

The Champlain Society Guidelines for Editing Canadian Historical Texts

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Documentary editing is not simply copying or transcribing a text; it is a highly complex procedure which is embedded in relationships that usually go unanalyzed. -- Jennifer S.H. Brown²

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²Jennifer S.H. Brown, "Documentary Editing: Whose Voices?" *Occasional Papers of the Champlain Society*, No. 1 (Toronto: The Champlain Society, 1992), 3.

I Introduction

During its nearly one hundred years of existence, the primary mission of the Champlain Society has been to publish, on a regular basis, editions of significant Canadian documentary materials prepared to a high standard. In 1992 the historian Jennifer S.H. Brown, a Champlain Society Council member and the General Editor of the Rupert's Land Record Society, spoke about the challenges of editing to a one-day conference sponsored by the Champlain Society. She was concerned about the role of the Champlain Society in changing times, particularly the developing need to include documents relating to women and aboriginal peoples. But she also made an optimistic statement about what historical editing, scrupulously carried out, can accomplish:

To catalogue all the roles of a documentary editor is to realize that in fact ... this shadowy figure whose name appears in small print on a title page ... is indeed very powerful. We tend to think of editors as mediators or transmitters, rather like telephone lines carrying messages from text to reader. But they in fact are more like transformers, controlling and modifying the actual nature of the signals ... that they carry They are the critical decision-makers about the text and the author behind it. As such, they have the powers of judging and determining which texts go forward to an audience and how they are presented and represented, voiced, muted, or silenced.³

The Champlain Society has been the chief -- and is now almost the only surviving -- example in Canada of the practice of historical or documentary editing. How can we go about ensuring that this transforming power represents to the eventual readers of our editions the best editorial practices?

Most editors beginning a project in English will encounter two different approaches to editorial technique: the literary and the historical. Their relationship has been the subject of sharp debate in the Anglo-American editing community. *Textual editing* has a long tradition as a

³Brown, "Documentary Editing: Whose Voices?" 8.

branch of philology.⁴ More recently, drawing on the work of biblical and Shakespearean scholars as well as that of the bibliographer Sir Walter Greg, the American scholar Fredson Bowers and others developed a tradition of literary editing that attempts, through intensive manuscript research and the close comparison of variants, to establish an “ideal” text of a given work, the text that the author would have intended as the best version of his or her work, but purged of the casual accidents of publication. Literary editing has sometimes produced texts surrounded by forests of variant readings and with elaborate annotation.⁵

Historical or documentary editing also has a long tradition (see below), but its techniques have been the subject of particularly intense discussion in the twentieth century. Often associated with the great American “Presidential Papers” projects, documentary editing tends to emphasize the historical moment of a given text, the letter as it was received by the addressee, not as first drafted by the originator, the constitutional document in the form in which it was passed, not in its unamended version. Historians have usually preferred a “clear text” without elaborate apparatus, and have often preferred to modernize. But if literary editing has been vulnerable to accusations of pedantry,⁶ historical editors in their turn have been accused of naivete about the ways documents are created; given the potential variations introduced by drafting, transcription, transmission, typesetting, and above all, editing, can there ever be a really “clear text”?

⁴See particularly D.C. Greetham, *Textual Scholarship: An Introduction* (New York: Garland, 1992) and the short bibliography which concludes these guidelines.

⁵American literary editing has generally neglected the well-established French tradition of “best text” editing based on the work of Joseph Bédier. See, for example, Bernard Barbiche and Monique Chatenet, *L'Édition des textes anciens XVI^e-XVIII^e siècle. Documents et méthodes no 1*, 2nd ed., Paris: Inventaire général des monuments et des richesses artistiques de la France, 1990. The difficulties inherent in both schools of literary editing are helpfully analyzed by David Greetham, *Textual Scholarship: An Introduction*, 323-25 and passim; regrettably he does not address the specific problems of documentary editing.

⁶Louis Mumford's famously critical review of the early volumes of the journals of Ralph Waldo Emerson (“Emerson Behind Barbed Wire,” 1968) is discussed in Mary-Jo Kline, *A Guide to Documentary Editing* 2nd ed. (Baltimore: John Hopkins University Press, 1998), 12-15.

In 1978-81 two notable articles addressed these issues. G. Thomas Tanselle, in “The Editing of Historical Documents,”⁷ spoke for the literary editors, and Robert Taylor responded on behalf of the historians in “Editorial Practices -- An Historian's View.”⁸ Two decades later it has become apparent that literary editors have learned much from the techniques of historical editing, and historical editors have lost their innocence about how their documents come into existence. Furthermore, fresh participants have entered the debate: scholars from the developing field of book history, who have cast inquiring eyes on the material processes of creation and transmission undergone by all textual works, of whatever kind. Such processes themselves may exhibit important historical evidence which editors of the past often neglected.

