An Introduction to Digital Scholarly Editions: Text Encoding Using TEI-XML and Visualisation with EVT

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General information

This workshop provides a theoretical introduction to the themes of digital philology and electronic editions and a hands-on session dedicated to the preparation and visualisation of critical (or diplomatic) editions. At the end of the course, participants will have achieved a basic knowledge in the preparation and publication of digital editions using texts encoded according to the TEI-XML standard and the visualisation software EVT.

Participants can download the workshop slides and an archive containing all the material necessary to follow the lecture and complete the training exercises from this link: http://bit.ly/seminarioFD. Those who are working on their own edition project are encouraged to bring the basic material: images, transcription in text format and, if available, text already encoded in TEI-XML. No prior knowledge is required to attend the workshop, although familiarity with text and XML editors (see below) is certainly useful.

The visualisation software that we will use in this workshop is **EVT – Edition Visualization Technology** (http://evt.labcd.unipi.it/), specifically version 2, which has been designed for critical and diplomatic editions. Since EVT accepts TEI-XML documents as input, a large part of the workshop will be dedicated to the fundamental elements of this language, with a specific focus on

the preparation of critical editions.

Software used

To attend the workshop, you need the following data and programs on your computer:

- an XML editor;

- the folder with the downloadable materials from the link above;

- the latest version of EVT 2 software (if not included in the materials folder).

The most popular XML editor for text encoding is **Oxygen XML Editor**: you can download it and register for a 30-day free trial (http://oxygenxml.com/download.html). The best free and open source option is the **Visual Studio Code** programming editor (https://code.visualstudio.com/), which is to be used in conjunction with the *Scholarly XML* extension developed by R. Viglianti: this extension offers all the basic features to validate against a RelaxNG TEI/XML schema. Another free, open source alternative is **XML Copy Editor** (http://xml-copy-editor.sourceforge.net/), although its functionality is limited due to the fact that it is not actively developed anymore (it only supports the old DTD schema format and is not available for MacOS).

Once you have downloaded the zipped archive and decompressed it on your desktop (don't forget this step!), in the materials folder you will find:

- **critical edition**: the texts we will use to prepare a critical edition;

- **diplomatic edition**: the texts we will use to prepare a diplomatic edition (depending on time availability);

- **doc**: documentation about the encoding scheme, a summary ('cheatsheet') of the TEI elements for the critical apparatus, a manual for the encoding of medieval texts by M. Burghart, and a short tutorial about how to use EVT (`quick-start.pdf`)

- **exercises**: exercises proposed during the workshop (depending on time availability);

- **evt**: the version of EVT to be used in the workshop (usually the latest version available on the home page unless otherwise specified);

- **xml**: sample and starting documents, with the corresponding TEI schemas, to encode the edition.

To install any version of EVT on your computer, simply unpack the downloaded archive into a folder on your desktop or elsewhere on your computer.

To visualise editions produced with EVT locally on your computer, we recommend using Firefox ESR version 60 (https://ftp.mozilla.org/pub/firefox/releases/60.0esr/) or Chrome by running it from the command line with the parameter `--allow-file-access-from-files`. For more information see below the note about the browser to be used.

Basic workflow

Here is a brief step-by-step summary of the workflow to to publish an edition using EVT 2:

1. **Encoding**: you prepare your digital edition by encoding one or more documents in TEI-XML; note that you can take advantage of XInclude to have a "main" file linking together many other TEI documents;
2. **Data preparation**: you copy the different edition components in the appropriate folders and subfolders of `data` (e.g. single side images go in `data/images/single`);
3. **Configuration**: you configure EVT through the main configuration file, `config.json` in the `config` folder;
    a. optionally, you can add your own CSS rules to the configuration by means of the `custom-style.css` file in the same folder;
4. **Testing**: you can verify the result by loading the `index.html` file in a browser. **CAVEAT**: unfortunately, loading the file in Firefox or Chrome doesn't work anymore, see the note about browsers and local testing below.

