5 Initiatives

Within Spredfast, an initiative is a project or effort around which social media events are built. Initiatives can be used to group accounts, limit user access to sections of the application, or segment reporting to align with specific social media efforts. Examples of initiatives could be a product launch, an education campaign, or customer care.

Create an Initiative

To add an initiative to the system:

1. Click in the **Initiative Selector**, to display the list of current initiatives.
2. At the bottom of the column (list), click ***Add Initiative***.
3. In the **Name** field, type a name.
4. In the **Description** field, briefly explain the purpose of the initiative.
5. Click ***Create***.

Once the basic framework for the initiative is in place, go through the Initiative Settings tabs (described in "Initiative Settings," on page 75) to complete configuration.

Initiative Settings

Most of the selections made in the **Initiative Settings** screens apply to only to this initiative, not company-wide. Use these screens to:

- Add users to the initiative. (**Users**)
- Create Accounts and Account sets? (**?VOICES AND ACCOUNTS?**)
- Integrate the system with your current web analytics service. (**Web Analytics**)
- Configure link tagging. (**Link Tagging**)
- Use your company's bitly account for link shortening. (**Link Shortenting**)
- Configure integration with the opinion monitor. (**Crimson Hexagon**)
- Add names (or lists) of individuals in your audience whose engagement with the initiative you particularly want to follow. (**Influencers**)

- Select an Approval Team for each voice in the initiative, and implement Writer Review Teams. (**Approval Setup**)
- Identify keywords to help monitor topical trends in your social network. (**Keywords**)
- Assign a value, in points or currency, to engagement responses for actions taken in the initiative, such as $2.00 for a comment on a blog post. (**Values**)
- Restrict users to specific targeting profiles when creating Facebook microblog messages. (**Targeting Profiles**)
- Manage the association of Twitter streams with authenticated Twitter accounts (**Twitter-Based Streams**)

To access the Initiative Settings tabs:

1. Click in the **Initiative Selector** panel.
2. Click ??SHOULD HAVE TOOLTIP ROLLOVER SAYING INITIATIVE SETTINGS? ***Initiative Settings*** (gear icon). The Initiative Settings tabs appear.

Users

Before users can work in the Initiative, they must be assigned to it.

If you need to add the user to the Company (if he doesn't exist in the **Available Users** list yet) click ***Add User***, which brings you to the Add User function for the Company. If the user has been created, but has not yet been sent an invitation, click ***Pending Invitations*** to send it.

To learn more about adding new users, refer to the User Guide.

To read more about adding new users, see "Users," on page 36.

To assign a current user to the initiative, drag the user's name from the Available Users column to the Assigned Users column. To remove a user from the initiative, drag the name back to the Available Users column. Click the + icon to see the user's profile. You can use the Add All or Delete All functions if appropriate.

To assign a user to the initiative:

1. From the **Initiative Selector** panel, click ***Initiative Settings*** (gear icon).
2. Click ***Users***,
3. Drag the user's name from the **Available Users** column to the **Assigned Users** column. To remove a user from the initiative, drag the name back to the **Available Users** column. Click the chevron icon next to a name to see the user's profile.

Individual users can also be assigned to an initiative using the ***My Company***>***Users*** tab> **Add User** and **Edit User** dialogs.

Voices Accounts? and Account Sets?

??NEED SOME PM GUIDANCE ON THIS__WHY ACCOUNTS MUST LIVE IN ACCOUNT SETS, AVATARS, ETC. Within Spredfast, the term "Voice" has two meanings. It's both a collection of social media accounts (Twitter, Facebook and the like) that you use to communicate with your audience, and also a persona used to do that communication. A voice can be associated with a department within your organization (such as a "Sales" voice or a "Corporate" voice), or it can be associated with a character used in an overall media campaign (such as Priceline's "Negotiator").

A voice:

- Includes one or more social media accounts
- Can have a "persona" or character, including a name and profile image, through which an organization or division speaks
- Is associated with one or more users of Spredfast, who have permission to publish content using the voice
- Is associated with one or more initiatives
- Can use an approval team to ensure that only approved content is published through the voice

To create a new voice, click ***Add*** in the upper right hand corner of the page.

Click on the help icon on the **Add Voices** page for instructions.

Add Voices (Authentication)

In the **Add Voices** page, click ***Create New Voice***. Provide a name (and, optionally, a description and thumbnail image, which appears in the Calendar when the voice is used to publish).

Add ***Accounts*** to the voice. Select the social network from the drop-down list and click ***Authenticate***. Follow the login/authentication process for the social network so that the voice will be able to publish content to it. In most cases, only the user name and password must be provided.

NOTE **Record your Username and Password**

Most social media services use open authentication, which means that Spredfast receives a token granting permission to publish through those accounts. Consequently, Spredfast developers have no access to your usernames or passwords, because they are not stored anywhere in our databases.

Most Social Channels use token-based authentication (Open Authentication, or OA); Wordpress and SlideShare do not.

