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# Web 2.0 and Documentary Editing in the 21st Century

Max J. Evans<sup>1</sup>

Since its widespread adoption only a dozen years ago, the Internet has transformed the information economy in one of history's most astoundingly rapid adaptations to technology. The Internet has become a way to quickly, easily, and inexpensively disseminate information. Documentary editors were quick to see its potential, evidenced by the groundbreaking Model Editions Partnership, the growing number of documentary editing project web sites, and recent forays into online publishing by academic presses. The story of publishing online to reach audiences hitherto unreachable or even unknown is the story of democratizing the use of primary source materials.

I begin with a brief survey of the state of publishing documentary editions on the Web. I will be brief because I'm not here to make a case for publishing online, something you will do without prompting, because of economic and market forces. Instead, my purpose is to introduce documentary editors to the brave new Web 2.0 world.

## Using the Web to Publish Historical Texts

There are many ways to publish. Since Gutenberg the term "to publish" has become almost synonymous with "to print and distribute text and graphics on paper." However, "to publish" used in a more universal sense is *to make generally known, publicly announce, or disseminate* to the public. Reading a proclamation from the courthouse steps or tacking a notice to a bulletin board qualifies, as does posting on a public web site.

Editors of historical and literary documents, and their publishers, while continuing for the most part to subscribe to the more narrow definition, *to*

<sup>1</sup>From the paper given at the ADE Annual Meeting in Richmond, Virginia, November 16–18, 2007. The opinions expressed are the author's own and are not necessarily the position, policy, or opinion of his employer, the National Archives and Records Administration or the National Historical Publications and Records Commission.



Max Evans at the ADE Annual Meeting in Richmond, Virginia  
(16–18 November 2007)  
Photograph courtesy of Sharon Ritenour Stevens.

*print and release for distribution*,<sup>2</sup> are coming to realize the power of the Web to reach a new audiences with their scholarly works. There are many examples of documentary publishing online, with many more in the wings.

The NHPRC-supported Model Editions Partnership (MEP) set the stage for some of the online editions. They constitute one class: marked-up documentary publications. They are essentially electronic books, with XML markup for content. A full list of MEP works online is found at the MEP website.<sup>3</sup>

MEP is but a subset of a class that includes all electronic editions, including those not marked up, such as PDF and other image editions of the printed page, or other full text editions. The Booker T. Washington edition published online by The History Cooperative is one example.<sup>4</sup>

Another variation is transcribed works. An example is the online edition of the Benjamin Franklin Papers, sponsored by the Packard Humanities Institute.<sup>5</sup> All of the papers are transcribed; not all are yet verified. Annotation consists only of biographical notes.

The future of documentary editing favors editions based on MEP or similar markup schemes. An example is the online-only edition of the Dolly Madison Papers published by Rotunda, the University of Virginia Press online imprint.<sup>6</sup> Rotunda plans to publish both retrospective and prospective editions of hardcopy works as well as electronic only.

In addition to replicating in some manner the book, with transcribed text, annotation, and other scholarly apparatus, some documentary editing projects are producing electronic *image* editions.

Publishing document *images* has a long pedigree. Print editions often include images as illustrations. Comprehensive microfilm editions continue to provide useful sources for research. The NHPRC once supported microfilm editions and continues today to support hybrid projects: selected print editions with microfilm supplements. Some examples are the Margaret Sanger Papers and the Thomas Edison Papers.

Think of microfilm as a forerunner to electronic image publishing. Here are a few examples:

<sup>2</sup>Based on definitions from the Merriman-Webster Online dictionary. (<http://www.m-w.com/>)

<sup>3</sup><http://adh.sc.edu> (accessed 23 November 2007).

<sup>4</sup><http://www.historycooperative.org/btw/> (accessed 23 November 2007).

<sup>5</sup><http://www.franklinpapers.org/franklin/> (accessed 23 November 2007).

