

E-1 Appendix E – Use of Blog and Comment Software for Feedback

This is an appendix to the Final Report of the JISC-funded Scoping Study “Aggregations of Metadata about Images and Time-based Media”. The short (3-month) scoping study was undertaken as part of the Resource Discovery Programme during 2010, and the aim was to determine the feasibility, viability and value of creating an aggregation of metadata about images and time-based media (films and sounds).

The Final Report was developed using the WordPress¹ Blog software with the digress.it² plugin as a means to allow others to comment as described in “The Consultation Exercise” section of the Final Report.

The purpose of this appendix is to share experience with others considering use of a blog for feedback on a report; and to help other users who intend to use the WordPress Blog software with the digress.it plugin. EDINA had previous experience with WordPress Blog software, and so chose to host the blog to develop expertise with digress.it.

E-1.1 Process Used

The initial development of the final project report followed the standard project process: to write a draft report, share for internal comment and incorporate changes into a version for release. At that point, since the scoping activity was carried out over a short period of time and there were many different types of stakeholder with a diverse range of views, the report was made available on a dedicated blog to enable further comment and feedback from interested stakeholders. The project did not use social media from the outset as an engagement mechanism, which likely contributed to the lack of activity on the blog when the report was shared this way.

The process of making the report available on the blog was not straightforward, and most of the challenges encountered were technical; these are described in more detail in a separate section of this appendix.

An email was sent to all interview participants and those survey participants who shared their email address to thank them for their input and ask for any further comment or feedback via the blog. The project website was updated to include a link to the blog and a request for feedback. The blog was made available for 4 months for comment and feedback, however only 2 comments were received in this time. These were incorporated into the final version of the report made available in May 2011 as a pdf document.

A significant amount of effort was put into making the report available as a blog, and the limited number of comments received indicated that this was not used for comment and feedback by interested stakeholders as anticipated. This may be due to a number of reasons, for example the method used to create awareness may not have reached the target audience effectively, or that since commenting on blogs is considered to be a niche activity the target audience did not feel empowered to participate. Alternatively the use of digress.it could have confused some blog users as it has less usage than blog software in general. Furthermore submitting feedback in the public recorded space of a blog may be off-putting for some potential contributors. The subsequent effort needed to manage spam comments was also high.

From this experience it is concluded that the value gained from the comments could have been gathered by email for inclusion in an updated final report with significantly less effort than that of using the blog software. The number of potential comments was not known at the outset, and so the value of gathering feedback this way could not be determined in advance. If social media had been used as an engagement mechanism from the outset this may have encouraged more interaction and participation from the target audience.

¹ <http://wordpress.com/>

² <http://wordpress222.wordpress.com/2010/07/01/digress-it-2-3-2/>

E-1.2 Technical Challenges and Solutions

This section discusses several of the technical challenges that were encountered using the software and the solutions that were used to overcome these. A separate section describes the challenges related to writing posts using digress.it. Existing posts on community discussion forums provided solutions for the challenges wherever available, while other workarounds were developed by the project team.

E-1.2.1 Software Versions

The digress.it plugin version 2.3.2 requires WordPress software of version 3 or above. The EDINA WordPress software was running on version 2.8 and so required upgrading to version 3.0.1 to enable the digress.it plugin to be used.

The different versions of the digress.it plugin are named the same or similarly without a version number. It was only possible to determine the version by downloading and reviewing the associated notes or installing.

When WordPress is next upgraded it is not clear if the digress.it plugin will continue to work, therefore further work may be involved in future if the blog were to remain open for further comment.

E-1.2.2 Use of Pages and Posts

Initially the content was transcribed into several pages to reflect the different sections of the report. However, the comment functionality is not available on pages when using the digress.it plugin, so these were subsequently copied into posts to enable use of commenting.

The automatic Table of Contents is based on the titles of posts in date and time order, so to display the sections of the document in order for the Table of Contents it was necessary to either write the posts in order or retrospectively change the date the post was published (go to posts, mouse over the post that is in the wrong place and click on Quick Edit to change the date and time of the post). It was helpful to have the table of contents available while creating the posts to enable the display of the posts to mimic the ordering of the document.

The default functionality of digress.it was to display the most recent post as the home page, regardless of the post that was selected as the front page content in the digress.it option menu. This appeared to be functionality that was not working as expected, so a single page was created to describe the blog and set as the front page by assigning the page order 1, and in the digress.it options selecting 'Front Page Order' to be 'Ascending' and 'Front Page Content' to be 'Default'. In addition to displaying the Table of Contents using standard digress.it functionality, hyperlinks to the first section and executive summary were added to the page to enable subsequent navigation to the relevant posts.

