The Alfred Russel Wallace Correspondence Project's Transcription Protocol

Version 23

Contents

INTRODUCTION 3
SETTING UP YOUR WORD PROCESSOR 3
WHAT DOCUMENTS ARE TRANSCRIBED? 4
HOW TO FORMAT THE TRANSCRIBED TEXT 5
- READING ORDER NUMBERS 5
- PAGE NUMBERS OF PUBLISHED LETTERS 6
- MULTIPLE LAYERS OF TEXT 7
- LETTER HEADER 7
  - 1. Sender's Address 8
  - 2. Date 9
- SALUTATION (Greeting at beginning of letter) 10
- PARAGRAPHS 11
- SPACING 11
- TEXT IN THE MARGINS 11
- LATER ANNOTATIONS 11
- LISTS 12
- TABLES 12
- LINES ACROSS THE PAGE 12
- HEADINGS AND SUBHEADINGS 12
- ILLUSTRATIONS 12
- VALEDICTION (The parting words at the end of a letter) 13
- SIGNATURES 13

PROTOCOLS WHICH ARE EXCLUSIVE TO PUBLICATIONS 13
PROTOCOLS WHICH APPLY MAINLY TO MANUSCRIPTS 13
- INSERTED WORDS 14
- SPECIAL SIGNS (BREVIGRAPHS) 14
- SYMBOLS & DIACRITICAL MARKS 14
- APOSTROPHES 14

QUOTATION MARKS....14
PERIODS/FULL STOPS, DASHES & HYPHENS....14
CAPITALISATION OF LETTERS....15
MISFORMED LETTERS....15
CROSSED OUT WORDS....15
UNDERLINING....15
PARENTHESES....15
CATCHWORDS....15
EDITORIAL INSERTIONS AND COMMENTS....16
EDITORIAL INSERTIONS (non-italicised square brackets: [ ])....16
EDITORIAL COMMENTS (italicised square brackets: *[ ]*)....18
1. Uncertain Interpretation....18
2. Missing or Unreadable Text....18
3. Foreign Words and Phrases....18
SURMISED TEXT (angle brackets: < >)....18
PLACE NAMES....18
SCIENTIFIC NAMES....19
ENDNOTES....19
INTRODUCTION....19
HOW TO FORMAT ENDNOTES....20
INFORMATION TO INCLUDE IN ENDNOTES....21
1. Layout of the Manuscript Text....21
2. Later Annotations on Manuscripts....21
3. Endnote Biographies....22
NAMES OF ORGANISMS....24
ABBREVIATIONS AND ACRONYMS USED IN ENDNOTES....25
REFERENCES....26
1. The Data Elements Which Make Up a Reference....26
2. Reference Types and How to Format Them....28
USEFUL RESOURCES....32
PERSONAL NAMES....32
PLACE NAMES....32
SCIENTIFIC NAMES OF PLANTS AND ANIMALS....33
OTHER....33
SAMPLE TRANSCRIPT....34

INTRODUCTION

This guide details the protocol which the Wallace Correspondence Project (WCP) has developed since 2011 in order to transcribe Alfred Russel Wallace's (ARW's) correspondence and other manuscripts. The intention is that the transcriptions and associated metadata will be published in a series of printed volumes and also on the internet via the WCP's online repository. This will soon be Cambridge University Library's Epsilon system, (see http://wallaceletters.info/content/epsilon). The project's original system Wallace Letters Online, has not been updated since 2015 and is replete with errors, so please avoid using it unless absolutely necessary (e.g. in order to view images of letters owned by London's Natural History Museum). The data in http://nialloleary.ie and https://www.omnia.ie are similarly out of date.

The WCP protocol is a method of transcription which aims to preserve much of the layout of the original text, but imposes some formatting rules to standardise it in order to make the text easier to read and understand. The aim is to capture those aspects of the layout which are necessary to make sense of the text, rather than record the exact position of every word on the original page. Editorial comments in the text and endnotes are added to further assist the reader in interpreting the text.

Our protocol can trace its origin back to those used by Darwin Online and the Tyndall Correspondence Project. These in turn evolved from the protocol developed by the Darwin Correspondence Project. Our protocol has now diverged considerably from its ancestors.

Before beginning your transcription work please study a sample transcript (see the sample transcript at the end of this document and those HERE) and read the instructions below carefully.

SETTING UP YOUR WORD PROCESSOR

Before you begin work, please turn off all automatic text correcting functions in the word processor you are using, e.g., auto-capitalisation and spellchecking.