<sup>6</sup><http://rotunda.upress.virginia.edu/> (accessed 23 November 2007).

- The Papers of John Jay at Columbia
- The Thomas Edison Papers at Rutgers
- The Papers of the War Department at George Mason<sup>7</sup>

In addition, archives and other historical records repositories distribute online collections of document images. Some of these projects are supported by grants from the NHPRC, NEH, IMLS, and the Library of Congress (through its American Memory grants). For example, The Shipler Glass Negative Collection at the Utah State Historical Society, The Aldo Leopold Papers at the University of Wisconsin, and the Papers of Thomas Jefferson, and The Papers of George Washington both at the Library of Congress.<sup>8</sup>

Clearly, these online collections are published, although they lack the scholarly annotation documentary editors can provide. Online publishing of images of collections may be sufficient in itself, or, *it may be considered only a step in the process of producing full documentary editions*, online or in letterpress volumes.

Publishing is the end. Using the Internet is but one means. But the Internet can be more than a publication medium. It can dramatically change the documentary editing enterprise by incorporating Web 2.0 tools and processes that change the documentary editor's work.

### Something “wiki” this way comes

The Internet is changing how information is collected, created, and distributed. Part of the reason for this evolution lies in the nature of the Internet and how systems and processes have grown. The open source movement, which promulgated the practice of freely sharing and modifying programming code led to a shift in attitudes. The old practice of one publisher distributing to many users has shifted to a more free market approach of sharing information and knowledge. Many creators and producers reach many users. Perhaps the most famous example of this is Wikipedia, the online encyclopedia maintained by an informal, anonymous, and self-selected com-

<sup>7</sup><http://www.columbia.edu/cu/lweb/digital/jay>, <http://edison.rutgers.edu/digital.htm> and <http://wardepartmentpapers.org/> (all accessed 23 November 2007).

<sup>8</sup>The Shipler Collection was digitized with funding from an NEH grant [http://history.utah.gov/utah\\_history\\_research\\_center/shiplercommercial.html](http://history.utah.gov/utah_history_research_center/shiplercommercial.html) (accessed 23 November 2007); The Leopold Collection is being digitized with funding from the NHPRC; the Jefferson Papers and the Washington Papers were digitized by the Library of Congress from microfilm as part of the American Memory Project <http://memory.loc.gov/ammem/gwhtml/gwhome.html> (accessed 23 November 2007) and [http://memory.loc.gov/ammem/collections/jefferson\\_papers/](http://memory.loc.gov/ammem/collections/jefferson_papers/) (accessed 23 November 2007).

munity whose members contribute articles on a vast array of topics.

Wikipedia is but one example of the changing nature of the Internet, and you need not look far to find other tools: from blogs to YouTube, from MySpace to the latest new thing from Google. This isn't your father's Web anymore, and some people are talking about the next iteration as Web 2.0. Wikipedia says the term "refers to a supposed second-generation of Internet-based services—such as social networking sites, wikis,<sup>9</sup> communication tools, and folksonomies<sup>10</sup>—that let people collaborate and share information online in previously unavailable ways."<sup>11</sup>

Some of those ways include working together in real time on shared problems and projects, and contributing expertise, knowledge, and data. Some examples are the computer operating system Linux and its continuing development; the mapping of craters on Mars by thousands of volunteers; the gaming culture of people who create and continually modify a thriving virtual world; Flickr.com, Blogger, YouTube, and many others.

My paper challenges documentary editors to rethink their methods and techniques; to consider how the World Wide Web can be seen as a *virtual production facility* that engages the skill, knowledge, talent, and interests of a global community. The development of Web 2.0 tools and techniques, such as Del.icio.us and Flickr has demonstrated the viability of this approach. Folksonomies and social tagging are growing phenomena demonstrating that interested individuals will devote their time and energy to make sense of the World Wide Web.<sup>12</sup>

<sup>9</sup>A wiki is a type of computer software that allows users to easily create, edit and link web pages. Wikis are often used to create collaborative websites, power community websites, and are increasingly being installed by businesses to provide affordable and effective Intranets or for use in Knowledge Management...., 'the simplest online database that could possibly work.'" from a Wikipedia entry <http://en.wikipedia.org/wiki/Wiki> (accessed 23 November 2007).

