templates can be configured with metadata fields already filled in. Once you have used a template a few times, it will appear in this Recent Templates section. In the example above, there is a frequently used template labelled 'box office'. Other than the metadata from the template already being filled in, the news item will have the same interface for editing.

CREATE PACKAGE: Make a new empty package. A package is a grouping of related news items. Creating a package this way will remain empty until you add news items to it.

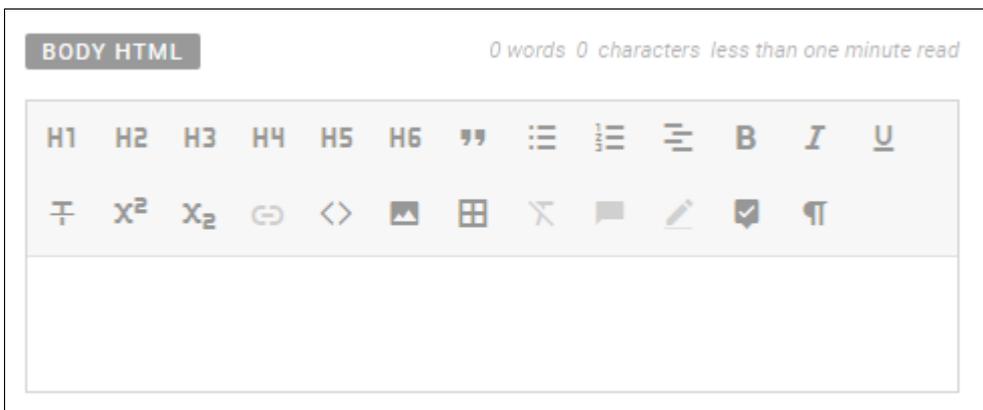
UPLOAD MEDIA: Upload a news item from your computer to Superdesk.

The content items that you can create in Superdesk have configurable metadata. Users with the appropriate permissions can dictate which metadata fields are available, and which metadata fields are required for new content items. The metadata configurations can be changed in the Settings section of the Hamburger Menu, under *Settings > Content Profiles*. When you choose to create a new item, a new pane will open on the right side of the Superdesk interface.

In the example below, there is a full set of metadata fields, but the fields in your instance may differ from the example below:



When you have chosen to create a new plain text item, for example, you may see a pane with text boxes for article metadata such as Slugline, Genre, Place, Headline and the Body. The BodyHTML field is where you create the main text for your article.



When you type in the Body text box, you will see a blue bar with icons above the textbox .This is where you are able to add formatting to your text.

-  etc. These buttons will make highlighted text into a heading.
-  This button places all the text on the current line into a special formatting for quotes.
-  This button adds a bulleted list formatting to your cursor location or highlighted text.
-  This button adds a numbered list formatting to your cursor location or highlighted text.
-  If you are pasting text from another source, and you want to preserve the formatting from the original source, select this button to keep the formatting from the original source.
-  This button will make highlighted text **bold**.
-  This button will make highlighted text *italic*.
-  This button will make highlighted text underlined.
-  This button will make the highlighted text ~~strikethrough~~.
-  This button will add a superscript to the highlighted text, for example: $4^2 = 16$
-  This button will add a subscript to the highlighted text, for example: H_2O
-  This button allows you to add a website link or link an attachment.
-  This button allows you to add an embed. Enter a URL or code to embed.
-  This button allows you to add media into the body text field. Depending on your Content Profile settings, there might also be fields specifically for feature media.
-  This button allows you to add a table. Once the table is inserted, you can add additional rows, columns and formatting. While editing the table, these options are available at the top of the Body Html field.
-  To remove formatting from a section of text, highlight the text and click this button.
-  This button allows you to add [Comments](#). If you use the @ symbol, you can notify selected users of your comments. Comments can be viewed using the Editor Sidebar.
-  This button allows you to add [Annotations](#).
-  This [Suggestions Mode](#) button allows users to collaborate on an article but proposing changes, while leaving the original text intact.
-  This button allows you to view formatting, which would otherwise be invisible, for example line breaks, which are highlighted in blue.

Note: If you are using an older version of the Superdesk editor that doesn't have the *remove formatting* button, you will need to select the text and click the same button as you used to add the formatting. For example, to remove the quote formatting from a line in an older version of the editor, put your cursor on the line containing the quote formatting, then deselect the quote button above the text.

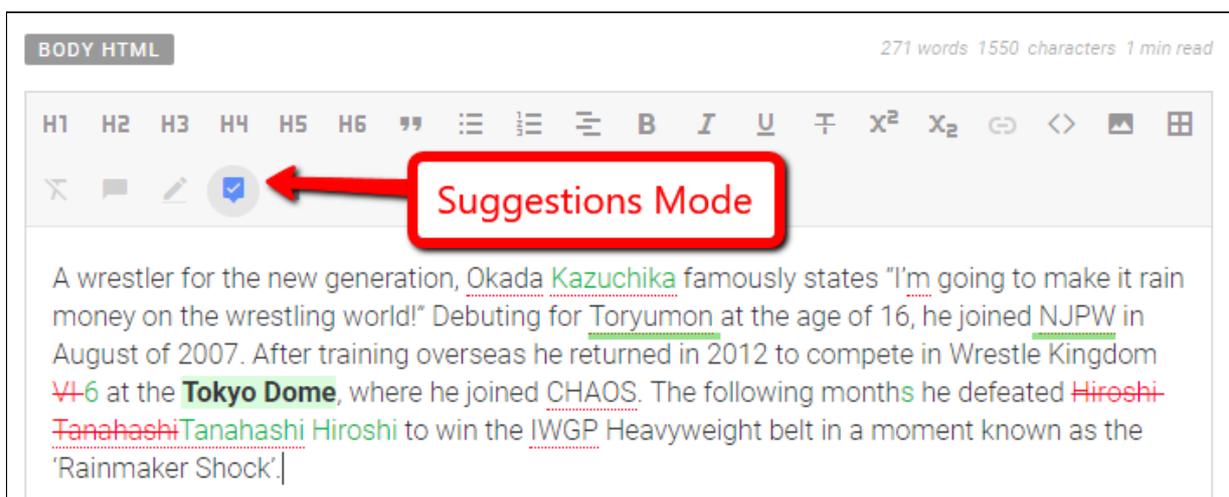


As shown above, Superdesk tracks the word count and character count of your article just above the main body text box.

Using the Suggestions Mode



When adding text in the Body HTML field, users have the option to toggle the Suggestions Mode using the button displayed above.



When Suggestions Mode is active (blue), text that is added will appear in green, and text that is deleted will appear in red with a strikethrough. Changes in formatting will be highlighted in green.



Changes can be accepted or rejected by clicking on the altered text and selecting 'accept' or 'reject' in the pop-up that appears. Suggesting Mode is a great tool for editors and journalists to work together to create quality content.

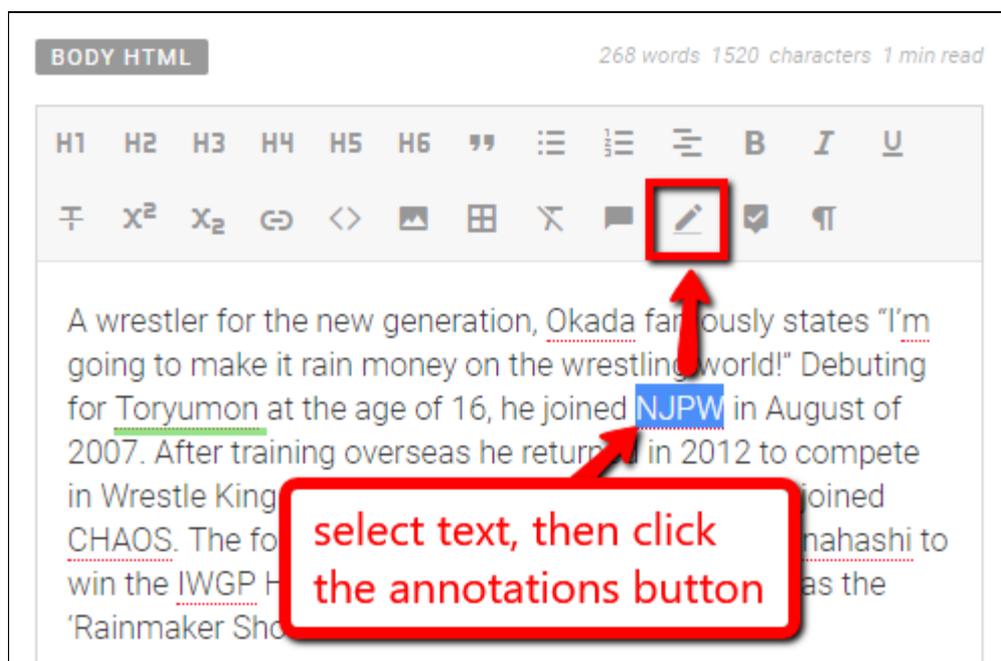
Using the Annotations feature



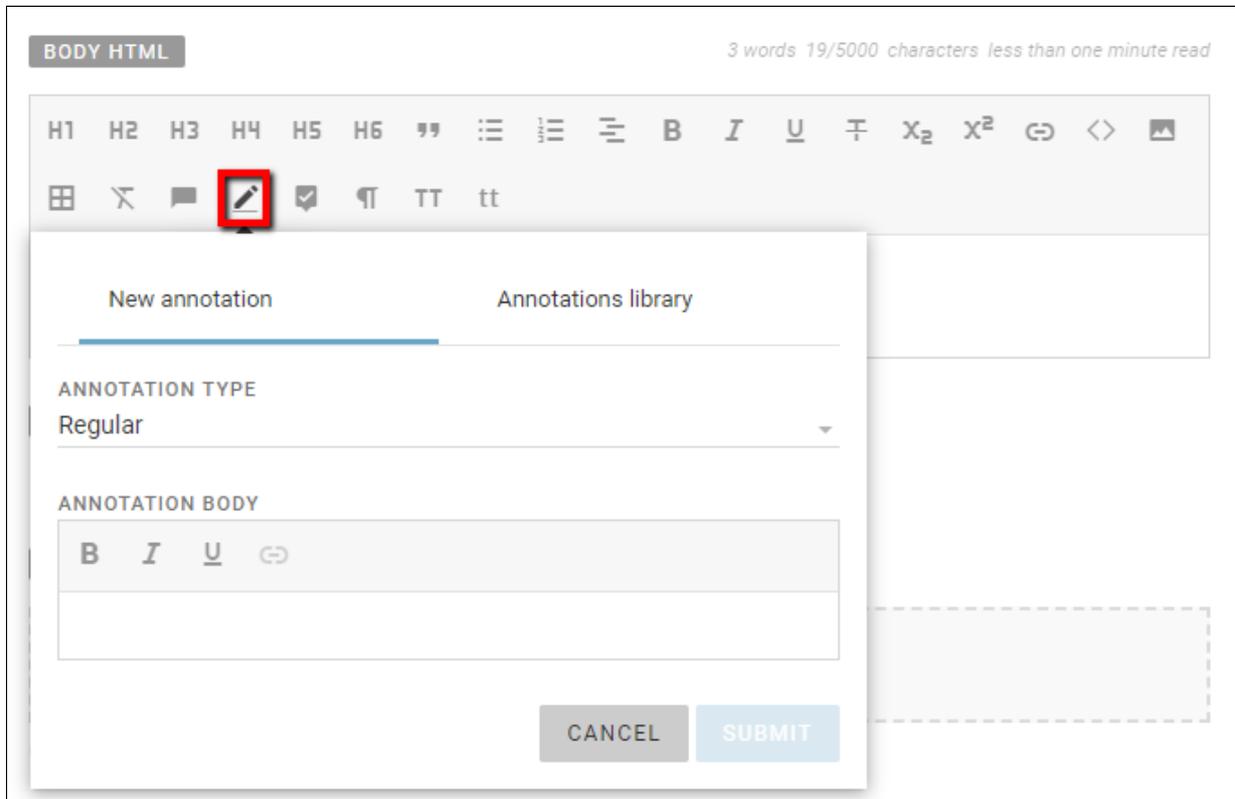
The Annotations button may appear in the formatting options at the top of the Body HTML field when editing a news item.

The Annotations feature allows journalists to provide additional contextual information on statements or events mentioned in their article. Your article can have any number of Annotations.

To use the annotations feature, highlight some text you would like to expand on from the body of your article, then click the annotations button in the toolbar at the top of the Body HTML field, as shown below.



Pieces of text that already contain annotations are underlined in green.



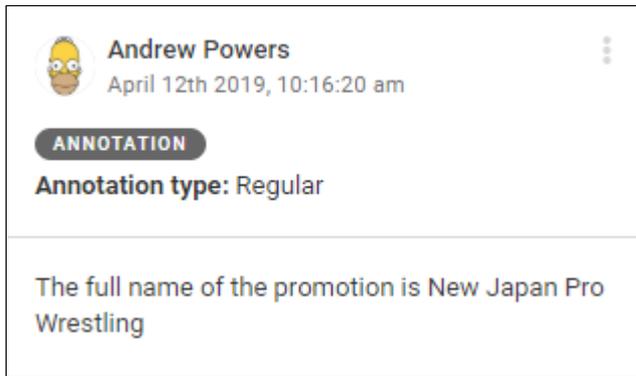
Once you click the annotations button, a window will open prompting you to choose an annotation type, and enter some text in the *Annotation Body* field. You can optionally also add some formatting to your text here.

The Annotations pop-up window has two halves: New Annotation and Annotations Library. The Annotations Library will contain all of the previously used annotations for your Superdesk instance. You can read more about the Annotations Library below.

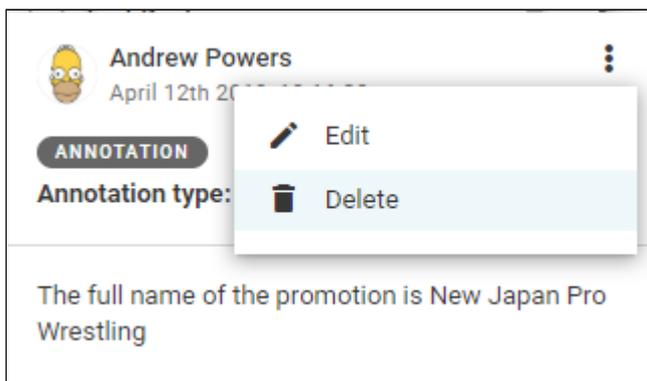
To reuse an annotation that you have used previously, highlight the text in the Body HTML field, then within the pop-up window in the Annotations Library tab, you will see options. Note that the options displayed will only be those that are related to the same highlighted text that previously.

The *Annotation Type* field allows the newsroom to make use of text annotations for different purposes (e.g. footnotes, jargon buster, remark, etc.). These types are not enforced by Superdesk, it is up to the newsroom to configure the different types to be used depending on their editorial needs.

Clicking the SUBMIT button on the annotation window will close the window and create the Annotation that you have entered.



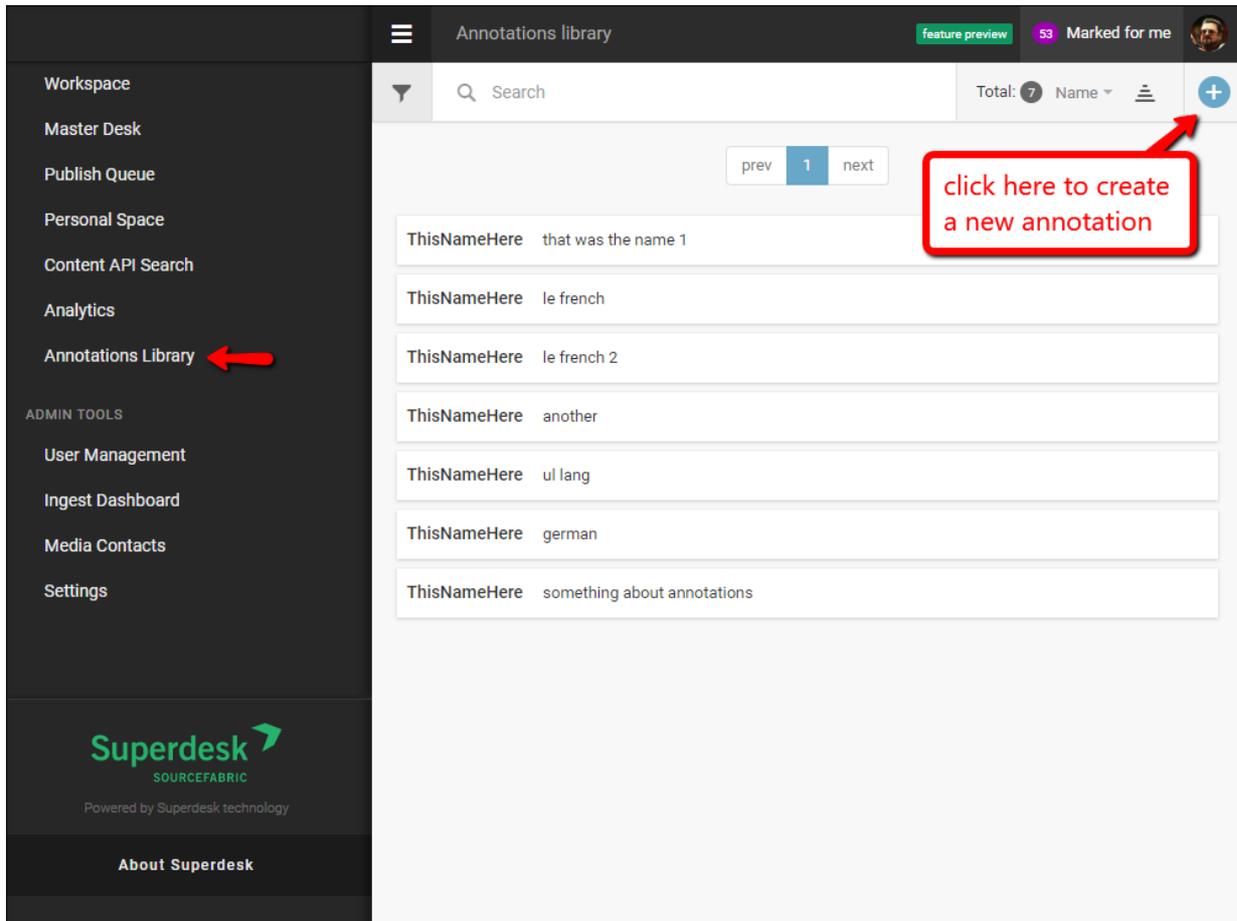
Annotations can be viewed by clicking on any text that is underlined in green.



When viewing an annotation, you can use the action button in the top-right corner of the pop-up to edit or delete the Annotation.

Annotations Library

Annotations can also be created in the Annotations Library, which can be accessed from the Hamburger menu.



To create a new annotation in the Annotation Library, click the create button in the top right corner of the Annotations Library pane.

The screenshot displays the Superdesk Annotations Library. On the left, a list of annotations is shown, each with a placeholder name 'ThisNameHere' and a description. A modal form is open on the right, highlighted with a red border. The modal contains three mandatory fields: 'NAME *', 'LANGUAGE *', and 'DEFINITION *'. The 'DEFINITION *' field includes a rich text editor with bold, italic, underline, and link icons. The modal has 'CANCEL' and 'SAVE' buttons at the top.

In the pane that opens when you click the Create icon, you are prompted to add a Name, Language and Definition. Each field is mandatory. In the NAME field, add the text that you will be annotating. Enter the Language code in the LANGUAGE field. In the DEFINITION field, add your annotation content. As of Superdesk version 1.33, the Annotations Library allows for multiple annotations with the same name. This allows writers to be able to choose which annotation best fits their article. In addition, the Language field is now prefilled when creating a new annotation, so be sure to change it if the annotation you're creating does not match the default language.

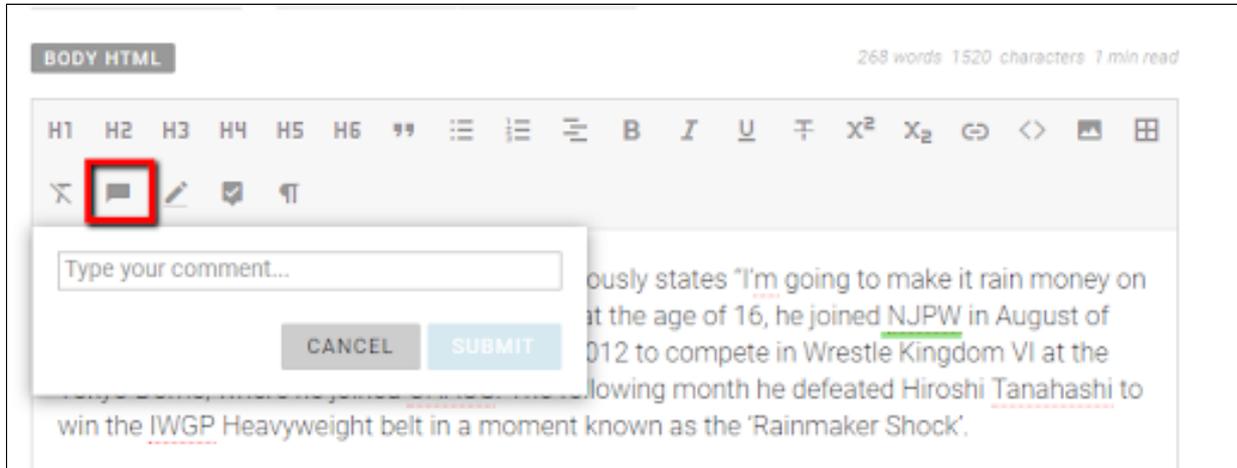
Once you hit the SAVE button, your annotation will be available to select using the annotation button above the BODY HTML field in the article editing window, under the Annotations Library tab. Note that the option to select the annotation will only show up if the highlighted text is exactly the same as the NAME field.

Using the Inline Comments feature



Users can add comments to the body of news articles using the Inline Comments feature in the toolbar at the top of the Body HTML field.

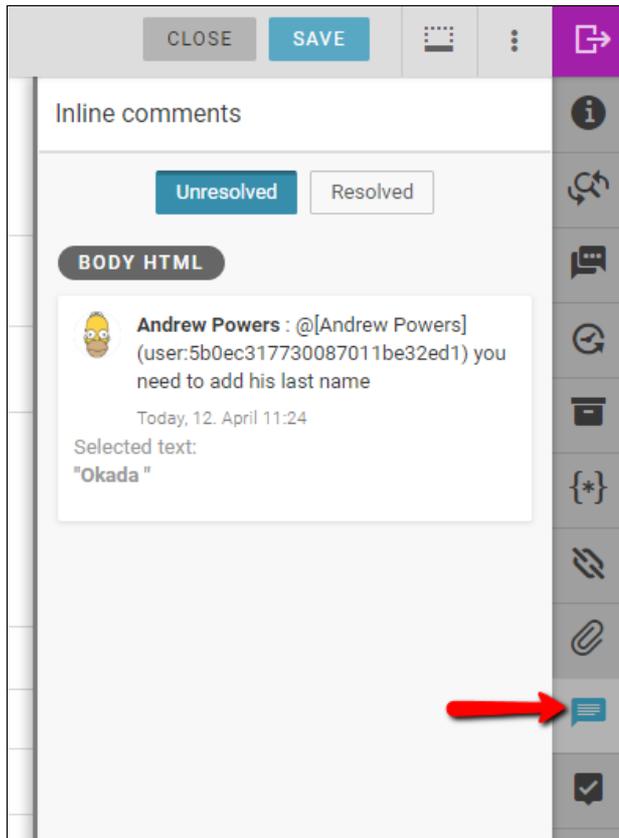
To add a Comment, highlight some text in the Body HTML field of an article, then click the Comments button in the toolbar above.



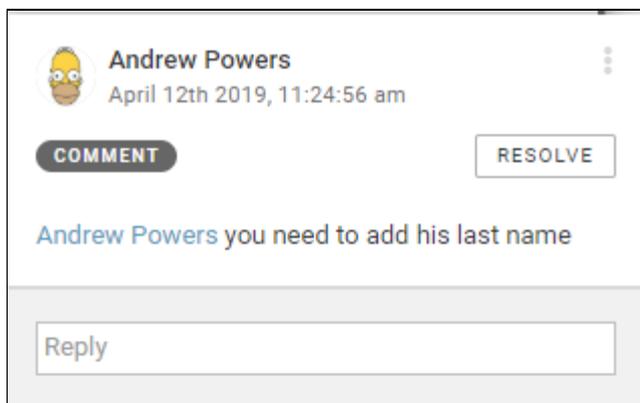
Type your Comment in the pop-up provided. Use the @ symbol and the username to notify them of Comments that need immediate attention. Upon submitting the Comment, the tagged user might be notified through the Superdesk-internal notifications or by email, depending on the user's preferences.



All of the Comments, both resolved and unresolved, can be viewed by clicking the Comments icon in the Editor Sidebar when an article is open for editing.



The two buttons at the top of the Inline Comments pane allow you to view both resolved and unresolved Comments.



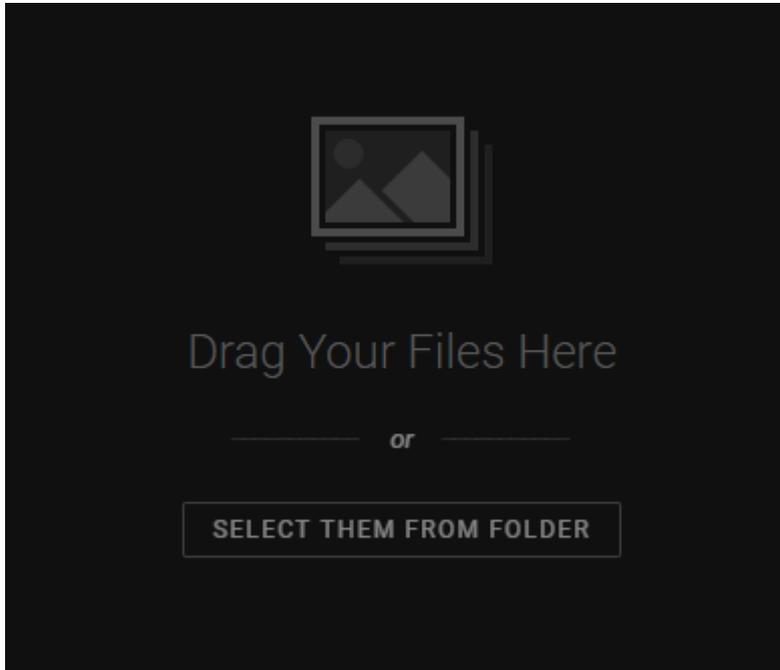
To resolve a Comment, click on the highlighted text in the Body HTML field and click the RESOLVE button, or write a reply in the textbox provided.

Adding Media to the Body of your Article

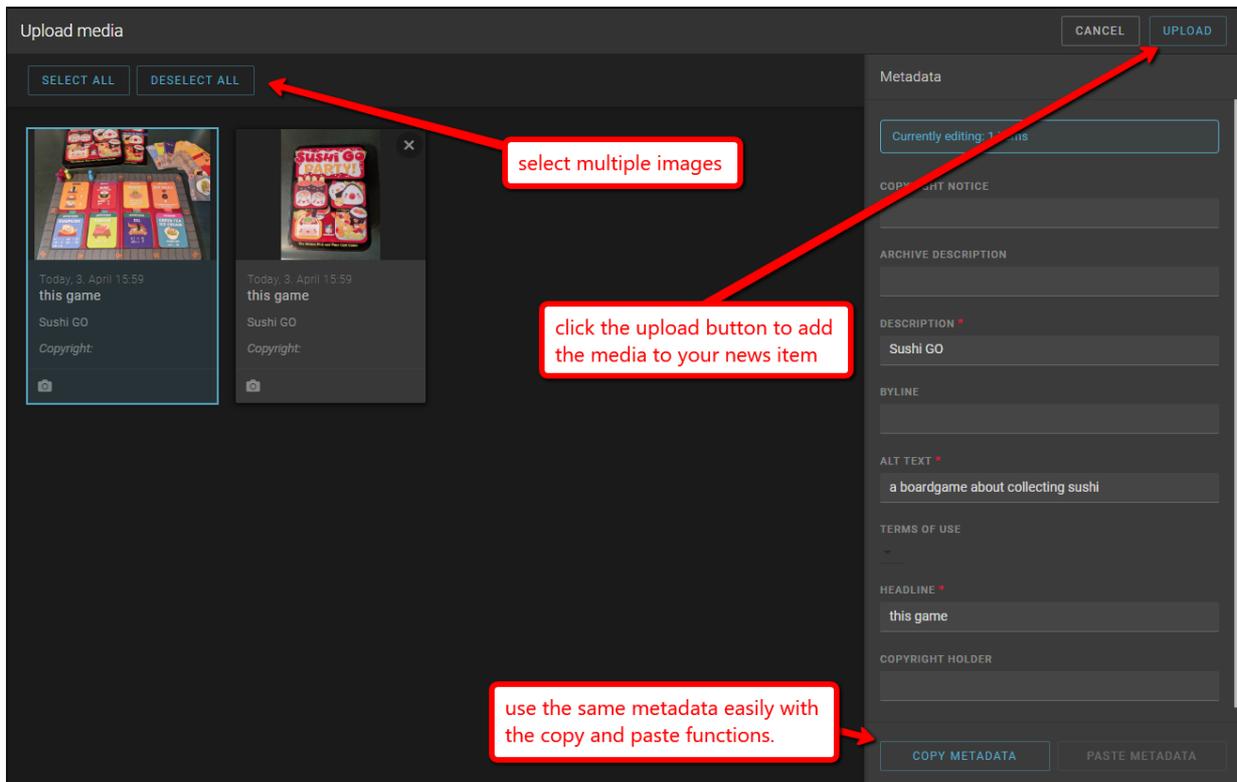


This button allows you to add media into the body text field.

Clicking on the media icon at the top of the Body text field will prompt you to upload a media item from your computer. You can select multiple media items to upload at the same time.



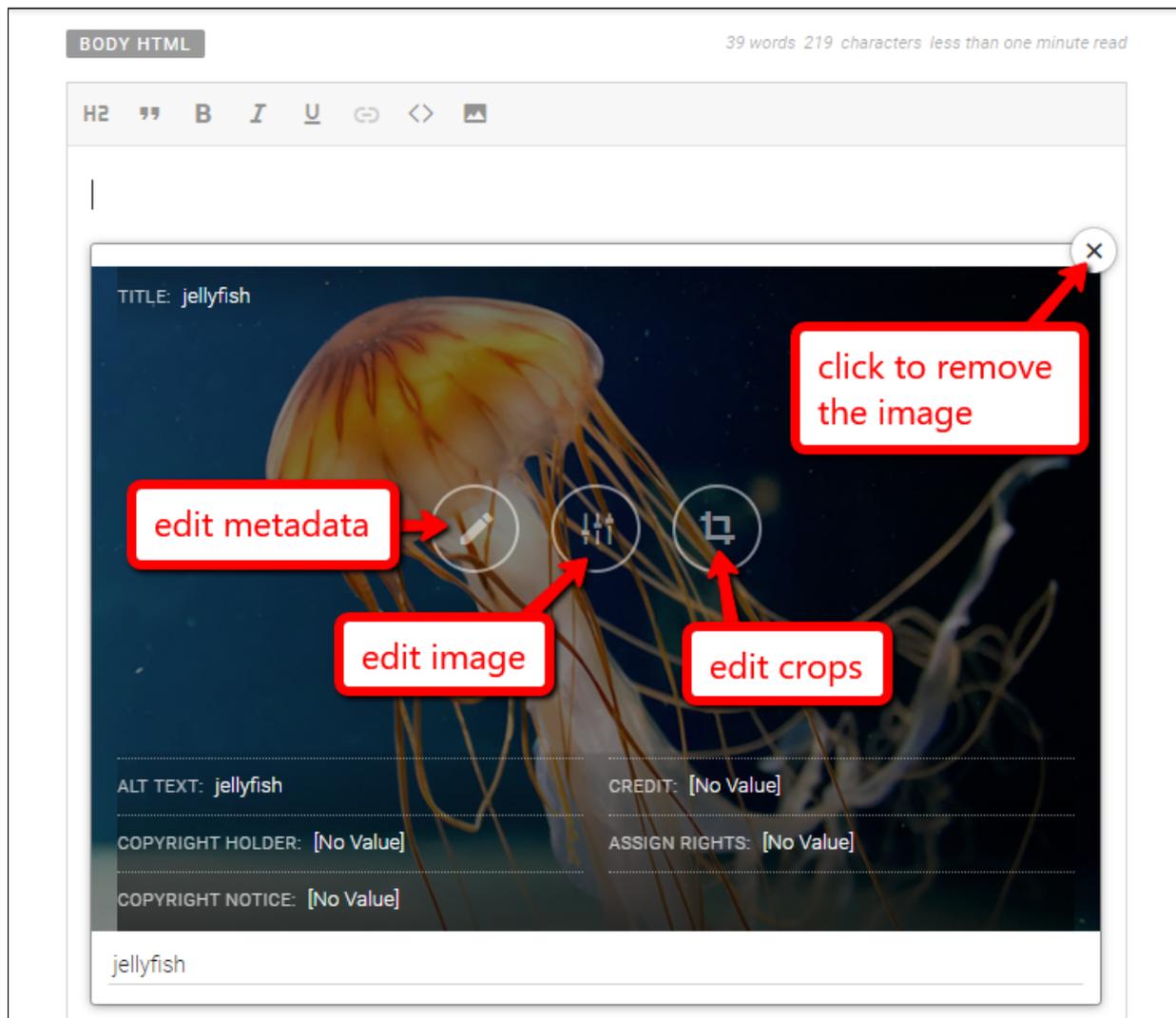
You might need to enter a title, description or headline for your media. Necessary fields are marked by a red star. If you have selected multiple pieces of media to upload at the same time, you can add the same metadata for all the media items using the SELECT ALL button at the top of the Upload Media pane, or you can enter custom metadata for each item by clicking on each item one at a time.



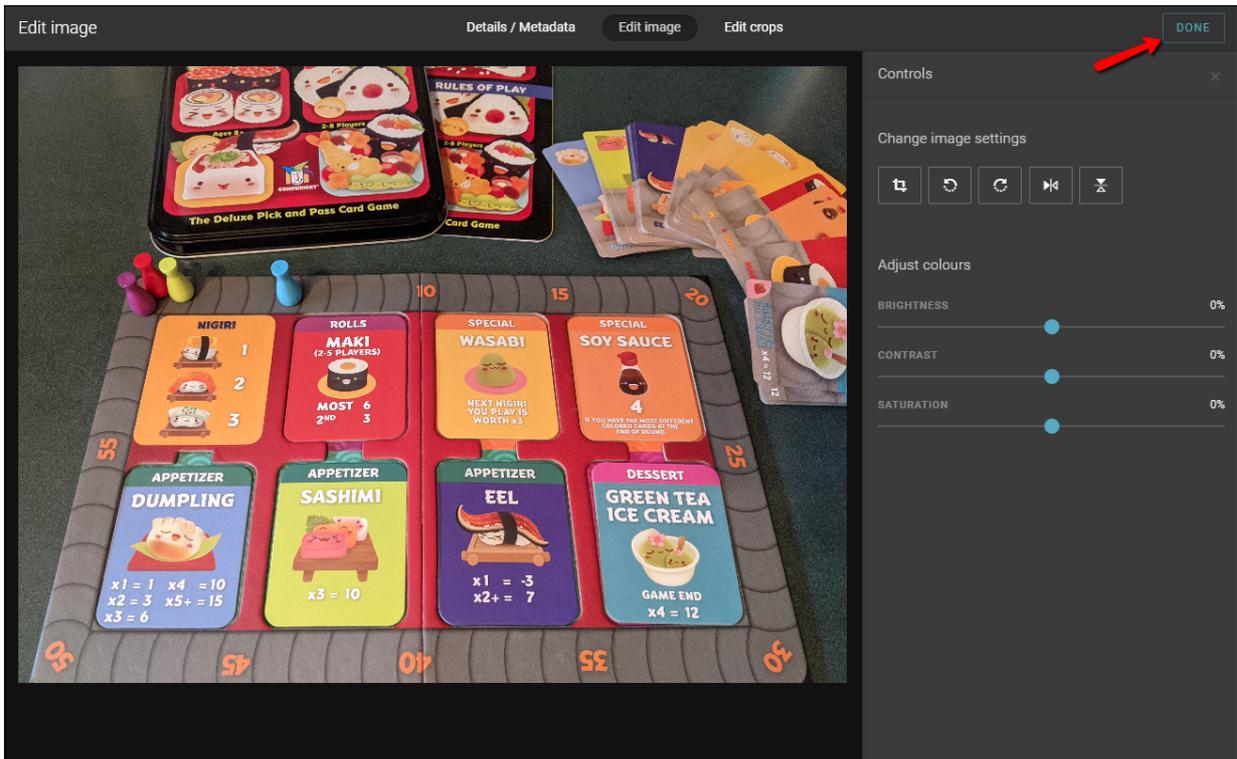
Click the *Upload* button in the top right corner of the pane to insert your selected media. You will be prompted to edit the image by rotating, adjusting crops, brightness etc. All these options are explained in further detail below. Be sure to click the DONE button in the top right corner to insert your media.

The media upload is not limited to photos. It is also possible to upload audio and video if your publishing destinations support it.

In the Editor, if you have inserted a photo, you can click on the photo in the body of the article in order to edit it. Click the 'x' that appears in the top right corner when you mouse-over the image in order to remove it.

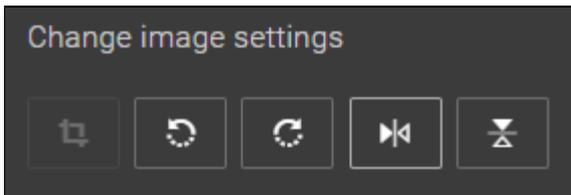


Regardless of which button you click to edit the image, all three options will still be accessible to you in the image editing interface. In the image editor, you will see three buttons at the top of the pane: **Details / Metadata**, **Edit Image** and **Edit Crops**.



Clicking the **Details / Metadata** button will allow you to change any of the text associated with the image.

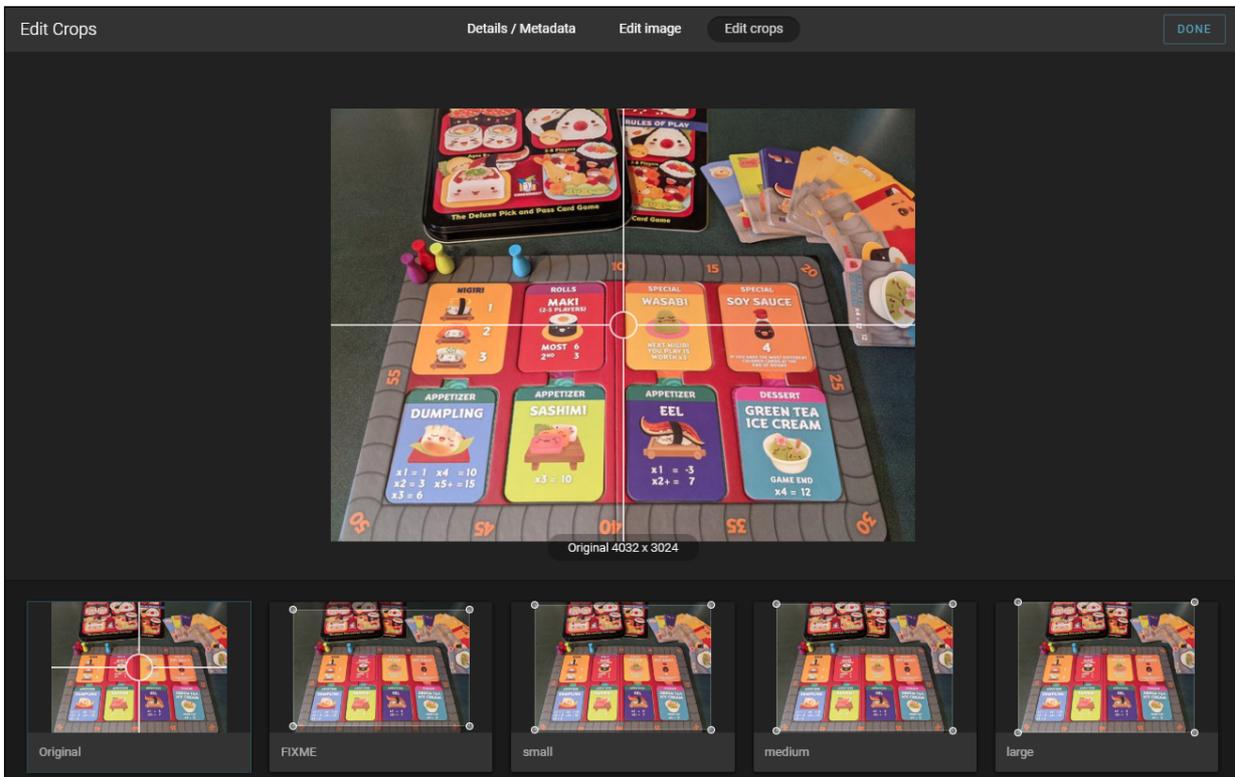
Using the **Edit Image** button, you can crop the image, rotate left, rotate right, flip it vertically, or flip it horizontally.



You can also adjust the brightness, contrast and saturation of the image using the toggles pictured below.



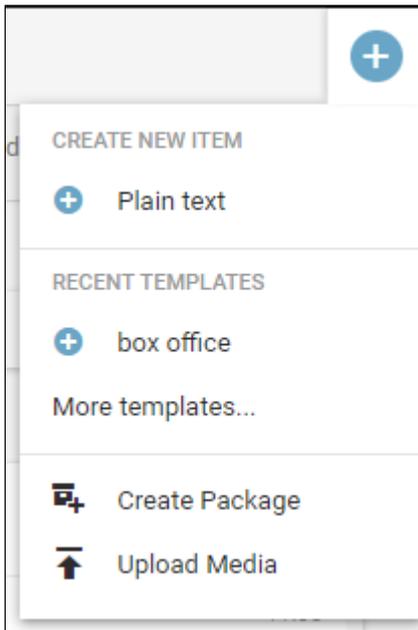
If you selected the crop button, you can crop the photo by clicking and dragging the edges in. Darkened areas will be cropped out of your photo. When you are satisfied with your cropping, click the *DONE* button in the top right to save your changes.



When you select the Edit **Crops** button at the top of the pane, you will be able to select from some predetermined image sizes. You can change the area of interest by moving the crosshairs on the image at the top.

Creating Packages

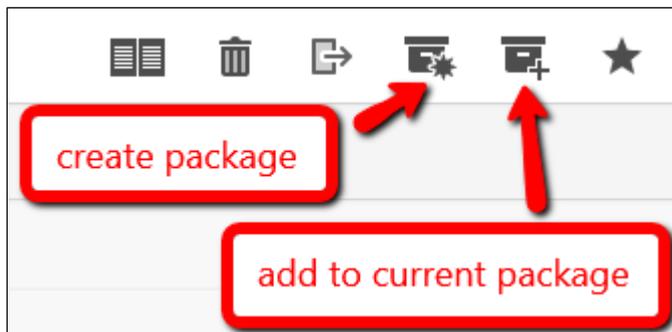
Packages are groupings of several news items. There are several ways to create a Package. You can create an empty package from the Create icon in the top right corner of the Monitoring Pane (or Custom Workspace), as in the screenshot below:



Creating a Package in this manner will produce an empty Package. You can add metadata to the header, just as you would with any other news item creation. Packages have their own metadata, independent of the metadata of their individual pieces.

<input checked="" type="checkbox"/>	6	JELLYFISH FOR EVERYONE Jellyfish DRAFT location: workspace
<input type="checkbox"/>	6	7 SLUGLINE GOES HERE. This is your Headline DRAFT location: workspace
<input type="checkbox"/>	6	7 SLUGLINE GOES HERE. This is your Headline DRAFT location: workspace
<input checked="" type="checkbox"/>	6	7 SLUGLINE GOES HERE. This is your Headline DRAFT location: workspace
<input checked="" type="checkbox"/>	6	1 WHERE DOES THIS GO where does this go DRAFT location: workspace

You can choose articles to add to your package from the Search or Monitoring tabs of the Workspace Panel. To add content to the package you've created, hover over the icons to the left of each article to turn them into checkboxes (as shown above). To add articles to the package that you have open, select articles by clicking the checkbox. 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 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 Items tab (Personal Space).

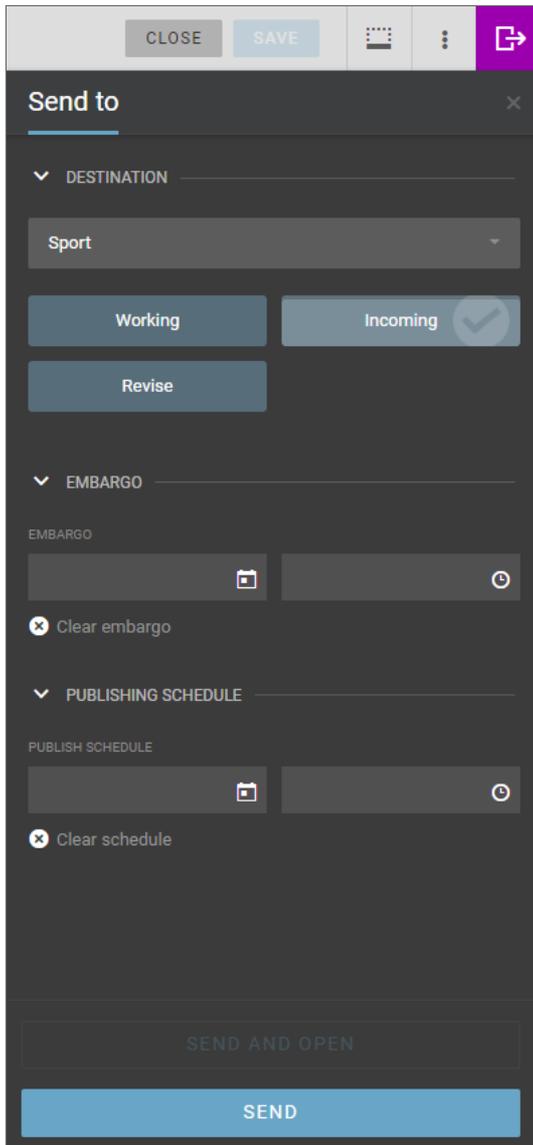
See the Packaging section in the Superdesk Manual for more ways to create packages here: [Packages](#).

Moving Items between Desks and Stages



This is the 'Send To' button.

If you created an article in your Personal Space, when you are satisfied with your article, you can choose to send it to a Desk to be reviewed by others by clicking the 'Send To' button in the top-right corner of the article editing window. If you created an article on a Desk, it will automatically be visible to others.



Depending on your user permissions, you can also send the news item for publishing using the 'Send To' button in the article editing window.

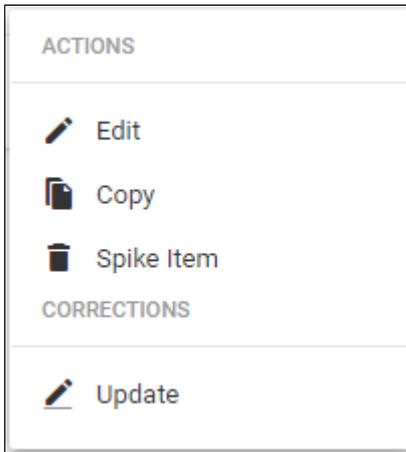
If you are not ready to send it to publishing or to a Desk, you can click the blue *SAVE* button in the top-right corner of the article editing window, *then* click *CLOSE* to revisit the article at a later time.

Editing and Re-opening Existing Items

You will find item list views in the Monitoring pane, Search pane, or in your Personal Space tab. Mousing over any item in a listview will reveal an Action menu on the item's right.

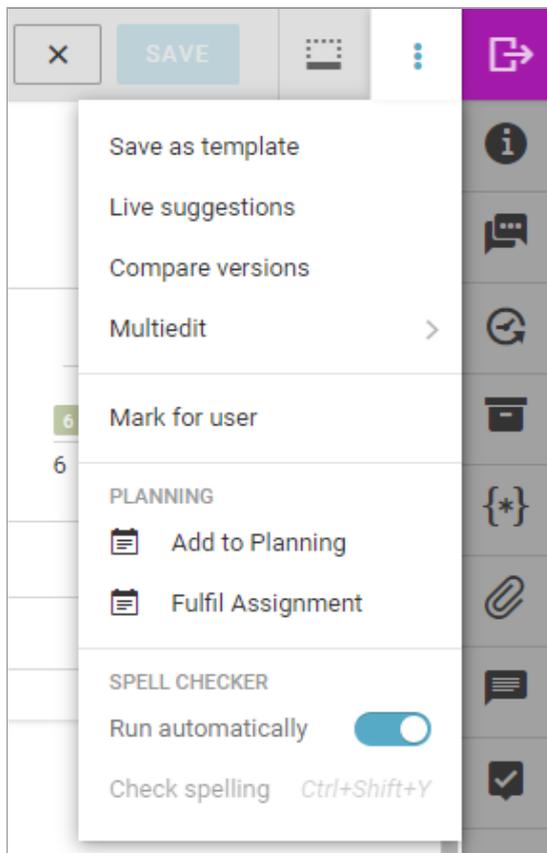


This is an Action menu.



When you wish to continue writing your article, hover over it, click the Action menu in the list view and then select *Edit*. (Note that the items that are available in an action menu will depend on the news item's current status, your permissions and whether you have the planning component as part of your Superdesk instance.)

Once the item is opened for editing, you will see several icons along the top of the editing pane.



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



Minimise icon.