If you are using a PC with MS Word, please locate "AutoCorrect Options" on the Tools menu and untick ALL of the checkboxes on ALL of the tabs. We do **not** want formatting like Word smart quotes (curly quotation marks, i.e., “...”) or features such as automatically numbered lists (when producing numbered lists for endnotes etc., please type the numbers yourself).

Next, from the Format menu, select "Paragraph" and make sure that "Spacing" "Before" and "After" are both set to "0 pt." and that "Line spacing" is set to "Single".

To make sure these are all permanently turned off you need to make these changes to Word's "Normal" template and then save it. This is how you do it in MS Word 2016:

i. Under the "Home" tab, in the "Styles" section of the ribbon, click on the little 'expand' icon in the bottom right-hand corner of that section to bring up the "Styles" Menu.
ii. Click on the drop-down arrow beside "Normal" in the List, and select "Modify".
iii. Make the necessary changes to the document (use the "Format" button to change font, paragraph spacing etc.).
iv. Select "New documents based on this template".

Please never use tabs or indents. If you need to reproduce a list with two or more columns then insert a Table with invisible borders.

Please use Arial 12 point font only. The **only** formatting you should ever use in transcripts is: *italics*, **bold**, underline, **bold underline**, ~~strikethrough~~, superscript and right and left justification. **No other formatting is permitted (including centring text on a line) and any found will be removed.**

Please save documents as Microsoft Word ".doc" files (do not use formats such as ".docx") and ensure that the name of the file matches the WCP document number you are transcribing (e.g., WCP1705_L1587.doc). Please do not add any other text to the file name.

If you have important comments relating to the transcript you are working on which will help WCP staff understand any issues you had with the transcription and which are not covered by the protocols below, then please insert comments into the letter using the MS Word Comments function. If you are a WCP researcher working on Level 2 transcripts and discover any problems relating to the metadata about the letter (e.g., you believe that the date we have for it is incorrect), then please record them in the "Notes About Transcripts And Corrections To Database" document (please ask a member of WCP staff for access).

Please follow the instructions below carefully! If you encounter a situation not covered by them then discuss the matter with a member of WCP staff before proceeding any further.

WHAT DOCUMENTS ARE TRANSCRIBED?

The WCP transcribes manuscript (handwritten/typewritten) and published letters to and from Wallace plus his other manuscripts (which we call **non-letter manuscripts**).

For the purposes of the project a letter is defined as a manuscript communication which has been posted or telegraphed by one person to another. This therefore excludes items such as books or magazines posted by or to Wallace without an enclosed manuscript.

Most letters were sent enclosed in an envelope, but some were not i.e. postcards and some early letters (lettersheets) where the writing paper bearing the handwritten text was folded in such a way that one side bore the postal address of the intended recipient. All items enclosed in an envelope together with a manuscript letter, plus the envelope itself, are regarded as being part of the letter (more precisely the 'letter packet'). All of these items are assigned a unique item number (see below).

In addition to posted/telegraphed letters (which we call **original manuscript letters**), we transcribe the following items:

i. Author's drafts of letters to or from Wallace, even when the text of the final 'posted' version of the letter is known.

ii. Carbon copies of letters (these lack printed or embossed letterheads and the signature of the sender).

iii. Old manuscript transcripts of letters to or from Wallace, especially where the original version is not known.

iv. Published letters (or excerpts) to or from Wallace, largely excluding letters which were specifically written by Wallace for publication (i.e. 'letters to the editor' (LTTEs), which have all been catalogued by Charles Smith and are listed on his Wallace Page website). Only the earliest published version of a letter will usually be catalogued, unless later versions are significantly different, in which case they too will be included. Published excerpts of letters are catalogued only in cases where a more complete version of the letter is not known.

All items which are associated with a letter are assigned one master WCP cataloguing number (e.g., "WCP788") to unite them. Each individual document is also assigned a unique item number, e.g., an enclosure to letter WCP788 may have the item number "98" and its complete WCP cataloguing number would be "WCP788_E98".

HOW TO FORMAT THE TRANSCRIBED TEXT

READING ORDER NUMBERS

Our policy is to assign a consecutive series of numbers, starting with "1", to the pages of all letters, other manuscripts and published text. We call them "reading order" numbers, as they denote the order that the text pages were intended to be read, even if the text is not arranged in a simple linear way. For example, some **original manuscript letters** have two or more 'layers' of handwriting on a single page (please see MULTIPLE LAYERS OF TEXT below for instructions on how to deal with these).

