

## *Preparation of Historical Scholarly Editions*

This outline of steps simplifies a process that has evolved over time and in relation to the particular nature of the materials being collected and prepared for transcription and publication. Documentary editing projects have traditionally focused on preparing print editions; but nearly all the editorial work for print editions is equally applicable to digital editions. Today, some projects are applying techniques (e.g., XML markup) that may facilitate both online and print publication; other projects plan to publish exclusively online. Depending on staffing and work plans, a project may complete tasks (such as document collection) sequentially or concurrently, as editors may tackle more than one task at the same time.

### *Project Methods and Scope*

Documentary editors must first decide on what will be included and excluded in an edition. Some, like most of the Founders editions, are quite comprehensive; others are more selective, including only documents that reveal important biographical, historical, or social details.

### *Document Collection*

Historians search for the sources to be included in the edition, often by querying many archives and historians, as well as relying on earlier, often partial, compilations. Most projects acquire paper copies or scanned images of more documents than they plan to publish. During a search for documents, it is occasionally difficult to assess the importance of each document. Documents whose significance does not justify inclusion in a scholarly edition may facilitate the search for additional documents, or may provide necessary information for annotation.

### *Control files*

As documents are collected, editors enter them into a control file; either an electronic database or paper-based system that tracks basic information about each document such as writer, recipient, date, location, archival repository, etc. The Adams Papers refers to its control file as a “slip file”. More elaborate content management systems enable editors to track the editorial work flow (transcription, proofreading, markup, etc.) and systematize the research for, and drafting of, annotation. These systems may allow editors to access the project’s resources, including lists of documents, facsimiles, transcriptions, research findings, and other information, over the Internet.

### *Transcription*

Preparing an authoritative transcription of the documents is one of the most precise parts of historical editing since the profession presumes that most users will not see the original documents or, even if they could, have the abilities and resources to understand the references, handwriting, and context of the letter.

*Transcription:* Often takes place in stages, whereby a scholar or experienced transcriber first prepares a rough version of the manuscript. While the transcription is as literal as possible, words that cannot be read are indicated by brackets for further work.

Subsequently, another scholar studies the manuscript and transcript and adds additional transcription for difficult sections.

*Verification:* one individual does a character-per-character check of the document transcription against a manuscript version of the document (this could be a photocopy, digital facsimile, or the original manuscript).

*Oral proofreading:* two individuals work as a team, with one reading from the manuscript version of the document (this could be a photocopy, digital facsimile, or the original manuscript), while the second listens and marks corrections on paper in the transcription. This is called “collation” at the Adams Papers project. This is a further check that the transcription is accurate.

#### *Annotation*

Editors place documents in historical context so that readers may understand them more fully. The style and amount of information varies by project, but generally includes the location and physical condition of the original copy, explanations of textual idiosyncrasies such as text inserted between the lines, words apparently misspelled, deleted text that might be of interest, and variant hands (handwriting from two different people). Annotation may also explain variations between different versions of a text (the difference, for example, between the letter that was sent and the copy that was retained). Annotation often includes biographical information about correspondents or persons mentioned in documents, and may also clarify references to events, define archaic terms, give the sources of literary quotations, or provide information about references to newspaper articles, or names of places, organizations, or ships.

#### *Editorial apparatus*

Most documentary editions include such front matter as a table of contents; foreword, preface, or introduction; chronology; statement of editorial style; list of repository abbreviations; list of short titles; and list of illustration captions, where applicable.

#### *Volume illustrations and permissions*

Editors must determine how many illustrations to include, and obtain permissions to publish and compose captions for those that are to be reproduced in an edition.

#### *Preparing Text for Publishers*

Some projects do all the typesetting for their editions. This includes establishing page breaks and line-endings, formatting of all text, and the placement of illustrations, among other tasks. Others simply submit electronic files according to relatively basic instructions from the publishers.

#### *Page proofs character-per-character proofread*

Two individuals work as a team, with one holding and reading from the copy text while the second follows along in the page proofs. The entire volume is read word-for-word including all front matter. Corrections made to page proofs are returned to the press. This process is repeated until the page proofs are error-free.

#### *Index*

Preparation of an index is a crucial step. Depending on the indexing software used by the projects, this step may wait until the page proofs are returned from the publisher, or it begin earlier. Multi-volume editions must also resolve issues regarding indexing consistently across volumes and within series.