<sup>10</sup>"Folksonomy (also known as collaborative tagging, social classification, social indexing, social tagging, and other names) is the practice and method of collaboratively creating and managing tags to annotate and categorize content. In contrast to traditional subject indexing, metadata is not only generated by experts but also by creators and consumers of the content. Usually, freely chosen keywords are used instead of a controlled vocabulary." From a Wikipedia entry <http://en.wikipedia.org/wiki/Folksonomy> (accessed 23 November 2007).

<sup>11</sup>[http://en.wikipedia.org/wiki/Web\\_2](http://en.wikipedia.org/wiki/Web_2) (accessed 9 November 2007).

<sup>12</sup>Tim O'Reilly "What Is Web 2.0: Design Patterns and Business Models for the Next Generation of Software," <http://www.oreillynet.com/pub/a/oreilly/tim/news/2005/09/30/what-is-web-20.html> (posted 09/30/2005) and Cass R. Sunstein, "A Brave New Wikiworld." *The Washington Post*, February 24, 2007, Page A19 (<http://www.washingtonpost.com/wp-dyn/content/article/2007/02/23/AR2007022301596.html>).

Imagine a collection of digital document images; the raw materials of history. If you can think of it as the starting point for an electronic documentary edition, you can imagine the genius of Web 2.0.

I am an archivist, passionate about access to primary sources. This passion is shared by many of you, but the archivist's perspective is from the general, or the whole, to the particular. Archivists understand, appraise, accession, process, and preserve entire aggregates of historical documents, collections or record series. Archivists haven't the luxury to describe each document in detail, but instead aggregate archival components, treating a file or a group of files as a unit.

Some 10 years ago, as I began to think about delivering collections online, this perspective informed my view of how to do it. Instead of item level description, I imagined groups of items as a descriptive unit. The images of each page in a document and each document in the file are assembled with only enough metadata to support navigation. It allows users to behave as if in the reading room: browsing a hard copy file in front of them.<sup>13</sup>

I began to think of minimum metadata not as minimum at all, but as *extensible*. It is possible for the archives to add more detail as it becomes known. Or, better still, *to allow users* to add descriptive data about each document. These are among the principles that now drive Web 2.0, found in such tools and concepts as *folksonomies*, *Flickr*, or *Wikipedia*. Yochai Benkler's works,<sup>14</sup> including his new book, *The Wealth of Networks*<sup>15</sup> with its sophisticated argument for why this brave new world is not just a techno-dream, makes the case for why it amounts to a fundamental shift in the information economy and the social-political climate.

Online collaboration among a large, open, virtual community of intelligent and interested individuals can accomplish more and produce better products than what is produced in a closed shop. The wisdom of the masses expresses a very democratic ideal. The open source software movement grows out of this understanding. Benkler gives a dozen examples illustrating why it works. And it can work for archives who recruit volunteers—genealo-

<sup>13</sup>Max J. Evans, "Archives of the People, by the People, for the People." *American Archivist* 70 (Fall/Winter 2007).

<sup>14</sup>Yochai Benkler, "Coase's Penguin, or Linux and the Nature of the Firm." *Yale Law Journal* 112 (New Haven: Yale University Press, 2006), 369–446.

<sup>15</sup>Benkler, *The Wealth of Networks: How Social Production Transforms Markets and Freedom* (New Haven: Yale University Press, 2006).

gists, perhaps—to work online indexing historical records. See for example the Genealogical Society of Utah’s familysearch indexing site.<sup>16</sup>

The question is will it work in the field of documentary editing? Perhaps. Let me explore some possibilities with you.

