

# Annotation

*Institute for the Editing of Historical Documents 2019*

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# Objectives

- What is annotation?
- How much do I need?
- Where should it go?
- What are the different types?
- What about digital editions - should we think differently about placement and type?
  - And what about metadata?

# What is Annotation?

Information added by editors to improve the user's understanding of a document.

Can serve several different functions:

- Makes the text of documents more readable
- Clarifies unusual terms
- Offers background on events and people
- Supplies missing information
- Provides readers with historical context

# How Much is Needed?

Who will be using your edition?

- Scholars and elementary students need different levels of annotation.
- People outside the United States may need different amounts of annotation regarding American history topics and vice versa.
- Experts may require a different kind of annotation than generalists do.

# How Much is Needed?

What are your documents like?

- Do they describe the recent past, or a past that might be unfamiliar to general readers?
- Do they cover topics that are not commonly known?
  - technologies
  - discussions of authors and works
  - specialized knowledge

# How Much is Needed?

How selective is your edition?

- A comprehensive edition does not need to summarize documents, just point to their location in the edition.
- A highly selected edition needs to explain what came before and after the documents, pointing readers to related materials that were not included and summarizing documents and gaps in time.

# How Much is Needed?

In what context will they be read?

- Most print editions seek to be a stand-alone resource that identifies everything.
- Editions accessed on the Web are being used in a context where readers can easily Google a topic or consult Wikipedia for more information.

This changes how we should be thinking about annotation.

# Annotation Placement

Where will you place various types of annotation?

- Foot/endnotes in document?
- Appendices at the back of the book?
- Encyclopedia-like sections of a website?
- On main navigation on a website?

Digital publication may change the way that you approach annotation placement.



# Annotation Placement

A good exercise for designing your digital presentation is to think about all the things you want a reader to be able to see/click on when they are reading a document.

Then figure out where you want them on the screen. You can draw or use a web-based tool to create a wireframe.

# The John Dickinson Writings Project Digital Edition

[Home](#)[About](#)[Documents](#)[Search](#)[Browse](#)[Resources](#)[Contact](#)[Page Overview](#)[Annotation](#)[Document Information](#)[Transcription](#)

## Title

- John Dickinson to Thomas McKean

## Date

- 8 June 1762

## People

- Mr. Boggs
- Dr. Jones
- Mr. Napier

## Places

- New Castle

## Topics

- Advice/Moderation

## Related Documents

- Will be linked here

This information (captured from document, annotation, and index) will be stored in taxonomies and content types to allow for searching and browsing of edition.

Catalog metadata/source information

Annotation view

These are tabbed views, containing linked metadata, annotation, and document information.

Dear Sir,

I receivd your Favour by Mr. Boggs, & am very much pleasd with the kind Sentiments You entertain of Me; perhaps the more pleasd, because my Heart tells Me they are not altogether unmerited, & that I shoud suffer a great Deal of Uneasiness, if You thought differently of Me—

I shall be very happy, if I can do any Service to Jemmy— I have written to Dr. Jones who has a very good Interest with Mr. Napier—& have procurd several Letters of Recommendation from Friends of that Gentleman here—so that I hope our young [page break] Friend will succeed in his Design—

I shall take Care of your Docquett in this Court— but I desire You woud not take too much Care of your Business in New Castle— If You write with such Application, You will make yourself too weak to receive any Benefit from your Jaunt— Moderation in every Thing is the Source of Happiness— Too much Writing, {—} too much Reading—too much Eating—too much Drinking—too much Exercise—too much Idleness—too much loving—too much Continece—too much of Law—Physic—or Religion—all equally throw Us from the Balance of real Pleasure— This has been said a thousand Times—always believd—& practiced against— It is still true—

I shall be ready to attend You next Thursday [page break] or Friday Week into the Jerseys—& wish I may contribute as much to your Satisfaction—as You will to that of

your affectionate Friend  
& very h[um]ble Servant

**John Dickinson**  
Philadelphia  
June 8<sup>th</sup> 1762

# Forms of annotation

- Introductions
- Headnotes
- Source notes
- End and footnotes
- Biographical directories
- Timelines and chronologies
- Maps and Gazetteers
- Family Trees
- Photographs and illustrations
- Glossaries
- Visualizations
- Essays
- other ideas?

# Source Notes

Statement of the location of the original material on which the editorial text is based:

ADfS, DNA: RG 59, Miscellaneous Letters; LB, DLC:GW. A purported ALS was offered for sale by Parke-Bernet Galleries, Inc., *Autograph Letters Documents and Manuscripts of Historic Literary and Musical Interest*, sale 1787, 3 Dec. 1957, item 251. Where the ADfS is mutilated, the text in angle brackets has been supplied from the letter-book copy.

