

The new budget tool

The new budget tool on the Internet Explorer browser is simple and easy to use. Since it's different than our current system, it'll take some getting used to. We've been testing it in Features since March. The more we use it, the easier and more convenient it becomes.

The budget tool is a database so we won't have to create a separate Word document for every section's budget. We'll create budget lines and see a section budget through an Internet Explorer browser window. We'll create budget lines on a web-page form. We use web forms to buy books on Amazon, to do archive and Nexis searches, to request a photo assignment. This is similar – just fill in the blanks and click to create a budget line or retrieve a budget.

A couple things new & improved about this budget tool.

1. More than one person at a time can budget stories for the same section for the same day. No more Trainee11 locking up budgets.
2. The new budget tool has flexibility for creating custom budgets. You could bring up a list of stories budgeted for only the front pages of all sections for a day. Or a list of all budgeted stories being done by reporters on the Learning team, no matter what section. Or all centerpieces budgeted for the next four Mondays.

How does it work?

Click the Budget link on The Big O.

In the Web page, there is a form on the left side. You use the form to tell the Web page which budget lines you want to view or print. For example, to view the Local budget:

- Type in a pub date at the top of the form.
- Check the box for Local.
- Click on the Get button or press enter.

Budget lines will appear on the right side of the page.

Following are detailed instructions if you need them.

Remember, this is a database. If you click the wrong box or type incorrect information, you won't get what you want. The computer returns the information you ask for.

The screenshot displays the 'Budget Tool' interface within a Microsoft Internet Explorer browser window. The browser's address bar shows 'The Budget Tool - Microsoft Internet Explorer'. The page is divided into two main sections: a form on the left and a list of budgeted stories on the right.

Form Section (Left):

- Budget** (Section Header)
- Buttons: Get, Clear, New item, Printer friendly version
- Pub date:** (mm/dd/yy) or (mm-dd-yy). Input: 10/07/01 to []
- Fronts only?**
- Section:** A grid of checkboxes for various sections: Asection, BizMon, BizDaily, Local, Perspective, Sports, Arts, EandT, Faith, Family, Food, Garden, Health, Home, SunLiving (checked), Travel, Cabarrus, Catawba, Gaston, Iredell, Meck, Union, York.
- Slug:** []
- Reporter:** []
- Package:** []
- Day:** Mon, Tue, Wed, Thu, Fri (checkboxes)

Story List Section (Right):

- Page: Front
- NEWSOUTH**
Preview for the opening of the Museum of the New South, which is actually a walk through the history and heritage of Charlotte.
Visuals: Centerpiece graphic by Jake
Editor: ring **Reporter:** richard **Play:** CP
ForEd1 ForEd2 ForEd3
- CURTIS**
Mary's column
Visuals:
Editor: Weinstein **Reporter:** Curtis
ForEd1 ForEd2 ForEd3
- SHIRT**
- DOWNPAGER WITH ART Want to make a shirt to show off your

Create a budget line

Open Internet Explorer and click the budget link.

Click new item, and the budget line form opens. (*Tip: Use the tab key to jump from field to field.*)

Slug: Enter the slug. Just the name of the story. You don't need an edition number or date.

Check the date. The form defaults to tomorrow's date, so if you're working in advance, you'll need to change it right away.

Section: Use the pick list.

Reporter: Add the reporter's name.

Editor: Add editor's name, if you know who'll be editing.

Length: Think of your readers.

Team: Use the pick list.

Package: Same as the package field in CCI. Use it to sort stories, such as "terror." You can use it for packages with multiple stories.

Play: If the story is a lede, centerpiece or strip click the button. The budget lists stories in order of importance. If you don't know play, don't do anything. It defaults to "All."

Page: Use the pick list. If the story is going on the front, select `_Front`; if you think it's going inside, select `_Inside`. Options include `_Page 2` and other themed pages. This is important for organizing budgets that include themed pages. You'd pick `_Page 2` for Gerry Hostetler's column that appears in local or Newsmakers that appears on 2a or a column that appears on the Investing page in Sunday Business.

Flags: Check whatever box applies.

Description: Go to the description box and enter a budget line. Be concise. Describe your story in declarative sentences. Or you can copy and paste the top of your story. Fill in the deadline information.

Visuals: Enter information about visuals, just like you do now: subject, date and time of a photo request or maps and graphics. Be as specific as possible.

Save: When you're done with an item click Save item, then the budget takes you to the previous window. If you click clear, you'll eliminate everything you've typed.