This brief story may help. A year ago I joined NHPRC Commissioners Charles Cullen and Kevin Graffagnino at Monticello to learn about the content management and publishing software used by the Jefferson Retirement Series project. While introducing the product, project director Jefferson Looney remarked that this will be the *sixth* version of the Jefferson Papers, but he is determined to make it the last.

I listened with quiet skepticism, certain that each of the former editors brought the same conviction to the task. But surely, I thought, new documents will be discovered and future scholarship will cast new light on the meaning of the documents.

Later, however, Jeff made it clear that their system makes it possible to effectively manage the project, while it opens the possibility for seamless incorporation of new interpretations into the text, precisely because it is published online. What he meant is that *it will be redone*, but as part of a continuing, dynamic, and collaborative online process.

Imagine incorporating these principles into your work *now*. Web-based publications management software facilitates collaboration during the initial production stages, making it possible for scholars throughout the world to become part of documentary editing projects. In this scenario, the editor-in-chief assigns documents—for transcription, editing, proofreading, and annotation—just as the editor does now, but in a virtual community. This web tool can promote collaboration among related projects; for example, the Founding Fathers projects could share among themselves the work being done by each, including transcripts, annotations, and biographical and geographic authority files.

Let me be clear: this is *not* a Wikipedia approach, built upon what is perceived as uncontrolled submissions from anonymous contributors.<sup>17</sup> No, I envision a system where contributors are credentialed and authorized and where their work is vetted by experts. One of Wikipedia’s founders has launched a new, competing enterprise, Citizendium, a citizens’ compendium

<sup>16</sup><http://www.familysearchindexing.org> (accessed 23 November 2007).

<sup>17</sup>This perception is not entirely accurate. It ignores Wikipedia’s internal controls, including a contributor registration requirement. See a critique, “Now Let’s Bury the Myth” at Nichols Carr’s Blog, [http://www.roughlytype.com/archives/2006/05/now\\_lets\\_bury\\_t.php](http://www.roughlytype.com/archives/2006/05/now_lets_bury_t.php).



of everything, “an open wiki project aimed at creating an enormous, free, and *reliable* encyclopedia” based on the model just described.<sup>18</sup>

### **Implications for Documentary Editors**

Documentary editors might benefit from similar approaches. Working with limited sets of records, they can impose strict standards and control the size and makeup of their communities. Imagine editorial projects that use the Web to distribute document images to others, domestic and offshore, for the first round of transcribing and markup. The resulting copy goes to an editor for proofreading, correction, and polish, and then to other editors for oral proofreading. Nothing new here, except that much of this work might be done outside the projects’ offices. It could be done by contractors; faculty members or graduate students at distant universities; scholars for whom mobility presents major challenges; or stay-at-home dads or moms. The editor would recruit and manage a wide variety of people, many part-time, and ensure that tasks are completed correctly.

Editors add their scholarly touch with headnotes and annotations. This, too, may be a task for scholars in a virtual community. Freelance historians might contribute their expertise in a particular field of study, say the American Revolution, to each of the dozen projects with papers covering that period.

These contributors need not be employees—or even have advanced degrees. As in the open source software world, it can operate as a meritocracy. For example, a meticulous amateur historian who knows all about some obscure topic may be just the one to contribute an annotation that would otherwise be difficult if not impossible to construct.

By publishing early versions online (think *Beta*) and inviting comments and suggestions, projects may identify the inevitable errors that creep into any work. If a fresh set of eyeballs helps to root out these errors, why not use a thousand, or ten thousand? Of course editors now routinely invite others into the process, but only as readers just short of going to the presses. I suggest instead that involving your readers early will make them active participants who develop a sense of ownership and engender support for your work.

