

Ruled Based Categorization QuickStart Guide 2023

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Guide for Superusers with Admin permission.

Introduction

This QuickStart Guide helps you automate the categorization of posts in Wide Narrow by using rule-based categorization.

The Rule-based categorization feature is an add-on feature available to Superuser Admins once a System Admin has turned the feature on. This feature aims to set rules to your taxonomy to create automatic tags for posts in Wide Narrow.



RULE BASED CATEGORIZATION

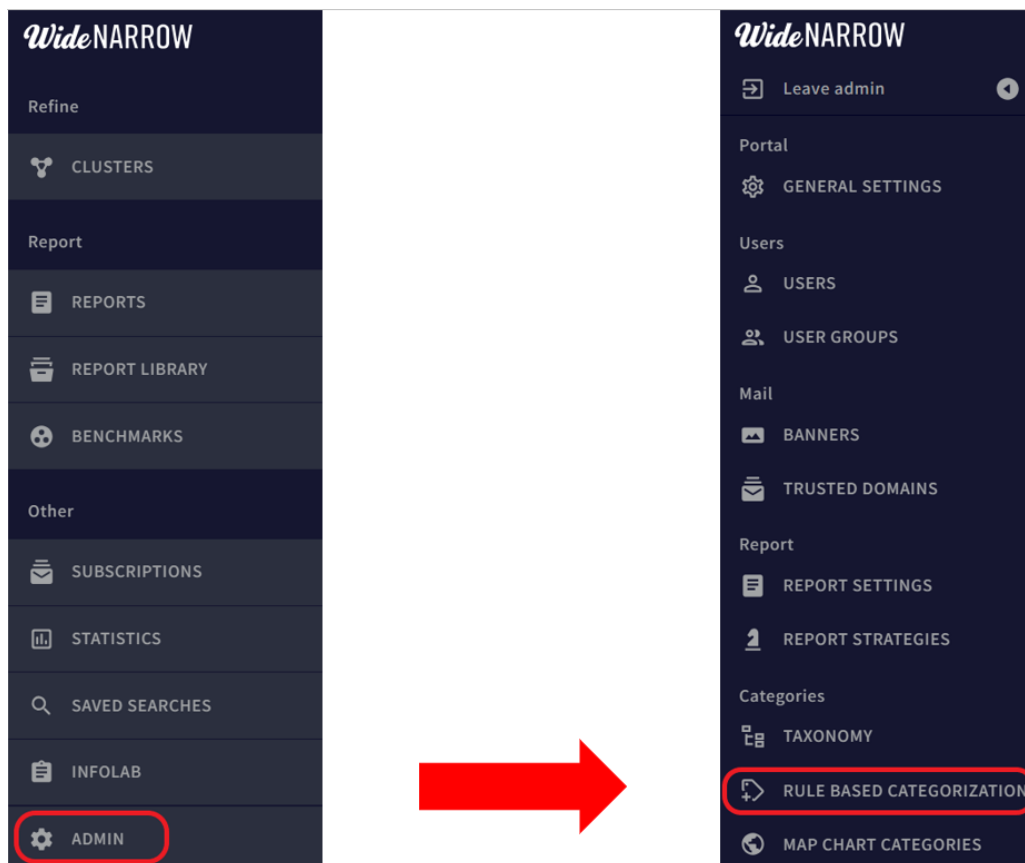
More Resources

Read more about **Rule-Based Categorization** in this Help Library [article](#).

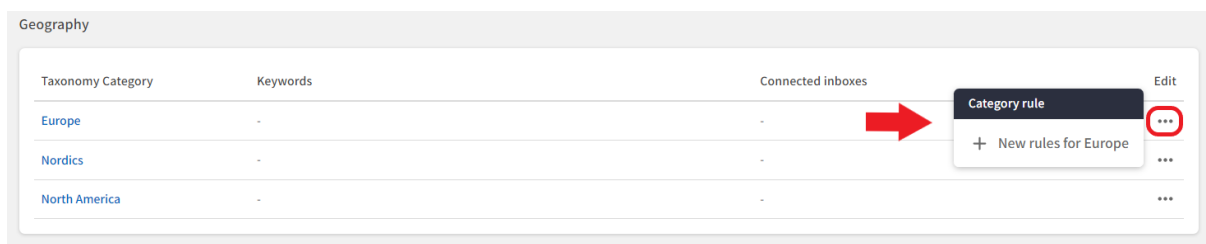
Read more about keywords and filters in this [Keyword Search Guide](#).

