



# *The Association for Documentary Editing*

## *e-newsletter*

*Fall / Winter 2010-2011*

## **President's Letter**

To all ADE Members:

February 8, 2011

I am honored to step into the role of President of ADE, and I look forward to the year ahead and the opportunity to work with all of the members, new and ongoing (none of us get old--we just keep going!). Our meeting in Philadelphia attracted a good number of ADE members—132 to be exact. The papers and location were stimulating and engaging by all accounts. We were graciously received by the American Philosophical Society and The Library Company, and ADE received very generous support from a great many sponsors. They included: Princeton University Press, American Philosophical Society, The McNeil Center for Early American Studies, The Papers of Thomas Jefferson, Papers of Elizabeth Cady Stanton and Susan B. Anthony, The Thomas Edison Papers, Library Company of Philadelphia, and the University of Virginia Press.

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We're looking forward to heading west for the ADE meeting in Salt Lake City, October 20-22, 2011. President-elect Carol DeBoer-Langworthy will be in charge of the program committee and has sent out a call for papers that is included in this newsletter. If you have any questions or suggestions, you can contact her at [carol\\_deboer-langworthy@brown.edu](mailto:carol_deboer-langworthy@brown.edu).

Looking to the horizon we expect a difficult year for funding agencies. Involvement in this month's National Humanities Alliance Humanities Advocacy Day, March 7-8, 2011 at the George Washington University Marvin Center and Capitol Hill in Washington was especially critical. The ADE sponsored this event and several documentary editors were in attendance to speak on behalf of their projects and documentary editing in general.

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This year will mark some important transitions for the ADE. We will see the last print volume of *Documentary Editing* (volume 32), to be followed by the first online issue of the renamed *Scholarly Editing: The Annual of the Association for Documentary Editing* (volume 33). We will also see important changes for Camp Edit of which more to come! I encourage everyone reading this letter to get involved, whether on a committee, by submitting a paper proposal for the next annual meeting, or contributing something to this E-newsletter. I hope you will feel free to contact me by email directly at [ssh8a@virginia.edu](mailto:ssh8a@virginia.edu) if you have any questions, concerns, or ideas. I'm happy to talk with you.

Sue Holbrook Perdue

## ADE News

### Call for Papers, ADE 2011

The Association for Documentary Editing invites proposals for papers, roundtables, and/or panels for the organization's 33rd national meeting in Salt Lake City, Utah, 20-22 October 2011. With the theme, "On the Frontiers of Documentary Editing," this year's meeting will be held in Salt Lake City's downtown Marriott Hotel, hosted by the Joseph Smith Papers Project. This is ADE's last autumn conference; subsequent annual meetings will coincide with a summer editing institute.

The ADE Program Committee hopes that prospective presenters will interpret our theme as widely as possible, to include methodological "frontiers" as well as chronological or spatial frontiers such as the American West. We also encourage submissions from solo editor projects and from those in early stages of organization.

Abstracts of maximum 500 words are due by **1 April 2011**. In a separate paragraph state your name, address, telephone number, email and project, organizational, or institutional affiliation, if any. Please send abstracts within the body of an email **and** as an attached Word document to:

Carol DeBoer-Langworthy, Ph.D.  
Chair, ADE Program Committee  
Department of English  
Brown University  
Providence, RI 02912  
[carol\\_deboer-langworthy@brown.edu](mailto:carol_deboer-langworthy@brown.edu)

#### Save the Date

The NHPRC will fund a workshop for experienced editors on digitizing print editions just before the ADE annual meeting. Enrollment will be limited to 12 people. It will be taught by Syd Bauman and Julia Flanders, from the Brown Women Writers Project. More information and applications will be available soon, see <http://documentaryediting.org/meeting/index.html>

MAKE PLANS TO ATTEND THE  
2011 ADE ANNUAL MEETING IN  
**SALT LAKE CITY**

OCTOBER 20-22, 2011

Indulge in the City

Home of the 2002 Winter Olympics, SLC is a stunning city with exciting and unique attractions, a vibrant night life, and internationally acclaimed restaurants and shopping.



Photo Credit: Eric Schramm

Come and experience:

- 10-minute drive to SLC International Airport
- National Historic Sites
- Utah Jazz - NBA
- Real Salt Lake - Major League Soccer
- 2002 Olympic Venues
- Over 140 Restaurants, Bars, and Pubs
- Bonneville Salt Flats



Photo Credit: Steve Greenwood

See the Beauty of Utah

SLC is within a 20-minute drive to unbelievable outdoor activities, world-class resorts, and exclusive and chic boutiques.

