To help make the transition to another new tool a little bit easier, we've tried to keep workflow as similar as possible to what we've all gotten used to doing.

Reporters

- Create story
  - Set Slug
  - Set Planning Date - date and time you expect to turn the story in to editor
- Work on story
  - If your best estimate on a turn-in date/time changes, update the Planning Date in the story.
  - Don't forget story formatting:
    - H2s, when appropriate.
    - Links – inline and spikes.
    - Place photos, galleries, videos at top and throughout story, as available.
- When done
  - Set status to Ready for Edit
  - Alert editor that story is ready

Editors

- Wait for stories that are ready:
  - Reporters should alert editors in Teams when stories are ready.
  - Editors can also watch for stories in the planner, using the Ready for Edit view/filter.
- Edit story
  - **OPTIONAL:** Set status to Editing. For quick-turn stories, this is probably unnecessary. It's a good status to use for stories that are long-term projects or stories that may just need a couple days to be worked on.
  - When finished, sets status to Edit Done
  - If everything is finalized and no more edits are expected, click the Ready for Print toggle and hit Send to Print.
    - **NOTE:** Ready for Print is the equivalent of #r4p in the old system.
  - Check plans: Editors are encouraged to check the plans in the planner, and to discuss plans with their planner as needed.
- Take next step to move story along to the DOT, depending on regional preferences:
  - If it is set to Newsroom Publish, the editor would
  - Post Presto ID to Ready/Urgent channel in Teams, depending on plan and timing of story publication.
  - Notify your planner.

DOT

- DOT producers will be able to find and work on executing plans one of two ways: Either using a Presto ID or by filtering by assignments.

Commented [RT1]: @Peterson, Matthew For Edit Done and #r4p: There's also the Ready for Print toggle at the bottom; is that changing? We were also asked to continue to put #r4p in the package instructions for now, since anything else that indicated ready for print isn't showing up in CUE. Of course that will change once everything migrates, but a note for now.

Commented [PM2R1]: @Rodgers, Tiffany - good catch. we're still not using Suite yet, so i'm not nearly as familiar with all of that as i will be in a few weeks.

Commented [LK3]: @Peterson, Matthew I think this should be phrased more loosely to notify your planner and/or put it in the ready/urgent teams channel. We have a different workflow depending on the type of story. That being said, whatever the DOTs want is fine with me.

Commented [PM4R3]: Better now?

Commented [LK5R3]: Yes, thank you!

- Stories will be sent to the DOT w/ Presto ID and a brief description to confirm the correct ID is being used
    - Watch in Ready/Urgent/Planning channels in Teams for stories coming in
    - Producers can also watch for stories, using the Editing/Done Editing view/filter.
- Look up story in Planning with Presto ID.
  - Step-by-step:
  - ***UPDATE THIS WITH NEW SEARCH INFO – INCLUDE SCREENSHOTS**
    - Clear your filter in the Planning view.
    - Paste in the Presto ID, and select "Freetext: PRESTOID"
    - Should return just the plan for that story, giving quick access to all the assignments.
  - Make sure plans are also set to Plan Set; tag in your planner if they are not.
- **AND/OR** Watch the assignments to see what needs to be handled that wasn't sent through channels, only through Digital Budgets.
  - Select the "Assignment" view and filter for assignments by individual producer or by regional DOT. It is recommended here that the DOT producers use a 2-day view
  - For assignments marked "Plan Set" begin in to execute them
  - To see an entire plan for the story where you have an assignment selected, click on the link under "Belongs to the Planning"
- Execute plans
  - Make notes as needed in the plan or individual assignments.
  - Once finished with each, set Plan Status to DOT Done.

Planners

- Watch for stories coming in the next few hours/days.
- Set assignments for stories, based on their Planning Date estimate.
  - Edit the plan.
  - Click Add Assignment.
  - Select the Assignment Type.
  - Set the date and time (may be specific time or a window of time, depending on regional DOT preferences) for the Assignment.
  - Set other field values as needed (Assignees, Priority, etc.)
  - Click "Add assignment" in the top right.
    - **NOTE:** Don't click the X in the top right – if you click Close, it will lose any work done on this assignment.
  - Repeat for as many assignments as you're wanting to add.
  - When done and back on the main plan, click on "Save changes" on the top right.
    - **NOTE:** Don't click the X in the top right – if you click Close, it will lose any work done on any and ALL assignments or changes since the last time "Save changes" was clicked, if at all.
- Set each assignment to Plan Set when finalized.
- Export print budgets.
  - See separate listing for using the print budget export tool.
- Use filters to keep an eye on the overview of assignments for all platforms planned for.

- **Newsletters note:**
    - Add the name of the newsletter to description field.
    - This allows there to be a filter just for that text to show just those newsletter assignments.
- **Print notes:**
    - Make sure the Print Run Date matches your print plan for the story. This will ensure it goes to the right date in Cue, whenever it gets sent to print.

Other notes