The Auto Import feature, available on most accounts, allows you to automatically import content published natively on a social media account into Spredfast. For example, messages you post directly on Twitter or Facebook are treated as though they were published through Spredfast, so that they are tracked and measured.

For Twitter (non-restricted accounts only), Slideshare??, and YouTube, Spredfast imports all photos, tweets, blog posts, presentations, and videos posted by the authenticated account.

For LinkedIn, auto-import is supported for Companies and Users, all items published by the account are imported. Auto-import is not supported for LinkedIn Groups.

For Facebook, Spredfast auto-imports microblogs, Unpublished Page Posts (‘dark’ posts), photo albums, videos, and blog posts (“Notes”).

NOTE **Auto-Import of Facebook Comments**

If an account configured for auto-import posts a comment on Facebook that appears in the account’s newsfeed, the comment is imported to Spredfast as a microblog message. Similarly, if a comment made elsewhere in Facebook is made into a story by Facebook, it is imported as a microblog message. Otherwise, Facebook comments are not auto-imported.

NOTE **Facebook Albums are imported as Updates**

Unlike Facebook Notes, Events, and Videos, Facebook Albums are auto-imported as Facebook Updates (microblogs).

For Google+, Spredfast auto-imports posts (microblogs) and comments posted by the authenticated account.

Google+ personal accounts. If customers have Google+ personal accounts enabled in the Admin Panel, (see "Google+ Personal Enabled," on page 9) Spredfast users can authenticate those accounts. For authenticated personal accounts, Spredfast auto-imports posts, displays them on the Calendar, and collects metrics for them, which are aggregated with the other Google+ (Company page) data. No publishing to personal accounts is supported, and streams cannot be created in the Inbox.

For Weibo, Spredfast auto-imports natively published microblogs (Weibos), comments, replies, and reposts??RENAME REPOST?.

For Instagram, Spredfast auto-imports natively published photos and videos.

To use this feature, click the ***Auto Import*** checkbox on the account, which appears on the **Voices and Accounts** page after the account has been created.

NOTE **Credentials**

We recommend that you do not configure auto-import on credentials used to publish through Spredfast.

NOTE **Click Metrics for Links Not Shortened by Spredfast**

Spredfast obtains click data from bitly on links that are embedded in published items, whether they were published through Spredfast or auto-imported. When Spredfast publishes a link, by default it automatically shortens the link and embeds special tracking code that associates the link with the published message, so that clicks on the link can be attributed to that specific post.

If a bitly link has not been shortened by Spredfast, that tracking code is not present. This is the case for auto-imported content, and for links on which the ***Shorten on publish*** setting has been deselected during publishing. In those situations, the click count provided by bitly includes clicks taken on the link when it appeared in the message, as well as all other clicks that have been made on the link, at any time in its history, from any location. Consequently, the click counts shown on links that were not shortened through Spredfast can appear to be unusually high.

For example, say a user created a link on bitly for google.com. The link provided by bitly already has a high click count. If the user published a post containing that link natively on Facebook, and the message was auto-imported into Spredfast, the data shown in the click count includes all the clicks that the link had ever received, not just the links it had received as part of the posted Facebook message. Consequently, the “click” value shown by Spredfast may be inflated.

If ***Shorten on Publish*** has been deselected for a link, and no other tracking mechanism (such as bitly) has been used on the link, Spredfast is unable to provide click counts and click metrics will show zero.

When deauthentication occurs, the account is marked inactive. While marked as inactive, Spredfast still attempts to send/track messages for the account (in case the deauthentication was in error) but may be unable to.

NOTE **Deauthentication Process**

Here’s how deauthentication discovery and notification is managed within Spredfast:

1. Spredfast receives an error from the channel that is categorized as an authentication error.
2. If the error comes from Facebook or Twitter, Spredfast performs a check to see if we still have access to the account. If so, we recognize that the account has not been deauthenticated, and no further action is taken. If we do not have access to the account, we consider the authentication error as valid.
3. After five deauthentication failures (authentication error messages) in a 12-hour period, on any channel, we send a message to the company owner and Support.

One common cause of deauthentication of an account by a social channel (especially Facebook) is a change to the user name or password associated with the account. When we discover an account has been deauthenticated, an email is sent to the company owner and to Support, and the account appears in red in the Voices and Accounts page and affected Inbox streams. To re-enable use of the account, click the ***Re-authenticate*** button to go to the re-authentication page for the channel. Once you have re-authorized the account, Spredfast uses the updated credentials company-wide.

NOTE **Re-authentication of Facebook and LinkedIn Groups**

If the re-authenticating user is a member of a Facebook or LinkedIn Group, the credentials will only be updated if the user has authenticated (or re-authenticated) for the group account previously. This is to keep author attribution for Group posts consistent when credentials are updated.

Enable Spredfast users to publish content through the voice. In the **Grant People Access To This Voice** section, click ***Users***. Use the + and **-** icons to add users to or remove them from the voice. Click ***Save***, then click ***Add Voice***.

Once a voice has been created, it can be assigned to one or more initiatives. Click ***Assign Voices***, and use the + icon to add a voice to the initiative.