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

The second icon is an Action menu. Selecting it opens a pop-up menu with options to save the formatting as a template, open the item in the Multi-edit side-by-side editing mode, run a spell check, etc. Dictionaries for your spell check can be set up in the settings section of the Hamburger menu in the top-left corner of the Superdesk interface. In this action menu you can find the Multiedit option, which allows you to have more than one article open side by side. Selecting the Multiedit option will make the article available to be viewed in the Multiedit mode. Multiedit mode can also be accessed from the Monitoring tab by selecting multiple articles using the checkboxes and then clicking the Multiedit button in the top-right corner.



This is the *Send to* button.

The third icon is the *Send to* button. It allows you to send your article to a particular Desk, Stage or to publish it, depending on your user permissions.

Editor Sidebar

The Editor Sidebar provides additional options for items that are opened for editing. Note that different items might appear in your Editor Sidebar, depending on which Content Profile you are using.



This is the Editor Sidebar.

When a tab in the Editor Sidebar is open, the icon will be blue. To close the tab, mouse over the blue icon, and it will turn into an 'x'. Click the 'x' to close the tab.

Info Button

Below the 'Send to' button you'll find the Editor Sidebar. The first button below the 'Send to' button is the Info button.



The *Info* button allows you to add metadata to your article, view the article expiry, and change the unique name for your article.

Metadata

NOT FOR PUBLICATION

LEGAL

USAGE TERMS write notes here

LANGUAGE en ▾

PUBSTATUS usable

STATE FETCHED

INGEST PROVIDER Reuters Top News

PROVIDER SEQUENCE 20

URGENCY 3

PRIORITY 6

WORD COUNT 3

SOURCE Reuters Top News

TAKE KEY

SERVICE FIXME1

GENRE Article (news)

DATELINE

BYLINE

SIGN-OFF ZEZ

In the Metadata tab of the Editor Sidebar, you will find the following:

Not for Publication: A flag that when switched on will appear beside the slugline in the article entries window. This flag lets users know that the article is not fit for publication. Any attempt to publish an item that is flagged with Not for Publication will result in failure until the flag is

purposefully switched off. Occasionally the articles that are marked Not for Publication are used internally for briefings or for content which shouldn't be included in the editorial system.

Legal: A flag that when switched on appears beside the slugline in the article entry window. This flag lets users know that the article contains legally sensitive information, requires extra caution and needs to be reviewed before being published. Unlike the Not for Publication flag, the Legal flag will not prevent the story from being published.

Usage terms: A field for notes about publishing conditions. These terms can be inherited from the Ingest source or edited within Superdesk.

Language: A place for entering a language code. This could be inherited by the Ingest Source or set locally. This language code determines the dictionary and abbreviations dictionary will be applied to the item.

PubStatus: Usable or Unusable. Stories that have the pubstatus set to unusable should be killed and deleted.

State: Displays all the current article status flags, for example: legal, fetched, not for publication, takes, corrected, published, etc.

Expiry: Desks can optionally have an auto-expiry set up. This line tells you when the article expires. When an article expires, it gets deleted and you can no longer edit or publish it.

GulD: This field provides a unique global identifier for your item. It cannot be changed or edited.

Unique Name: Each item is assigned a unique number in this line, based on its GulD, but you can change the unique name to a more intuitive, easily searchable string. It is possible to search by Unique Name in the Advanced Search pane.

Note that 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, as shown below:



In the info tab of the Editor Sidebar, you will also find data about version, source, urgency, genre, type, and when the article was last updated.

Find and Replace



The Find and Replace feature allows you to locate and update specific words and phrases. It can be a great time-saving feature for editors and journalists.

A screenshot of the 'Find and Replace' dialog box. The title bar reads 'Find and Replace'. Below the title bar, there are two text input fields: the first is labeled 'FIND' and the second is labeled 'REPLACE WITH'. Below these fields is a 'CASE SENSITIVE' toggle switch, which is currently turned on. At the bottom of the dialog, there are four buttons: 'REPLACE', 'REPLACE ALL', a left arrow, and a right arrow. A 'DONE' button is located at the very bottom of the dialog.

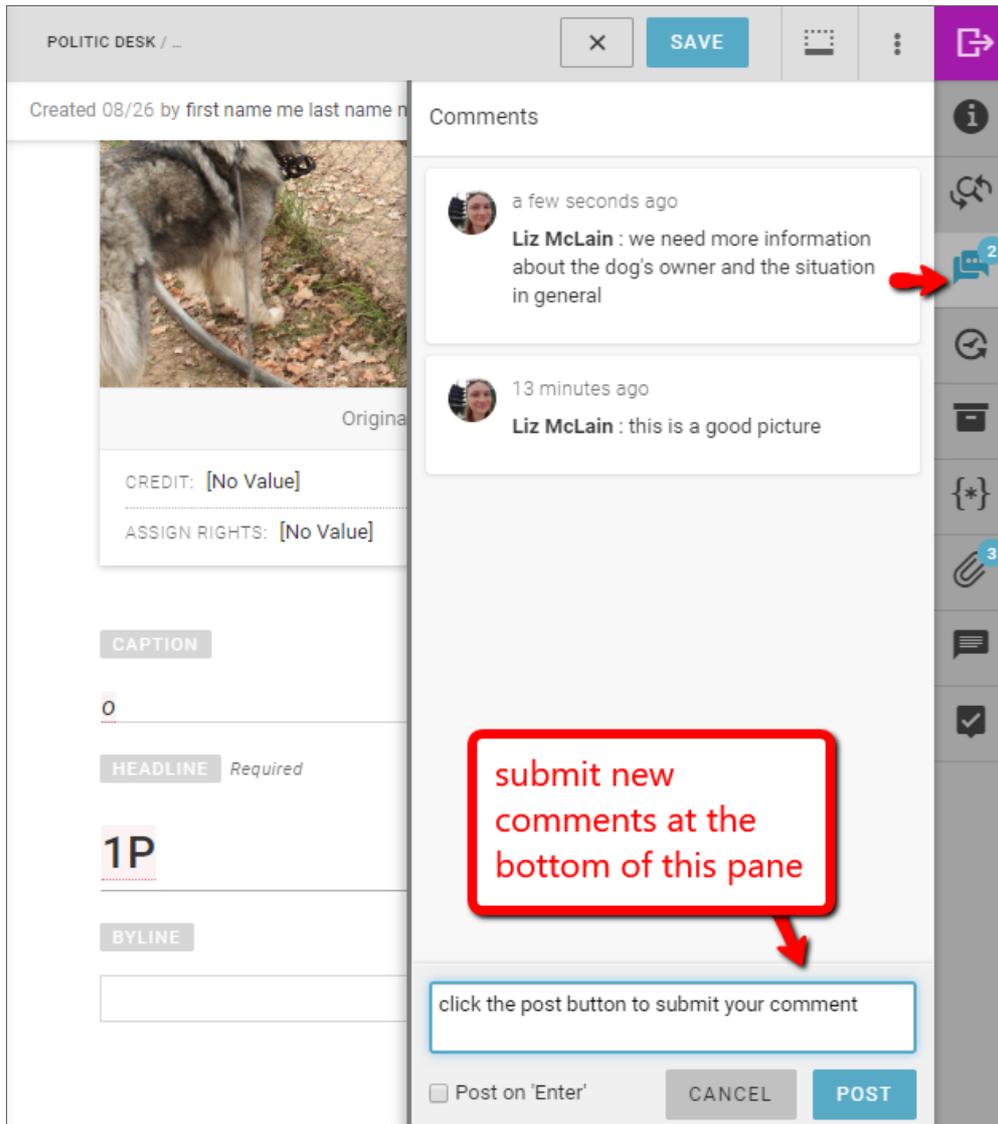
Type the word you wish to adjust in the *FIND* text box, then type your new word in the *REPLACE WITH* textbox. The *REPLACE ALL* button will replace every instance of the word with what you put in the *REPLACE WITH* textbox. You can also replace them one at a time with the *REPLACE* button, instead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

Comments



Clicking on the Comments icon allows you to have general discussions about the news item's content with other users. Note that these Comments are different from the Inline Comments feature. [Inline Comments](#) are used in the Body HTML field to make specific comments about parts of the news item's content and can be found in the Inline Comments tab of the Editor Sidebar.

This Comments tab is designed for more general types of discussions.

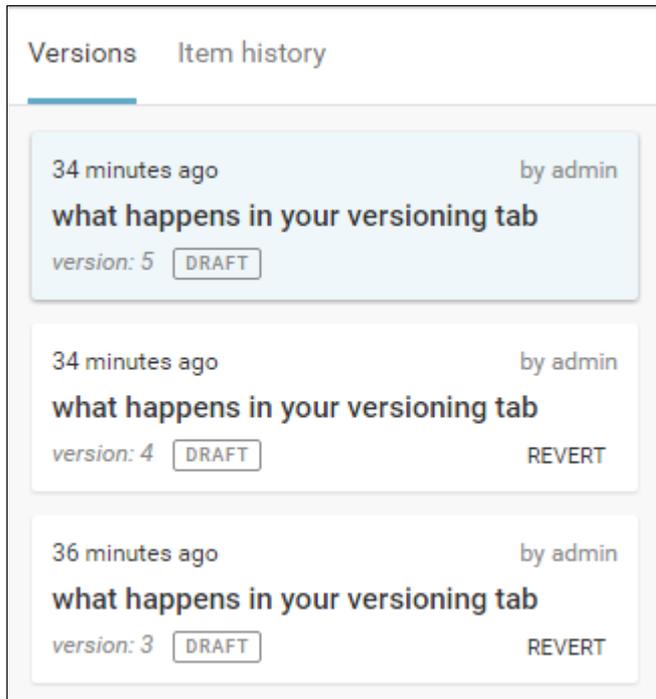


The number of new comments is shown in the info bubble. New comments can be added at the bottom of this Comments pane. Type your comment in the textbox, then click the POST button.

Versioning



If you are writing and editing your article over multiple sessions, every time you save your article, Superdesk will retain a copy. In addition to user initiated saves, Superdesk will perform an autosave after you stop typing for 3 seconds. You will see the most recent autosave in your Versions tab in addition to your previous saves.



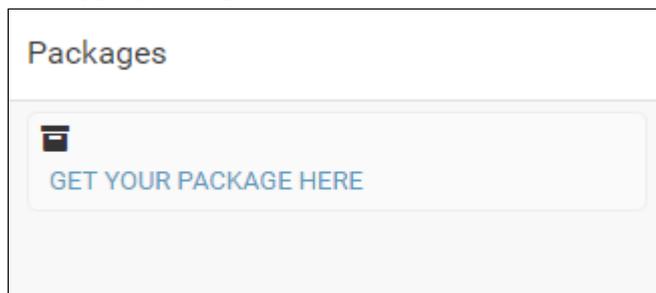
You can access previous versions in your versioning tab. Clicking *REVERT* lets you continue writing from a previous version, while still preserving all the other versions as well.

The Item History tab will let you see who created the item, when the item was updated and by whom.

Packages Info



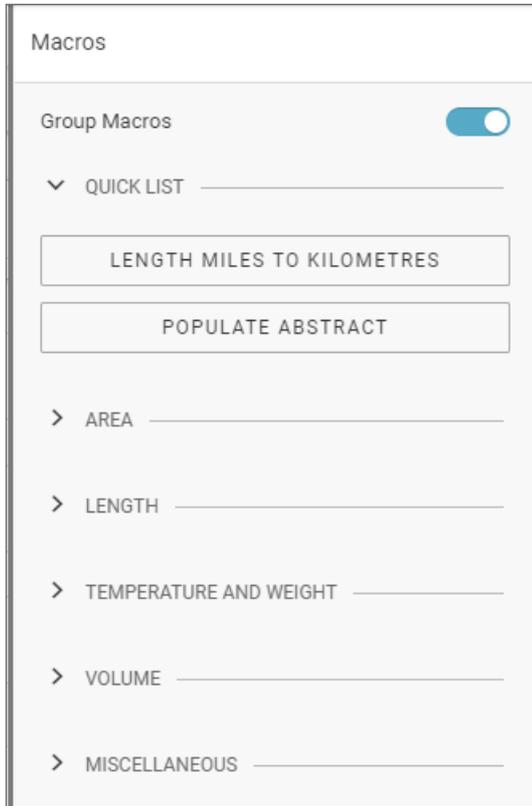
Clicking on the Packages tab in the Editor Sidebar will let you know if the item that is currently open is part of any packages. If the article you selected belongs to any packages, a link to the packages will be displayed here, along with the date and time that it was added to the package. In the example below, the headline of the package that the item is a part of it 'GET YOUR PACKAGE HERE'. Clicking on the package will allow you to view the Package, or edit it, if you have the appropriate permissions.



Macros



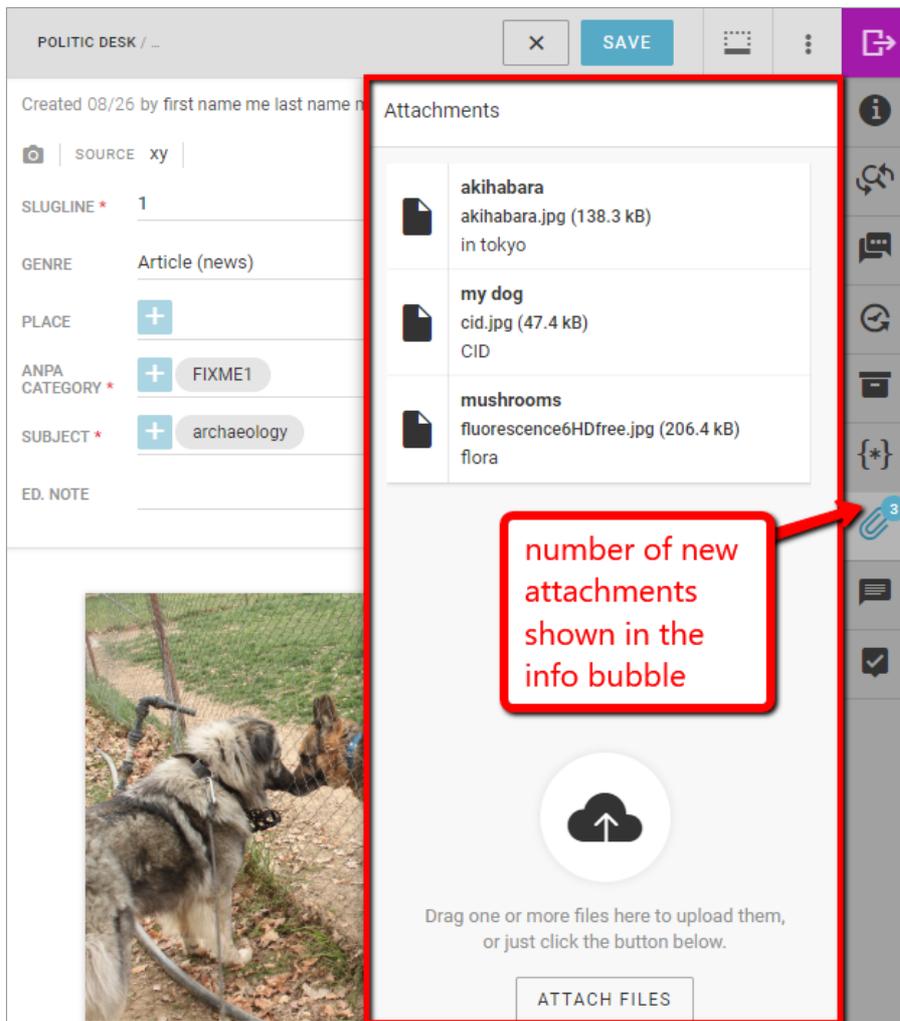
While Macros are created in the backend of Superdesk, you can view the macros and apply them here. Macros can be grouped using the toggle at the top of the tab to help you find the one you're looking for faster.



Attachments



The attachments tab allows you to add files, and view files that are attached to the news item. Clicking on the attachments tab will open a new pane, from which you can add new attachments.



Click the ATTACH FILES button to upload new attachments. Clicking on the ATTACH FILES button will open a new pane from which you can select files to upload. Note that these attachments can be Superdesk internal, or published with the news item. Use the toggle on the Attach Files pane to set this parameter:

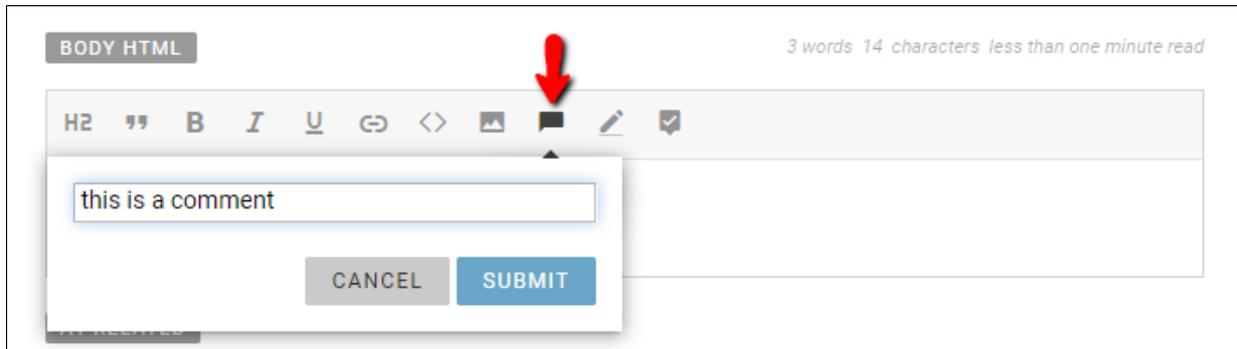


You may also need to add a title and description for your attachment. Depending on your Superdesk settings, there may be a size restriction for uploaded files.

Inline Comments



This tab allows you to view the Inline Comments that have been submitted for this item. These Inline comments are not transmitted in publication but will remain associated with an article even if it is sent to another desk, or published.



To add Inline Comments, highlight text in the Body Html textbox when you are creating a news item. Select the Comments icon in the toolbar above them in the text box, then click the blue *SUBMIT* button.

If you want to make sure that your Comments are read by a specific user, you can type their @username in the comment feature to send them a notification. Comments are not transmitted on publication, they are for workflow/newsroom use only. Editor's notes field in the metadata header should instead be used for information to be transmitted with the content beyond publication, for third-party/client editorial teams. [Read more about using the Comments feature.](#)

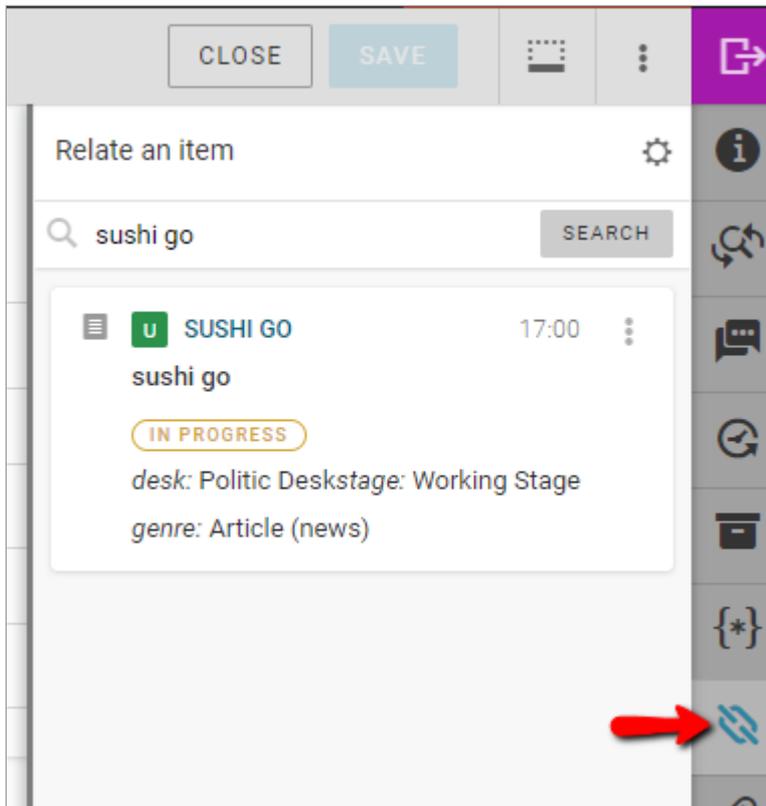
Related Items



The *Related Items* tab allows you to view items that share the same slugline or keywords. In the Related Items tab, you can also relate news items together. In the Superdesk backend, the Related Items tab can be configured to allow fields other than the slugline to be used to relate items.

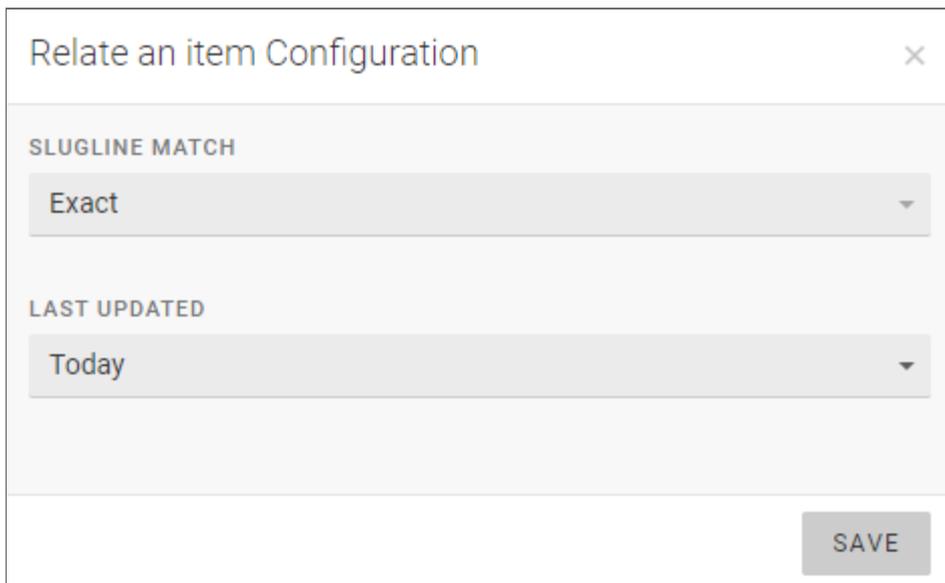
Once you click on the Related Items icon in the Editor Sidebar, you can type keywords into the search bar of the Related Items pane to generate a list of items that share the same slugline (or other configured field).

Note that the Related Items tab only displays while you edit *text* items, not packages or media.



Clicking on the action menu of an item in the Related Items tab will allow you to open the item, associate the metadata for the items, or associate the item as an update.

The gear icon in the Related Items pane allows you to configure complete or partial matches of the sluglines, as well as limiting the recency of the articles.

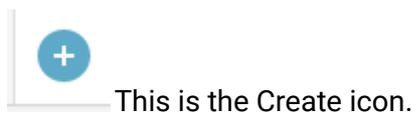


If an item in the Related Items tab is locked, you will see that information in the Related Items tab.

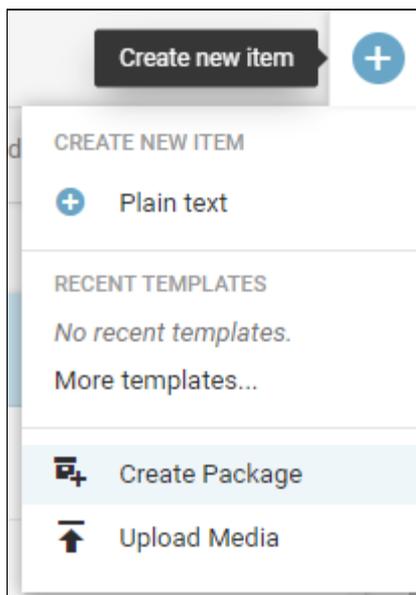
Packages

A Package is a container consisting of various news items, sometimes you might pair plain text items and image(s) or you might group several related articles together to be published as one. Packages have their own metadata, independent of the metadata of its individual news items. There are several ways to create a package.

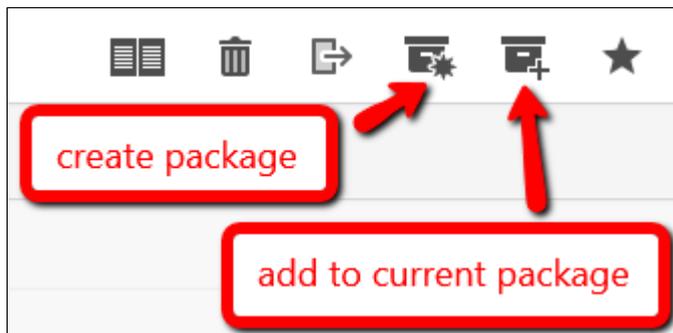
Creating an empty Package



Users can create a package by clicking on the Create icon in the top-right corner of the Monitoring pane.



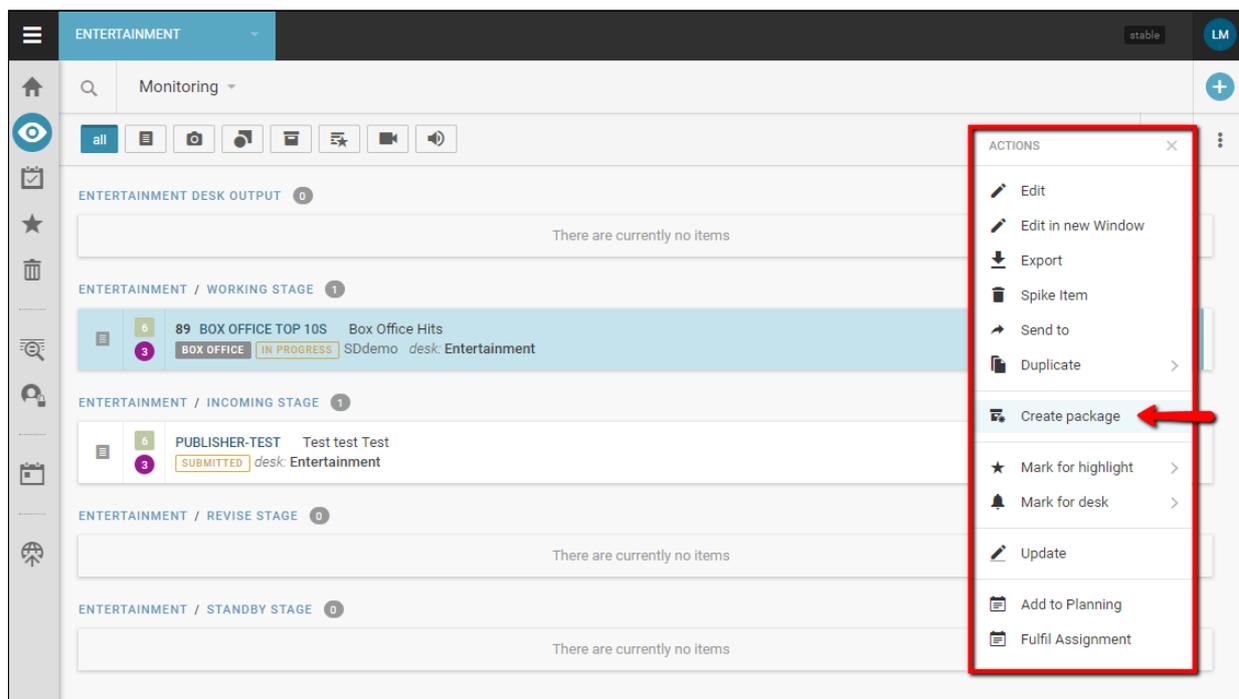
Clicking on the Create icon will open a drop-down menu from which you can select the 'Create Package' option. (Note that Content Profile names in your Superdesk instance may vary from those in the screenshot above.) Packages have their own metadata, independent of the metadata in its individual pieces.



While this empty Package is still open, you can add news items to it by selecting articles from any article list window (such as the Monitoring pane, or Search pane) and clicking the *Add to Current Package* button at the top of the window.

Creating a Package from a single item

In the Monitoring tab or Search tab of the Workspace Panel, users can choose a news item to start creating a new package from by clicking on the item’s Action menu icon. From the menu that pops up, you can select *Create Package*.



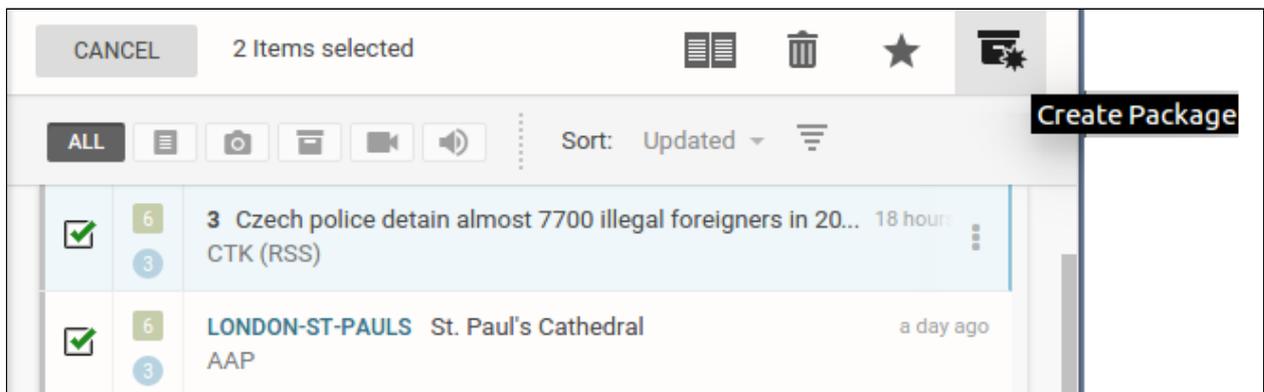
This will create a package containing the original news item and the item’s headline is copied to the package headline.



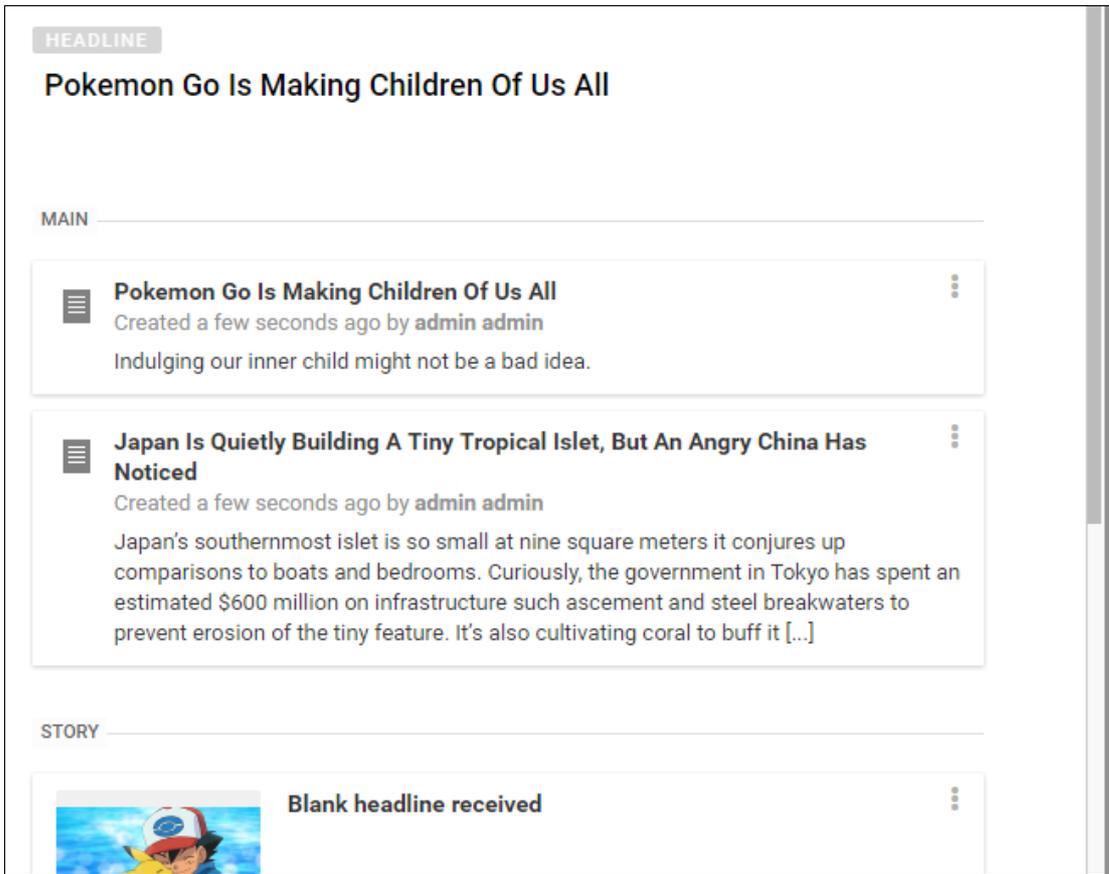
You can also click the Create Package icon which appears once you select the checkbox beside an item (see *Creating a package from multiple items*).

Creating a Package from multiple items

In any list view (for example the Monitoring tab or Search tab of the Workspace Panel), users can select multiple items by hovering over the item's icon on the left side of the article entry, which turns into a checkbox. Check off the boxes of the desired items, and click on the Create Package icon in the top-right corner of the window to create a package with these items in it. If you are creating a package from the Search tab, note that you cannot use Ingested articles to create a package. Articles must be fetched to a Desk before they can be added to a package.

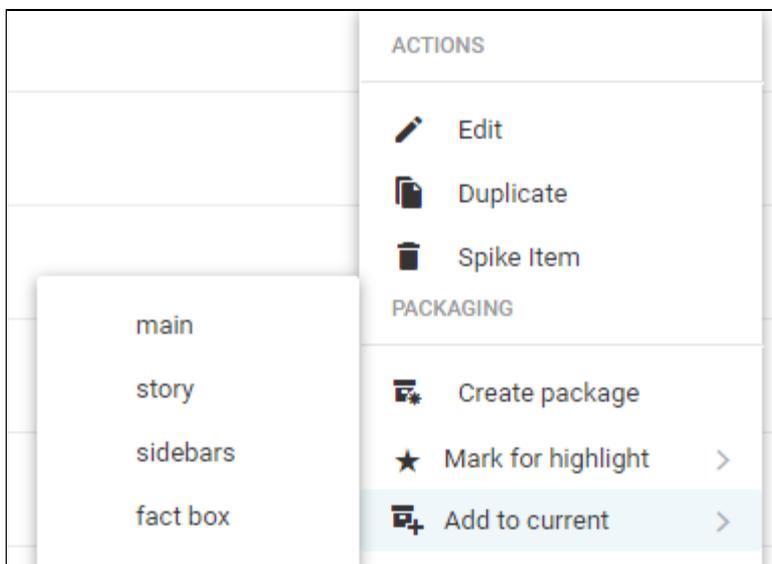


A new Package is then created with empty metadata but a copy of the headline from the first item you selected.



Adding items to an Existing Package

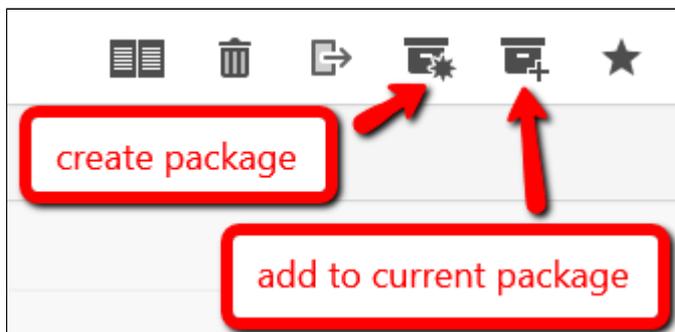
While working on the package (i.e. having it open) users can add more news items to it.



A *single item* can be added to a Package by clicking on the item's Action menu and selecting the *Add to current* option and then choosing whether it should be featured as main, story, sidebars or fact box. If you create a Package and add items to it one at a time, the headline does not automatically get filled in.

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 reason that an item cannot be added to a package are: if it is killed, or it is an ingested item that has not yet been fetched to a desk.

Packages Tab in the Editor Sidebar

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

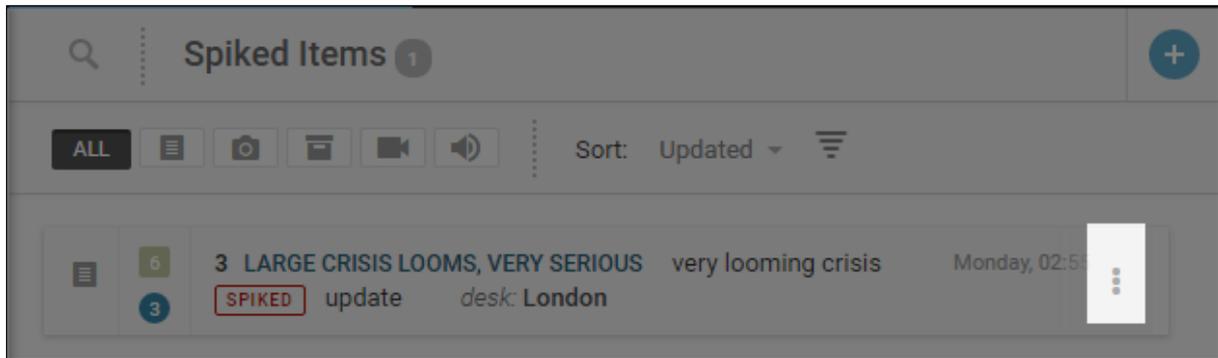
The screenshot displays the Superdesk workspace interface. At the top, there are buttons for 'CLOSE' and 'SAVE', along with icons for grid, list, and menu. The main area is divided into two panels. The left panel shows the 'WORLD NEWS / PRODUCER' header and metadata for a news item: 'Created 2 months ago by Admin Boss', 'Modified 2 m', '480 WORDS', 'SOURCE aap', and 'RELATED 0'. Below this, the 'SLUGLINE' is 'JAKARTA-BANTLEMAN', 'GENRE' is 'Article (news)', 'PLACE' is 'ASIA', 'CATEGORY' is 'Australian Weather', and 'SUBJECT' has a plus sign. The 'ED. NOTE' mentions 'Images are available http://www.cpimag'. The right panel is titled 'Packages' and contains a 'HEADLINE' field. A vertical toolbar on the far right includes icons for information, undo, redo, refresh, trash, and other actions. Below the editor, a preview of the article is shown with the headline 'Neil Bantleman's acqui Indonesia' and an abstract starting with 'The family of a Canadian schoolteacher... after the Indonesian Supreme Court over Bantleman and sentenced him to 11 year'.

Spiked Items

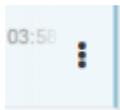
Spiked items are articles and news items that have been removed from the current Desk's workflow. Note that spiking an item is different from killing an article. (Published articles cannot be spiked, but must be killed instead). Spiking an item is reversible, unless you are spiking an item from your Personal Space, in which case spiking an item will permanently remove it from Superdesk.



Spiked items from your Desk can be viewed by clicking on the Spike icon in the Workspace Panel. Each Desk has its own associated Spike tab.

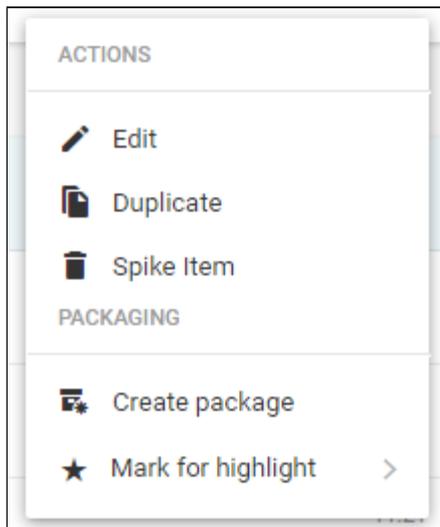


Items can be spiked from any list view, such as the Monitoring pane, your Custom Workspace, or your Personal Space, etc. Articles spiked from your Personal Space will never be shown in the Spiked Items tab, but rather permanently deleted.



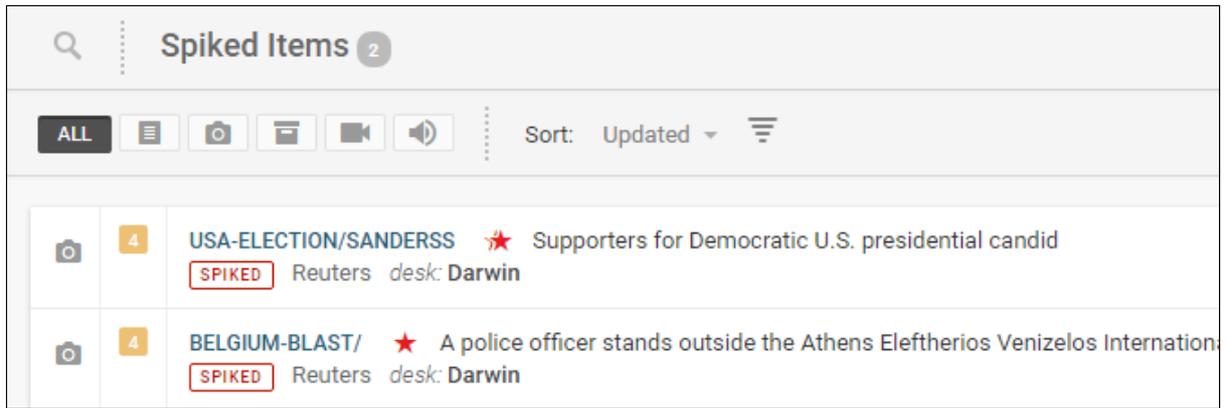
This is the Action menu.

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

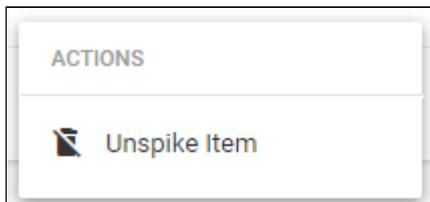


From the Action menu, select the *Spike Item* option. Items can be spiked from any Stage prior to publishing. (Note that published items cannot be spiked and must be killed instead.) Killing an item sends out notifications to all the content subscribers of the published article notifying them that the article is no longer fit for publication and has been recalled.

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 also cannot spike items that are currently open, or are locked by another user.



You can search through the spiked items using the article type filter buttons or by clicking on the search icon and typing keywords into the text box. Spiked items are desk-specific so you will only see items that have been spiked from your current Desk (as denoted by your Desks menu).



Spiking items from a Desk is not permanent. If you find an article that you wish to return to the desk workflow, 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 and Desk from which it was spiked.

Journalist Workflow Tools

As a reporter, you will likely spend most of your time creating and revising content within Desks or your Custom Workspace(s), in addition to 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 familiarise yourself with the following chapters:

- [What is Superdesk?](#)
- [Dashboards & Widgets](#)
- [Monitoring](#)
- [Superdesk Glossary](#)

When you click on *Select Workspace* (the Desks menu) in the upper-left corner beside the Hamburger menu, a drop-down list of desks you've been assigned to should appear. If you don't see any Desks in this menu, contact your administrator to set them up.

The Dashboard for each Desk will display widgets configured by your editor or admin. You can customise the Dashboard widgets on your Custom Workspace Dashboard.



The Monitoring View is a space where journalists or production staff can keep up-to-date on the content in each work Stages, create new items and move content between stages. The Monitoring View can also be set up to show Saved Searches. The content of the Monitoring View tab is set up by your desk administrator, in the Desks section of the Hamburger menu.

Content Workflow

To create a new news item, first make sure you're on the Desk where the item should be created. (You can check which Desk you are on by referencing the Desks menu at the top of the Superdesk interface). Alternatively, you can create a new item in your Personal Space if it's not intended to be shared right away.

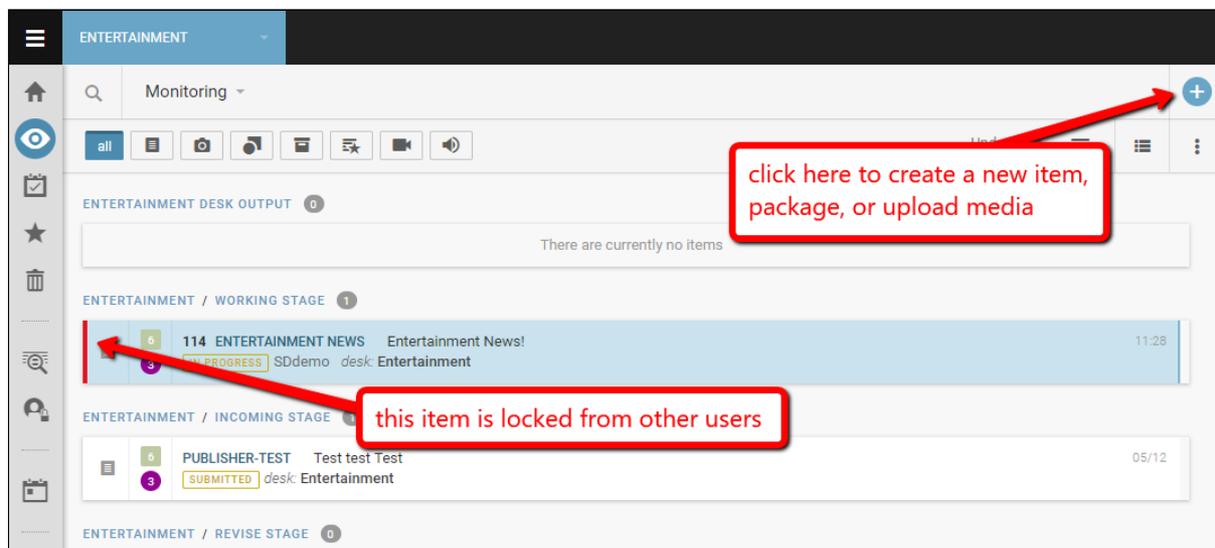
Click the *Monitoring* icon (second icon on the Workspace Panel) to enter the *Monitoring* workspace. Click the Create icon located in the upper-right corner of the Superdesk interface. Depending on which content profiles are assigned to your desk, the new items that you can create will vary.

To create an article, select a content profile or a template you'd like to create from. Once you enter metadata and some text, you can hit the *SAVE* button in the top-right corner to save it as a draft. Articles will be saved to the Desk you are currently working on. If you are working in a custom workspace, the article will be saved to the current user's default desk.



You can keep an article open but minimise it by clicking the *minimise* icon located beside the *SAVE* button at the top of the article editing pane.

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 Superdesk interface. If a user session hasn't been updated in four hours, the session is terminated and the lock is dropped. While you are editing an item, it is locked, preventing any other users from making changes to it. This is denoted by a red stripe that appears next to the article entry in the Monitoring tab.



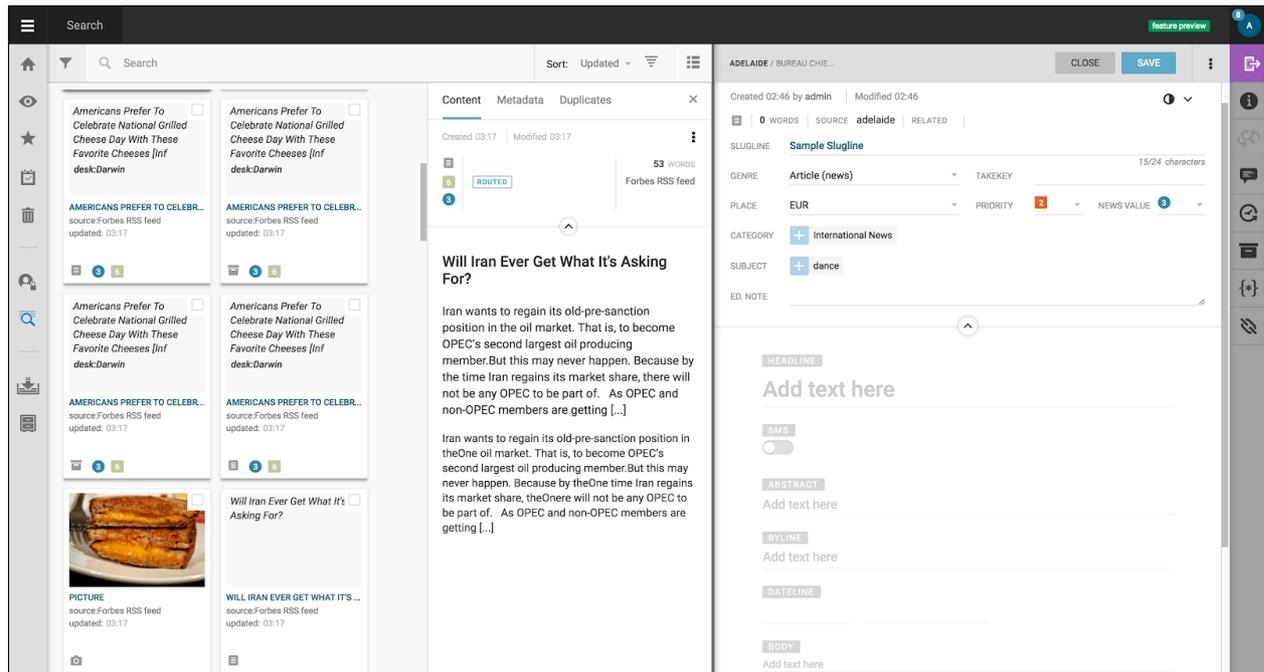
As you work, changes are autosaved both on the server and locally. If you lose internet connection, you can restore your work once a connection to the server is re-established, though there may be some issues if the file has been modified during the disconnection.

Research & Multi-Pane 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 administrator.

Superdesk's multi-pane 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.

