Choosing a Platform/Tool

First, think about the types of source materials you are working with and want to include:

- documents (also type - letters, diaries, financial, legal, etc.)
- maps
- images
- audio
- downloadable files
- video
Choosing a Platform/Tool

What kinds of metadata do you want to capture?

- author/recipient
- date
- title
- keywords
- topic

→ allows editor to add terms that might not appear in source materials

data that describes other data

Some examples:

- Sanger Papers Digital Edition (XML)
- Founder’s Online (XML)
- Papers of the War Department (Omeka)
- GW Financial Papers (Drupal)
Choosing a Platform/Tool

Next, consider what you want to do with the content (i.e. display and functionality):

- Search/browse/query
- Display
  - transcription
  - capture formatting?
  - transcription + image
  - collection / exhibit
- Context (data visualizations, annotations, index, ...)

... taxonomies, essays, introductions, glossary, etc.)

Design; things to consider:

- Default view of content
- Alternative content views
- Navigation
- Page layouts
- Site organization
- Aesthetic
Choosing a Platform/Tool

What other types of content do you want to include?

- Document catalog
- Editorial apparatus
- Project information
- Resources
Choosing a Platform/Tool

Additional questions:
- Will you use platform for both preparation and publication?
- Do you want to manage workflow in platform? To what extent?
- Will you need to export content from the platform for print publication and/or integration into other sites/platforms?
- Will you need to import existing/legacy content? If so, what format is it in?
Choosing a Platform/Tool

A few other details...

- Do you have a host?
- Access to technical support?
- Cost - just because it’s free doesn’t mean you won’t need to spend money (server space, programming, design).
- Does the platform have an active user community?
- How much customization will need to be done?
What are the options?

- XML
- Omeka
- Drupal

... descriptions/instructions, dollhouses, and legos.

Others include FileMaker/DocTracker, WordPress, Islandora, Scalar, FromThePage
XML

- Extensible Markup Language
- independent of any one hardware or software system
- designed to describe data
- some platforms we’ll discuss do accept XML
- can convert XML to HTML and PDF for web publication
there are advantages and disadvantages of using XML - a few to keep in mind while discussing tools and platforms:
○ XML has to be transformed or converted in order to publish
○ best for certain types of materials
○ the Text Encoding Initiative (TEI) developed guidelines for encoding texts in the humanities and social sciences - lots of users
Example - XML Source File

```xml
<?xml version='1.0' encoding='UTF-8'?>
<xml xmlns:rel='http://rel.com' type='doc'>
  <node id='0006-02-02-0259' type='document'>
    <FEDA:metadata id='0006-02-02-0259'>
      <bibli type='metadata'>
        <title>From George Washington Parke Custis, 17 June 1798</title>
        <author>Custis, George Washington Parke</author>
        <recipient>Washington, George</recipient>
        <name when='1798-06-17'>Washington, George</name>
        <FEDA:author id='0006-02-02-0259'>Custis, George Washington Parke</FEDA:author>
        <FEDA:recipient id='0006-02-02-0259'>Washington, George</FEDA:recipient>
        <FEDA:dayRange from='1798-06-17' to='1798-06-17'>1798-06-17</FEDA:dayRange>
        <FEDA:mapData from='1798-06-02-02-0259' to='1798-06-02-02-0335'>0006-02-02-02-0335</FEDA:mapData>
        <head id='0006-02-02-02-0259'>From George Washington Parke Custis</head>
    </bibli>
  </node>
</xml>
```
From George Washington Parke Custis

DEAREST SIR:

I received your letter by mamma at this place, where I had come on my uncle’s horses, and with Mr. McDowell’s permission, in hopes of meeting her. She arrived the same day that I did, and informed me particularly respecting the subject of your letter, which appeared to set heavy on your mind. The report, as mamma tells me, of my being engaged to the young lady in question, is strictly erroneous. That I gave her reason to believe in my attachment to her, I candidly allow, but that I would enter into engagements inconsistent with my duty or situation, I hope your good opinion of me will make you disbelieve. That I stated to her my prospects, duty, and dependance upon the absolute will of my friends, I solemnly affirm. That I solicited her affection, and hoped, with the approbation of my family, to bring about a union at some future day. I likewise allow, the conditions were not accepted, and my youth (age) being alleged by me as an obstacle to the consummation of my wishes at the present time (which was farthest from my thoughts), I withdrew, and that on fair and honorable terms, to the satisfaction of my friends.

Thus the matter ended, and should never have proceeded so far had I not been betrayed by my own feelings. However rash and imprudent I may be, I have always remembered my duty and obligation to you, which is the guide of my actions. It was this which prevented my entering into any engagements which were not entirely conditional.

To my mother I disclosed the whole affair, who is now perfectly satisfied; and I hope this small statement of facts, which I can confirm, either upon oath or the testimony of my friends, will eradicate all uneasiness from your mind.

Let me once more, sir, on the shrine of gratitude, plight my faith to you; let me unclasp the sacred books of morality and lay my duty, nay, my all, at your feet. Your beneficence could not enhance your virtues; on my heart they are engraven as the benefactor, the friend, nay, the more than father of,

G. W. P. Custis.

1 The Miss Jennings with whom young Custis fell in love was probably Elizabeth Jennings, the daughter of Thomas (c.1736–1796) and Juliaana Jennings, who lived in the Fara House in Prince George Street in Annapolis. Elizabeth married Benjamin Hodges in 1808. See David Stuart to GC, 22 Aug. 1798.
Omeka

- CMS built on the MySQL-PHP technology stack
- free, open source web-publishing platform
- good for displaying library, museum, archives, and scholarly collections and exhibits
- features
Omeka

Strengths

● Uses Dublin Core standards for metadata
● Can export metadata records as XML
● Easy menu-based metadata creation
● Plugins can allow mapping, timelines, and customizations
● Growing community of users, finding a programmer to customize it is not that hard
● Easy to build exhibits
● Images and transcriptions
● Expandable through designing your own plugins
Weaknesses

- You'll have to do some customization to make it look like an edition.
- Look for platforms other than Omeka if your materials are too specific or complex and you need to create specific data models, views into the data, and services to connect your work.
Examples - Omeka

Jane Addams Digital Edition
(https://digital.janeaddams.ramapo.edu)

Civil War Governors of Kentucky Digital Documentary Edition
(http://discovery.civilwargovernors.org)
Drupal

- free, open-source CMS written in PHP
- active user community
- platform for organizing, visualizing, and analyzing data
- the most basic Drupal site consists of the core (software) + database
Drupal - How it works

- the core consists of infrastructure (menus, user account management, file uploading capabilities, Drupal admin interface) plus a number of modules that provide specific site functionality
- the site’s database stores site configuration info as well as your site’s content
- there are over 4,000 modules available for download, from those that display content in a variety of ways to those that solve specific problems
- themes are used to design site
Drupal - A few components

Content Types

- templates for storing different kinds of data
  - WP limits you to posts and pages
  - in Drupal, you can create any number of content types which can have any number of fields for storing different kinds of content

Taxonomies

- associates categories, tags, or similar data with your content and users

Views

- by default, there are two options for displaying content: viewing a full node or a shortened teaser version - for more options, use views
- views allow you to query your database in complex ways and display the results
Examples - Drupal

The Papers of Martin Van Buren
(http://vanburenpapers.org)

George Washington Financial Papers Project
(http://financial.gwpapers.org)
Supported by:

Association for Documentary Editing

&

National Historical Publications & Records Commission