You may want to use approval teams for a voice, so that content is reviewed and approved by a designated series of users prior to publication. To create an approval team, go to ***My Company***>***Approval Team***.

To assign an approval team to a voice, go to an **Initiative**, then click ***Initative Settings***>***Approval Setup***.

Edit Voices and Accounts

Once a voice has been created, you can change the name, description, thumbnail (avatar), and the users who have access to the voice

To edit an existing Voice:

1 From within an initiative, click the ***Access Voices*** (microphone) icon.

2 From within the voice, click the ***Edit Details*** (pen icon).

3 Provide new text in the Name and/or Description fields.

4 To add or replace the Thumbnail (avatar), click ***Browse*** and select an image.

5 Click ***Save***.

6 To change the users who have access to the voice (can publish using it), click the ***Users*** icon.

(You can also add a user to a Voice in the ***My Company***>***Users*** tab> **Add User** or **Edit User** dialogs.)

7 Use the **+** and **-** icons to add or remove users from the voice.

8 Click ***Save***.

Facebook

You can authenticate on Facebook using a business account (giving access to a Business page) or through a personal account (giving access to groups the account is in, pages the account is administrator of, and the account holder's wall).

Log in using your email and password. When you set up authentication, you must agree to give access (Allow Access) to all Accounts associated with that identity in Facebook, but you can modify the settings later by designating which accounts you want to access for each voice.

Brands that have multiple Facebook pages using the same account name can identify them easily in Spredfast. If you have assigned a Username for your Facebook Page account, that name is displayed in parentheses in most places the account name appears, so long as the username and account name are not identical. (If the account name and username are the same, both are displayed on the **Voices and Accounts** page only.) The Facebook account name on the **Voices and Accounts** page is a hyperlink to the page on Facebook, so that you can quickly verify that you're working with the correct account

When a Facebook user re-authenticates a Facebook account in Spredfast, the system examines all voices in the company to see if that user is the admin for any of the other pages, profiles or groups, that were authenticated under the current app. If so, Spredfast automatically re-authenticates for those other accounts as well.

To authenticate accounts for Facebook Content Promotion, see "Content Promotion," on page 72.

Google+

You can authenticate only Google+ Company pages—no personal user accounts are supported. Log in with your personal account and select pages for which you are an owner or manager to authenticate.

Google+ personal accounts. If customers have Google+ personal accounts enabled in the Admin Panel, (see "Google+ Personal Enabled," on page 9) Spredfast users can authenticate those accounts. For authenticated personal accounts, Spredfast auto-imports posts, displays them on the Calendar, and collects metrics for them, which are aggregated with the other Google+ (Company page) data. No publishing to personal accounts is supported, and streams cannot be created in the Inbox.

LinkedIn

Authenticate on LinkedIn using a personal profile. As part of configuration, you identify which groups and/or companies associated with the profile should be accessible from Spredfast. To authenticate a LinkedIn company in Spredfast, the account holder must be a company page admin in LinkedIn.

Weibo

Authenticate on Weibo using a valid account.

Twitter

A “restricted” Twitter account is one that has been authenticated in Spredfast for the sole purpose of assignment to Twitter search-based and Twitter Users streams. These accounts cannot be used for publishing or for responding to stream items in the Inbox, you cannot use them to create account-based Twitter streams, and no metrics data is collected for them. You cannot auto-import data for a restricted Twitter account. Restricted Twitter accounts help provide capacity to include more Twitter streams in the Inbox.

NOTE **“Restricted” Setting Applies per Voice**

A Twitter account can be restricted in one Voice, but non-restricted in a different Voice.

Q Can I switch an account from non-restricted to restricted?

A Yes, but be aware that:

- If there are account-based streams already associated with the account, you must delete the streams before switching; you cannot use restricted Twitter accounts for account-based streams.
- Metrics data that was collected for messages published using this account prior to the change won’t be deleted, but no additional data will be collected after the change is made.
- Any messages that have already been scheduled to publish using the account will fail to publish. Before you change the account, you should go to the ***Calendar*** screen, and use the ***Advanced*** filter to find any messages scheduled to publish using the account, and change them to use to a different account.

Q Can I switch an account from restricted to non-restricted?

A Yes. When you change an account from restricted to non-restricted, you can use the account to publish Tweets and respond to items in the Inbox, and create account-based streams. Metrics data will be collected. You can also continue to use the account for Twitter Users and Twitter search-based streams.

YouTube

If you want to use Spredfast to comment on your account’s YouTube videos, you must link your YouTube and Google+ accounts (natively), then reauthenticate your YouTube account in Spredfast.

Blog Services 7 WORDPRESS ONLY?

When authenticating blog services in Spredfast, you may need to provide the access point (or end point) in the URL field for the blog to authenticate properly. For Wordpress, the access point is: http://YOURSITE/PATH/TO/xmlrpc.php

Brandwatch

Authenticate on Brandwatch using an email address and password. If an email address is associated with more than one company, user will automatically be authenticated for all of the companies. Auto-import is not supported for Brandwatch items.