E-1.2.3 Themes

The initial install of digress.it appeared to have a problem with use of themes so it was upgraded. This had unpredictable results in that the digress.it theme deactivated and was not available for selection in the appearance menu; however this was not noticed for some time as another theme was being used at that time. The solution was to deactivate the plugin and reactivate it, so that the theme was restored to the range for selection in the appearance menu and was automatically selected by default.

Some themes appear not to work with digress.it; the theme digress.it 2.3 by Eddie A. Tejada does work in that it allows the comment functionality to work.

For example, selecting the theme "Twenty Ten 1.1 by the WordPress team" appeared to work; an image could be uploaded, posts could be written and comments made on paragraphs within posts. However, it was not possible to subsequently see any comments that had been made, even for the author. As this was not realised for some time, additional notes on challenges using this theme are included in a separate section.

E-1.2.4 Theme Sidebar with Custom Menu

There is only one sidebar available to customise for the digress.it 2.3 theme. If a licence is to be put on the content the solution was to put a text box into the sidebar without a title, but with content for the licence. For example, for Creative Commons attribution licence with a link to the creative commons site put in the body of the text box: `CC:BY | EDINA, University of Edinburgh`

When a user selects any post the post is displayed and available for comment but the Table of Contents is no longer shown. To keep quick links for key report sections visible to users at all times a custom menu can be created on the right hand side using the sidebar. Create a custom menu using the menus option under Appearance and save it. Then go to Widgets, and add a Custom Menu to the sidebar, selecting the previously saved menu.

E-1.2.5 Spam Comments and Trackbacks

To avoid automatic display of spam comments the Discussion settings were configured so the following were checked: 'Comment author must fill out name and e-mail' and before a comment appears the 'Comment author must have a previously approved comment'.

This did not appear to reduce the amount of spam as spam comments were posted with email addresses that were related to the spam.

ReCaptcha was selected to reduce the amount of spam on public blogs for EDINA; the version installed was WP-recaptcha plugin version 2.9.8.2. This did considerably reduce the amount of spam comments that were received. However, ReCaptcha does not stop trackbacks, which were also posted.

Unfortunately the installation of ReCaptcha appeared to clash with the digress.it plugin, so that only those who had a login to the site could view the posts other than the home page. (For other public blogs using ReCaptcha that did not use the digress.it plugin there was no problem in viewing the site.) For those who had no login the home page would load correctly, but for all posts (using Internet Explorer) the status bar showed a yellow triangle and error message. Once this was clicked the browser reported that there was a coding error at a very high line number (in around line 650,000) which was inconsistent with the number of lines that appeared on screen. Using Firefox to browse the home page displayed correctly but any post flashed up the content, then showed as blank and appeared to hang while redirecting to Google with the text "Read google.com".

Since public users could no longer view the blog or comment ReCaptcha was disabled. The spam immediately returned and the Comment Blacklist functionality was used to automatically mark some comments as spam. This required a manual selection of each IP address and words that were likely to be included in spam comments but not valid comments, and each was copied to a spreadsheet that was then ordered and sorted. This was updated frequently with the resultant set copied into the Comment Blacklist section. For some IP addresses that were frequently recurring the initial part was also included as a separate line to prevent subsequent comments from that IP address range, e.g. '173.212.'. This gave a risk that some real comments may come from a valid IP address range and so a manual check had to be made of comments that were automatically marked as spam; no valid comments have been found to date.

Since the first spam comment was received on 29th November 2010 over 4,000 spam comments have been received, of which many were trackbacks. 2 valid comments were received in this time frame and 1 comment was posted by the authors in response.

E-1.2.6 Use of Theme "Twenty Ten 1.1 by the WordPress team"

This theme allows upload of a custom image, and to have one custom menu shown just below the image for simpler navigation. If this theme could have been used it would have avoided the need for the custom menu on the right hand side of the page.

There were a number of challenges in relation to the header image:

- When uploading it must not be a jpg; a png works OK.

- The free application for screen capture, jing, allows capture of any part of the screen and defaults to save the image as a png file. The free application for image manipulation, gimp, also allows manipulation of the size in pixels and to save as a png file.
- It was subsequently discovered that jpg files can be uploaded but often give an error message even when successfully uploaded. There is a default maximum file size of 1MB, which can be modified using the Super Admin account across all blogs for the WordPress instance.
- If using an image that is not the exact 940 x 198 pixels size, the theme tells you that it can be cropped on the next page to fit but this does not appear to work.
- To make an image of exactly 940 x 198 pixels use the jing capture screen, which gives the actual pixels in the top right of the screen capture area as the mouse is dragged to select the part of the screen.
- If the basic image is not big enough, paste it into PowerPoint, zoom in and then capture the zoomed version with the right number of pixels.