The English editor P.D.A. Harvey's recent and very engaging *Editing Historical Records* sums up a lifetime of editing medieval, early modern and eighteenth-century documents, chiefly for the Portsmouth Record Series. His three essential guiding principles, which represent a distillation of the vital elements of the English experience of editing, are a good place for any editor of a Champlain Society edition to begin. Harvey's advice to the first-time editor is:

- 1 Be accurate;
- 2 Say what you are going to do and do it;
- 3 Give full references to the document and describe it.⁹

To these principles of accuracy, consistency, and accountability might be added inclusiveness: in his view the best approach to editing historical records

is to try to make the edition of value to any conceivable future enquiry, bearing in mind not only every kind of historian, professional or amateur, but scholars from other disciplines and general enquirers of every kind. There should not, in other words, be one way of editing a text for the literary scholar, another way for the etymologist, another way

⁷*Studies in Bibliography* 33 (1978), 1-56.

⁸*Newsletter of the Association for Documentary Editing* 3, 1 (1981), 4-8.

⁹P.D.A. Harvey, *Editing Historical Records* (London: The British Library, 2001), 13.

for the family historian; a proper edition should be adequate for them all, and for many others besides.¹⁰

That recent arrival on the scene, the book historian, would warmly second Harvey's inclusiveness, since it is in preserving all the details of a document's creation and circulation that the documents of book history itself are preserved.

In what follows, we offer a set of guidelines that will assist editors preparing a volume for the Champlain Society to mediate between the texts their research has convinced them should be introduced to a wider public, and that public. We begin with some background on the historical situation of the Society itself within the community of documentary and historical editing. Moving to practical matters, we then discuss the making of a Champlain Society volume, from front matter through edited text to bibliography and index. At the end is a short list of works on bibliography, book history, and editorial practice that will prove useful to the first-time editor and provide reference material for the more experienced. Included in that list is information about the circulating "Champlain Society Editorial Library," a set of helpful volumes that editors are encouraged to borrow and consult at an early stage of their work.

¹⁰Harvey, *Editing Historical Records*, 11.

II The Champlain Society and Documentary Editing

In England the editing of historical documents has a long history, the beginnings of which can be traced in David Douglas's fascinating account of the non-juring churchmen who, in the late seventeenth century, attempted to defend their theological position by collecting and publishing the records of English ecclesiastical history.¹¹ In the United States the publication of records began with Ebenezer Hazard's *Historical Collections* (1792),¹² and in Canada Thomas B. Akins published *Selections from the Public Documents of the Province of Nova Scotia* in 1869.¹³ Throughout the nineteenth and twentieth centuries such series – whether governmental or private – proliferated. This development was fuelled in part by the public interest in narratives of exploration, out of which England's Hakluyt Society and our own Champlain Society emerged. In the United States the emphasis has chiefly been on publishing multi-volume series of the papers of major historical figures such as George Washington and Benjamin Franklin, and today persons as diverse as Albert Einstein, Emma Goldman, and Martin Luther King. In both England and the USA there are many local record societies publishing the documents in their care. Most recently, there have been documentary series developed to advance knowledge of popular culture and gender studies, and others in electronic form.

Canadian editors occupy a complex position between these various editorial traditions. Despite the development of governmental and private projects in the late nineteenth and early twentieth centuries, historical editing as such is not flourishing today in Canada.¹⁴ Setting aside

¹¹David Douglas, *English Scholars* (London: Jonathan Cape, 1939).

¹²Kline, *A Guide to Documentary Editing*, 4.

¹³Laura Millar Coles, "Looking Backward; Reaching Forward: The Champlain Society and Documentary Publishing," *Occasional Papers of the Champlain Society*, No. 1 (Toronto: The Champlain Society), 16.

¹⁴See Coles, "Looking Backward; Reaching Forward," passim.

the problem of changing audiences over a century, we can point to the frail cultural infrastructure that has always been an obstacle in our huge, thinly populated country. It has been difficult to develop local record societies with the capacity to publish documents, and in the course of publishing them to develop the tradition of historical editing that would sustain a modern editor approaching a new project. Governmental publishing has been sporadic, and private societies like the Champlain Society have come and gone.

In Quebec there has been active collaboration between historians and literary scholars, and the Bibliothèque du Nouveau Monde has an admirable record of issuing carefully prepared texts of historical and literary interest to Canadians. In English Canada, literary editing has flourished, producing an accumulating body of experience that has usually been devoted to projects of international significance, not only the *Records of Early English Drama* (an entirely documentary project), but the noteworthy editions of the works of Erasmus of Rotterdam, John Stuart Mill, Emile Zola, Benjamin Disraeli, the letters of Mme de Graffigny, and the more recently established edition of the collected writings of Northrop Frye.

A specifically Canadian publication series such as that of the Champlain Society can draw on all these experiences of editing, but only to a certain extent. After a hundred years of activity, and the withering of much documentary publishing in our country, the Society, whether we like it or not, is in a position of leadership akin to that of England's Hakluyt Society and the projects to edit the papers of American presidents. However, it is a solitary position, the result of three factors which, when taken together, differentiate the Champlain Society's publications from comparable series elsewhere. First, with occasional exceptions the Society publishes only single volumes, not multiple volumes or long series of papers. Second, it has a responsibility not only to Canadian history and geography, but to Canadian writing; texts which might be read chiefly by historians in England or the USA may, in Canada, be treated as foundation texts of our literary culture. Third, besides an audience of interested professional scholars in history, literature and other fields, the Society's membership represents a long-established group of book collectors and general readers, one rooted in the history of the Society, the other now broadening as our publications are mounted on the web.

