How to use Flow to manage an editorial calendar

Flow is an online task management tool which helps teams to collaborate. We use Flow to organise our editorial calendars. These help us manage content creation and scheduling of messages, which we distribute to our audiences through our digital channels.

To make sure these calendars work, it's important we keep them consistent so we've created some simple guidelines for you to follow. If you need help using the tool, Flow have put together some useful tutorials to help get you started

How calendars work
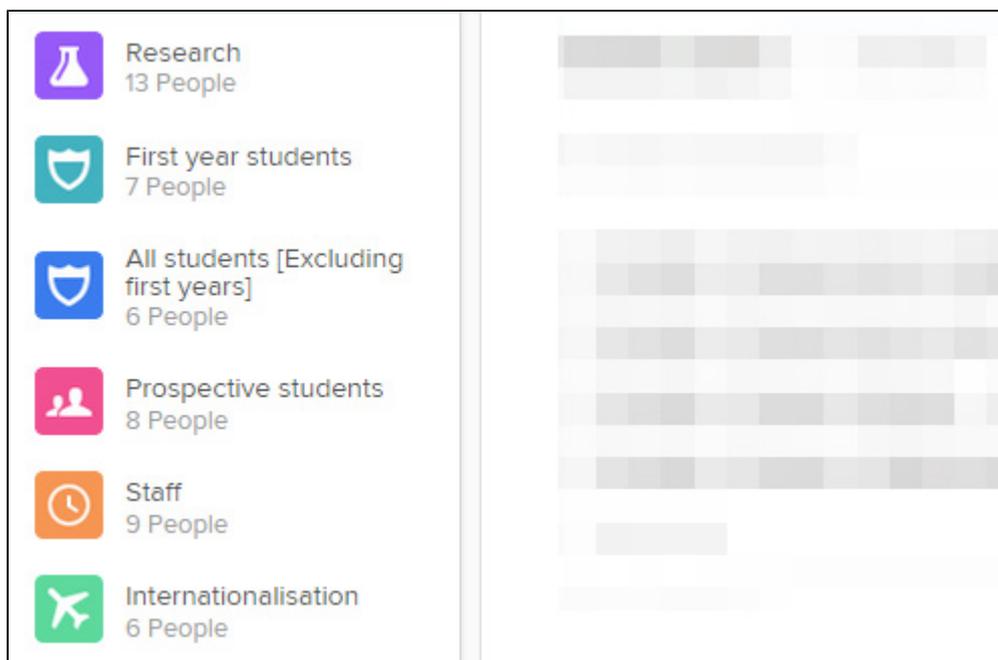
We've set up 7 calendars using Flow. These are based on the type of people we regularly talk to, including prospective students, First Years, all other students and people who are interested in our research.

We organise Flow in this way so we consider users' need first.

Marketing and Communications use an overview of all these calendars to coordinate outgoing messaging and to make sure our audiences get timely and relevant information. Working in an open way helps us to prevent clashes and make sure that we don't duplicate messages.

Before you add a task

All content created for bath.ac.uk should address a specific need. Before adding a task to Flow, you should write a brief statement outlining who you're trying to reach and what you're trying to achieve.

This statement will help to focus on your audience, what their needs are and make sure you create the right content for the right channel. If you're not sure what the purpose of the content is, you should talk to the Editor who commissioned the content.

Creating a task in Flow

When creating a task in Flow you need to make sure it contains enough information so that other users can easily understand the task and filter the calendar.

Start by navigating to the right calendar and the right content type (listed in the left column, under the calendars). You can switch the view from a horizontal task listing to a Kanban column view using buttons in the top right corner (under "New").

Filling in the fields on a new task

Task name

Make your title as self-explanatory as possible.

Workspace and Project

Workspace and project fields will have autofilled using the calendar and the content type you navigated to before creating the task.

Due Date

Only choose a due date if your item has a definite due date. An item won't appear in the calendar view before it has a due date, but you will be able to see it in the Kanban column view among other items of the same content type. If your item has an embargo, you should indicate this clearly by adding it as a Subtask.

Assigned

Assign the task to the person creating the content. If this isn't you, click the cross after your name (which has autofilled) and your name will move to the subscribers field.

Subscribers

Subscribe anyone who needs to do something with the piece of content the task is about (e.g. promote it on the research landing page or internal staff page). Only choose the essential people - you can always add more later or people can subscribe themselves.

Tags

Use tags to indicate which channels the item needs to be promoted (e.g. external homepage and/or research landing page). Start typing and tags will appear - no need to use the # symbol. For social media channels, use the format 'channel - account' as a tag, for example 'Twitter - @uniofbath'

Subtasks

Use the Subtasks field to briefly explain the point of the item to someone who hasn't heard anything about it (PITCH) and what the purpose of creating that particular piece of content is (GOAL). You can also add real tasks that need to be completed before the main task is done. Subtask is also the best place to indicate if the item has an embargo.

Comments

Use the comments box for any additional info, further updates, the copy, relevant links or to upload images.

Choosing a content type or item

When you create a task you'll need to add a content type or item

Available content types:

- Announcement [Media release] - A story targeted at journalists
- Case study - A description of a project or service
- Blog post
- Event - An activity taking place on a specific date
- Profile - A biography for a member of staff
- Social - Promoting an existing piece of content in social media.

Available content items:

- Photo
- Video.

How to flag third-party channels

When you add a tag for an external third-party channel, it should be in the following format 'channel - account' or 'publication name'. For example:

- 'Twitter - @uniofbath'
- 'The Guardian'.