<sup>18</sup>Richard Waters, “Wikipedia Founder Plans Rival,” *Financial Times*, October 16 2006, Last updated: 16 October 2006 <http://www.ft.com/cms/s/e62ce8a4-5d3e-11db-9d15-0000779e2340.html> (accessed 23 November 2007). See the *Citizendium* beta at [http://en.citizendium.org/wiki/Main\\_Page](http://en.citizendium.org/wiki/Main_Page) (accessed 23 November 2007). Emphasis mine.

Finally, we fool ourselves when we think there is finality. In this wiki-like model, there is no “final” set of documents, no “final” documentary edition. Online transcribed, edited, and annotated documents encourage users to comment, question, and use the documents as catalysts for debate and study. In the end, this community-based content adds value to the scholarly work of the editors. A new generation of archivists and scholars will find sources to support new historical works years after the volumes are published. The ongoing process of social coding might help open old documents to a new understanding. Thoughtful uses of folksonomies may lead to enriched sets of expanded access (index) terms. Moderated discussion may lead to deeper understanding and new insights into the meaning of documents, based on newly discovered sources or new historiographical methods.

What I am proposing is not radical, really. Most encyclopedias use similar models. Indeed, one of the most famous, the *Oxford English Dictionary*, relied on volunteers throughout the English speaking world, including, it turns out, a madman! An American, a Civil War doctor, was convicted of murder by reason of insanity for killing a member of the English working class and held in an English asylum.<sup>19</sup> However, as the old joke goes, he was crazy, not stupid, and became one of the OED’s most productive contributors.

Documentary editors will have to invent or adapt web-based methods to support collaboration. I’ve described one model, based on traditional documentary editing methods, that adds to existing processes opportunities for collaboration. I can imagine, in addition, opportunities to collaborate with the many archives that hold the documents you publish, using, perhaps, a “mashup,” “a web application that combines data from more than one source into a single integrated tool ....”<sup>20</sup> You could build upon the finding aids and digital images archivists create and they could incorporate your work into their descriptive systems. Everyone benefits, especially the ultimate users.

I’ve suggested some departures from your current practices, but hope that you will take these suggestions seriously. At least consider a web-based

<sup>19</sup>Winchester, Simon, *The Professor and The Madman: A Tale of Murder, Insanity, and the Making of the Oxford English Dictionary* (Thorndike, Maine: G.K. Hall, 1999); see also Winchester’s *The Meaning of Everything: The Story of the Oxford English Dictionary* (New York: Oxford University Press, 2003).

<sup>20</sup>[http://en.wikipedia.org/wiki/Mashup\\_\(web\\_application\\_hybrid\)](http://en.wikipedia.org/wiki/Mashup_(web_application_hybrid)) (accessed 27 November 2007).

content management system to help you effectively manage your project and produce, from a single markup, electronic files for both the print edition and the online. Such a system should facilitate inviting contributors to your projects and managing their work.

Change should not be undertaken lightly or without anticipating potential consequences. However, community-based peer production is a powerful concept, not only as an economic model, but also as a social movement that is likely to continue whether or not documentary editors embrace it. However, as active partners, you can ignite a firestorm of interest in your work and promote using documents in education. Putting the people in touch with and encouraging them to interact with primary sources will result in deepening society's understanding of our rich and textured history.

In the end, and most importantly, it will mean that we can achieve Jefferson's goal: Writing about documents that "cannot be recovered" from the loss of war, he pleaded that we "save what remains; not by vaults and locks which fence them from the public eye ..., but by such a multiplication of copies, as shall place them beyond the reach of accident."<sup>21</sup> I think he would approve of the use of this 21st century tool, the World Wide Web, to multiply copies and to turn them loose for the public to see and use.

<sup>21</sup>Letter, Thomas Jefferson to Ebenezer Hazard, Philadelphia, February 18, 1791, *The Papers of Thomas Jefferson*, Julian P. Boyd, Ed. (Princeton: Princeton University Press, 1974), Vol. 19, p. 287.