Good editorial practice has always involved thoughtful consideration of the way in which a given text is mediated, of the way editors, printers and publishers, however much or little attention they pay to the texts they issue, all act as filters between the text as it was written and the way a reader or user encounters it. Twenty-first-century editors, however, are confronted not only with the familiar manuscripts, early printed books, typescripts, maps and public documents our predecessors worked on, but with the need to “edit” the visual and electronic communications of the new century; increasingly, to these is added the aboriginal record in all its forms. A further issue is presented by the occasional need to present translations of materials in other languages that will constitute authoritative sources for those who do not read those languages.

A final and very important issue is that of the ownership of the materials (both textual and illustrative) scholars seek to edit. International copyright law makes a clear distinction between the document, text, or image as a physical property (ownership of the document) and as intellectual property (the copyright and moral rights of the document’s creator). Ownership of a document as a physical property does not imply copyright, and conversely ownership of copyright may sometimes belong to a person other than the owner of the physical property.

It is the responsibility of volume editors to determine who holds the copyright to all documents and images used in their edition, and to ensure that the copyright holder has given permission for the Society to publish this material in the volume. Copies of the relevant letters of permission should constitute part of the initial proposal for the edition.

These guidelines cannot address all of the problems that may arise in the course of preparing an edition. They are, however, intended to provide the editor who begins a Champlain Society edition with a general standard of good editorial practice for the preparation of specifically Canadian documentary and historical texts. However, there is no substitute for early consultation with the General Editor. By doing so, Champlain Society editors will assist in the continuing task of rethinking the guidelines as they are challenged by particularly demanding or novel projects, and eventually revising them in the light of accumulated experience.

III Champlain Society Editorial Practice

How does an editor put to work P.D.A. Harvey's three essential principles, all of which lead to the ideal goal of an inclusive text, open and useful to all? The criterion of accuracy goes without saying, but accurate with respect to what? Some texts are very difficult to transcribe, some may be incomplete, others, if printed, may exist in multiple and variant texts, authorized or pirated. Just where do you "say what you are going to do," and how much are you going to say about it? Giving full references to the document may seem easy, but it has sometimes been neglected. And moving on to the next step, what does it actually mean to "describe" a document? Even inclusiveness poses its problems, because the heavily annotated text that is an open book to some readers poses insuperable problems to others. Clearly an editor has many decisions to make. We've approached the making of these decisions by following the different parts into which an edition should in most cases fall.

First an important initial point: there is a difference between editing the source document or text and preparing the final copy for submission to the General Editor. The preparation of the source text is a scholarly task, and behind it lies the long history of *textual editing* described above. In what follows we outline some of the scholarly protocols for achieving a well-edited text of the document according to those principles. However, the preparation of the editor's own written material – preface, introduction, annotations, appendices, textual note, bibliography – will be subject to a different set of protocols known as *copy-editing*. The source text is *never* copy-edited; it is the editor who establishes and presents that text, by means that will be explained in the Textual Note. The materials of which the editor is author, however, will be copy-edited to a consistent standard by the Society's copy-editor (in consultation with the editor, of course).

For the "modern" materials in a volume, those that will be copy-edited, the Society recommends two basic reference aids to its editors. The first is *The Chicago Manual of Style* (15th edition), Chicago: University of Chicago Press, 2003 (or subsequent revised editions),

hereafter *CMS*. For assistance with footnotes, endnotes, and other problems of documentation, see Chapters 16 and 17. In addition, we prefer a different method for citing archival sources. *CMS* uses the order from the particular to the general, whereas the reverse order (name of the institution, title of the fonds (the records of a particular individual or organization) or collection, citation number based on the style of the institution, title of the item, date of the item) is well established in Canada and recommended by the Library and Archives of Canada, the Archives of Ontario, and other institutions.

Our second reference source – in this case for matters of spelling only – is *The Canadian Oxford Dictionary*. This dictionary is based on the scholarship of the Oxford dictionaries, but gives preferences to Canadian usage and includes many Canadianisms not in other dictionaries.

IV Editing a Document or Text

1. The Elements of a Champlain Society Volume

1.1 Front Matter (sometimes referred to as “Prelims”)

[Material for items indicated with an asterisk is to be supplied by the volume editor.]

The front matter of a published book is conventionally paginated in small roman numerals. This section will be subject to copy-editing, and should be prepared using *The Chicago Manual of Style* and *The Oxford Canadian Dictionary*.

1.2. Half-title, with society’s volume number and name of General Editor.

Verso of half-title [blank].

1.3. Society’s title page, featuring the name of the Society in large letters, the title of the edition in smaller letters, the Society’s crest, and “Toronto: The Champlain Society.”

Verso of society’s title page [blank]

1.4. *Frontispiece, if any, with its caption (see 1.6, below).

1.5. *Title page of the edition, with the words “edited by” and the editor’s name, and “Toronto: The Champlain Society, [and year of publication].”

Verso of title page, containing copyright statement and Cataloguing in Publication Data.

1.6. *Table of Contents.

Verso of Table of Contents [continued, if necessary]

1.7. *Illustrations [list].

Note that a **separate list of captions**, with citations of sources in the form requested by the owners of the images, should be prepared for insertion with the images when the volume is in production.