Budget

Clear Save item

Pub Date (mm/dd/yy) 9/16/01

Slug sweater

Section SunLiving

Reporter Crystal

Editor Greg

Length 180

Team CaroRoots

Package

Lede CP Strip All

Play

Page `_Front`

Flags Photo Graphic SpaceReq Maestro Promo

For 1st 2nd 3rd edition

In 1st 2nd 3rd edition

Zone 1st 2nd 3rd 4th

Delete item

Description

Lindsey Ashcraft wanted to do something to help when her friend was diagnosed with breast cancer. Ashcraft, who owns Double Take Ltd., put "how-to" self-exam cards in her store newsletter (circulation around 15,000). But that wasn't enough. Ashcraft contacted designer Michael Simon about doing a pink sweater that would benefit breast cancer research. Simon got caught in other projects and didn't have time to do it. Ashcraft put pen to paper and did a rough design of what she had in mind. Simon loved it. The sweater will be featured during the Southern Women's Show Sept. 20-23.

DEADLINE to ed: noon Sept. 6
DEADLINE to rim: noon Sept. 7

Will a big box

Visuals

Photo of Lindsey Ashcraft, the sweater and Diane Ballard, the friend with breast cancer. Also mug of the designer Michael Simon

Call up a budget line or section budget

Type in the information you want, then click Get on the top left of the form (or press enter). The budget appears on the right side of the screen.

Call up a budget line:

Type the slug and click Get or press enter.

To edit the budget line, put your cursor over the budget line and click. Make changes and click save.

Tip: The budget's memory will automatically enter that slug under the slug field. So remember to delete it when you're done otherwise you'll probably have trouble doing other searches.

Call up a budget:

Pub date: Type in the mm/dd/yy you want, click the sections you want, hit enter or click Get

The budget appears in the window. You can edit any budget line by clicking the link for that item.

Notes & tips

- The budget remembers you. It'll fill in some of the blanks (reporter, team, section, etc.) by default every time you create a budget line.
- If you use the budget a lot during the day, leave the browser window open when you're done. Just minimize it. It'll be on your task bar when you need it. Minimizing instead of closing it will save time. Open another browser window for using the Web.

Administrative, deadline info: To put notes on the top of the budget, create a new item, slug it NOTES and select _ForYourInfo under the page pick list. That will put the note at the top of the budget.

Wire budgets: To copy and paste wire budgets, copy the budget, create a new budget line, slug it (NCWIRES, SCWIRES, NATWIRES), paste into the description field and save.

To Delete a budget line: To delete a budget line, open the budget line, then click the delete item box

Printing: Click print on the top of the browser window or click "Printer Friendly Version" on the top left, then click print. You can print a single budget line if you have it open. Just click the print button on the browser window.

If budget lines are cut off on the right margins, go to the File/Page setup pulldown menu and make all the margins .5"

Standing features: Do this to save time. If you have standing features that appear on different pages, create a slug called STANDING or INSIDE and budget each item/story in the description field.

If you have standing features that appear on specific pages, create a slug with that page name, such as TOOLBOX, COLLEGEHOOPS, BASEBALL, INVESTING, etc. Then budget each item/story in the description field.

The screenshot shows a web browser interface. On the left is a 'Budget' form with the following fields and options:

- Buttons: Get, Clear, New item, Printer friendly version
- Pub date: (mm/dd/yy) or (mm-dd-yy) with input fields for month, day, and year.
- Fronts only?
- Section: Asection, BizMon, BizDaily, Local, Perspective, Sports, Arts, EandT, Faith, Family, Food, Garden, Health, Home, SunLiving, Travel, Cabarrus, Catawba, Gaston, Iredell, Meck

On the right is a preview of the budget for 'The Big O' on '10/14/2001'. The page is titled 'Budget' and is from 'The Charlotte Observer'. The results show 1 story. The page is categorized as 'Arts' and 'Page: Inside'. The main text of the story is:

INSIDE
country by mark price;
artswalk (haight);
puzzle;
bridge
brinkley: News organizations everywhere are turning to the same guy for insight and perspective — a fresh-faced, tousle-haired historian from the University of New Orleans. Douglas Brinkley delivered — as he so often has in recent years — with cogent quotes and compelling historical detail, helping the nation understand the horrors of Sept. 11. available if needed

At the bottom, there are 'Visuals:' and 'ForEd1 ForEd2 ForEd3' links.