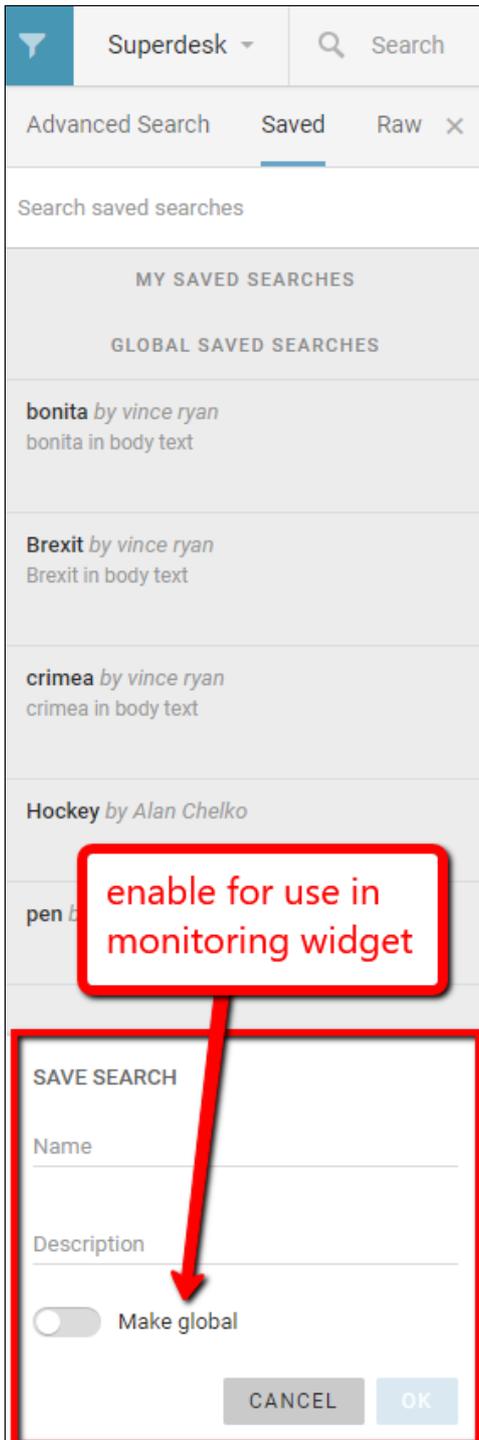


Monitoring Issues & Saved Searches

If you are interested in monitoring incoming RSS content and content being produced about a particular issue, you can set up a Monitoring widget in your Custom Workspace.

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 and perform the search, a blue button reading 'Save Search' appears at the bottom of the screen.

Make sure you turn on the Global Read toggle to make the Saved Search available for use in a Monitoring widget that is not in your Custom Workspace. Saved Searches do not need to be saved as a Global Read if you are only using it in your Custom Workspace.



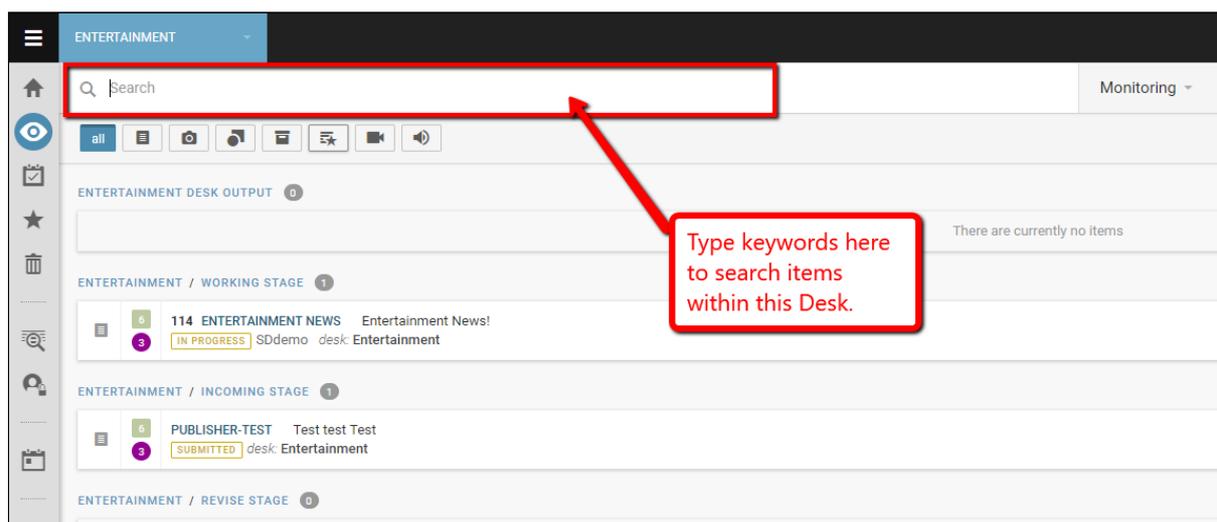
You should now see the Saved Search by clicking on the Saved tab of the Advanced Search panel. Note: If your search does not return any content, you can still save the search and be alerted when new content corresponding to the search comes into the system.

To set up a widget showing a Saved Search, click the house-shaped Dashboard icon on the Workspace Panel, and then click the blue *Create* button in the top-right corner to add a new widget. 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 on the Dashboard. 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 desk 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 using the search feature on the Monitoring view of the Desk.



From the Monitoring View, users can also use the Quick Search Filter from the Monitoring View (click the search icon in the top-left corner of the Monitoring pane). 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 an Action Menu will appear. Click the *Edit* option to open the item in a new pane.

Bundling Images and Text Items Together

There are several ways to bundle images and text together. You can create a package and insert both images and text items to the package. Alternatively, you can insert images into the main body of an article directly. Ask your Editor for which method of bundling they prefer. You can read about [creating Packages](#) and [inserting media in the body of an article](#) in other parts of this manual. You can also add images as [attachments](#) when an article is open for editing.

Sending Drafts



This is the Send to/Publish icon.

If you created an item in your Personal Space, when you are satisfied with your article, you can choose to send it to a Desk to be reviewed by others by clicking the *'Send to'* button in the top-right corner of the article editing window. If you created an article on a Desk, it will automatically be visible to others. Depending on your permissions, you may be able to send it to the publishing queue using the *Send to/Publish* button as well. If you are not ready to send it to publishing or to a Desk, you can click the *SAVE* button, *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 article editing window. A pop-up menu then appears with options to select the destination Desk and work stage (i.e. Bureau chief in, Bureau out, etc.) you'd like to submit to.

The screenshot shows the 'Send to' dialog box in Superdesk. At the top, there are buttons for 'CLOSE', 'SAVE', and a share icon. The dialog is titled 'Send to' and has a close button (X) in the top right corner. The main content is organized into sections:

- DESTINATION:** A dropdown menu is set to 'Sport'. Below it are three buttons: 'Working', 'Incoming' (which is selected and has a checkmark), and 'Revise'.
- EMBARGO:** This section includes two input fields for date and time, each with a calendar icon. Below these is a 'Clear embargo' button with an 'X' icon.
- PUBLISHING SCHEDULE:** Similar to the embargo section, it has date and time input fields and a 'Clear schedule' button.

At the bottom of the dialog, there are two buttons: 'SEND AND OPEN' and 'SEND'.

You will also use this 'Send to' button to move news items between States of a Desk. Stages are set up by your administrator and are used to organise items within a Desk. You can also use this pane to 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.**

The news items (or packages) can be sent to a different stage of the Desk (for sub-editing for example) or to another desk using this 'Send to' button. It can also be published. Publishing can be scheduled to a later time. Once Published items can only be updated or killed.

If new information has surfaced 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 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



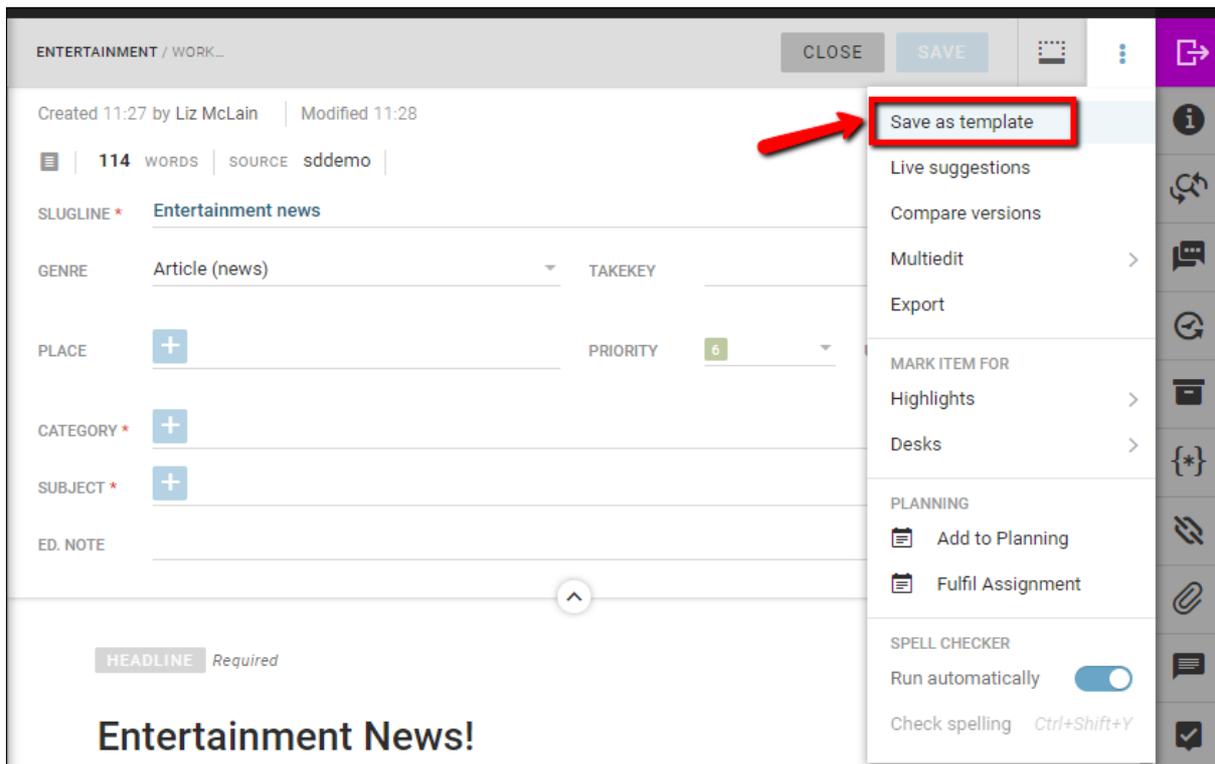
Spiking an item means marking it for removal from the Desk workflow (without actually deleting the information, in case it needs to be used in the future). To view all spiked items, click on the Spiked Items icon on the Workspace Panel.

To Spike an item, click on the Action menu of the article and select *Spike Item*. Note that published items cannot be Spiked. Items that are spiked from your Personal Space are permanently deleted.

Other Useful Features & Tools

Templates

A time-saving feature for journalists, the templates feature enables users to save any article with a complete copy with all its metadata by clicking on the Action menu at the top of the article editing window and selecting 'Save as *template*'.



When selecting the 'Save as Template' option, a new window then opens up prompting users to name the template and assign it to a Desk.

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



This is the Multiedit button.

You will see the Multiedit button at the top of the article editing window. The *Multiedit* button allows you to toggle between multiple open content items, as well as to display two news items side-by-side in editing mode. You can enable the Multiedit mode for an article in the action menu at the top of the article editing window. You will find the Multiedit button at the top of the article list. You can select up to 12 articles to open in Multiedit mode at the same time.

Highlights



The Highlight icon located on the Workspace Panel allows you to view Highlight lists. Highlight lists are most commonly used for content indexes, top-10 lists, section features and all manner of user-curated lists. Highlights can be generated automatically against user-defined metadata, or set up for manual curation. Highlight lists can be scheduled for publication or distribution. Most journalists will not have permission to add items to a Highlight list.

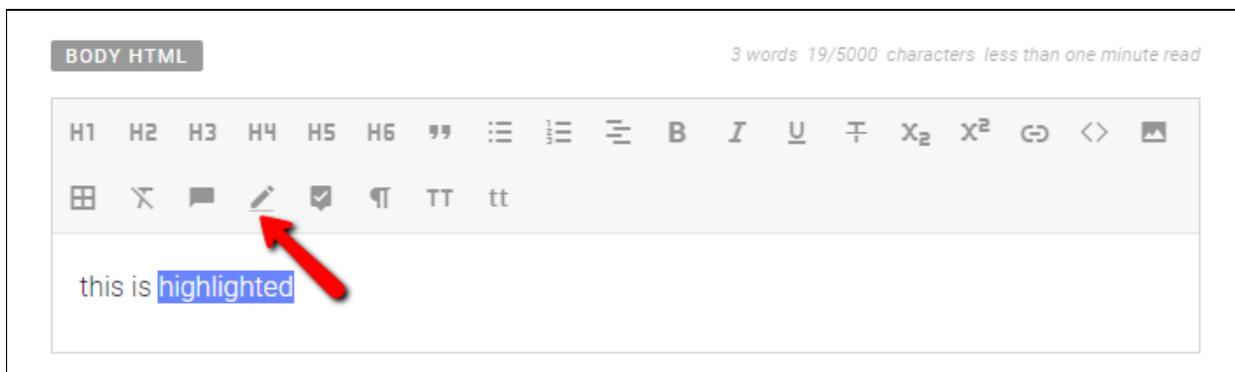
Versioning



While an item is open for editing, you can click the *Versioning* icon located in the Editor Sidebar on the right-hand side of the article editing pane to display previous saves or revert back to earlier versions of a content item.

Annotations

Annotations are a useful Superdesk feature that allows journalists to add additional information to their articles. Annotations are specially designed for information that is often appended to specific text items. Annotations can either be created in the Hamburger menu, within the Annotations Library, or within the editor while creating an article.



To add an annotation to text in the body of your article, highlight the text and click the annotations button. [Read more about Annotations.](#)

Custom Workspaces and Personal Space

Custom Workspaces are configurable individual workspaces accessible from the Desks menu. Custom Workspaces have their own Dashboards and Monitoring tabs, which make it possible to monitor several Desks in one place so they are ideal for users that are working on more than one Desk.

Customising your Custom Workspace Dashboard is a great way to monitor several projects in one spot, without having to click back and forth between Desks. Only you can access your Custom Workspaces, so you can customise your Custom Workspace Dashboard and Custom Workspace Monitoring tab to suit your individual workflow. Dashboard of Desks have widgets that are determined by the Desk manager.



Personal Space is an icon located on the Workspace Panel.

Clicking on this icon in the Workspace Panel displays all the articles and items you have created in your Personal Space. Only you can view or edit items in your Personal Space. To create a new Personal Item, click the Create icon in the top-right corner of the Personal Space. You can send your Personal Items to a Desk workflow using the purple 'Send to' button in the article editing window.

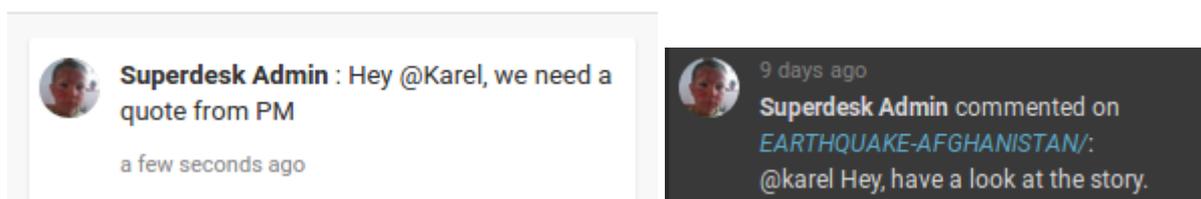
User Profile Settings

To view and adjust any of your profile settings, click on your user icon 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 and contact information, view your privileges and view your activity stream. User privileges are set by administrators.

Comments

When an article is open for editing, users can add Comments to each news item with Twitter-like @mentions.

Comments



The screenshot shows two comment cards. The first card is white and contains a profile picture of a man, the text "Superdesk Admin : Hey @Karel, we need a quote from PM", and "a few seconds ago". The second card is dark grey and contains the same profile picture, the text "9 days ago", "Superdesk Admin commented on EARTHQUAKE-AFGHANISTAN:", and "@karel Hey, have a look at the story."

This feature is useful for alerting other Desks or users to the content in a hurry.



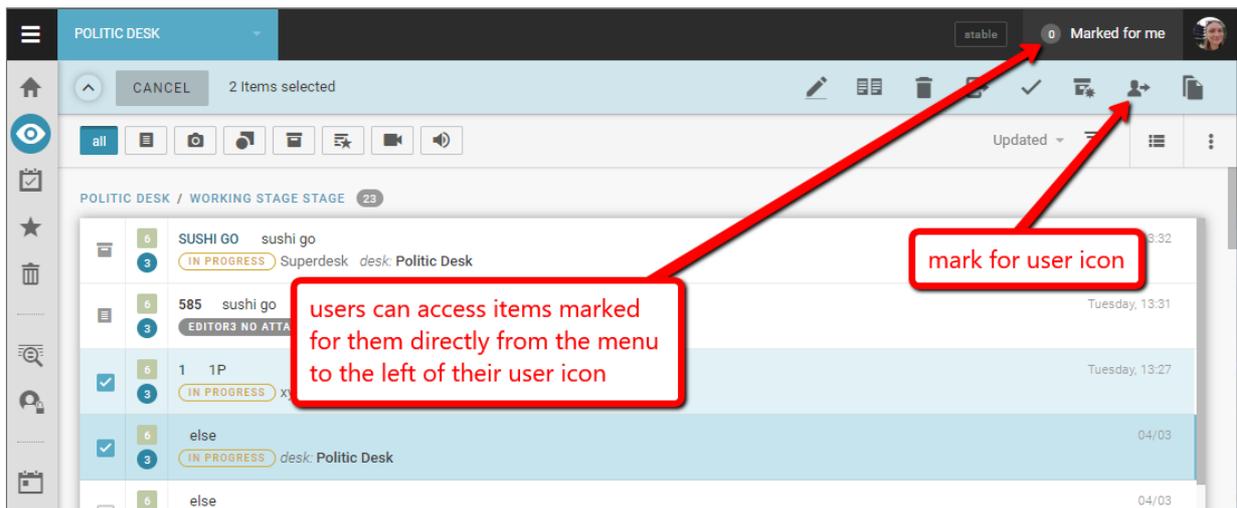
This is the Comments button in the Editor Sidebar.

Comments can be viewed in the Editor Sidebar, when an article is open for editing, using the Comments button displayed above. These Comments can be used for general feedback about the news item. Inline Comments can also be added to the Body of a news item using the [Inline Comments feature](#). Inline Comments can be used to reference specific parts of the text.

Mark for User

As of Superdesk version 1.33, Superdesk now includes a 'Mark for User' feature. This allows users to keep track of news items that require their attention. News items can be marked for users in several ways:

- From the action menu of an item in any list view (such as Monitoring or Highlights).
- From the action menu of an item in the Editor or Preview pane.
- Using the icons at the top of the Monitoring pane if multiple items are selected.



Users can access items that are marked for them directly from the menu to the left of their user icon, or by clicking on the 'Marked for Me' button at the top of the Monitoring pane for their current Desk. The info bubble on the 'Marked for Me' button lets you know how many items have been assigned to you in general, or within your current Desk on the Monitoring pane.



Clicking on an item in the 'Marked for Me' list will open it in the Editor, unless the item is locked by another user.

Spiked items and locked items cannot be marked, and only users with the mark for user privileges will be able to use this action.

When marking content for a user, the online status indicator is shown on the user avatars in the list of users, so that the user can easily see whether the target user is currently online or not. The marked user will receive a notification in the Superdesk interface, as well as an email notification. When an item is marked for a user, a new version of the content item is automatically created. By doing so, Superdesk makes sure that the user receives the latest copy of the item and that "dirty changes" are not lost on the way.

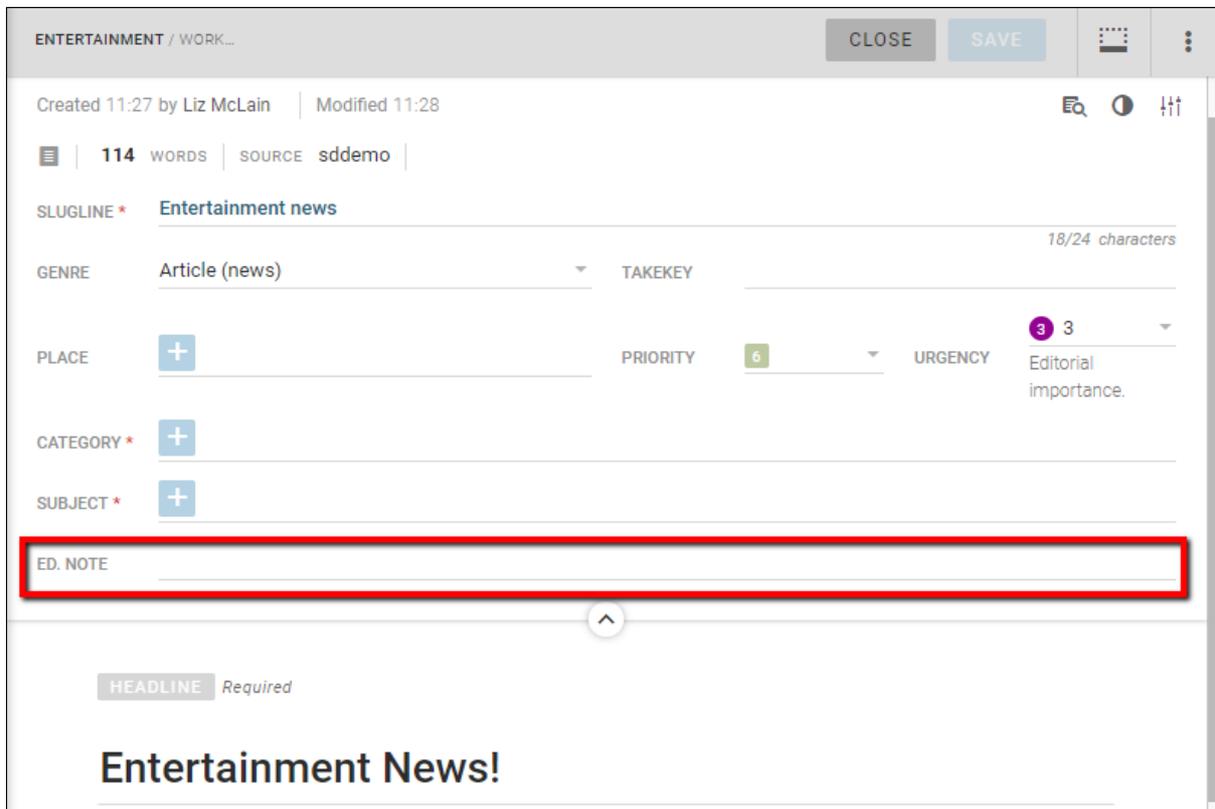
Editor Workflow Tools

As an editor for a particular news beat or Desk, you will likely spend most of your time monitoring issues, editing content submitted by reporters, and publishing content. This section of the Superdesk manual 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 desk(s) and set your permissions and privileges within Superdesk.

Editorial Notes

A section for Editorial Notes in a news item's metadata provides Editors with a means for adding notices to content that will be sent to subscribers. The Editorial Notes is a metadata text box in the article editing window, just above the Headline. In order to use the Editorial Notes, please ensure that the field is enabled in the [Content Profile](#) that you are using.



ENTERTAINMENT / WORK...

Created 11:27 by Liz McLain | Modified 11:28

114 WORDS | SOURCE sddemo

SLUGLINE * Entertainment news 18/24 characters

GENRE Article (news) TAKEKEY

PLACE + PRIORITY 6 URGENCY 3 3 Editorial importance.

CATEGORY * +

SUBJECT * +

ED. NOTE

HEADLINE Required

Entertainment News!

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

Moving Through Workflow & Publishing Content



To publish content or send it to a particular Stage in the content workflow, click the purple [Send To/Publish](#) button on the right-hand corner of the article editing window.

The screenshot shows a 'Send to' dialog box with the following elements:

- DESTINATION:** A dropdown menu currently showing 'Finance'. Below it are three buttons: 'Producer' (with a checkmark icon), 'Revise', and 'Sub-editors'.
- EMBARGO:** A section with the label 'EMBARGO' and two input fields. The first field has a calendar icon, and the second has a clock icon.
- PUBLISHING SCHEDULE:** A section with the label 'PUBLISH SCHEDULE' and two input fields. The first field has a calendar icon, and the second has a clock icon.
- SEND:** A large blue button at the bottom of the dialog.

A pop-up menu will appear with options to select the destination Desk and Stage (i.e. Bureau chief in, Bureau out, Revise 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 Desk are set up by users with the appropriate permissions in the Hamburger menu.

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

Customised Workflow

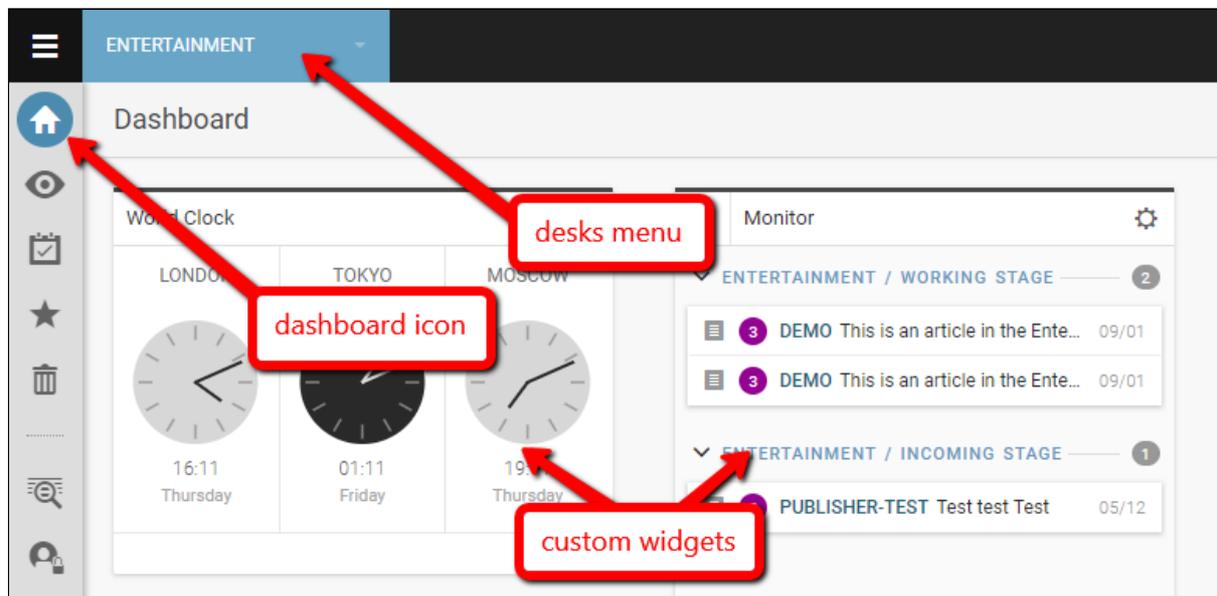
Based on workflow configuration (Desks, Stages, etc...) the content can go through various steps of editing and approvals, or it can be published directly if the authors have the appropriate rights/privileges.

Workflow 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 on the Dashboard



Monitoring enables you to easily observe desk 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 desk Dashboard.



To set up a widget, click the house-shaped Dashboard icon on the Workspace Panel. If you are assigned to multiple desks, make sure you select the correct desk from the Desks menu, and then click the Create 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 desks. You can switch the toggles on for the desks you wish to monitor (blue means on, grey means off) and select the Stages within each desk that you want to include in the display. You can arrange the order of the Saved Searches and 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. Read more about [Dashboard Widgets](#) in other parts of this manual.

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, click the blue SAVE SEARCH button that appears at the bottom of the Advanced Search parameters pane after the search has been completed. Remember to toggle Global Read to the on position in the Saved Search window to make it available for your Monitoring widgets, described above.

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.

Spiking Items

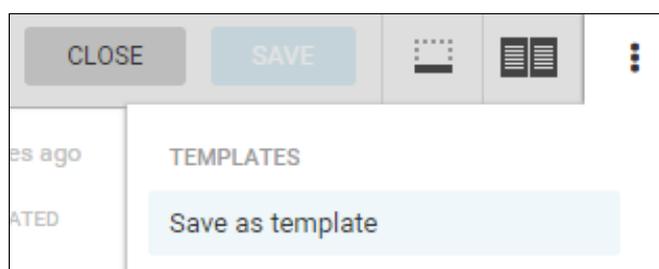


Spiking an item removes it from the desk workflow. It is not a hard deletion, but a reversible removal. To view spiked items for your current desk, navigate to the Spiked Items icon via the Workspace Panel. To Spike an item, click on the article Action menu and select '*Spike Item*'. Spiked items can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

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 at the top of the article editing window and selecting '*Save as template*'.

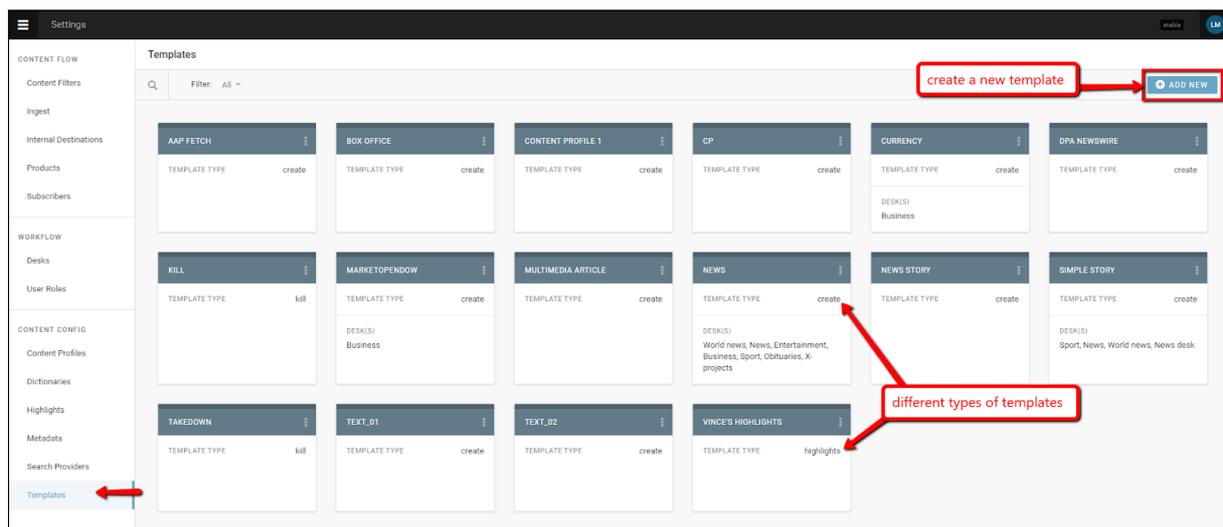


There are a few different types of Templates. 'Creation templates' create content with a specific profile. 'Highlights templates' configure certain elements from multiple articles to be

displayed as flat/digest files. These Templates can include the essentials, like Headline, Abstract and Byline of a group of highlighted stories.

New Templates can be created in the *Settings > Templates* section of the Hamburger menu. 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. Additionally, you can schedule Templates to automatically generate articles.

Administrators can set up Templates so that they can be used by all members of a Desk. To do this, admin users select the 'Add New' button in the top right corner from the Templates tab in the Settings section of the Hamburger menu. This is where admin users can also edit existing templates.



Another useful Templates feature is that Templates can be assigned to a Stage, and can be generated at predefined dates and times. When this scheduling option is turned on, a new item is automatically created and sent to the specified 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. You can enable the Multiedit mode for an article in the action menu at the top of the article editing window. You will find the Multiedit button at the top of the article list. You can select up to 12 articles to open in Multiedit mode at the same time.

Highlights



Highlight lists are desk-specific curated lists of important news items. As an editor, Highlights can be used to keep the Desk members up-to-date on the day's top stories. The Highlights icon located on the Workspace Panel allows you to view all the items you have highlighted and Highlights for the desk you're currently on. They are commonly used for making top 10 lists, section features and other types of user-curated lists. Highlights can be automatically generated against user-specified metadata, or manually curated. Highlight lists can be easily published, or simply used for Superdesk internal communication of important news items.

 CREATE CONFIGURATION

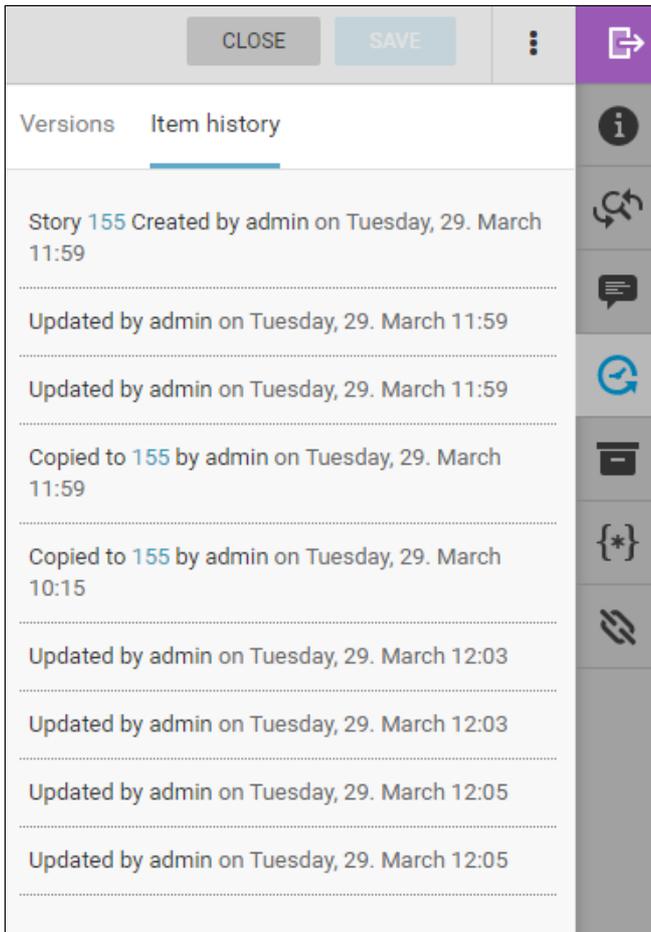
To create a new Highlight, go to the settings section from the Settings menu in the top-left corner of the Superdesk interface. There you can select the Highlights tab and hit *CREATE CONFIGURATION* to make a new Highlight. Highlight lists are desk-specific.

To add a news item to a Highlight list, click on the Action menu for a particular item and select '*Mark item for*' option and then select the Highlight to which you would like to add the item.

Versioning



While an item is open for editing, you can click the *Versioning* icon located on the Editor Sidebar on the right-hand side of the article editing window 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 from which you just reverted.



The Versioning tab also contains information about the history of the article. By clicking on the *Item history* tab in the Versioning window, users can see who created and updated the article, as well as to which desks and publish queue it was sent.

Custom Workspaces and Personal Space

Custom Workspaces are private view configurations accessible from the Desks menu. In Custom Workspaces, you can set up widgets and monitoring for your own customized workflow. Unlike Desks, which have a single Dashboard that is uniform for all users of that desk, your Custom Workspace has its own Dashboard with widgets that only you can see.

In your Custom Workspace Monitoring view, you can select the Desks, Stages and Saved Searches that you want to place in your custom monitoring view by selecting the gear icon located in the top-right corner. This is especially useful for monitoring several Desks in a single place.



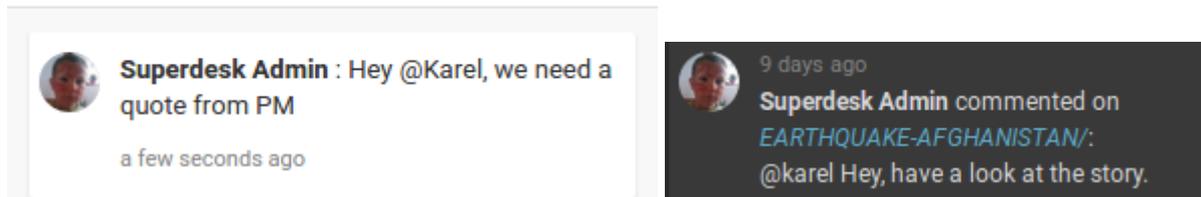
Personal Space is an icon located on the Workspace Panel. Your Personal Space can also be accessed from the Hamburger menu.

Only you can view or edit items created in your Personal Space. To create a new Personal Item, click the Create icon in the top-right corner of the Personal Space pane.

Comments

When an article is open for editing, users can add Comments to each news item with Twitter-like @mentions.

Comments



This feature is useful for alerting other Desks or users to the content in a hurry.



This is the Comments button in the Editor Sidebar.

Comments can be viewed in the Editor Sidebar, when an article is open for editing, using the Comments button displayed above.

Comments can be added to the Body of a news item using the [Inline Comments feature](#).

User Profile Settings

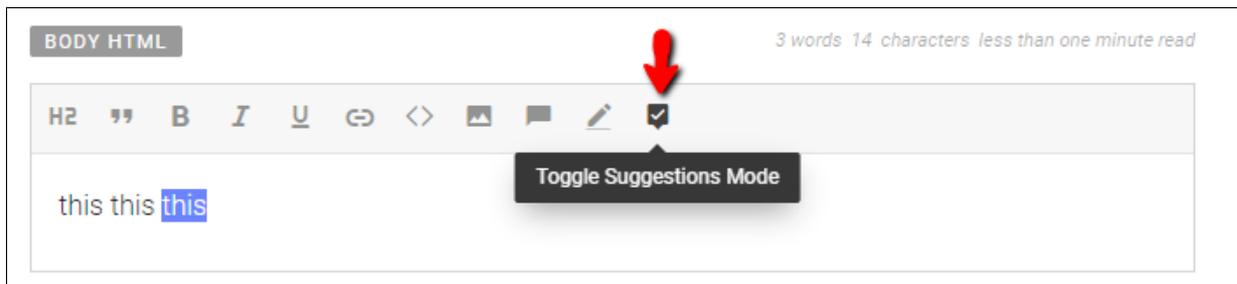
To view and adjust any of your profile settings, click on the User icon located in the upper-right corner of the Superdesk interface. When you select the *profile* link under your user name, an overview of your profile information is displayed. You can also set your preferences and contact information,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

User privileges are set by administrators by selecting *Hamburger menu > User Management*.

Suggesting Mode

When a news item is open for editing, you can use the Suggesting feature to collaborate with the article's author to make changes to the text while preserving the content in its original form. (Suggesting mode is available in the full version of editor 3. Older versions of the editor may not have access to Suggesting mode.)

To make use of the Suggesting feature, use the Suggesting mode button in the toolbar above the Body HTML textbox.

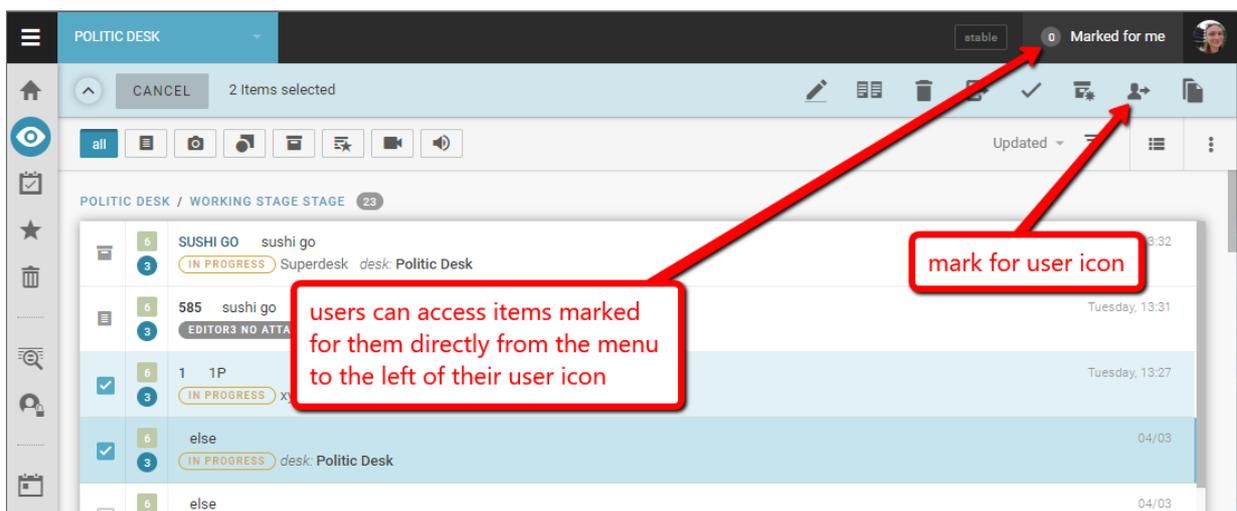


When Suggesting mode is turned on, additions to the text will be shown in green and deletions will be shown in red. [Read more about using Suggesting mode.](#)

Mark for User

As of Superdesk version 1.33, Superdesk now includes a 'Mark for User' feature. This allows users to keep track of news items that require their attention. News items can be marked for users in several ways:

- From the action menu of an item in any list view (such as Monitoring or Highlights).
- From the action menu of an item in the Editor or Preview pane.
- Using the icons at the top of the Monitoring pane if multiple items are selected.



Users can access items that are marked for them directly from the menu to the left of their user icon, or by clicking on the 'Marked for Me' button at the top of the Monitoring pane for their current Desk. The info bubble on the 'Marked for Me' button lets you know how many items have been assigned to you in general, or within your current Desk on the Monitoring pane.



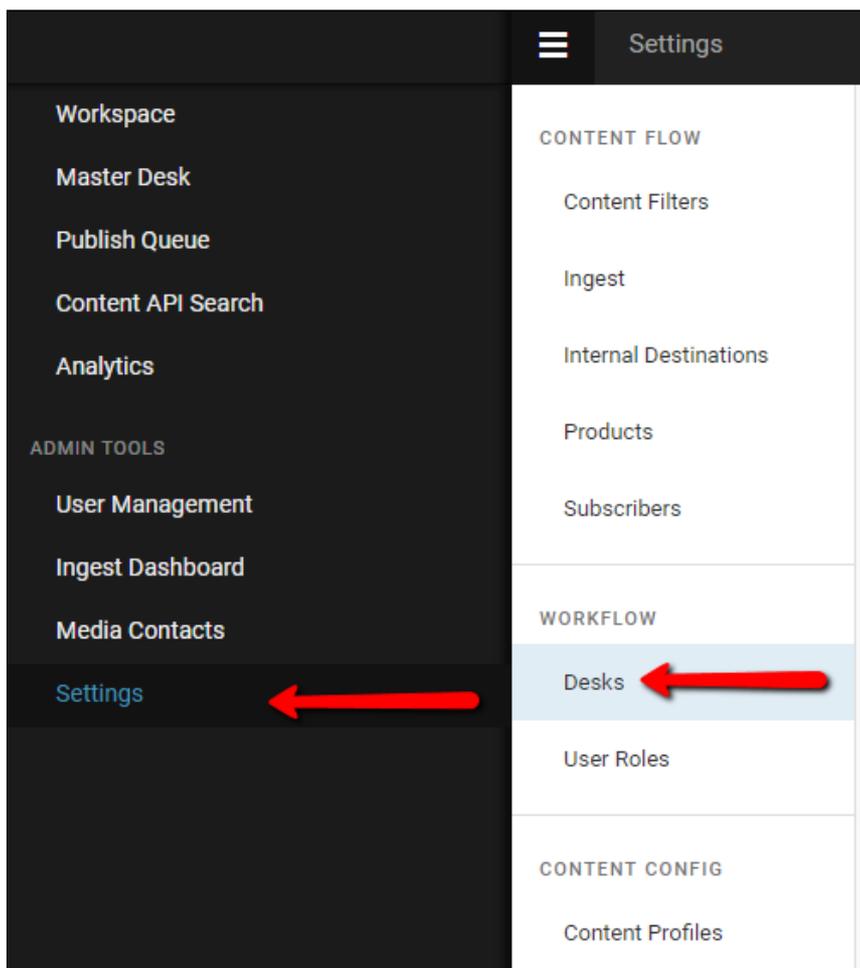
Clicking on an item in the 'Marked for Me' list will open it in the Editor, unless the item is locked by another user.

Spiked items and locked items cannot be marked, and only users with the mark for user privileges will be able to use this action.

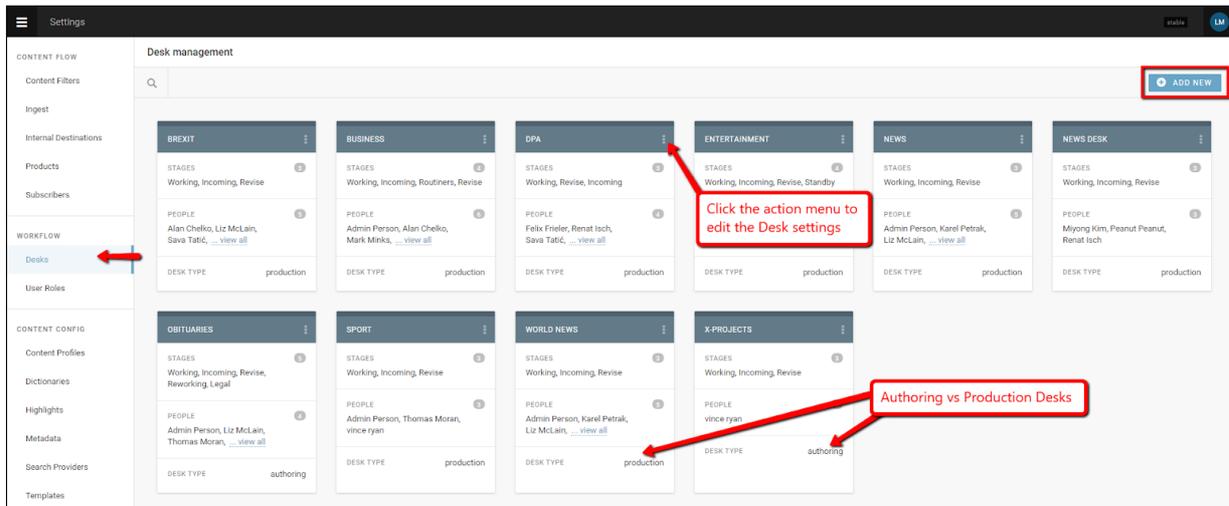
When marking content for a user, the online status indicator is shown on the user avatars in the list of users, so that the user can easily see whether the target user is currently online or not. The marked user will receive a notification in the Superdesk interface, as well as an email notification. When an item is marked for a user, a new version of the content item is automatically created. By doing so, Superdesk makes sure that the user receives the latest copy of the item and that "dirty changes" are not lost on the way.

Desk Creation and Desk Management

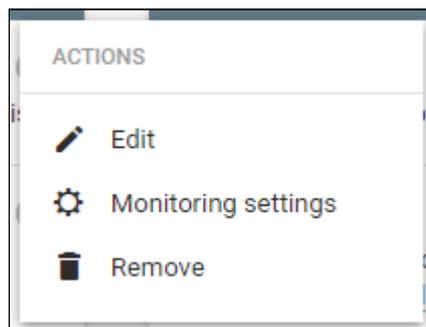
New Desks can be created, and existing Desks can be edited in the Hamburger Menu by Superdesk admins, or users with the appropriate permissions. To get started with Desk configuration, select *Hamburger Menu > Settings > Desks*.



In the Desk Management pane, you can create a new Desk by clicking on the '+ ADD NEW' button in the top right corner of the pane.



This panel is also where you can edit existing Desks. Click the Action menu icon in the top right corner of the desk name to edit an existing Desk.



In the Action menu, select the *Edit* option and a new window will open.

Whether creating a new Desk, or editing an existing desk, you will see the same window:

Add New Desk
✕

General
Stages
People
Macros

DESK NAME *
News Desk

characters 9/40

DESK DESCRIPTION

SOURCE FOR USER CREATED ARTICLES *
aa

Content Expiry OFF

0 days 0 hr 0 min

DESK TYPE *
authoring

DESK LANGUAGE

DEFAULT MONITORING VIEW

i You can choose the default content view of your desk. Use only if you want to override individual users' monitoring view preferences. Select "none" if you want to let users decide.

None
 List View
 Swimlane View
 Photo Grid View

SERVICE

+

SAVE & CONTINUE
DONE

General Desk Settings Tab

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

DESK DESCRIPTION provides information to other users about the desk.

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

CONTENT EXPIRY sets the amount of time before any item in the desk is deleted. Deleted items can no longer be seen in a desk and cannot be searched in the archive.

DESK TYPE can be set to either **authoring** or **production**. An authoring desk generally only produces content but does not publish it directly.