In addition to their responsibility for requesting permission to publish images, authors are responsible for the cost of all reproduction and permission fees. Permissions should be sought from the copyright owners of images as early as possible, since negotiating access and ordering reproductions often takes some time. Do not submit photographs or scans

with the original manuscript; retain them and supply only photocopies until the book goes into production.

Verso of Illustrations [continued, if necessary]

1.8. *Maps [list]

Though maps should be listed separately, they are subject to the same requirements as illustrations, 1.6 above.

Verso of Maps [continued, if necessary]

1.9. *Preface and Acknowledgements.

In the Preface and Acknowledgements the volume editor has the opportunity to explain the inception and carrying-out of the edition, as distinct from the Introduction, where the focus is on the text being edited. It is customary to thank fellow scholars for any assistance they have given with the work of the edition, to acknowledge the libraries and archives where research was undertaken, and to express gratitude for funding in support of research and publication. Thanks for permission to publish documents, images and maps should also be recorded here. In the case of images and maps, specific citations of the source copies being reproduced are usually given in the captions appearing with them. Footnotes are not customary in the Preface and Acknowledgements.

2. Introduction

2.1. The **Introduction** is among the most substantial features of any edited volume. In it the editor has the opportunity to discuss at length the significance of the documents or texts being edited, their sources and provenance, the author or authors' lives and contributions, or in other cases the history of the institution that has generated the documents and the ways they were created – indeed, anything that is important for a reader's understanding of the edited text. This is probably the best place to discuss the history of editing the text itself (if it has been edited before). However, descriptions of sources and discussions of editorial method should appear in a separate Textual Note (see 5.3). Detailed commentary on specific topics in the text is best kept for the annotations to the text (see 5.1).

2.2 **References** appear in footnotes following the citation methods recommended in chapter 16 and 17 of *CMS*. Pagination of the volume with Roman numerals begins with the first page of the Introduction. The Introduction will be subject to copy-editing.

3. **The Edited Text or Texts**

3.1. **Methodology.** The text or document being edited should be prepared using accepted scholarly methods that produce an authoritative and clearly explained version of the original. The editor should detail the decisions involved in preparing it in the Textual Note (5.3). The copy-editor will not edit the resulting text, except to read it with the editor's own procedures in mind and point out possible typographical errors and anomalies. Maps and illustrations should be subjected to the same critical analysis as the text being edited.

Texts edited for the Champlain Society have come from a variety of sources: early manuscripts and printed books, personal diaries and letters, governmental and institutional documents, and texts in languages other than English. In some cases these sources exist in one or more versions, not always of equal validity. Many Champlain Society editions will not require an elaborate editorial methodology, but the basic approach is laid out below to illustrate the kinds of problems that can arise with even the least challenging text; we have covered many issues that will not be relevant to most projects. The basic principles we advocate are two: fidelity to the source text, and transparency with respect to method. Fidelity is difficult, because no edited text is ever without mediation, but a transparent editorial methodology, with all editorial decisions carefully explained, will ensure that the edition becomes a reliable authority.

3.2 **Translations.** Champlain Society texts which are translations of writings and documents in languages other than English pose special problems, and consultation with the General Editor while preparing a proposal is strongly recommended. Briefly put, the selection of the base text in the original language from which the translation has been prepared should be subject to the same kind of critical editorial thinking as a text in English (see below).

The volume editor is responsible for making or commissioning translations and for any related expenses, and for ensuring their accuracy and readability.

Translations, being in effect “modern” text, will be subject to copy-editing.

4. Preparing the Text

The guidelines below apply to maps, tables and illustrations as well as textual matter. It is important to ensure that images have been selected and prepared with the same critical awareness as the documents being edited; see 4.12, below.

4.1. **Editorial Diary.** As the source document or text is being edited, it is a good idea to keep a diary or notebook of editorial decisions as they are made. Some projects take a number of years, and decisions made in the early stages may need revision in the light of growing experience or the discovery of new evidence, by which time the reasons for that early decision may be long forgotten.

4.2. **Principles of Selection.** The Champlain Society does not advocate editions of heavily excerpted texts, because one reader’s trivia may turn out to be another’s essential historical information. In making a proposal to the Society, the editor will have argued the case for publishing the specific texts in question. To do so may involve selection from a larger body of documents or papers, on such principles as genre, theme, or biographical relevance. Thus, depending on the reason for the edition, a subject’s letters to his wife might be selected as opposed to those to his employers, the correspondence between a cabinet minister and his or her secretary, as opposed to the minister’s official reports. In accepting the proposal, the Society will have accepted the editor’s argument for such a selection, which will in due course be explained in the Introduction. Further excerpting of individual documents is discouraged, though the elision of formulaic material and the systematization of salutations, etc., may be necessary (and should of course be explained in the Textual Note). If in doubt, consultation with the General Editor at an early stage is recommended.

4.3. **Establishing the Text.** Champlain Society editors do not always have to choose between different versions of a text, but knowing what the procedures are for doing so is an essential editorial skill. An editor's first task is to locate all known versions of the document or documents being edited and evaluate their provenance and respective strengths and weaknesses. For example, should the editor choose the first edition of a printed book, or a later edition revised by the author? the letter as drafted or as finally sent? the manuscript report in a private collection or the printed version as issued by a government agency or institution? If the text was printed, were there several editions (all copies of which may need to be compared) or variant issues of a single edition? Once compared, each known version should be given an identifying letter (in editorial parlance, a *siglum*).

