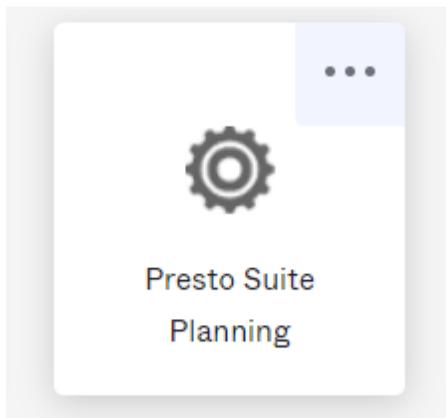


# Orienting yourself in Presto Planning Suite

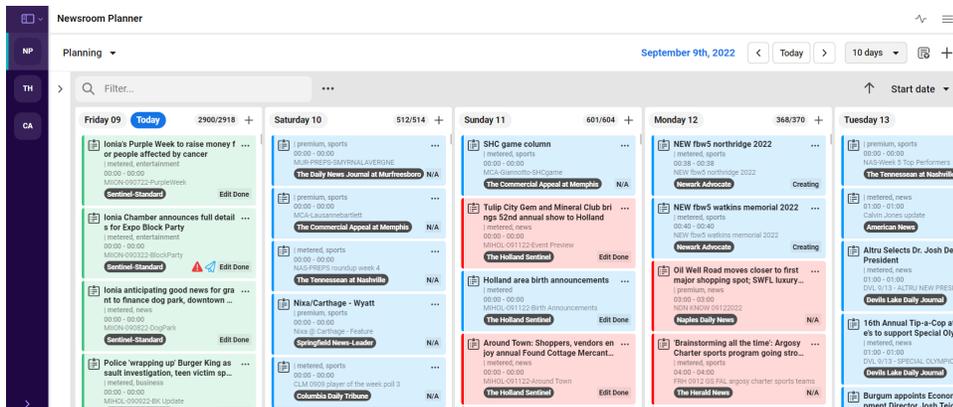
Presto Planning Suite is Gannett's tool for organizing content. Integrated with Presto, the platform is designed to improve communication between the newsroom, planning desks, DOT and Design Center to make sure all our journalism reaches the right audience, in the right place, at the right time.

Here's a quick run through of how it works

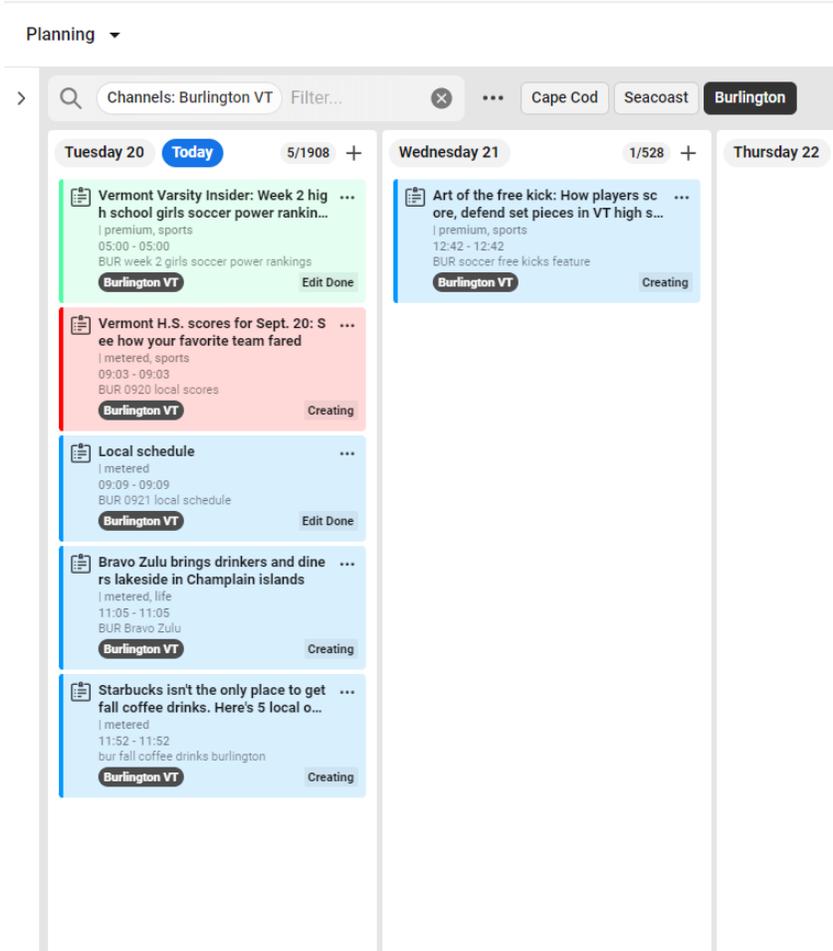
To find it, go to this chicklet in Okta. If it's not there, file a service desk ticket.