Create Rule Based Categories

To access this feature, go to the **ADMIN** section on WideNarrow and then click the **RULE-BASED CATEGORIZATION** tab in the black navigation bar.



Next, click on the **three dots** to the far right of the category to which you would like to add rule-based categorization, and select the **+ New rules for ...** category option.



Example:

Click the three dots to the far right of the category *Europe* and then select **New rules for Europe** to open the **Automatic categorization rules** form and add rule-based categories to the *Europe* category.

In the **Automatic categorization rules** form:

1. Enter the rules for the automatic categorization in the **KEYWORDS** field.
Read more about how to add keywords and keyword filters below.
2. **SELECT INBOXES** where you want to apply the categorization rules.
3. Click the **SAVE** button.

Automatic categorization rules for Communication ×

Creating rules for automatic categorization

In the keyword field below, please list the keywords that, when identified in posts, should trigger the automatic categorization and tag those posts with this category. The keywords could be synonyms and words related to the category. Separate the keywords with empty spaces.

Example: If you add "merger" and "acquisition" as keywords to the taxonomy category "M&A", all posts containing text with the words "merger" or "acquisition" will be automatically categorized with "M&A".

If you leave the keyword field empty, all incoming posts will be categorized with this category regardless of content.

Keywords **1.**

Select inboxes **2.**

Keywords that should trigger automatic categorization.
Note that leaving this field empty will categorize all incoming posts regardless of content.

The inbox(es) where this automatic categorization rule is applied.

New rule +

3.

[Find more instructions in this User Guide](#)