Describe other copies or versions that might appear, explain any problems with the original (torn, missing pages, etc). Sometimes include descriptions of letterhead, envelopes, and other parts of the document not transcribed.

# Source Notes

Historical annotation that refers to a document as a whole:

- ID of first mention of author/recipient
- Example: ALS, DLC:GW. Before the French Revolution, Mathurin-Michel Amoureux (1747–1832) had been a merchant at Lorient, France, with clients including John Paul Jones. He soon moved west from Georgetown, spending time in Kentucky before settling around 1801 in what became Missouri. There he was a probate judge, justice of the peace, and merchant.

Explanations of editorial decisions that affect the document as a whole:

- Assigning of a date to an undated document
- ID of unnamed recipient
- Attribution of authorship to an unsigned document
- Example: AL (fragment), DLC:GW. The document is dated approximately by Newenham's reference to the death of William Brownlow on 28 Oct. 1794 (E. M. Johnston-Liik, *History of the Irish Parliament, 1692–1800: Commons, Constituencies and Statutes* [6 vols., Belfast, 2002], 3:293).

# Source Notes

## What about source notes in a digital edition?

General Ledgers A, B, & C contain the basic business accounts of George Washington's estates for forty-three years. A name index for each volume provides access to records showing receipts and expenditures in transactions with individuals (the index for Ledger Book B is a separate volume). All receipts and expenses for goods and services generated by Washington's Mount Vernon estate can be found here. Mostly in Washington's own hand, these records show the acquisition of land, the sales of farm products, the work of servants, the operation of mills, and the purchases and sales of slaves. Ledger C is at Morristown National Historical Park in Morristown, New Jersey.

There are 356 folio pages.

Washington, George. *George Washington Papers, Series 5, Financial Papers: General Ledger A, 1750 to 1772.* /1772, 1750. Manuscript/Mixed Material. Retrieved from the Library of Congress, <https://www.loc.gov/item/mgw500001/>. (Accessed February 16, 2017.)

**Source/Repository:**

**DLC:GW:** U.S. Library of Congress, George Washington Papers, Washington, D.C.

**Library of Congress Title (Legacy):**

Ledger Book 1, 1750 - 1772

**Library of Congress Link:**

George Washington Papers, Series 5, Financial Papers: General Ledger A, 1750-1772

**Transcription Available:** Yes

**Time Period:** Colonial (7 July 1748 - 15 June 1775)

**Related Accounts:** General Ledger B, 1772 - 1793 [Washington]  
General Ledger C, 1790 - 1799 [Washington]

**Document Type:** Ledger Book of Accounts

Think about document-specific information and metadata.

# Headnotes

Often used to introduce a topic or cover a gap in time since the last document. Can serve to alert the reader to an issue that they need to know before reading the document.

## Papers of George Washington

See also document group: Voyage to Barbados, 1751–52

## Margaret Sanger Papers

Does this work well in a digital edition?

# Endnotes/Footnotes

Numbered references placed at specific points in the text which usually explain:

- People or organizations mentioned
- References to letters, books, articles or other works
- References to events, including those mentioned vaguely, which would have been understood by the original reader
- Marginalia, insertions, deletions, and other oddities of the text not covered in transcription guidelines
- Discussions of places mentioned



# Formatting Endnotes/Footnotes

For a digital edition there are new options for how you access endnotes or footnotes when there is no “bottom of the page.”

- [Joseph Smith Papers](#)
- [Founder's Online](#)
- [Dolley Madison Digital Edition](#)
- [George Washington Financial Papers Project](#)

# Essays and Introductions

- General introductions to the edition, volume introductions, chapter introductions, all provide the editor with some space to offer an interpretive framework for the documents that will follow. Sets the expectation of the reader.

[Margaret Sanger Papers Volume Introductions](#)  
[Margaret Sanger Papers Chapter Introduction](#)

- How would this work in a digital edition?

[Thomas Jefferson's Three Volumes Introduction](#)

# Glossaries

Explanations of abbreviations, short titles, organizational acronyms, unfamiliar words, and the like can help readers deal with peculiarities of the edition.

\*In digital edition, you need to consider carefully whether to continue to use abbreviations, as space is no longer an issue.

