RUTGERS SALTS

Directors: Nina Wacholder, Mark Aakhus, Smaranda Muresan
Co-written, edited and tested by Alexander Pichugin

For more information, contact ninwac@rutgers.edu

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Opposition Project Coding & Annotation
Version of 07/07/2011

Goal: To mark up the text to indicate:
1) all call-outs
2) all targets of call-outs
3) all links between each call-out and the associated target.

The marked up text will be used for further hand and machine processing as outlined in our project proposal.

Source of quoted text: “I quit the iPhone” blog.

I. OVERVIEW

Basic Terms:
• Action
• Prior action
• Subsequent action
• Action-opposition sequence  
• Call-out  
• Target  
• Co-reference

**Simple definitions of basic terms via a simplified example** (*Call-out, target and co-reference* are discussed in more detail below):

1. I’m going to quit the iphone and switch to an android phone because I can no long *(sic)* put up with the AT&T service contract.

2. I am going to switch too.

3. There is no point quitting the iphone because of the service package, just jail break it and use the provider you want.
**Action:** ‘Doing something,’ which includes ‘doing something with words’. With words we can assert, request, claim, promise, and so on. 1, 2 and 3 are all actions. For our purposes here, subparts of an action are also actions, e.g., “I’m going to quit the iphone” or “I can no long put up with the AT&T service contract.”

**Prior action:** 1 is a prior action because it precedes some other actions that refer to it (2 and 3).¹

**Subsequent action:** A subsequent action takes place after a prior action. Both 2 and 3 are subsequent actions (in this example). You can’t have a subsequent action unless there’s been a prior action.

**Action-opposition sequence:** prior action and subsequent action are terms for conceptualizing how two utterances by different people bear a relationship to each other in a conversation. The subsequent action is doing something to the prior action. Sometimes subsequent action opposes (expresses some kind of disagreement with) prior action. In the broader study, to which this coding contributes, we are interested in this oppositional relationship between prior action and subsequent action. So, the annotating task focuses on identifying how a subsequent action calls out a prior action and what is called out about that prior action.

**Call-out:** Call-out is (a part of) a subsequent action that selects (a part of) a prior action and marks and comments on it in some way. So in this example, 2 and 3 are both call-outs, i.e., they perform the action of calling out on 1. 2 calls out the first part of 1 dealing with switching phones. 3 calls out all of 1 – both what’s proposed and the rationale for it.

**Target:** Target is a part of a prior action that has been called out by a subsequent action. 1 is a target of 2 and 3. But 2 and 3 link to different parts of 1, as described above.

**Co-reference** in the action-opposition sequence: Co-reference occurs when a subsequent action refers back to a prior action. Co-reference is evident in the 1-2 and the 1-3 relations. In this project, co-reference refers to the link between the call-out and the target. Co-reference is a basic feature of language use that makes calling out possible, thereby enabling opposition.

Your job in coding is to label call-outs, targets and co-references. This work is a key starting point for the study and central to the aims of the broader project.

¹ Note that the example given is oversimplified for the purpose of illustration. The example introduces some ambiguity that would have to be addressed in actual coding. For instance, it is reasonable to say that 3 is calling out 2 and 2 is calling out 1, or that 3 calls out both 2 and 1 simultaneously. You will have to use your judgment about what seems best, but we have also developed some procedures for how to handle these situations (see the FAQ). We will never get 100% agreement on a task like this.

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II. GUIDELINES FOR ANNOTATION

There are three steps for annotating each instance:

1. Identifying and labeling:
   - call-out
   - target
   - co-reference

2. Verifying that each call-out is properly associated with a target by a co-reference. There is an exception for type 3 call-outs (see below)

3. Adding comments

1. IDENTIFYING CALL-OUTS, TARGETS AND CO-REFERENCES

• CALL-OUT

Definition: A call-out is a subsequent action that selects (i.e., refers back to) all or some part of a prior action (the target) and comments on it in some way. In addition to referring back to the target, call-out includes one or both of the following:
  - Explicit stance (indication of attitude or position relative to the target).
  - Explicit rationale (argument/justification/explanation of the stance taken).

In our present annotation scheme, we assume that call-out identifies relationships between the opinions of participants in the interaction. The call-out generally highlights either a positive or negative stance toward the target.