Explore:

- Beautiful hikes and drives through colorful canyons
- 4 Nearby Ski Resorts
- Park City's Historic Main Street Shopping District



Photo Credit: Eric Schramm

## ADE Liaisons

Liaisons are responsible for facilitating communication with other professional organizations with related interests and with any of their members whose interests could be served by a closer relationship with ADE. Thanks to the work of 25 ADE volunteers, we have a liaison for 35 other professional organizations. Four new liaisons stepped forward to help as a result of the last ADE meeting in Philadelphia. Liaisons are actively communicating activities and events of other associations, distributing our new ADE brochures at other professional conferences, and relaying information about the ADE to other listservs and newsletters. Watch the ADE Web site as we update information on these activities.

There is always room for more, so if interested, or to inquire if your other member organizations are represented, contact the coordinator, Martha King ([mjking@princeton.edu](mailto:mjking@princeton.edu)).

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## Scholarly Editing

As we work to re-invent Documentary Editing as Scholarly Editing: The Annual of the Association for Documentary Editing, we are seeking to expand our list of reviewers. The journal will publish short digital editions and essays on the theory and practice of editing, and we would like to know if you would be interested in serving as a peer reviewer.

We are now gathering reviewers in two categories:

1. Peer reviewers of digital editions (reviewers will read the edition in its web interface; no special technical skills required)
2. Peer reviewers of essays on the theory and practice of scholarly editing

If you are interested, please send an email to Andrew Jewell ([ajewell@unlnotes.unl.edu](mailto:ajewell@unlnotes.unl.edu)) and Amanda Gailey ([agailey2@unlnotes.unl.edu](mailto:agailey2@unlnotes.unl.edu)) with the following information:

1. Name
2. Email address
3. Institutional or Project affiliation
4. Type of reviewing you are willing to do (edition or essay or both)
5. Field(s) of expertise

We look forward to hearing from you.

Thanks,  
Amanda Gailey and Andrew Jewell  
co-editors, Scholarly Editing

# Scholarly Editing

The Annual of the Association for Documentary Editing  
Editors, Amanda Gailey & Andrew Jewell

This site is the future home of the open-access, digital journal *Scholarly Editing*. Currently we are accepting submissions for short-form scholarly editions and essays about the theory and practice of scholarly editing. Please see the full call below.



<http://scholarlyediting.org/>

## Membership

A Note from the ADE President

As you prepare to renew your ADE membership, please take a moment to reflect on the importance of ADE to your working life. Wouldn't it be great if we could achieve 100% participation with our entire membership? No gift is too small, or of course, too big. On behalf of ADE, I ask you to consider making a contribution now, either as a direct donation or by upgrading your membership. Thank you for your donation that will help keep ADE vibrant and strong.

Sincerely,  
Sue Perdue

To renew your membership online, please visit: <http://documentaryediting.org/membership/index.html>

To renew your membership through the mail, please print, fill out, and mail the form ([.doc](#) | [.pdf](#)) to:

Jennifer Stertz, ADE Secretary  
The Papers of George Washington, University of Virginia  
504 Alderman Library, Box 400117  
Charlottesville, VA 22904-4117

To make a donation, please visit: <http://documentaryediting.org/donation.html>

If you have any questions, please don't hesitate to contact me.

Thanks - Jennifer Stertz, ADE Secretary [jes7z@virginia.edu](mailto:jes7z@virginia.edu)

## Project News

### *The Life and Times of Frederick Douglass*

On 3 January 2011, the Committee on Scholarly Editions (CSE) awarded the CSE seal to *Life and Times of Frederick Douglass*, edited by Joseph McElrath, to be published by Yale University Press ([yalepress.yale.edu](http://yalepress.yale.edu)).

The CSE serves as a clearinghouse for information about scholarly editing and editorial projects, offers advice and consultation to editors on request, honors excellence in editing by awarding emblems to qualified volumes, and promotes dissemination of reliable texts for classroom use and among general readers. Editors or publishers who wish to submit their editions (preferably before or at the copyediting stage) for consideration for the CSE seal should contact David G. Nicholls, staff liaison to the committee, at [cse@mla.org](mailto:cse@mla.org).

### *The Almanacks of Mary Moody Emerson*

*The Almanacks of Mary Moody Emerson: A Scholarly Digital Edition*, co-edited by Noelle Baker and Sandy Petrulionis and in collaboration with Brown Women Writers Project, was recently awarded a Scholarly Editions grant from the National Endowment for the Humanities, and has also been designated an NEH "We the People" project.

