

Projects Monitor Manual



Brandwatch

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Query Writing

If you are looking for a more visual explanation, [this video](#) contains a walkthrough of how to think about, write, and check a query for an [REDACTED] project.

Query Formatting

Projects Monitor Formatting

This first section is focused on formatting the [REDACTED] Projects Monitor query.

Every paragraph is a query for a specific project. Each of these needs to be enclosed by a set of parentheses in its entirety and separated from each other by an OR operator. This allows you as the editor to distinguish between projects.

All the projects are grouped in the query by state, with the start of a new state being denoted by <<<STATE Projects>>>. Any text contained within these double brackets <<<>>> is considered a comment, meaning it has no effect on the query and serves only as text for the query writer.

General Query Formatting

Now we're going to look over some general formatting tips when writing queries:

The OR and AND operators are foundational. Because they both denote choices between options, items on either side must be enclosed by parenthesis so the system can identify them. The logic outlined in the following example applies to both the OR and AND operators.

Example:

"Apple pie" OR (Apple NEAR/5f (tart OR pastry))

In the above example, the system is being told to look for mentions of "apple pie" **or** any time the word "apple" is within five words before either tart or pastry.

In the second OR statement [tart OR pastry], the options are simply one word so there is no need to enclose each option in parenthesis.

But in the first OR statement ["Apple pie" OR (Apple...)] we see that the first option "Apple pie" is multiple items that are contained within quotation marks. But the second option [(Apple NEAR/5 (tart OR pastry))] is complex because it contains a set of operations. All of the operations that define this second option are contained within a set of parentheses so the system can tell that the second option is the word "apple" within five words before tart or pastry.

Remember, a query is just a set of conditions that, if met, tell the computer to save the web page as data. If I simply write the word "apple" as a query, the system will pull every page that

has the word “apple” in it. I can add new conditions to make the requirements more stringent and get more narrow data.

Example Query Breakdown

Next, we will look at an example project query and break down what is happening.

```
("████ Solar" OR ((Darien NEAR/10 (Solar OR #solar OR #solarenergy OR #solarpower))  
AND (project OR generator* OR farm OR center)) OR (Darien AND (solar OR #solar OR  
#solarenergy OR #solarpower) AND (████ OR #████ OR #████ OR  
@████ OR @████ OR links:████.com)))
```

The query can be separated into 3 statements:

```
("████ Solar"
```

OR

```
((████ NEAR/10 (Solar OR #solar OR #solarenergy OR #solarpower)) AND (project OR  
generator* OR farm OR center))
```

OR

```
(████ AND (solar OR #solar OR #solarenergy OR #solarpower) AND (████ OR  
#████ OR #████ OR @████ OR @████ OR links:████.com)))
```

Each is contained within parentheses or quotation marks and separated by an OR operator. Each of these is a set of conditions. If one of these sets of conditions is met, the system records that page.

The first section opens with a search for any mentions of the name of the plant █████ Solar”.

This is a useful thing to add at the start if the name is not common. "████ Solar"

If the name of the plant is common, such as a town name, then it can be useful to cut this out in favor of just the following section. It’s important to note that this general name query will pick up on the explicit name search from above. It can be redundant at times but it is a good habit to build in just in case you write a general name search that does not capture the full name:

```
(( [REDACTED] NEAR/10 (Solar OR #solar OR #solarenergy OR #solarpower)) AND (project OR generator* OR farm OR center))
```

This searches for when the first term of the name “[REDACTED]” is nearby (within 10 words of) a multitude of variations of solar (Solar OR #solar OR #solarenergy OR #solarpower)), while the second section looks for it to be near a mention of nouns associated with these sorts of solar projects such as farm, project, etc. (project OR generator* OR farm OR center)

The third section takes a broader approach. While the second section looks for keywords close to each other, this second approach looks for the project name “[REDACTED]” and a variation on solar being mentioned anywhere on the same page.

```
([REDACTED] AND (solar OR #solar OR #solarenergy OR #solarpower))
```

This is too broad though and could pull in irrelevant pages that happen to discuss solar, weather, energy project ideas, etc., and the name [REDACTED]. So to hone this portion of the query, there is an added segment:

```
AND ([REDACTED] OR # [REDACTED] OR # [REDACTED] OR @ [REDACTED] OR @ [REDACTED] OR links:[REDACTED].com))
```

The AND means that the system must find something that satisfies this section along with the first half mentioned above. This second section looks for any mentions of [REDACTED] via name, hashtag, @, or hyperlink on the page. The reasoning being that not all relevant pages will have the key terms near each other, they may be scattered on a page that discusses the town of Darien, solar energy, and the [REDACTED] company.

Query Practice

Now that you’ve read through the process here is the link to this video again where you can find a walkthrough of how to think about, write, and check a query for an [REDACTED] project.

I also recommend going through the full [REDACTED] projects Monitor query and trying to parse through what each line of Boolean is accomplishing.

In the next section, you will find a key with the operators, explanations, and examples in case you come across some unfamiliar syntax.

Query Operators Resources

Below are explanations of the most common operators in the [REDACTED] Projects Monitor. You can find a library of basic operators [here](#) and intermediate operators [here](#). A reminder that **capitalization matters** when typing out an operator.

AND — Tells the system to pull content that contains both items anywhere on the page.

Example: apple **AND** pie will look for pages that contain “apple” and “pie” in them.

Remember that as long as both are mentioned on the page, the content will be pulled.

Even if they are in separate paragraphs and not related at all.

OR — Tells the system to pull content that contains either of the items anywhere on the page.

This means that if one is present but the other isn’t, the content will still be pulled.

Example: color **OR** colour will pull content that mentions the word “color”, regardless of whether it is spelled the American or British way.

“ ” — The quotation marks allow you to look for multi-word phrases mentioned in the content. If multi-word phrases are typed without quotations the system gets confused.

Example: “**radio shack**” will find when the exact phrase radio shack appears.

NEAR/x — Tells the system to find when the first item appears within x words (before or after) of the second.

Example: Brady **NEAR/5** Patriots will find any time Brady is mentioned within 5 words of Patriots, so both: “Tom Brady of the New England Patriots” and “The former Patriots quarterback Tom Brady” will be captured by the system.

