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Preview

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Electronic Textual Editing: Guiding Questions for Vettors of Print and Electronic Editions [Committee on Scholarly Editions, Modern Language Association]

Title vetted

Edited by

Date vetted

Vettor and Vettor's SS no.

For each question listed below, the vettor should enter **Yes**, **No**, or **Not applicable** as appropriate. Indication of whether additional comment on this point is made in the attached report is also required.

I. Basic Materials, Procedures, and Conditions

- Has the editor missed any essential primary or secondary materials?
- Has the editor constructed a valid genealogy, or stemma, of all relevant texts?
- Have you tested the validity of this stemma against the collation data and included your findings in the report?
- Have all transcriptions been fully compared by the editor with the original documents, as distinct from *photocopy* of those documents?
- If any transcriptions have not been fully compared with the originals, is there a statement in the edition alerting the user to that fact?
- Has someone other than the original transcriber carried out a thorough and complete check of each transcription, whether against original or photocopy of the original?
- Have you sampled the transcriptions for accuracy and included the results of that sampling in your report?
- Have all potentially significant texts been collated?
- How many times have the collations been repeated by different people?
- Have you sampled the collations for accuracy and included the results of your sampling in your report?

Annotated Bibliography (Van Hulle)

Principles (eds.)

Prose Fiction & Modern Manuscripts (Vanhoutte)

Philosophy Case Study (Huitfeldt)

Electronic Religious Texts (Parker)

Multimedia Body Plans (Eaves)

Epigraphy (Mahoney)

Producing Machine-Readable Text (Fenton & Duggan)

Levels of Transcription (Driscoll)

Digital Facsimiles in Editing (Kiernan)

Authenticating Electronic Editions (Berrie et. al.)

Document Management & File Naming (Crane)

Writing Systems & Character Representation (Wittern)

How & Why To Formalize Your Markup (Durusau)

Storage, Retrieval, and Rendering (Rahtz)

II. Textual Essay

- Does the textual essay provide a clear, convincing, and thorough statement of the editorial principles and practical methods used to produce this edition?
- Does it adequately survey all pertinent forms of the text, including an account of their provenance?
- Does it give an adequate history of composition and revision?
- Does it give an adequate history of publication?
- Does it give a physical description of the MSS or other pertinent materials (including electronic source materials, if any)?
- Does it give a physical description of the specific copies used for collation?
- Does the textual essay provide a convincing rationale for the choice of copy-text, base-text, or the decision not to rely on either?
- Does it adequately acknowledge and describe alternative but rejected choices for the copy-text or base-text?
- If there are forms of the text which precede the copy-text or base-text, can they be recovered from the edited text and its apparatus?
- If not, is it practical, desirable, or necessary to make them recoverable?
- Does the editor give an adequate account of changes to the text made by authors, scribes, compositors, etc.?
- Are such changes to the text reported in detail as part of the textual apparatus?
- If such changes are recorded, but the record will not be published, has the decision not to publish it been justified in the textual essay?
- Is the rationale for emendation of the copy-text or base-text clear and convincing?
- Are *all* emendations of the copy-text or base-text reported in detail, or described by category when *not* reported in detail?
- Are the emendations of the copy-text or base-text consistent with the stated rationale for emendation?
- Do the data from collation support the editor's assertion of authority for emendations drawn from the collated texts?
- If the author's customary usage (spelling, punctuation) is used as the basis for certain emendations, has an actual record of that usage been compiled from this text and collateral texts written by the author?
- Have you sampled the edited text and record of emendations for accuracy, and have you included the results in your report?
- Are emendations recorded clearly, avoiding idiosyncratic and/or ill-defined symbols?
- Does the essay somewhere include an adequate rationale for reproducing, or not, the significant *visual* or *graphic* aspects of the copy-text or base-text?
- Are *all* illustrations in the manuscript or the printed copy-text or base-text reproduced in the edited text?
- If not, are they adequately described or represented by examples in the textual essay?

