Documentation for Convey module (version 1.0) – A guide for site administrators

Authors: Alison Straker and Nick Blundell

Convey allows users of a site to subscribe to updates on both site content and external content (via registered RSS feeds). The novelty of the module lies in the users' ability to easily focus their subscription on specific content using taxonomy terms (potentially with AND-ed joins) and key-phrases within content.

The user may specify their preferred means of information delivery as: email (immediate, daily or weekly digests) or a personalised RSS feed.

To further aid the user's ability to focus on specific content, the module can intelligently filter uncategorised content according to taxonomy definitions on the host site. For example, suppose one of our RSS feeds picks up a story about *a man that wrestles a shark*, convey will match keywords in the RSS item to the local taxonomy terms such as 'Shark', 'Wrestle'.

Since Convey is concerned with rapid information dissemination, it also offers a pure-Drupal mailing list system that site users can subscribe and post to, like mailman - but without mailman. All you require to make this work is a mailbox that supports POP or IMAP (e.g. gmail.com).

This module was developed by http://www.illuminateict.org.uk with rapid exchange of up-to-date focussed information among many voluntary and community organisations in mind and was funded by http://www.growingupinthewestmidlands.info and http://www.vcsmatters.org

Considerations before configuring Convey settings

There are three things worth establishing (only the first of which is essential) on a Drupal site before enabling and configuring the Convey module: configuration of your mailbox; setting up news aggregator; and setting up categorisation with the taxonomy module.

1) Configuring your mailbox to support Convey

To use the mailing list functionality of Convey, you need a dedicated email mailbox, where Convey can pick-up all incoming email to one or more mailing lists. Any IMAP or POP mailbox will do for this (e.g. a Gmail account, etc.). Once you have a mailbox set-up, you can give Convey the access details to read mail from it. Note that you can use this mailbox to handle multiple lists: all you need to do is ensure your list email addresses are forwarded to that mailbox.
The mailing out of personalised subscriptions is run using core Drupal features and does not require the setting up of a dedicated mailbox. The 'from address' will be either the one set explicitly in convey settings (e.g. no-reply) or the general site address by default.

2) Drawing information in to your site with news aggregator

The news aggregator is a powerful on-site news reader that can gather fresh content from news sites and weblogs around the web and make it available from a Drupal site.

For further guidance on this module and all its features see this section of the Drupal handbook:
http://drupal.org/handbook/modules/aggregator. The brief guide below draws upon the handbook to introduce the basics that are relevant to the Convey module.

Use of Convey does not depend upon the aggregator module, but its effective use can enhance the breadth of information disseminated to users.

NB It is important to be very selective and only to choose feeds that are likely to have a high proportion of relevant content. Convey can only pick up key words for information from external sites and will treat each of vocabulary 'term' (see information on categories below) as a key word/phrase, so could end up gathering and sending out irrelevant information if proper care is not taken in choosing feeds.

Practical steps

Enable module
First, make sure the aggregator module is enabled (if it is enabled *News Aggregator* will appear under *Administer >> content management*)

To enable the module (if required), go to *Administer >> Site Building >> Modules*.

Set access controls
It is also important to make sure that the relevant users are able to administer and/or access the news feeds. To do this, go to *Administer >> User management >> Access control*.

Add news feeds
To add a news feed, go to *Administer >> content management >> News aggregator*

When adding a feed, choose a name for it, give the full URL (including http://) and select how frequently the site should be checked for updates. NB the URL must be from a site that provides RSS feeds (usually you will see this symbol:) and you need to go to the news feed page and use that URL. It might end in /rss.xml for example.

Advanced options
From *Administer >> content management >> News aggregator* general settings can also be edited. There is nothing that needs to be set here to support convey. More advanced administrators may want to think about the discard date for information from feeds, however, as part of wider site management.

3) Developing categories (*vocabularies* and *terms*) with the taxonomy module

Taxonomy is a means of organising and categorising information on a Drupal site. For full guidance on this module see this section of the Drupal handbook: http://drupal.org/handbook/modules/taxonomy. The brief guide below draws upon the handbook to introduce the basics that are relevant to the Convey module.

Convey can work without the use of categories, simply by using keywords or phrases chosen by individual users as a means of filtering. However, use of categories through the taxonomy module allows for more powerful and effective filtering of information on the site.

The taxonomy module allows information to be categorised at the point it is added to the site. To make this possible, and to give consistent categories on which users can base their convey subscriptions, it is first necessary to create what are known as *vocabularies* and *terms*. For example, a site about woodlands might

have a vocabulary 'trees', and 'oak', 'ash' and 'elm' could be terms within that vocabulary.