### Holley School Histories Oral History Project

The Holley School Histories oral history project has been awarded a \$4000 grant (for travel and transcription costs) from the Virginia Foundation for the Humanities

### *Andrew Jackson Papers*

Mark Cheatham writes: For those interested in a sneak peek of the new Papers of Andrew Jackson, volume, I posted an interview with Dr. Laura-Eve Moss, associate editor of the project, on my blog:

<http://mcheatham.wordpress.com/2010/11/01/interview-with-laura-eve-moss-associate-editor-of-the-papers-of-andrew-jackson/>.

A PBS "History Detectives" segment that aired July 5, 2009, centered on the authentication by the staff of *The Papers of Andrew Jackson* of an 1835 letter threatening Jackson's assassination and signed by Junius Brutus Booth, John Wilkes Booth's father. Booth's signature had long been assumed by historians to be an alias, but the Jackson staff, corroborated by a handwriting expert at the Folger Shakespeare Library, proved it to be authentic. The episode (Season 7, episode 3) is viewable online at <http://video.pbs.org/video/1169415042>. This piece of historical detection was the subject of a panel at the Society of American Archivists meeting in Washington in August 2010 and an article in the January/February 2011 issue of *Archival Outlook*.

## New Projects

### American Colony in Jerusalem Collection

At the end of December 2010 the Library of Congress launched a new electronic documentary edition of selected manuscripts and photographs from the American Colony in Jerusalem collection. This electronic edition is available as an American Memory web presentation,

*Continued on page 7*

with content edited and framework written by Barbara Bair. The site at launch represents a foundation to which more documents and features will be added over 2011-2013, as scanning of the collection proceeds and more documents go up in future updates. A press release describing the launch can be found at <http://www.loc.gov/today/pr/2010/10-271.html> and the home page of the American Colony documentary web site itself is at <http://memory.loc.gov/ammem/collections/americancolony/>. The site supplements an earlier web presentation of a Library of Congress exhibition of the same name. The American Colony in Jerusalem was founded by a group of Christian expatriates from the Chicago area in 1881. It developed into a multi-ethnic settlement house in the waning days of the Ottoman Empire, and its leading members became important players in social reform, social services, tourism and business enterprise in Jerusalem during World War I and the British Mandate.

## American Naval Records Society

Founded in December 2010, ANRS models itself on the Navy Records Society, a British organization dedicated since its founding in 1893 to the publishing of documents relating to the history of the Royal Navy. With David W. McComb as guiding spirit and executive director, and an advisory group consisting of Patrick W. Clancey, Michael J. Crawford, William S. Dudley, John B. Hattendorf, Wayne E. Lee, Susan H. Perdue, Holly C. Shulman, ANRS operates thanks exclusively to contributions of time and effort by many people and server space kindly made available by the University of North Carolina at Chapel Hill.

ANRS's inaugural efforts have been to publish in electronic form on its website, [www.navalrecords.org](http://www.navalrecords.org), selected government publications in the public domain and other documentary sources not under copyright. Many of these documents are drawn from the publications of the Naval War College and the Naval History and Heritage Command (and its predecessor offices). These cover the sweep of U.S. naval history from the 1790 to the 1990s, from *Naval Documents Related to the United States Wars with the Barbary Powers* to official U.S. Navy strategy planning documents from the 1970s, 1980s, and 1990s. The society's intention is to serve not only as a site for making conveniently available works already published in book form, but also as a site where newly edited document collections relating the American naval history can be originally published and made accessible to all.

Michael J. Crawford

<http://www.ibiblio.org/anrs/>

AMERICAN NAVAL RECORDS SOCIETY  
ANRS Home Page

HOME | WHAT'S NEW | SUBJECT | CHRONOLOGICAL | A-Z | ABOUT US | SEARCH

**Home**  
What's New  
Subject Index  
Chronological Index  
A-Z Index  
About Us

**The American Naval Records Society (ANRS)** was founded in December 2010. Its mission is to foster the expansion of research into, writing about and teaching of American naval history through the publication of documentary sources. The model for the ANRS has been the British [Navy Records Society](#), which was established in 1893 for the purpose of printing unpublished manuscripts and rare works of naval interest.

**The ANRS collection**

The initial effort of the ANRS has been to publish—in electronic form—selected government publications in the public domain and other documentary sources not under copyright. These are available as Adobe Acrobat (PDF) files linked from indices on this site as follows: [What's New](#), [Subject Index](#), [Chronological Index](#) and [Alphabetical Index](#). Adobe Acrobat or Adobe Reader 9.0 or later are required view the PDF files.