NEAR/xf — Works the same as the NEAR/x operator except it only catches instances when the first item is within x words before the second item.

Example: Brady **NEAR/5f** Patriots will catch “Tom Brady of the New England Patriots” but will not catch “The former Patriots quarterback Tom Brady”.

— Will look for hashtags rather than just a keyword. When a keyword has a hashtag in front it will not be caught by a simple keyword search.

Example: #Ohio will catch anytime the hashtag appears, while a simple keyword search for Ohio will not catch hashtag mentions.

@ — Will find instances of @ mentions online that a simple keyword search would not catch.

Example: @POTUS will catch any time someone @'s them on social media while a simple keyword search for "POTUS" will not.

links: — Will find any time a specific hyperlink appears. This includes shortened links to the mentioned site.

Example: links:270strategies.com finds anytime 270strategies.com is hyperlinked, even if it is hyperlinked to another term like [this](#).

{ } — Will perform a case-sensitive search and will only pull when the words contained within match both in characters and capitalization. Normal keyword searches do not care about capitalization.

Example: {MA} will only pull MA. A simple keyword search for MA would pull both MA and ma and Ma and mA.

* — Called the Wildcard, this can be applied to search for any word with the root word.

Example: complain* will catch complain, complaints, complained, etc.

<<>> — This creates a comment in the query editor. Comments are not read by the system and act purely as notes for the person viewing the query.

Categories & Rules

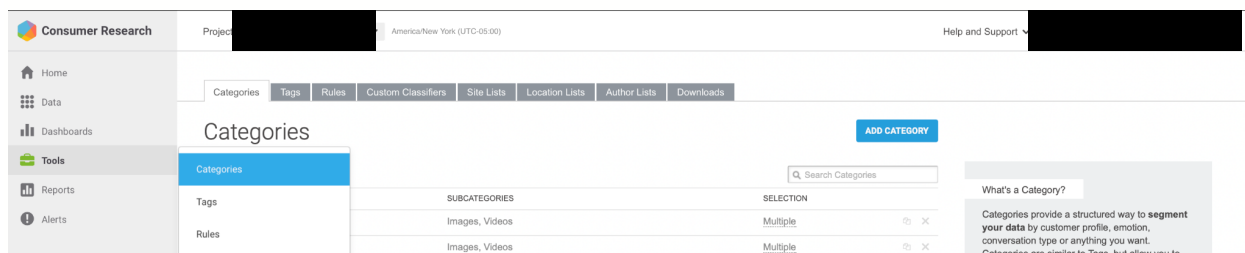
Once you have a query you will need to create 2 new rules and categories to add the data to the dashboard. This video [works backwards](#) from the dashboard to explain how categories and rules work as well as how to use them to add to the [REDACTED] Projects Monitor dashboard.

Think of a **category** as a bucket. The queries pull massive amounts of data, but you may only want to reference or visualize a portion of it. A category allows you to segment the data to display only the relevant portions. A common use of categories in the [REDACTED] Projects Monitor Dashboard is segmenting the projects by state.

For the categories to work, they need to know what data from your query should go in the bucket. This is where **rules** come in. A rule is a boolean query that searches through and pulls the relevant data from the data in a query.

Once you have your project query written into the larger [REDACTED] Projects Monitor Query, here are the steps needed to add the necessary categories and rules to integrate it into the dashboard:

Adding Categories

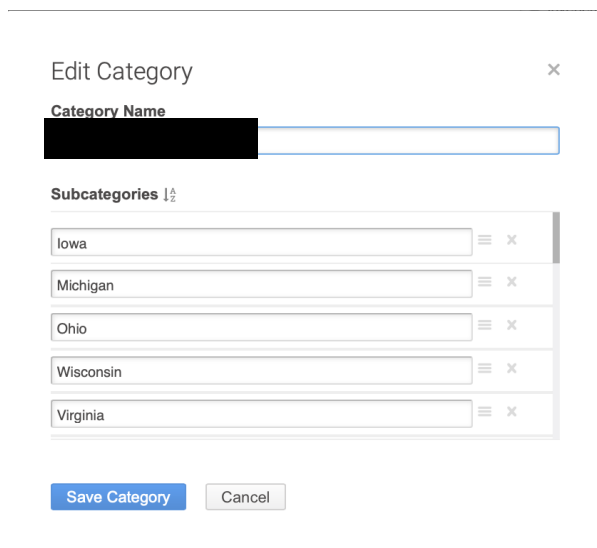


First, navigate to the Categories section in Brandwatch and use the search bar to find the "[REDACTED] Projects Monitor" category.

Categories

			ADD CATEGORY
			[REDACTED]
CATEGORY NAME	SUBCATEGORIES	SELECTION	
[REDACTED]	Iowa, Michigan, Ohio, Wisconsin, Virginia, Palo Alto Solar,...	Multiple	✕

Next, click on the blue category name and you will get a window that looks like this:

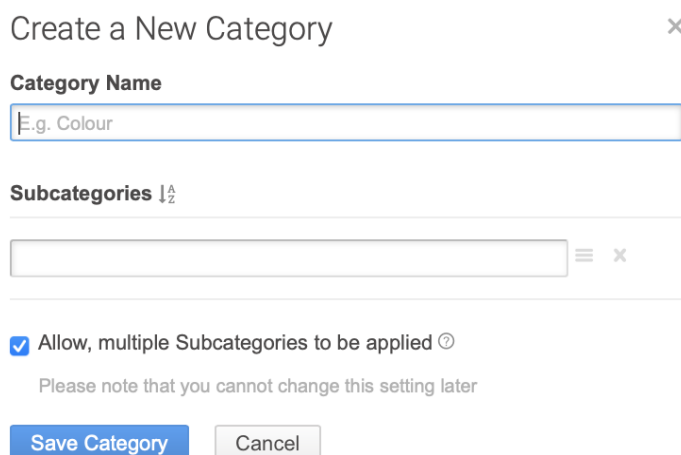


Scroll down to the bottom of the subcategories list and in the empty box type the name of the new project you are adding.