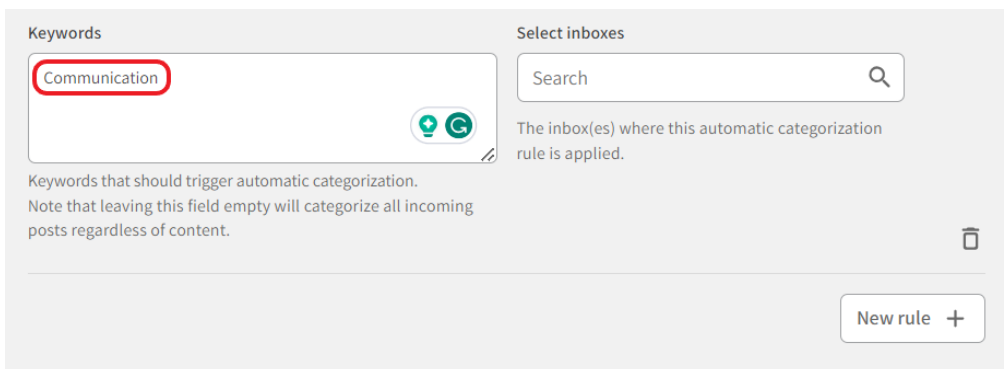
Cancel

Save

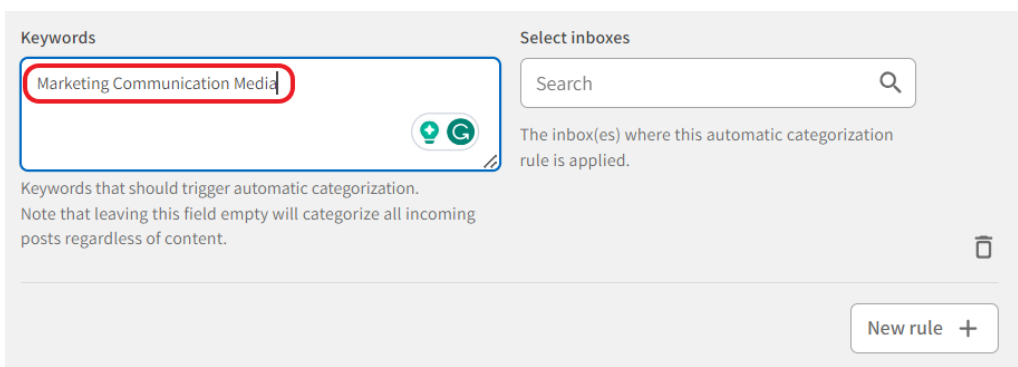
Adding Keywords in the Keywords field

Enter all keywords that should trigger the automatic tag of the category selected in the **KEYWORDS** field following the instructions under **Creating rules for automatic categorization**.

Example 1: If you choose the category *Communication* and would like to automatically categorize all posts that contain this word with the category *Communication*, you could simply enter the word *Communication* in the keyword field.



Example 2: If you choose the category *Communication* and would like to automatically categorize all posts that contain the keywords *Marketing*, *Communication*, or *Media* with the category *Communication*, you could simply enter *Marketing*, *Communication*, and *Media* in the keyword field. Separate the keywords with empty spaces.



Creating advanced Keyword filters Properly

Follow the instructions below for the keywords entered to auto-categorize properly:

Delimit with Title and Description

If you only enter the keyword, the rule-based categorization will apply to every aspect of the original article/post, including details outside the article that you may not want to include, such as related articles, references, and irrelevant metadata. To avoid this and to be more specific on where you want your keyword(s) to apply, you can specify if the system should only look for the keyword in the **title** or **description** of the article.

Following the **title** or **description**, use a colon and no space, and then enter your keywords or phrases as before.

Examples:

title:("consumer goods" OR FMCG)

title:FMCG

description:("consumer goods" OR FMCG)

description:FMCG

Quotation marks

You must use quotation marks if you are entering a phrase of two or more words.

Note that you must write the quotation marks straight ("...").

Use Notepad or a similar text editor to make the quotation marks straight.

Examples:

"New Jersey"

"hot chocolate"

AND - OR

Separate the keywords with a capitalized AND or OR when you want multiple keywords to apply in a specific way. You can find more details in the [Keyword Search Guide](#) in the Wide Narrow Help Library.

Boolean Operator - AND

If two keywords or phrases are connected by an AND, both must appear in the post title or description to be auto-categorized with the selected category. AND must be capitalized and can be used multiple times.

Examples:

"video games" AND teenagers

"social media" AND email AND "baby boomers"

Boolean Operator - OR

Use the Boolean Operator "OR" for words or phrases that mean exactly or nearly the same as another word or phrase. OR must be capitalized and can be used multiple times.

Examples:

car OR automobile

film OR movie

Asterisk (*)

Using an asterisk (*) at the end of a word triggers the auto-tagging of all endings of that word.

Example:

Crook* = crook, crooked, crooks, crookeder

Parentheses

Use parentheses when you need to separate groups of terms to specify your categorization rules.

The below example commands represent the word combination financ* and all possible endings where the * begins, AND the next group of words as an entire object, where the parentheses start and end. If the parentheses were not added to the second group of keywords, it would read them one after another in a long string instead of as a grouped command.

Example:

description:financ* AND (account* OR annual OR ARR OR assess* OR balance OR CAPEX OR capital OR cost* OR divest* OR dividend* OR gains OR "half-year" OR HY1 OR HY2 OR indicator* OR expend* OR expens* OR invest* OR liquidity OR losses OR period OR profit* OR Q1 OR Q2 OR Q3 OR Q4 OR quarter* OR rate OR rated OR rates OR rating* OR results OR report* OR reports* OR revenue* OR review* OR solidity OR solven* OR turnover OR year*)

Proximities:

The symbol ~# (where # is a number) will look for two keywords within the specified number of words of each other.

Examples:

This example will look for the keywords 'clean' and 'energy' within three words of each other:

title:("clean energy"~3)

This example will look for the keywords 'clean' and 'eating' within five words of each other:

description:("clean eating"~5)