NB In Drupal 5 the naming of the Taxonomy module is inconsistent across the administrative interface. On the *Administer >> Site Building >> Modules* page, for example, the module is called Taxonomy. However vocabularies are administered through the *Administer >> Content management >> Categories* page.

A word of warning: vocabularies and terms should be very carefully selected – be sure that they are not ambiguous and do not overlap with each other. Also, try to avoid too many too specific categories that might rarely be used and will make the system overly complex.

Practical steps

Enable module
First, make sure the taxonomy module is enabled (if it is enabled *Categories* will appear under *Administer >> content management*)

To enable the module (if required), go to *Administer >> Site Building >> Modules*.

Set access controls
Next, make sure that the relevant users are able to administer the module. To do this, go to *Administer >> User management >> Access control*.

Create vocabularies
To create a new vocabulary go to *Administer >> Content management >> Categories*. Existing vocabularies can also be managed from here. A new vocabulary requires a name and a description as well as some decisions about how it will be used.
For Convey you need to decide:
- which node types (e.g. book page, event) may be categorised with terms in this vocabulary
- whether multiple terms can be selected
- whether selecting at least one term from this vocabulary is 'required' when submitting information

You can also add some help text to enable your users to be clear about how each vocabulary should be used. This will help to make things consistent across the site.

Add terms to vocabularies

Once one or more vocabularies have been created, they can be populated with terms. Go back to *Administer >> Content management >> Categories* and *add terms* to the relevant vocabulary. You might want to think about giving each term a *weight* – which will determine in what order the terms will be listed (the lower the number the lighter it is and the nearer the top it will float) when users come to select them when adding content.

You will now note that when new content (of the sorts you linked to the vocabularies) is created on the site the vocabularies and terms will automatically appear to enable categorisation of content as it is posted.

Configuring Convey settings

To configure Convey settings go to *Administer >> Site configuration >> Convey.*

Subscription settings

Categories
The first step is to set up the site subscriptions. Begin by selecting which vocabularies to apply to Convey (this will determine the choice of terms that users have access to in their profiles).

AND-ed subscriptions
Next decide if users should be able to further refine their subscription by combining vocabularies – use the tick box to make the selection.

Sender address of subscription emails
Select the sender address from which subscriptions will be sent. NB this must connect to the mail settings you have already established.

Subscription email template
Customise the template for sending out subscription emails.

Information about new site subscriptions
When new subscriptions are generated Convey will send out mail based on input received over the past 10 days.

Email settings

In this section include the details from the mailbox configuration (see above). The following information is required:

- Mailbox location
- Mailbox username
- Mailbox password
- Email encoding

Mailing list settings

Convey allows for mailing lists to include both registered site users and non-registered users whose emails the site administrator can add when configuring mailing list settings. Convey allows administrators to set up as many lists as are required. The same procedure needs to be followed to configure each list.

Email address

Insert the email address for the mailing list (NB management of the domain used will need to be set up first, see above on mailbox settings)

Reply to list

Chose whether users will reply by default to the individual who posted the message to which they are responding or to the whole list.

Email subject prefix

Insert a short identification, usually within "[]"

Subscription method

Choose between a list to which users may add themselves and one the membership of which is controlled by administrators.

Short mailing list description

Briefly describe the list for the benefit of users

Non-user member addresses

Here you can add members to the list who do not have user accounts on the site, simply by entering in a list of email addresses. Note that, if these users later become members, Convey will automatically prune their addresses from this list, giving them full control over their mailing list subscriptions

Managing Convey Mailing Lists for site users

Populating email lists with site users

There are two ways of populating email lists, once a list is established. The first is for users that are already registered on the site. The second allows email addresses of non-registered users to be imported to enable wider participation in a mailing list.

To add registered users to a list

Go to *Administer >> User management >> Users* where Drupal 5 provides a convenient means of updating user settings in bulk.
By checking the tick box that appears to the left of a user's name and then selecting from the dropdown menu *[Convey] ADD users to mail list [list address]* under *Update Options* one or multiple users can be added to the selected mailing list.
Individual users may also be added to or removed from a list through their personal profile by going to *Administer >> User management >>* and clicking *Edit* for a specific user under the *Operations* heading.

To remove registered users from a list

Users are able to unsubscribe themselves from all lists, including those for which subscription is admin controlled, through their user profile (see user documentation) and should be encouraged to do so. Users can also be unsubscribed by administrators, either through editing the individual's user profile or by using the Update Options. To do the latter go to *Administer >> User management >> Users.* Check the tick box that appears to the left of a user's name and then select from the dropdown menu under *Update Options [Convey] REMOVE users to mail list [list address]*.

