Archivists and Scholarly Editing

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In July 1995, I joined the faculty in the Special Collections Department of Bailey/Howe Library at the University of Vermont (UVM). I was expected to put the descriptions of their holdings online. I knew the little collections were easy (MARC records in the university’s online catalog would do), but what about the longer inventories—some as long as 300 pages? That problem had me flummoxed. However, at the Society of American Archivists meeting in August of 1995, I saw Daniel Pitti demonstrate Encoded Archival Description (EAD), an SGML (now XML) protocol for publishing archival inventories on the web. I knew I had found the answer.¹

Over the course of the next two years, Hope Greenberg, the Humanities Computing Specialist at the Academic Computing Center, and I brought the DynaText suite of SGML publication software to campus. A programmer I knew volunteered to develop some utilities to make the markup go reasonably quickly, and we developed an EAD shop. Among others, we put online the inventory to our collection of the papers of George Perkins Marsh.

Marsh (1801–1882) was a nineteenth century polymath who wrote on, among other things, the habits of the camel, the history of the English language, and the negative impact humanity has had on nature.² He heavily influenced the architecture of the Vermont State Capitol during its rebuilding in 1857, heavily influenced the character of the Smithsonian Institute at its inception in 1847, and stills holds the record as the ambassador of longest tenure in one position with twenty-one years as the U.S. ambassador to Italy. He spoke more than twenty languages. The Marsh Collection was probably UVM’s most renowned collection internationally.

¹www.loc.gov/ead
With our EAD work running smoothly, Connell Gallagher, then Director of Research Collections and my supervisor, suggested we digitize a selection of the Marsh papers for publication on the Web. “Sure,” I said. “We could use EAD on the inventory and the Text Encoding Initiative (TEI), an SGML (now XML) protocol for humanities documents, on the letters and create a hyperlink between the two.” Does that sound like a good idea?

We received some money from the Woodstock Foundation. (Marsh’s boyhood home in Woodstock, Vt. had passed from his family to the Frederick Billings family, which married the Rockefeller family, which set up a foundation to fund projects in and about Woodstock.) We hired Ellen Mazur Thomson who, as a volunteer, had been reading and selecting Marsh letters for us to publish, and we settled in to start.

I shudder to think what would have happened if Harry Orth hadn’t retired from the UVM English Department about then. Ralph H. Orth had spent a distinguished career as an Emerson editor and understood documentary editing backwards and forwards; I had never heard of documentary editing. Harry had indicated to Connie, a friend of many years, that he was looking for an interesting project to keep him occupied. Connie asked if he would help us get started.

For the next three years, Harry treated the Marsh project as a half-time job—at no pay. He set up a workflow system; he oversaw the transcription and reading process; he taught us to research (who knew that nineteenth century travel guides to Italy list the barbers in Livorno?). Harry saved us from ourselves.

With Harry focused on the editorial process, I focused on the technology. Just at the point I was struggling to get my head around TEI, I received an invitation to an NHPRC-funded workshop David Chesnutt was offering on the Model Editions Partnership (MEP). The MEP project extended TEI specifically for historical letters; it was just what we needed. On the last morning of that workshop, the attendees gathered to put what we had learned into a context. By then I understood fully that I had stumbled into an erudite world, and my ignorance of it showed all over the place. At some point in that group conversation I mentioned that we had this old guy named

3www.tei-c.org
4bailey.uvm.edu/specialcollections/gpmorc.html
5Lawrence and Mary Rockefeller eventually donated the property to the federal government. The National Park Service opened it as the Marsh-Billings-Rockefeller National Historical Park in 1998. www.nps.gov/mabi.
6mep.cla.sc.edu

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Harry Orth helping us, and the unflappable David Chesnutt flapped. "YOU have Harry Orth working with you?" With that I understood how fortunate I was to have fallen into Harry's good hands.

Documentary editing is a mature discipline which relatively few librarians and archivists, and even fewer library and archives educators, know about. But they should. We all know that the holdings in historical repositories stand more-or-less alone. But as the published and electronic holdings of one library come to look more and more like the holdings of another, it is the unique materials in a libraries’ archives and special collections that distinguish it from all the others. Increasingly the librarians and archivists in charge of those institutions face pressures to digitize their unique holdings and post them, and their finding aids, to the web. I can attest from personal experience that as they embark on that work, most have no idea of the Gordian knots they will confront until they appear in the middle of a project—knots the documentary editing community has already untied.

While most digital libraries and electronically published archival collections of primary documents will never become full-blown documentary editions, they should all arrive on the Web through a process that assures at least clean and accurate transcriptions of the text following consistent, well-articulated policies about spelling, punctuation, missing or illegible language, etc. Further, most historical documents need some application of the indexer's art to assure that vague, colloquial, or archaic language does not keep them from researchers' awareness.

I teach two classes at LSU in which I make these points to my students. In Archives 101, I argue that archivists should know at least the basics of documentary editing because posting historical documents on the Web can happen in many ways. While all ways require a commitment of resources on the part of the creating institution, not all ways create a product that provides equal benefit to the researcher—be that researcher an elementary school child or a seasoned academic. Not all create a product that interacts easily with other scholarly material on the Web. Not all create a product that will withstand migration across the generations of hardware and software platforms that lie ahead of us. Therefore, if an institution makes the commitment to put its holdings on the Web, doesn't it make sense to post them in a way that will support researchers, that will interact well with other materials, that will migrate safely?
To get students into the process, I use a single event published in each of the three editions of Mary Boykin Chesnut’s diary. I find the students surprised at the differences in the text. They get genuinely engaged in a discussion of what constitutes an honest treatment of a document and an honest presentation of history. During the last segment of class, we review the ADE’s “Guidelines for Electronic Documentary Editions.” As an assignment, I require them to critique three web collections of at least twenty-four documents, using those guidelines. The lesson takes one class period followed by a 5–7 page paper.

In another class, Electronic Description of Archival Materials, we cover EAD, the MEP extension of TEI, and MARC—the technical protocols they need to use to create technically robust and intellectually rich digital collections. Not all students in that class have taken Archives 101, and so I spend a class on documentary editing there as well. I repeat much of the rationale I give in Archives 101, but for our case studies, we use the letters they must actually mark up. Again, the single session opens a lot of eyes and raises a lot of questions. Then we dive into the technology.

I do not expect to create full-blown documentary editors; I do expect to produce archivists and librarians who will recognize when they have started to wander into the realm of documentary editing and will look for help. They might not have a Harry Orth show up and rescue them.

As documentary editors have come to appreciate the value of authority files and other library standardization practices that make interoperability possible, so the library and archives worlds need to appreciate that documentary editors have solved problems they’re just beginning to grapple with. I encourage you to introduce yourselves to those worlds through presentations at Society of American Archivists meeting and digital library meetings. You have spent decades refining this wheel. Don’t leave the librarians and archivists to reinvent it alone; their wheels may not roll as well as yours do.

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8 etext.lib.virginia.edu/ade/committees/electronic_minimum_standards.html