**When Not to
Use TEI
(Lavagnino)**

**Moving a
Print-Based
Project
(Gabler)**

**Rights &
Permissions
(Case)**

**Collection &
Preservation
(Deegan)**

- Are the visual aspects of typography or handwriting either represented in the edited text or adequately described in the textual essay?
- If objects (such as bindings) or graphic elements (such as illustrations) are reproduced in the edition, are the standards for reproduction — sizing, color, and resolution — explicitly set forth in the textual essay?

III Apparatus and extra-textual materials

- Has a full historical collation been compiled, whether or not that collation is to be published?
- Is the rationale clear and convincing for publishing a *selective* historical collation (say one that *excludes* variant accidentals)?
- Does the selective collation omit any category of variants you think should be included, or include any you think should be excluded?
- Is the historical collation to be published accurate and consistent?
- Are the textual notes clear, adequate, and confined to textual matters?
- Have ambiguous hyphenated compounds (water-wheel) in the copy-text or base-text been emended to follow the author's known habits or some other declared standard?
- Have ambiguous stanza and/or section breaks in the copy-text or base-text been consistently resolved by emendation?
- Are both kinds of emendation recorded in the textual apparatus to be published?
- For words divided at the end of a line in the *edited text*, and stanzas or section breaks that fall at the end of a page in the *edited text*, can the reader tell how these ambiguous forms should be rendered when the text is quoted?
- Does the apparatus omit significant information?
- Can the history of composition and/or revision and/or the history of printing be studied by relying on the textual apparatus?
- Is the purpose of the different parts (or lists) in the apparatus clearly explained or made manifest?
- Is cross-referencing between the parts (or lists) clear?
- Is information anywhere needlessly repeated?
- Is the format of the apparatus adapted to the audience?
- Are the materials well organized?
- Does the historical introduction dovetail smoothly with the textual essay?
- Has the editor quoted accurately from the edited text in the introduction and the textual essay?
- Has the editor verified references and quotations in the introduction and the textual essay?
- Has the editor checked the author's quotations and resolved the textual problems they present?
- Have you spot-checked to test the accuracy of quotation and reference in the introduction, textual essay, and text; and have you included the results of that spot-check in your report?
- Are the explanatory notes appropriate for this kind of edition, for example in purpose, level of detail, and number?

- Is there a sound rationale for the explanatory notes, whether or not the rationale is to be made explicit anywhere in the published work?

IV: Matters of Production

- Did you see a final or near-final version of the edition or a substantial sample of it?
- If you did not see final or near-final copy, were you satisfied with the state of completion of the materials you did see?
- Has the editor obtained all necessary permissions, for example to republish any materials protected by copyright?
- If there is a publisher involved in producing the edition, has the publisher approved
 - -- the content and format of the edition?
 - -- the amount of time needed for proofreading?
 - --the requirements of the edition's design?
 - --cueing the end-matter (textual apparatus and notes) to the text of the edition by page and line number (if this is a print edition) or by other unambiguous means (if this is an electronic edition)?
 - --the printer or other production facility's copy requirements?
- Has ultimate responsibility for maintaining accuracy throughout the production process been clearly assigned to one person?
- Are the proofreading methods sufficient to ensure a high level of accuracy in the published edition?
- How many proofreadings are done?
- How many stages of proof are there?
- When a new stage of proof is read to verify changes or corrections, is adequate provision made for ensuring that all other parts of the text have not been corrupted?
- Is there a provision in place for collation or comparison of the first correct stage of proof against the production facility's final pre-publication output (for example, blue-lines from a printer, or text as rendered for final delivery in an electronic edition)?
- If the edition--whether print or electronic--is prepared in electronic files, are those files encoded in an open, non-proprietary format (for example, TEI/XML rather than Word or WordPerfect)?
- Will anyone other than the editor create or edit these files?
- Is the editor directly involved in encoding (for example, in doing XML markup, or in coding for typesetting)?
- If automated processes are applied to the text, is the editor checking the result for unintended consequences?
- If an index or search engine is to be used as part of the edition, will it be checked or tested in detail by the editor?
- Can the edited text be easily republished, excerpted, or repurposed?
- If the edition is printed, is it suitable for photographic reproduction? If it is electronic, does it provide PDF or other pretty-printing output?
- Will all electronic files used in producing the edition be archived?

- Will a correction file be set up and maintained for correcting the text after its initial publication?
- Is the current state of the correction file available to readers of the edition (on the Web, for example, or on request in printed form)?