To add imported (non-registered users) to a list

Go to *Administer >> Site configuration >> Convey* and under the *Mail List Settings* heading go to the appropriate mail list and enter email addresses (one per line) in the *Non-user member addresses* box.

To remove imported users from a list

Follow the instructions as if to add a user and simply edit the import list accordingly.

Getting an overview of list members

To get an overview of all members of mailing lists go to *Administer >> Site configuration >> Convey* and under the *Mail List Settings* heading

follow the link to the *mailing lists* page. This lists members of all mail lists in alphabetical order by email address.

Connecting the imported users with registered users and avoiding duplication

Convey will automatically cross-reference email addresses between registered users and those that have been imported. When the settings page is saved any new registered users that were on the import list will be removed from it and subscribed through their profile.

Supporting users to subscribe to and unsubscribe from a list

Unsubscribe instructions

Convey automatically attaches a footer message to every email sent through the mailing lists giving instructions for users about how to unsubscribe and contact details for the list administrator should help be required.

Welcome and unsubscribe messages

Users will get an automatic welcome message, generated by Convey, when they subscribe/ are subscribed or unsubscribe/are unsubscribed from mail lists. This is triggered both by administrator and user led operations.

Deleting a mailing list

Mailing lists can be deleted simply by deleting the email address in the Convey mail list settings and then saving the settings.
If a list is deleted there is NO auto-generated message sent to users, so users should be emailed in advance with an announcement.

Managing list messages

Logs

Logs of messages that get sent to lists are visible in the drupal status logs, to see recent logs go to *Administer >> Logs >> Recent log entries*.

Message bounces

Currently, Convey does not have any sophisticated means of managing bounced mail.
If someone posts to the list but is not a member of it but are a member of the site, they will get an email saying they are not a member of that list; if they are not a member of the site, they will get no reply (since

replying allows us to be exploited by spammers performing denial of service attacks).

Is the message getting through?
The log will show who is being sent messages, but cannot guarantee that those messages get through.

If users are reporting that they do not get messages the following might help:

- Ask users to check their spam folders
- Ask users to add the mailing list addresses to their address book. Anything in a user's local address book is usually considered to be a real user, so should not be blocked when a message comes from it. This is referred to as white-listing – the opposite of black-listing
- Check that the user's email address is correct on the site (i.e. user profile, or a site admin to check import list).

Documentation for Convey module (version 1) – A guide for site users

There are two main features of Convey: site subscriptions (the dissemination of relevant website content direct to users); and mailing lists (to enable easy group communications through use of a single mailing list email address).

Convey site subscriptions allow registered users of a site to subscribe to updates on both site content and selected external content with the following features:

- Each user may specify their preferred means of receiving these updates as: email (immediate, daily or weekly digests) or a personalised RSS feed.
- Users may also ensure they only receive information that is pre-filtered according to their own selection of categories and keywords/phrases.

Convey mailing lists offer a pure-Drupal mailing list system that site users can subscribe and post to, like mailman - but without mailman. It is also possible for people who are not registered site users to participate in mailing lists.

Convey was developed by http://www.illuminateict.org.uk with rapid exchange of up-to-date focussed information among many voluntary and community organisations in mind and was funded by G:up http://www.growingupinthewestmidlands.info.

Use of mailing lists

Subscribing to lists and unsubscribing from lists

Registered users should login to the website and go to *My Account.* Clicking on the *edit* tab will allow the update of all aspects of the user profile. (It is worth checking at this stage that the user's email address appears correctly).

Under the heading *Mailing lists* will be a list of all the mailing lists offered by that site to which users can subscribe themselves. To

subscribe/unsubscribe from a particular list check/uncheck the tick-box next to the list name and click *submit* at the bottom of the page.

A message will be sent from the site confirming the subscription or unsubscription.

NB there may be other lists that are restricted in access. A user wanting to join one of those will need to contact the site administrator.

Non-registered users are able to join or leave mailing lists but will need the help of the site administrator to do so. It is preferable therefore for a user to register with the site and have control over his/her own participation.
Every email coming from a mailing list should contain a reminder about how to unsubscribe as well as details of how to contact an administrator if required.

More than one email address?
Users may have more than one address from which they would like to post to a list, or may have two forms of the same email address. If this is the case, in *My Account* under the *edit* tab there is an option for *your alternate email addresses*. Any additional email addresses from which mail will be **sent** should be entered mail here. Don't forget to hit the submit button at the bottom of the page.

The mailing list will reject any email that comes from an email that is not either the main registered user email or listed in this box. Mail will continue only to be posted to the main registered user address.

Mailing to lists

The group mailing list address is indicated on the *My Account* page under *Mailing lists*. It will also be included in the welcome email sent out to users on subscription.
To send an email to the list (and all others subscribed to the list) users simply send an email in their usual way (e.g. from Outlook or Thunderbird or through web-based email such as Yahoo) addressed to the mailing list address.