We ignore blank pages in manuscripts, except for **non-letter manuscripts** (e.g., notebooks). For example if a letter has four pages but page 2 is blank, then the text of the transcript will be numbered consecutively 1, 2 and 3.

Reading order numbers should always be enclosed in two sets of square brackets, e.g., [[1]]. **No other text should ever be enclosed in two sets of square brackets.**

The first number "[[1]]" should be the first text entered on the first page of the transcript (it comes before any other text) and it should be separated from subsequent text (e.g., the address) by a blank line (press the RETURN key twice after typing "[[1]]" and then begin typing the transcript).

Reading order numbers denoting subsequent pages of text should be inserted into the appropriate place in the text **before** the first word on the page they refer to and should have a space after them, e.g., "curious [[2]] contrasting colour" or "[[5]] P.S. Williams says..."

In the case of lettersheets (i.e., letters in the form of a folded sheet of paper which were mailed without the use of an envelope), the recipient's address should be transcribed as the final 'page' of the transcript.

If the document is a manuscript rather than a publication, and has page numbers written or typed on it by the author or another person (e.g., a repository), then please record their presence using an endnote (see ENDNOTES below). For example, put an endnote number after the reading order number of the first page ("[[1]][1]") and explain the situation in an endnote, which might read "1. The pages are numbered consecutively from 36 to 40 probably by the repository, with a handwritten number in the top right corner of each page." or "1. Page 1 and every third subsequent page has a consecutive handwritten number in the author's hand, in the top middle of each page." If a repository has written "(2 of 3)" or similar, then ignore everything apart from the page number (in this case "2") in your endnote.

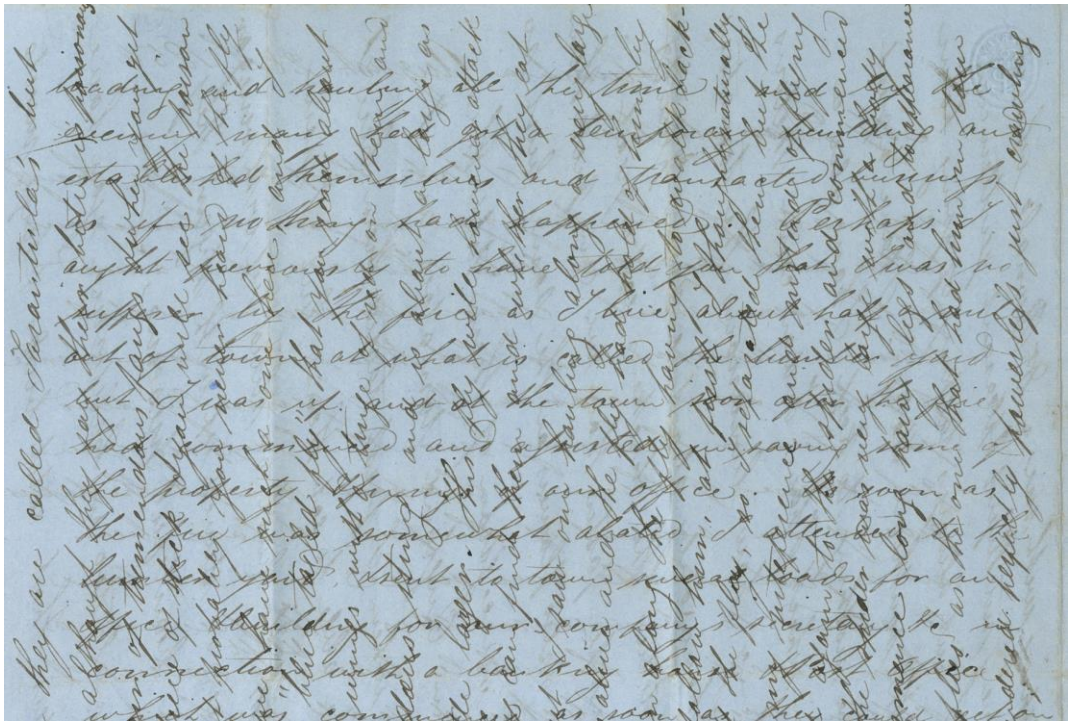
In the case of **non-letter manuscripts** only (e.g., notebooks), blank pages **are** included in the reading order sequence, so the reading order numbers will often (but not always) correspond to the actual numbers of the manuscript pages (which may or not have page numbers written/typed on them). In the case of blank pages, type the number of the page, followed by a space and then the next reading order number, e.g., "the butterfly. [[3]] *[p. 2]* [[4]] *[p. 3]* The river flowed" (in this case page 3 is blank).