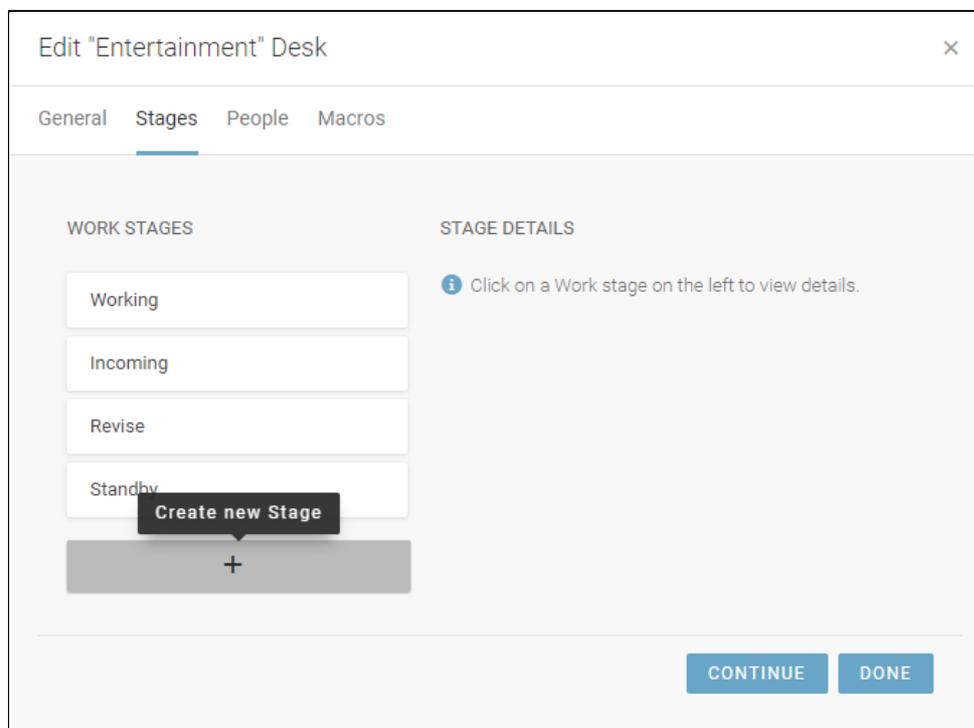
DEFAULT MONITORING VIEW You can choose the default content view of your desk. Use only if you want to override individual users' monitoring view preferences. Select "None" if you want to let users decide.

DEFAULT CONTENT TEMPLATE Selecting a Template from this drop-down menu will make that Content Profile available by clicking the Create icon in the Desk's Monitoring pane.

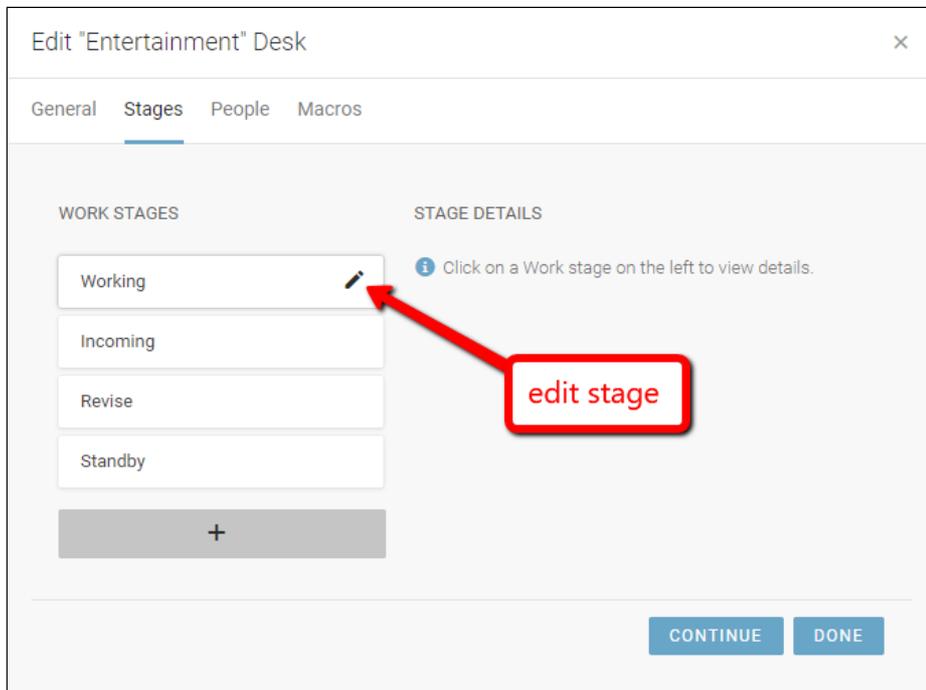
DEFAULT CONTENT PROFILE Selecting a Content Profile from this drop-down menu will apply this Content Profile to all new items created on this Desk that aren't created from a Template.

Stages Tab

In the Edit Desk / Add New Desk window, you will also find a Stages tab. Stages reflect the workflow of each Desk. Sometimes Stages are steps an article must go through in order to be published. For example, an article might go through more than one phase of editing before it is sent off to be published.



From this Stages tab, you can make new Stages to a Desk by clicking the grey '+' button in the Work Stages section.



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 Desk will be able to see content from that stage. If GLOBAL READ is turned on, the Stage will be available for use in any Monitoring view on any Desk. You can also use the LOCAL READ ONLY toggle to ensure that the Stage is not searchable by all Superdesk users, only Desk members.

STAGE DETAILS

Global Read

Local Read Only

Working Stage

Incoming Stage

STAGE DESCRIPTION

Content Expiry **USING DESK DEFAULT**

INCOMING RULE

MOVED ONTO STAGE RULE

OUTGOING RULE

If the **WORKING STAGE** toggle is set to blue, it indicates that any news item or package created in this Desk will be sent to this Stage.

If **INCOMING STAGE** toggle is blue, any item that is fetched to this desk will be put into this Stage.

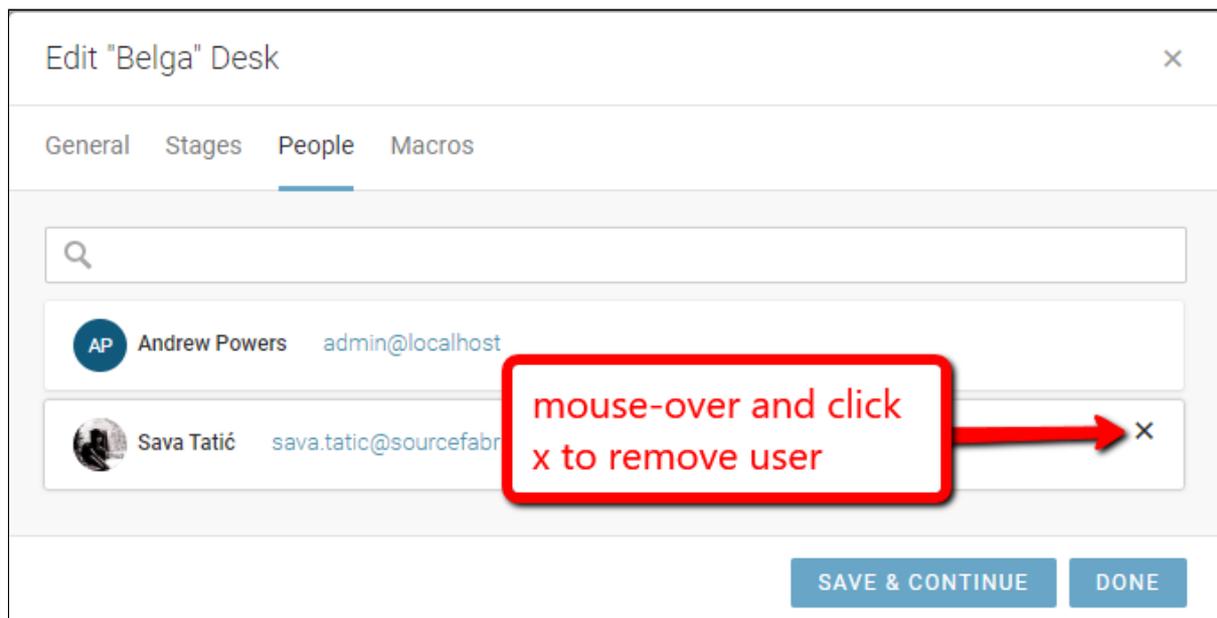
The **CONTENT EXPIRY** can be set to a number of days, hours or minutes to ensure that the most current news is being published. When the content expiry limit is reached, the article is permanently deleted and can no longer be accessed.

The **INCOMING RULE** drop-down menu allows for standardised modifications to be made on articles that are being fetched to this 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. An example of a standard Incoming Rule would be 'validate for publishing' which would check to see if all the required fields are filled out and that it meets other standards for publishing, as mandated by your organization.

The OUTGOING RULE and MOVED ONTO STAGE RULE will also apply a selected macro to any item that leaves the Stage, or is sent to the Stage from another Stage, respectively.

People Tab

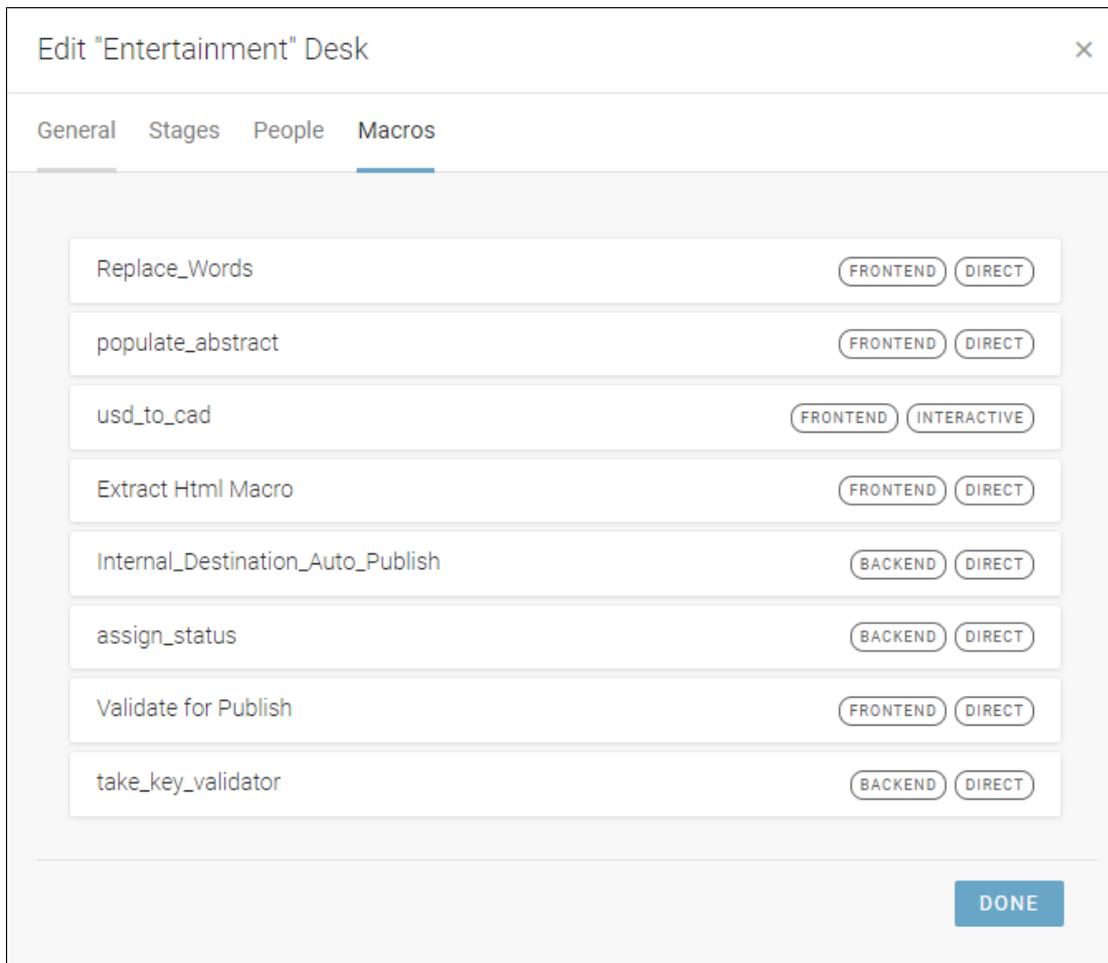
In the People tab of the Edit Desk window, you can add or remove users from the Desk. To add a user, type their name into the search bar. When you select the name of the person, they will be automatically added to the Desk, just click the 'SAVE & CONTINUE' button to confirm the team changes.



To remove a user from a Desk, hover over the user and click the x that appears on the right.

Macros Tab

The final tab in the Edit Desk window is for Macros. All of the available macros are displayed here. You will need the assistance of a programmer to create your Macros.



When you choose a Macro for your incoming rule in the General Tab, it will be one of these Macros.

Desk Routing

The Desk Routing feature allows Desks to be temporarily closed, and the incoming content to be marked for another Desk until the Desk is reopened.

The Desk which is going to be closed is called **Source Desk** and the Desk for which the content is marked for is called **Target Desk** in the following description:

How Desk Routing works:

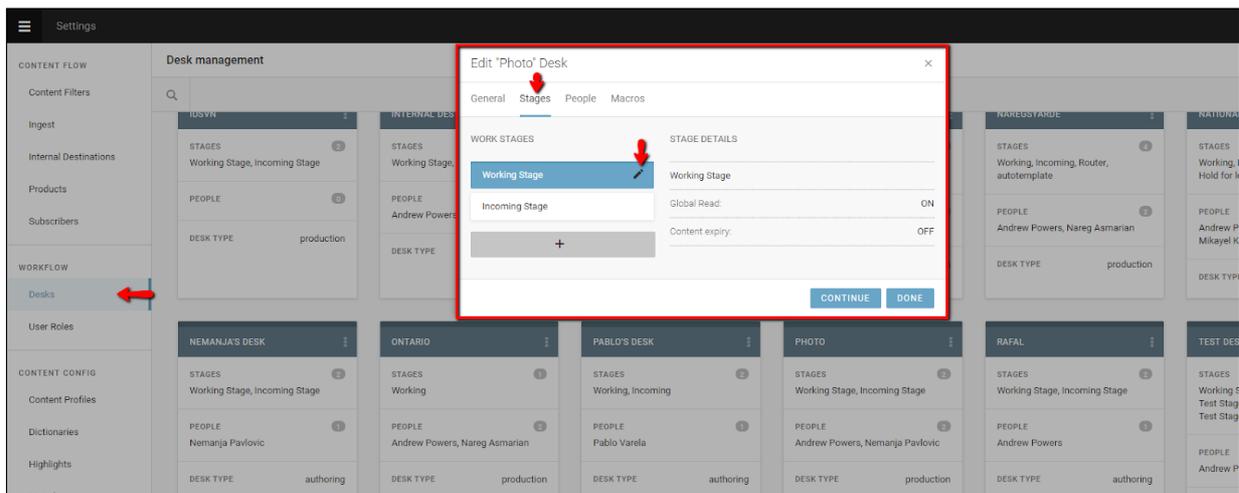
The purpose is to allow journalists to temporarily close their Desk and make sure all incoming content is highlighted (marked) for another Desk until the Desk is reopened. The content stays in the Source Desk all the time, it is only *marked* for another Desk. If the target desk is closed too, the content is marked for its own target desk - i.e. if content is "routed" from desk A to B and B is closed and the content is marked for C, the content from A is marked for C.

Source Desk Configuration

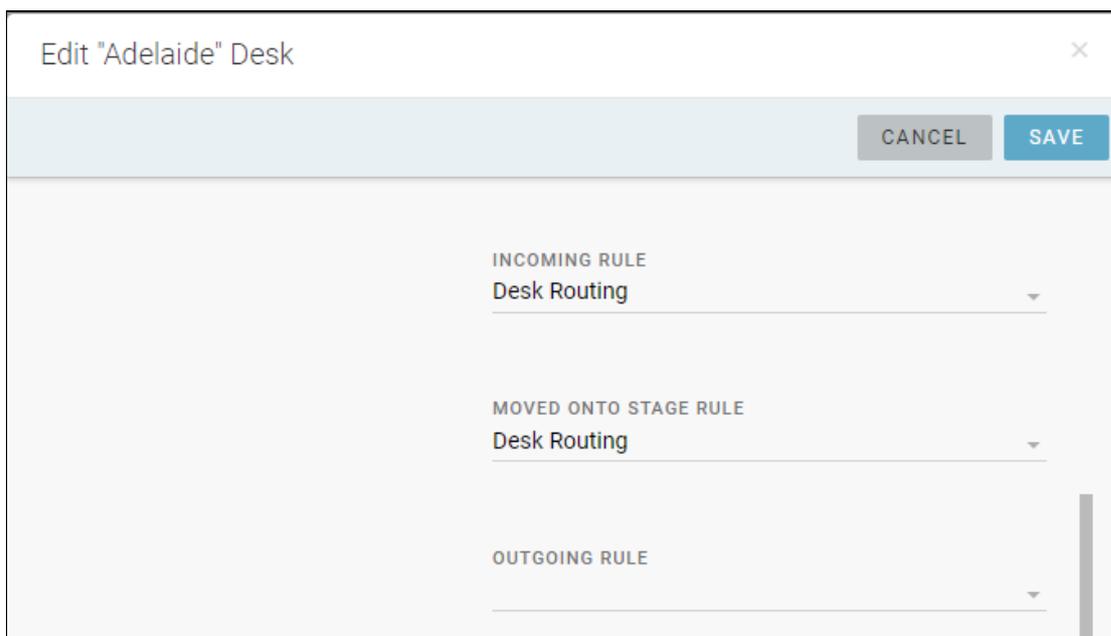
Step 1) Select **routing macro** for the Desk Stage:

You need to activate the *Desk Routing* macro for each stage of the *Source Desk* which is expected to receive new content when the desk is "closed". The macro is run on incoming content and it simply checks the status (open/closed) of the Desk and if the Desk is closed, it marks the content for the *Target Desk*.

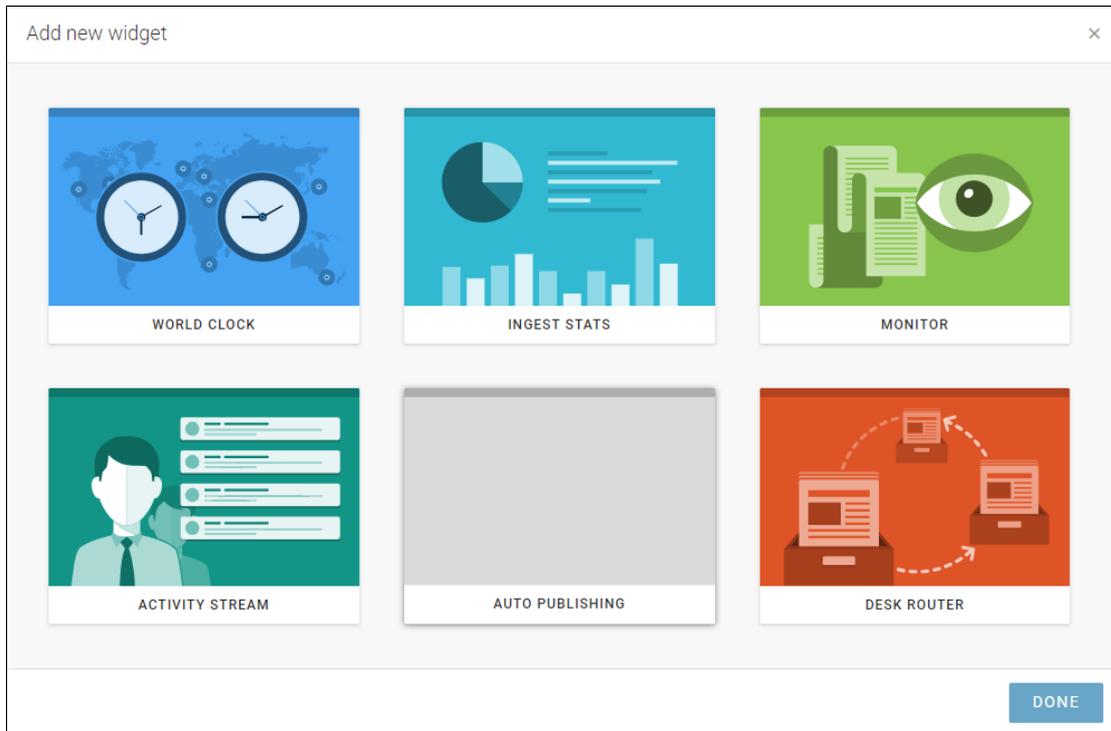
To add a routing macro, select *Hamburger menu > Settings > Desks*. Select your *Source Desk* and then click the Stages tab in the Edit Desk window.



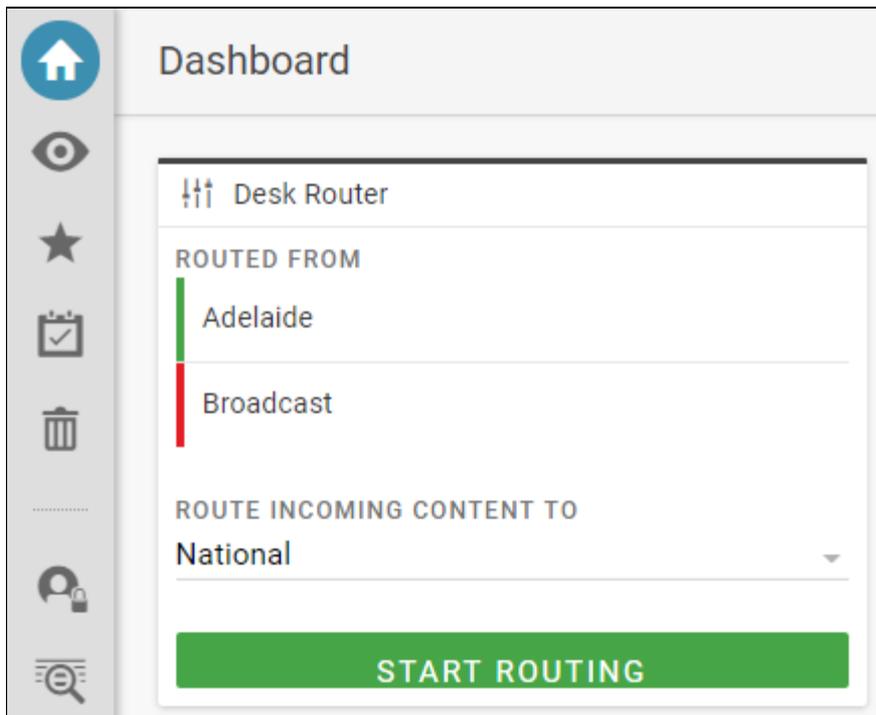
Click the edit icon for each Stage of the Source Desk that will receive content. In the **INCOMING RULE** drop-down menu select the Desk Routing macro, then click the **SAVE** button.



Step 2) Add **Desk Router widget** to the *Source Desk's* Dashboard by clicking the Create icon in the top-right corner of the Dashboard pane. This will open a new window from which you should select the Desk Router widget:



Step 3) In the Desk Router Dashboard widget, select the **Target Desk** from the list under 'route incoming content to'. In the example below, the Target Desk is called "National":

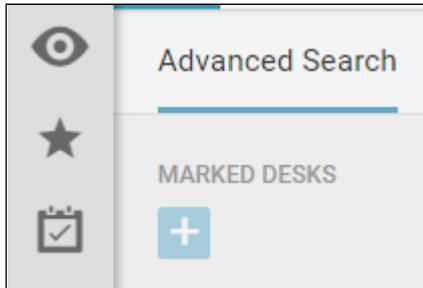


Target Desk Configuration

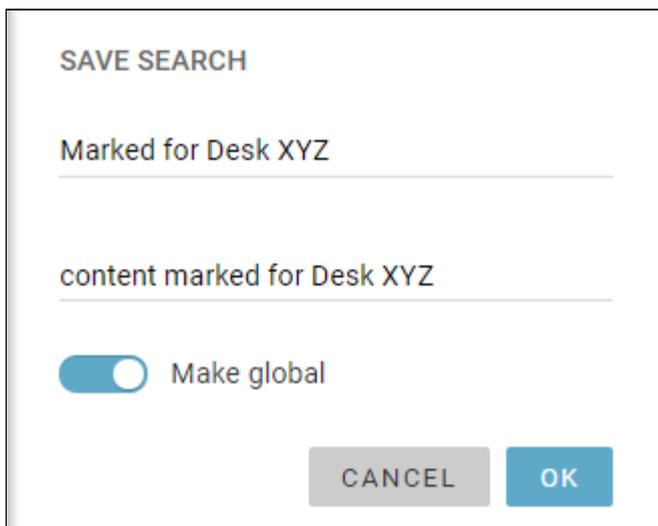
You need to create a Saved Search for content which is marked for the Target Desk and add it to the Monitoring pane or the Dashboard of the Target Desk.

Step 1) Create a **Saved Search**

On the Target Desk, select *Search* → *Advanced Search* and find **Marked Desks** in Parameters tab.

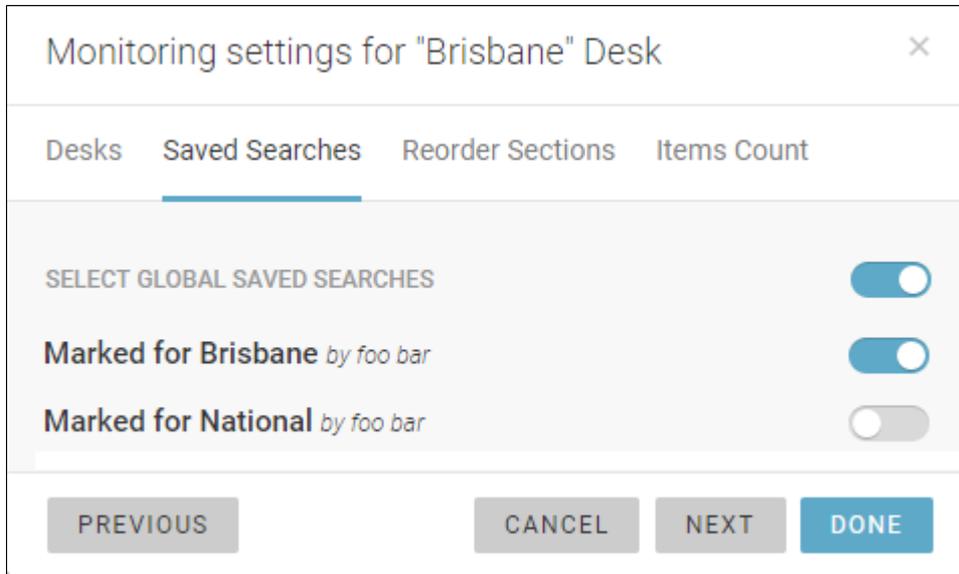


Select the Target Desk from the list of available Desks, click "Search", and then "Save Search". Name the search, and do not forget to make it "global".



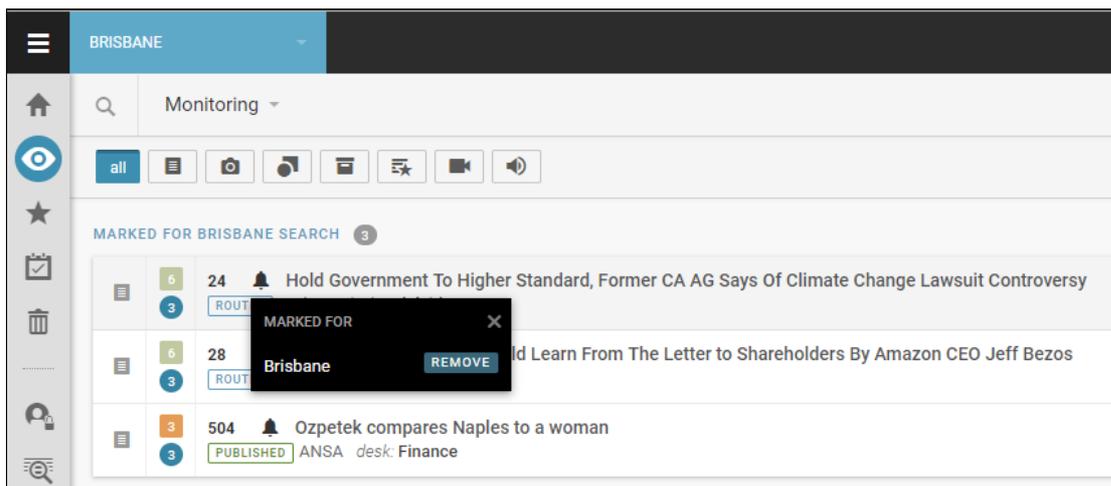
Step 2) Adding the Saved Search to the Target Desk's **Monitoring View**

Go to *Hamburger menu* > *Settings* > *Desks*, and open **Monitoring Settings** of the Target Desk.



Open the *Saved Searches* tab and activate the search that you created in the previous step. You can also select the *Reorder Sections* tab to place the Saved Search at the top of the screen, if needed.

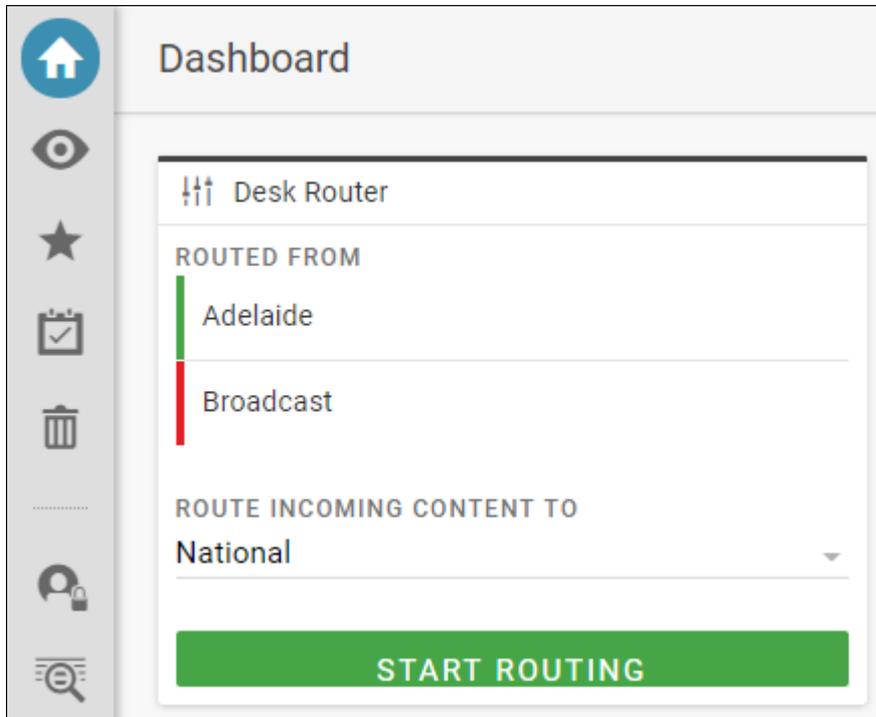
Users will see the following in the monitoring:



The articles from the Source Desk will have the bell icon next to them and clicking it you can see for which Desk(s) the story has been marked.

Closing the Source Desk

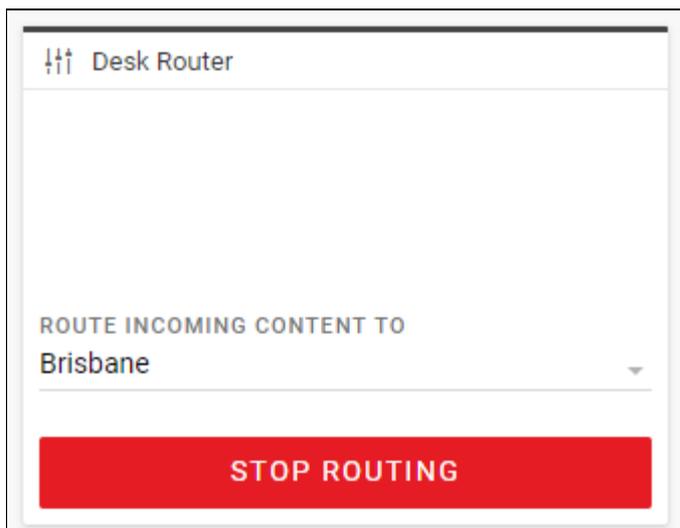
Go to the Source Desk dashboard and click the *'Start Routing'* button in the desk router widget. Make sure the Target Desk is selected. From now on all incoming content will be marked for the Target Desk.



Users of the Target Desk can check the same widget to see from which desk the content is being "routed". In the picture above, there is an active routing from *Adelaide* and an inactive from *Broadcast* desk.

Reopening the Source Desk

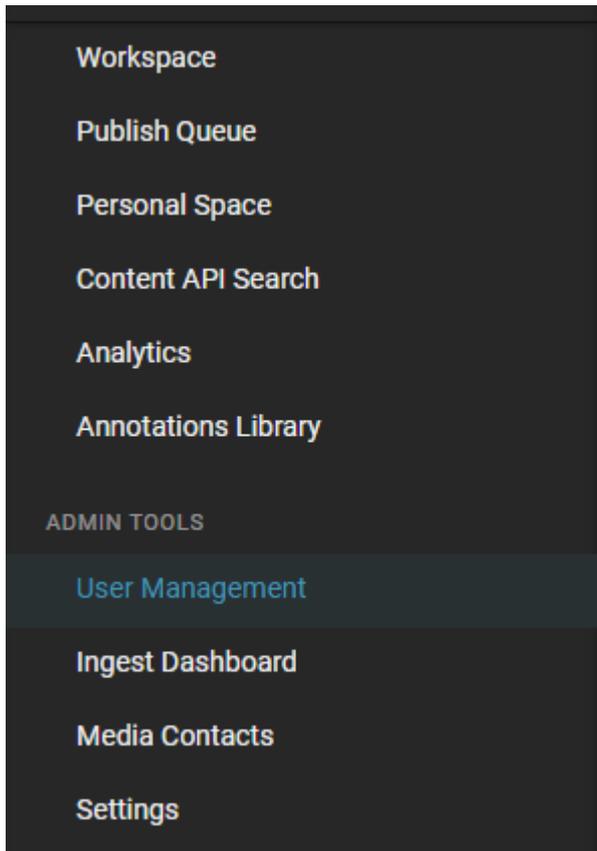
Go to Desk Dashboard and click the 'Stop Routing' button in the desk router widget:



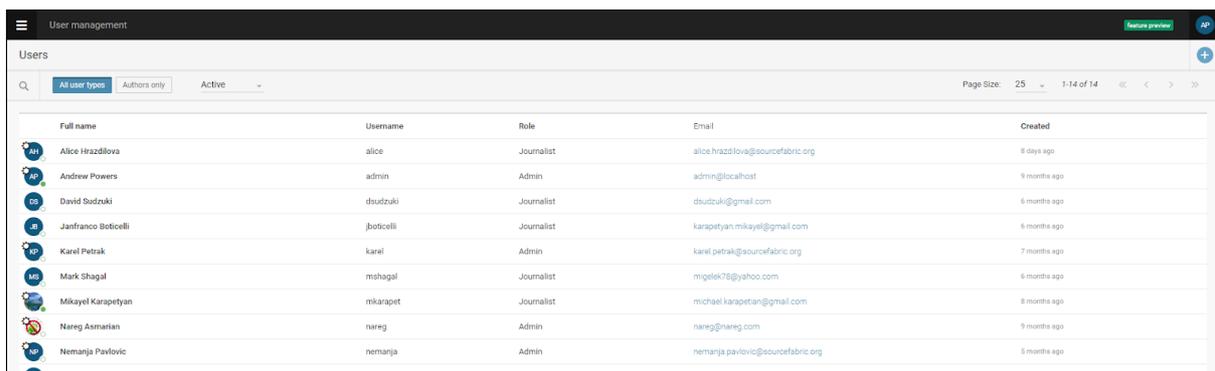
The "marked for" attribute of all stories which were marked by this feature (i.e. not the ones marked manually by users) will be removed by this action.

User Management and User Roles

The User Management section of the Hamburger menu allows administrators to create new users, disable current users, and edit user profiles.

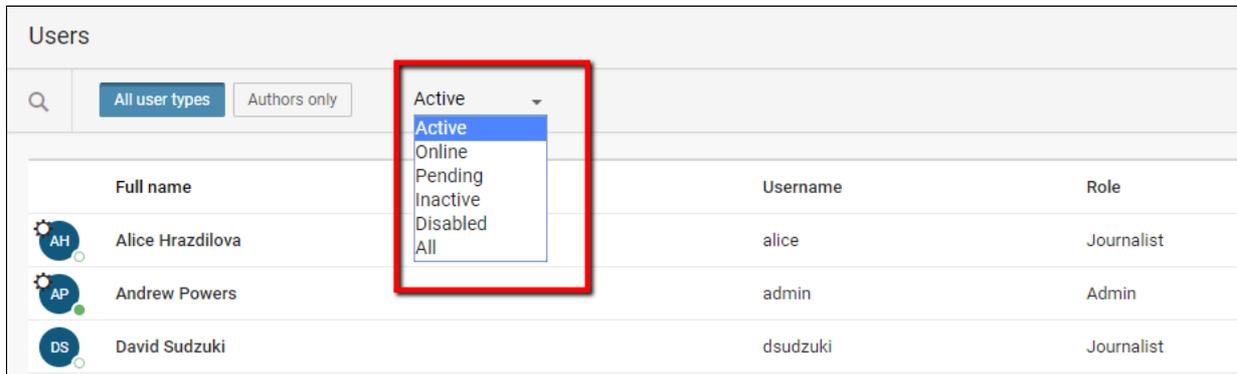


Admins can access the User Management settings from the Hamburger menu in the top-left corner of the Superdesk interface.

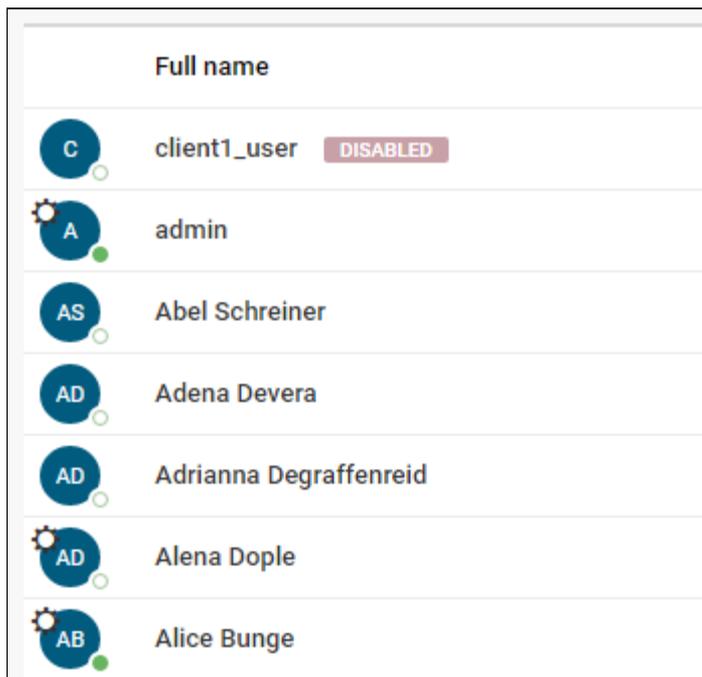
The screenshot shows the 'User management' interface. At the top, there's a search bar and filters for 'All user types', 'Authors only', and 'Active'. Below the filters is a table with columns: Full name, Username, Role, Email, and Created. The table lists several users with their respective roles and creation dates.

Full name	Username	Role	Email	Created
Alice Hrazdlova	alice	Journalist	alice.hrazdlova@sourcefabric.org	5 days ago
Andrew Powers	admin	Admin	admin@localhost	9 months ago
David Sudzuki	dsudzuki	Journalist	dsudzuki@gmail.com	6 months ago
Jaifranco Boticeelli	jboticeelli	Journalist	karapetyan.mikayel@gmail.com	6 months ago
Karel Petrak	karel	Admin	karel.petrak@sourcefabric.org	7 months ago
Mark Shagal	mshagal	Journalist	miguel78@yahoo.com	6 months ago
Mikayel Karapetyan	mikarapet	Journalist	michael.karapetyan@gmail.com	8 months ago
Nareg Asmarlian	nareg	Admin	nareg@nareg.com	9 months ago
Nemanja Pavlovic	nemanja	Admin	nemanja.pavlovic@sourcefabric.org	5 months ago

When you open the User Management menu, you will see a complete alphabetical list of all the active Superdesk users for your news organisation. You can search for a specific user using the search icon at the top of the window.



Beside the search icon, there are filters. Toggle between 'All user types' or 'Authors only' using the blue buttons provided. To the right of those buttons, you will find a drop-down menu that allows you to filter by user status: Choose between Active, Online, Pending, Inactive, Disabled, or All. Pending users are users that have been created within Superdesk, but have not yet confirmed their email to login for the first time.



In the User Management list view, 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 or disabled users will appear in pink text next to the user names.

Adding New Users



This is the Create icon.

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

The screenshot shows a user creation form for 'Liz.McLain'. At the top right are 'CANCEL' and 'SAVE' buttons. Below the user name is a profile picture placeholder with a 'CHANGE PHOTO' button. The form fields are as follows:

- General**
- FIRST NAME**: Liz
- LAST NAME**: McLain
- USERNAME**: Liz.McLain
- SIGN-OFF**: LM
- BYLINE**: @lizmclain
- EMAIL**: liz.mclain@sourcefabric.org
- LANGUAGE**: undefined (dropdown menu) with a [Help us translate Superdesk](#) link.
- ADMINISTRATOR**:
- ROLE**: (dropdown menu)

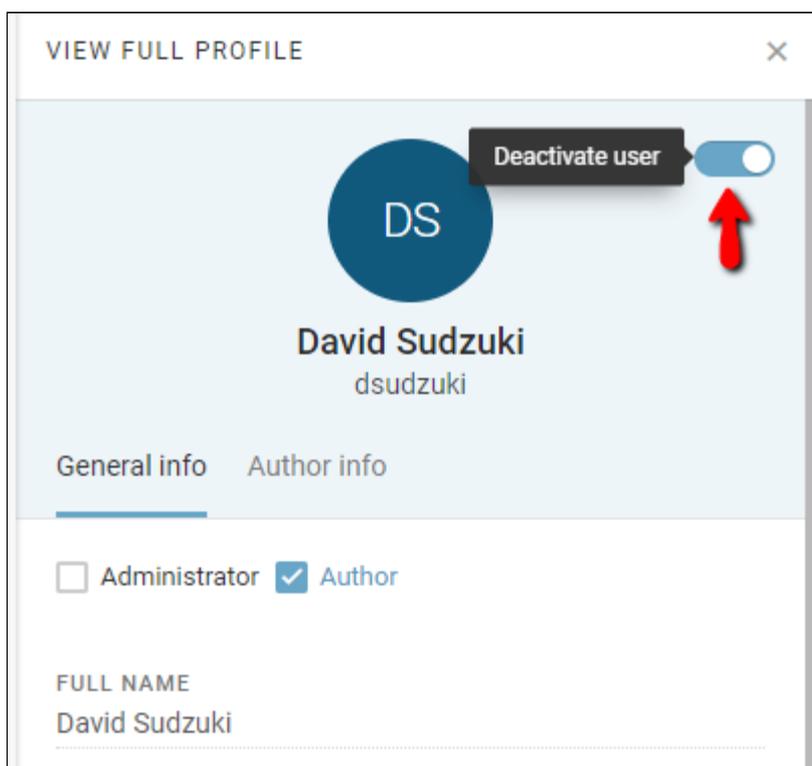
You can change the new user profile picture by clicking on the round grey User icon.

You must input all the mandatory fields before you can save the new user profile. In the blank form, mandatory fields are marked by a red asterisk.

Note that legal usernames can only contain letters and numbers, as well as underscore (_), apostrophe ('), dash (-) and period (.). Once the user profile is created, usernames cannot be changed, so choose carefully.

Once you click the blue *SAVE* button that appears at the top of the pane, an email will be sent to the user with instructions to set up their password and login information.

Disabling Users and User Clearing Sessions



There is a blue toggle at the top of each user profile tab. Switching the toggle to the *off* position will set the user as **inactive**. This prevents them from logging in to Superdesk. Deactivating a user is similar to deleting a user, except that it preserves a minimal amount of information such as their name and username. The username and entity remains in the system such that you can search for articles that they contributed to and edits that they made to news items.



Users can be **disabled** 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. Disabled users will not be able to sign in to Superdesk, but all their profile information is preserved such that they can be reactivated at a later time. The disable function is especially useful for freelance or seasonally contracted users who require intermittent access to Superdesk.

The skull icon that appears in the User Management list view when you hover over a user in the list, allows you to **clear all** the user sessions. Clearing all the sessions kicks the selected user out of their current user session. If they were logged in anywhere, they will no longer be logged in after clicking this *Clear All* skull icon. They will need to re-login to continue any work.

Editing User Profiles

If you have sufficient permissions, clicking on an entry in the User Management list will open a preview tab on the right of the Superdesk interface. You can change the contact 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. **Note that usernames cannot be edited.**

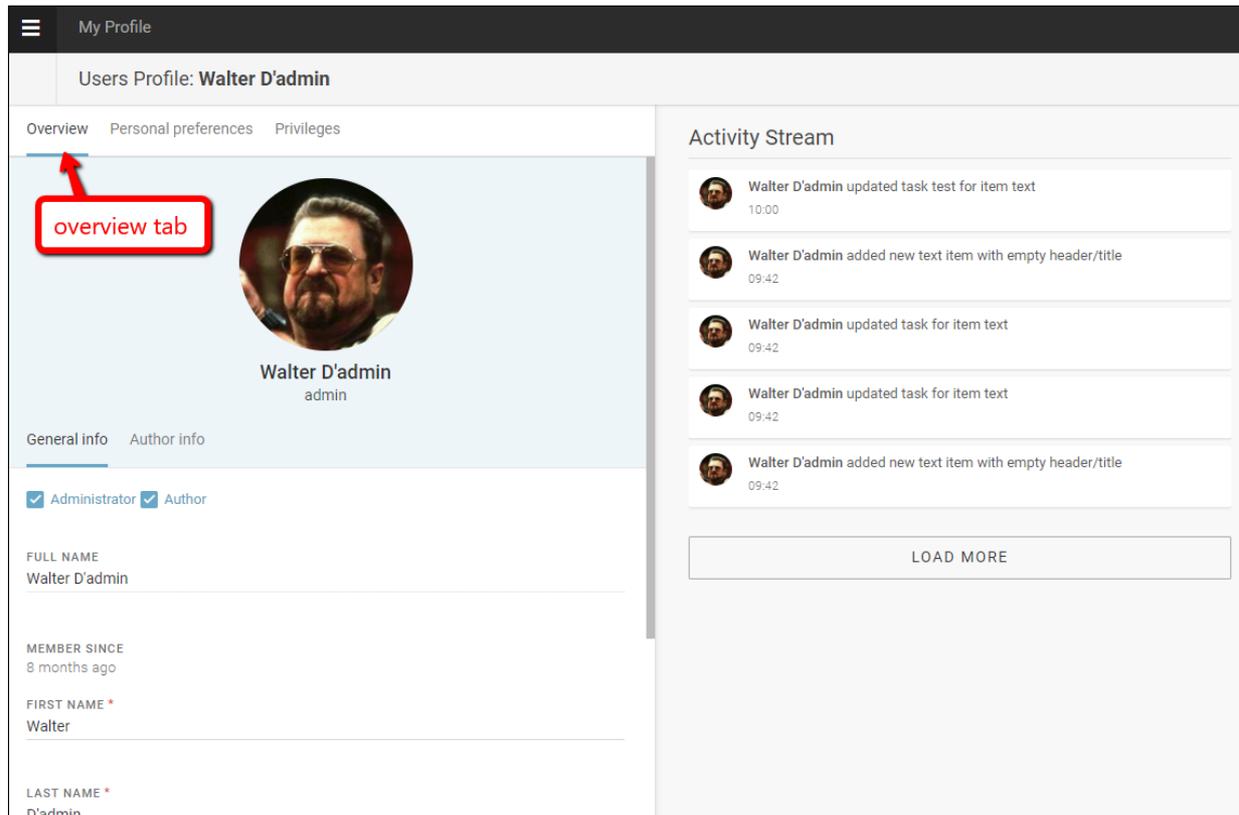
Changing a user's role will affect the permissions and privileges of the user. User roles within Superdesk are configurable. Individual permissions can also be adjusted in the full profile view, which can be accessed by clicking the *VIEW FULL PROFILE* button at the top of the pane, as pictured below:

Full name	Username	Role	Email	Created
Alice Hrazdilova	alice	Journalist	alice.hrazdilova@sourcefabric.org	8 days ago
Andrew Powers	admin	Admin	admin@localhost	
David Sudzuki	dsudzuki	Journalist	dsudzuki@gmail.com	
Janfranco Botiicelli	jbotiicelli	Journalist	karapetyan.mikayel@gmail.com	5 months ago
Karel Petrak	karel	Admin	karel.petrak@sourcefabric.org	7 months ago
Mark Shagal	mshagal	Journalist	migilek78@yahoo.com	6 months ago
Mikayel Karapetyan	mikarapet	Journalist	michael.karapetyan@gmail.com	8 months ago
Nareg Asmarian	nareg	Admin	nareg@nareg.com	9 months ago
Nemanja Pavlovic	nemanja	Admin	nemanja.pavlovic@sourcefabric.org	5 months ago
Nevill Chamberlen	nchamberlen	Journalist	akarapetyan2002@gmail.com	4 months ago
Pablo Varela	pablovarela	Admin	pablovarela182@gmail.com	9 months ago
Sava Tatic	sava	Admin	sava.tatic@sourcefabric.org	9 months ago
Tomas Kikuts	tomaskikuts	Journalist	tomas.kikuts@sourcefabric.org	8 months ago

Clicking on the *VIEW FULL PROFILE* link at the top of the user profile 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. The information displayed in the Overview tab is the same as what was visible in the previous user information tab.

Overview tab

The top half of the Overview tab contains basic contact information such as your display name, sign-off, email address, and your contact phone number. You can edit these fields directly from this Overview tab. Note that you cannot change your username once the account is created, so be sure to choose the username carefully.



In the bottom half of the Overview tab, you can change your Superdesk display language. This will translate the Superdesk user interface to a language of your choosing. You can help us translate Superdesk by visiting this website:

<https://www.transifex.com/sourcefabric/superdesk/>

In the Overview tab you can also change your login password. Click on the *reset password* button. This feature can be used by admins to reset the password of a user.



Remember to click the blue SAVE button to confirm your changes. Click the CANCEL button to discard your changes without saving.