Emails will only be accepted from users that are subscribed to the list (and from the email address or addresses that have been linked to that user).

When replying to a message sent to the list by somebody else, users should take care of exactly where the reply is sent. Some lists are set up so that hitting the reply button will automatically address the reply to the whole group, whereas others are set up so that hitting reply will by default reply only to the individual setting the message. Before hitting *send* users should check that the message is addressed as required.

Mailing list etiquette

For users that are new to mailing lists, it can be worth spending a little time reading up on mailing list etiquette in order to get the most out of participation in the list, and in order not to upset other users!

There are many detailed guides available online, such as those found at:

http://www.dtcc.edu/cs/rfc1855.html#3
http://wiki.exim.org/MailingListEtiquette

Use of site subscription

How the category system works

Drupal websites can make use of 'taxonomies' in order to tag/categorise information posted to the site with 'terms' from one or more vocabularies. For example, a site about woodlands might have a vocabulary 'trees', and 'oak', 'ash' and 'elm' could be terms within that vocabulary.

This can be very useful when users want to find information that relates only to specific areas covered by the website. The Convey module combines this along with a facility for filtering information by keywords/phrases that supports users to create personalised subscriptions that they can then access by email or RSS feed.

Setting up subscriptions – getting the right information at the right time and in the right place

Registered users should login to the website and go to *My Account* (this feature can only be used by registered users). Clicking on the *edit* tab will allow the update of all aspects of the user profile. (If you plan to get your subscription by email, it is worth checking at this stage that the user's email address appears correctly).

Information Filters
Under the heading *Information Filters* will be a list of the categories that are used on the site. Each vocabulary will form a heading under which a list of terms will appear. Simply check or uncheck the relevant tick-boxes to select or deselect categories.
By selecting a category the user will get all information that is tagged with that category included in his/her personalised subscription.

More refined filtering is possible on sites with multiple vocabularies. If there is more than one vocabulary then there will be an option at the bottom of the list of terms allowing the user to link the selected terms in that vocabulary with the terms selected in other vocabularies. By selecting 'only with my [other vocabulary] selections' users link the terms in the two vocabularies so that the user's personalised subscription will only include information tagged with terms selected in both vocabularies.

For example, let's imagine the website about woodlands had a second vocabulary 'location' with 'Europe', 'Asia' and 'Africa' as terms in that vocabulary. If the terms 'Ash' and 'Oak' were selected under the 'trees' vocabulary and the term 'Asia' under the 'location' vocabulary, by ticking the 'only with my location selections' the user would restrict the filtering of articles to include only those that were about Ash/Oak AND Asia.

Key phrases
It is also possible to specify key words or phrases. Any content containing an exact match to the keyword or phrase will then automatically become part of the user's personalised subscription. This will override any filtering by *term* as described above.

Intelligent filtering – or not
The next choice is to decide whether to use intelligent filtering. The best way to understand what intelligent filtering does is to first understand that content is not always categorised accurately (and it may not be categorised at all). Intelligent filtering tries to match, as closely as possible, the categories you have selected to uncategorised content by looking for words and phrases within the text.

I want everything
This option allows users to override selections to receive all information that passes through the site. This is only advisable if users want to better tune their filtering by checking what information they

might be missing with their current settings. WARNING: use this with caution, because it may result in getting a lot of emails and making it harder to see items of interest (c.f. needle in a haystack).

Information delivery
The next set of options (still on the *Edit* tab of *My Account*) allows users to choose how and when they get information.

Under the heading *email options*, *t*he first drop down box allows users to choose between 'No email I will use RSS', 'immediate email', 'daily digest email', and 'weekly digest email'. Each of these determines how and when a user's personalised subscription comes to them.

Selecting 'immediate email' means the user will get information in an email soon after it arrives on the site. The other two email options provide a choice between getting the same information but bundled up in on daily or weekly digest – like tailored magazines.

Users selecting RSS will need to click the submit button and then return to the same page to click on the words 'RSS feed' in the text below the drop-down box which will take them to a page with their personalised RSS feed and enable them to set up the link to their RSS feeder.

Users wanting to find out more about using RSS feeds or accessing subscriptions with a news feeder can find a simple introduction on the BBC website: http://news.bbc.co.uk/1/hi/help/3223484.stm

Under the heading '*level of detail in emails'* the drop-down box allows users the choice between headlines, summaries and full text. Users choosing to get headlines and summaries will be able to follow links in their emails to the relevant webpage with the full article.

Changing or cancelling a subscription
To change or cancel a subscription, just adjust the settings in the same way as mentioned above for the set up.