PAGE NUMBERS OF PUBLISHED LETTERS

For published letters/enclosures, please record the page number printed on the page in italicised square brackets "*[ ]*" after the reading order number of that page. Please prefix the page number with "*p*. ", e.g., "[[1]] *[p. 262]*" (note the space between "]]" and "[" and after "p.").

MULTIPLE LAYERS OF TEXT

Some early **original manuscript letters** have text which is written in several different directions (e.g., horizontally and vertically) on the same page. Here is an example:



Please insert the transcribed text of the second (and any other) layers into the transcript at the point where it was intended to be read and use endnotes to explain the situation. The same should be done for any text in the margins (see HERE).

For example, a two page letter may have two layers (horizontal and vertical) of text on both pages and the reading order of the text may be: page 1 then page 2 for the first (horizontal) layer; then page 1 and page 2 for the second (vertical) layer. The text of the second (vertical) layer of pages 1 and 2 would therefore be placed *after* the text of page 2 of the transcript (i.e., the letter would be treated as having four pages) and endnotes should be used to explain the positioning of the text in the original document. The reading order numbers in the transcript would be [[1]] for the first layer (horizontal text) on page 1; [[2]] for the first layer (horizontal text) on page 2; [[3]] for the second layer (vertical text) on page 1; and [[4]] for the second layer (vertical text) on page 2.

LETTER HEADER

The header is the text which appears at the beginning of a letter before the salutation and main body text.

In the case of **original manuscript letters only**, the sender's address and the date are treated as separate paragraphs and should be aligned **right**. All other text in the header (and for that matter in the rest of the letter) should be aligned **left**.

1. Sender's Address

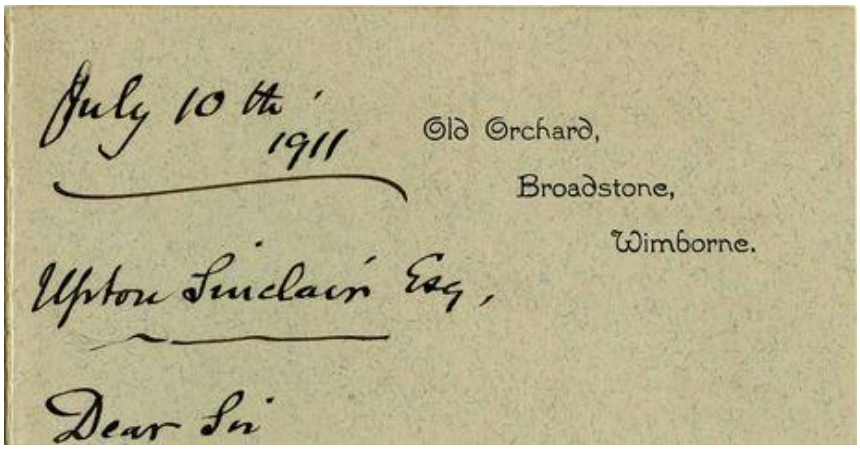
Please do not expand any words in the sender's address e.g., do not write "U[nited].K[ingdom]." If any words in the address are damaged or illegible and they cannot be surmised then use an editorial comment (e.g., "*[MS burned]*") (see HERE). If a word is illegible but it can be surmised then please insert it in angle brackets "< >" e.g., "<London>" (see HERE). If any words are misspelled then please give the correct spelling as an editorial insertion in the same way as you would for grossly misspelt words (see HERE) e.g., "Macasar [Macassar]". However, please ignore archaic spellings: do not insert a comment such as "Down *[Downe]*".

If there is an issue with the address which is not covered by this Protocol then use an endnote to point it out, or the Word Comments function to flag it up to the editor of the transcript.

In the case of **original manuscript letters** only, the sender's address should be aligned right. Each line of the address should be separated from the next by one paragraph mark (i.e., press the RETURN key once at the end of each line).

If the address is **printed or embossed** then it should be put into *italics* and it should always be placed as the **first text** of page 1 of the transcript (i.e., it should always follow the reading order number of page 1, i.e., "[[1]]"). Any handwritten original text which appears above or to one side of it should be separated from it by one blank line and placed below it.