[Papers of George Washington](#)

[GWFPP glossary](#)

[Joseph Smith Papers](#)

# Directories

- **Biographical** - Can provide more in-depth treatment of important people in the edition.
- **Organizations** - Same for organizations, conferences, other groups.
- **Books/Periodicals** - Describe books and journals important in the edition ([Emma Goldman Papers](#))
- **Gazetteers** - Discusses places ([Joseph Smith Papers](#))
- **More...** ships, battles, herbs, just about anything that is treated throughout your edition that could use a little more space to make a richer experience for the user.

*In digital editions, this approach often makes more sense than in print.*

# Biographical directories

## Treatment can be very different

- Encyclopedia-like, covering whole life
- Specific to the subject of the volume--how that person impacted and interacted with the topic.
- Essay-like
- For digital editions, try to develop content that does not repeat already accessible materials (ex. Wikipedia)

[Emma Goldman Directory of Individuals](#)

[Jane Addams Biographical Profiles](#)

[Joseph Smith Papers Reference- People](#)

[Papers of Abraham Lincoln](#)

# Bibliographies

You can provide lists of sources used, books in your subject's library, books for more information, etc. A digital edition can provide links to full-text versions of some books (especially older ones) in large-scale digital libraries like [Google Books](#), [Internet Archive](#) and [Hathi Trust](#).

[Jefferson's Libraries](#)  
[GWFPF](#)

# Chronologies/Timelines

Short chronologies at the start of an edition help the reader navigate the volume; more detailed chronologies can map the subject's life against important events in history.

[Joseph Smith Papers: Reference - Events](#)

[Emma Goldman Papers Chronology sample](#)

[The Papers of Martin Van Buren](#)

[Thomas Jefferson's Three Volumes](#)

# Calendars of documents

Some selected editions include a calendar of documents that were not included in the edition. They might be summarized, or just listed, to give the reader a good sense of the whole collection. In digital editions, this could take the form of a link to an image archive, or a database of all known documents.

- [Albert Einstein Digital Archive record](#)
- [Joseph Smith Papers Calendar](#)



# Visualizations

Might include family tree, organizational structure of a company, military unit, etc. if it is an important feature of the texts. Helps readers visualize what can be difficult to describe in prose. Maps can help readers understand travels, military or speaking campaigns. Photographs can help readers to make connections with the people and places mentioned in the documents.

[Adams Family Tree](#)

[Rockefeller Foundation People](#)

[Mapping Margaret Sanger's Speeches](#) (Google Fusion table)

[GW's Trip to the Society of the Cincinnati](#) ([StoryMapJS](#))

# Digital visualizations

Digital editions can create complex on-the-fly visualizations that digital humanities projects have:

- [Franklin correspondence visualization](#)
- [Comparing versions](#) (Juxta Commons)
- [Topic Modeling](#) (Martha Ballard Diary)
- Linked data networks ([Linked Jazz](#))

These are not necessarily things that you might want to do yourself, but understanding how they work and what forms your data can be in would enable others to use your edition for this work.

# Designing Annotation Policy

Consistency is important! Start making a list of the things that you think you need to annotate - and the things that you **don't**.

- Will you identify every person mentioned? Every “important” person? How will you decide who is “important”? How much information will you provide for every biography, and what happens when you can't locate the information? Same for places, organizations, events, etc.
- Will you identify every document, book, article, etc. mentioned? How much information will you provide for each?
- Will you include citations in your annotation? Of primary sources only?

# Designing Annotation Policy

- If you are going to use directories for fuller descriptions of people, places, and organizations, how do you determine which people get this treatment?
  - Number of mentions in the volume?
  - Importance of the subject?
- Will there be some easy way for the reader to know which people/organizations/places are covered in such a section when you are in the document?
  - In print format, are you expecting them to flip to the back of the book each time a person is not identified in a footnote?
  - In digital format, is there some way that you can typographically alert the reader that a name is linked to a larger entry?

# Designing Annotation Policy

## How much annotation?

- Often a very subjective distinction that only the editor can make.
  - Every editor has their own style - find your happy place!
- How readily accessible is the information covered in the annotation?
  - Some editions have to do massive amounts of research to put together a three line identification of an obscure individual
  - Others may be dealing with famous people that the reader can easily find more on if they want to.

# General Advice

1. Look at as many editions as you can.
2. Show your documents to scholars, other editors, students, and other members of your audience:
  - a. what are they interested in?
  - b. how would they use the materials?
3. Look at digital humanities sites?
  - a. What do cutting edge scholars want?

# Supported by:

Association for Documentary Editing

&

National Historical Publications &  
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