A more complex problem, not unlike that faced by the editor of a Canadian exploration journal, is described by Michael Brennan, Honorary Series Editor and Secretary of the Hakluyt Society: "Should a modern editor seek to collate a standard nineteenth-century version of a printed work (now based upon lost manuscript sources) against earlier manuscript accounts which are essentially very different texts in themselves? The result can be not so much a list of 'variants' as an attempt to edit simultaneously two or more entirely distinctive texts! The challenge of editing materials where only a mixture of manuscripts and later printed works supply the whole text is a tricky one."¹⁵ Should a Champlain Society editor have to face such a challenge, early consultation with the General Editor is recommended.

Once the known versions of the text are identified, their textual merits evaluated, and a *siglum* chosen for each, the editor is in a position to decide on scholarly principles which version will form the base text of the edition. This does not mean that other versions should be discarded. Rather, they should be closely compared with the base text to reveal any variants that might cast light on it (see 4.6, below, for the next step in analyzing variants).

¹⁵Michael Brennan, personal communication, July 2003.

- 4.4. **Original Sources.** The editor should be prepared to spend time studying the originals of the documents and texts in question. Microfilms, scans and photocopies are important aids for checking and re-checking transcriptions, but they are not a substitute for close familiarity with originals. The annals of scholarship are rich in anecdotes about imperfect microfilms (“Oh, we set the focus to cut off the marginal stuff because we didn’t think you needed it”), or photocopies that failed to include seemingly blank pages that had useful small annotations. In addition, photographic or electronic copies cannot provide the necessary information for the preparation of a physical description of the sources (see 4.10).
- 4.5. **Transcription.** The editor should prepare a complete and accurate transcription of the source documents or texts, making no editorial alterations whatsoever at this point, but keeping a list of all differences between versions (see “Establishing the Text,” 4.3) and points that will need annotation. This text should then be carefully proofread against the originals. A copy of this original, proofread transcription should be kept separately from copies made during subsequent editing; it is a good idea to give it a special name and to password-protect it, as a reminder that it should not be altered.
- 4.5.1 **Cancellations and Interlineations.** Editors using manuscript material (for example, journals and letters) will frequently encounter text that has been cancelled, written over, and interlined. Most editorial projects establish rules of greater or less complexity, depending on the source text, for dealing with such problems. Among the most frequently used techniques: **to underline expanded material are: indicating** intelineation and insertions by carets (<...>), and placing damaged or unreadable words in square brackets with a question mark, thus [...?]. For example, a list of transcription rules might cover:
- Elements preserved, such as recurrent abbreviations.
 - Elements expanded, such as infrequent abbreviations.
 - Elements normalized, such as the old use of v for u, i for j, ff for F. (It should be kept in mind that the older use of long S in manuscript or printed texts is today invariably silently normalized.)
 - Handling of damaged text, indecipherable words, cancellations, inserted lines.

Whatever the case, the editor must steer a judicious course between the scholar's obligation to establish an authoritative text and the reader's need for a readable book. If the editor is in any doubt about establishing a set of transcription rules, early consultation with the General Editor is advisable.

- 4.6. **Recording Variants.** Having transcribed the base text, the editor should record all substantive variants in the different versions, listing each under the relevant identifying letter or *siglum*, and establish a policy for accounting for accidentals. Substantive variants are differences that alter the meaning of a text; "accidentals" are differences in spelling or punctuation that do not affect meaning. The preparation of such a list is essential during the research phase of the project, and the list may, if needed, form an appendix of textual variants in the final edition.
- 4.7. **Editing the Text.** Once the base text is transcribed and proofread, a decision will have to be made as to what extent editorial intervention or "emendation" is needed. Emendation is the practice of correcting the base text by analysing the conflicting textual sources to produce what the editor can argue, on historical and philological principles, is the most correct or at least probable reading. The following "Editorial Excursus" illustrates the kinds of issues an editor might face in attempting to emend his or her base text.

Editorial Excursus: "Three Bales of Marten Skins."

Let us take an invented example: the manuscript document being edited (A) reports the shipment of three bales of marten skins. There are two other copies of the document: B uses the spelling "martin," C says the furs were fox. If we turn to the supporting documents, we find that the ship's manifest says the furs were fox, the dock receipt says there were two bales of fox, and the author's diary says that, as he remembers it, he shipped "some bales of beaver." Which copy of the text – A, B, or C – should be chosen as the base text, and how should it be annotated to indicate the difficulties posed by the sources?

Our example suggests why the Champlain Society ordinarily discourages the production of “eclectic” editions, where a so-called “ideal” text is the objective. Eclectic editing, which attempts to reconstruct the author’s final or most perfected version from the testimony of different manuscripts and early editions, is well suited to classical, medieval and early modern texts, and to literary texts, and there is much discussion of them in the scholarly literature. Clearly the thorny differences represented here (and in many similar documentary situations) make it evident that an ideal text would not be possible, and suggest why eclectic editing is often less suitable for historical and documentary texts. Thus, unless a strong argument can be made for an eclectic text, the Society prefers editors to select on good evidence a single base text that can then be annotated to indicate possible alternative readings in cases where any difficulty arises. If the editor, after consultation, chooses to produce an eclectic edition, he or she will then need to evaluate carefully the testimony of differing versions to decide where the base text should be emended.