**Other sources of naval records**

- A state-by-state listing of local sources of naval history is maintained by the [Naval History & Heritage Command](#)
- [Department of the Navy Documents in Record Groups \(RG\) at the National Archives and Records Administration \(NARA\)](#)

## Member News

David Greetham wrote the introduction to Daniel Abrams' book on *Kabbalistic Manuscripts and Textual Theory* (Jerusalem: Hebrew University Press/Magnes Press), 2010 and an introduction ("Begin Again. . . Stop!") to Danis Rose and John O'Hanlon's new edition of James Joyce, *Finnegans Wake*, The Dublin Edition. Houyhnhm Press, 2010. His new book, *The Pleasures of Contamination: Evidence, Text, and Voice in Textual Studies* was published in September by Indiana UP, the inaugural volume in a new series of textual studies under the general editorship of H. Wayne Storey.

On January 6, the Charles Sumner School in Washington, D.C. celebrated the bicentennial of his birth. Beverly Palmer spoke along with several others. On February 17, Beverly gave a lecture on Sumner, "To place the Federal Government on the Side of Freedom," at the Massachusetts Historical Society, drawing on Sumner's letters from the MHS collections that were published in her edition of the *Selected Letters of Charles Sumner*.

Daniel W. Stowell and the Papers of Abraham Lincoln digital project were featured in an article in the November 16, 2010 New York Times, "Digital Keys for Unlocking the Humanities' Riches" about the unexpected ways scholars and others are using the material.

[http://www.nytimes.com/2010/11/17/arts/17digital.html?\\_r=1&hp](http://www.nytimes.com/2010/11/17/arts/17digital.html?_r=1&hp)

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## Fellowships and Funding

The Cody Institute for Western American Studies (CIWAS), at the Buffalo Bill Historical Center in Cody, Wyoming, invites proposals for its 2011 Resident Fellowship Program. Fellowships are intended to fund research in humanities and/or natural science pertaining to the American West and thereby include an award up to \$5,000 and a residency requirement between two to four weeks dependent upon the parameters of the fellow's research needs. The period of residency must be completed between June 1, 2011 and May 31, 2012. A maximum of four fellowships will be awarded in 2011-12.

Fellows may pursue research in the collections of the Buffalo Bill Historical Center: McCracken Research Library, Buffalo Bill Museum, Whitney Gallery of Western Art, Plains Indian Museum, Cody Firearms Museum, or Draper Museum of Natural History. Fellows may also conduct field research in association with ongoing studies conducted by Center curatorial staff in the Greater Yellowstone region. Deadline April 1, 2011.

Linda S. Clark  
Fellowship Manager  
Cody Institute for Western American Studies (CIWAS)  
Buffalo Bill Historical Center  
720 Sheridan Avenue  
Cody, Wyoming 82414  
307-587-2526  
[lindac@bbhc.org](mailto:lindac@bbhc.org)  
<http://www.bbhc.org/ciwas/>



## Publications

### ***The Works of Elizabeth Barrett Browning***

Edited by Sandra Donaldson. Volume Editors include Rita Patteson, Marjorie Stone, and Beverly Taylor. Associate Editors are Simon Avery, Melissa Brotton, Cynthia Burgess, Clara Drummond, Barbara Neri, and Elizabeth Woodworth. The Editorial Associate is Jane Stewart Laux, Pickering & Chatto, 2011.

Surprisingly, no scholarly edition of the works of this significant 19th century poet and social activist has been published in over a century. The five-volume edition was partially funded by grants from the National Endowment for the Humanities.

### ***Class Lectures of John Dewey: Volume 1***

Edited by Donald F. Koch and The Center for Dewey Studies, Southern Illinois University at Carbondale.

The Center for Dewey Studies is pleased to announce the publication of *Class Lectures of John Dewey: Volume 1*. This volume includes more than 2,700 pages of material from 1885 to 1903 that covers the subjects political philosophy, logic, ethics, and sociology. Dewey's class lectures provide a unique opportunity for scholars to follow the evolution of his philosophy over time in the give and take of a classroom setting.

The class lectures offer their readers unprecedented access to Dewey's interchanges with his students. Some lecture sets include extensive question-and-answer sessions that present an unedited Dewey in the process of thinking through issues with his students. They also reveal the background and context of his thinking in ways that tended to drop out of his published work. *Class Lectures of John Dewey: Volume 1* is available through the IntelLex Corporation, Char-

lottesville, Va. <http://www.nlx.com/collections/147>

*The Early Works of John Dewey, 1882-1898*, Chinese translation, edited at the Center for Dewey Studies, has just been published in Chinese translation by East China Normal Press. The remaining thirty-two volumes are scheduled for publication in 2012.

### ***The Papers of Andrew Jackson, Volume 8: 1830***

Edited by Daniel Feller, Thomas Coens, and Laura-Eve Moss, The University of Tennessee Press, 2011.

