

# Tools & Platforms

*Institute for the Editing of Historical Documents 2018*

Presentation by: Jennifer Stertzner

# 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?



data that describes other data

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

Some examples:

- [Sanger Papers Digital Edition](#) (XML)
- [Founder's Online](#) (XML)
- [Papers of the War Department](#) (Omeka)
- [GW Financial Papers](#) (Drupal)

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

# 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

# XML

- 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 version="1.0" encoding="UTF-8"?>
<div1 xml:id="Ret02d234" type="doc" n="GEWN-06-02-02-0259">
  <FGEA:mapData id="GEWN-06-02-02-0259"><bibl type="metadata">
    <title>From George Washington Parke Custis, 17 June 1798</title><author>Custis, George Washington
    Parke</author><name type="recip">Washington, George</name><date when="1798-06-17"/></bibl><FGEA:Title>From
    George Washington Parke Custis, 17 June 1798</FGEA:Title><FGEA:Author>Custis, George Washington
    Parke</FGEA:Author><FGEA:Recipient>Washington, George</FGEA:Recipient><FGEA:mapDates><FGEA:searchRange
    from="1798-06-17" to="1798-06-17"/><FGEA:dayRange from="1798-06-17" to="1798-06-17"/></FGEA:mapDates>
  </FGEA:mapData>
  <head>From George Washington Parke Custis</head>

  <div2 type="docbody">
    <opener>
      <salute><hi rendition="#small-caps">Dearest Sir:</hi></salute>
      <dateline><hi rendition="#small-caps">Marlborough</hi> [Md.], <date when="1798-06-17"><hi
      rendition="#italic">June</hi> 17<hi rendition="#italic">th,</hi> 1798.</date></dateline>
    </opener>
    <p>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 <hi rendition="#italic">subject</hi> of your letter, which appeared to set heavy on
    your mind. The report, as mamma tells me, of my being <hi rendition="#italic">engaged</hi> 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 <hi rendition="#italic">enter into engagements</hi> 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
      <pb xml:id="GEWN-06-02-02-pb-0336" n="336" corresp="Ret02p336"/>
      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.
    </p>
    <p>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.</p>
    <p>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.<ptr target="GEWN-06-02-02-0259-fn-0001" n="1"/></p>
    <p>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. The benefactor, the friend, nay, the more than father of,</p>
    <closer>
      <signed>G. W. P. Custis.</signed>
    </closer>
  </div2>
  <div2 type="docback">
    <note xml:id="GEWN-06-02-02-0259-sn" corresp="Ret02p336" type="source">
      <p>
        <ref target="PGWst391" type="short-title">Custis, <hi rendition="#italic">Recollections,</hi>
      </p>
    </note>
    <note xml:id="GEWN-06-02-02-0259-fn-0001" corresp="Ret02d234n1" n="1" type="fn">
      <p>The Miss Jennings with whom young Custis fell in love was probably Elizabeth Jennings, the
      daughter of Thomas (c.1736-1796) and Juliana Jennings, who lived in the Paca House in Prince George Street in
      Annapolis. Elizabeth married Benjamin Hodges in 1808. See <ref target="GEWN-06-02-02-0436" type="document">David
      Stuart to GW, 22 Aug. 1798</ref>.</p>
    </note>
  </div2>
</div1>
```

# XML Example - Published

**The PAPERS of GEORGE WASHINGTON** DIGITAL EDITION  
ROTUNDA

ENTRY · ABOUT · SEARCH · PREFERENCES · LOG OUT · HELP

PUBLICATION: Washington | VIEW: Contents, Chronology, Index, Search Results

The Founding Era Collection > The Papers of George Washington Digital Edition > Retirement Series (4 March 1797–13 December 1799) > Volume 2 (2 January 1798–15 September 1798) > Documents > From George Washington Parke Custis, 17 June 1798

printable version | Go to page: [ 335 ]

## From George Washington Parke Custis

DEAREST SIR: MARLBOROUGH [Md.], June 17th, 1798.

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 [336] 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.<sup>1</sup>

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.

Custis, *Recollections*, 106–8.

<sup>1</sup> The Miss Jennings with whom young Custis fell in love was probably Elizabeth Jennings, the daughter of Thomas (c.1736–1796) and Juliana Jennings, who lived in the Paca House in Prince George Street in Annapolis. Elizabeth married Benjamin Hodges in 1808. See [David Stuart to GW, 22 Aug. 1798](#).

Cite as: *The Papers of George Washington Digital Edition*. Charlottesville: University of Virginia Press, Rotunda, 2008.  
Canonic URL: <http://rotunda.upress.virginia.edu/founders/GEWN-06-02-02-0259> [accessed 23 May 2018]  
Original source: Retirement Series (4 March 1797–13 December 1799), Volume 2 (2 January 1798–15 September 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

# Omeka

## 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

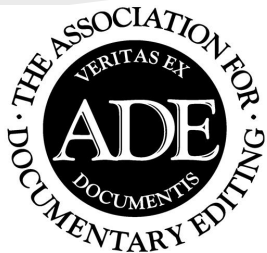
(<http://financial.gwpapers.org>)

Supported by:

Association for Documentary Editing

&

National Historical Publications &  
Records Commission



NATIONAL  
ARCHIVES

NATIONAL HISTORICAL  
PUBLICATIONS  
& RECORDS COMMISSION