Your **Default Desk** is the desk that you will be taken to when you log in to Superdesk. You will find the default desk setting towards the bottom of the Overview tab. It is a good idea to set your default desk as the desk that you use the most.

Privileges tab

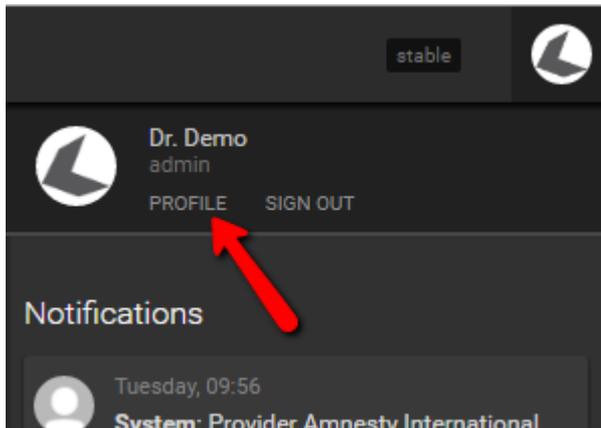
Admins can adjust individual privileges in the full profile view by clicking the Privileges tab.

	User	Role	
ARCHIVE	<input checked="" type="checkbox"/>	JOURNALIST	
ARCHIVE MANAGEMENT	<input checked="" type="checkbox"/>	JOURNALIST	
BROADCAST	<input type="checkbox"/>		
CONCEPT ITEMS MANAGEMENT	<input type="checkbox"/>		
CONTACTS MANAGEMENT	<input checked="" type="checkbox"/>	JOURNALIST	
CONTACTS VIEW RIGHTS	<input type="checkbox"/>		
CONTENT API SEARCH	<input type="checkbox"/>		

These individual permission adjustments can be outside of the large scope of user roles. Admins can use the checkboxes in this pane to add or remove specific permissions.

Viewing your own Profile settings

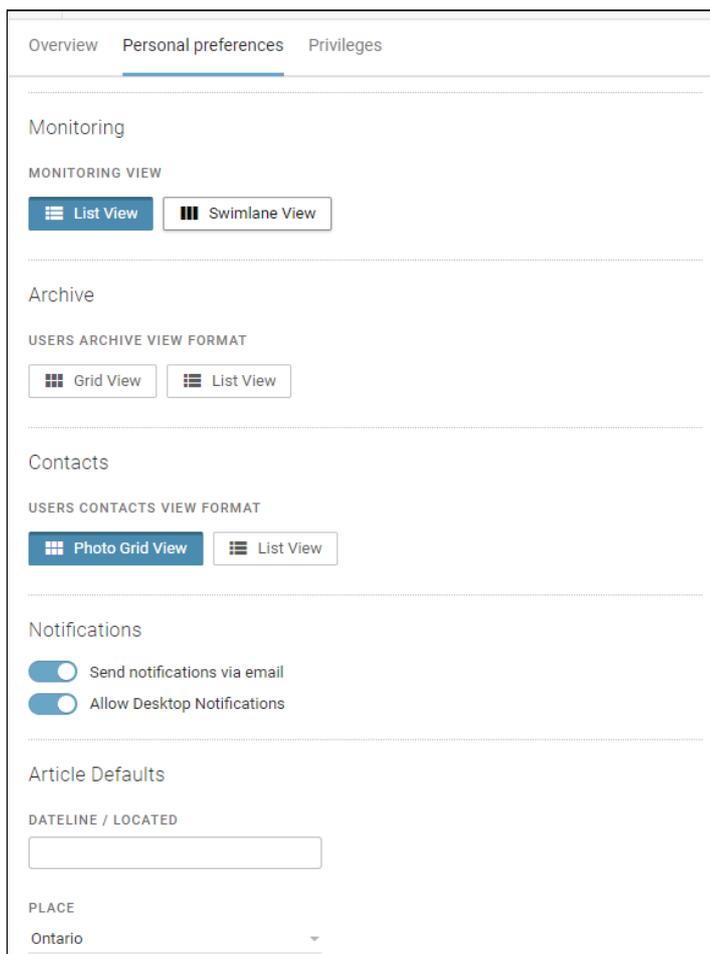
Each user can view and edit their own profile settings by clicking on their user icon in the top-right corner of the Superdesk interface, then clicking on the Profile link.



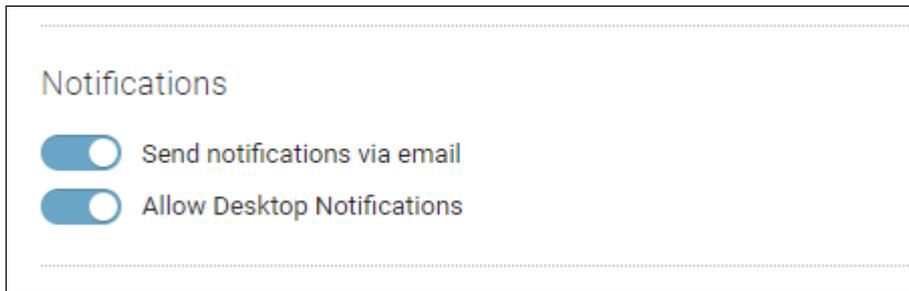
You might see three tabs along the top of your profile: Overview, Preferences and Privileges. The Overview and Privileges tab are described in the previous section. The Personal Preferences tab is accessible only to you.

Personal Preferences tab

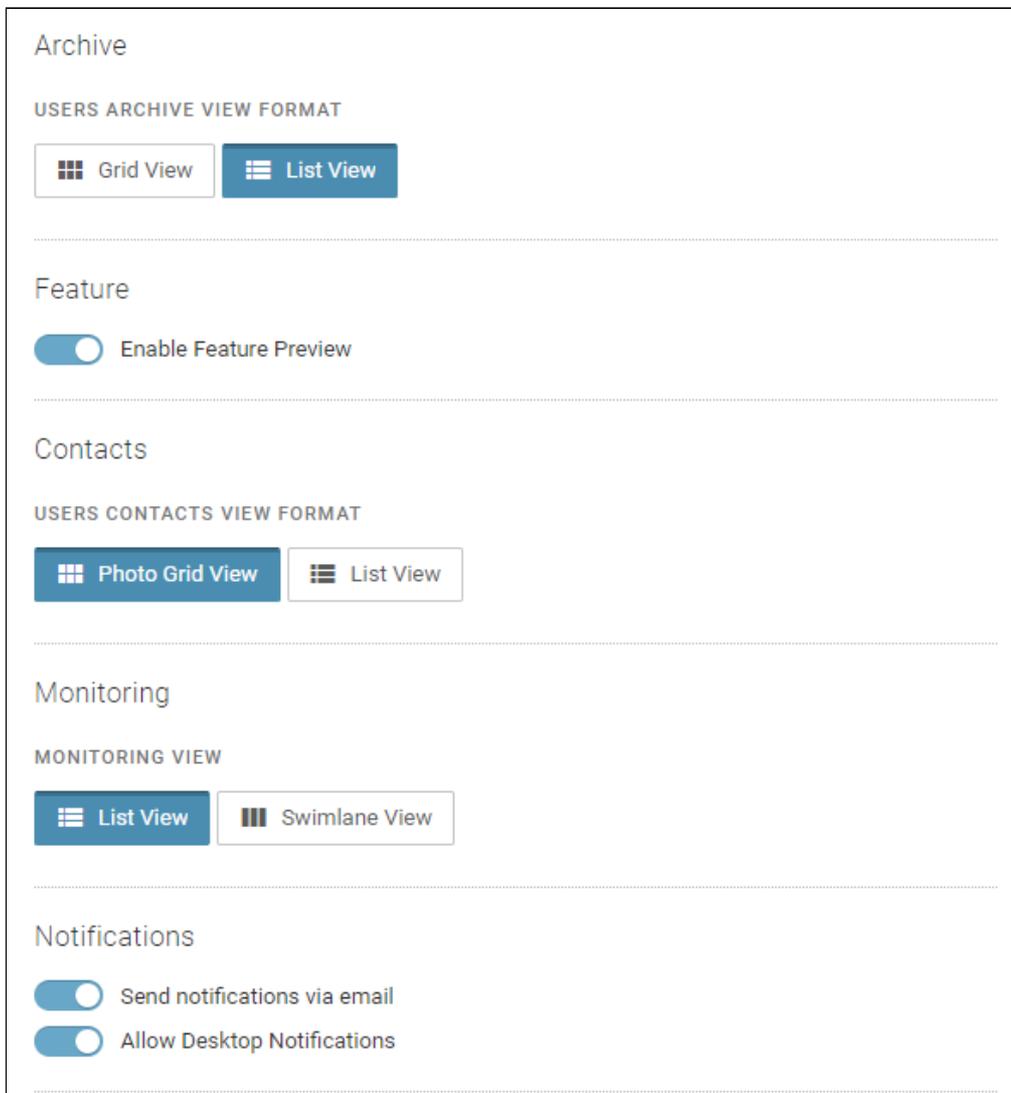
In the Personal Preferences tab, you can adjust your profile defaults and time saving features.



The first three options will let you customize your *default* view of lists in the Monitoring pane, Archive and Contacts. You can still switch between the two views on the actual panes by selecting the grid view or list view icon in the top right corner of each.



You can choose to have email notifications enabled or disabled using this blue toggle. If the toggle is grey (off) you will not receive the system notifications by email. Same for the Desktop Notifications.



As a content producer, you might often find yourself reporting regularly from the same location. The article defaults help you pre-populate the dateline and place fields in news items that you create. This can be a great time-saving feature. It is possible to modify these fields again once the news item is created.

Article Defaults

DATELINE / LOCATED

PLACE

▼

Categories

Preferred Categories

By selecting the categories you are interested in, the system will only display these in a menu for setting the content item's categories (along with any of its existing categories).

ALL | NONE | DEFAULT

Domestic news

Sports

World news

Business

Entertainment

Desks

Preferred Desks

By selecting the desks as your preferred desks, they appear first in the order when sending or publishing items.

AAPs	Alice 2 desk	Alice 3 Desk
Alice's Desk	Karel	Karel Secret
MIKAYEL_DESK	My test desk	Naregs 2nd

You might also find that you are using only a handful of categories in your item creation. There are some categories that you might never use. By selecting categories from the preferred categories list, you can create a shortlist of frequently used categories such that you would not need to scroll through ones that you never use.

Preferred Desks allow you to customise which desks appear first in your workflow for sending drafts and publishing items.

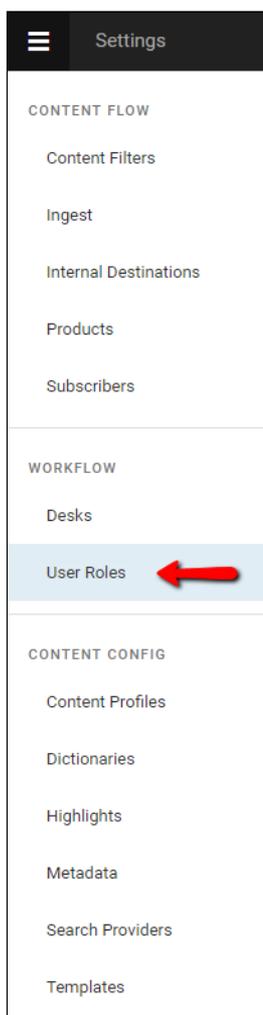
Resetting a User's Password

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

RESET PASSWORD

User Roles

Just as all of the Desks, Stages, and Content Profiles are configurable in the Superdesk interface, so too are the User Roles. The User Roles menu item allows you to define the user types and permissions associated with each of those user types.

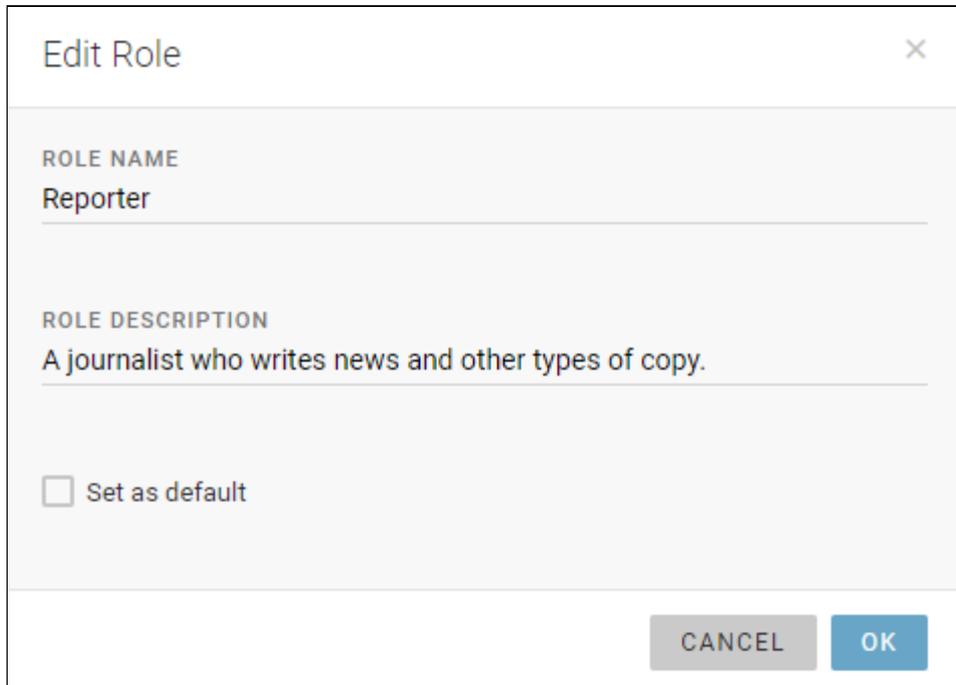


Admins can access the User Roles settings from the Hamburger menu in the top left corner of the Superdesk interface.

The User Roles pane is where you will control users' access to different functions within Superdesk on a large scale. Individual user privileges can also be edited from each individual's [full profile view](#).



From the User Roles panel, you will be able to rename and change the description of each role within Superdesk by clicking the pencil icon that appears when you mouse-over each role.

The 'Edit Role' dialog box is shown. It has a title bar with 'Edit Role' and a close button (X). The dialog contains two text input fields: 'ROLE NAME' with the value 'Reporter' and 'ROLE DESCRIPTION' with the value 'A journalist who writes news and other types of copy.'. Below these fields is a checkbox labeled 'Set as default' which is currently unchecked. At the bottom right, there are two buttons: 'CANCEL' and 'OK'.

Selecting the *Set as default* checkbox in the Edit Role window will set that role as the top pick in new user creation.

The Roles Privileges pane allows you to choose which roles are eligible for which privileges. Note that the Admin role is missing from these pages because by default admins have all permissions and that cannot be changed.

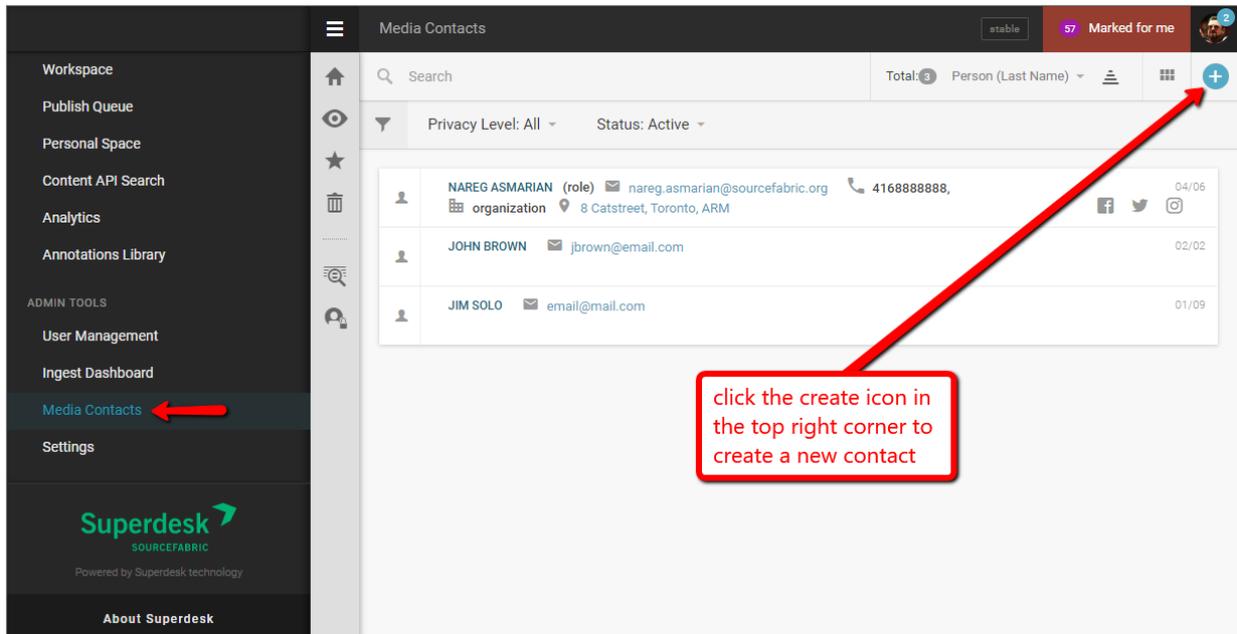
The screenshot shows the 'User Roles' configuration interface. On the left, a sidebar contains a navigation menu with categories: CONTENT FLOW, WORKFLOW, and CONTENT CONFIG. The 'User Roles' item is highlighted with a red box. The main area is titled 'User Roles' and contains a 'Roles' section with a search icon and a 'Roles privileges' link, which is also highlighted with a red box and a red arrow. Below this is a table with columns for 'Reporter' and 'Subeditor' (marked as 'DEFAULT'). The table lists various roles and their associated privileges, with checkboxes indicating whether a privilege is enabled for that role.

	Reporter	Subeditor
ARCHIVE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ARCHIVE MANAGEMENT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BROADCAST	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONTACTS MANAGEMENT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONTACTS VIEW RIGHTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONTENT API SEARCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONTENT FILTERS	<input type="checkbox"/>	<input checked="" type="checkbox"/>

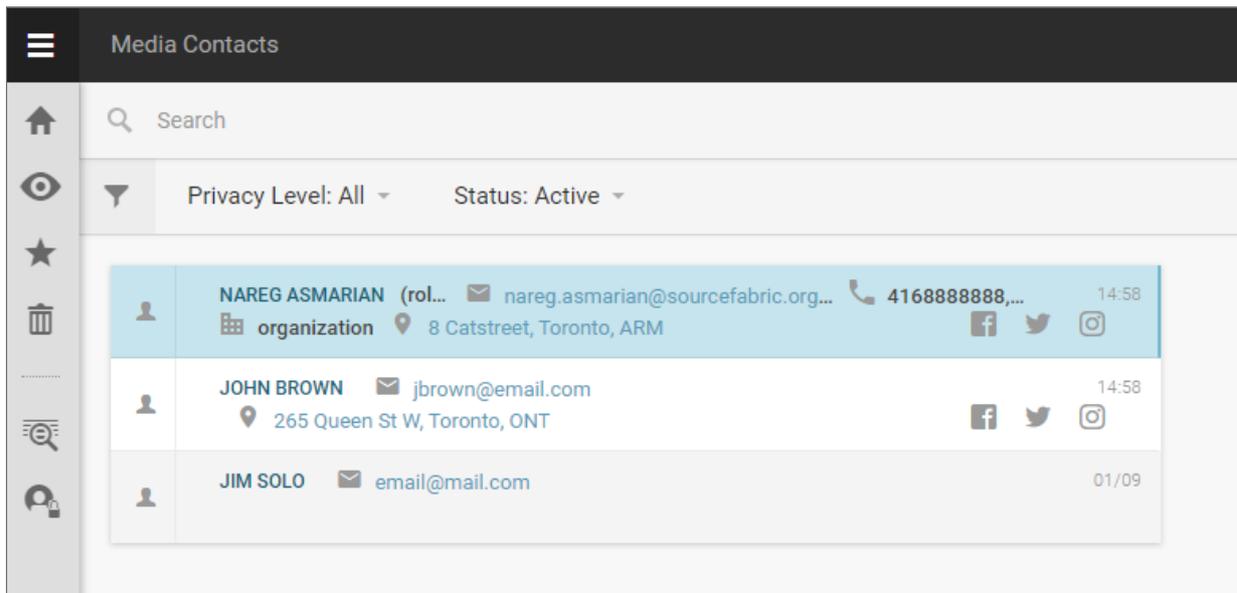
You can use the checkboxes to add or remove privileges from the user roles. Users may need to log out and log back in to update any changes you have made to their user roles.

Media Contacts

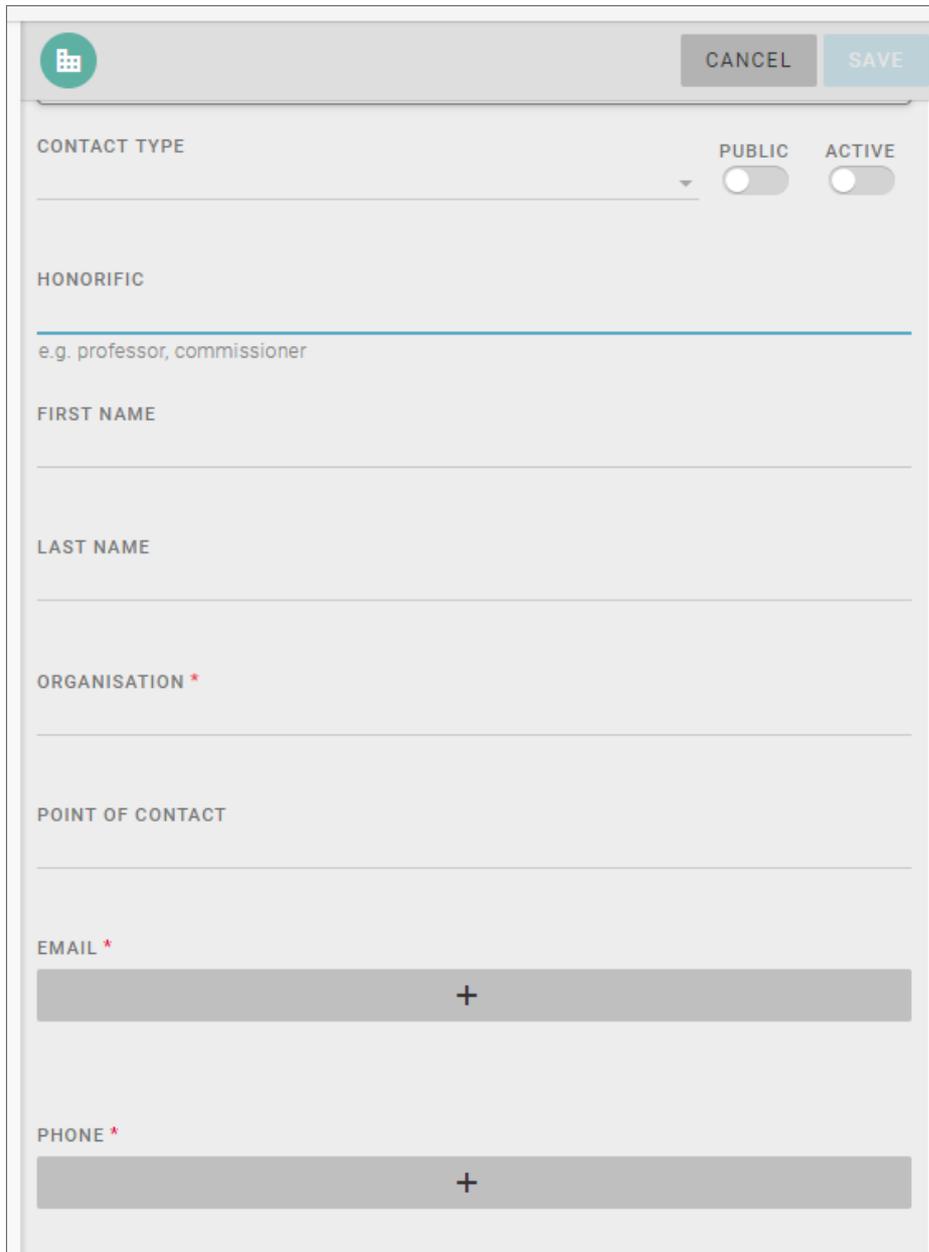
Superdesk has an internal repository for Media Contacts. These contacts can be created and edited by users with the appropriate permissions. Media Contacts can be accessed through the Hamburger Menu, as shown below:



The Superdesk-internal Media Contacts are a great time-saving feature for journalists and editors. Without having to leave the Superdesk interface, users can find important contact information for their media sources, contributors or subscribers.



New Media Contacts can be added using the Create icon in the top right corner of the Media Contacts pane. Clicking on the Create icon will open a new pane on the right of the Superdesk interface:



The screenshot shows a form for adding a new Media Contact. At the top left is a grid icon. At the top right are 'CANCEL' and 'SAVE' buttons. The form fields are as follows:

- CONTACT TYPE**: A dropdown menu.
- PUBLIC**: A toggle switch, currently off.
- ACTIVE**: A toggle switch, currently on.
- HONORIFIC**: A text input field with a blue underline and a placeholder example: "e.g. professor, commissioner".
- FIRST NAME**: A text input field.
- LAST NAME**: A text input field.
- ORGANISATION ***: A text input field, with a red asterisk indicating it is required.
- POINT OF CONTACT**: A text input field.
- EMAIL ***: A text input field with a red asterisk, containing a grey bar with a plus sign.
- PHONE ***: A text input field with a red asterisk, containing a grey bar with a plus sign.

Required fields are marked with a red asterisk. Click the SAVE button in the top right corner of the pane to add your new Media Contact. In addition to phone and email contact information, you can also add fax, twitter, facebook, instagram and street address.

In the Media Contacts pane, clicking on the mail, twitter, facebook or instagram icons will send you directly to those websites, or open your computer's mail program.

Defining Publishing in Superdesk

There are several steps to defining publishing in Superdesk. This chapter provides an overview of all the various modules to consider when publishing from Superdesk. This chapter is presented independently from the Superdesk Publisher component, which is an optional add-on to Superdesk.

The first step to publishing in Superdesk allows users to create automatic rules that are used to group published news items together. This means that you can use one instance of Superdesk to publish specific content to multiple destinations. These rules are called **Content Filters**.

Products are then created based on the application of those Content Filters. The simplest Product would be a Product with no Content Filters applied. In that case, every item that is published will be part of the Product. Products also define the delivery method of the content that is being published.

The next step is to set up **Subscribers**. Setting up Subscribers lets you link Products with **Destinations**. Subscribers might be news agency customers, but in the world of digital publishing you can think of them as of publications. For each Subscriber, you can define the Products. Products are how the news items are sent to your Subscribers, including formats and delivery methods, and the Destination to where they should be published.

Once you've attempted to publish your items, you can check the details or resend the item from the Publish Queue. Once successfully published to your Subscribers, all of your news items will be saved in your Legal Archive.

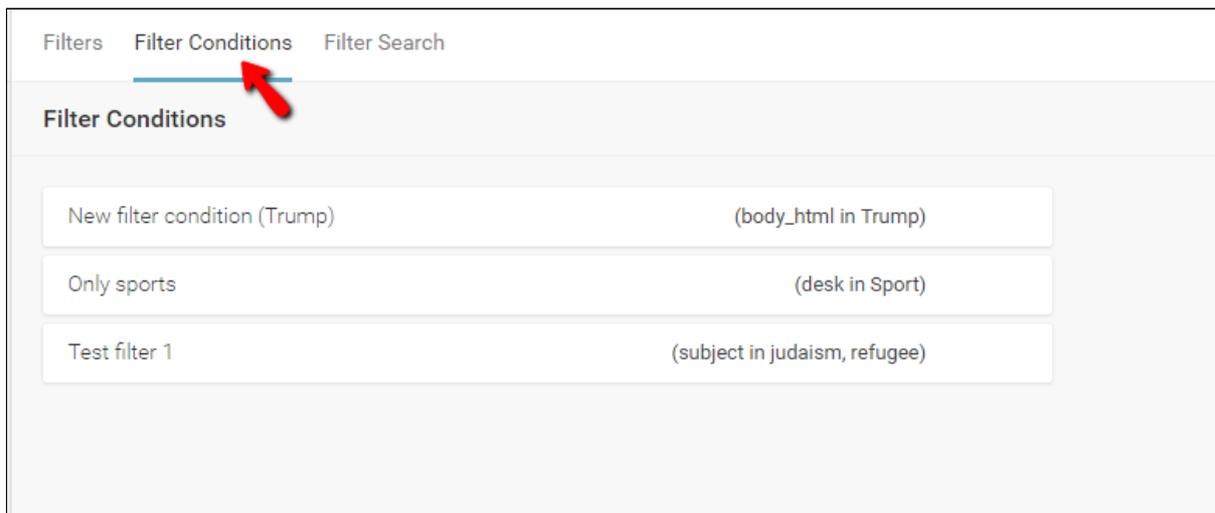
Steps to publishing in Superdesk

1. Make [Content Filters](#)
 - Make Filter Conditions
 - Assemble Filter Statements
 - Test Content Filters
 - Filter Search
2. Create [Internal Destinations](#) (optional)
3. [Create Products](#) (applying Content Filters)
4. [Define Subscribers](#) (associating Products and Destinations)
5. [Publish](#) your news items to your Subscribers
6. Check your [Publish Queue](#) to see if the news item published successfully
7. View your [Legal Archive](#) (optional)

Make Content Filters

Content Filters allow you to create a series of criteria through which Superdesk can narrow down the news items and create news item groupings. These Content Filters allow you to build various Products for distribution. You can use any number of Filter Conditions, or Content Filters to automatically select the content for the Product.

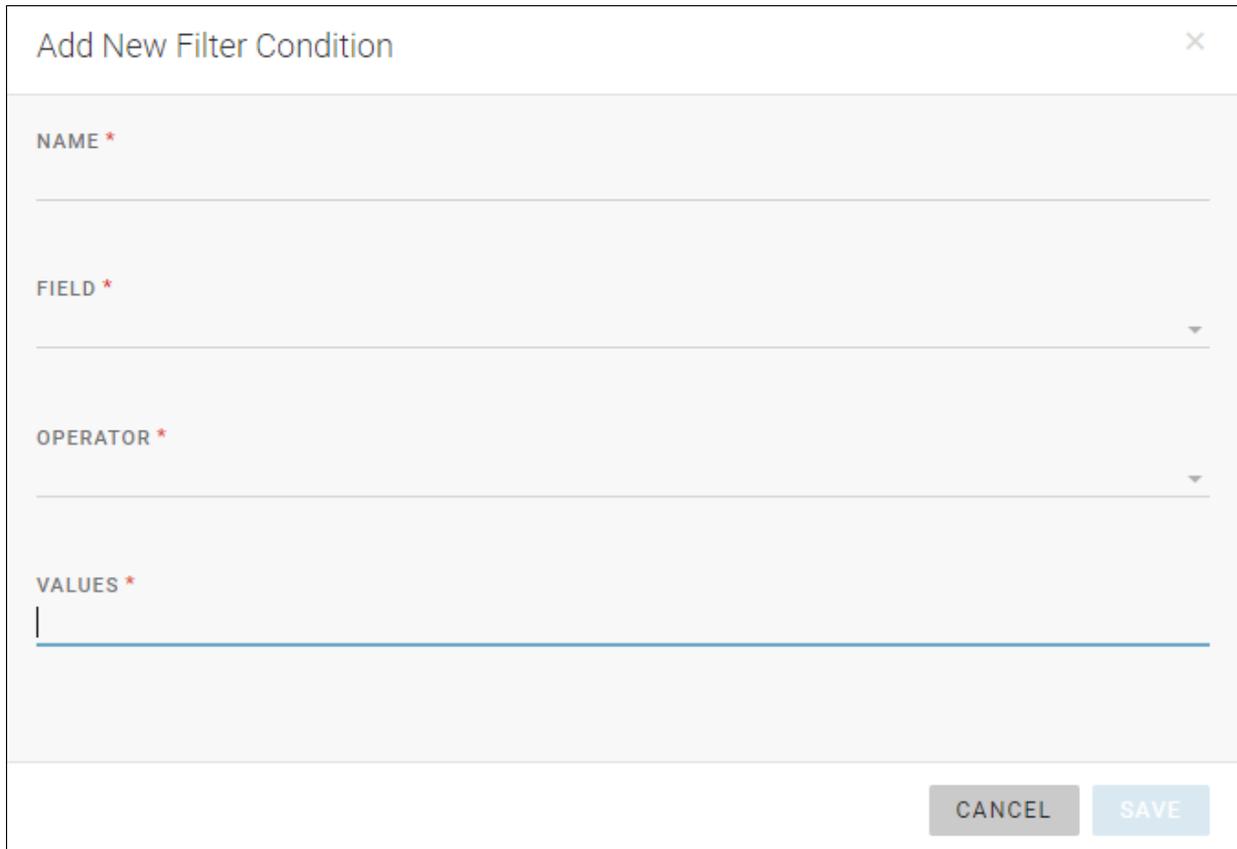
To get started with Content Filters, click on the *Hamburger menu* > *Settings* > *Content Filter*. You will notice that there are three tabs along the top of the Content Filters pane: Filters, Filter Conditions and Filter Search.



Before you can apply a Content Filter, you must first create at least one Filter Condition.



To create a new Filter Condition, click the *Filter Conditions* tab along the top of the pane, then click the **+ADD NEW** button in the top right corner. A new window will open.



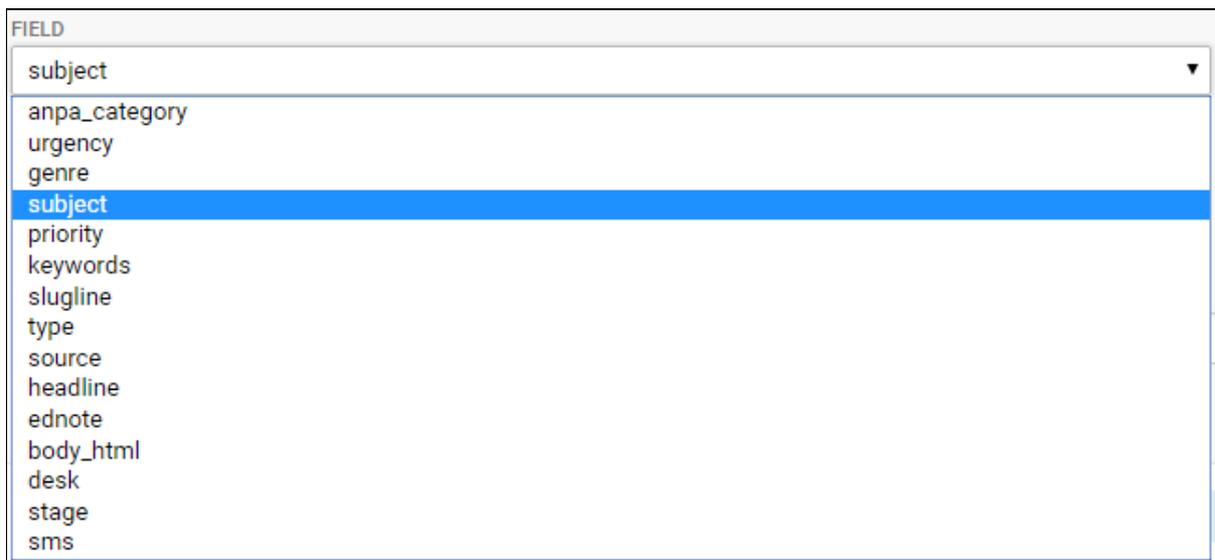
The screenshot shows a dialog box titled "Add New Filter Condition" with a close button in the top right corner. The dialog contains four input fields, each with a red asterisk indicating it is required:

- NAME ***: A text input field.
- FIELD ***: A dropdown menu.
- OPERATOR ***: A dropdown menu.
- VALUES ***: A text input field.

At the bottom right of the dialog, there are two buttons: "CANCEL" (disabled) and "SAVE" (active).

The NAME field is for labelling your filter condition. Using a descriptive NAME will help other users understand what your filter does.

The FIELD drop-down menu allows you to select which metadata fields of the item to look at when filtering. The complete list of your instance's available metadata fields is shown below:



The screenshot shows a dropdown menu titled "FIELD". The menu is open, displaying a list of metadata fields. The "subject" field is currently selected and highlighted in blue. The list of fields includes:

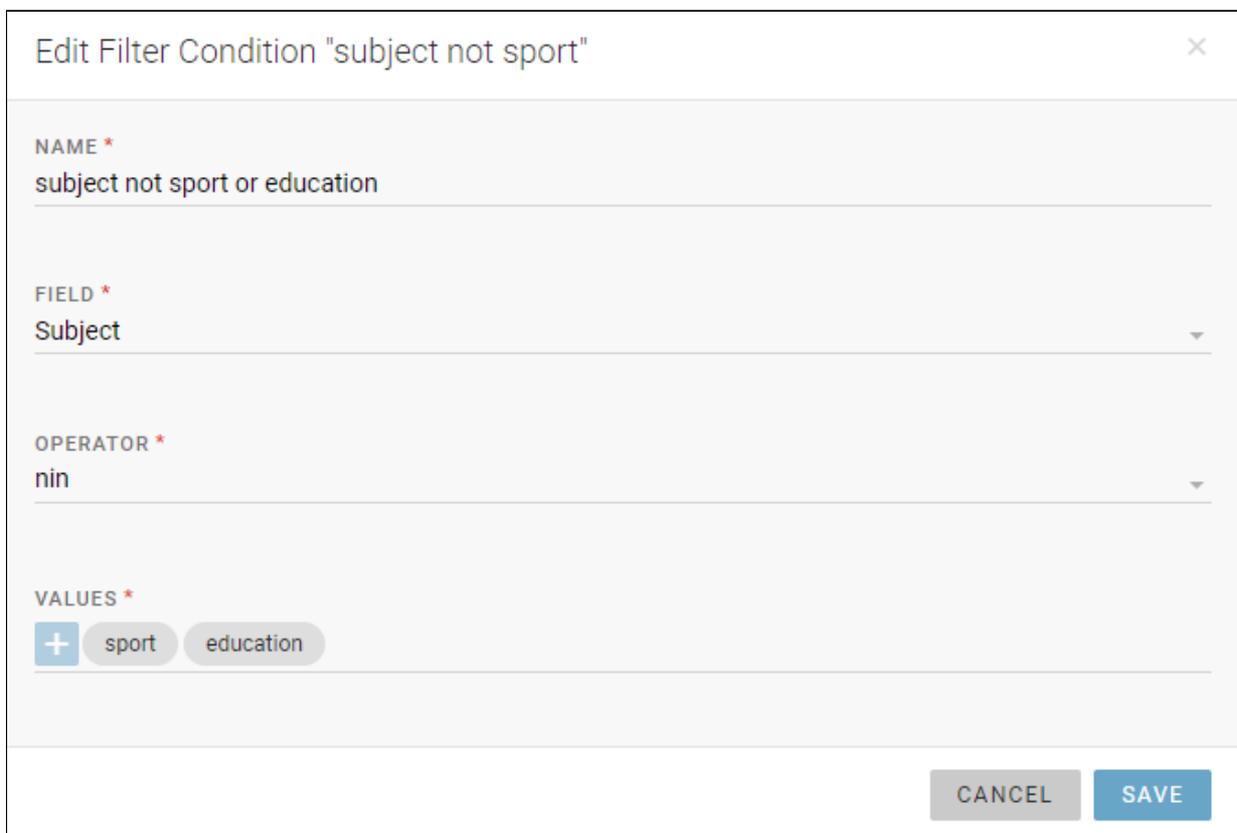
- subject
- anpa_category
- urgency
- genre
- subject
- priority
- keywords
- slugline
- type
- source
- headline
- ednote
- body_html
- desk
- stage
- sms

The OPERATOR field gives you logical operators to further define your condition. For fields where you select from controlled vocabularies (lists of items) it is simply: **in** or **nin** (not in), for

those fields that refer to text box metadata fields, there are more operators such as: **like**, **notlike**, **startswith**, and **endswith**. Depending on which field you have chosen, a different subset of operators will be available.



The VALUES selection will look different depending on which FIELD you have chosen. You might be required to input text, or you may need to choose a predetermined value from a drop-down menu. Note that if you select multiple values, the filter query will look for anything with either value 1 OR value 2.



In the example above, we have selected values from a predetermined list of subjects, which is our chosen FIELD. Click the square Create icon in the values section to add multiple values. In the example above, we are creating a content filter for items which have either sport or education as their subject.



To remove a value, mouse-over and click the 'x'.

Once you've entered your NAME, FIELD, OPERATOR and VALUES, save your Filter Condition.

Assemble and test Content Filters



To create a new Content Filter, click the FILTERS tab, then click the +*ADD NEW* button in the top right corner of the Filters tab.

Note that your Content Filters can be made up of a single condition or a set of multiple conditions. For clarity, the NAME for your Content Filter should reflect the types of conditions that it is using.

Add New Content Filter
✕

NAME

Maximum 80 characters.

Global Block

Archived Block

Block API

FILTER STATEMENT 1 ✕

FILTER PREVIEW CONTENT PREVIEW

_____ _____

FILTER PREVIEW

FILTER TEST

Use the article GUID for testing.

Global Block - When a filter is configured as a 'Global Block' the content it defines will be blocked by default to all Subscribers. It is unblocked for specific Subscribers by deactivating it on the Applied Global Block Filters tab of the Subscriber form.

Archived Block - 'Archived Block' allows definition of a filter or filters to control what content is actually sent to the Archive, and what is simply deleted on expiry. Some routine content or news items of ephemeral-interest may not be considered worth archiving.

A single Filter Statement can search for multiple overlapping conditions. You can set up the statement to search for more than one condition in a single operation by adding multiple conditions to the same Filter Statement. First, create a **Filter Statement 1** by selecting one of your previously created Filter Conditions. Then click on the **ADD** button within the filter statement box. You will see the filter conditions that you have already added at the bottom of the Filter Statement box.

NAME

GLOBAL BLOCK ARCHIVED BLOCK

FILTER STATEMENT 1 ×

FILTER CONDITIONS ADD CONTENT FILTERS ADD

FC: monsters × FC: New filter condition (Trump) ×

FILTER PREVIEW

[(slugline like "monsters") AND (body_html in "Trump")]

FILTER TEST TEST

ADD FILTER STATEMENT CANCEL SAVE

Clicking the *ADD FILTER STATEMENT* button at the bottom of the window will add another Filter Condition in a new statement. Each separate Filter Statement will give you another query in addition to the one that you have currently input.

Once you have input Filter Conditions, you will see text appear in the FILTER PREVIEW, below the filter statements. The conditions will be separated by **AND** or **OR** depending on if they were input in the same Filter Statement (AND) or separate Filter Statements (OR).

You can also use other Content Filters to create a query, and you can even combine multiple conditions with filters. (Condition X AND Filter Y). You can have any number of Filter Statements in a single Content Filter, but you can only apply one Filter per Product.

Testing the Content Filter

You can test the filter to ensure that it is working correctly. To do so, copy an article GUID (from the article information tab in the article editing window) and paste it to the Filter Test field at the bottom of the window. You will see if your target test article matches the Filter Condition or not.

FILTER PREVIEW

[(slugline like "monsters") AND (body_html in "Trump")]

FILTER TEST urn:newsml:localhost:2017-01-20T17:25:33.492558:17c035ed-0083-4926-9... **TEST**

Doesn't Match

ADD FILTER STATEMENT **CANCEL** **SAVE**

Filter Search

Along the top of the Content Filters pane, you will also see the Filter Search tab.

Filters **Filter Conditions** **Filter Search**

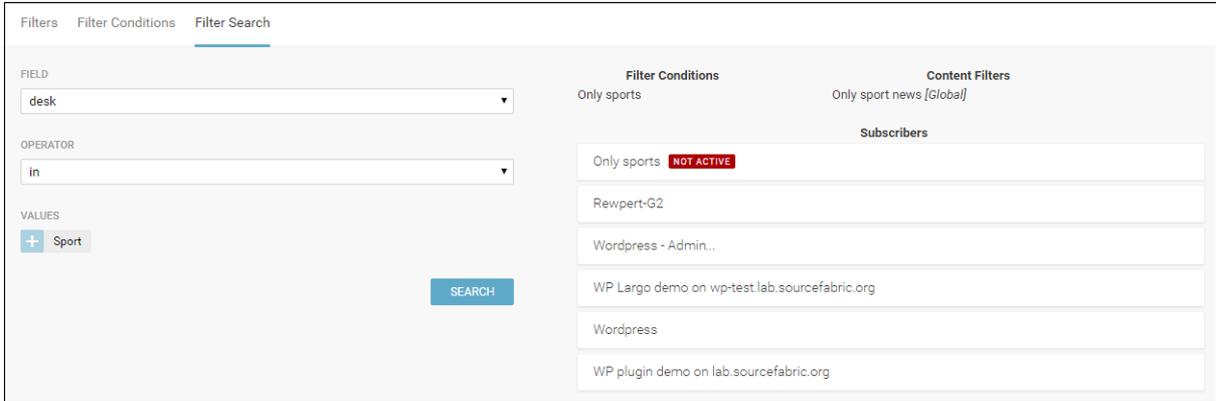
FIELD

OPERATOR

VALUES

SEARCH

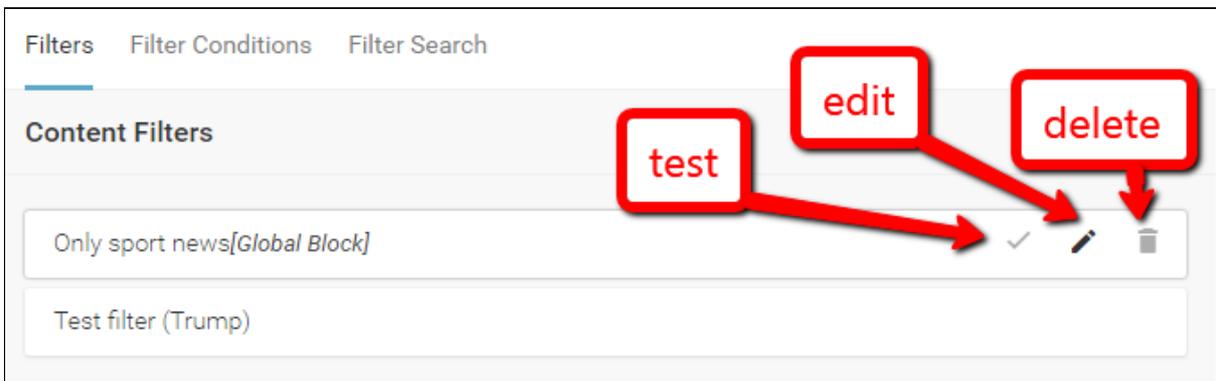
Filter Search is an important tool. This feature allows you to see which existing Content Filters contain your query Conditions. Superdesk will also show you if the defined query is currently being used, and if it is being used, where it is being used. This knowledge is especially important if you decide to edit or delete a Filter Condition.



Select your FIELD, OPERATOR and VALUE used to create the Condition, then click the **SEARCH** button. To the right, you will see which Conditions are associated with your query, which Content Filters contain those conditions, and which Subscribers are using those Content Filters.

Edit, test or delete an existing Content Filter

Once you've created your Content Filter, you will see it appear in the Filters tab. Hovering over the Filter will show you options to test, edit or delete your Filter.



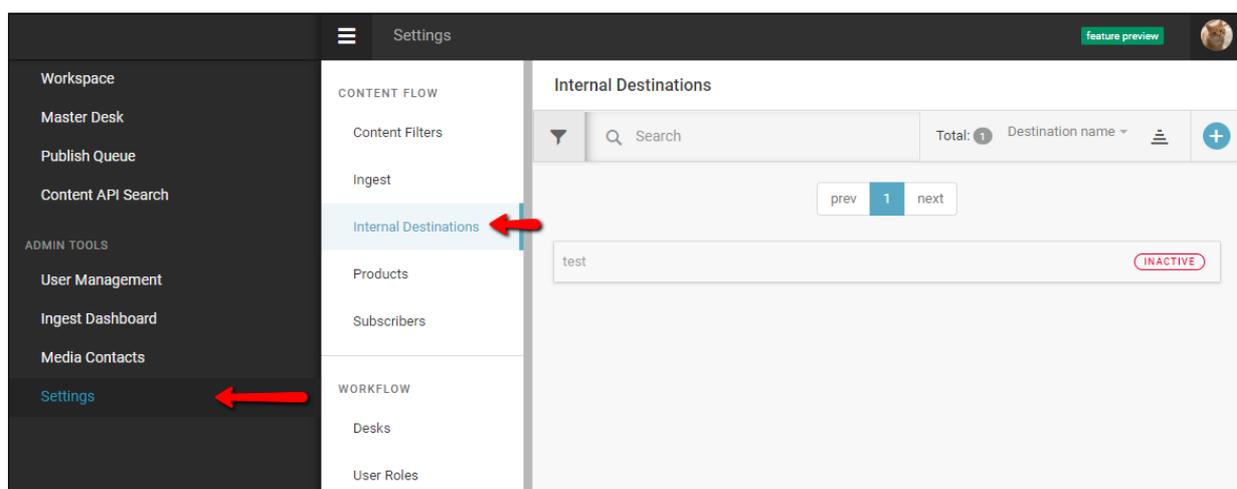
Testing the Content Filter using this checkmark icon will open a new window to display a list of all articles that match the Filter conditions. You can also view a list of articles that do not match by clicking on the Non-Matching parameter, displayed below.



Internal Destinations

The Internal Destinations feature allows you to route a copy of a published article to Desk(s). This allows you to reuse content without having to create it again from scratch. There are several reasons you might want to set up Internal Destinations. Some common uses of Internal Destinations include making it available to translators in a ready-to-use format or creating shortened versions of news items for further distribution.