Managing tasks in Flow

When you work on a task, you should:

1. When you start work on an item, move it to "Doing" in the Kanban view.
2. Use the comments box to brief people on progress and/or ask questions.
3. As soon as you know the aimed publishing date, add it in so the item will appear in the calendar view. If the date isn't fixed, add a "tentative" tag.
4. Move to "Review" column when you've sent the content for sign off. Move to "Stopped" if it's ready to be published but waiting for something to happen before going live.
5. When you've completed a task, move to "Done". Don't tick the task box as this will make the item disappear from Flow.
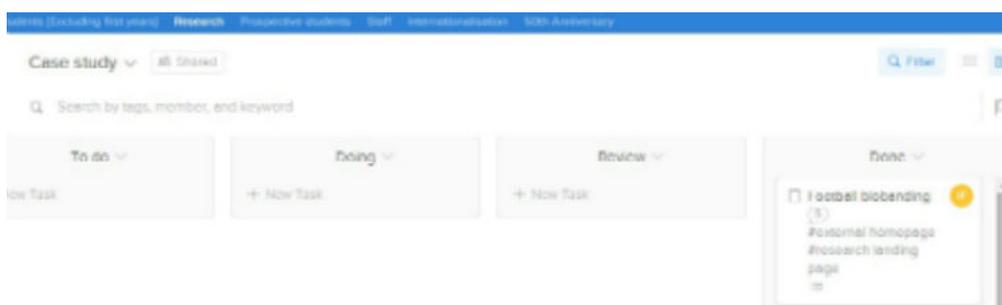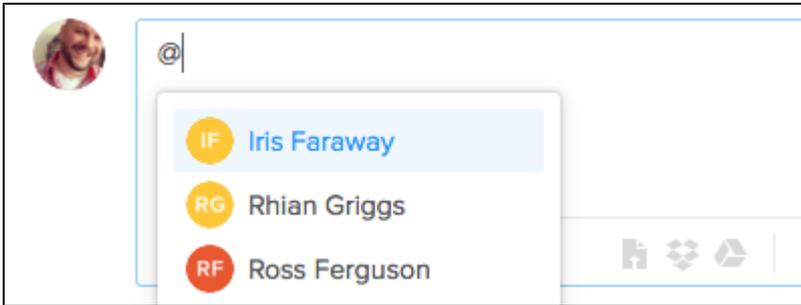

For tasks which are placed on hold or stopped, you should add the tag 'On hold' or 'Stopped'. Using these tags will help you to keep track of progress.

Taking down links

If you need to remove a link to a campaign, story or event from a landing page, you should create a separate task, add a due date and the tag 'Take down'.

Talking to people

If you want to talk to other people about the task, you can mention them by typing '@' in the comments box. This helps to share knowledge and means that they don't have to email or call to find out what's happening - reducing the number of emails in your inbox.

Viewing tasks and filtering them in Flow

Flow allows you to view different groups of tasks.

- 'Project' will allow you to see all the content of that type scheduled in a list. You can also use the tags to filter.
- 'Calendar' will allow you to see a month by month view. You can also use tags and projects in the same view to filter scheduled tasks.

Kanban view

You can access Kanban view through the Content types that we have set up under 'Projects'
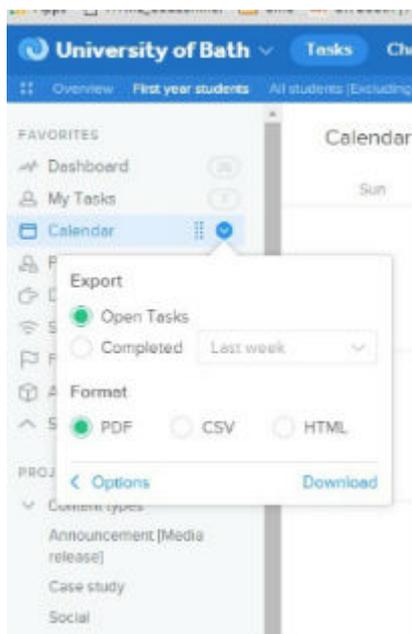
- Choose the content type from the menu
- Select the Kanban View icon in the right-hand corner
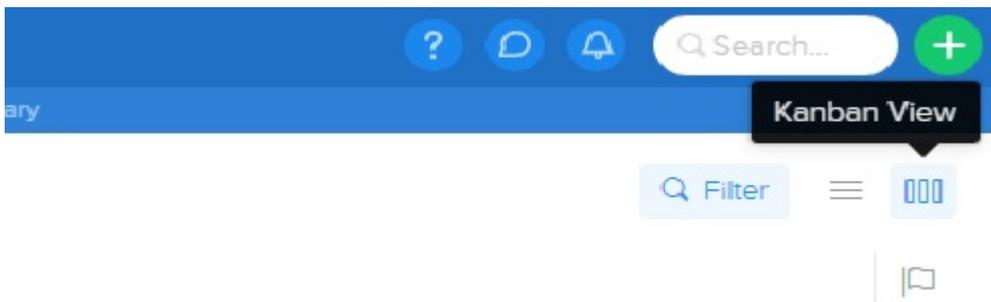
Sharing calendars with people who do not have access to Flow

You can share the calendar with people by exporting it so that you can email it as a document.You can choose open or completed tasks and have three formats to choose from.

- Go to the drop down from the calendar

- Choose the format that you would like to export.
- Download it to your preferred location

Any questions?

As we continue to use Flow, we will iterate on these guidelines. If you have any questions then email web-support@bath.ac.uk

- How to use Flow to manage an editorial calendar
- Tone of Voice & Style Guide
- PGT student journey - editorial calendar