

Spec: Edit Flow Project

Goals:

The overall goal of this plugin is to improve the WordPress administration interface for a multi-user newsroom's editorial workflow.

Through discussions with existing newsrooms that use WordPress as their CMS of choice, we have identified the following weak points within the WordPress administration interface in the context of a multi-user environment:

- the editorial workflow is limited and does not scale well where numerous individuals interact with a single Post or where more complex editing workflows are required;
- the editorial workflow is not conducive to planning of future content (while the Draft feature does facilitate this to some extent, the existing feature set does not scale in scenarios where different users are responsible for different components of a Post, or different steps within the workflow); and
- the ability for users to communicate within the administration interface is limited, in regards to both the planning of future Posts/assignments and during the editing process.

While existing plugins do solve various facets of the workflow issues we raise, our aim is to provide a comprehensive solution that eases editorial workflows within WordPress, to (a) encourage its use as the primary content management system for newsrooms; and (b) facilitate web-first publishing for traditionally print publications.

It should be noted that while we are targeting newsrooms in particular, our aim is to design a flexible solution that can be used by multi-user blogs with varying demands from their editorial workflows (e.g. VentureBeat).

There are a few key components to this project: improving the meta data on top of Posts to better reflect the information that needs to be recorded about an assignment, empowering newsrooms to manage more of their editorial workflow from within the WordPress Administration interface, and building out a way to track all of this active meta data within the system as a way of visualizing content and priorities at a glance.

Sample Use Cases

Existing Workflow

Without using any plugins that significantly enhance their management abilities, the Mustang Daily, a student newspaper at Cal Poly, [currently has an editorial workflow as follows](#):

1. *Pitching and assigning*: Editors and reporters put story pitches into a Google Spreadsheet with columns for information about the assignment.
2. *Posting articles*: Reporters post their completed articles into WordPress (usually by pasting from a Word Document). Save as "pending review." The reporter then e-mails the section editor the same copy of that article for record-keeping purposes and to inform the section editor the article is ready to be edited.

3. *Copy editing*: The first day copy editor (shifts start around 10 a.m.) logs into WordPress to see what new articles are pending review. The copy editor also checks the Google Doc to determine which articles have priority based on publish date and whether that article has been read by the section editor. After editing articles, the copy editor signs off on the Google Doc with his/her initials. Can also call/e-mail reporter with questions or re-write request. If a section editor, editor-in-chief, managing editor, or online editor has also copy edited the article and signed off on it, the copy editor can then publish the article to the site.

Predicted Workflow

We're hoping that installing the editorial workflow plugin will help newspapers like the Mustang Daily to better manage their editorial workflow. The base workflow might look as follows (although varying degrees of customization would be offered):

1. *Pitching and assigning*: Anyone on staff can add a pitch through the "QuickPitch" dashboard widget. Meta data related to the pitch is stored in the custom fields of a new Post. The pitch will come to the attention of a section editor because it is assigned to the category they are responsible for. Notification happens through email and/or the activity stream. Editor approves the pitch, suggests a publication date, media requirements, etc.

2. *Writing and publishing articles*: The story is in progress. Reporter writes a first draft but has a few questions about one of their interviews. The reporter leaves their questions as a comment and leaves a status of "Waiting for Feedback." Editor is again notified through email or the activity stream and responds. Reporter makes revisions and then marks the story as "Waiting for final edit". Editor edits again and then publishes the Post.

Stages:

1. More post status flexibility - Improve post statuses by allowing custom statuses.
 - Features might include:
 - Ability to "turn on" and define custom statuses, and then designate those custom statuses while editing Posts
 - Statuses made visible on the Edit Posts screen, with the ability to filter by status
 - Timeline for implementation:
 - Architecture and design - May 19th
 - Development - May 29th
 - Alpha testing - June 3rd
 - Beta testing - June 7th
 - Release - June 8th
2. Add newsroom-specific meta data to posts.
 - Some features:
 - A short description of the assignment
 - The location of the assignment (if applicable)
 - Assignment due date
 - Expected publish date
 - Approximate number of hours to complete the assignment (with the option to record the actual number of hours)
 - Multimedia (Photos, Video, etc.) requests

- Any notes or contact information about the assignment
- Ability to "assign" an editor to the post
- Comments or notes about the Post between users (would be threaded to allow for discussion)
- Timeline for implementation:
 - Architecture and design - June 10th
 - Development - June 17th
 - Alpha testing - June 22nd
 - Beta testing - June 25th
 - Release - June 26th

3. Defining custom usergroups and workflows, and adding email notifications. Features would include:

- Features:
 - Workflows - consist of separate tasks that a Post would have to work through from pitch to publish
 - User groups are more granular definitions of a user's permissions, as related to the custom editorial workflows. Groups would defined in user profiles, and a user could be a member of more than one group (i.e. "reporter" and "editor")
 - Email notifications for changes within the system that you need to know of
- Timeline for implementation:
 - Architecture and design - June 23rd
 - Development - July 14th
 - Alpha testing - July 23st
 - Beta testing - July 29th
 - Release - July 30th

4. Introduce a pitch system that would be accessible from the dashboard ("QuickPitch"). Contributors, authors, and editors would be able to pitch assignments. This information would be stored as the meta data/custom fields of a new Post.

- Timeline for implementation:
 - Architecture and design - July 29th
 - Development - August 5st
 - Alpha testing - August 9th
 - Beta testing - August 11th
 - Release - August 12th

5. Create activity stream dashboard widget to track, manage, and visualize all of this information changing within WordPress (with the possibility of importing external RSS feeds as well).

- Timeline for implementation:
 - Architecture and design - August 9th
 - Development - August 31st
 - Alpha testing - September 7th
 - Beta testing - September 14th
 - Release - September 15th