E-1.3 Writing Posts Using digress.it

This section describes the challenges that were encountered while writing posts using the digress.it plugin, and the solutions that were used. This is based on a final report that was written in Microsoft Word, and then copied to the blog. A sample of text giving examples of use of formatting that can be reused by others to check new versions of digress.it is also included.

E-1.3.1 Some Knowledge of HTML is Sometimes Useful

The WordPress software allows writing of posts without any special HTML knowledge, but there are certain idiosyncrasies of the digress.it plugin that mean understanding HTML can be useful to enable formatting to show as the author would like.

For example, when copying from Word with endnotes in the text at the end of the post, digress.it automatically inserts `<hr size="1" />`. This stops all links within pages to footnotes working and must be deleted. Manual updates must be made for footnote references to work; an example is included in the sample text.

However, there are also occasions when normal HTML coding appears to be ignored and does not display as the author would like. For example it is not possible to force the type of ordered list, it will always default to a numbered list i.e. `<ol type="i">` is ignored and the list is always displayed with numbers.

E-1.3.2 The Editor Menu

The following image shows the editor menu, with the switch between Visual and HTML mode found in the blue ellipse, full screen mode in the green circle, paste from Word in the black circle and insert an image in the orange ellipse.

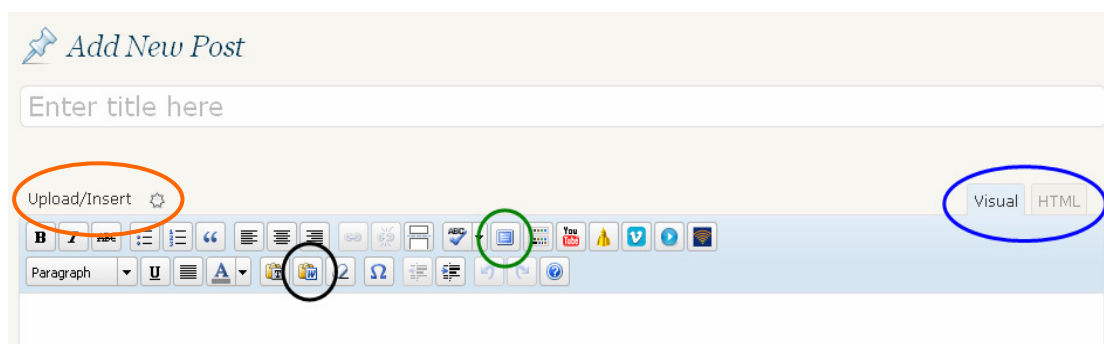


Figure E1: Image of the Editor Menu

E-1.3.3 Copying from MS Word

It was simple to initially use the visual editor in full screen mode to paste from Word and make initial changes to spacing. Then after closing full screen to switch to the HTML editor and select all and copy. Pasting the (now changed) html text into notepad allowed find and replace changes to be made, e.g. to numbering that is not copied properly, to paragraph spacing, and to put all the footnotes into one comment rather than have each one as a separate paragraph. Copying all and pasting back into the HTML editor then meant it could be saved and published.

E-1.3.4 Automatic Text Updates by digress.it

A number of normal text editing functions change unexpectedly, and sometimes do not work. Using an ampersand is automatically swapped for & by WordPress, which then inexplicably breaks formatting and display of some text for unordered lists later in the page. This was found when writing the Appendix A menu post, where the use of an “&” in one of the hyperlinks meant that 3 lines in a bulleted list at the end of the page were not shown at all. The solution was to change the “&” for the word “and” in the link, which was not ideal.

E-1.3.5 Including Images

Images of the format jpeg or jpg will not upload into the Media Library; instead use png or gif.

Initially it was found that including an image in a post requires first uploading the image to the media library and saving. It is then straightforward to copy the file URL (e.g. http://mass.blogs.edina.ac.uk/files/2010/09/Figure_2_Approach.png) and switch to the html view when creating the post. Click on the img button, and past the URL into the box, then type a description of the image for the alternative text into the next box and click OK – the text inserted will look something like this:

```

```

It was also found that images did not often display in the right proportions, so adding the text `width="100%" height="100%"` into the image tag solved this, for example:

```

```

It was subsequently discovered that a plugin could be used to upload images without the need to first upload to the media library. Figure E1 shows the grey sun image in the orange ellipse that enables this. Similarly inserting images should not require HTML usage but use of the same link. Once an image is included in the Visual Editor then selecting it will also allow an edit of the display size.