Illustrative examples of call-outs, stances and rationales:

1. I hate the iPhone. (In the original posting)
2. <call_out> <stance> I hate the iphone </stance> <rationale> because of its price. </rationale> </call_out>
3. <call_out> <stance> I hate it. </stance> <rationale> Don’t you see that the price is ridiculous. </rationale> </call_out>
4. I just saw an article that talks about the iPhone’s features.
   Note: 4 is not a call-out. 4 includes a reference to the iPhone, which was discussed previously, but 4 does not have an explicit stance or rationale.
5. <call_out> <rationale> The iPhone has a wonderful interface. </rationale> </call_out>
6. <call_out> <stance> I hate the iPhone </stance> <rationale> because of its price </rationale> </call_out> <call_out> <stance> but I love it </stance> because of its features </call_out>
7. <call_out> <rationale> It’s expensive </rationale> <rationale> but the features are great </rationale> </call_out>

Notes on relationship between stance, rationale and call-out:
• The presence of the stance or rationale distinguishes the call-out from other prior-subsequent relationships in a dialogue. Either the stance or the rationale must be explicit. Therefore, for the purposes of the annotation, if there is no stance or rationale explicitly present in the text, then there is no call-out.
• Stance may be implicit in the presence of an explicit rationale and rationale may be implicit in the presence of an explicit stance.
• If there is an explicit stance and a rationale, they should be both included in the call-out.
• The prototypical order is that stance precedes rationale, but sometimes rationale precedes stance.

Some examples of stance:
• I agree
• I disagree
• +1 (means I vote for that)
• stfu (shut the fuck up)

Some examples of rationale:
• A: Why is that great? because the other carriers treat their customers so much better?
• B: My carrier T-mobile does. After being a loyal customer for 3 years (2 year on contract +1 year without contract) they automatically upgraded my family plan to unlimited everything and didn’t ask for a contract. And the cool thing is i never dropped a call on T-mobile in the last 3 years. And once upon a time i was AT&T customer!

• Excellent decision. Android equals the freedom to pick between an ever growing number of phones and to reap the benefits of an open source platform. Also the powerful combination of Android, Google apps and Google Wave is proving to be very useful for new ways to collaborate, which Apple cannot offer.

• I don’t miss using the iPhone as a phone. It was always awkward for me holding this smooth piece of metal and glass to my ears, constantly trying to convince myself that I was talking on a phone. I might as well have place a crystal ashtray to my head, or some other inauspicious object you find in a living room.

Distinguishing a call-out from a non-call-out based on the presence of an explicit stance:
Consider two actions: Good luck! vs. Good point!
Both actions contain some positive assessment (good) of something stated in a prior action.
• Good luck! • Even if this action might provide a general reference to the context of the conversation, it does not refer directly to something particular that was said before, i.e., an explicit stance to a target is not present. Since there is neither an explicit stance nor an explicit rationale, it is not a call-out.
• Good point! • This action refers directly to the content of a prior action, summarizing and assessing it, i.e., it has an explicit stance. While referring to the target (see below), it explicitly states the stance pertaining to the target. Since the action contains an explicit stance it is a call-out.

• **TARGET**

  **Definition:** Target is a part of a prior action that has been called out by a subsequent action.

  **Notes:**
  • Not all parts of a prior action are necessarily called out.
  • It is possible that the call-out raises virtual standpoints that were neither intended nor meant in the prior action.
  • The target does not have to be substantive – that is, about propositions or content – as the manner or style of something prior can be called out (e.g., spelling, word choice, timing or phrasing) as well as the character of the person who performed the prior action.
  • When labeling the target for a call-out, try to be as specific as possible in selecting your target text (i.e., pick the minimal sequence of text).

• **CO-REFERENCE**

  **Definition:** Co-reference is the link between a call-out and a target. Establish a co-reference only between a call-out and the most recent target.

  • There are three types of links between call-out and target:
    **Type 1:** In the typical case a call-out will link to a target that is a specific segment of text (e.g., a phrase, a clause or a sentence).
    **Type 2:** If you can’t find a Type 1 link, look for a target that consists of a longer sequence of text (e.g., multiple sentences, an entire action, a sequence of actions).
    **Type 3:** If you cannot see that the call-out refers to something specifically in the text or to something a section of text seems to be about, then consider whether the call-out is referring to something outside of the current posting thread. Type 3 is a last resort for call-outs that clearly are not Type 1 or Type 2. If the call-out is Type 3, indicate this in the Comment Field for the call-out. Add the label Type_3 and provide a brief description of what’s being called out.

2. **ANNOTATION ACCOUNTING**

   When you’re done with a section of text, double-check the following:
   
   ✓ **Target:** Every target has to be linked to at least one call-out
✓ Call-out:
  • For co-reference Types 1 and 2, each call-out should be linked to a target.
  • For co-reference Type 3, the call-out refers to “something expressed through the text but not specifically there”; something outside of the posting (original blog entry + all the text). Each co-reference Type 3 should have a comment.

✓ Co-reference:
  • Co-reference Types 1 and 2 should link a call-out and a target.
  • The number of call-outs should be equal to the total number of co-references of types 1, 2 and 3.

3. ADDING COMMENTS AND HANDLING PROBLEMS

It is helpful when you can provide comments about your annotation choices in the field for each annotation such as:
  • Why you annotated this text as a call-out
  • Why you selected this text as the target
  • The relationship between the call-out and the target
  • Features, characterizations, etc.
  • Notes that will help later on as we further define more specific types of call-outs
  • Notes to help you remember / clarify why you did what you did
  • Questions, issues, and anything problematic that you may wish to discuss

It is recommended to add comments as you annotate, though it is possible to add comments at any point.