If you are adding a new state, add another subcategory that is the name of said state.

Click the blue “Save Category Box” to save.

If you are adding a state, click the blue “Add Category” box in the top right, and the following window will appear.



Name the category “IPM - STATE” where STATE is the name of the state the new projects are located.

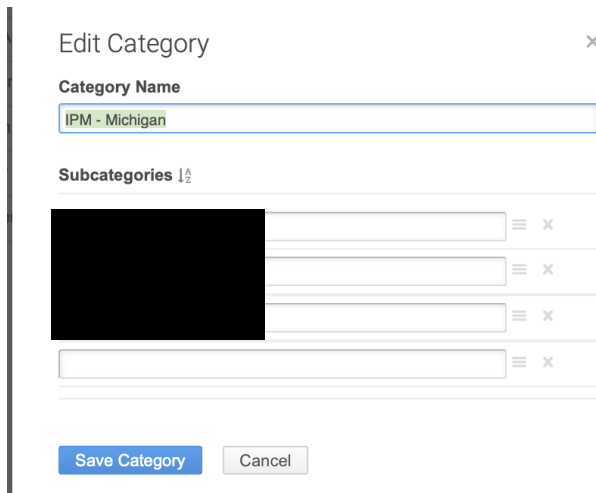
Under the subcategories, add a new subcategory for each project located in that state.

Then click the blue “Save Category Box.”

Go back to the search bar and find the category called “IPM - STATE” where STATE is the name of the state the project is located in.

Categories			ADD CATEGORY
			IPM
CATEGORY NAME	SUBCATEGORIES	SELECTION	
IPM - Iowa	Palo Alto Solar, Shenandoah Hills Wind, Worthwhile Wind...	Multiple	
IPM - Michigan	Mustang Mile Solar, Washtenaw Solar, Heartland Wind	Multiple	

Click on the relevant state's category and another window will appear:

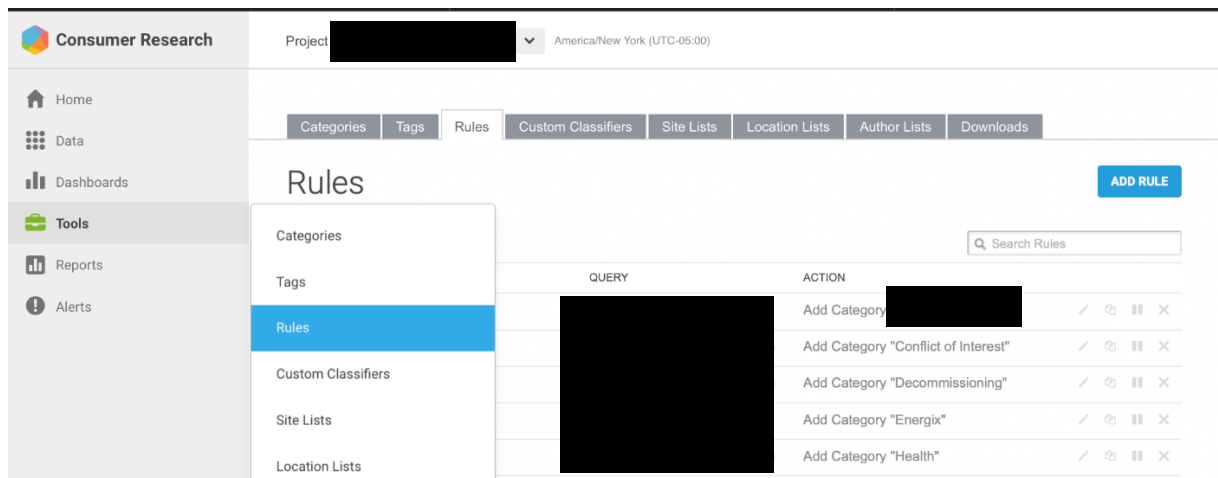


Just as before, scroll to the bottom of the subcategories list until you find an empty box.

Type in the name of the project and click the blue “Save Category” box.

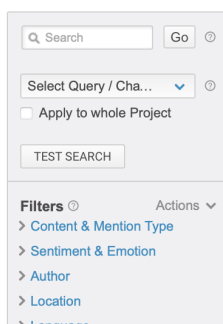
Adding Rules

Now that we’ve successfully added the categories, it's time to create the rules that will inform these categories. Navigate to the Rules section of Brandwatch.



Click on the blue “Add Rule” box in the top right and the following window will appear:

Create Rule - Settings



What is a Rule?

A Rule automatically applies an action like 'categorise' or 'tag' to any mentions that match the Filters you define here.

- 1 Pick one or more Queries
- 2 Put in a search term (optional)
- 3 Apply Filters (optional)
- 4 Test your search (repeat until happy)

In the first search box, copy-paste the query you wrote for the specific project.

Then click the dropdown menu that says “Select Query/Channel” and select the “**[REDACTED]** Projects Monitor” query

When you click “Go”, a preview of the relevant content should appear to the right.

Click on the blue “Next” button in the bottom right and you will proceed to the next screen:

Edit Rule "IPM - **[REDACTED]** - Action

What should happen with mentions for this search?

Action: Add Category ▾

Main Category

[REDACTED]

Select which Subcategory should be applied

<input checked="" type="checkbox"/>	[REDACTED] (adding this)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

< Next >

Click on the “Main Category” dropdown menu and select the “**[REDACTED]** Projects Monitor”.

Then, a checklist of the subcategories contained within the selected category. Scroll down and check off **both** the project name and the relevant state name. Click next again to proceed to the next page.

Edit Rule "IPM - Badger Hollow Solar" - Name and Scope

Name your Rule

IPM [REDACTED]

Please select which mentions should be affected by this Rule

☐ Apply Rule to **future** mentions **only**

This Rule will apply to mentions that will be found from now on.

☒ Apply Rule to **future and past** mentions

This Rule will apply to future and historical mentions back to 1 Dec 2018. For large data volumes this may take several minutes. We'll email you when it's ready.

Please reach out to your Account Contact to access historical data prior to 1 Dec 2018.