To configure an Internal Destination, select the *Hamburger menu* > *Settings* > *Internal Destinations*.



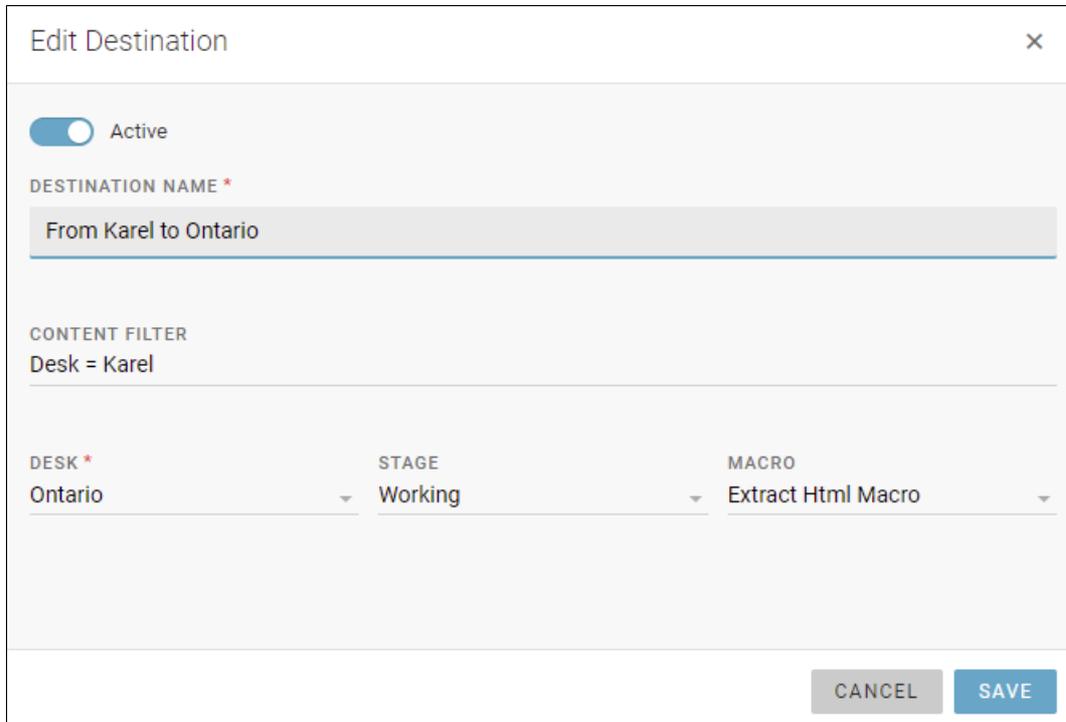
When you publish a news item in Superdesk, if you have Internal Destinations configured, the article will not only be published to your subscribers, but also to the designated Desk(s) as defined by these settings.

Generally, Publishing sends the news item to a Destination in a specific output format. With Internal destinations, the story being published is **copied and sent to a selected Desk**. In both cases, the story is first checked against Content Filters and the publishing action is performed only if the content matches the filter criteria.

Users can select the Desk, Stage, and a macro to be run on the content (optional). The macro is usually used to modify the content (e.g. changes its metadata).



To create an Internal Destination, click the Create icon in the top-right corner of the Internal Destinations pane.

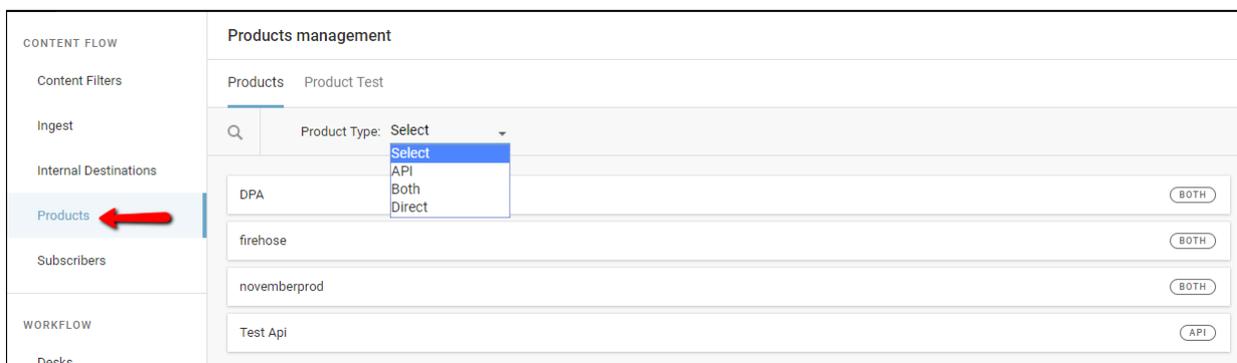


In the example above, the news items matching the "Desk = Karel" Content Filter will be copied and sent to the "Ontario" Desk: "Working" Stage, and an "Extract Html Macro" macro will be applied. In other words, everything published from the Desk Karel will be sent to Desk Ontario, and modified by a macro.

Internal Destinations can be enabled or disabled using the *Active* toggle at the top of the Edit Destination window.

Creating Products

Products can be thought of as another layer of Content Filters. A typical Product might be the same as the application of Content Filter before an item gets published. However within the Product interface, you can further define the Product by adding a territorial restriction. Within the Products section, you can also apply the inverse of a Content Filter by saving it as a "blocking" filter.



You can access the Products menu from the Hamburger menu, then select Settings > Products.

The Product Management pane will display a list of your current Products. From here, they can be edited if you mouse-over them and click the pencil icon.



To get started creating new Products, click on the +ADD NEW button in the top right corner of the Product Management pane.

The simplest version of a Product would be "use no filters" Product. You only need to give it a name and then all content that you publish will be a part of your Product.

Add New Product
×

Product Details
Subscribers

PRODUCT NAME *

PRODUCT DESCRIPTION

PRODUCT TYPE *

PRODUCT CODES

Comma separated values.

CONTENT FILTER

TARGET REGIONS

CANCEL
SAVE

Product Name - Superdesk-internal name. The name you give your Product will not be seen by Subscribers.It’s for Superdesk-internal use only. This field is mandatory.

Product Description - Superdesk-internal description. It is usually used to communicate which Filters are being applied to this Product, and maybe which regions are being targeted. This field is not mandatory, but suggested.

Product Type- Choose between API, Direct or Both.

Product Codes - Allow the assignment of proprietary/niche content descriptors and designators. For example, our client AAP currently uses them to implement our 'selector code' product permissioning system, but they could as easily be used with any private or public categorisation scheme to provide further service definition for upstream use.

Content Filter - You can only apply one filter per Product. If you need to filter multiple conditions you must set that up within the Content Filter section. (In that case, select Hamburger menu > Settings > Content Filters.) If you don't assign any Content Filter, every item that is published in your Superdesk instance will be sent to your subscribers. Content Filters are not mandatory. If you select a Content Filter in this step, you will need to also select a Content Filter type: Permitting or Blocking.

Content Filter Type - A **permitting filter** will allow only articles defined by the conditions to be selected as part of the product. A **blocking filter** will prevent all the articles that match the conditions from being selected. In this case, it would be ***all but Filter XY***.

Target Regions - If your version of Superdesk is configured with regions, you can use this drop-down menu to further define your Product. Only regions selected here would receive your Product.

Define Subscribers

Admins can set up Subscribers by accessing the Hamburger menu, then click on *Settings > Subscribers*.

In the Content Flow section of the Settings menu, users can define:

- Subscribers (to whom)
- Products (what they should receive, application of content filters, regional restrictions)
- Destinations (where to send it)
- Formats (how it should be send)

Subscribers are customers. Each Subscriber can receive a mixture of Products, to any number of Destinations. A Subscriber can also be another distribution system or systems. For a digital publisher, the Subscriber can be a website, mobile app or other asset.



To define your Subscribers, click on the *Hamburger menu > Settings > Subscribers*. Click on the **+ADD NEW** button in the top right corner of the corner of the Subscribers pane.

Note that many of the values in these menus can be configured to suit your company's particular needs. The fields and values available in the form for Subscribers are defined in `.../server/data/vocabularies.json` file.

This file contains controlled vocabularies (mainly lists of metadata). The Subscribers are under `subscriber_types` definition and specifies the types and formats available. Example: `{"is_active": true, "name": "All", "qcode": "all", "formats": [{"name": "NTBNITF", "qcode": "ntbnitf"}, {"name": "NINJS", "qcode": "ninjs"}, {"name": "AAP NewsML 1.2", "qcode": "newsml12"}, {"name": "NewsML G2", "qcode": "newsmlg2"}]}`

Below is an example of a typical new Subscriber window, and descriptions of the various fields you might find:

The screenshot shows a window titled "Add New Subscriber" with a close button (X) in the top right corner. Below the title bar are three tabs: "General" (selected), "Critical Errors", and "Applied Global Block Filters".

The form contains the following fields and controls:

- Status:** A toggle switch currently turned off.
- NAME *:** A text input field.
- E-MAIL TO BROADCAST KILL EVENTS *:** A text input field.
- TARGET TYPE *:** A dropdown menu.
- MEDIA TYPE:** A dropdown menu with "Both" selected.
- SUBSCRIBER CODES:** A text input field with the hint "Comma separated values".
- Targetable by users:** A toggle switch currently turned on.
- PRODUCTS:** A button with a "+" sign.
- SEQUENCE NUMBER SETTINGS *:** Two text input fields labeled "Minimum" and "Maximum".

At the bottom right of the form are two buttons: "CANCEL" and "SAVE".

Status: Active / inactive switch.

Email to broadcast kill events: Email address used to send notifications on "killed" articles. This is used by some organisations in case they want to recall a story and notify their subscribers. If you do not plan to use "kills", simply fill in any email address in a valid format. You must fill out an email address in this field.

Target type: The target type drop-down menu is configured to suit your particular situation. In the example above you can choose between digital targets, paper targets, or both.

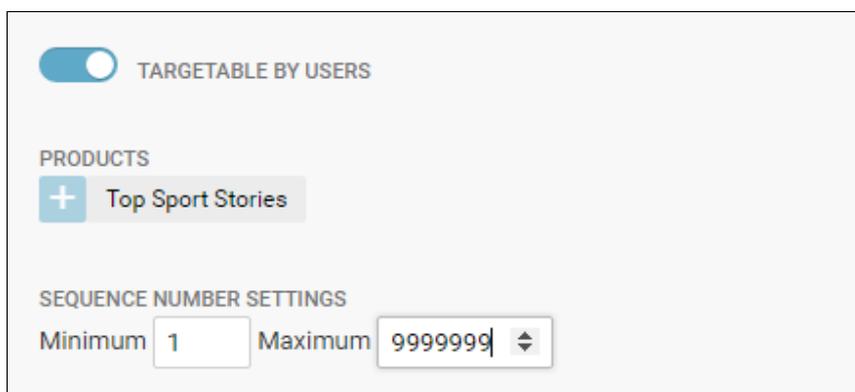
Media type: The media type drop-down menu is configured to suit your particular situation. For example, you might choose between media and non-media types. Media customers might include newspapers, magazines, news websites, etc. Non-media types might include banks, governments, businesses. Depending on your definitions, you can also use this drop down menu to distinguish between a free and paid website, etc.

Subscriber Codes: These provide a way of assigning a subscriber-specific token or key for use by upstream distribution platforms.



Targetable by Users: Enabling this toggle lets editors select the Subscriber when they create a story and send it to the Subscriber directly even if the story doesn't match any of the Products (Content Filters) that the Subscriber set up to receive.

Products: You can select multiple products from this list. As noted in the previous section, Products are applications of Content Filters and regional restrictions. If you don't select any Product here, all news items that are published can be sent to this Subscriber.



Sequence number settings: Sequence numbers are a range of IDs in the Publish Queue. These Transmission Sequence Numbers are intended to be passed to end users as part of the delivered document format. Historically they provided a way for a Subscriber to detect a break in transmission continuity on a given wire and quote back to the source the range of sequence numbers missed so that a retransmission could be arranged. Nowadays they are largely called for in order to support legacy data formats which expect a sequence number (for example: ANPA 1312 and IPTC 7901), although they can also be used in the construction of some of the metadata required within NewsML. Conventionally sequence numbers would run either 1-999 or 1-9999 with a rollover at either the upper numerical limit, or at midnight each day. It was considered good practice to not have a sequence number repeated within a 24 hour news cycle, and this would usually dictate both the upper numerical value and the rollover method chosen.

The screenshot shows a form titled "DESTINATIONS". At the top, there is a light blue box with the text "For Content API only subscriber destinations are not required." Below this, there are four input fields: "NAME *" (a text box), "FORMAT *" (a dropdown menu), "PREVIEW ENDPOINT URL" (a text box), and "DELIVERY TYPE *" (a dropdown menu). At the bottom right of the form, there are two buttons: "CANCEL" and "SAVE".

Destination: Destinations are the *where* in the publishing process. You can have multiple destinations for one Subscriber.

The screenshot shows a dropdown menu titled "DELIVERY TYPE". The menu is open, displaying a list of options: "FTP", "Email" (which is highlighted with a blue background), "ODBC", "File", "Pull", and "HTTP Push".

Delivery Type: You can select from the previously configured formats and delivery types (pictured above). Depending on your selection, you may have additional fields to define.

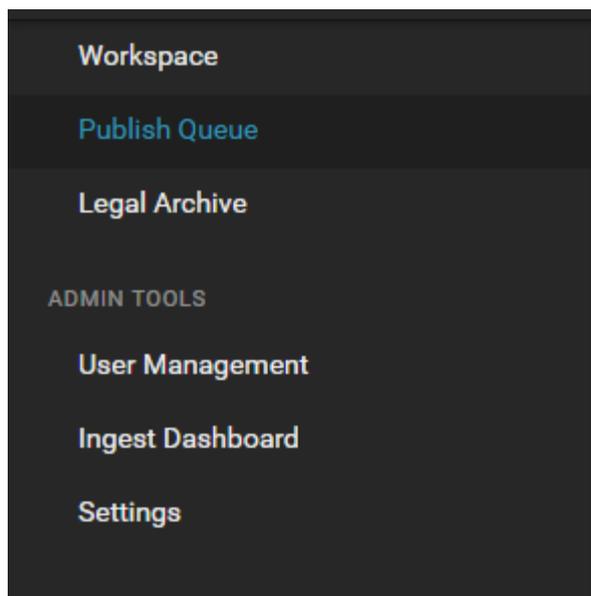
To add an additional Destination, click on the + *ADD NEW DESTINATION* button at the bottom of the Add New Subscriber window. Note that for Content-API-only Subscribers, you are not required to add a Destination.

Publishing your news items

You are now ready to publish your news items! When you click the PUBLISH button in Superdesk, it will send your news items through the Content Filters to determine which Subscribers will be sent the news item that you've published. You can check the Publish Queue for further details about the Headline, Destination, Subscriber and status.

Publish Queue

The Publish Queue contains a list of all published items and their associated destinations. Depending on user permissions, not all users will be able to access the information in the Publish Queue. Users can access the Publish Queue from the Hamburger menu in the top-left corner of the Superdesk interface.



If an article failed to publish successfully, you will see that recorded in the Publish Queue and you have the option to resend the item directly from the Publish Queue panel.

When content is labeled as "published" in Superdesk, it only means that somebody hit the *PUBLISH* button. If the news item doesn't pass through Content Filters, get assigned to a Product and Subscriber with a Destination, the content stays in Superdesk but can still be marked as published within the Monitoring view.

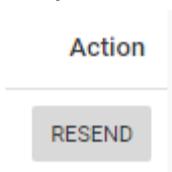
The Publish Queue gives Superdesk users an overview on what has been sent out, and what has actually been received by your Subscribers.

Sequence No	Unique Name	Headline	Content Type	Publishing Action	Subscriber	Ingest Provider	Destination	Queued at	Scheduled at	Transmitted at	Status	Message	Action
<input type="checkbox"/> 2	#4	TEST headline (update 1)	text	published	NTB FTP		NTB FTP	09.01.2017 15:48:06		09.01.2017 15:48:11	success		RESEND
<input type="checkbox"/> 1	#3	TEST headline	text	published	NTB FTP		NTB FTP	09.01.2017 15:39:28		09.01.2017 15:39:31	success		RESEND

Within the Publish Queue can see and search for published content items. You can also search by Subscriber, Destination, and their publishing status. Within the Publish Queue, you can also cancel or resend the items.

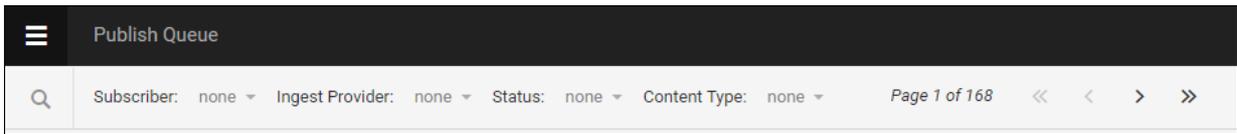
Sequence No	Unique Name	Headline	Content Type	Publishing Action	Subscriber	Ingest Provider	Destination	Queued at	Scheduled at	Transmitted at	Status	Message	Action
<input type="checkbox"/> 181	#880	Test: Multiple images	text	published	Wordpress		Doug email test	01.12.2016 10:30:06		01.12.2016 10:30:17	success		RESEND
<input type="checkbox"/> 180	#880	Test: Multiple images	text	published	Wordpress		wp.lab.sourcefabric.org	01.12.2016 10:30:06		01.12.2016 10:30:17	success		RESEND
<input type="checkbox"/> 179	#885	Test: Multiple images	composite	published	Wordpress		Doug email test	01.12.2016 10:30:06		01.12.2016 10:30:15	success		RESEND
<input type="checkbox"/> 178	#885	Test: Multiple images	composite	published	Wordpress		wp.lab.sourcefabric.org	01.12.2016 10:30:06		01.12.2016 10:30:15	success		RESEND
<input type="checkbox"/> 42	#880	Test: Multiple images	text	published	Rewpert-G2		Rewpert-G2 test	01.12.2016 10:30:06			failed		RESEND
<input type="checkbox"/> 41	#885	Test: Multiple images	composite	published	Rewpert-G2		Rewpert-G2 test	01.12.2016 10:30:06			failed		RESEND
<input type="checkbox"/> 45	#880	Test: Multiple images	text	published	Wordpress - AdminIT		AdminIT Wordpress plugin	01.12.2016 10:30:06		01.12.2016 10:30:17	success		RESEND
<input type="checkbox"/> 44	#885	Test: Multiple images	composite	published	Wordpress - AdminIT		AdminIT Wordpress plugin	01.12.2016 10:30:06		01.12.2016 10:30:15	success		RESEND

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.

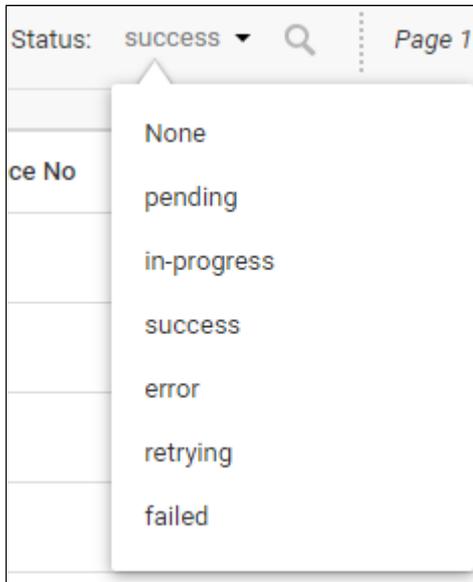


The action column on the far right of the article entry has a button to resend an article. It is possible to resend articles that have successfully published, as well as items that have failed to publish. **If you choose to resend an article, the Unique Name identifier will stay the same, but a new sequence number will be assigned.**

Clicking on an article in the Publish Queue will open a tab on the right with an article summary. You will see tabs for item content, metadata, duplicates and full item history. Note that items cannot be edited from the Publish Queue.



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



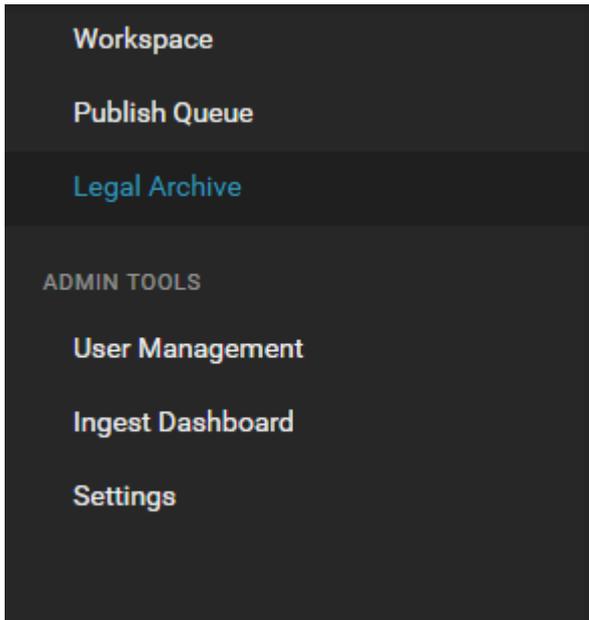
Sort the view order of the news items in the Publish Queue list, by clicking the Subscriber, Ingest Provider, Content type, or Status drop-down menus along the top of the Publish Queue window and selecting from the displayed options. For example, the Status drop-down menu is displayed above.

Search the Publish Queue by clicking on the search icon and inputting keywords from the article headline.

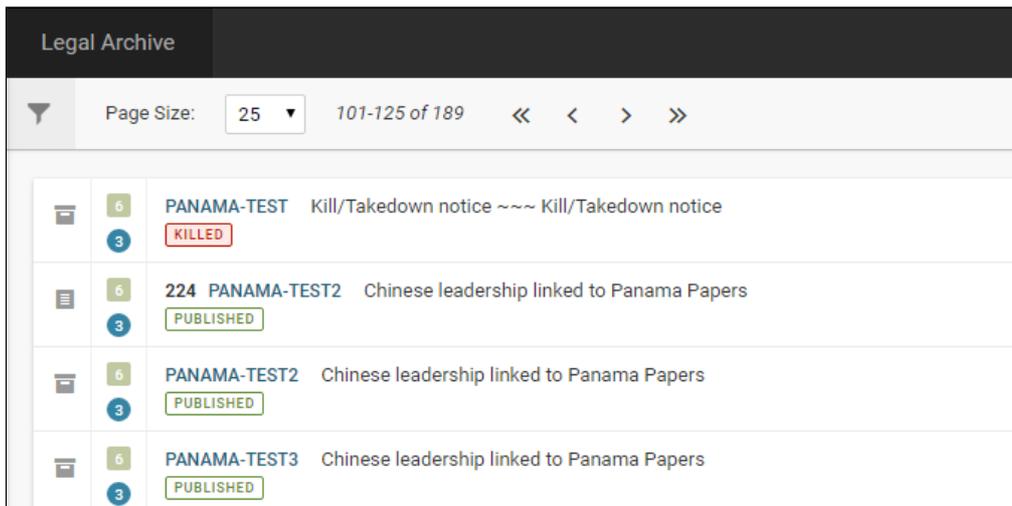
Legal Archive

Your Superdesk instance might also include a Legal Archive. As with most modules within Superdesk, the Legal Archive is an optional addition to the interface. Your particular instance of Superdesk might **not** include the Legal Archive.

The Legal Archive is an immutable forensic record of every item published, from its ingest or creation and including every subsequent edit action: what was changed, when and by whom. This archive is kept as an evidential record to use in cases of commercial dispute or legal action.

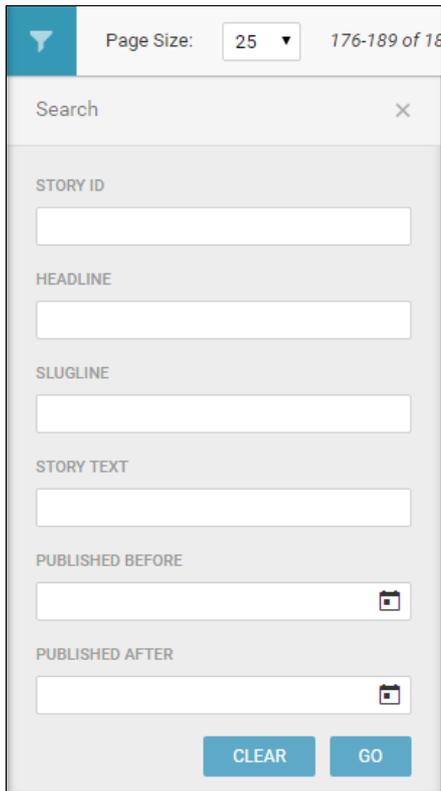


Admin users can access the Legal Archive from the Hamburger menu in the top-left corner of the Superdesk interface.

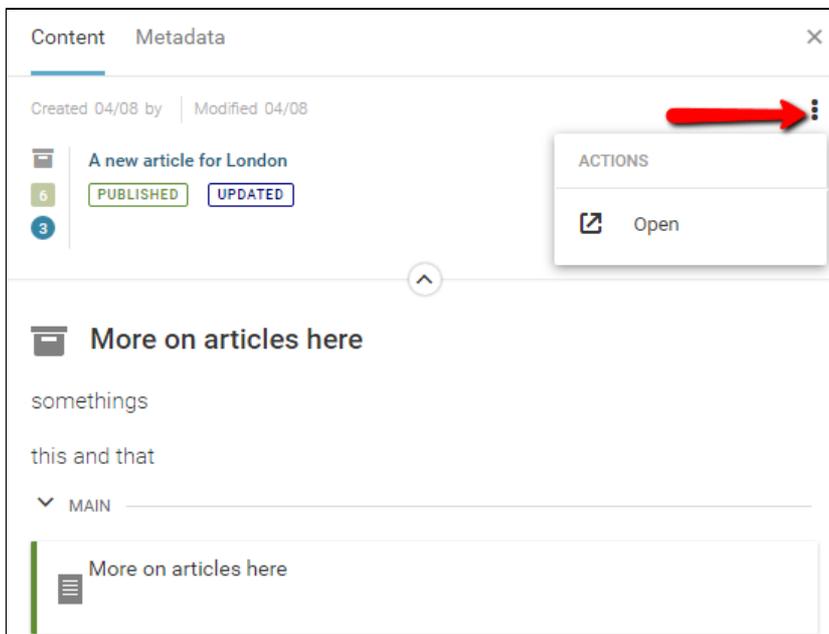


This is the Advanced Search icon.

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



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 at the top of the search window.



Just as with other list views within Superdesk, articles from the Legal Archive can be previewed by left-clicking on them once. 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.

Content Configuration

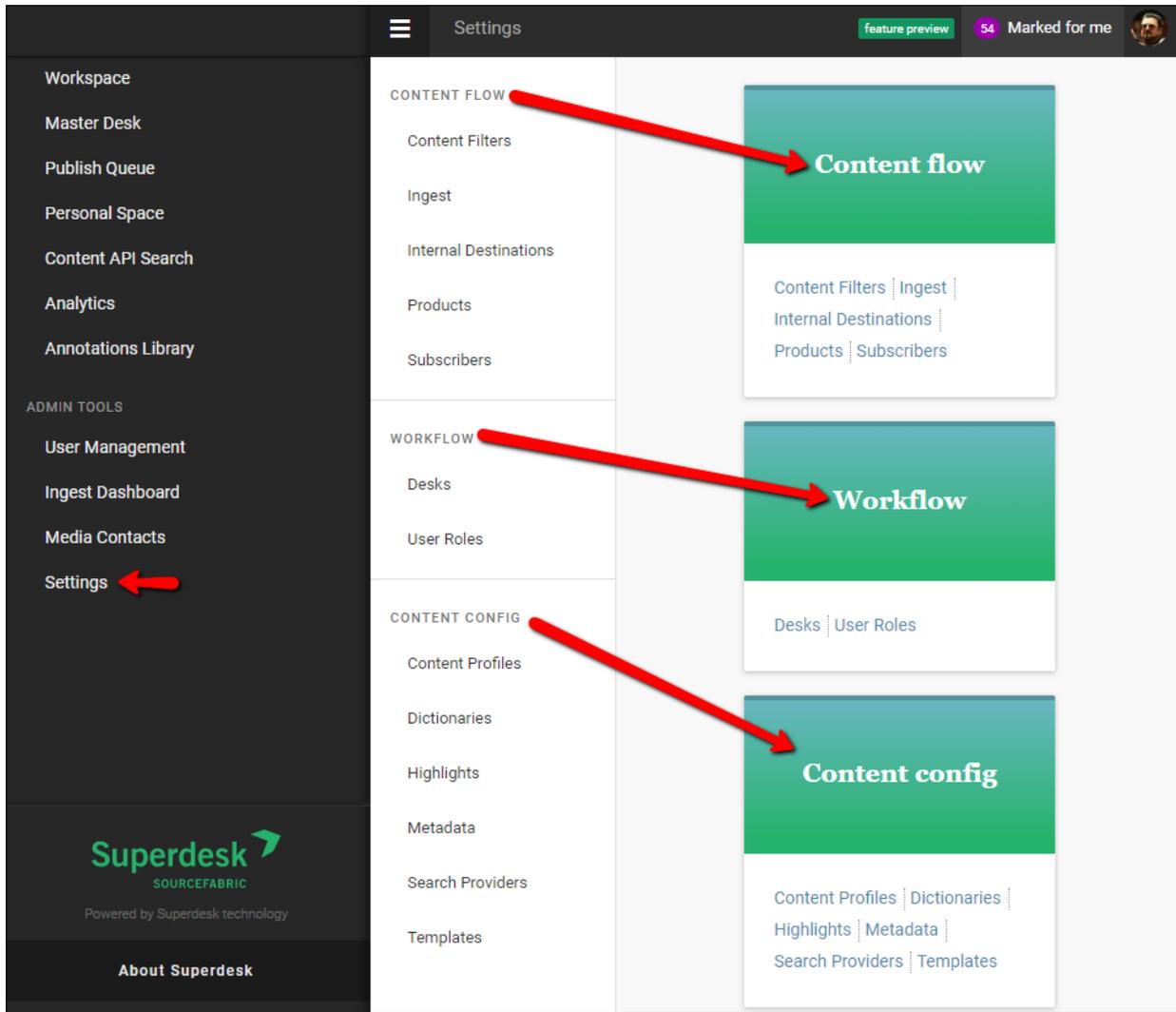
The Superdesk Hamburger menu is where most of the newsroom workflow is set up. In the Admin tools section, under the Settings heading is where you can create Desks and Stages, manage Content Profiles, create Highlight lists, set default user privilege profiles, edit your Subscribers, create Templates and more.

There are three sections within the Settings area: **Content Flow**, **Workflow**, and **Content Configuration**.

The **Content Flow** section contains settings pertaining to how news items move from Superdesk to your customers or other Superdesk-internal locations (Internal Destinations). You will find the features in this section described in the Superdesk [Publishing chapter](#).

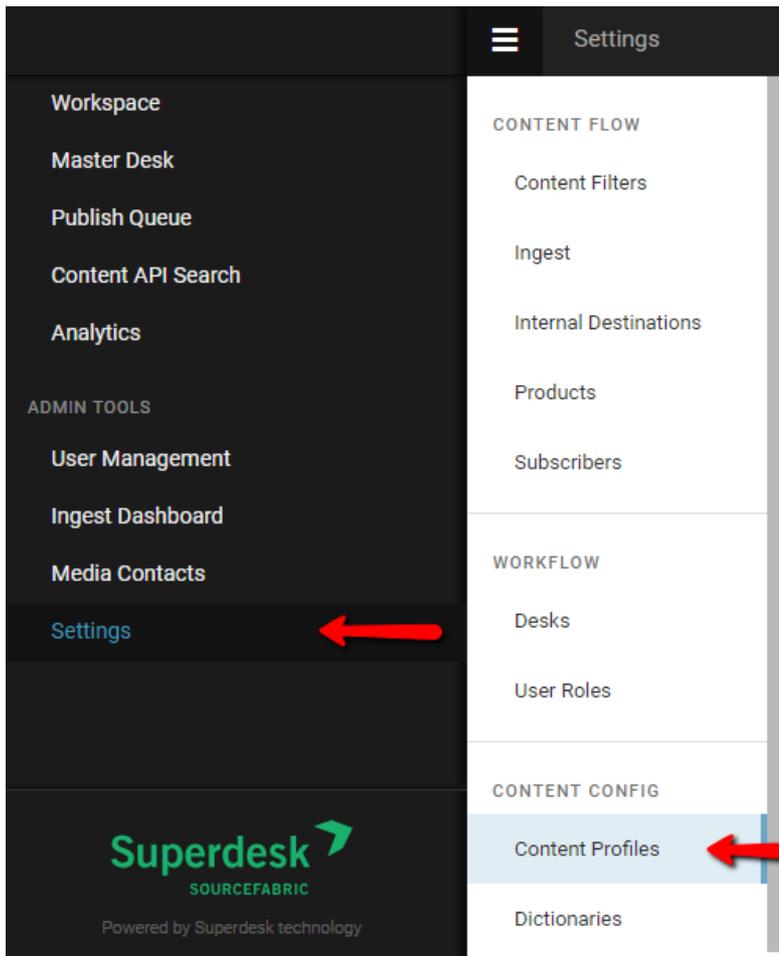
The **Workflow** section contains settings pertaining to [user roles](#), [desk creation and desk stages](#).

The **Content Configuration** section contains settings pertaining to metadata fields for new item creation, highlight creation, templates and vocabularies. The content configuration section of the Settings menu is described below:



Content Profiles

Content Profiles are used to define metadata for new item creation. Content Profiles determine which fields are available, and which fields are required when a news item is created.



To get started with Content Profile creation, click the Hamburger menu, then select *Settings > Content Profiles*.



Admins can create new Content Profile templates by clicking on the +ADD NEW button at the top right of the Content Profiles tab.

Add New Content Profile ✕

LABEL
Sports Stories

DESCRIPTION
Content Profile for news items on the Sports desk.

SAVE & CONTINUE **CANCEL**

The first step is to assign your new Content Profile with a name and a description. Once you have entered those, and pressed the *SAVE & CONTINUE* button, you will then be able to customise the metadata and fields in the next window.

Editing "Sports Stories" ×

LABEL
Sports Stories

DESCRIPTION
Content Profile for news items on the Sports desk.

Active

Editor3

Header fields Content fields Widgets

Slugline

REQUIRED

ORDER

LENGTH min: Not set max: 24

WIDTH ▼

CLEAN PASTED HTML

keywords

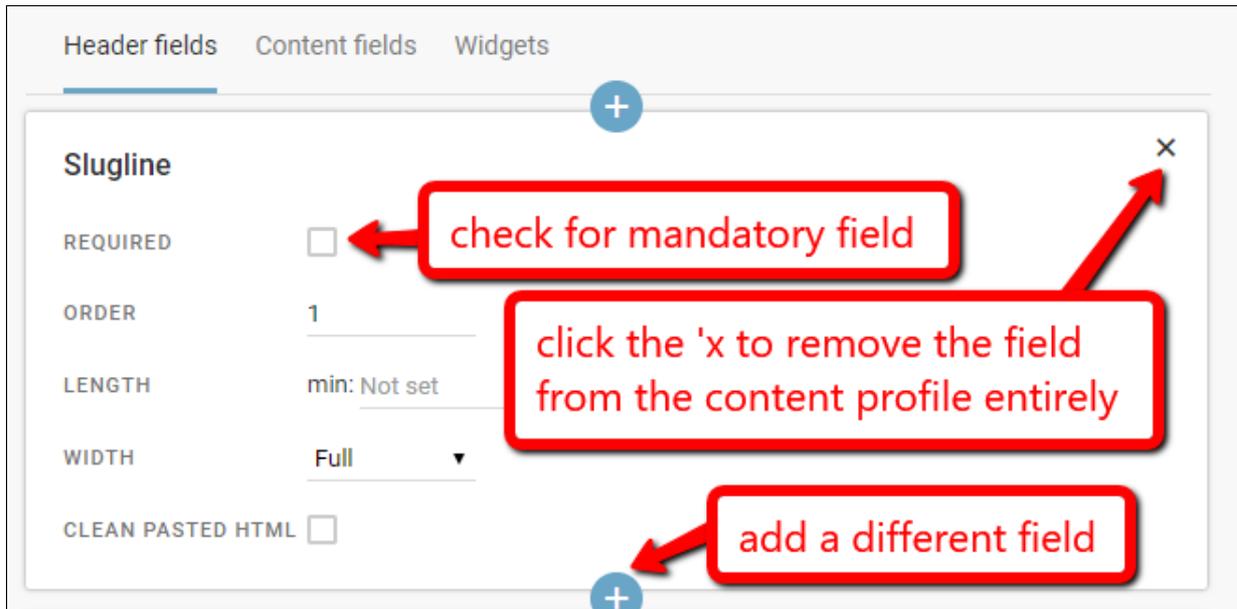
REQUIRED

ORDER

SAVE CANCEL

You will see three tabs in the middle of the Edit Content Profile window: Header Fields, Content Fields and Widgets.

- **Header fields** are fields that are not transmitted to readers. These fields are mostly used for Superdesk-internal communication.
- **Content fields** are fields that are transmitted to readers.
- **Widgets** tab dictates which items are present in the Editor Sidebar of the article creation window.



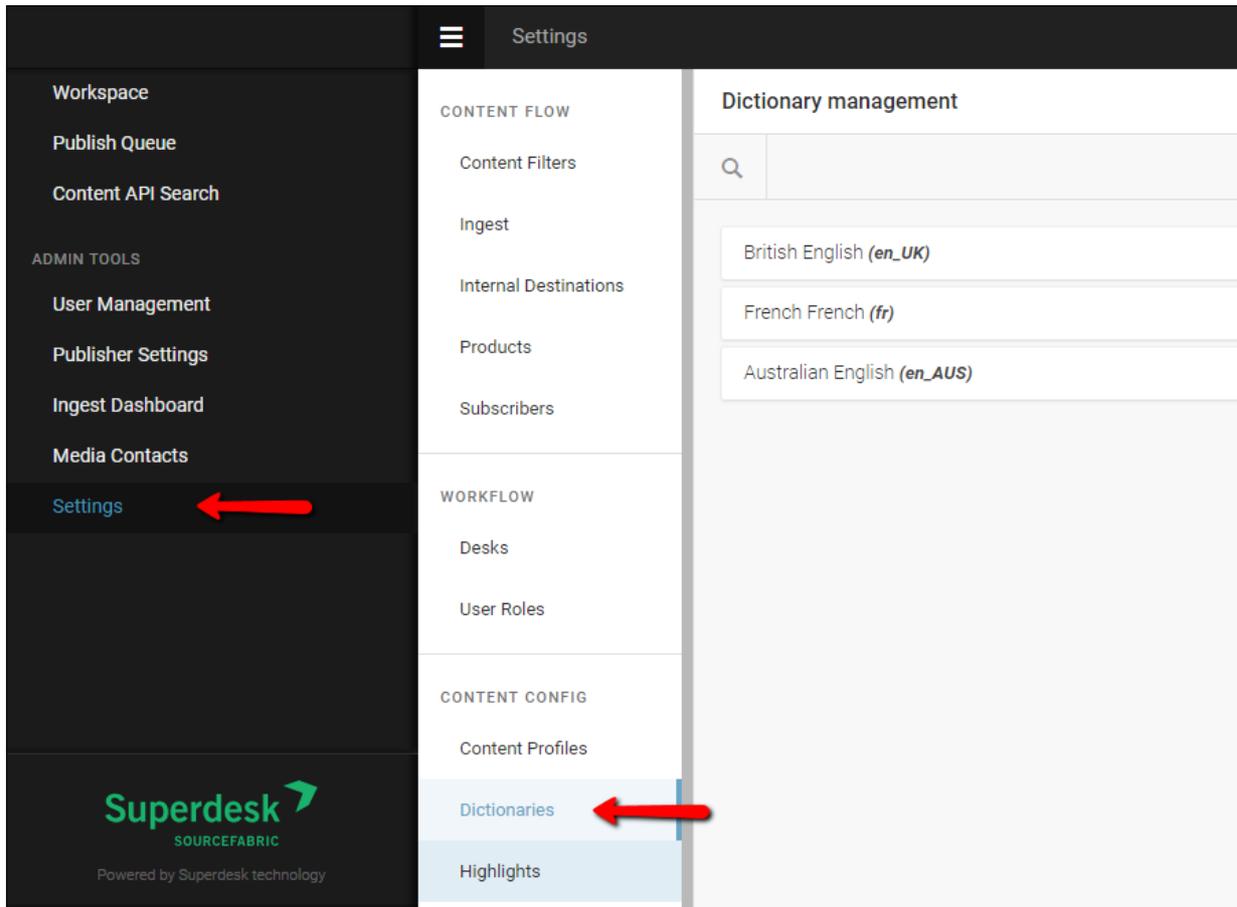
You can specify there is a mandatory field, by clicking on the 'Required' checkbox. For most text fields, you can also specify a minimum and maximum character length. Clicking the Create icon above or below each field allows you to add additional fields. Custom fields can be configured by selecting *Hamburger menu > Settings > Metadata*.

Dictionaries

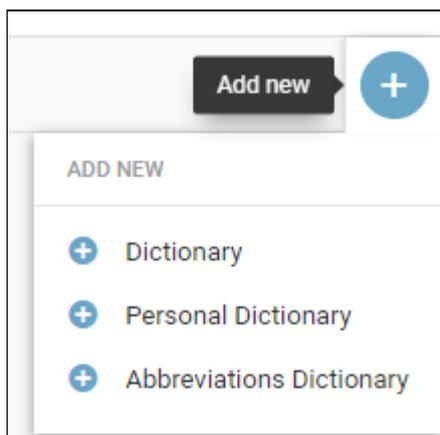
The Dictionaries tab allows you to select which dictionary Superdesk will use for internal spell check. Superdesk allows admins and users to use multiple dictionaries for spell checking.

If you prefer not to use the Superdesk-internal Spell Check described below, Superdesk can also be integrated with 3rd party tools such as [Tansa](#).

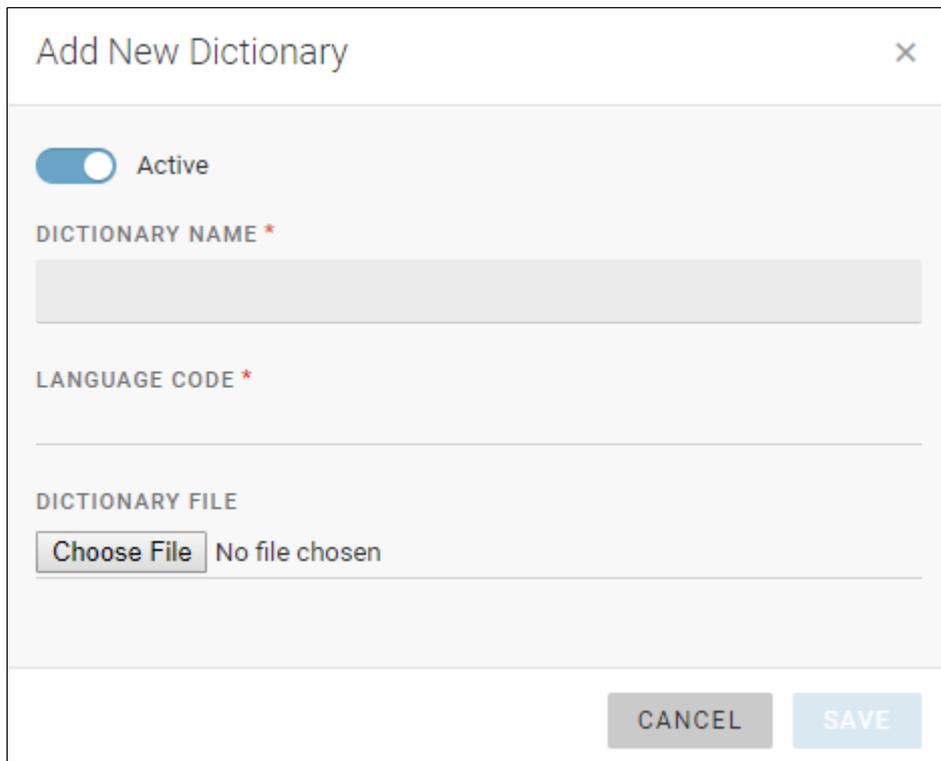
To configure a Superdesk-internal Spell Checker, select the *Hamburger menu > Settings > Dictionaries*, as shown below.



Clicking the Create icon in the top-right corner of the Dictionary Management pane will give you the option to add a global dictionary, a personal dictionary, or an abbreviations dictionary.



In the Add New Dictionary window, you will need to add a unique name and ISO language code in the textboxes provided. You can [check a list of language codes](#) if you are unsure of which code to use. Any global dictionary or personal dictionary will also require you to upload a reference file. **Dictionary files must be in .txt format, with one entry per line.**



The screenshot shows a dialog box titled "Add New Dictionary" with a close button (X) in the top right corner. The dialog contains the following elements:

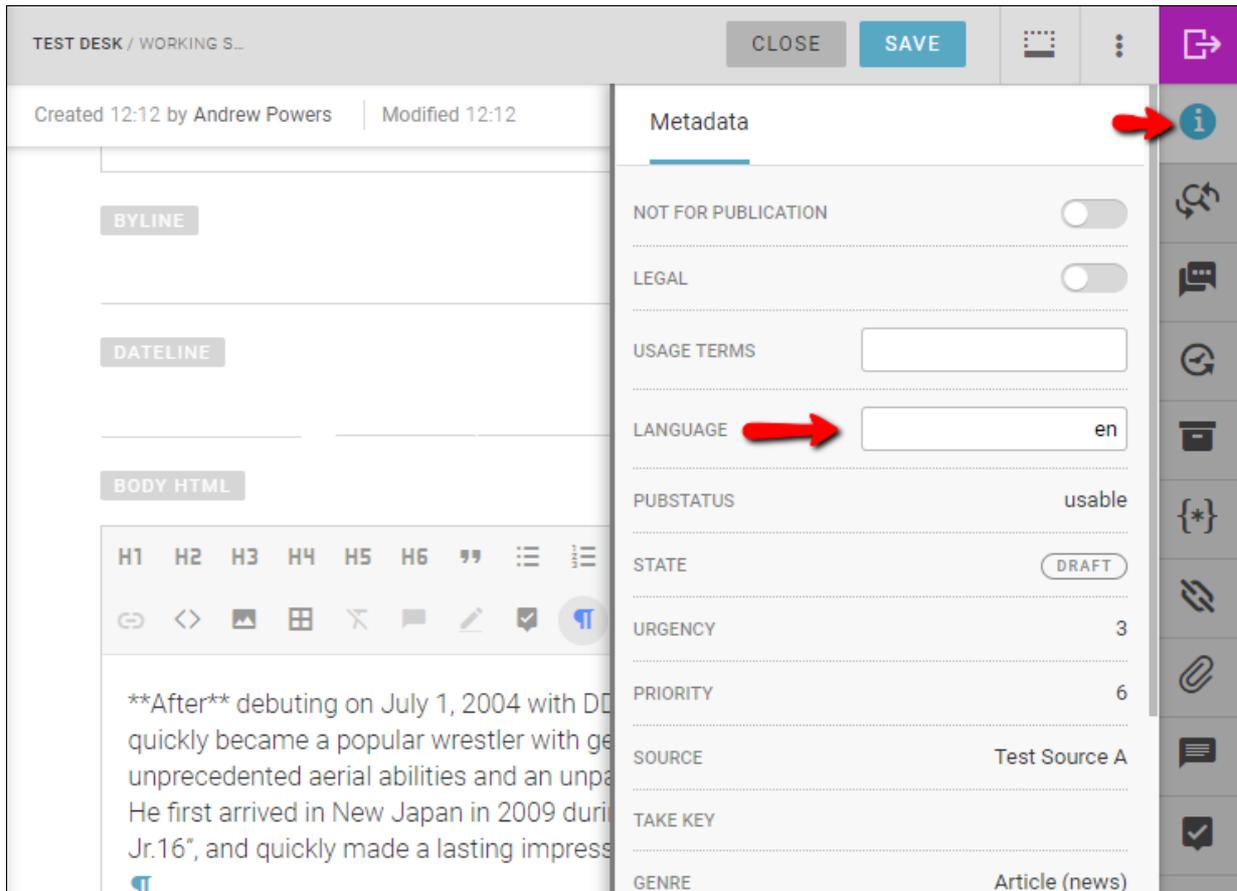
- A toggle switch labeled "Active" which is currently turned on.
- A text input field labeled "DICTIONARY NAME *".
- A text input field labeled "LANGUAGE CODE *".
- A file selection area labeled "DICTIONARY FILE" containing a "Choose File" button and the text "No file chosen".
- At the bottom right, there are two buttons: "CANCEL" and "SAVE".

Personal dictionaries are only available for the user that creates it, whereas global dictionaries are available for all Superdesk users in your organization. Once created, you may need to **logout** and then log back in to begin using the newly created dictionary.

Don't forget to set the dictionary to active using the toggle at the top of the dictionary configuration window.

It is possible to have multiple dictionaries with the same language code; for example, a medical dictionary, and a general one. When checking articles, Superdesk will use all of the active dictionaries that match the news item's language code concurrently. (Note the toggle at the top of the dictionary configuration window can be used to temporarily disable a dictionary).

You can view your news item's current language code by using the *information button* in the Editor Sidebar when you are editing an article.