Problem cases: If you are not sure how to label text, use the Too_difficult_to_code annotation. For example, you might use Too_difficult_to_code if you can’t decide whether something is a call-out or what the target is. The use of Too_difficult_to_code should be a last resort. If you mark a part of the text using Too_difficult_to_code make sure that this part of the text is not annotated as call-out or target.

III. FAQs

• Can the same text be both a call-out and a target?
  → Yes.

• Can a call-out be embedded within another call-out or within a target?
  → Yes.

• Can a target be embedded within a call-out or within a target?
  → Yes.

• Can a single call-out cross sentence boundaries?
  → Yes.

• Should I pay attention to the information about who is calling what out that is indicated by the wording or the conversation level?
Yes. For example, if the poster (= person who posts) addresses a previous poster by name (e.g., Wordie7, I agree), the target of the call-out is Wordie7’s comment (use your judgment about whether it’s all or part).

- What should I do if I’m not sure?
  → In general, follow your first instinct.
  → If you find that you’re stuck, pick whatever seems best and then add a comment about your uncertainty.
  → If you’re really not sure, annotate with Too_difficult_to_code.

- How much text should I label as call-out?
  → Include both stance and rationale as part of the call-out, if they are explicit. This follows from the definition of call-out as including stance and rationale.
  Example: iq100 Comment 116:
  I don’t think it is Apple deciding. I worked for a major wireless vendors for years watching the wireless carriers controlling what goes into handsets. They do not want to be just a pipe.
  1. I don’t think it is Apple deciding.
  2. I don’t think it is Apple deciding. I worked for a major wireless vendors for years watching the wireless carriers controlling what goes into handsets. They do not want to be just a pipe.

  1 only includes stance; 2 includes stance and rationale. Therefore, 2 should be annotated as the call-out.

- Can a single comment contain multiple call-outs?
  → Yes. If parts of a comment refer to different targets, they are distinct call-outs.
  Example: iq100 Comment 5:
  1. I agree, the BlackBerry is far superior, that is unless you need 100 fart apps.
  2. 256MB of onboard memory is more then enough: I can store the last 6 months of e-mails, SMS, MMS, BlackBerry Messenger, and GoogleTalk messages have lots of apps without any memory issues.
  3. The media player is great on the BlackBerry: it indexes all artists and songs so you can instantly find what ever song/artist you're looking for. I much rather have that then have to swipe my hand back and forth...
  4. I will say Picture viewing on the iPhone/Touch rocks, that is the only thing I envy.

  All 4 parts rather clearly refer back to a different call-out, so they are separate call-outs. However collectively, Comment 5 is an example of a call-out that includes 4 examples of call-outs.

- Can a single rationale be long extending over several paragraphs?
  → Yes. However, make sure that all text marked as rationale contains information pertaining to the call-out.
  Example of a long rationale (iq100, Comment 23):
  Apple and AT&T are forcing you to switch? Hardly. (Stance)
  You are being presented with a CHOICE to make ... because of your preferences not theirs.
  This is what competition and business are all about. As an educated consumer you're forced to make a choice. You may not like it, but you have choices.
Telling Apple to make available a competitive application IN THEIR STORE is like telling Starbucks they should allow Folgers to advertise in its stores.

Ultimately as a storekeeper you determine what to put into your store to grow (and protect) your business. Your customer always has a choice of whether to buy from you or not, but as a business owner you have your rights too.

- If a comment includes a direct or almost verbatim quote from an earlier comment is this a part of a call-out?
  → Yes.
  
  Example: iq100, Comment 58:
  You state Google has a solution for that too, though. They are releasing apps for a variety of handsets that effectively take over the native dialer, address book and call log. Problem solved. I can use any phone I like, or a bunch of phones, and just choose the one that makes sense at any time. I never have to be tied to a carrier and their restrictive contracts again.

But aren’t you just changing the problem? What you are in effect doing is--instead of tying yourself to carrier--tying yourself to a phone that has a Google Voice app? Further, you’re also tying yourself to Google Voice aren’t you? Setting the obvious privacy issues aside for now (red flag goes here), from what I’ve read of the terms of service from Google Voice, once you switch your number, you can’t go back.

I currently have a Google Voice account, again aside from the transcribing issues I’ve repeatedly experienced, in general, it’s only half baked so far.

The first paragraph of comment 58 is a quote from an earlier comment, with the words “you state” added at the beginning. This is an example of a call-out in which the poster indicates exactly which text is being called out. While annotating, include the restatement as part of the call-out. When the system looks to establish links between call-outs and targets, it should easily find the link between the call-out and the target, because the sentences are almost identical.

If you use these guidelines, please cite this publication:

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