This Rule may change existing markup when applied to past mentions. ⓘ

< Next >

Name the rule "IPM - PROJECT NAME" and select the second option: "Apply Rule to **future and past** mentions." Click next to proceed to the last window.

Confirm Changes to Rule Setup

Name

IPM - [REDACTED]

Data Source

[REDACTED]

Search String

[REDACTED]

Action

Add Categories: Wisconsin [REDACTED]

Scope

The Rule will apply to all **future and past** mentions (back to 1 Dec 2018)

< Save Rule

Review the Rule information to ensure it is named properly, pulling from the "[REDACTED] projects Monitor" query, has the correct query, is being added to the state and project name subcategories, and is set to apply to all future and past mentions. Then click the blue "Save Rule" button in the bottom left.

Now you've created and coded the Rule that informs subcategory for your project under the [REDACTED] Projects Monitor Category. Now you need to create 1 more rule. For this, follow all the same steps as before. Once you reach the second page:

Edit Rule "IPM2 - [REDACTED] - Action

What should happen with mentions for this search?

Action: [Add Category](#) ▼

Main Category

IPM - Wisconsin



Select which Subcategory should be applied



+ [New Subcategory](#)



Next >

Click the "Main Category" dropdown method and select "IPM - STATE" where STATE is the name of the state the project is in.

Then check the project name.

Follow the rest of the steps from above, ensuring to select the "Apply Rule to **future and past** mentions" option on the next page. Then save the rule.

Adding to the Dashboard

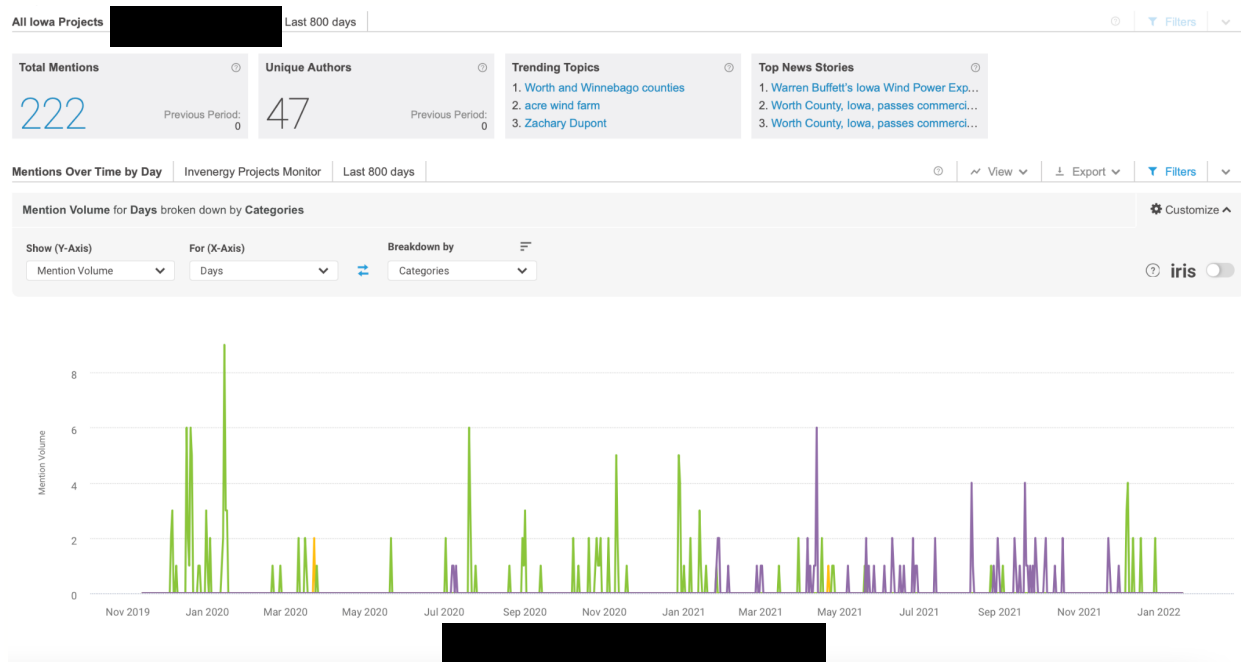
Dashboard Layout

Now that the query, categories, and rules are updated, the last step is putting it all into the dashboard.

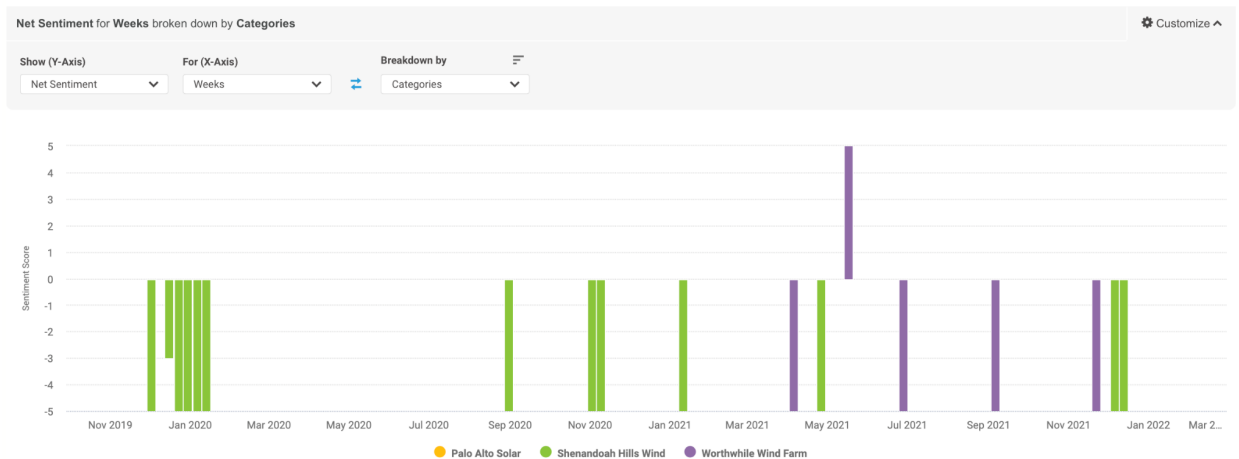
We will first go over the organization of modules and then how to add them to the dashboard.