V. Electronic Editions

- Does the edition include help documentation that explains the features of the user interface and how to use them?
- Does the edition carry a clear statement of the appropriate re-use of its constituent elements, especially those protected by copyright or used by permission?
- Is the text of the edition encoded in an ISO standard grammar such as XML or SGML?
- Is the XML or SGML applied using relevant community guidelines (e.g., the Text Encoding Initiative Guidelines)?
- If the answer to the previous question is "No," then does the essay on technical methods provide a rationale for departing from community practice?
- Is the edition designed to make its underlying markup (rather than markup that results from a rendering process) available to the reader for examination?
- Is character encoding in the edition done according to an ISO standard (e.g. Unicode)?
- Are rendering or transformation instructions (e.g., stylesheets) encoded in an ISO standard grammar such as XSL?
- Does the edition use ISO standard formats (e.g., JPEG, PNG) for the distribution copies of its digital images?
- If there are time-dependent media elements in the edition (for example, audio or video) are these encoded using ISO standard formats (e.g., MPEG/MP3)?
- Are the distribution copies of multimedia elements (image, sound, video) sufficiently high resolution to allow close study?
- Are the distribution copies of multimedia elements stored at reasonable file-size, given the intended method of distribution?
- Are the sources for those distribution copies archived?
- Are those sources captured at sufficiently high resolution to allow for the future derivation of higher-resolution distribution copies?
- Does the edition have, and does it validate against, a DTD or schema?
- Is the DTD or schema used in marking up the edition adequately documented (e.g., with a tag library)?
- If the edition includes one or more databases, is referential integrity enforced within the database(s)?
- Are the database schema(s) documented?
- Are the stylesheets (or other rendering instructions) documented as to their intended effect?
- Is there a definitive and documented method for determining what constitutes the electronic edition?

- Is there a definitive and documented method for determining whether all the constituent elements of the edition actually exist?
- Is technical, descriptive, and administrative metadata provided for all of the components of the edition, using a library-approved schema (such as METS)?
- If any software has been uniquely developed for this edition, is source code for that software available and documented?
- Has a copy of the edition, its images, software, stylesheets, and documentation been deposited with a library or other long-term digital object repository?

Glossary of Terms

accidentals

A collective term invented by W. W. Greg and now widely used to mean the punctuation, spelling, word-division, paragraphing, and indications of emphasis in a given text--things 'affecting mainly its formal presentation,' as he put it (Greg, 21). ¹Greg distinguished between the accidentals of a text and its words, or substantives (q.v.) Accidentals and substantives are conceptually important for Greg's rationale of copy-text, which assumes that authors are more proprietary about their words than about their accidentals, while typesetters and other agents of textual transmission (copyists, typists, proofreaders, copy-editors) are the reverse. For this reason, at least for an edition aimed at preserving the author's accidentals as well as his substantives, the rationale for choosing a copy-text is first and foremost that, of the available texts, it is the most faithful to the author's accidentals and contains the fewest changes to them by other hands. It is therefore often the first or earliest text in a line of descent, but any author who carefully revised his accidentals (say in the second edition) might oblige an editor to choose that text rather than an earlier one.

authority

Authority is an attribute of any text, or any variant between texts, indicating that it embodies the author's active intention to make or choose a particular arrangement of words and marks of punctuation. Some texts or variants may be said to have "no authority" because they were merely copied (accurately or otherwise) from an earlier text, but without the author's intervention. On the other hand, texts that were set from copy revised by the author are said to contain "new authority," meaning that some of the words and punctuation in them arose from authorial revision of her own text. Likewise, the authority of a holograph manuscript is usually greater than any typesetting of it, but the manuscript's authority at any given point may be superseded by the typesetting if the author made changes on proof or any other intervening document.

base text

The text chosen by an editor to compare with other texts of the same work in order to record textual variation between them. Its selection can

be to some extent arbitrary, or because it is (among the available texts) simply the most complete. Unlike a copy-text (q.v.), it is not assigned any presumptive authority and may not even be used to construct a critical text, serving instead only as an anchor or base to record textual variants.