This eighth volume of Andrew Jackson's papers presents more than five hundred documents, many appearing here for the first time, from a core year in Jackson's tumultuous presidency. They include Jackson's handwritten drafts of his presidential messages, private notes and memoranda, and correspondence with government officials, Army and Navy officers, friends and family, Indian leaders, foreign diplomats, and ordinary citizens throughout the country.

### ***New England to Gold Rush California: The Journal of Alfred and Chastina W. Rix, 1849-1854***

Edited by Lynn A. Bonfield, University of Oklahoma Press, 2011.

*New England to Gold rush California* is the joint journal of Alfred and Chastina W. Rix, Vermont schoolteachers. When the Rixes began their journal, abolition, temperance, and the westward movement dominated New England culture and politics. Stricken with "gold fever," Alfred headed to California, while Chastina

stayed behind. Alone with their young son in Vermont, Chastina continued the journal, describing her loneliness and fatigue as she labored to maintain the household, and summarizing Alfred's frequent letters. After establishing himself economically in San Francisco, Alfred urged his wife to join him. Chastina and their two-year-old son traveled by ship, via Panama, to California, where the couple resumed their journal, continuing the pattern of alternating entries and detailing life in the burgeoning city. Alfred's concluding notes at the end of the journal are an abrupt reminder that, just as now, life in the middle of the nineteenth century could bring unexpected and personal tragedy.

## Digital Resources

### Databases

#### Writings of James Fenimore Cooper

The website of the "Writings of James Fenimore Cooper" is [www.wjfc.org](http://www.wjfc.org). The site contains information on already published texts and works in progress, as well as digital files of all of Cooper's hard-to-find occasional publications.

#### The New York Society Library's First Charging Ledger

The New York Society Library's First Charging Ledger (1789-1792) database has gone live. Library's earliest surviving charging ledger, which records borrowing activity during the period between July 1789 and April 1792, is a window into the reading habits of over five hundred members of the Society Library, many of whom were prominent New Yorkers during these early years of our nation. During the time when the Library shared a roof with the early government in Federal Hall, borrowing privileges were also extended to the President, Vice President, and Con-

gress. For a brief time, their borrowing activity was also recorded in this volume. Other early borrowers also included many lawyers, judges, physicians, clergymen, publishers, and merchants. Members included Livingstons, John Jay, John Adams, George Washington, and Aaron Burr.

<http://www.nysoclib.org/ledger/index.html>

### Blogs

John Carland, Senior Historian and Conference Coordinator and Program Committee Chair, Conference on the American Experience in Southeast Asia, in the Office of the Historian of the Department of State, has several blogs. The first blog contains a précis of the four last documentary histories on Vietnam the office has published (one in hardback, all four online, and all will be out in hardback in the near future) and shows how they hang together to tell the policy story. The website contains a potpourri of material about the conference. We have put up video and transcript of Secretary Clinton's speech as well as speeches of Henry Kissinger, Richard Holbrooke, a media panel on which we had Morley Safer and Marvin Kalb, and, sometimes today, John Negroponte's September 30 speech to the conference. The rest of the conference will be put online as we transcribe the sessions. As you will see from the second blog—about the origins and concept of the conference we held on September 29-30 at the State Department—the fact that we were close to completing our documentary history series on Indochina/Vietnam provided the occasion for the conference, which examined American policy during the war. The third is simply a link to the Vietnam War conference website.

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[http://blogs.state.gov/index.php/site/entry/frus\\_volumes\\_vietnam](http://blogs.state.gov/index.php/site/entry/frus_volumes_vietnam)  
[http://blogs.state.gov/index.php/site/entry/last\\_words\\_southeast\\_asia\\_conference](http://blogs.state.gov/index.php/site/entry/last_words_southeast_asia_conference)  
<http://history.state.gov/conferences/2010-southeast-asia/videos-transcripts>

## Special Features

### Advocacy

History Repeats Itself  
Charlene Bickford

As 2011 began a funding crisis for federal programs that support documentary editing (the NEH and the NHPRC), even more ominous than the crisis of 30 years earlier, was developing. All ADE members, our colleagues, and allies need to take notice and actively participate in the advocacy effort.

As I write this article, we are both preparing for the 2011 Humanities Advocacy Day and attempting to have some positive impact on the FY'11 funding situation for the NHPRC and the NEH. The new Republican majority in the House of Representatives, spurred on by a large number of newly-elected "Tea Party" supported Members, has pushed for major spending cuts in FY'11, a fiscal year that is already approaching the halfway mark. The House version of the FY'11 omnibus appropriations bill (HR1) would reduce the funding for the NHPRC's grants program to \$4 million—a return to the FY1979 funding level! This figure would cut the NHPRC's appropriation by 60% from the \$10 million figure requested by the Obama Administration for FY'11 and passed by the Appropriations Committees in both houses. FY'11 NEH funding also sustained a significant cut (\$22 million, or 13.9%) in the House bill. After passage of HR1 on February 18 and the one week President's Day recess, the action shifted to the Senate and at this point negotiations are going on to extend the temporary continuing resolution to fund the Federal Government for two more weeks and avert a shutdown.