NOTE **Multiple Brandwatch Companies**

Spredfast does not currently (as of 5.1 release) recommend creating streams for multiple Brandwatch accounts/Companies within the same initiative.

Instagram

If you are currently logged in to Instagram when you authenticate, the Voices page refreshes and the account is added without having to provide credentials. If you are not logged in, the Instagram log-in screen appears; enter credentials to authenticate the account in Spredfast. Auto-import is supported for videos and photos.

Web Analytics

Integrate the web analytics package you use to monitor website traffic, so that you can take full advantage of the link tagging capabilities of Spredfast.

By tagging the links you embed in your social media messages, and integrating with your web analytics engine, you can track the visitors to your website all the way from the individual tweet or post that brought them there.

Currently, Spredfast supports integration with Google Analytics and Omniture. To integrate your account, click the button for the appropriate service, then provide the requested authentication data. You may need to speak to your IT department to get specific API key information for Omniture.

Table 5-1 Google Analytics Tags Compared to Omniture Tags

Google Analytics	Omniture
Recognizes five tag variables to pass values to its analytics engine.	Uses a single variable that, depending on the client implementation, may pass any number of values for gathering and reporting metadata.
Requires four tags in the URL for GA to pass information back to Spredfast	Requires all values declared in the variable to be present for proper parsing.
Requires that each of the five tags adhere to a simple syntax.	The syntax for the variable and its values may vary for each client implementation.

Table 5-2 Google Analytics Link Tags

Link Tag	Usage Suggested by Google	Implementation in Spredfast
*utm_medium	Method of link delivery (postcard, email, banner ad, etc.).	utm_medium=Spredfast Establishes that all content generated in Spredfast can be traced back to Spredfast.
*utm_content	For testing and content-targeted ads.	utm_content=ID of post Specifies the system-generated, unique identifier for the post. (The unique ID relates the post to an account, action, event, schedule, and content labels.)
utm_source	Where the link originates. Examples: name of email list, banner ad location (citysearch, yellow pages, and so on), or pay-per-click service.	utm_source=[Channel] Lists the media channel carrying the content and link (Facebook, Twitter, etc.).
utm_campaign	To identify a specific product promotion or strategic campaign	utm_campaign=Initiative Name Carries the name of the initiative associated with the content.
utm_term	Identifies paid keywords (like shoes, monitors, etc.).	Optional. Can be used as a custom tag.

CAUTION **Metrics Tags**

Do not change the variables utm_medium and utm_content. These tags and their stated values are required for the system to calculate metrics.

Once the account integration process is complete, click ***Enable Link Tracking***.

You can also edit or remove account integration using the ***Edit*** and ***Remove*** buttons.

Link Tagging

General link tracking is configured when you integrate your Google Analytics or Omniture accounts in Spredfast. Use these **Link Tagging** screens to create custom link tags for special purposes, or to integrate with Coremetrics or other analysis software. You should be familiar with the general terms and concepts of link tagging before creating custom tags. For assistance with custom link tag creation, contact Support.

Tag Templates

Create a Tag Template before creating specific tags.

To create a tag template:

1 From ***Intiative Settings***>***Link Tagging***, click ***Add Template***.

2 In the **Add Tag Template** screen, complete the following:

- **Name**: Name for the template.
- **Variable**: The variable supported by your service that you want to use, such as utp_campaign or utm_term.
- **Value**: Leave this field blank; it will be populated later when you assign values to the tag.
- In the **Variable Parameters** section, ***Separator*** menu: According to the syntax used by your analytics service, select the character that acts as a value separator.

3 If you need to add a parameter, click ***Add Parameter***. In the **Add Parameter** screen, provide:

a. **Name**: A name for the parameter.

b. **Values**: Select from:

- **Static List**: If you want to define a specific list of values, provide list items, separated by commas.
- **Auto from channel**: If you want to use different values based on social site, enter them here.
- **Auto from voice**: If you want to use different values based on the voice used to publish the activity, identify them here.
- **Auto from account**: If you want to use different values based on the account associated with the initiative, enter them here.
- **Unique ID**: If you want the system to assign a unique value to each post that contains the link.

c. Click ***Save***.

Tags

Create a tag template before creating tags.

See "Tag Templates," on page 84.

To create a custom link tag:

1 From ***Initiative Settings***>***Link Tagging***> select ***Add Tags***.

2 In the ***Type*** menu, choose either Standard or a saved Tag Template.

3 Depending on the template type, select the value parameter.

4 If you want to use this tag consistently in your links, click ***Use by default***, and the tag appears as the “selected” tag when you choose tags to apply to a link.

5 Click ***Add Tag***.

The following example provided by Support, for a client that wanted to use the same tag every time for a particular initiative.

To add a CMP tag:

1 From ***Settings***>***Link Tagging***>**Tags**, click ***Add***.

2 In the **Name** field, select Standard.

3 In the **Variable** field, enter `CMP`.

4 In the **Value** field, enter `101AR&ct=101AR12W&cr=stgso-cial&csr=power&cm=h&ccy=us&cpb=stg&S_TACT=101AR12W*`

5 Click ***Use by default***.

6 Click ***Save***.

Domains to Tag

Automatically ask users if they want to append a tag whenever activity is posted to the domains listed in this section, such as all your business domains.