In the invented example above, the editor will have argued the case for selecting A as the base text. The spelling “martin” in document B is clearly an accidental and is also a misspelling of a common name. It might be recorded in a list of accidentals, but should otherwise be ignored unless it provides evidence of the author’s spelling eccentricities. C, however, raises the important issue of the authority of each of the three versions. Presumably A has been chosen as the base text because the editor has concluded its general authority is greater (it has a good provenance, is written in the author’s hand, etc.). But since C says “fox,” and this is repeated in the ship’s manifest and the dock receipt, the editor will have to decide, probably on strictly historical grounds, what furs in fact were shipped, thus either adding to the authority of A or possibly putting it in question. If A was indeed in the author’s hand and the author’s diary later says “beaver” this could raise the possibility of emendation.

At any rate, once the decision has been made, the variants can be listed in an appendix to the Textual Note, and the edited text annotated (see 5.1) to indicate the problem. If this textual crux raises enough questions, it might also lead to a paragraph in the Introduction.

- 4.8. **Reporting variants.** If the text being edited has been produced as the result of the comparison of variant versions, textual variants should be included in an appendix to the Textual Note. A list of any emendations is mandatory, usually in a separate appendix.
- 4.9. **Grammar and spelling.** These should be reproduced as they appear in the original document, as they may provide important cultural and linguistic information. The explanation of difficult words may take place in a glossary. Punctuation and paragraphing wherever possible should be those of the original, and any alterations (for example, the transformation of dashes into periods or the breaking up of exceptionally long paragraphs) should be accounted for in the Textual Note. We do not support the use of “sic” to indicate unusual usages, since any critically edited text is assumed to represent the usage, however eccentric, of its author.
- 4.10. **Describing the sources.** A physical description of each document should be prepared, first as part of the edition’s research records, but then for eventual use in the Textual Note. This description will be composed of all or most of the following:
- 4.10.1 The **name of the source** (archives, and fonds or collection? library? private collection?) with citation number as based on the style of the institution.
- 4.10.2. The **date** of the document, if known. Speculation about dates should take place in the Textual Note but such “supplied dates” may be noted in square brackets
- 4.10.3. The **author** of the text, if known. Speculation about names should take place in the Textual Note, but “supplied names” may be noted in square brackets.
- 4.10.4. If the document is a manuscript, **identification of the hand** if possible, and any comments on the script.
- 4.10.5. The **format** of the document:
- 4.10.5.1. If a **manuscript**, is it a single sheet? Of what size (both dimensions, in millimetres)? Written on both sides? Several sheets? Separate, or folded together in a booklet? Watermark evidence should be reported, and its implications for the makeup of the document discussed.

4.10.5.2. If the document is a **typescript**, some of the same questions may apply, and it is important to note any handwritten additions, corrections, and signatures.

4.10.5.3. If the source is a **printed book**, the specific copy used should be carefully described: publisher, date, pagination (with any variations), dimensions, provenance of the copy, and any handwritten marginalia or pasted-in insertions.

The protocols for describing a printed book are laid out in detail in a number of the works in the bibliography appended to these guidelines, and the General Editor can give advice if needed.

4.10.5.5. **Binding.** If the document, whether manuscript or printed book, is bound, the binding should be described, briefly if it is a commercial or edition binding, and in more detail if it is an early binding or a privately bound book. Binding evidence may be important in arguing the history of the transmission of the document or text.

4.10.6. **Provenance.** An account of everything that is known of the history of the document's ownership. This research may later be needed for the Introduction, but even so, a brief account should be part of the document description.

4.11. **Proofreading.** Of course the editor will proofread the entire manuscript when it goes into production, but long before that happens he or she will need to proofread first the base text, and then the text as it has been edited. Proofreading should be done against the original document or text, if possible. If that is not feasible, then the text may be read against microfilmed, scanned or photographed copies that *have previously been compared with the originals*. Nothing causes an editor more chagrin than reading a knowledgeable review that points out errors of transcription.

4.12. **Maps and illustrations.** Illustrations are an important element in the publications of the Champlain Society. Excellent illustrations, well reproduced and properly captioned, can make a volume sparkle and enhance its value to readers; the reverse can drag a volume down. The Society encourages its editors to pay as much attention to the illustrative matter – photographs, engravings, paintings, maps etc. – as they do to their documents, and to apply to it the same critical procedures as with textual material.