The Administration's FY'12 proposed budget requests only \$5 million for the NHPRC. Representatives of the NHPRC's constituent groups discussed strategies for both the FY'11 and the FY'12 battles and determined that we needed to compromise some and support a FY'11 figure that was lower than \$10 million. Thus we settled on an "ask" figure of \$8 million, which would maintain ongoing programs. Our "ask" for FY'12 would again be \$10 million, as it has been for the past several years.

The Administration requested \$146.3 million for the NEH, \$15 million less than its FY'11 request and a figure that is close to the one passed by the House of Representatives for FY'11 in HR1. The National Humanities Alliance and other NEH advocates will be seeking Congressional support for a figure closer to the FY'10 Administration request of \$161.3 million.

I expect that the ADE will again be the organization with the largest delegation for Humanities Advocacy Day on March 8. ADE members will be visiting Representatives and Senators from Maryland, Massachusetts, Nebraska, New Jersey, Virginia and West Virginia, as well as making up the team that will meet with staff members for the NHPRC's appropriations subcommittees. Since the FY'11 appropriations figures will

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still be undetermined, advocates will be covering both FY'11 and FY'12. Our task is going to be very difficult this year since the new House majority has made promises to both drastically reduce federal budget deficits and chip away at the long term debt. They will do everything they can to deliver on these promises, while also pushing for tax cuts. Even before last November's election, the Obama Administration was doing government wide budget reviews and seeking substantial reductions in spending.

The programs that we are advocating for are not large, but they have been noticed. The NHPRC in particular was targeted for elimination by House Majority Leader Eric Cantor on his "You Cut It" site and Rep. Jason Chaffetz (R-UT) at NHPRC reauthorization hearings in the spring of 2010. This high visibility opposition was a clear sign of things to come.

Thus, 2011 could be a lot like 1981, when we faced the Reagan Administration's zeroing out of the NHPRC's grant program and refusal to support reauthorization, as well as a proposed enormous cut in the NEH's grants funding. We "won" (i.e., the NHPRC and NEH survived at severely reduced levels and made grants in FY1982) that battle by cooperating with our allies, creating our own networks of supporters to take part in the effort, and making many, many personal visits and phone calls, as well as writing letters. It is clear that an even larger effort will be needed in the coming year (s), particularly given the current climate. Every single supporter will need to be part of the advocacy effort.

We must rally our allies and reach out to our supporters. Sign up for *sedit-l* if you have not done so. Watch your email for information, instructions, and organizing tips through *sedit-l* and emails to ADE members. If you do not subscribe to *sedit-l*, please subscribe to the weekly updates from the National Coalition

for History: <http://historycoalition.org/subscribe/>, and updates from the National Humanities Alliance. Pass advocacy alerts on to your departments, institutions, those who have used your work, etc. and follow up with them to make sure that they have acted. We cannot accomplish the goals of saving the NHPRC's grants program and preserving NEH funding without a major effort.

## Article

**Embedded Indexing in an XML environment:  
The Papers of Thomas Jefferson:  
Retirement Series  
Sue Purdue**

### Background

Ask any editor at a documentary editing project that publishes more than one volume what his or her nightmare is, many will respond, the task of creating a cumulative index at the end of the project. At this point, editors fear that they will have lost the zeal of their early years and be faced with the daunting task of melding together in one massive volume, the complex structures of numerous standalone back of the book indexes. Editors and their staffs work hard to keep these structures consistent from volume to volume as they move the edition into the future. Their efforts are made more difficult by the changes in staff, the shifts in historiographical thinking, and the ever expanding content that morphs once small entries to large and unwieldy topics.

The Papers of Thomas Jefferson: Retirement Series, sponsored by the Thomas Jefferson Foundation, Inc., is unique in the fact that it is an offshoot of a long established project, The Papers of Thomas Jefferson at Princeton University that published its first volume in 1950. Because the Jefferson Papers Retirement Series started afresh, as it were, with volume one kicking off Jefferson's retirement from the

presidency in March 1809, we had not gotten too far along in volume indexes when we determined to begin creating a cumulative digital index. From the outset, the assumption had been that the project would create a full cumulative index at the completion of the edition, but we had the opportunity to create it at the start, constantly adding to it as we went.