To identify domains for which users are asked if they want to add a tag:

1 From ***Initiative Settings***>***Link Tagging***, select ***Add Domain***.

2 Enter the URL. It doesn’t have to be well-formed; you can use example.com instead of http://www.example.com.

3 Click ***Add Domain***.

Import Tags

Import custom tags created in another initiative.

To import custom tags from another initiative:

1 From ***Initiative Settings***>***Link Tagging***> ***Import Tags***.

2 Select the initiative from which to import tags.

3 If the selected (source) initiative uses tag templates that include voices as variables, provide variables for this initiative’s voices.?

4 Click ***Import***.

Link Shortening

By default, Spredfast uses its bitly account to shorten the links embedded in social media content. If your organization prefers to use its own bitly account, authenticate it here and Spredfast will use it both to shorten your links and to report click-through metrics on auto-imported content. Each initiative can have one account associated with it.

To add a custom bitly account for link shortening:

1. From ***Initiative Settings***, click ***Link Shortening***.
2. Click ***Authenticate Bitly Account.***
3. ??BROKEN ON QA !% PRESENTLY..

NOTE **Click Metrics for Links Not Shortened by Spredfast**

Spredfast obtains click data from bitly on links that are embedded in published items, whether they were published through Spredfast or auto-imported. When Spredfast publishes a link, by default it automatically shortens the link and embeds special tracking code that associates the link with the published message, so that clicks on the link can be attributed to that specific post.

If a bitly link has not been shortened by Spredfast, that tracking code is not present. This is the case for auto-imported content, and for links on which the ***Shorten on publish*** setting has been deselected during publishing. In those situations, the click count provided by bitly includes clicks taken on the link when it appeared in the message, as well as all other clicks that have been made on the link, at any time in its history, from any location. Consequently, the click counts shown on links that were not shortened through Spredfast can appear to be unusually high.

For example, say a user created a link on bitly for google.com. The link provided by bitly already has a high click count. If the user published a post containing that link natively on Facebook, and the message was auto-imported into Spredfast, the data shown in the click count includes all the clicks that the link had ever received, not just the links it had received as part of the posted Facebook message. Consequently, the “click” value shown by Spredfast may be inflated.

If ***Shorten on Publish*** has been deselected for a link, and no other tracking mechanism (such as bitly) has been used on the link, Spredfast is unable to provide click counts and click metrics will show zero.

Bitly uses OAuth to authenticate accounts. If bitly cannot be accessed during publishing, Spredfast publishes the long URL instead. In this case, click metrics cannot be collected on the message.

Crimson Hexagon--NOT ON QA15

Enabling of Crimson Hexagon requires changes to the.ini file managed by development; it is not managed in the Admin Panel. Contact DEV.

Before Crimson Hexagon data can appear in Spredfast, the integration must be enabled by Support. Once your company has been configured to work with Crimson Hexagon you must provide an account (Username/Password) in this screen. Then, you can:

- Display streams containing Crimson Hexagon monitors in the Inbox.

  See "Account-Based Streams," on page 104.

- Send relevant items to a Crimson Hexagon category from the Inbox using ***Add Content Label***. When you assign an item to a category, the item is provided to Crimson Hexagon, where it can be used to improve the algorithms used by that software. The category is also used as a content label in Spredfast; it appears with CH: before the label text.

  See "Labels," on page 64.

- See Crimson Hexagon metrics in the Detailed Analytics view (grid). From ***Analytics***>***Detailed Analytics*** view, scroll to the **Opinion Monitor** section. (Note that when Crimson Hexagon is enabled in Spredfast, the **Sentiment** label in Detailed Analytics changes to **Opinion Monitor**.)
- Access your Crimson Hexagon Dashboard from the Analytics page (from ***Analytics***>***Detailed Analytics*** (drop-down menu)>***Crimson Hexagon***).
- See Crimson Hexagon metrics in the Sentiment view. (From ***Analytics***>***Detailed Analytics*** (drop-down menu)>***Sentiment***.)

Influencers

“Influencers” are individuals whose social media activities are particularly important for you to monitor; their actions impact your business objectives for the Initiative. Each company develops its own criteria for determining who is an “influencer,” and the criteria can be different for each initiative.

If you have a list of influencers, you can upload it into the system using a simple CSV file, or you can upload a CSV generated by Traacker. If you choose to create your own CSV, it must contain these two column headings: **Service**, and **User Identifier**, in which Service is the name of the social media channel and User Identifier is the unique value for the individual. A sample CSV can be downloaded from the application, edited, and re-imported.

The following services and identifiers are supported:

- Twitter: user ID, user name, or profile URL
- Facebook: user ID or profile URL
- Flickr: user ID or user name.

You can export the current influencer list from the system. The file includes the service and identifier data, as well as any additional information displayed in the social profile. This file can also be re-imported.