When you open the tool, you'll be brought to the **Planning View**.



The planning view is where all the planning cards in the network live. This view is to see what is being worked on and where they are in the editing process. Every story in Presto automatically has a card (no more nagging or extra steps!) It's a lot to look at until you set up your filters ([go here for directions on setting up a filter](#)). When you set up a filter, say for a specific paper you work for, the view becomes more manageable and looks like this:



This is it with set up to just show stories from the Burlington Free Press. You can adjust the view to show one to 10 days. The information on this screen is coming directly from Presto. The cards are set to the date that reporters have set in the Plan Date field of the Presto story editor, indicating when they plan to file the story.

While you could drag and drop the cards in this field, the date in Presto is the master date, and anytime the story is saved, the card will revert to the date in the story editor. Don't fight it. Instead treat this view as where you are keeping track of when stories will be filed. We'll cover keeping track of when stories are being published online and in print in a different view.

The information in the Presto planning cards is coming directly from the story editor as well, inputting information like Presto ID, slug, if the story is metered or premium, and headlines. The color coding is a visual indicating the publication status of a story. Green means published, blue means in progress and red means embargoed.

The cards also have a box on the lower right indicating the edit status that is mapping from the story itself. From here, you can quickly check if a story is in creating, in editing or done being edited.

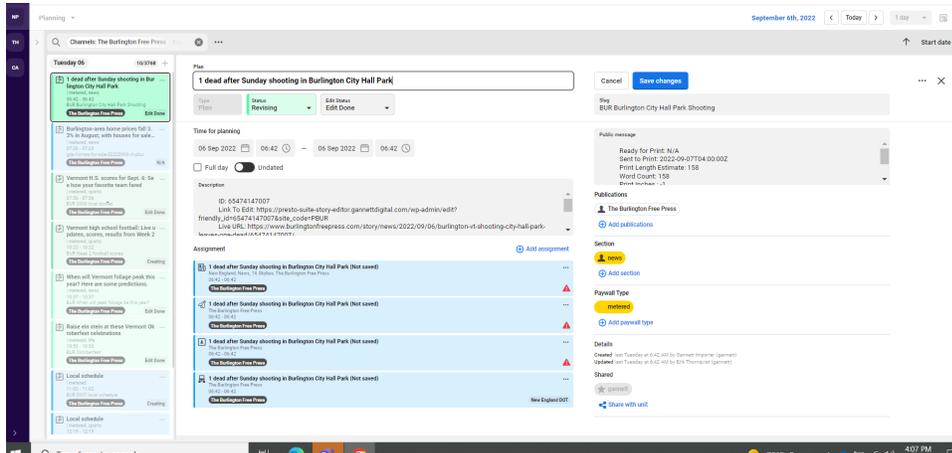
This is, in short, your best at-a-glance view to see how content creation is coming along. It's helpful to editors to keep tabs on what the reporters are doing, when stories are coming in, and the editing process. For planners, this is where you will get a sense of the same things that are helpful to the editors

and get a feel for if the plans are actually going to work out. For the DOT, they could use this view to get a sneak peek of what's coming, but it won't be the most helpful view to them.

### What happens if you click on a card?

There are two main reasons to click on a card: One, to get more information about a story and the assignments associated with it (more information to come on assignments) or two, to get more information about the story.

First, let's go over the information on a card.



This is the basics of what it will look like.

You get the headline across the top and below that the same information you could already see about a story's publish status and edit status.

Then you get the expanded notes field, which is where you will find the Presto ID, the link to edit the story in Presto and the live URL if it's been published. If the social chatter and push alert field have been filled out in Presto, those will show up here too. You can also put notes in this field of the planning cards, **but it's worth noting that this is a one-way street. Changes you make in Presto will show up here. Changes you make here will not show up in Presto.**

If a planner has been in the card, you can also see all the assignments associated with the card here. The assignments indicate what the action plans are for the story — when it will go online and in print, what type of boost it will have, when it is going on Instagram and/or Facebook, when it's running in the newsletter, etc. Anything that we do to share a story can have an assignment made for it. The assignments can also be for just one paper of a batch of papers. The list of papers underneath the headline will indicate that. This is the best view to look at everything happening to one story, which could also be considered the audience plan for the story. There is another view — the assignments view — that is a better way to get a sense of how all the assignments come together: what is your print budget, what is your Facebook schedule, etc.

In the right-hand side of this view, you have the slug, a text field with all the information the design center needs, the publication, section and paywall type. Ignore the share button. It's not applicable to us.

### Can you edit a planning card?

Yes, hitting the pencil icon in top right will allow you to edit.

There are two main reasons to edit a planning card.