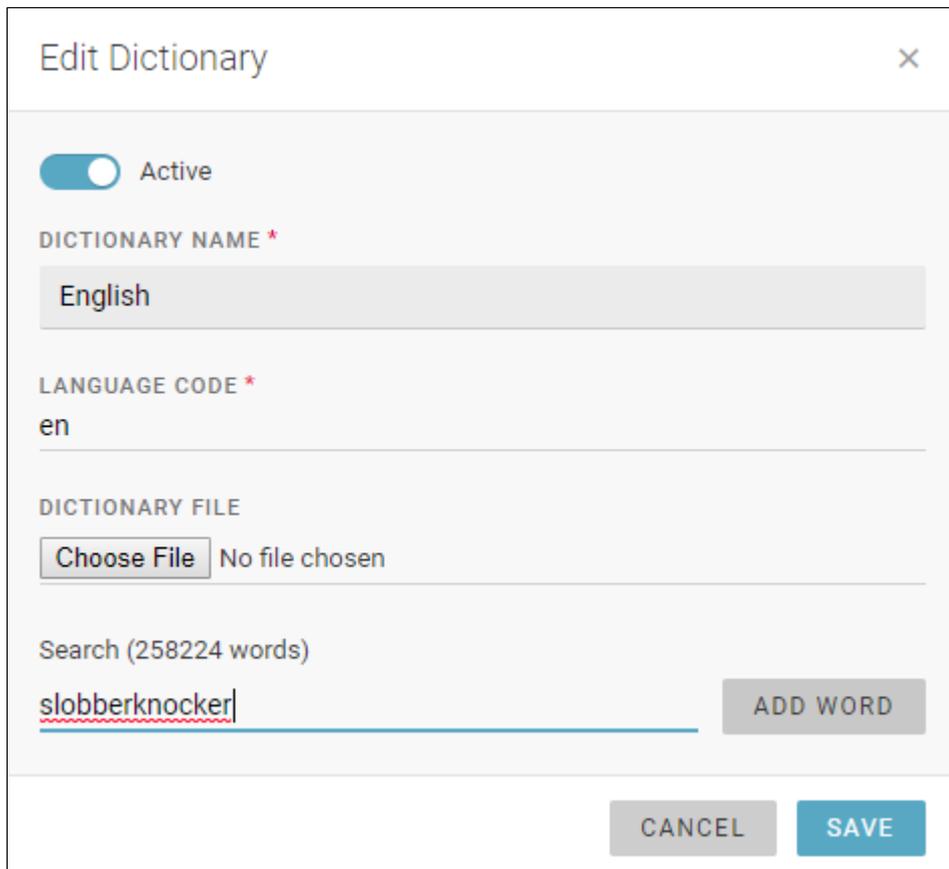


Adding additional entries to a Dictionary

Once a Dictionary is created, you can add additional entries by selecting *Hamburger Menu > Settings > Dictionaries*, then select the edit icon when you mouse over the Dictionary that you would like to add an entry to.



In the Edit Dictionary window, you can search the Dictionary for a word using the search textbox at the bottom of the window.



Active

DICTIONARY NAME *

English

LANGUAGE CODE *

en

DICTIONARY FILE

Choose File No file chosen

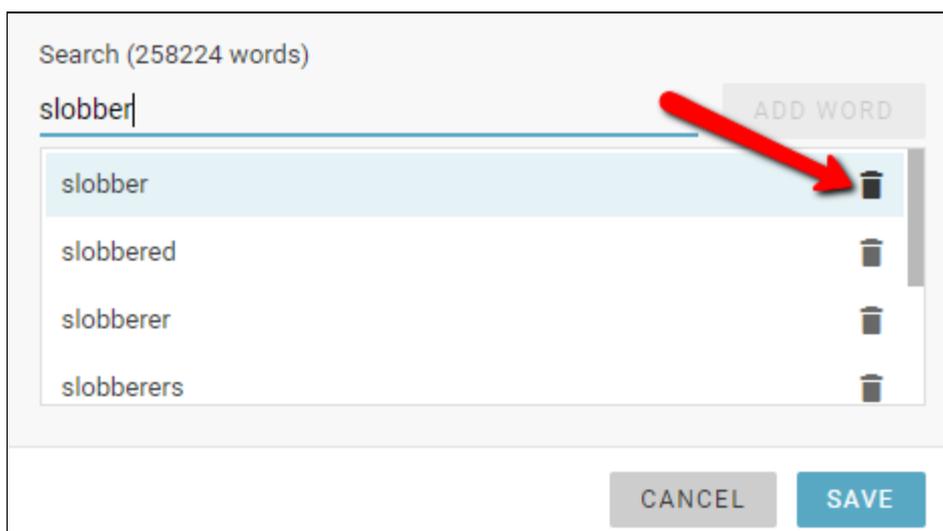
Search (258224 words)

slobberknocker

ADD WORD

CANCEL SAVE

If the word is not in the Dictionary, use the ADD WORD button beside the search textbox. Entries can also be added to the dictionary from the article editing window, in which case the word will be added to the user's personal dictionary.



Search (258224 words)

slobber

ADD WORD

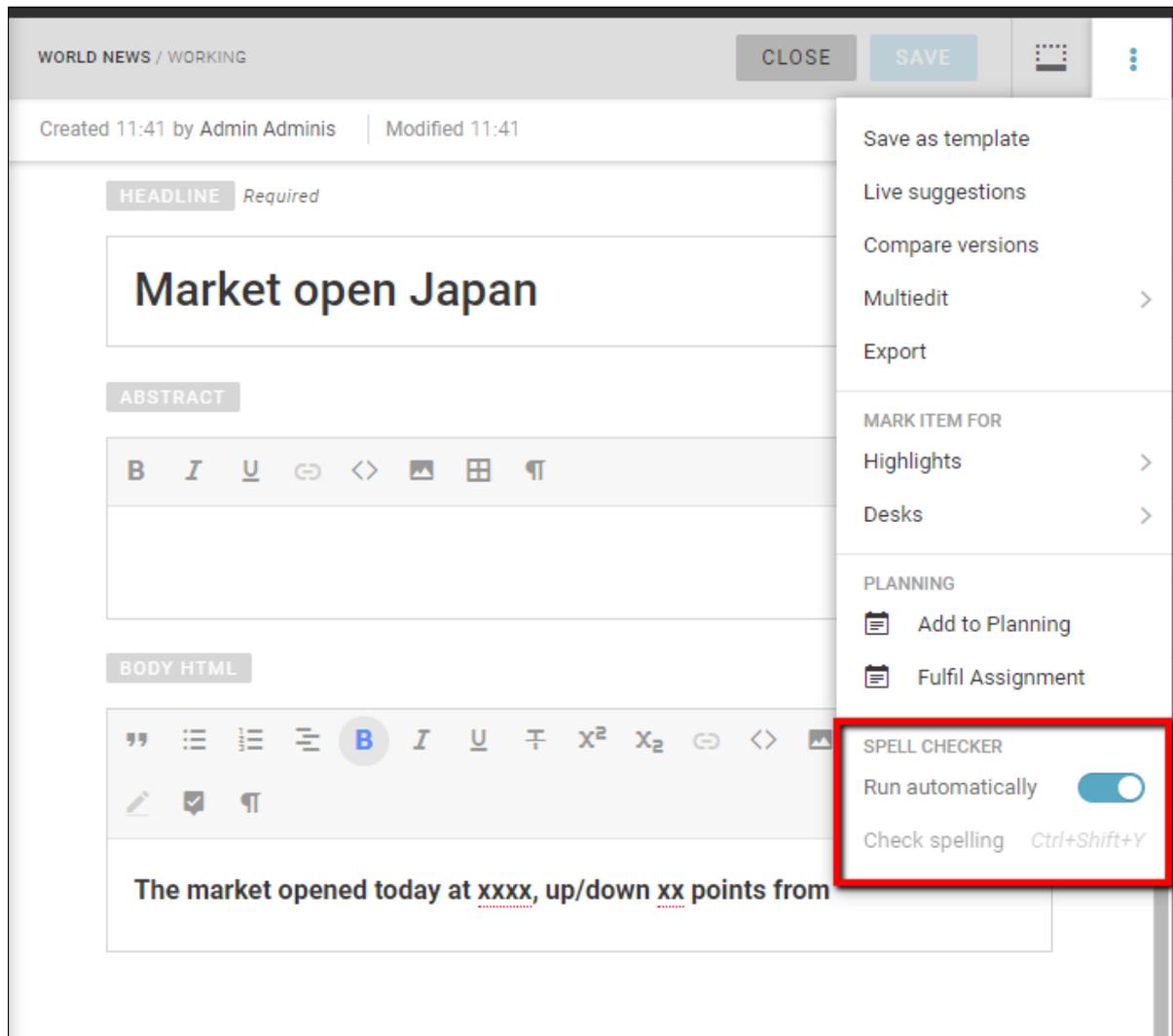
slobber	🗑️
slobbered	🗑️
slobberer	🗑️
slobberers	🗑️

CANCEL SAVE

If you wish to delete an entry from the dictionary, use the trash icon beside the searched entry to remove it.

Using the Spell Check feature

Once your Dictionaries are configured, you can use the spell check by selecting the action menu in the top-right corner of an article that is open for editing. If the *Run Automatically* toggle is on (blue), it will check the words as you are typing, otherwise, you can manually run the Spell Check by using (*ctrl + shift +y*).



The Spell Check will scan the Headline, Body and Abstract fields for spelling errors.

Abbreviations Dictionary

The abbreviations dictionary is a personal dictionary tool that enables automatic text expansion while writing articles. This can be a handy time-saving tool. Some Superdesk users will find that they use it extensively, others less so.

Add New Abbreviations Dictionary
✕

Active

DICTIONARY NAME *

Abbreviations

LANGUAGE CODE *

en

ABBREVIATION

PHRASE

ADD ABBREVIATION

Abbreviation	Phrase	
NJPW	New Japan Pro Wrestling	✕
UN	United Nations	✕
USA	United States of America	✕

CANCEL
SAVE

To set up your abbreviations dictionary:

- Go to *Hamburger Menu > Settings > Dictionaries*.
- Click *the Create icon* in the top-right corner of the dictionary management pane, then select the *Abbreviations Dictionary* option.
- A new window should open titled "Add New Abbreviations Dictionary". Enter a language code. (for example: EN for English). This is so the abbreviation dictionary can be bound to articles of a certain language, similar to the main dictionary.
- Enter the abbreviation to be replaced.
(for example: UN)
- Enter the phrase you want the abbreviation to be replaced with.
(for example: United Nations)
- Click the *ADD ABBREVIATION* button. Your new abbreviation will appear below the button. You can add further abbreviations, or click the *Save* button to close the window.

With the example above, when you are typing in the body text of any article if you type **UN*** and hit space, the automatic editor will replace it with “**United Nations**”. It’s a good idea to create a list of commonly used abbreviations for your newsroom.

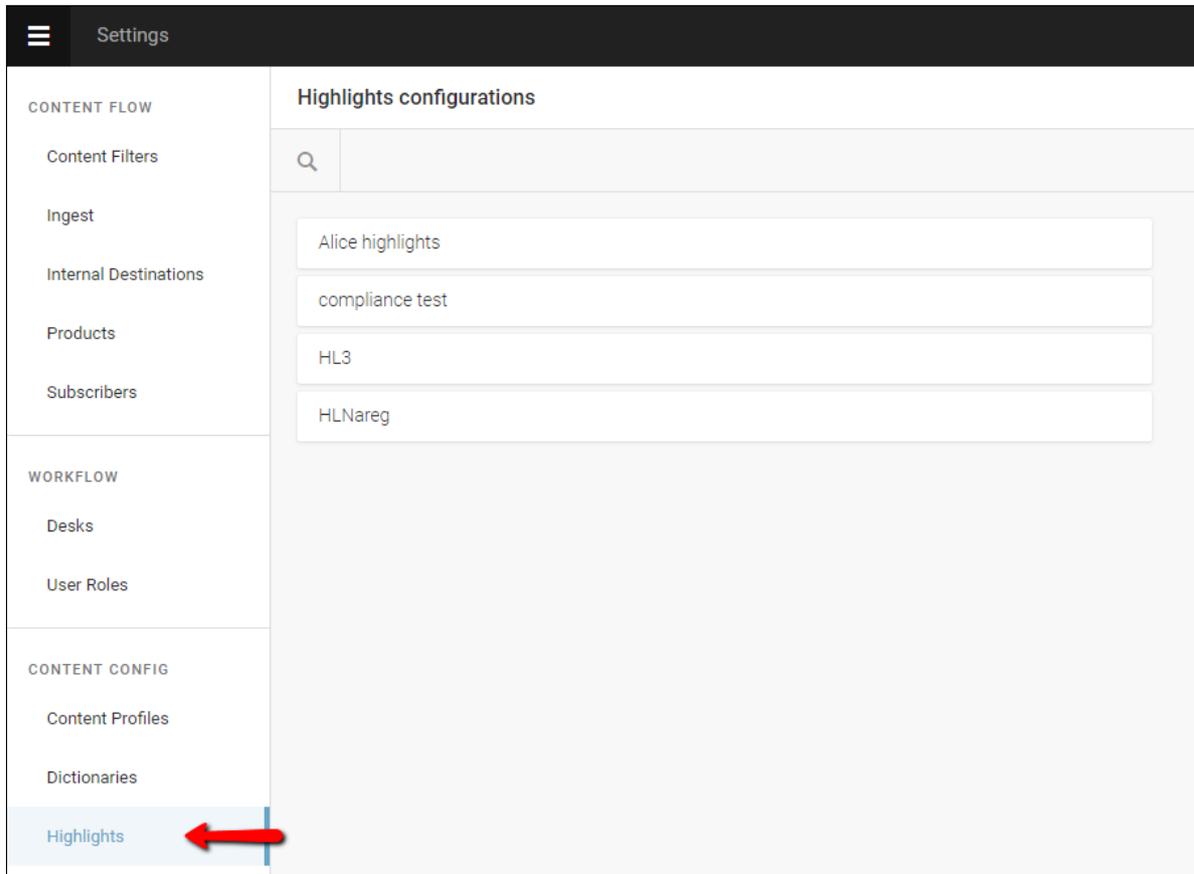


You only need to click the Create icon the first time you’re adding a dictionary. Once the dictionary exists, you can edit your dictionaries from the Dictionary management section by clicking on the pencil-shaped icon beside the dictionary you wish to edit. Editing an abbreviations dictionary in this manner also lets you add more items to it.

Highlights

Highlights section of the Settings menu allows for the creation and configuration of Highlights.

Highlight lists are desk-specific curated lists of news items. They are commonly used for making top-10 lists, section features and other types of user-curated lists. Highlights can be automatically generated against user-specified metadata, or manually curated. Highlight lists can be easily published or simply used for Superdesk internal communication of important news items.



New Highlight lists can only be created from this menu: *Hamburger menu > Settings > Highlights*.



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

Create highlight configuration
×

CONFIGURATION NAME characters 0/40

TEMPLATE

default template ▼

ASSIGNED DESKS

- Adelaide
- Brisbane
- Broadcast
- Canberra
- Darwin
- Features
- Finance
- Hobart
- Jakarta
- London
- Melbourne
- National
- New Zealand
- Perth
- Special
- Sport
- Sydney
- World news

AUTOMATICALLY INSERT ITEMS FROM

Today ▼

CANCEL

SAVE

CONFIGURATION NAME: This field allows you to name the Highlight.

TEMPLATE: This drop-down menu chooses the template that will be applied when a new article is added to this Highlight.

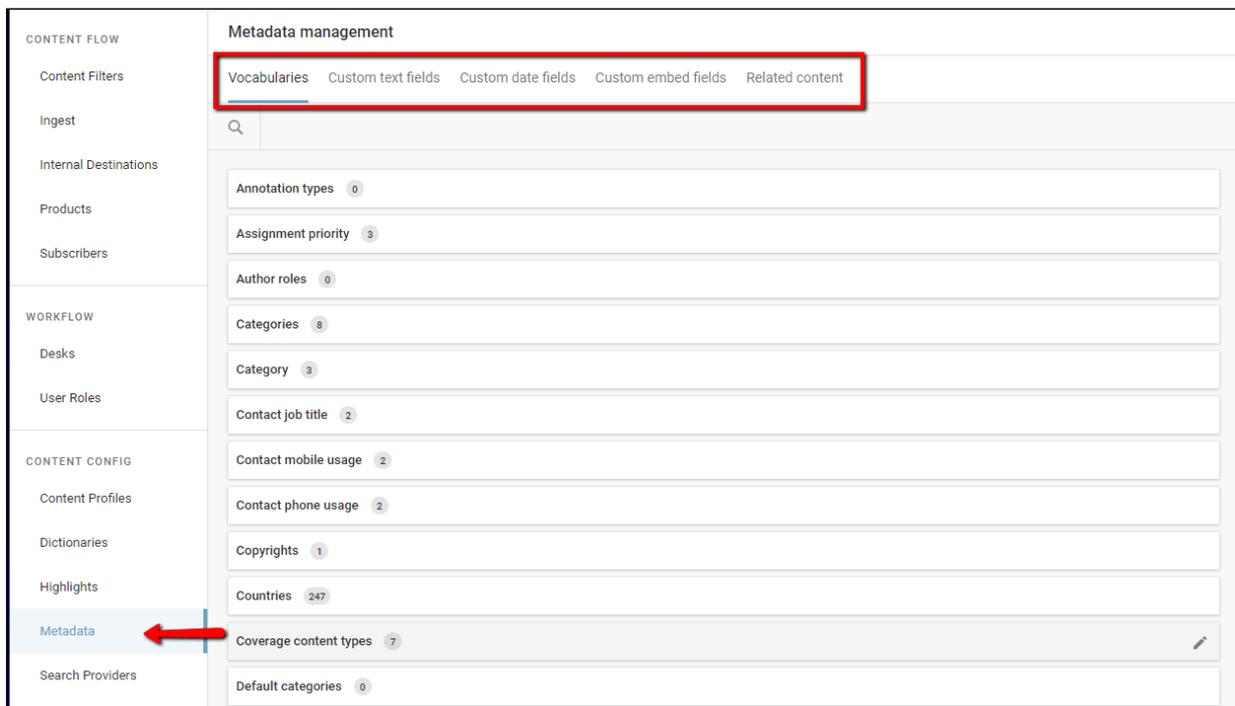
ASSIGNED DESKS: These are the desks which will be able to view the Highlight, additionally, these are the desks that items are automatically added from upon creation of the Highlight.

AUTOMATICALLY INSERT ITEMS: This drop-down menu allows you to choose the timeframe in which items are automatically added to the Highlight upon creation. For example, if you check the Adelaide 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. Otherwise, after a Highlight is created, all curation is done manually. If you want to

create a Highlight that is entirely curated manually, do not select any desk on creation. This Highlight will then be available to *all desks* and those users with appropriate privileges will be able to add content to the Highlight.

Metadata

Within Superdesk, most of the fields are configurable in order to meet the needs of your organization. The metadata section of the Settings menu allows users to define fields not only for news item creation, but also media contacts, events and planning, etc.



To get started defining metadata fields, select the *Hamburger menu* > *Settings* > *Metadata*. At the top of the Metadata Management pane, you may see various tabs: Vocabularies, Custom Text fields, etc. Previously defined entries will show up in the Metadata Management pane. The grey number bubble beside the entry indicates the number of defined options within each entry.



To define a new field, click on the +ADD NEW button in the top-right corner of the Superdesk interface.

Create
✕

ID *

NAME *

DESCRIPTION

CATEGORY

+

Choose existing categories or create new ones by typing. This serves only for easier sorting of vocabularies and is not used elsewhere.

WIDTH OF THE POPUP WINDOW (IN PIXELS)

200 minimum

Defines the width of the pop-up in the article header. A minimal value of 200 is required.

HELPER TEXT

This will appear below the field in the Editor.

SHOW TO USERS AS

Multi selection ▼

Available in user/desk preferences

Items

name	parent	qcode	Active
<div style="display: flex; align-items: center;"> <div style="background-color: #007bff; color: white; padding: 5px 10px; border-radius: 3px; margin-right: 5px;">+</div> ADD ITEM </div>			

CANCEL

SAVE

ID:

NAME: The title of the metadata field as it appears in Superdesk.

DESCRIPTION: This Superdesk-internal description is only visible in this metadata management pane. Use this to describe what the field is used for.

CATEGORY: The Vocabulary list in the Metadata management pane can be broken down into categories. This is important for organizing

WIDTH: Enter the size of the field in pixels.

HELPER TEXT: Explainer text for fields in the Editor. The extra text will only appear if it's a field in the content fields of a content profile.

SHOW TO USERS AS: Choose from single selection, multi-selection or neither. Sometimes

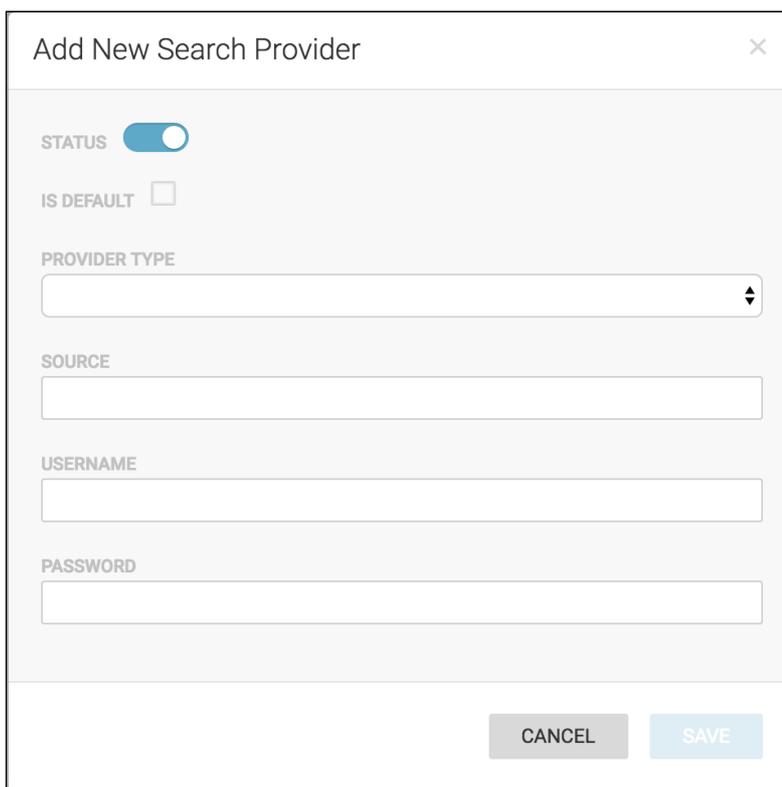
ITEMS: If the field has multiple values, enter the values that users can choose from in this section. Use the +ADD ITEM button to add further values.

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 button in the upper-right corner of the Search providers window to add a new Search Provider.



The dialog box is titled "Add New Search Provider" and includes the following fields and controls:

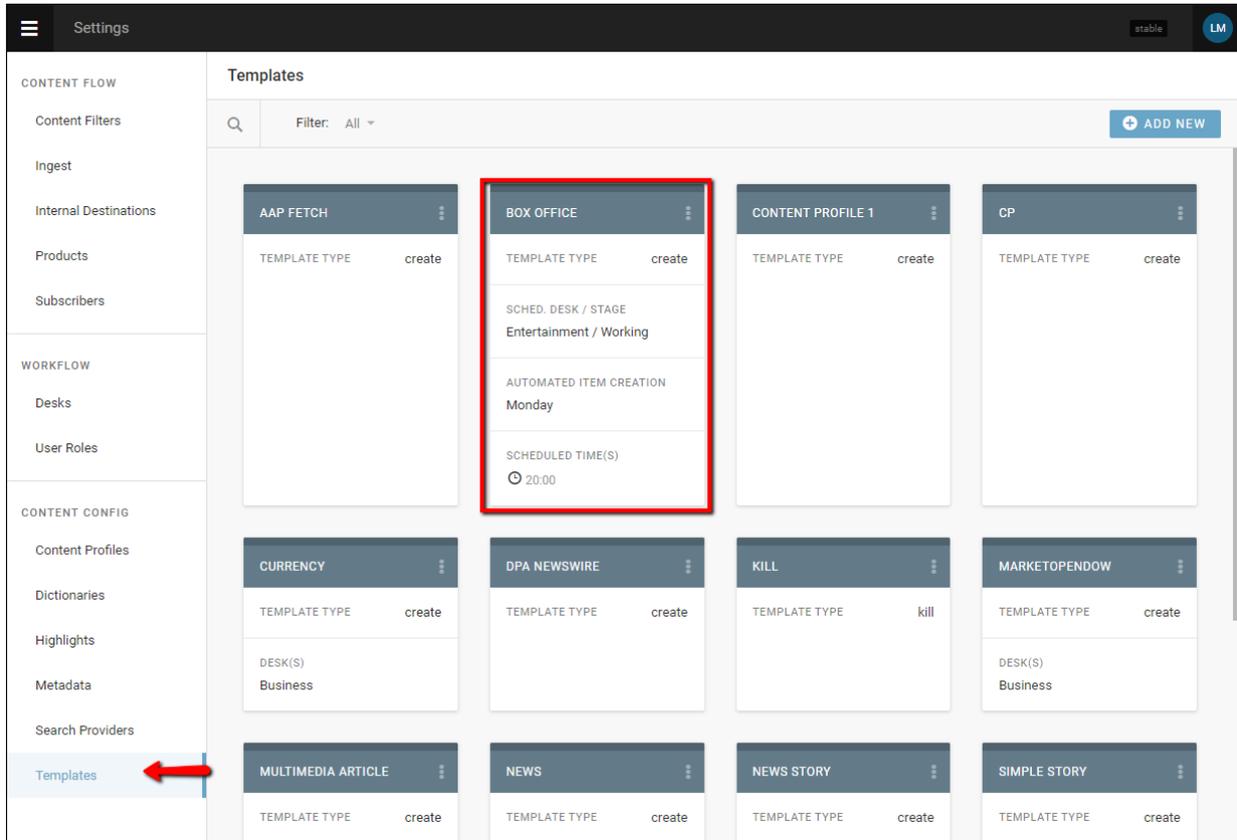
- STATUS:** A toggle switch that is currently turned on.
- IS DEFAULT:** An unchecked checkbox.
- PROVIDER TYPE:** A dropdown menu.
- SOURCE:** A text input field.
- USERNAME:** A text input field.
- PASSWORD:** A text input field.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom right.

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.

Templates

The Templates pane displays all current Templates for your Superdesk instance. Templates are Content Profiles that contain metadata fields that are already filled-in. Templates have several uses within Superdesk. They can save time in routine news item creation, they can be

used to auto-generate articles, they can be the generic kill notification sent to subscribers, or they can be used to auto-format items in a Highlight List.



Clicking on the Create icon in the top-right corner of the Templates pane, will allow you to create a new Template. Once created, each Template will appear in a box in the Templates pane. Each box in the Templates pane displays the template type, the Desk and Stage it's assigned to (if any) and its automated item creation schedule (if any).



This is the Template Action menu.

Existing Templates can be edited by selecting the Action Menu and selecting the *Edit* option. To delete a template, click the Action menu and select the *Remove* option.

Within the Edit Template window, you can enter (or update) any of the Template information.

There are two halves to the Edit Templates window.

On the left side of the Edit Template window, you will need to add a name for the Template.

Setting the **Make Public toggle** to the *on* position (blue) will enable users other than the template creator to use the template. In the *off* position, Template will only be for personal use.

You can choose a **Content Profile** from the drop-down menu at the top of the window.

Depending on which Content Profile you choose, you will see a different set of metadata fields below the *Make Public* toggle.

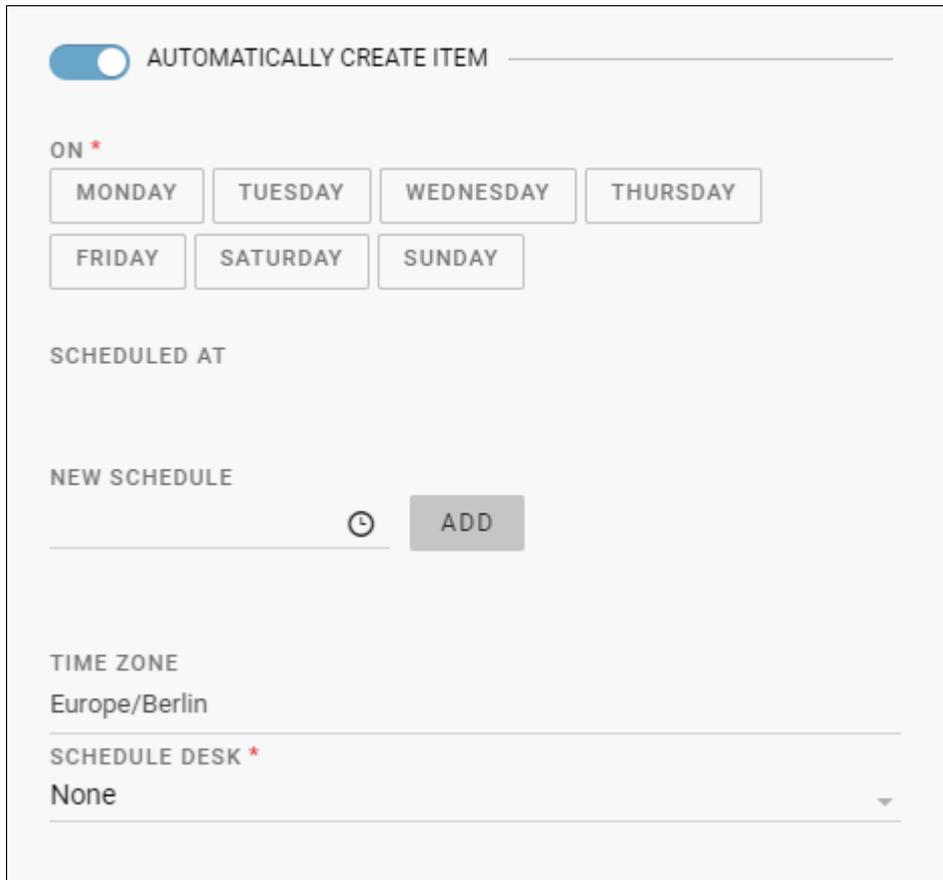
The **Template Type** drop-down menu will let you choose between a Create or Highlight-type template.

The bottom-half of the left-side of the Template creation window will contain various content fields for you to fill in. Any information entered here will appear in every news item created using this Template. The fields that are present will depend on which Content Profile is selected from the drop-down menu above.

The screenshot shows the 'Edit Template' window with two main sections: 'DESKS' and 'METADATA'. The 'DESKS' section is expanded, showing a list of desks: 'Brexit', 'Business', 'DPA', 'Entertainment' (highlighted in blue), and 'News'. Below this, there is a second row of desks: 'News desk', 'Obituaries', 'Sport', 'World news', and 'X-projects'. The 'METADATA' section is also expanded, showing several settings: 'Not For Publication' (toggle off), 'Legal' (toggle off), 'USAGE TERMS' (text input), 'LANGUAGE' (text input), 'TARGET SUBSCRIBERS' (text input), 'TARGET REGIONS' (dropdown menu with 'NOT' selected and an 'ADD' button), and 'TARGET TYPES' (dropdown menu with 'NOT' selected and an 'ADD' button).

On the right side of the Edit Template window, if the Template is set to *public*, you will see a Desks tab. You can select desks that will have access to the Template. When you expand the Desks tab, a complete list of desks will be shown. Desks that are in blue will have access to the Template.

By expanding the metadata tab, you can also edit other Template settings such as Language, Not for publication toggle, target regions, etc.



The screenshot displays a configuration window for scheduling. At the top, there is a toggle switch labeled 'AUTOMATICALLY CREATE ITEM' which is currently turned on (blue). Below this, the 'ON *' section contains seven buttons representing the days of the week: MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, and SUNDAY. The 'SCHEDULED AT' section is currently empty. The 'NEW SCHEDULE' section features a text input field, a clock icon, and an 'ADD' button. The 'TIME ZONE' is set to 'Europe/Berlin'. The 'SCHEDULE DESK *' dropdown menu is set to 'None'.

Below the metadata tab, you will find an 'AUTOMATICALLY CREATE ITEM' toggle. Switching the toggle to the 'on' position (blue) will expand the scheduling options. Automatically created items will appear in the assigned Desk stage at the chosen times. This feature is especially useful for **recurrent weekly news items**.

Click the SAVE button at the bottom of the window to create your Template.

Superdesk API

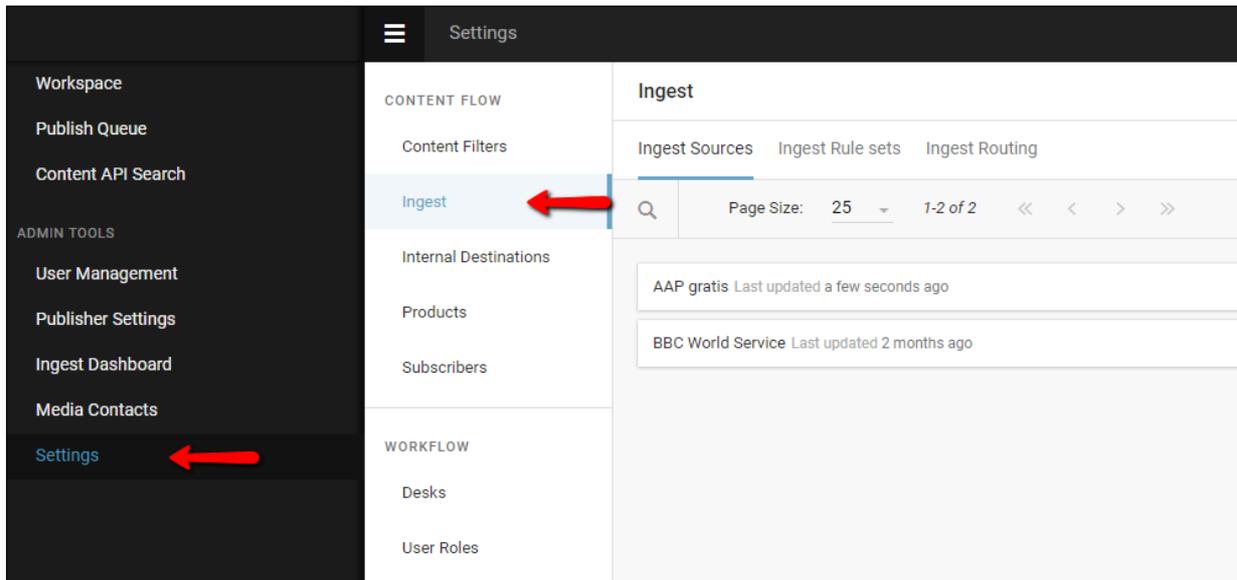
Superdesk features a **Content API**, and as of Superdesk v1.33, Superdesk now features a new API: The **Superdesk Production API**. The Content API allows third-party apps to interact with content that has been published through Superdesk. The Production API allows third-party apps to consume content within Superdesk that has yet to be published. This API is important for facilitating the integration of other apps with Superdesk. Up till now, the Superdesk Content API was the only API aimed for third-party apps, but (by design) it only provides access to published content. While working with news organisations, we identified the need for providing access to production content as well, thus this new API.

The initial Production API Reference can be found here
https://superdesk.readthedocs.io/en/latest/production_api.html

It is also important to learn about the new authentication server in order to grant apps access to the API, you can read about it here
https://superdesk.readthedocs.io/en/latest/auth_server.html

Ingesting News Items and Events

Ingested news items are news items that arrive in Superdesk from outside sources. New Ingest sources can be configured in the Hamburger menu by selecting *Hamburger menu > Settings > 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. This Ingest menu item is also where the Planning Component’s ingested Event metadata is configured. [Read more about the Superdesk Planning Component.](#)



Creating New Ingest Sources



To add a new source to ingest from, click **+ADD NEW** in the upper-right corner of the Ingest sources pane.

Add New Source ✕

General Notification Critical Errors

Active

PROVIDER NAME *

SOURCE NAME *

FEEDING SERVICE *

FEED PARSER

ARTICLE TYPE(S)

UPDATE EVERY
5 min 0 sec

NOTIFY WHEN IDLE FOR MORE THAN
0 hrs 0 min

Content Expiry USING SYSTEM DEFAULT
0 days 0 hr 0 min

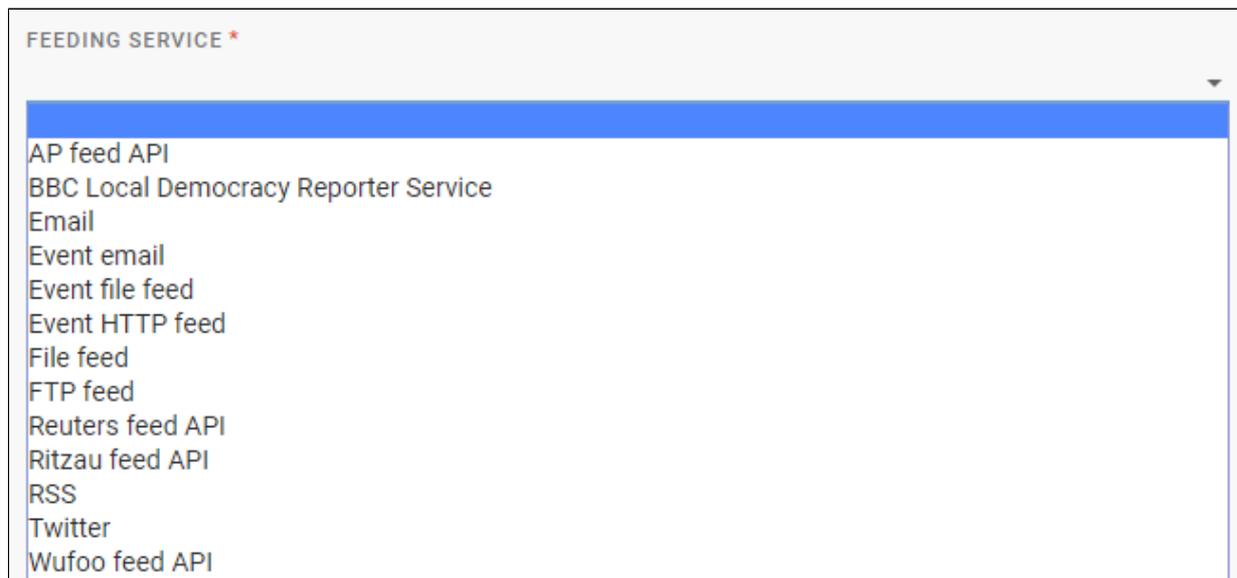
Allow Remove Ingested Items

CANCEL SAVE

Status - The toggle at the top of the Add New Source pane allows you to adjust the status of the ingest source. Status can be set to active or closed. If the status is set to active, Superdesk will ingest from this source. If it is closed, Superdesk will not ingest any further content from this source. Closed sources are saved, and can be reopened at a later date.

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 within 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 metadata.



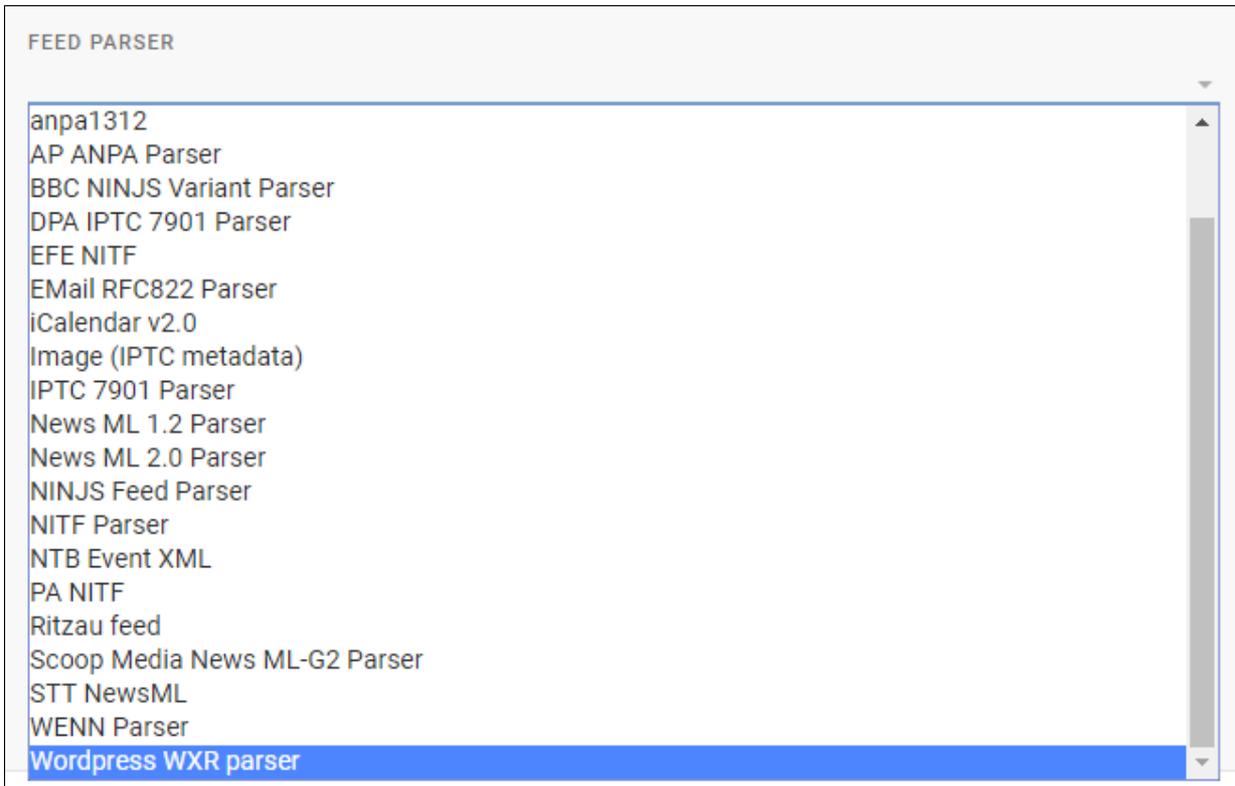
Feeding Service

Select a service type from the drop-down menu. Some examples are below:

- **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 from a particular source. When you select an article type, it will be highlighted in blue. If you want to ingest Events for your Superdesk Planning Component, select the Events icon (far right).

Update Every

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

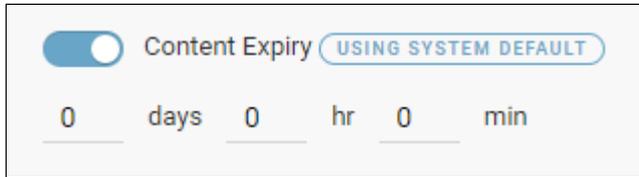


Notify When Idle for More Than

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.

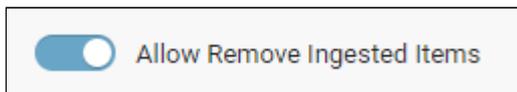
Content Expiry

If an article is older than the expiry limit, it will not be ingested.



This Superdesk feature is great for making sure your newsroom is only publishing the most current and relevant news. If no expiry is selected, Superdesk will use the default desk expiry, if any.

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 Sets

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.

Routing

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.

Creating New Ingest Rule Sets

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

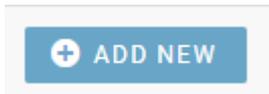


The first field allows you to name your Rule Set. Once you have named your Rule Set, and clicked the *+ADD RULE* button, a new line will appear: the old and new fields are effectively **'find and replace'** functions.

Enter your desired replacement rule and then click the Save button at the bottom of the Add New Rule Set window. 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.

Creating New Ingest Routing

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** button on the top-right corner of the Ingest Routing pane.

Add New Scheme
✕

SCHEME NAME

SCHEME RULES

Rule 1

+ ADD NEW RULE

General Filter Action Schedule

RULE NAME 🗑️ DELETE RULE

SUMMARY

FILTER	ACTION	SCHEDULE
[none]	Fetch: Publish: Exit: Off	Days: - Monday - Tuesday - Wednesday - Thursday - Friday - Saturday - Sunday Start time: 00:00:00 End time: 23:55:00

CANCEL
SAVE

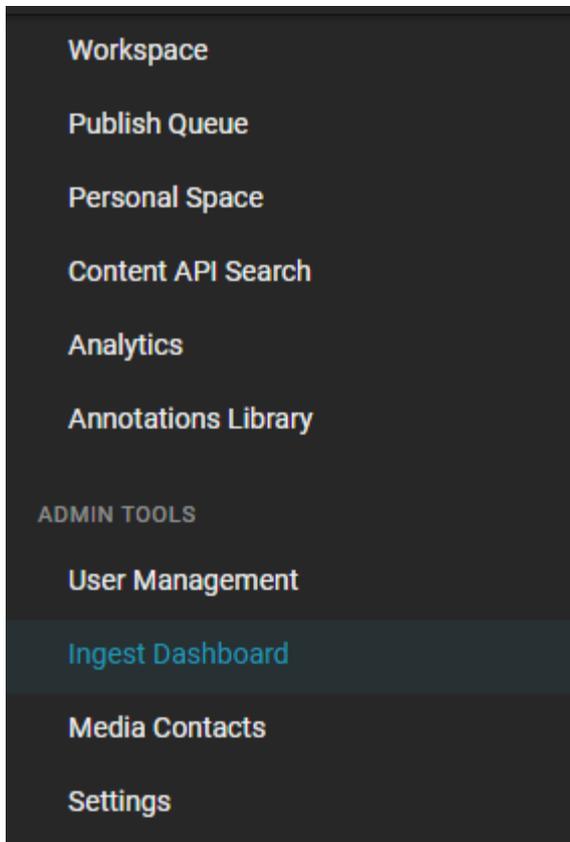
The **RULE NAME** field is where you will name your routing rules. These rules are different from what's found in Rule Sets. The **General** tab also displays the current settings for the Rule. The **Filter** tab allows you to select what Content Filter to apply during ingest, this will let you decide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

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 the criteria is met. The *Preserve Desk* switch,

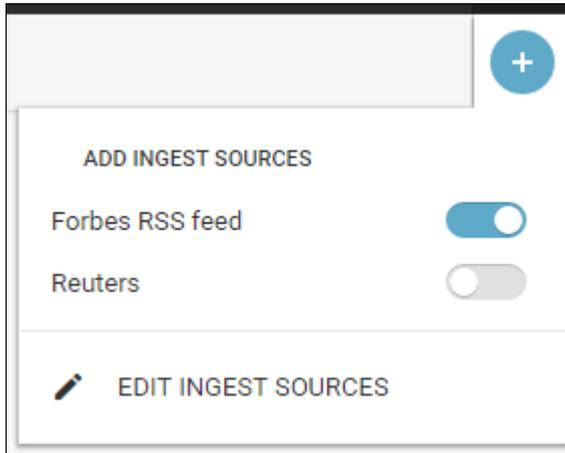
if enabled, will not change the desk of an ingested article if it already has a destination desk set elsewhere. Schedule allows you to decide when this Routing Scheme is applied, an example would be if you have a specific desk for urgent news outside of office hours.

Ingest Dashboard

The Ingest Dashboard can be found in the Admin Tools section of the Hamburger menu.

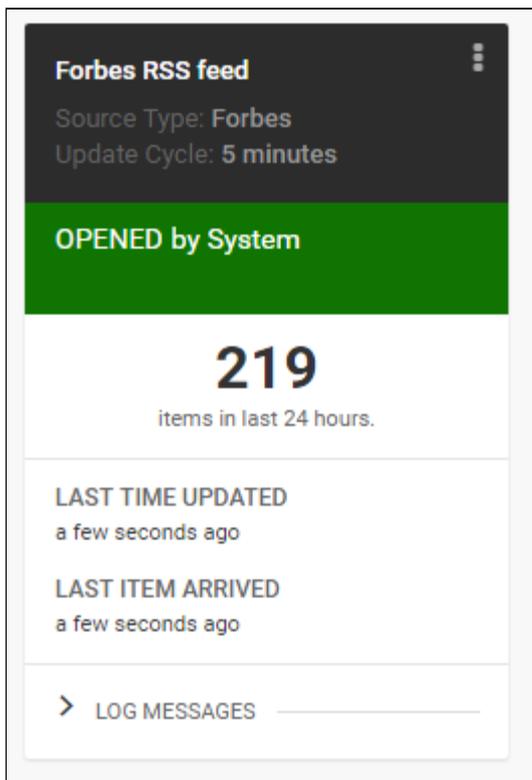


The Ingest Dashboard allows admins to monitor the status of these external news sources that provide news material to Superdesk.



Clicking on the Create icon in the top-right corner of the Ingest Dashboard pane will open a window from which you can manage the items on your Ingest Sources Dashboard.

Toggling the Ingest Sources to the on-position (blue) will display the selected source for monitoring on the Ingest Dashboard. Clicking on the EDIT INGEST SOURCES link at the bottom of the window will take you to the Ingest section of the Hamburger menu.



When an Ingest Source is being monitored on the Ingest Dashboard, it will look like the image above. You can click on the action menu on the top-left of the individual source display to adjust the information being displayed about the Ingest Source.

SHOW	
Status	<input checked="" type="checkbox"/>
Number of items <i>in the last 24 hours.</i>	<input checked="" type="checkbox"/>
Time <i>last update and last item arrived.</i>	<input checked="" type="checkbox"/>
Log Messages	<input checked="" type="checkbox"/>
<input type="radio"/> Show all messages	
<input checked="" type="radio"/> Show error messages	
 EDIT INGEST SOURCE	

Customisable information is as follows:

Status - Shows if the Source is successfully connected to Superdesk.

Number of Items - Show number of articles ingested from this source in the past 24 hours.

Time - How long since the last update and article had been ingested from this source.

Log Messages - Communications and notes from the Source.

Clicking on the EDIT INGEST SOURCE link at the bottom of the action menu will take you to the Ingest section of the Hamburger menu, described in the previous section of this manual.