Approval Setup--STILL IN DEV

To configure approvals for outgoing content, you need to understand approval teams, writer approval teams, and approval paths.

Approval Teams

Approval teams identify a sequence of reviewers that examine and approve content before it is published. For example, your legal department might need to review all content that comes from the “Corporate” voice.

On the ***Initiative Settings***>***Approval Setup*** screen, you select which approval team, if any, to use for each voice within this initiative (or for all activity, regardless of voice). If you have the correct privileges, you can configure approval teams in ***My Company***>***Approvals***.

If you can see an approval team but cannot select it, it means that no members of the approval team have been added to this Initiative. Add users to the initiative in the ***Initiative Settings***>***Users*** screen, or in the ***My Company***>***Users*** tab> **Edit User** dialog. You can see which users have been assigned to an approval team by accessing ***My Company*** > ***Approval Teams***.

Writer Approval Team

When enabled, the Writer Approval Team feature ensures that when content is written by a user in the writer role, a notification email is sent to members of the Writer Approval Team indicating that there is content that needs attention. This review occurs *prior* to the regular review sequence for the voice and initiative in which the content was created. Unlike the other approval teams, which are configured at the Company level, Writer Approval Teams are created at the Initiative level.

NOTE **Using Writer Approval Teams**

A writer approval team is required in order for content written by writers to be submitted for approval, thus entering the publishing queue. If a writer approval team is not used, then content written by writers remains in a “Ready for review” state, no email notifications are sent to editors, and reviewers must seek out the content to submit it for publishing.

TIP **Using filters if there is no Writer Approval Team**

If you’re not using a writer approval team, you might want to create a “Ready for Review” state filter in the Agenda Calendar to make sure that content doesn’t get overlooked. (***Calendar***>***Filter***>***Action status***>***Ready for review***).

The notification email is sent to all users on the Writer Approval Team. However, each team member can choose whether or not to receive these email notifications in the ***My Account***>***Email Subscriptions*** field.

To use a writer approval team, click ***Enable Writer Approval Team***. In the dialog that appears, add reviewers to the team by clicking the + icon.

To add a writer approval team:

1. Select ***Initiative Settings***>***Approval Setup***.
2. Click ***Enable Writer Approval Team***.
3. In the dialog that appears, add reviewers to the team by clicking the + icon.

Keywords--STILL IN DEV

Use initiative keywords to monitor trends in your content streams. Initiative keywords are intended to be relatively short-lived; for example, you might want to create keywords around a new product or advertisement. The system monitors all Inbox streams for appearances of the keyword, and presents the results in the keyword-related panels on the **Initiative Dashboard**. Note that the Dashboard panels are organized into **First Five**, **Second Five**, and **Last Five**. These refer to the order in which the keyword entries are displayed on this configuration screen: the first five fields, second five fields, and last five fields.

To add initiative keywords: In a blank keyword field, enter a term, phrase, or series of terms you want to monitor. You can use the same simple or advanced search syntax as is available when creating search streams. To reorder the keyword fields, drag and drop them within the **Keywords** screen. Click **Save**.

Values

Assign a specific value, using points or currency, to the various engagement responses that a published item receives (such as Facebook likes, Twitter retweets, or clicks on an embedded link). As your content is published and your audience interacts with it, the value generated by publishing activity is tracked. Monitor your most valuable content using the **Initiative Explorer**, and find cumulative data in the **Value** section of the **Detailed Analytics** page. ??VALUE INFORMATION ALSO PROVIDED IN MESSAGE DETAILS?

Points are integers (no decimals), and if you decide to change an initiative from currency to a points system, one currency unit (such as 1 dollar) will equal 100 points for conversion purposes.

Value settings must be in place (have already been configured) at the time the engagement occurs in order to be credited; Value cannot be assigned retroactively. If value amounts are changed over the life of the initiative, the amount that was in place at the time the engagement occurred is applied.

Table 5-3 Value Metrics

Metric	Description
All Bit.ly Clicks	Value amount is credited each time a bitly link is clicked on from any content published via spredfast and/or auto-imported. If this metric is chosen, it preempts all the channel-specific value metrics. For example, if both the All bitly Clicks metric and the Twitter Click metrics have values set on them, and someone clicks a link in a tweet, the value is added to All Bit.ly Clicks, not Twitter Clicks.
Blog Clicks	Value amount is credited each time a link embedded in a Wordpress blog is clicked.
Blog Comments	Value amount is credited each time a person comments on a Wordpress post published via Spredfast or auto-imported.
Facebook Clicks	Value amount is credited each time a link embedded in a Facebook item is clicked.
Facebook Comments (and Replies)	Value amount is credited each time a person comments on any Facebook item or replies to a Facebook comment, either published by Spredfast or auto-imported.
Facebook Likes	Value amount is credited each time a person likes any Facebook item, either published by Spredfast or auto-imported.
Google+ +1s	Value amount is credited each time a person clicks +1 on a Google+ item, either published by Spredfast or auto-imported.
Google+ Clicks	Value amount is credited each time a link embedded in a Google+ item is clicked.
Google+ Comments	Value amount is credited each time a person comments on a Google+ post or comment, either published by Spredfast or auto-imported.
Google+ Reshares	Value amount is credited each time a person reshares a Google+ post, published by Spredfast or auto-imported.
LinkedIn Clicks	Value amount is credited each time a link embedded in a LinkedIn item is clicked.
LinkedIn Comments	Value amount is credited each time a person comments on a LinkedIn item.
LinkedIn Likes	Value amount is credited each time a person likes a LinkedIn item published by Spredfast or auto-imported.
Slideshare Comments	Value amount is credited each time a person comments on a Slideshare presentation that was published via Spredfast or auto-imported.