collation

Comparison. A collation is either the record of the substantive and accidental differences between two or more texts, or the act of comparing two or more texts for the purpose of documenting their differences.

copy-text

The specific arrangement of words and punctuation which an editor designates as the basis for his edited text, and from which he departs only where he deems emendation is necessary. Under Greg's rationale the copy-text also has a presumptive authority in its accidentals (that is, the editor will default to them wherever variant accidentals are "indifferent"-meaning not persuasively authorial or non-authorial). But copy-text may also designate texts for which no later variants are possible or anticipated. It is now commonplace to designate a manuscript letter that was actually sent as a copy-text for a personal letter. In such cases, emendations of the copy-text would normally not of the author's subsequent revisions, but solely of elements in the original manuscript that the editor could not, or elected not to, represent in the transcription. Contrary to certain common misconceptions, copy-text does not mean the copy an editor or author sends to the printer, and it need not represent the "author's final intention." Indeed it is more likely to be his first draft than his final printed revision of a text. Its selection is based on the editor's judgment that the authority of its accidentals is on the whole superior to other possible texts he could choose for copy-text.

digital object repository

A means of storing, retrieving, and administering complex collections of digital objects. If the repository is to meet the needs of scholarly editions, it should have a secure institutional basis (like a university research library) and it should have a commitment to long-term preservation, migration, and access. For an example, see <http://www.fedora.info>

DTD

Document Type Definition-the set of rules that specifies how the SGML or XML grammar will be applied in a particular document instance.

emendations

Editorial changes in the copy-text or base text. These changes may be made to correct errors, to resolve ambiguous readings, or to incorporate an author's later revisions as found in printed editions or other sources, such as lists of errata, assuming for the moment that the editorial goal is to recover the author's textual intentions. Different editorial goals might well call for emendations of some other kind, but they would all still be editorial changes to the copy-text or base text and would under normal

circumstances be reported as part of the editor's accounting of what she had done with the available evidence.

end-of-line-hyphens

Hyphens in a word which fall at the end of a line in a manuscript, or a typesetting, may sometimes be ambiguous. They may be either (a) signs of syllabic division used to split a word in two for easier justification of a line of type (or to fit it on the end of one and beginning of the next manuscript line), or (b) signs that a compound word is to be spelled with hyphens ("water-wheel" or "Jack-o-lantern" if broken after a hyphen at the end of a line might be ambiguous, i.e., intended to be spelled with or without the hyphens). For any source text these ambiguous hyphens require judgment as to how the word was intended to be spelled, and such ambiguities would ordinarily be resolved in the way other ambiguous readings in a copy-text are resolved-by editorial choice, recorded as an emendation (change) in the copy-text. In the text as finally edited and printed, if hyphenation of certain words falls at the end of a line and is therefore ambiguous, the editor should likewise resolve this ambiguity for the reader.

explanatory notes

Notes devoted to explaining what something means or why it is present, rather than textual notes, which are devoted to explaining why the text at a certain point reads in the way it does, and not in some other way.

historical collation

A record of variants for a given text over some defined number of editions (e.g., from the 1st through the 7th edition) or some period of time (e.g., from different impressions of the same edition made between 1884 and 1891). The purpose of historical collations is to put before the reader as complete a record as possible of all variants between a group of texts, from which the editor has had to choose. In the past, but only to save space, historical collations have tended to omit variant accidentals and confine themselves to a record of variant substantives.

ISO

International Organization for Standardization, a worldwide federation of national standards bodies from more than 140 countries, one from each country. ISO is a non-governmental organization established in 1947. The mission of ISO is to promote the development of standardization and related activities in the world with a view to facilitating the international exchange of goods and services, and to developing cooperation in the spheres of intellectual, scientific, technological and economic activity. See <http://www.iso.org/>

JPG

JPG (or JPEG, for Joint Photographic Experts Group) is an open, non-proprietary ISO standard (official name ITU-T T.81 | ISO/IEC 10918-1) for the storage of raster images. For more information, see <http://www.jpeg.org/>

machine collation

Collation by means of a Hinman Collator or other mechanical or optical device, allowing very slight differences between states of the same typesetting to be located visually, without the need for a traditional, point by point, comparison of one text against the other. Machine collation is only possible between different states of the same typesetting.

modernizing

Changing the spelling or punctuation of a text to bring these into conformity with modern standards, as distinct from the standards at the time of first composition or publication.