4.12.1. **Assembling and arranging maps and illustrations.** “Maps” can be existing ones (usually historical) that have been photographed or scanned, or created by a cartographer using information supplied by the volume editor. Chapter 12 of *CMS*, titled “Illustrations and Captions” (15th edition, pp. 473-93), provides excellent advice about this subject to assist a volume editor. Examples of the topics covered are: “Placement and Numbering,” “Physical Handling of Artwork” (for works to be reproduced photographically and electronically), “Captions” (including credit lines), and the “List of Illustrations.” The additional works on publishing listed under the heading “Illustrations” (*CMS* 869) are valuable, especially Mark Monmonier’s *Mapping It Out: Expository Cartography for the Humanities and Social Sciences*, and Edward R. Tufte’s three books covering illustrations and graphics. We encourage an editor to begin early to collect a folder of possible illustrations by photocopying items that might be used later. Seek out archivists, librarians and others who might be able to make helpful suggestions. Collect as much information as possible about the works – author, title, date, holder of the original, permission fees and reproduction rights, etc. – so that the ones selected later for inclusion in the volume can readily be located and acquired for reproduction, and captions can easily be written. As *CMS* points out, the ways authors prepare illustrations and publishers handle them are changing rapidly, and so it is advisable for editors to discuss the matter of illustrations with the General Editor when they begin to work on their volume.

4.12.2. **Captions.** A separate list of captions, with citations of sources in the form requested by the owners of the images, should be prepared for insertion with the images in the volume.

4.12.3. **Permissions and reproductions.** The amount and form of illustrative material (for example, the use of colour) will be decided by the General Editor in consultation with the volume editor, taking into account the relevance and suitability of the illustrations, the cost involved, and any other related issues.

NB: Authors are responsible for requesting permission to publish images, and for the cost of all reproduction and permission fees. Permissions should be sought from the owners of images as early as possible, since negotiating access and ordering reproductions often takes some time.

4.12.4. **Submission of materials.** Do not submit photographs or scans with the original manuscript; retain them and supply only photocopies for early discussion purposes.

5. **Preparing the Volume Manuscript**

Once the document or text has been edited, it is time to begin the assembling of the volume's manuscript. In the course of establishing the text, the editor will have also identified the kinds of additional material the reader may need: certainly annotations, but also appendices of relevant materials, a biographical dictionary or *prosopography*, a glossary of specialized words or phrases, a gazetteer. The development of such sections in an addition may be predicted in the original proposal, but the final allocation should be discussed again with the General Editor once the base text has been edited.

- 5.1. **Annotation of the Text.** Whole books have been written on footnotes, endnotes, marginalia, and all the joyful apparatus of commentary. Annotating the text will give the editor an opportunity to explain and clarify many small points that cannot be handled in the Introduction, a process in which editors generally take great delight. The Champlain Society prefers footnotes to endnotes. We advocate notes that are to the point, short to medium in length, as interestingly written as the materials make possible, and carefully documented. Only the volume editor can decide how many notes are needed, but the principle of moderation is encouraged. Annotations should follow the form described in *The Chicago Manual of Style*, "Documentation I," and will be copy-edited.
- 5.2. **Appendices.** In the initial proposal, the editor will have sketched the additional features the edition will need: appendices of relevant materials, glossaries, gazetteers, a biographical dictionary. If appendices contain original textual material, they should be subject to the same critical editing procedures described above. If they contain modern material the editor has originated, they will be copy-edited. Annotation should be used sparingly, if at all, in these sections of the volume, as each entry should contain all the relevant material.
- 5.3. **Textual Note.** The Textual Note is one of the most important parts of the edition; it is here that the editor justifies in detail the authority of the text that has been produced. It should begin with a careful description of the source text or texts, as assembled during the research phase of the

project (see above). It should contain all the material relevant to an understanding of the way the document or text has been edited. Here the editor can discuss in technical detail the origins of the texts used, variant copies, the reasons for editorial decisions, the systematization of elements such as dates, salutations, and signatures. If the text being edited requires it, a list of substantive textual variants should be appended to the Textual Note. The Textual Note will be copy-edited.

5.4. **Bibliography.** The bibliography should have three parts: a list of abbreviations, a list of primary sources, and a list of secondary sources. The bibliography will be copy-edited.

5.4.1. **Abbreviations.**

The list of abbreviations should include a list of the *sigla*, if any, that have been used to distinguish different versions of the source material; they should be listed before all other abbreviations. In addition, most archival sources and published document series can be referred to by standard abbreviations. Abbreviations used repeatedly in the edition should be assembled here, in alphabetical order following the *sigla*, with the full titles to which they refer.

5.4.2. **Primary Sources.** This is the place to list the sources used for the base text of the edition and in the Introduction and annotations, in the following order: name of the institution, title of the fonds or collection, citation number based on the style of the institution, title of the item, date of the item. In the case of printed texts or other library holdings the order would be: library, author, title as it appears on the title page, publication data, call number, and any standard reference numbers such as Tremaine, STC, or Wing. When the list of primary sources is long, sources are sometimes grouped together by country; if in doubt, consult the General Editor.

5.4.3. **Secondary Sources.**

This list should include all the secondary material referred to in the volume, plus any other material which had a formative influence on the editor's research and thinking. It should be arranged as specified in *CMS*, and will be copy-edited.

6. **Index.**

The Index is prepared just before the final proofs are to be approved. It can be done by a professional indexer, but it is generally better for the volume editor to prepare the index. Not

only does he or she know best what needs to be indexed, and under what headings, but making the index affords a valuable opportunity to catch last-minute inconsistencies of terminology, etc.

V Additional Reading: Basic Aids, Classic Books and Articles, and useful Web-Sites

The Champlain Society Editing Library

The five books on the following list have been purchased for the use of Champlain Society editors; please consult the General Editor about borrowing any of them (except for *CMS* they also appear, with comments, in the annotated list below):

The Chicago Manual of Style (15th edition), Chicago: University of Chicago Press, 2003

D.C. Greetham, *Textual Scholarship: An Introduction*. New York: Garland, 1992.