Table 5-3 Value Metrics

Metric	Description
Slideshare Downloads	Value amount is credited each time a person downloads a Slide-share presentation that was published via Spredfast or auto-imported.
Slideshare Favorites	Value amount is credited each time a person marks a Slideshare presentation that was published or auto-imported by Spredfast as a “Favorite.”
Twitter Clicks	Value amount is credited each time a link embedded in a Tweet is clicked.
Twitter Favorites	Value amount is credited each time a person Favorites a Tweet.
Twitter Editable Retweets	Value amount is credited each time a person uses the RT@twitter_user method of retweeting content either from the Twitter platform or via Spredfast.
Twitter Native Retweets	Value amount is credited each time a person retweets using the native Twitter retweet function,
Twitter Replies	Value amount is credited each time a person replies to a Tweet.
YouTube Comments	Value amount is credited each time a person comments on a YouTube video that was published by Spredfast or auto-imported.
YouTube Dislikes	Value amount is credited each time a person Dislikes a YouTube video that was published by Spredfast or auto-imported. To take away value for Dislikes, you can set the value to a negative number, such as -25 points.
YouTube Favorites	Value amount is credited each time a person marks a YouTube video that was published via Spredfast or auto-imported as a “Favorite.”
YouTube Likes	Value amount is credited each time a person likes a YouTube video that was published by Spredfast or auto-imported.
YouTube Video Responses	Value amount is credited each time a person posts a video in response to a video.

To assign a value to a type of engagment:

1. Select ***Initiative Settings***>***Values***.
2. Select the unit (currency or points) in which value is calculated, using the drop-down menu. Only one unit is allowed.
3. Click ***New Value***.
4. From the ***Metric*** drop-down menu, select an engagement type.
5. In the **Value** field, enter the amount each engagement response is worth (such as 3 for 3 points, or 5.00 for five dollars).

6 Click ***Add Value***.

Repeat for each engagement response type you want to track. You can change or delete a value type using the ***Edit*** and ***Delete*** buttons on each entry.

Targeting Profiles

Create Facebook Targeting Profiles (Gated and Enhanced), and restrict users so that they can publish only to specified profiles.

Enhanced targeting: The post appears in targeted fans' news feeds; everyone can see the post in the page's Timeline. **Gated targeting**: The post appears in targeted fans' news feeds, and appears on the page's Timeline only to targeted fans.

For more information about Gated and Enhanced targets, and adding Facebook targets when creating a message, refer to the User Guide.

For more about Gated and Enhanced targets, and adding Facebook targets when creating messages, see "Facebook Page Post Targeting," on page 106.

Targeting profiles allow you to save commonly used targeting configurations. Targeting profiles are created and managed at the initiative level, but you can use profiles that have been created in another initiative—all you have to do is copy them from the initiative in which they were created into your initiative. When profiles are created, the system checks to make sure the name of profile hasn't been used already, but doesn't check to make sure the content isn't the same in multiple profiles. Once you create a profile, you can specify users that will be restricted ("constrained") to it.

By default, a user has no restrictions ("No constraints") until an admin limits her profile usage. A non-constrained user can choose any defined targeting profile, or no targeting profile, when creating a Facebook message. If the user has been restricted to just one profile, that profile is ***automatically applied*** when the user selects a Facebook page account. If the user has been restricted to a set of profiles, only those profiles appear as options on the Targeting menu??STILL MENU POST 7? during message creation, and the user must select one of them. **If the user has been restricted to one or more profiles, the user cannot publish to the page *without* using a profile.** If a user has no constraints (but is not an admin), she can add her own targeting to a message when creating it, but cannot save the target as a profile for others to use. Only users with Edit Initiative ??STILL POST 7permission can create and save targeting profiles.

Editing or deleting a profile (or changing the users that are restricted to it) has no effect on existing messages; the messages will use the profile definitions (and restrictions) that were in place when it was created. This is because the message retains the characteristics of the profile (location, language, gender, etc.), rather than the association with the profile itself, when it is put on the agenda.

To create a targeting profile:

1. Select ***Initiative Settings***>***Targeting Profiles***.
2. From the drop-down menu, select ***Facebook Profiles***.
3. Click ***Create Profile***.
4. Click ***Define New Targeting Profile***.
5. In the **Profile Name** field, provide a name for the profile.
6. Using the menu, select a type (Gated targeting or Enhanced targeting).
7. In the **Location** field, start typing the name of a country; Spredfast will auto-complete the location using ones available in Facebook. Click on the country to add it.