METS

METS stands for the Metadata Encoding and Transmission Standard, a standard for encoding descriptive, administrative, and structural metadata regarding objects within a digital library, expressed using the XML schema language of the World Wide Web Consortium. The standard is maintained in the Network Development and MARC Standards Office of the Library of Congress, and is being developed as an initiative of the Digital Library Federation. For more information, see <http://www.loc.gov/standards/mets/>

MPEG

MPEG stands for Moving Picture Experts Group, and is the nickname given to a family of International Standards used for coding audio-visual information in a digital compressed format. The MPEG family of standards includes MPEG-1, MPEG-2 and MPEG-4, formally known as ISO/IEC-11172, ISO/IEC-13818 and ISO/IEC-14496. Established in 1988, the MPEG working group (formally known as ISO/IEC JTC1/SC29/WG11) is part of JTC1, the Joint ISO/IEC Technical Committee on Information Technology. For more information see <http://www.mpeg.org/>

PNG

PNG (Portable Network Graphics) is an extensible file format for the lossless, portable, well-compressed storage of raster images. The PNG specification is on a standards track under the purview of ISO/IEC JTC 1 SC 24 and is expected to be released eventually as ISO/IEC International Standard 15948. See <http://www.libpng.org/>

Schema

XML Schemas provide a means for defining the structure, content and semantics of XML documents. For more information, see <http://www.w3.org/XML/Schema>

SGML

Standard Generalized Markup Language, a grammar for text encoding, defined in International Organization for Standardization, ISO 8879. For more information, see <http://xml.coverpages.org/sgml.html>

silent emendations

Editorial changes to the copy-text which are not recorded, item by item, as they occur, but are only described somewhere in the textual essay as

a general category of change, and are thus made "silently," without explicit notice of each and every change.

stemma

A schematic diagram representing the genealogical relationship of known texts (including lost exemplars) of a given work, showing which text or texts any given later text was copied from, usually with the overall purpose of reconstructing an early, lost exemplar by choosing readings from later extant texts, based in part on their relative distance from the lost source. Stemma may also be used simply to show graphically how any given text was copied or reprinted over time, even if the goal is not to recover an early, lost exemplar.

substantives

W. W. Greg's collective term for the words of a given text — "the significant ... readings of the text, those namely that affect the author's meaning or the essence of his expression," as distinct from its accidentals (Greg, 21).^{*} Under Greg's rationale for copy-text, the authority for substantives could be separate and distinct from the authority for the accidentals, thus permitting an editor to adopt changes in wording from later texts, even though she maintained the accidentals of an earlier one virtually unchanged.

tag library

A document that lists all of the tags, or elements, available in a DTD, with a brief description of the intended use of each, a list of its attributes, and brief statements identifying elements within which this element can occur, and which elements it can contain. See <http://www.loc.gov/ead/tglib/index.html> for an example.

textual notes

Notes devoted specifically to discussing cruxes or points of difficulty in establishing how the text should read at any given point. Compare "explanatory notes."

user interface

In an electronic edition, the on-screen presentation of content, including navigational methods, menus of options, and any other feature of the edition that invites user interaction or responds to it.

variants

Textual differences between two or more texts. These would include differences in wording, or in spelling, word-division, paragraphing, emphasis, and other minor but still meaning-bearing elements, such as some kinds of indention and spacing.

XML

eXtensible Markup Language, a simplified subset of SGML (q.v.), developed by the World Wide Web Consortium. For a gentle introduction to XML, see <http://www.tei-c.org/P4X/SG.html>

XSL

XSL is a language for expressing style sheets. An XSL stylesheet specifies the presentation of a class of XML documents (for example, TEI documents) by describing how an instance of the class is transformed into an XML document that uses the specified formatting vocabulary (for example, HTML). For more information, see <http://www.w3.org/Style/XSL/>

Notes

1. Greg, W. W. "The Rationale of Copy-Text." *Studies in Bibliography* 3 (1950-51): 19-36.
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UDM 4

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