- 1) Editing a planning card allows you to add the assignments. The guide on [adding assignments can be found here](#).
- 2) Editing the card will allow you to manually add notes. The benefit of adding notes is you can set up a free text filter to search for any word put in the notes field. Here's an example of why that's good news. For newsletter assignments, you can make a newsletter assignment for the story, but that's as specific as the request gets. You can't specify that the newsletter assignment is for the Your Week newsletter versus the Daily Briefing. However, if you put "Your Week" in the notes and then make a filter for newsletter assignments and free text "Your Week," you will get a list that is exactly what you need it to be. It makes the system extremely flexible, even if it will take some getting used to and some conversations for everyone to agree on what your notes need to include.

### Let's get acquainted with the assignments view

The assignments view is where you can see and manage how each of those stories will be used on the various platforms we use to reach audience. It is the to-do list associated with each story as well as the to do list that has been assigned to certain groups or people through the assignments created.

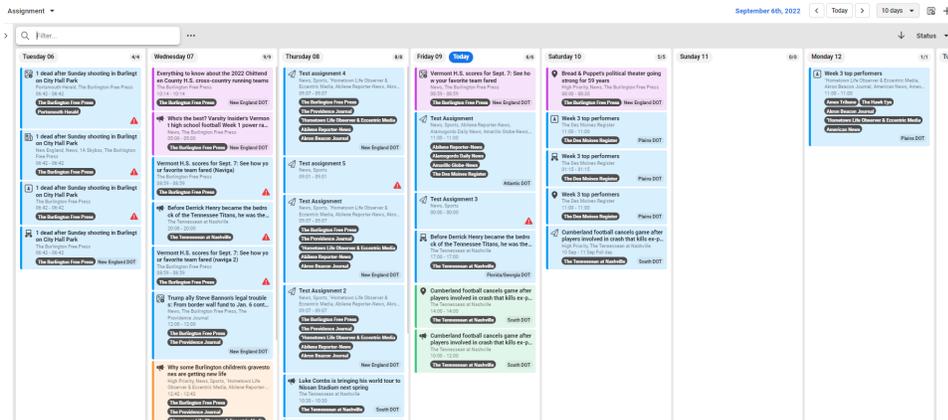
The **Assignments View** is as good as the filters you are using. [Here you can find a list of the ones](#) we recommend setting up. Once you've done the initial step of setting up filters and adding them to your favorites, it will be very easy.

**They are worth setting up right and checking with your colleagues to make sure you have set up the same filter if it's important that you see the same thing when you look in this view.**

This view is where planners will manage online publishing plans (including distinguishing between DOT publishing and newsroom publishing), print plans, Facebook schedules, Instagram schedules, newsletter assignments, push alert schedules, and other social media plans. This view is also where the DOT and, in some cases, editors will come to see what's assigned to them.

The filters can help you create views to see just print plans if you are finalizing the print budget for the next day. They could be adjusted to show you just the CP plans for the next week, or they can help you look at just what has been assigned to your DOT, seeing information from every paper they work with. his view is very flexible and customizable to your needs and should eliminate the need to be copy-and-pasting Presto IDs into two or three different documents.

Here's a peek at what it looks like with no filters:



Here's what you're seeing. The colors represent the edit status of the assignment.

Blue = draft: The planner has created the assignment to get the assignment card into this space to start doing their planning work, and they are not yet certain that this will be the plan.

Purple = plan set: The planner is confident that this is what we are doing, and the DOT can start working on it.

Yellow = DOT in progress: Someone has claimed and is working on that story. (In newsrooms that don't have DOT support, it could mean that an editor is working on it.)

Green = task done

To edit the status of an assignment card, you need to open the card, click the edit icon, change the status, and hit save changes to exit.

In the left corner, you can quickly see who the assignment has been assigned to. You will see the red triangle if the story hasn't been assigned to anyone.

As for the order of the cards, if you are looking at an online assignment they will be sorted by time. Print assignments will be sorted based on when they are made.

## Other buttons in the system



In the field that you toggle between planner, assignment and event on the left-hand side. **Don't worry about the event button, that isn't functional yet.** Eventually, it will become a way to link several stories together and plan for them as a group.

**On the top right, the squiggle isn't connected to anything. Don't worry about it.** The three bars next to that gives you some very basics settings, like keyboard shortcuts.

**Underneath that, you can set the date that you are looking at.** This system will hold all your data from the point of launch, so you could go back weeks or even months to see what happened on a certain day. **Next to that, you can control the number of days you are looking at.**

**Next to that is the notebook-looking button with a T in it. This is for setting up your templates for both planning cards that you create in this system that are not attached to a story in Presto and for assignments.** The template reflects your default settings when you start a new assignment, and you can have only one of them. For example, you might want to have your default setting include two publications if they often run the same story at the same time, or if you often send regional posts, you might want to have your default setting include all the papers in your region because it's quicker to delete from that list instead of adding them all every time.

**The plus sign next to that is to start a new card that isn't connected to a story.** You might need to do this for something outside the system, such as photo galleries.

**On the far left, the TH (Template Handlers) and CA (Concept Admin) buttons – don't worry about them at all.** They're not for you. The only one you need is NP.