   You can further specify states/provinces, or cities to target, or leave the target set to Everyone.
8. In the **Languages** field, start typing the name of a language; Spredfast will auto-complete the language using ones available in Facebook. Click on the language to select it.
9. In the **Age** field, select a range or specific age.
10. In the **Gender** field, select a gender.
11. If you want to specify more criteria, click ***Advanced Targeting options***.
12. In the **Interested in** field, select Men, Women, or All.
13. In the **Relationship status** field, select a status.
14. In the **Education** field, select a level. If College is selected, you can choose specific schools; begin to type a school name in the field; the field auto completes. You can also specify major and graduation year(s).
15. In the **Workplace** field, begin to type a company name. If the company is known to Facebook, it auto-completes. ??NOT WORKING QA13
16. Click ***Save***.

To copy a profile from another initiative:

1. Select ***Initiative Settings***>***Targeting Profiles***.
2. From the drop-down menu, select ***Facebook Profiles***.
3. Click ***Create Profile***.
4. In the ***Copy From Another Initiative*** menu, choose the Initiative you want to copy from.
5. From the list of profiles, use the **+** icon to select the ones you want to add to your Initiative.
6. Click ***Save***.

To restrict users to one or more profiles.

1. Select ***Initiative Settings***>***Targeting Profiles***.
2. From the drop-down menu, select ***User ??Should be plural "Users"?***. A list of all users associated with the initiative appears
3. Find the user, and click ***Add Profile***.
4. In the **Add Profile Constraint** dialog, use the **+** icon to choose Targeting Profiles the user can publish to.
5. Click ***Save***. The profile restrictions appear in the **Targeting Profiles** column for the user.
6. To remove a restriction from a user, click ***Add Profile*** and remove the profile from the list of selected profiles.

Twitter-Based Streams

Each Twitter search-based and Twitter Users stream must be associated with an authenticated Twitter account. Streams are associated with a Twitter account when they are created in the Inbox. There are limits to the number of streams allowed for each account, and you can change the account with which a stream is associated.

See "Twitter Admin Settings," on page 31.

The ***Twitter-based streams*** tab shows the allocation of accounts to Twitter streams **within the initiative**. If an account has not been assigned to any streams in the initiative, it appears twice in the table (once for each stream type) with "No assigned stream" shown in the **Stream** column.

If you want to limit the number of streams an account can have of each type to a number **less than the configured maximum**, you can "lock" the account, so that no new streams of that type can be added to it. For example, if you have three search-based streams associated with an account, and the maximum permitted is six, you could "lock" the account at three, so that no more search-based streams could be added to the account. You could still add Twitter Users streams to the account; **locks are applied per stream type**.

To re-assign a stream to a Twitter account:

1. From ***Initiative Settings***, click ***Twitter-based Streams*** tab.
2. Find the stream you want to change, and click the checkbox.
3. In the ***Change account*** drop-down, select a different account.

NOTE Stream Counts Displayed in the Selector

When you use the ***Change Account*** drop-down, the list of available accounts shows the number of streams currently assigned to the account *company-wide*, not for the initiative. That's why there may be a higher number shown in the dialog than the number of times the stream appears in the Twitter-based streams table, which is for the initiative.

To re-assign multiple streams to an account:

1. From ***Initiative Settings***, click ***Twitter-based Streams*** tab.
2. Click the checkbox to the left of each stream you want to change.
3. Click the down arrow at the top of the column heading, and select ***Change account***.
4. In the **Change account** dialog, select a new account from the drop-down menu.

To lock a Twitter account, so that no more streams of the same type can be added to it:

1. From ***Initiative Settings***, click ***Twitter-based Streams*** tab.
2. Find a stream associated with the account you want to lock.
3. Click the checkbox in the **Lock** column. All other streams of the same type associated with the account are automatically checked (and locked) as well.

Initiative Groups

Users can create "groups" of initiatives to which they have access; for example, a group of marketing initiatives or a group of sales initiatives. Once initiatives have been grouped, Spredfast provides aggregated metrics for the group in the **Detailed Analytics**, **Channel Effectiveness**, and **Sentiment** analytics views.

NOTE Deduping of Metrics for Initiative Groups

If an account is used for several voices across multiple grouped initiatives, credential metrics for the account are deduplicated; that is, credential data for the account (such as number of followers) is only counted once.

To create an initiative group:

1. From the **All Initiatives** screen, click ***Add Group***.
2. In the **Group Name** field, enter a name. The name must be unique.
3. Click the **+** icon to select initiatives to include in the group. You can search for initiatives using the search field at the top of the column.
4. Click ***Save***.

To see aggregated metrics for an initiative group:

1. From the **All Initiatives** screen, click the tab? for the initiative group.
2. Select ***Group Functions***>***Group Analytics***. A **Detailed Analytics** page including aggregated metrics for all grouped initiatives appears.

   Use the drop-down menu to change the view among Detailed Analytics, Channel Effectiveness, and Sentiment.