The dashboard state tabs are broken up into 2 segments: state-wide and project-specific. The first few modules display state-wide data, while the remaining give insights into individual projects.

The first two modules are Key Insights and Mentions Over Time. Key Insights summarizes total mentions, unique authors, trending topics, and top news stories for the state. The Mentions Over Time plot a line graph for each project in the state that shows their mentions per day for the last two years.

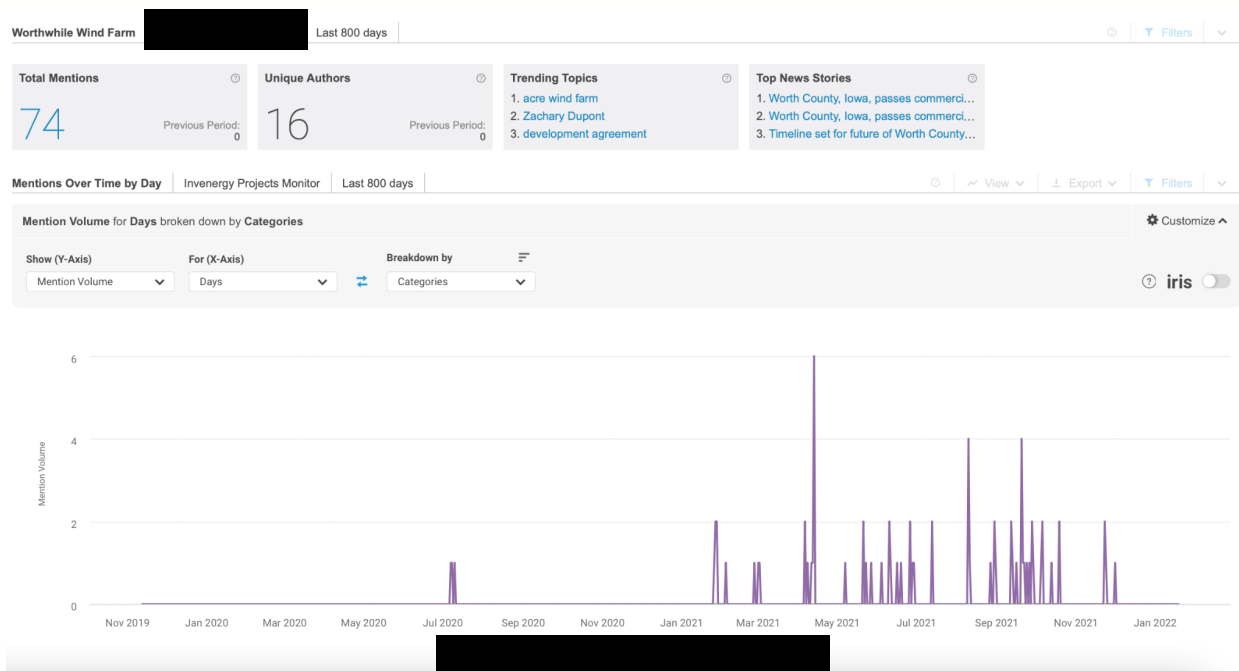


The last chart for the state-wide data shows any significant sentiment jumps that happened over a week for each project over the last two years.



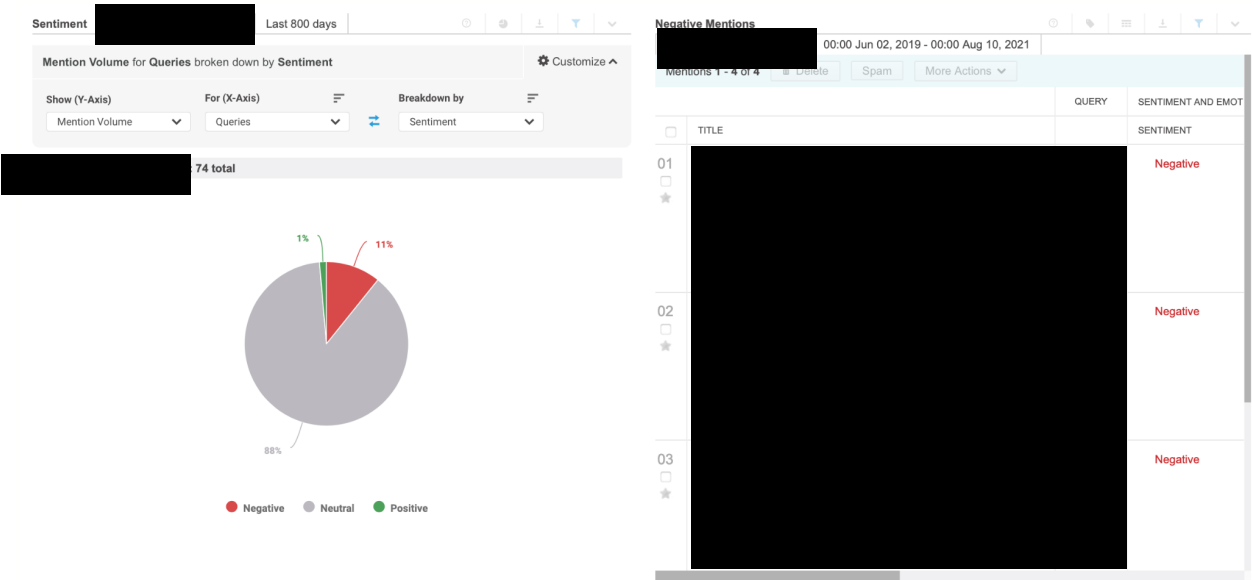
Next, come the project-specific visualizations. Each project has four modules: Key Insights, Mentions Over Time, Sentiment, and Mentions.

The first two are the same as the Key Insight and Mentions Over Time used for the state-wide data, just only using data for that specific project.