E-1.3.6 Endnotes

A large amount of the text included in the final report had endnotes included in the Word document, which were to appear as footnotes in the blog. These did not function properly when clicked and updates had to be made to the html to enable the footnote reference to link to the footnote and vice versa. The following example solution was found to work:

Reference within page: `[i]`

Reference at end of page: `[i]`

If footnotes had been used in Word rather than endnotes then this may have worked more effectively when copying text.

E-1.3.7 Unexpected Table Formatting Error

A two-column table that displayed as expected stopped displaying fully when the following text was added as a footnote:

```
http://www.britishmuseum.org/research/search_the_collection_database/search_object_detail_s.aspx?objectid=117631&partid=1&searchText=rosetta+stone&numpages=10&orig=%2fresearch%2fsearch_the_collection_database.aspx&currentPage=1
```

It is not clear why this was, but is thought to be related to the “&” in the URL. This was solved by using bit.ly to generate a short URL instead (<http://bit.ly/br567O>) and the table then displayed again as expected.

E-1.3.8 Sample Text

The following text was developed to understand what displayed using digress.it and what did not. This may be reused by others by copying the text below into a new post (private) and pasting into the HTML editor, not the visual editor.

This is the first paragraph.

```
<a name="_testbacktotop" href="#_testdeeplink">And testing the link to the bottom of the page</a>
```

This is the second paragraph, which is still part of the same paragraph for comments, even though there is a br / tag at the end of the previous line.

This is the third paragraph, which doesn't have p marks, and so probably shouldn't go across the whole post.

So if there is a double return in the html page, then it's interpreted as a new paragraph. There is also an extra line space in the published page (only sometimes, can't work out exactly when), which doesn't look as good.

Now using html paragraph marks for the sample text:

This is the first paragraph.

This is the second paragraph.

```
<p style="text-align: justify;">This is the third paragraph, which actually has p marks, and since this is justified it should go across the whole post.</p>
```

Now trying to use bullet points using html ul tags:

```
<ul type="disc">
```

```
  <li>This is the first bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. It appears to wrap fine. The type of bullet forced to be a black circle is ignored and instead is overwritten by a square.
```

```
<ol type="i">
```

```
  <li>Trying to use an ol ordered list to see if it will show as an indented sub-bullet as it's nested within the other unordered list. Apparently not, but at least wrapping seems to work. The type of bullet forced to be a roman numeral is apparently overwritten by the normal default numbering 1 2 etc.</li>
```

```
  <li>trying to use an ol ordered list to see if it will show as a sub-bullet. Apparently not, but at least wrapping seems to work.</li>
```

```
</ol>
```

```
</li>
```

```
  <li>This is the second bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. It appears to wrap fine.</li>
```

```
  <li>This is the third bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. It appears to wrap fine.</li>
```

```
</ul>
```

It doesn't seem to be possible to include the bullet points as part of the paragraph using the ul html tag. Any new text below the bullets listed using ul also show automatically as a new paragraph.

Now trying it using the definition list (dl) with definition text (dt) and definition data (dd) html elements:

```
<dl> <dt>This is the first bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. </dt> <dd>This is the first sub-bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. </dd> <dd>This is the second sub-bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. </dd> <dt>This is the second bullet, there is lots of text, to see if when it's shown on
```

the page it wraps around properly or not. </dt> <dd>This is the second sub-bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. </dd> <dt>This is the third bullet, there is lots of text, to see if when it's shown on the page it wraps around properly or not. </dt> </dl>So using dl dt and dd does not work unless the this coding is wrong.

Now trying to use bullet points using notepad as an intermediate step:

- This is the first bullet.
- This is the second bullet.
- This is the third bullet.

Also looking to see if the text below the bullets is shown as part of the same paragraph or a new one. It appears to be shown as part of the same paragraph for comments if done in this way. However, using notepad has three main problems:

- it's not good html.
- it drops all the hyperlinks for references to endnotes, which then have to be added again manually.
- it doesn't word wrap properly, so when trying to include sub-bullets the formatting doesn't look right, for example with the following, using spaces coded as ampersand nbsp semi-colon to add the indentation for the sub-bullets, which are just not shown using the digress.it plugin with the twenty ten 1.1 theme:
 - This is the first bullet, there is lots of text, but when it's shown on the page it doesn't wrap around properly.
 - This is the first sub-bullet, there is lots of text, but when it's shown on the page it doesn't wrap around properly.
 - This is the second sub-bullet, there is lots of text, but when it's shown on the page it doesn't wrap around properly.
 - This is the second bullet, there is lots of text, but when it's shown on the page it doesn't wrap around properly.
 - This is the third bullet, there is lots of text, but when it's shown on the page it doesn't wrap around properly.

So it seems the only way to get styles working as desired is to copy the theme and modify the style sheet.

test test deep link to this bit of the page test back to top of page