P.D.A. Harvey. *Editing Historical Records*. London: British Library, 2001.

Mary-Jo Kline. *A Guide to Documentary Editing*. 2nd ed. Baltimore: Johns Hopkins University Press, 1998.

Michael E. Stevens and Steven B. Burg. *Editing Historical Documents: A Handbook of Practice*. Walnut Creek, CA: AltaMira Press, 1997.

Current and Classic Writings on the Editing of Texts

The works listed and commented on below appear in an order which will take the beginning editor from large-scale problems of textual meaning and editorial purpose to more specialized and technical issues.

D.F. McKenzie. *Bibliography and the Sociology of Texts*. London: British Library, 1986.

The best possible place to begin. A passionate and massively influential book.

G. Thomas Tanselle. *A Rationale of Textual Criticism*. Philadelphia: University of Pennsylvania Press, 1989.

A very different approach from McKenzie's, by a master of the sheer technicalities of his craft reflecting on issues far beyond the technical. A necessary companion to McKenzie.

D.C. Greetham, *Textual Scholarship: An Introduction*. New York: Garland, 1992.

A thorough survey of the issues involved in, and methods for, "establishing the text." Both historical and systematic. Not the classic that Gaskell (below) is, but very helpful.

Philip Gaskell. *A New Introduction to Bibliography*. 2nd ed. Oxford: Clarendon Press, 1974.

"The Bible" on the subject of hand-press and machine-press printing. The basics on how the printing press and the binding process work, and thus affect the transmission of text. An important and useful reference work.

D.C. Greetham, ed. *Scholarly Editing: A Guide to Research*. New York: Modern Language Association of America, 1995.

Twenty-five essays on editing by leading scholars, divided chronologically and by language area. The quality of the essays varies, but all are extremely informative. Essential reading: Greetham's Introduction, Tanselle's "The Varieties of Scholarly Editing," and, for Champlain Society editors, Myerson's "Colonial and Nineteenth-Century American Literature."

John Carter. *ABC for Book Collectors*. 7th ed. revised by Nicolas Barker. New Castle, DE.: Oak Knoll Books, 1996.

The book- and manuscript-collecting terms used in the book trade.

Armando Petrucci. *Writers and Readers in Medieval Italy: Studies in the History of Written Culture*. Edited and translated by Charles M. Radding. New Haven and London: Yale University Press, 1995.

One of the world's most distinguished palaeographers writes about his craft. Trained in medieval texts, he has worked on all kinds of handwriting, from Etruscan epigraphy to anti-Fascist graffiti.

Mary-Jo Kline. *A Guide to Documentary Editing*. 2nd ed. Baltimore: Johns Hopkins University Press, 1998.

Focuses on the history and problems of North American documentary editing.

Michael E. Stevens and Steven B. Burg. *Editing Historical Documents: A Handbook of Practice*. Walnut Creek, CA: AltaMira Press, 1997.

Covers many of the same issues as Kline (above) but laid out as a practical guide, with many options offered to the prospective editor.

P.D.A. Harvey. *Editing Historical Records*. London: British Library, 2001.

Covers many of the same issues as the two books above, but from the British point of view, and with many memorable anecdotes.

Occasional Papers of the Champlain Society, No. 1. Toronto: The Champlain Society, 1992.

Includes Jennifer S.H. Brown, "Documentary Editing: Whose Voices?" and Laura Millar Coles, "Looking Backward; Reaching Forward: The Champlain Society and Documentary Publishing."
The only available surveys of Canadian documentary editing.

The Book History Reader, ed. David Finkelstein and Alistair McCleery. London: Routledge, 2002.

Many classic articles and chapters in the new field of book history, which deals with the material and economic history of book creation and transmission.

Editing Documents and Texts: An Annotated Bibliography, ed. Beth Luey. Madison, WI: Madison House, 1990.

Compiled for the Association for Documentary Editing, this volume retains its usefulness, though the editor warns that it does not deal with the most recent technical developments in editing resulting from the resources provided by the Internet. Alphabetically organized, with brief but cogent annotations. The introduction groups the entries into useful topical categories, and there is a charming appendix listing some of the many mystery stories whose plots exploit manuscripts, printed books, bookselling and editing.

Documentary Editing. The scholarly quarterly of the Association for Documentary Editing (ADE), in the USA; Spring 2003 marks the beginning of its 25th volume.

Web-sites for Editors

The Champlain Society's web site is <http://www.champlainsociety.ca> In addition, see the following short list of web sites, important for themselves but also containing many links to other sites of use to editors, book historians, and bibliographers.

Bibliographical Society of Canada/Société bibliographique du Canada:

<http://www.library.utoronto.ca/bsc/>

The Bibliographical Society (London): <http://www.bibsoc.org.uk/index.html>

The Bibliographical Society of America: <http://www.bibsocamer.org/>

SHARP (Society for the History of Authorship, Reading and Publication):

<http://www.sharpweb.org/>

ADE (Association for Documentary Editing): <http://etext.virginia.edu/ade/>