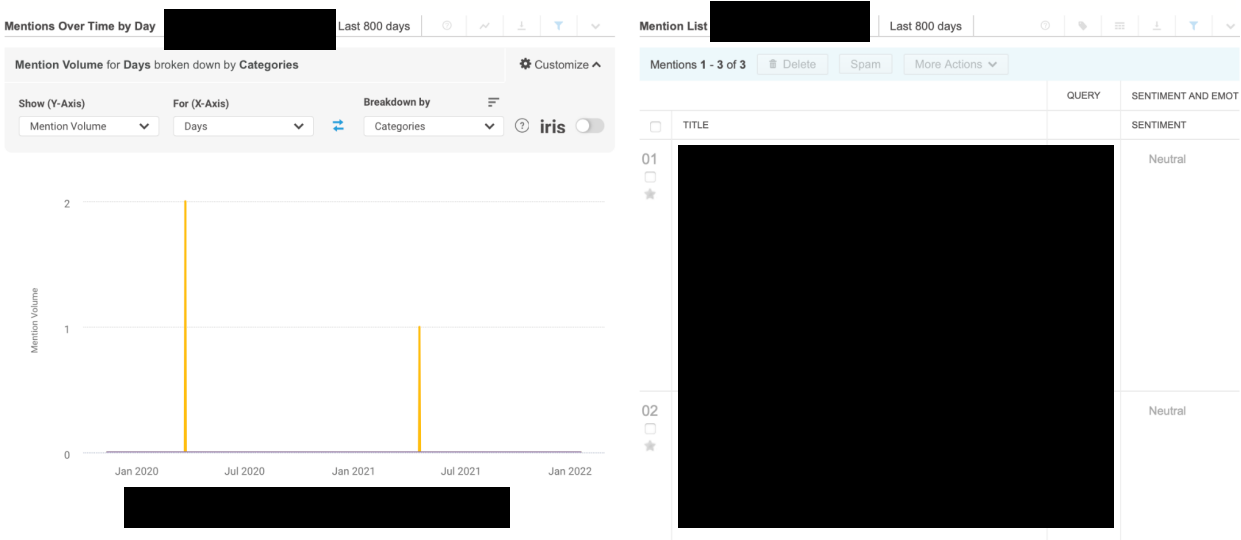


The next module is a Sentiment pie chart which shows what proportion of posts about the project are positive, neutral, or negative on the subject. This is then paired with a Mentions module that shows the mentions of the dominant sentiment. For example, the screenshot below

shows a sentiment pie chart where significantly more posts are negative than positive, so the Mentions module next to it shows the negative sentiment posts.



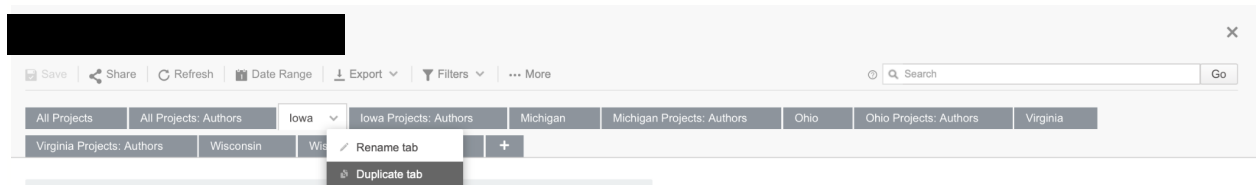
In some cases, the sentiment pie chart will be overwhelmingly neutral and not give any insight into a positive or negative trend in mentions. In these cases, I recommend just putting a Mentions module next to the Mentions Over Time module to give a snapshot of the conversation.



Adding Tabs

Now that we've gone over the general layout for the State tabs, let's get into how to add projects and states. You can find a supplementary video explanation at this link. An added note to **always save** regularly and before leaving the site. The save button can be seen in the top left underneath the first letter of the dashboard title. It has a little SD card as an icon.

If you're adding a new state, select one of the state tabs and click the arrow on the right of the box. Select "Duplicate Tab," and a copy of the tab should appear named "Copy of STATE"



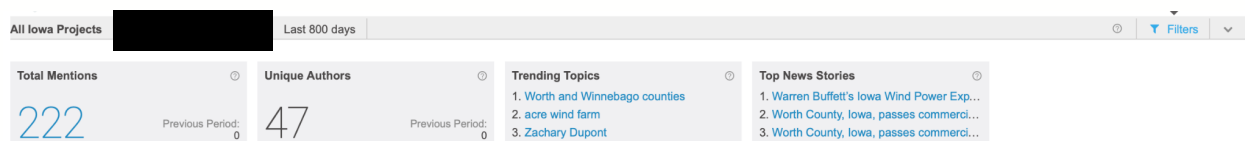
Double click the tab to rename it to whatever the new state name is, then click the blue "Rename" button.

Modules

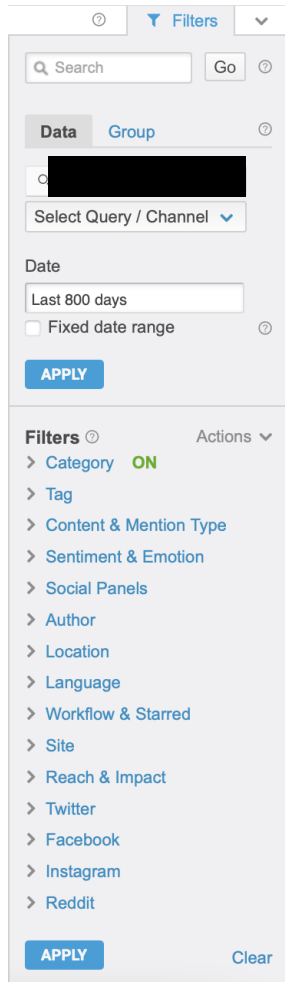
Changing Module Filters

After adding a tab via the copy-paste method there are going to be several modules copied over from the original tab displaying the data from that state tab. In this section, we are going to go over how to change the filters on modules so they display the relevant state and project data.