Documentation and useful links

To encode an edition in TEI-XML, you will need, besides the four basic modules, those relating to the *Transcription of primary sources*, the *Manuscript description* and the *Critical apparatus*. These are all well documented in the TEI **Guidelines**: (http://www.tei-c.org/release/doc/tei-p5-doc/en/html/index.html):

Manuscript Description

http://www.tei-c.org/release/doc/tei-p5-doc/en/html/MS.html

Representation of Primary Sources

http://www.tei-c.org/release/doc/tei-p5-doc/en/html/PH.html

Critical Apparatus   http://www.tei-c.org/release/doc/tei-p5-doc/en/html/TC.html

We will especially focus on the *Critical Apparatus* module and the *parallel segmentation* method, as explained in the *Guidelines*. Other modules may be useful for specific purposes, e.g. *Names dates people and places*, *Linking segmentation and alignment*, etc., and will be mentioned when necessary.

Digital editions based on EVT 1

Vercelli Book Digitale: http://vbd.humnet.unipi.it/beta2/

Codice Pelavicino Digitale: http://pelavicino.labcd.unipi.it/

Humarec Manuscript Viewer. Marciana Gr. Z 11 (379):

http://humarec-viewer.vital-it.ch/

Digital editions based on EVT 2

Pietro da Eboli, *De rebus Siculis Carmen*: http://web.unibas.it/bup/evt2/pde/

Il Rotulo di San Teobaldo: https://www.visitmudi.it/rotulo-di-san-teobaldo/

Progetto VaSto: edizione digitale della *Storia fiorentina* di Benedetto Varchi (1503-1565)

https://dharc-org.github.io/progetto-vasto/
https://dharc-org.github.io/progetto-vasto/evt2beta2/

TEI - Text Encoding Initiative encoding schemas and *Guidelines*

TEI home page: http://www.tei-c.org/

The TEI *Guidelines*:

http://www.tei-c.org/release/doc/tei-p5-doc/en/html/index.html
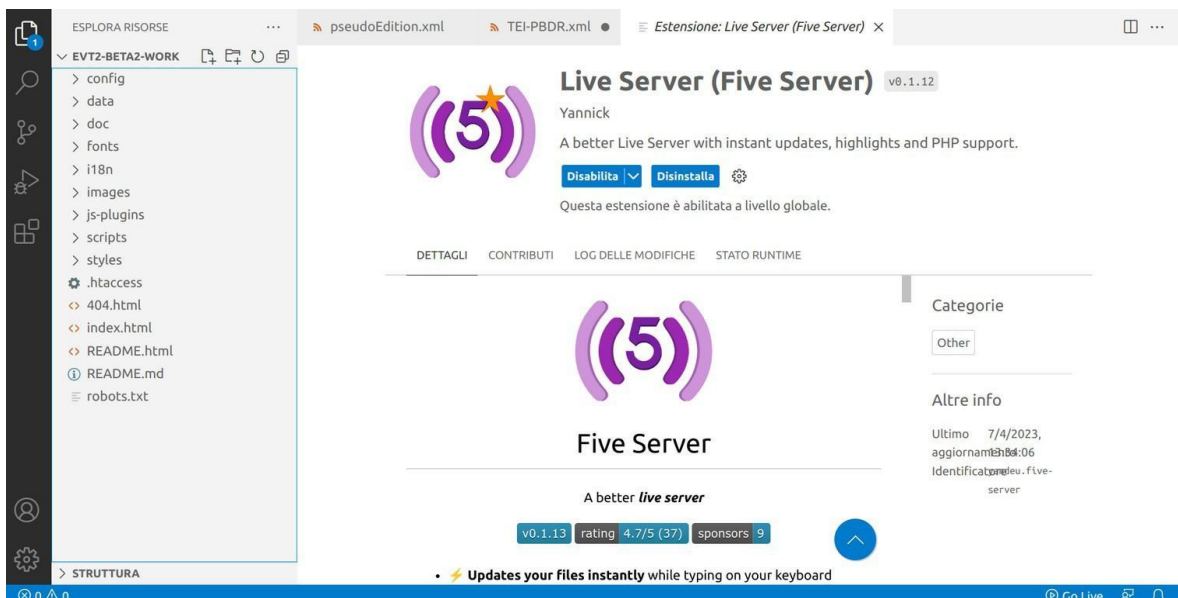
TEI by Example: http://teibyexample.org/

A note about browsers for local testing

Starting with version 67, Firefox developers decided to follow the same cautious policy already adopted by Chrome (and other browsers) to prevent the loading of local resources by JavaScript programs running in the browser. While this policy guarantees more security for the user, unfortunately, it has the unpleasant side effect of preventing the local loading of editions based on EVT (which is implemented in JavaScript) or other similar programs. In other words, whilst before v. 67 you could load your local index.html file in Firefox and browse an EVT edition on your computer, which is very convenient to check for progress and fixes, now that is not possible anymore. Fortunately, there are some solutions available for the local testing of an EVT-based edition:

- download and install **Firefox ESR** version **60**: this version predates the introduction of this new security policy and you can install it in parallel with other versions of Firefox (NB: it is **not** recommended to use this version for your regular browsing needs);
- if you use Visual Studio Code, but also if you do not, a very effective method is to install the **Live server (Five server)** extension: after installation, you have to
  ◦ select the EVT folder: menu `File → Open folder`
  ◦ click on the `Go Live` button in the status bar, lower right corner.

Note that no XML or other document should be open and visible in the editor, otherwise Code will try to load that into the browser using the extension as a local server! Just open an extension info page or the welcome message or anything else;

- launch Chrome from the **command line** with the parameter `--allow-file-access-from-files`:

```
chrome.exe --allow-file-access-from-files
```

or (two separate lines)

```
cd "C:\Program Files (x86)\Google\Chrome\Application\"
.\chrome.exe --allow-file-access-from-files
```

then press CTRL+O to open the index.html file in the EVT folder, or directly drag & drop it on the Chrome window. On a MacOS computer the corresponding instruction is

```
open /Applications/Google\ Chrome.app --args --allow-file-access- from-files
or
open -a "Google Chrome" --args --allow-file-access-from-files
```
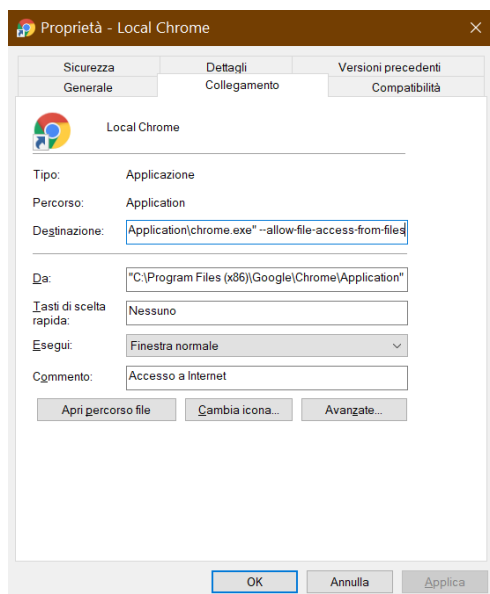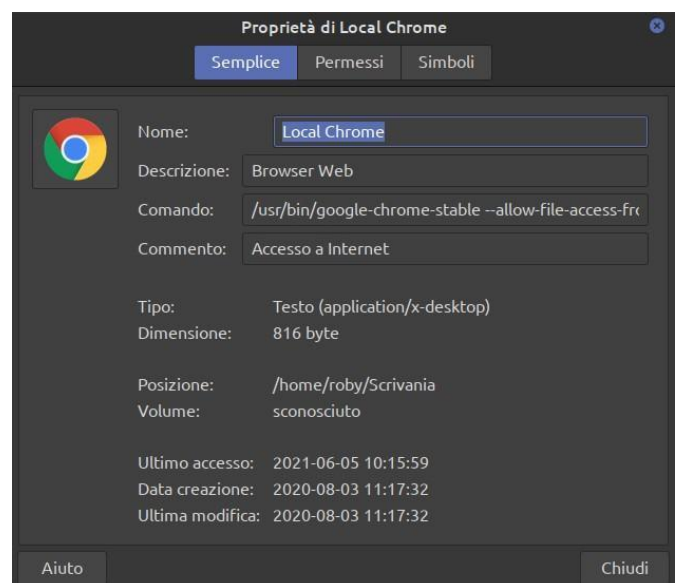
- install an extension that acts as a local web server on Firefox or Chrome, e.g. this one for Chrome:
  https://chrome.google.com/webstore/detail/web-server-for-chrome/ofhbbkphhbklhfoeikjpcbhemlocgigb

If you use Chrome, the simplest solution is to launch it from the command line, you could also set a script or a dedicated icon on the desktop to that purpose:

Windows	*Linux*

In any case, the issue only concerns local testing of your TEI documents in EVT: once the final edition is loaded on a web server, there are no problems in accessing it with any of the most popular browsers.

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