We prepared the first four back of the book indexes using a dedicated indexing software program CINDEXTM (Indexing Resources). CINDEXTM was developed by indexers and is widely used by professional indexers because it is very nimble and easy to use.<sup>1</sup> It also allows for cumulative indexes. At the completion of each volume, we published the indexes on the Monticello website which we had done by converting the CINDEXTM files to HTML. Cross references and blind entries were hyperlinked, making the index more usable in the electronic environment. Nonetheless, we aimed for something that would leverage the XML environment we had adopted.

### **Objective**

Beginning in 2000, the project has composed its content in an XML-based system that serves the dual purpose of print and digital publication. The tagging scheme was based on the Model Editions Partnership work and TEI compliant. The basic tag set used includes structural elements such as dates, salutations, closings, and name and place tagging. Although TEI has a tag set for indexing ([TEI, auto-generated indexes, section 3.8.2.2](#)) it was not part of our original tagging plan. Early in 2007 we began discussing with our consultant Stephen Perkins of Dataformat, our desire to find an indexing system that would originate electronically. We wanted to:

- 1) Retain the structured alphabetical hierarchy that we published in the back of the book indexes.
- 2) Add to and modify that hierarchy with new content.
- 3) Tie each index entry to its specific location in the document. That is, to mark its beginning point and concluding point and incorporating all of the text in between.
- 4) Create a live cumulative index that would change as the volumes were produced and one that would inform the editorial process, and serve as the intellectual access point and name authority system for all of the content, both in print and electronically.
- 5) Generate one index that works simultaneously for print and digital publication to avoid the redundancy of preparing an index “two ways”: print and digital

We aimed to eliminate dedicated indexing software which required we enter all of the indexing terminology in a separate program and add page numbers. Although index programs are good at alphabetizing and sorting entries and provide a flexible editing environment, they could not verify the page numbers we editors assigned. An embedded indexing structure would provide greater accuracy as the entries would be generated from the pointers we embedded. Embedded indexing is a trade-off between the alphabetical accuracy provided by indexing software on the one hand, and the page range accuracy provided by computer generated page ranges on the other. The real incentive to adopting this system was having a cumulative index that informed our work and that was integrated directly into the documents. We began by preparing a cumulative index of the first four volumes. This required that we work out inconsistencies that arose among the subentries already in place and that we create subentries where there had been no subentries before. We also corrected errata that we discovered. In this way, we quick-

<sup>1</sup> For a thorough review of the available indexing programs on the market as well as freeware, see [American Society for Indexing](#).

ly superseded the back of the book indexes as the cumulative index became the authoritative source file for the volumes. The fact that the cumulative index is out of sync with the standalone volume indexes is an uncomfortable reality at the outset, but ultimately, we realized users were better served with a current cumulative index that reflected the most recent decisions. And each volume's back of the book index is retained.

### **Using the system**

An embedded indexing system can be deployed at any point during content creation; that is, the indexer does not need to wait for page proofs to begin indexing. The association of page breaks--once they are known--with the indexing terms is automated via whatever system is in use. Desktop publishing software such as FrameMaker uses embedded indexing, as well as Microsoft Word, Adobe InDesign, and Quark Xpress. In the case of the Jefferson Papers, the markup language allows for embedded indexing via the tagging structure in XML. Make no mistake, this is not automated indexing, a process that refers to the creation of word concordances. Embedded indexing requires care and precision in the placement of the tags around the target entry. The indexer cannot be vague or uncertain about the start and (more typically) the end point of a subject. Complex documents generate a large number of tags in the document adding layers of tagging to the existing structural and content tags already in place.

The process works like this: editors consult the cumulative index within the content management system. The cumulative index (or CI) is a series of XML files with each index main entry residing as a separate file in the system (there are currently 8,272 main entries). Subentries are listed below each main entry. Editors select an entry by copying a link to that entry which is then pasted into the document they are indexing surrounding the topic with a beginning tag and end tag. (The accompanying screen shot of a document shows the green start tag <IS> and the green end tag <IE>. The related index entry is also displayed as a tool tip at the beginning and end of each index entry). If the cumulative index does not have the appropriate index term(s), editors go about creating a new entry. This may be either a new main entry (new XML file), or a modification of an existing entry. In the latter case, the editor must determine the subentry's correct location in the alphabetical sort.

The project has worked with developer Perkins to build a set of tools and solutions to make the process more user-friendly. A large part of this is enhancing the visual aspects of the tagging system. As noted above, some documents have lots of index tags making it difficult to assess that all of the index tags are in place. All of the index tags that have been embedded in a document are listed at the top of the document (within the metadata, not the document proper). The tags are color coded and the user can jump from the start green <IS> to the end <IE> tag. The user can also turn off the index tags during other phases of work. The staff has built upon the capabilities of the content management system to enable proper alphabetical sorting, especially subentries where alphabetization must take into account sort and non-sort words.