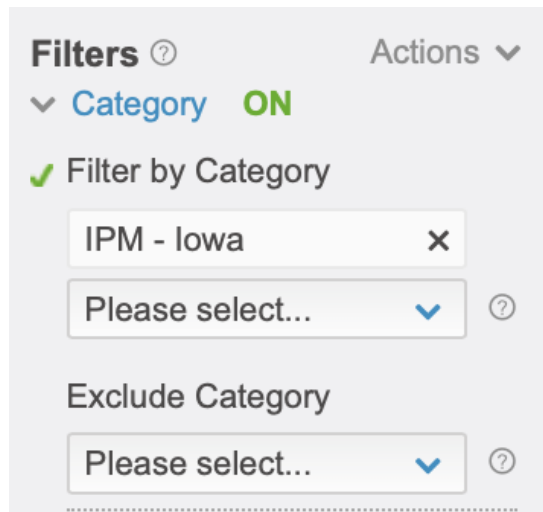
Every module has, in the top right, a little icon that looks like a funnel followed by the label "Filters."



These allow you to sort the data used in the module to a specific category, timeframe, sentiment, etc. For our purposes, we will be using them to apply the categories you've generated to filter the data down to the specific state or project. When you click on this "Filters" button, a window will drop down.



Click on the “Category” dropdown to get this options window:



Under “Filter by Category” there is a dropdown menu where you can select an existing category to filter the data by.

If this is for a state-wide visualization, select the relevant “IPM - STATE” category and ensure all the

subcategories are checked off. Then click the blue “Set as Filter” button in the bottom left of the window and the “Apply” button found in the bottom left of the larger “Filters” window.

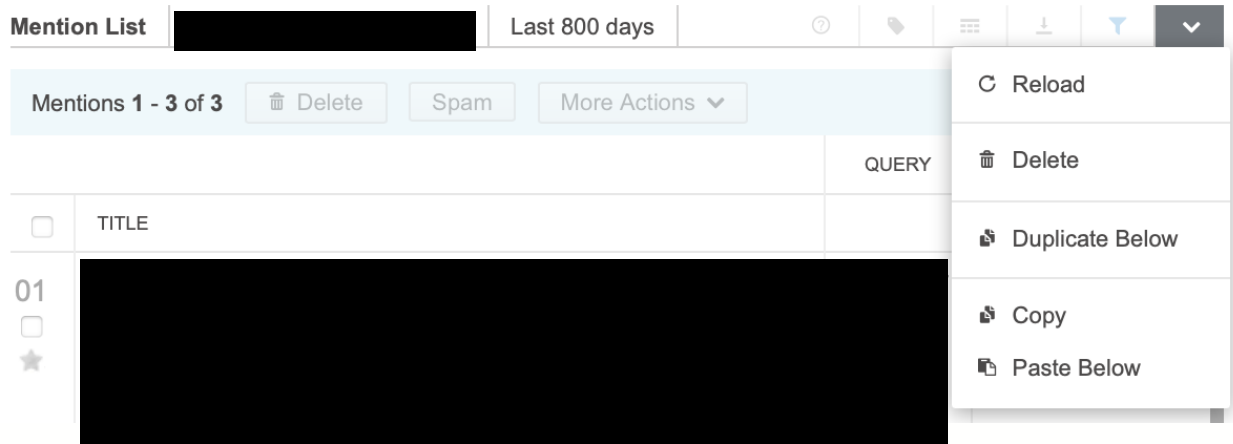
If this is for a project-specific visualization, select the relevant “IPM - STATE” category and only check off the box associated with the specific project you want to visualize data for. Then click the blue “Set as Filter” button in the bottom left of the window.

Now that you know how to manipulate modules, you may want to add a new type of module or remove an existing one. The next two sections go over how to add and delete modules to give you more freedom in editing dashboards.

Adding Modules

Copy-Paste Method

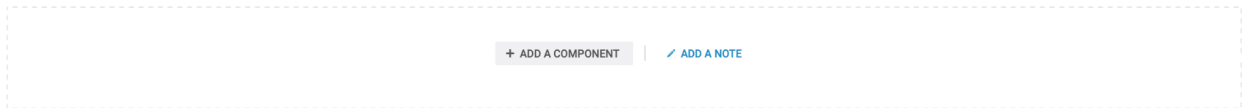
If you want to add new modules I recommend clicking the dropdown arrow in the top right of a pre-existing module of the same type and selecting “Copy”.



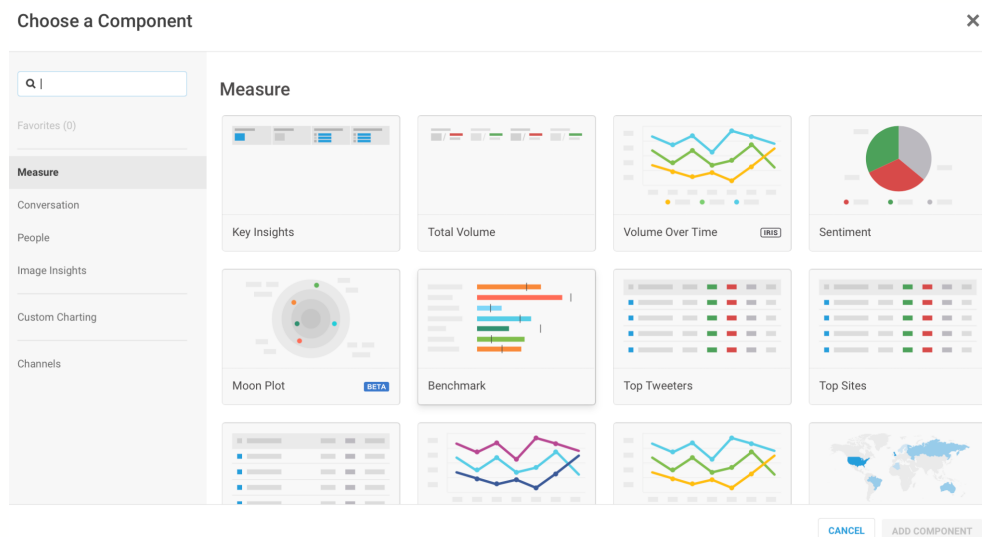
You can then select “Paste Below” and a copy of this module will appear below it that you can change the filter on and use. You can relocate any module via drag-and-drop by clicking and holding the top bar.