Superdesk Planning Component

The Superdesk Planning Component is an optional addition to the Superdesk interface that better enables editors and journalists to work together to cover stories as they unfold. The Superdesk Planning Component allows editors to assign news coverage of unfolding Events to Desks, or to specific users. The Superdesk Planning Component can ingest external customer-facing calendars to automatically generate scheduled Events. Assignments work with Superdesk-internal journalist workflows to improve Superdesk-internal communication and task completion.

External calendar and event metadata can be harvested and applied to the content that journalists produce, saving them from entering routine details when they need to focus on delivering the unfolding story to your audience. With the Superdesk Planning Component, Superdesk's internal notifications will keep users on track and informed. The Superdesk Planning Component's alerts can also be integrated with 3rd party programs, such as Slack.



Planning icon

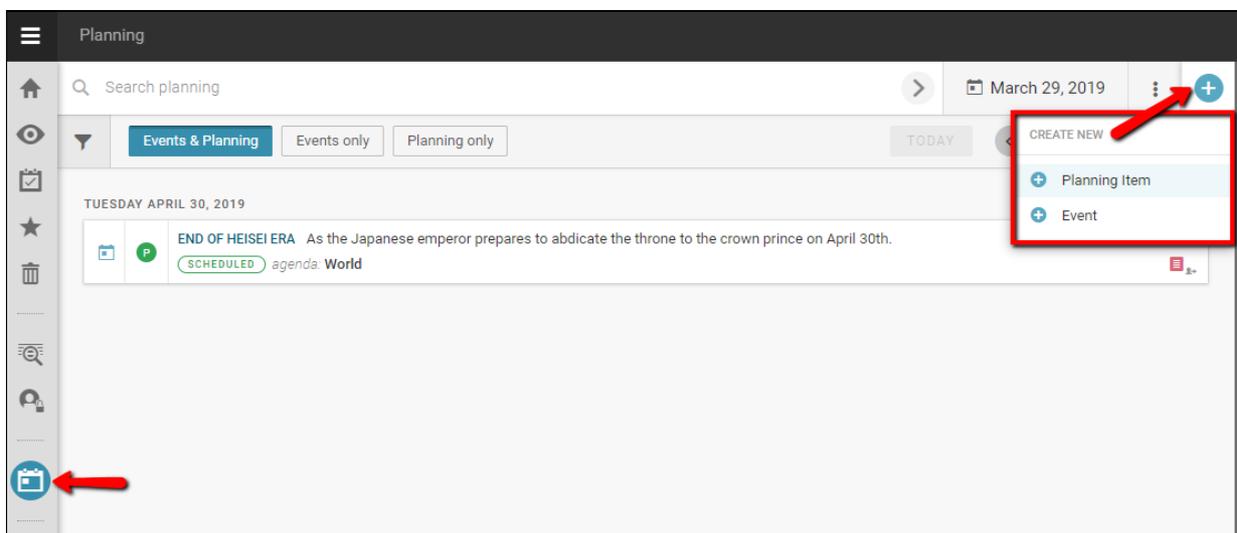


Assignments icon

If your organization is using the Superdesk Planning Component, you may see the Planning icon and the Assignments icon in the Workspace Panel.

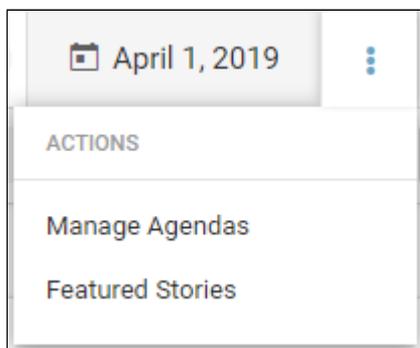
Clicking the Planning icon in the Workspace Panel will take you to the Planning panel.

In the Planning panel, you can create two different types of items: Events and Planning Items. These items are created by clicking the Create icon in the top-right corner of the panel.

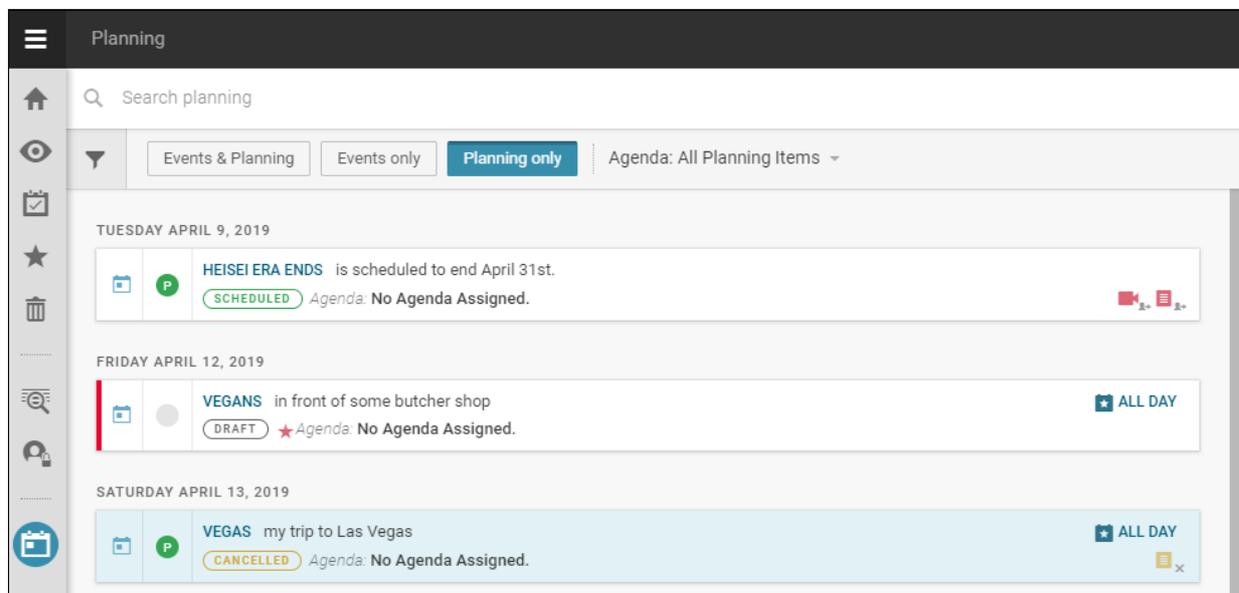


Events - Events have a duration, and can either be recurring, or a one-time occurrence. Events can be ingested from Superdesk-external calendars and automatically generated. Events are not assigned to users, but rather exist within Superdesk to organize coverage. Once an Event is created or ingested, it can be used to generate a Planning Item.

Planning Items - Planning Items are used to assign coverage details to your Superdesk team. Each Planning Item can have several elements of assigned coverage, each of which can be assigned to different users. Planning Items can be exported from the Planning pane to generate articles in the Superdesk Monitoring view. Planning Items can be created independently of Events.



The action menu in the top right corner of the Planning pane allows you to create Agendas and designate Featured Stories.



Agendas are used to group Planning Items together. Agendas are optional and they will appear in the Planning Item description in the list view of the Planning pane, as shown above. Items marked as **Featured Stories** will appear with a red star in the Planning pane list view. Just as in the Superdesk Monitoring view, items that are marked with a red stripe on their left

margin are currently locked. This means they cannot be edited by users other than the user that has it opened, unless the item is unlocked by an admin.



When a Planning Item or Event has been **posted** you will see a green 'p' to the left of the item's slugline. Posted Events and Planning Items are items that have been made public.

Creating New Planning Items

Clicking on the Create icon in the top-right corner of the Planning pane will allow you to create a new Planning Item.

The metadata fields are as follows:

Slugline: This is the main description for the Planning Item. It appears in bold in the list view of the Planning pane.

Headline: This is the suggested headline from the user that created the Planning Item. If the Planning Item is exported as an article, the Headline suggestion from this field in the Planning Component will show up as a note in the body text field of the article.

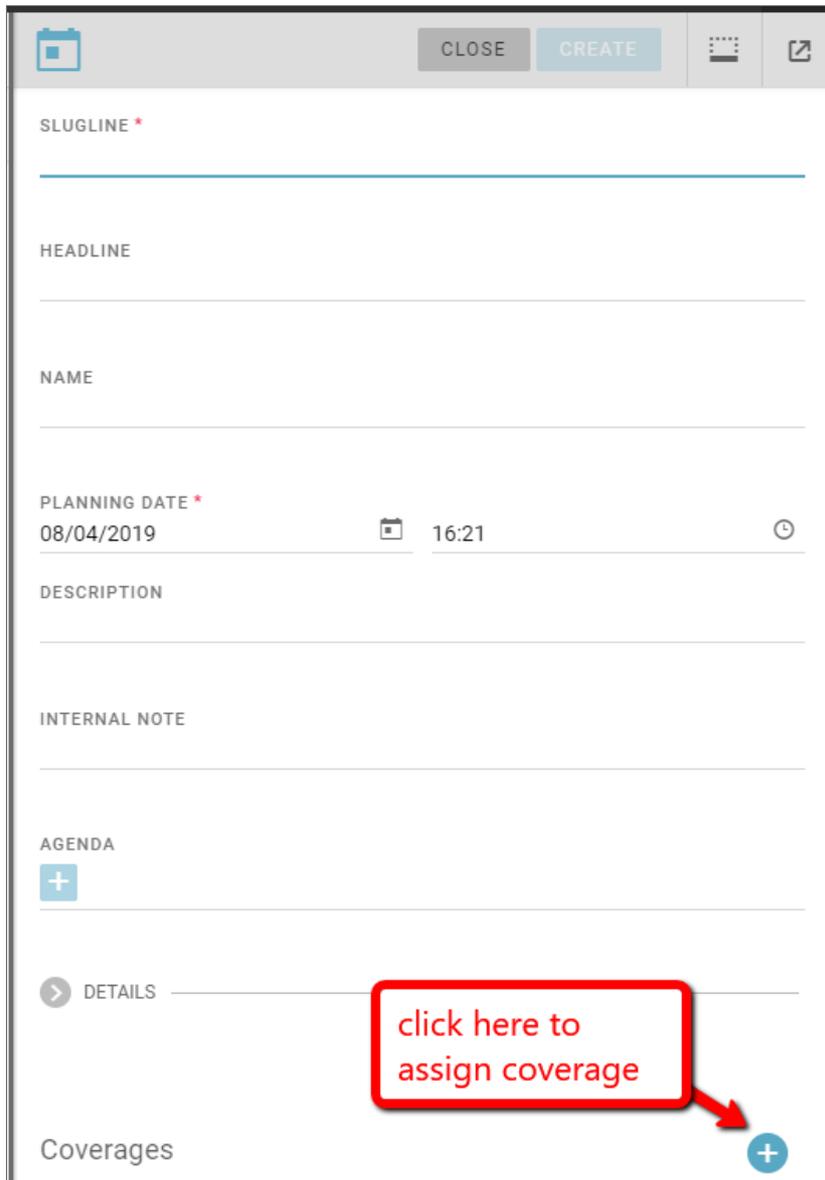
Name: It's a good idea to include the name of the user who created this Planning Item so that your journalists know who to contact should they have further questions.

Planning Date (required): This is the intended creation date for the article. By default, on Planning Item creation, this field will be populated with the current date and time, but this can be manually changed to any date.

Description: When this item is exported as an article, the description provided by the user that created the Planning Item will appear in the body text field. The description will also be displayed in the Planning list view, beside the designated slugline.

Internal Note: Used for Planning Component internal notes.

Agenda: Agendas are a useful way to sort Planning Items. The Agenda will appear in the list view of the Planning pane.



SLUGLINE *

HEADLINE

NAME

PLANNING DATE *
08/04/2019 16:21

DESCRIPTION

INTERNAL NOTE

AGENDA

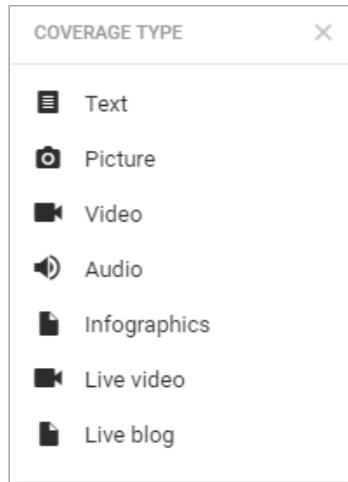
DETAILS

Coverages

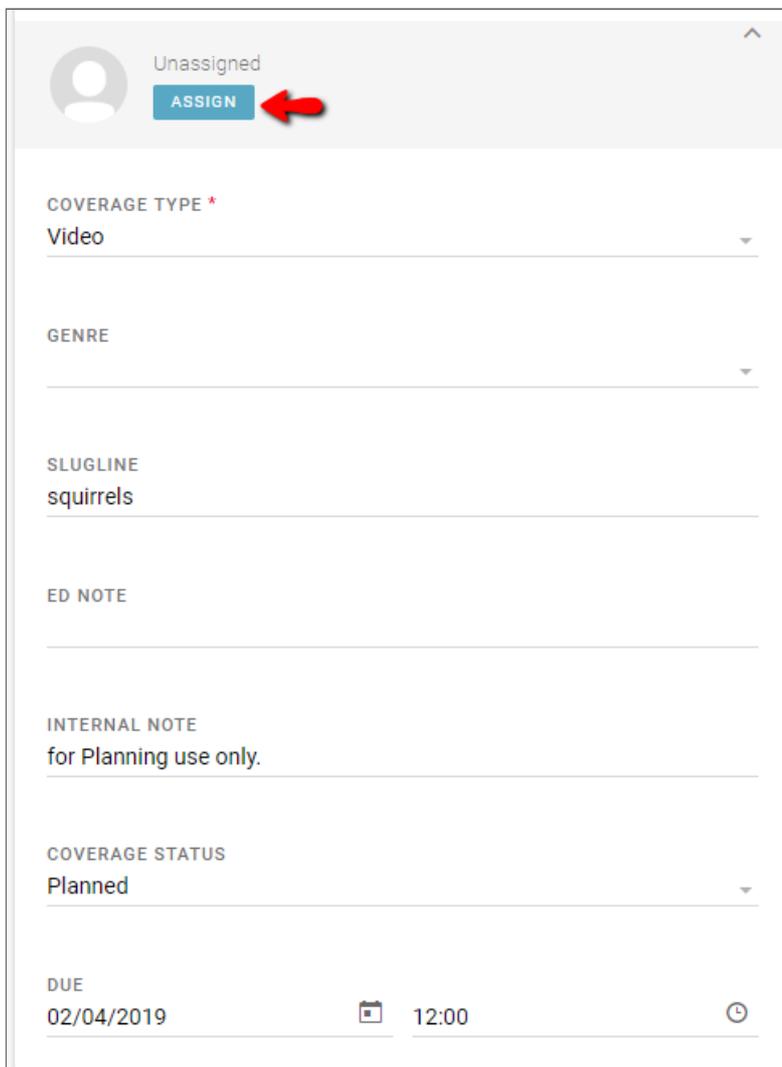
click here to assign coverage

Details: In the Details section, you can add Editorial Notes, Category, Subject, and Urgency. These fields correspond to the metadata fields in new item creation.

Coverages: Once the Planning item is created, additional coverage cannot be added once the Planning Item is posted, so be sure to assign all the pieces you need here before posting. If you need to add additional coverage, you will need to unpost the Planning Item before adding more. Click on the Create icon to add a coverage type. Some examples are shown below:



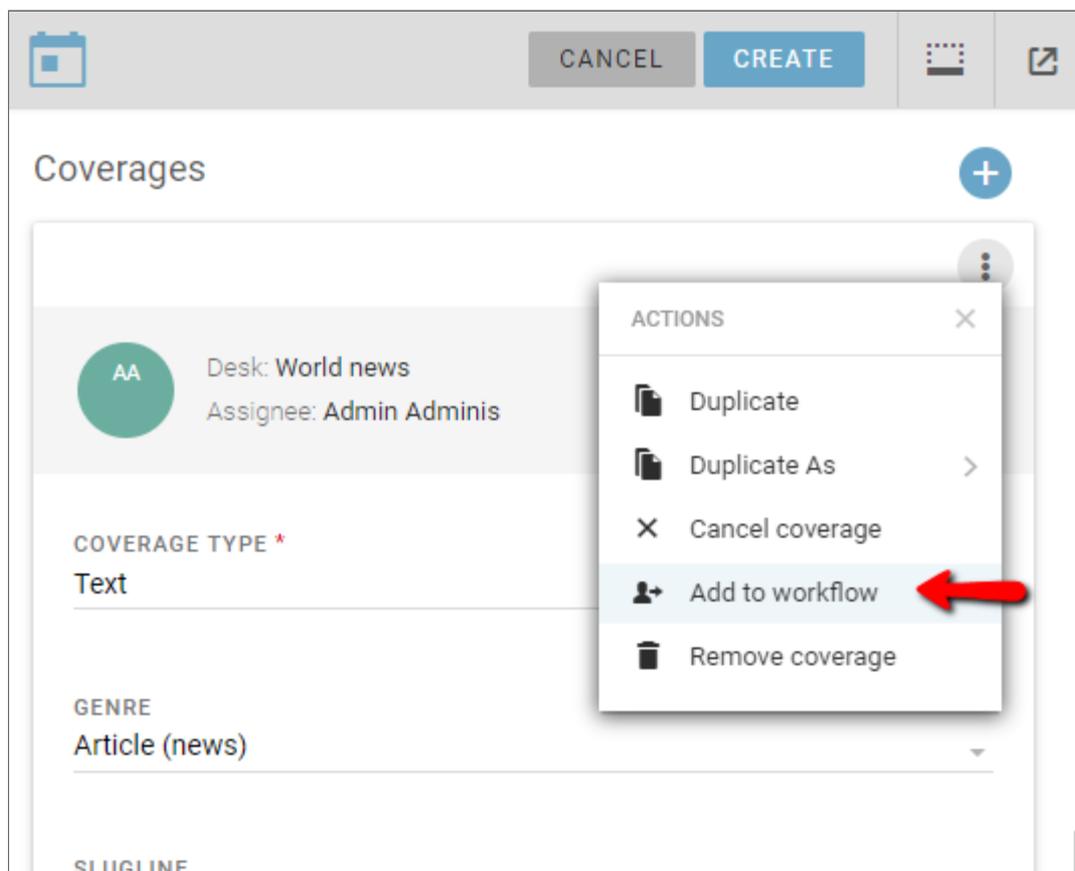
When assigning coverage, be sure to **assign it to a Desk**, and optionally to a specific user within that Desk. If you do not assign a Desk or coverage, and export the Planning Item, it will be created in the most recently assigned Desk.



Click the ASSIGN button on the coverage section to select a Desk and assignee. Be sure to choose the type of coverage you want and the due date. Once you have entered all the details, be sure to hit the CREATE button to make the Planning Item.

Adding Coverage to the Assignments tab

You will need to add any assigned coverage to the workflow in order for it to be visible in the Assignments tab for your selected Desk or users. Find the coverage in the Planning Item editing pane, then use the action menu at the top of each coverage to select the 'Add to Workflow' option.



Once the coverage is added to the workflow, the coverage will appear as an assignment in the Assignments tab for the selected user.

Creating New Events

Like Planning Items, Events are also created in the Planning pane by clicking the Create icon in the top-right corner of the Planning pane.

Events are used to organize Planning Items. Once created, Events can be used to generate associated Planning Items. **Events can be created manually, or they can be ingested automatically from a Superdesk-external source.**

Automatically ingesting external Events

To configure an **automatic Event ingest feed**, click *Hamburger menu* > *Settings* > *Ingest* and then click the ADD NEW button in the top-right corner of the pane. [Read more about creating an Event ingest feed here.](#)

Manually creating Events

To **manually create an Event**, click the Create icon in the top-right corner of the Planning Pane.

In the Event creation pane, fill in as much information as possible:

The screenshot shows the 'Event creation pane' with the following fields and controls:

- REPEATS:** A toggle switch, currently turned off.
- EVENT STARTS *:** A date field containing '05/04/2019' and a time field containing 'Time'. Both have calendar and clock icons.
- EVENT ENDS *:** A date field containing '05/04/2019' and a time field containing 'Time'. Both have calendar and clock icons.
- ALL DAY:** A toggle switch, currently turned off.
- TIMEZONE *:** A dropdown menu with a plus icon and the selected value 'America/New_York'.
- SLUGLINE:** A text input field.
- EVENT NAME *:** A text input field.
- DESCRIPTION:** A text input field.
- OCCURRENCE STATUS:** A dropdown menu with the selected value 'Planned, occurs certainly'.

The top bar of the pane contains a star icon, a 'CANCEL' button, a 'CREATE' button, a list icon, and a share icon.

Repeat toggle: If the repeat toggle is active (blue), you can choose how often the Event occurs. Choose from options such as daily, every x days, weekly, every x weeks, monthly, yearly etc.

Event start / Event end: These fields are required. Specify a start date. If you activate the *All Day* toggle (blue) you will not need to specify a start time or end time. The Event will run from midnight to midnight.

Timezone: If the Event is occurring in Japan, for example, you should specify Asia/Tokyo as the time zone.

Slugline: This is the main description for the Event. It will appear in bold in the Planning list view. Sluglines can be searched using the Planning Advanced Search icon at the top-left of the

Event name: The Event Name will appear beside the Event Slugline in the Planning list view.

Description: Use this field to give further details about the Planning Item.

Occurrence Status (configurable): Choose options from a drop-down menu on how likely the Event is to occur.

Calendars:

Location: Define the Event location by typing in the textbox. Use the OPENSTREETMAP button to search suggested options based on the information you entered, or use the ADD NEW LOCATION button to add location details to your list of commonly used locations. The fields in the ADD NEW LOCATION pop-up shown below:

ADD NEW EVENT LOCATION ✕

NAME *
|

ADDRESS *
|

CITY/TOWN
|

STATE/PROVINCE/REGION OTHER

COUNTRY *
|

Contacts: Contact details for the Event creator should be entered here. If the contact doesn't automatically appear when you type their name, use the ADD NEW CONTACT button to create a new entry. The pop-up window is shown below:

Add Contact

Please specify 'first name, last name' or 'organisation' or both, and at least one of [mobile, phone, email, twitter, facebook, instagram] fields.

PUBLIC

HONORIFIC

e.g. professor, commissioner

FIRST NAME

LAST NAME

ORGANISATION *

POINT OF CONTACT

EMAIL *

CANCEL SAVE

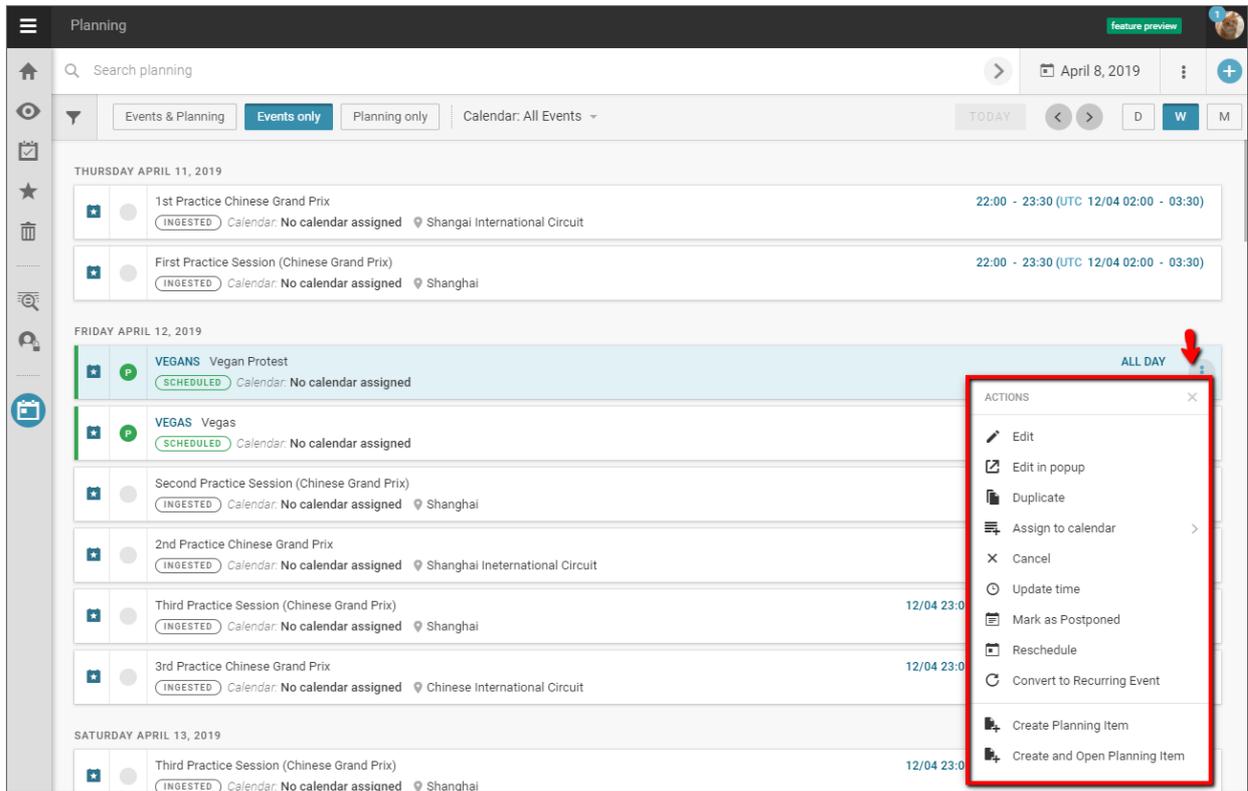
Details: The Details section of the Event creation pane allows you to add additional metadata details to your Event: category, subject, long description, internal note, editorial note.

Attached files: Attach reference files to give journalists and editors further information about the Event.

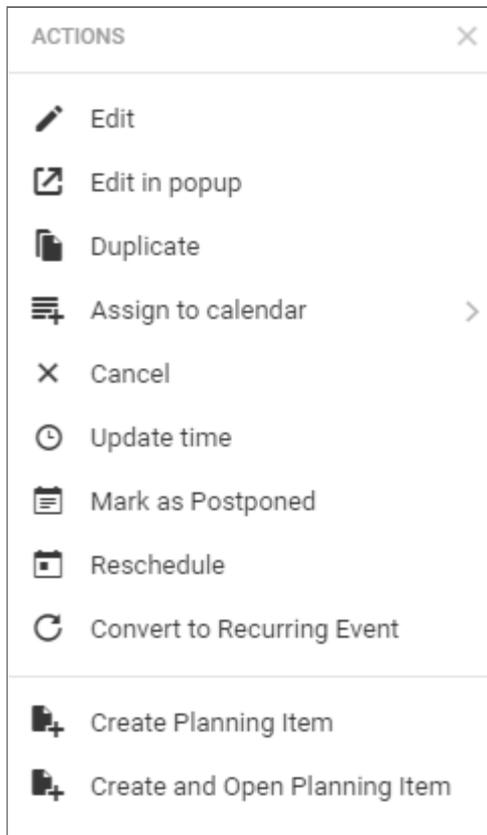
External links: Enter URLs as reference information for journalists and editors.

Events Action menu

Once your Event is created, you can create an associated Planning Item, using the action menu to the right of the Event entry in the Planning pane list view.



The action menu for each created Event is displayed below:

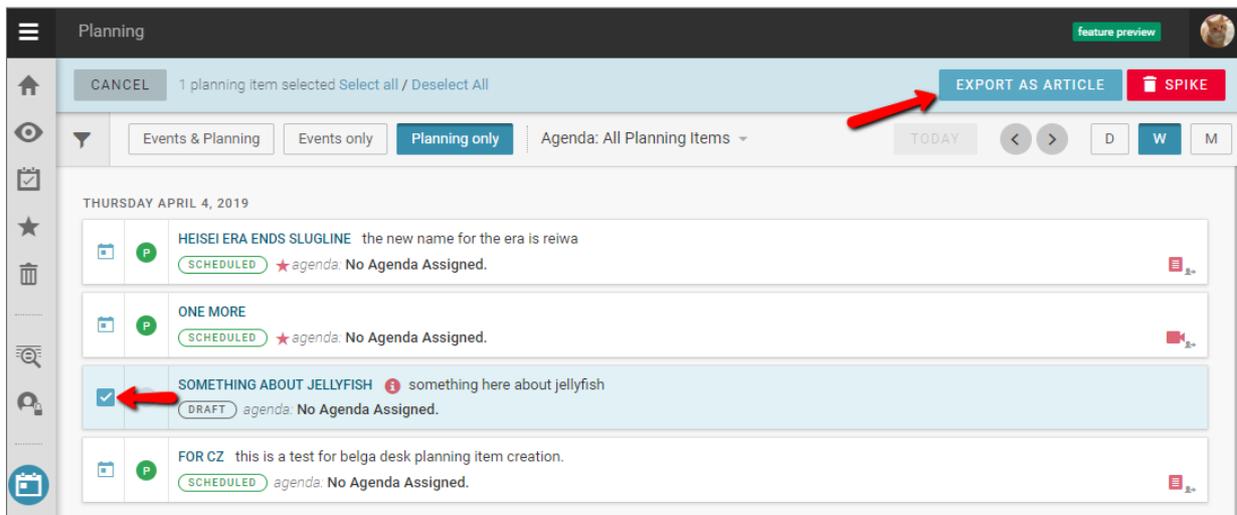


Export a Planning Item

Once you have created a Planning Item, you can export it to a Desk's Monitoring view, in order to have your journalists begin work on the article.

Step 1) In order to export an article from the Planning interface to a Monitoring view, close the Planning item, if it's open.

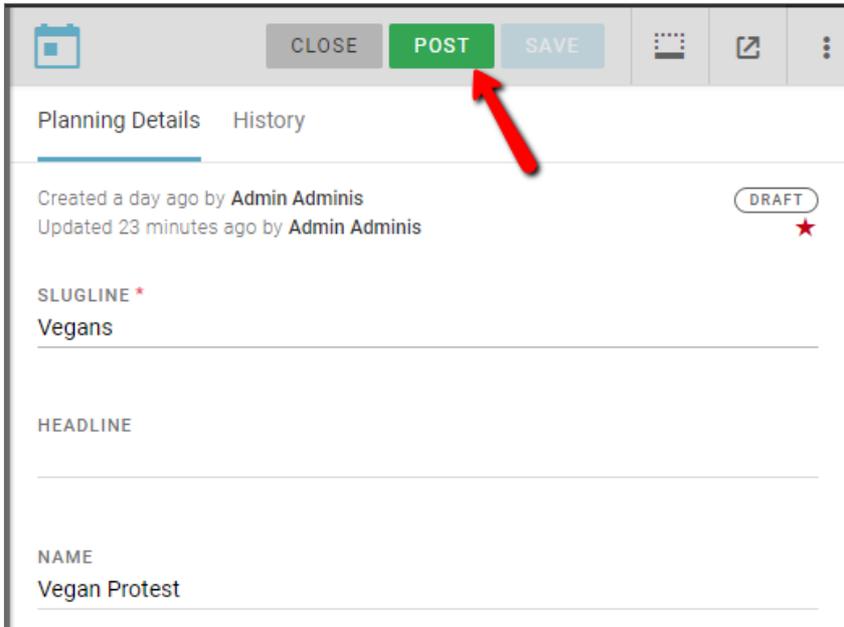
Step 2) Use the checkbox in the left-most column of the Planning view to select the item, as shown below:



Step 3) With the checkbox selected, click the EXPORT AS ARTICLE button to send the Planning Item to the Monitoring view. If you assigned coverage in the Planning Item to a Desk, the item will be created in that Desk. If you didn't assign any coverage, the article will be created in the most recent Desk.

Posting Events and Planning Items

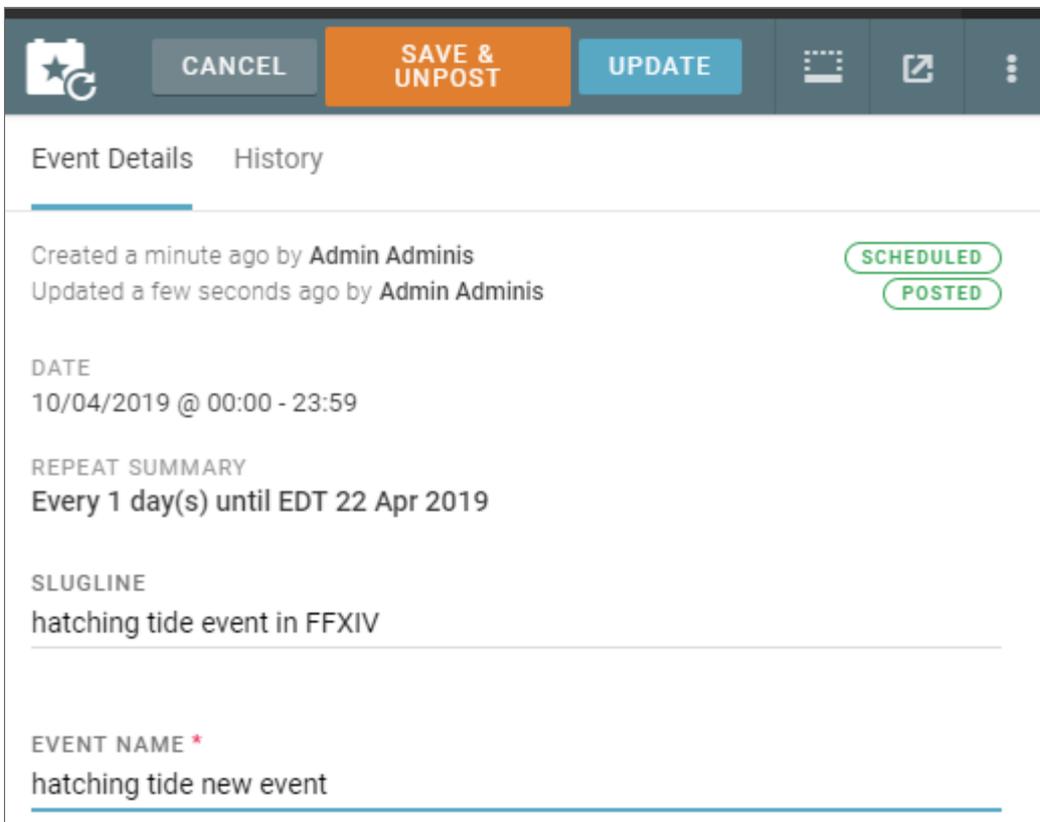
Both Planning Items and Events can be posted. This means, depending on your setup, that your Planning Item or Event will be visible to your subscribers. In order to post an Event or Planning Item, you will need to open the item, and then click the green POST button at the top of the pane.



Once posted, you will see a green 'p' next to the item in the Planning list view.



If you are editing the Event or Planning Item that you have created, you will see options to update or unpost the item.



Assignments and Assigned Coverage

When you are assigned coverage via the Superdesk Planning Module, you can view your assigned tasks, and tasks that have been assigned to your Desk in the Assignments tab.

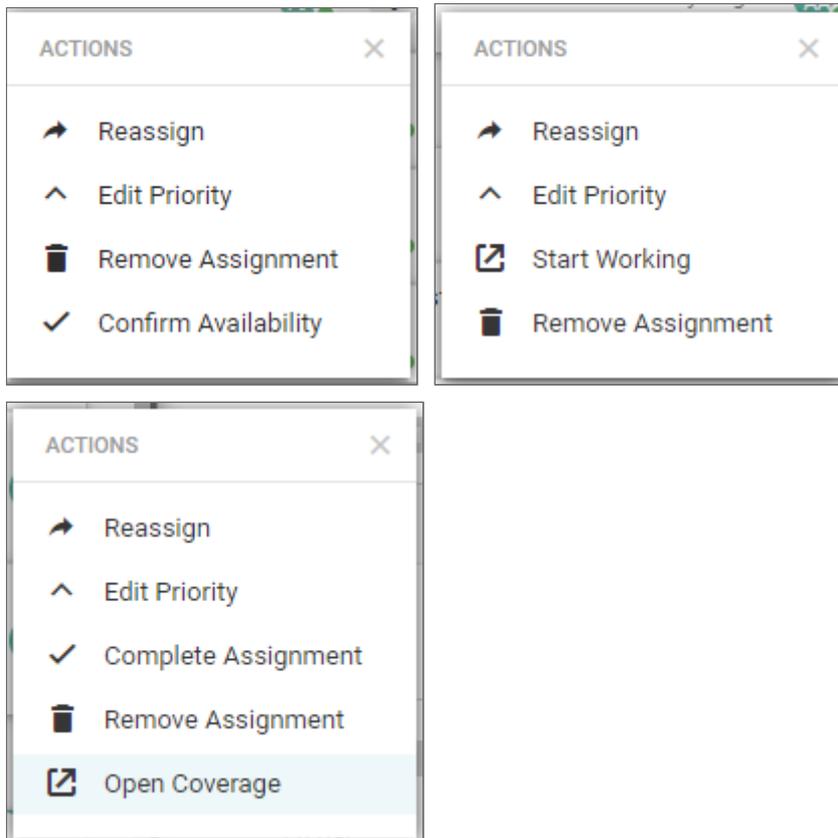


Assignments tab

You will notice two buttons at the top of the Assignments pane: Desk Assignments and My Assignments:

The Desk Assignments will vary depending on which Desk you are viewing. Be sure to check the current Desk, as noted by the Desks menu. In the example above, we are viewing the Desk Assignments in the World News Desk. The coverage that has been assigned to you directly is shown in the My Assignments list view. These are visible only to you.

Clicking on an item in the Assignments list view, will provide several options. The options may vary depending on your permissions and the state of the assignment:



Reassign: If the task was assigned to you by mistake, or if you think the task was assigned to the wrong Desk, use this Reassign option to send the task to the correct location.

Edit Priority: As news stories unfold, sometimes it will become more important or less important. You can change the relative urgency of the Assignment here.

Remove Assignment: Choosing the *Remove Assignment* option will permanently delete the task.

Confirm Availability: Choosing the Confirm Availability will send the Assignment to the *Completed* section of the Assignments pane.

Start Working: If you select the *Start Working* option, you will be required to select a template from the pop-up window, after which the item will be opened in the Editor pane, and the assignment status will be changed to *In Progress*.

Superdesk - Glossary and Terminology Guide

Action menu - Designated by a line of three small dots, an action menu provides additional options for actions such as editing, deleting or fetching to a specific desk. Action menus appear throughout Superdesk. Clicking on an action menu will enable a pop-up menu with further options.



Activity Stream - A Dashboard widget which tracks tasks and item progress across all Desks. It can be customised for the number of items displayed.

Advanced Search icon - The Advanced Search appears on the Search tab. Clicking on the Advanced Search icon allows you to define additional parameters for your search. The Advanced Search icon is shaped like a golf tee.



Agenda - Agendas are part of the Superdesk Planning Module. They are used to organize Events into related groups. New Agendas can be created using the action menu in the top-right corner of the Planning pane.

Analytics - An analytics module for Superdesk can be installed to measure publishing, desk activity and user activity. You can read more about that plug-in here:

<https://github.com/superdesk/superdesk-analytics#archive-reports>

Article / News Item / Content Item - These are generic terms for any content in Superdesk including text articles, photos, videos, packages, used throughout this manual.

Byline - A metadata field on an article which usually contains the author's name and the date of creation.

Create icon - The Create icon is located in the top-right corner of the Superdesk interface. When on the Dashboard, it allows you to add widgets. From other Workspace Panel tabs, it allows you to create new items or import new items into Superdesk. Overall, the uses of the Create icon are context driven. You will see the uses of the Create icon vary in the settings menu and in the article editing window.



Custom Workspace - Your Custom Workspace is a private desk configuration that you can create in the Desks menu. Custom Workspaces are a great way to create custom Monitoring and a private Dashboard to suit your needs. Items created in your Custom Workspace will show up in the Default Desk of the current user.

Content Profile - You can set up content profiles in the settings section of the Settings menu. Content Profiles define the metadata fields for new item creation within Superdesk.

Content Filter - Content Filters allow you to create a series of criteria through which Superdesk can narrow down the news items and create news item groupings. Content Filters allow you to build various Products for distribution. You can use any number of Filter Conditions, or Content Filters to automatically select the content for the Product. Content Filters are optional. If you choose not to use any Content Filters, every news item that you publish will be part of your Product.

Dashboard - You can access your desk Dashboard by clicking on the house-shaped icon in the Superdesk Workspace Panel. Your Dashboard provides an overview of content and information with customisable Widgets. Dashboard widgets on desks are set up by the desk administrators. Custom Workspaces can be customised with their own widgets by each user for their individual needs.



Desks - Desks are the basic organisational unit within Superdesk. They are similar to topic desks, or news beats that would be found in a traditional newsroom; for example a sports desk, foreign news desk, entertainment desk, etc. The Desks menu is the blue drop-down menu found to the right of the Hamburger Menu icon. It always displays the name of the Desk you are currently working on. Users can only view the desks to which they are assigned. A single user can work on multiple desks.

Destinations - Destinations are the *where* in the publishing process. You can have multiple destinations for a single Subscriber.

Editor Sidebar - The toolbar that appears on the right-hand side of the Superdesk interface when an article editing window is open. Available tools may include Send To, Find and Replace, Packaging, Versioning, Comments, Suggestions and others. The availability of the icons in the Editor Sidebar is determined by the Content Profile you are using.

Embargo - When an article is flagged with an embargo, it lets Superdesk users know that the article should not be published until a certain date and time. Note: The embargo does not actually prevent the article from being published before the flagged date.

Events - Events are part of the Superdesk Planning Module interface. Events can either be created manually, or automatically ingested from a Superdesk-external Calendar.

Fetch - The process of moving an article to a Desk. Usually specifically refers to moving an article from *Ingest* to a Desk.

Flag: Flags are coloured article status markers that appear beneath the headline denoting the status of an article. Examples include; Legal, Not for Publication, Ingest, Published, Killed, Takes, etc.

Global Read - A toggle setting on a Desk stage or a Saved Search which allows it to be added to any Monitoring widget or Monitoring tab.

Global Search - A Search that encompasses all the articles in Superdesk, other than articles created in Personal Spaces.

Grid / list icon - The grid icon is found on the Search tab and in the Legal archive. Clicking on it allows you to change between a list view and thumbnail view. Thumbnail views are great for viewing images. Click on the list icon to switch back to the list view.



GUID - This is a field in the Info section of the Editor Sidebar. It provides a unique global identifier for your item. It cannot be changed or edited. GUID identifiers can be used to test Content Filters.

Hamburger Menu - Located in the top left corner of the Superdesk interface, the Hamburger Menu is a black and white. The items available in this menu will vary depending on your user role and permissions. This menu allows access to more advanced features such as Desk configuration, User Management, Ingest configuration and Superdesk-internal Analytics.



Headline - The main idea of a story, presented in a few words. It's usually presented in a larger font above the body of the news item.

Highlights - Desk-specific curated lists of important articles. Commonly used for making top 10 lists, section features and other types of user-curated lists. Highlights can be automatically generated against user-specified metadata, or manually curated. Highlight lists can be easily published or simply used for Superdesk-internal communication of important news items.

Ingest - As a verb, "Ingest" refers to the way in which articles from other news sources arrive or are imported into Superdesk. As a noun, the ingest refers to the list of articles that have arrived in Superdesk from external sources.

Ingest feed - A search containing only newly ingested articles and news items.

Ingest Source / Source - An Ingest Source is a feed from which Superdesk will bring in externally created news items.

Kill - The rescinding / take-down of a news item that has been published - or distributed to customers for publication - usually due to legally problematic material. Killing a news item notifies all people who received it that it must not be used (and gives the reason why) and must be taken down if it has been published. The kill action removes the article content from everywhere except the Legal Archive (provided your version of Superdesk contains that feature).

Macro - A specific set of rules and transformations that are applied to an article. Macros can be applied while editing an article. Macros are created in the backend.

Metadata - Metadata is information about news items and articles in Superdesk. This information, which is attached to all items, may include fields like:

Slugline - a Superdesk-internal article description which appears adjacent to the headline.

Priority - a news value rating between 1 and 6. A value of 1 means it has the highest value.

Urgency - a rating between 1 and 6 on the relative significance of an article. 1 is the highest.

Genre - a drop-down menu to select an article type, for example: interview, analysis, feature.

Place - a drop-down menu for where the article is being written.

Subject - a drop-down menu for selecting the topic, for example: politics, arts, sports, health.

The more complete your metadata is, the easier it will be to search for and update it.

Monitoring - Monitoring refers to a tab in the Workspace Panel. Monitoring for desks is set up by the desk administrator. The Monitoring tab can be set up to show desk Stages and Saved Searches. The Monitoring tab in the Custom Workspace can be individually adjusted to monitor several desk stages or saved searched in one spot.

Monitoring Widget - A Dashboard widget which can be adjusted to show desk Stages and Saved Searches. It can be used on desks, or custom workspace Dashboards.

Multiedit - A feature in Superdesk which allows you to have more than one article open at the same time, side by side.

Open Items icon - Located in the bottom left corner of the Superdesk interface, clicking on the Open Items icon will bring you to a grid view of all your open items.



Output - Articles from a desk that are ready to be published. Output rules can be applied to these articles.

Package - A number of items (articles and/or images) that Superdesk users can group together. Packages can be published as a single item. Packages have their own metadata outside of the metadata attached to their individual components.

Personal Items - Articles or Items that have been created in your Personal Space. These articles are private until sent to a Desk. Items created in your Personal Space will not show up in Global Searches.

Planning Item - Planning Items are part of the Superdesk Planning Module interface. Planning items are used to assign coverage to specific desks or users. They can be generated from Events, or they can be created manually. Each Planning Item can contain several pieces of coverage, each assigned to a different user. Planning Items can be exported from the Planning pane to generate articles within the assigned Desk.

Personal Space - Each user has a Personal Space in which they can create Personal Items. You can access the Personal Space from either the Hamburger menu, or the Personal Space icon in the Workspace Panel. The Personal Space is available independently from the Custom Workspace.

Products - Products can be thought of as another layer of Content Filters. A typical Product might be the same as the application of Content Filter before an item gets published. However within the Products interface in Superdesk, you can further define the Product by adding territorial restrictions. A Product that has no Content Filters applied will contain every item that is published in your instance of Superdesk.

Publish - The act of sending a completed item to your subscribers. News items can be published across multiple formats.

Publishing queue - A section in the settings menu which contains a list of published items and the publish destination (clients). If an article failed to publish successfully, you will see that recorded in the publishing queue and you have the option to resend the item from the Publishing Queue tab.

Pyramid icon - The pyramid icon is found in the Monitoring view and in the Search tab beside the *Sort* drop-down menu. It allows you to reverse the order in which a list appears based on your *Sort* criteria. The inverted pyramid allows you to switch back to the previous view.



Roles - A role is your designated job within Superdesk. Your role comes with a set of privileges and permissions. Some examples of roles are: journalist, editor, manager, reporter, bureau-chief, copytaker, producer, etc. Permissions for each role are customisable from the Settings menu.

Saved Search - A Saved Search is a set of parameters which have been generated by a user in Superdesk to find articles. Saved Searches can be displayed in Monitoring Widgets and Monitoring tabs on desks if the Global Read toggle is set to the on position.

Subscribers - Subscribers are customers. Each Subscriber can receive a mixture of Products, to any number of Destinations. A Subscriber can also be another distribution system or systems. For a digital publisher, the Subscriber can be a website, mobile app or other asset.

Superdesk Publisher - Superdesk Publisher is a lightweight open source renderer for news articles and other content delivered via an API feed. It was designed to work with Superdesk. Superdesk Publisher serves as a central dashboard to route and manage content flow to all of your media assets. Your overview of content is continuously updated in real time throughout its lifecycle.

Slugline - While articles are in production, it is common practice for journalists to designate them with a short name or “slug” to describe the article story or subject. In the article editing window, users can enter this name in the slugline text box. Note that sluglines are Superdesk-internal and do not appear in the published version of an article. Sluglines can be used for grouping Related Items.

Spike - Spiking removes articles from the desk workflow. Spiked articles aren't deleted, but are moved to the Spiked Items section of that desk. You can't spike items that are locked or currently open. To view a Desk's spike, click on the trash icon in the Workspace Panel.

Stage - In Superdesk, content within desks are divided into Stages. Usually there's an input area to which articles are fetched, an area for newly created items, an area for editing, an area for published items, etc. These areas are called Stages. Stage names (i.e. input, output, etc.) are defined by the desk administrator and can be unique to each Desk.

Take - A take is a piece of a story, often written as the story unfolds. Selecting the New Take option creates a news item with the same headline, slugline and metadata but the body text is blank. Takes are numbered using the sequential takekey numbers as new takes are created. A take can be created from any text item, even after it has been published. Takes cannot be created for packages or media other than plain text.

Takekey - For articles that are broken up into more than one piece, the takekey number indicates the order in which they should be delivered. A higher number indicates a later part of the article. The takekey text box is also modified for articles that have been updated. For articles that aren't broken up into takes, the takekey number is blank.

Username - Superdesk users log in using their username. Usernames are chosen at the time of profile creation. Comments directed towards a particular user can use *@username* to tag the user in a comment. Once the user profile is created, the username cannot be changed.

User icon - The user icon is a round icon found in the top-right corner of the Superdesk interface. Clicking a user icon enables the editing of your user profile and the option to log out of Superdesk. You can customise the image in your user icon by editing it in your profile. By default, your user icon is a blue circle containing your initials. If you have new system notifications, you will see a light blue numbered bubble attached to your user icon.



Widget - Widgets are tools that you can place on your Superdesk Dashboard. They allow for a quick overview of information and content. There are four different types of widgets available: Monitoring, Ingest, World Clock and Activity Stream. You can customise your personal Dashboard in your Custom Workspace. Shared desk Dashboards are usually configured with Widgets by the admin and each user on the Desk will see the same configuration of Widgets..

Workspace Panel - The Workspace Panel is the column of icons along the left side of the Superdesk interface. From top to bottom: Dashboard, Monitoring, Highlights, Tasks, Spike, Personal Space, Search, etc..