### **Conclusion**

The project has now generated three volume indexes and is in the process of creating a fourth using this system. This indexing system definitely has tradeoffs. It takes significantly longer to produce an embedded index of this type than one of the stand-alone variety like Cindex. Once entries are embedded, it is harder to change them. Placing tags inside the document files makes it possible to introduce errors that can affect the transcriptions at a point when there will be no further systematic review of the documents before they are digitized. Working directly within the environment of the cumulative index also makes one aware of past inconsistencies and redundancies. This can be a positive thing, because some of these

problems can be addressed, but it can also be frustrating, since it is not possible or desirable to smooth out all such problems with every new volume. Overall, the advantages outweigh the drawbacks. The new system makes it much easier to use uniform language and avoid creation of two subentries with very similar wording. The ability to get taken from the index directly to the section under discussion allows for dynamic and very exciting interaction between the index and the material being indexed. Best of all, maintaining and constantly improving the cumulative index enables the editors themselves as well their users to reap the benefits of this work as they go along rather than waiting until the project is complete, and it greatly eases this final, nightmarish task by doing the bulk of the work in stages as publication processes. The embedded indexing system provides not only a cumulative index that evolves with the content, but it provides the staff with a live taxonomy that brings them directly into the content. Index entries are integrated directly into the document and live with that document, in a sense, codifying the accumulated editorial knowledge at the document level.

Screen shot 1: Markup of document, Thomas Jefferson to Charles Blagrove, 27 May 1812, showing all of the tagging. The index tags are green followed by the text of the index entry in green (called a tool-tip). Index tags can be toggled on or off.

<IS> = start of index entry: "Blagrove, Charles: and TJ's land dispute with S. Scott"

The screenshot displays a document editor window with a document titled "DOCUMENT". The main text area shows a letter from Thomas Jefferson to Charles Blagrove, dated May 27, 1812. The text is annotated with various XML tags, including green tags for index entries. Two callout boxes provide definitions for these tags:

- <IS> = start of index entry: "Blagrove, Charles: and TJ's land dispute with S. Scott"** (pointing to a green tag in the text)
- <IE> = end of index entry: "Blagrove, Charles: and TJ's land dispute with S. Scott"** (pointing to a green tag at the end of a paragraph)

The right-hand pane contains an "Attribute Inspector" table and an "Insert Element" section. The "Attribute Inspector" table has columns for "PTJ" and "TEI:2" and rows for "ana", "context", "id", "lang", "n", "next", "prev", and "rend". The "Insert Element" section has a "Used" column and an "All" button. Below the editor is a keyboard layout and a "Rules Checking On" indicator.



Screen shot 2: Cumulative index, main entry for Adams, Abigail Smith (John Adams's wife) with subentries displayed, volume and page numbers that are hyperlinked directly to the document in question.



**Main entry**



View Document



Go to:  <Prev Next>



Title: [CumIndex] Cumulative Index Info 1 Info 2 Show all links



Adams, Abigail Smith (John Adams's wife)  



Adams, Abigail Smith (John Adams's wife); and E. Coles's visit    
[4:314n](#)



Adams, Abigail Smith (John Adams's wife); correspondence with T. B. Hollis    
[6:228](#)



Adams, Abigail Smith (John Adams's wife); correspondence with TJ    
[3:305, 3:307, 3:356, 4:xlvi, 4:312, 4:313, 4:389n, 6:437-6:438, 6:516-6:517, 6:548, 6:551](#)



Adams, Abigail Smith (John Adams's wife); and daughter's death    
[6:388, 6:516-6:517](#)

Adams, Abigail Smith (John Adams's wife); family of    
[5:24n, 6:438, 6:438](#)

Adams, Abigail Smith (John Adams's wife); health of    
[6:437, 7:26](#)

Adams, Abigail Smith (John Adams's wife); house of    
[6:xlvi, 6:386 \(illus.\)](#)

Adams, Abigail Smith (John Adams's wife); identified    
[6:298n](#)

Adams, Abigail Smith (John Adams's wife); letters from    
[6:516-6:517](#)

Each entry has a link-making function associated with it. A user copies this link and pastes it into the document at the relevant text

Sub entry "correspondence with TJ" has ten documents associated with it. Clicking any of these links opens up the document, in this case, volume 4, page 312

Susan H. Perdue, Director, Documents Compass, with contributions from Ellen Hickman, Assistant Editor, Jeff Looney, Editor, and Susan S. Spengler, Senior Digital Technician, all at the *Papers of Thomas Jefferson: Retirement Series*