Manual Method

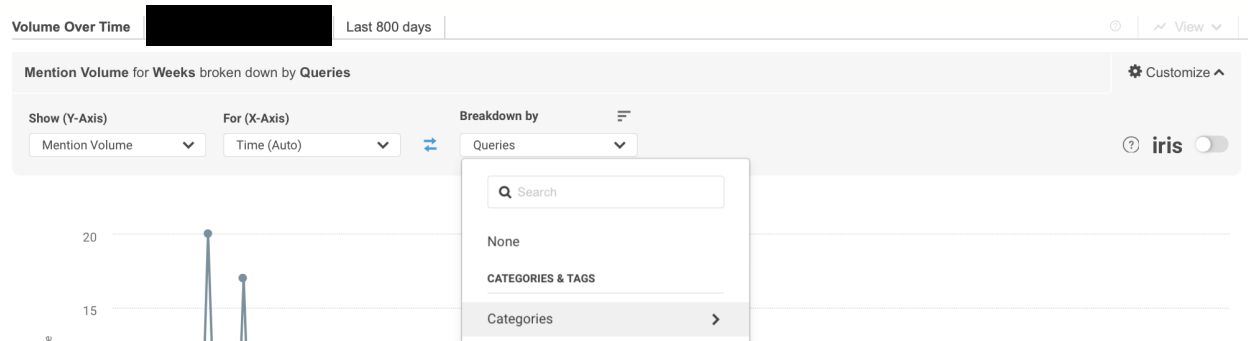
Alternatively, you could add a module by scrolling to the very bottom of the page until you see the “Add A Component” button.



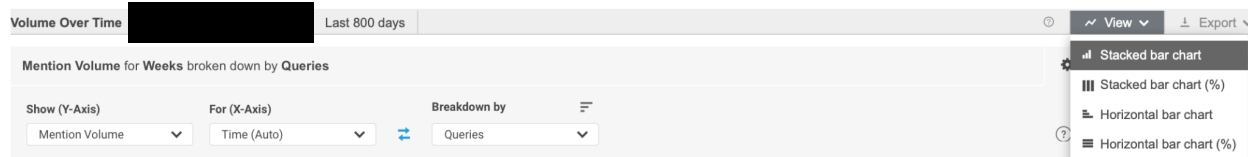
This will pull up the following window where you can select a module to add. The modules mentioned in this document are labeled in this window as Key Insights, Volume Over Time, Sentiment, and Mentions List.



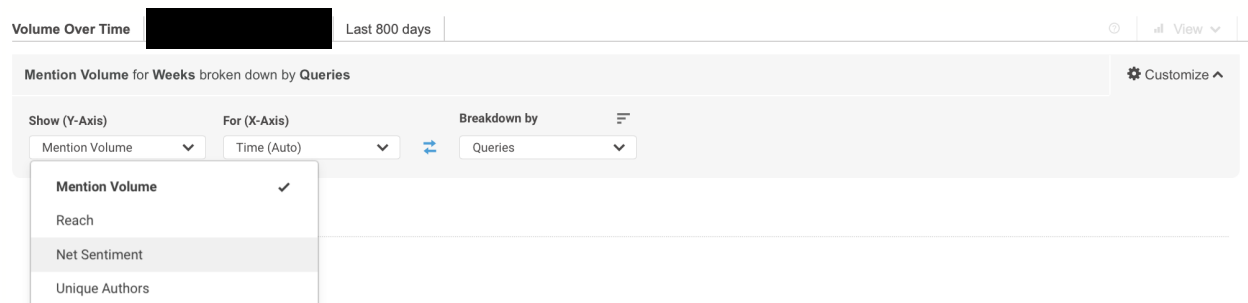
An important note is that when you generate a Volume Over Time module, it will just show the total mentions for the project. Be sure to select the “Breakdown by” dropdown menu and select Categories instead of Queries.



To create a new Net Sentiment module this way, select the Volume Over Time and breakdown by Categories. In the top right near the “Filters” button is “View.” Click on it and select “Stacked Bar Chart.”

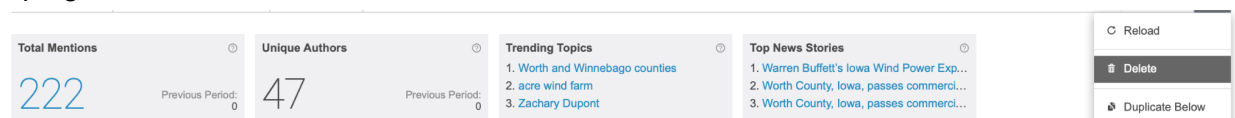


In the top right where it says “Show (Y-Axis)” click the dropdown menu and select “Net Sentiment.”



Deleting Modules

If you use the copy tab method, there may be more modules than you need or you may not like how a module turned out. If you want to delete a module, simply click the dropdown arrow in the top right and select “Delete.”

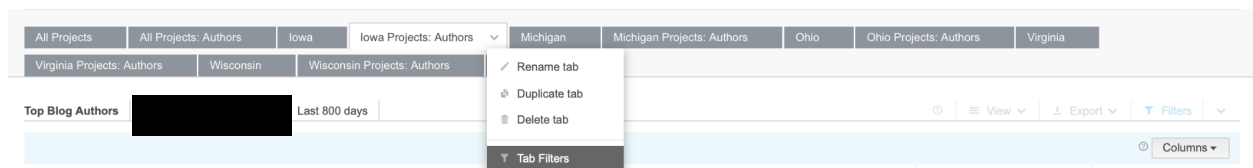


Setting Up Authors Tab

If you're adding a new state you can use the same tab copy-paste method to copy over another Authors tab and double click to rename it. The Authors tab layout doesn't change across different states or vary by the number of projects in each state so you don't need to do any layout or module changes if you don't want to.

But you still need to set filters. Because this one tab covers the entire state, you don't need a different filter for each module. I recommend setting a tab-level filter that will then apply to every module contained within the tab.

To do this, click the dropdown arrow on the right of the tab label and select "Tab Filters."



The same filter window you are familiar with will appear. Simply choose to filter by category and select the relevant "IPM - STATE" category. Click the blue "Apply" button in the bottom right and refresh the dashboard.