For example:



The header information above would be transcribed as follows:

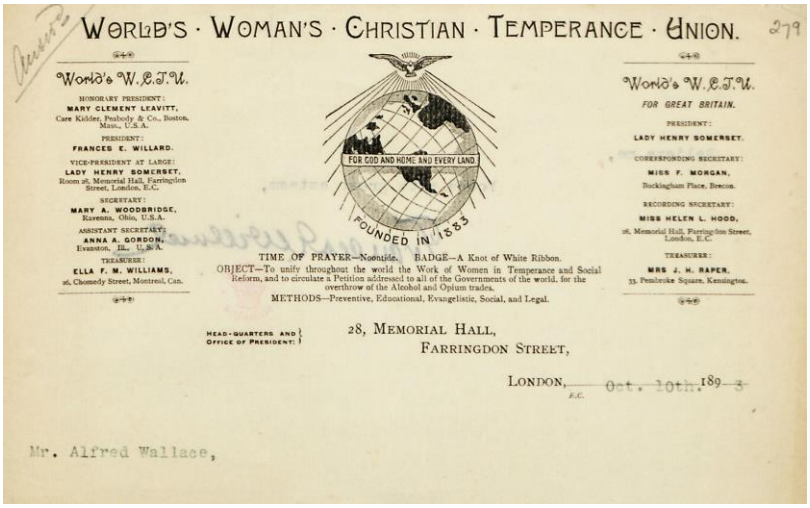
[[1]]

Old Orchard,
Broadstone,
Wimborne.

July 10th. 1911

Upton Sinclair Esq.

If other printed or embossed information is present in the letterhead, as in the example below, then it should be ignored. Please inform us about any such letterheads you find as we are making a list of them. Please transcribe the address in the way described above.


WORLD'S · WOMAN'S · CHRISTIAN · TEMPERANCE · UNION.

World's W.C.T.U.

HONORARY PRESIDENT:
MARY CLEMENT LEAVITT,
Care Kidder, Peabody & Co., Boston, Mass., U.S.A.

PRESIDENT:
FRANCES E. WILLARD.

VICE-PRESIDENT AT LARGE:
LADY HENRY SOMERSET,
Room 28, Memorial Hall, Farringdon Street, London, E.C.

SECRETARY:
MARY A. WOODBRIDGE,
Ravenna, Ohio, U.S.A.

ASSISTANT SECRETARY:
ANNA A. GORDON,
Evanston, Ill., U.S.A.

TREASURER:
ELLA F. M. WILLIAMS,
26, Chomedy Street, Montreal, Can.

FOR GOD AND HOME AND EVERY LAND

FOUNDED IN 1883

World's W.C.T.U.
FOR GREAT BRITAIN.

PRESIDENT:
LADY HENRY SOMERSET.

CORRESPONDING SECRETARY:
MISS F. MORGAN,
Buckingham Place, Brecon.

RECORDING SECRETARY:
MISS HELEN L. HOOD,
28, Memorial Hall, Farringdon Street, London, E.C.

TREASURER:
MRS J. H. RAPER,
33, Pembroke Square, Kensington.

TIME OF PRAYER—Noontide. BADGE—A Knot of White Ribbon.
OBJECT—To unify throughout the world the Work of Women in Temperance and Social Reform, and to circulate a Petition addressed to all of the Governments of the world, for the overthrow of the Alcohol and Opium trades.
METHODS—Preventive, Educational, Evangelistic, Social, and Legal.

HEAD-QUARTERS AND OFFICE OF PRESIDENT:
28, MEMORIAL HALL,
FARRINGDON STREET,
LONDON, E.C. Oct. 10th. 189-

Mr. Alfred Wallace,

The addresses of handwritten or typed **manuscript transcripts, drafts and published letters** should be transcribed as they are written and should be aligned **left** like the rest of the text i.e., they are not treated in any special way.

2. Date

The date on handwritten/typed **manuscript transcripts, drafts and published letters** (but not **original manuscript letters** - see below) should be written as it appears on the page and aligned left, like the rest of the text.

In the case of both manuscript and published letters, if the date is incomplete but the missing part is known, then please supply it, e.g., "May [18] 1890" (the square brackets denote an editorial insertion - see HERE for more information). An endnote (see HERE) will often be needed to explain how this was determined. However, if only the first two digits of the year are missing, e.g., "[18]90" then it is not necessary to create an endnote. If the date is ambiguous (e.g., "2 9 76", which could be 2 September or 9 February) then an endnote will be necessary to explain the ambiguity and whether or not it has been resolved.

In the case of **original manuscript letters** only the following applies: the date is treated as a separate paragraph and it should be separated from any text above it by a blank line, and aligned **right**. A blank line should follow it (press the RETURN key twice). It should always be separated from any text before or after it by blank lines - even if this text appears on the same line as the date in the original manuscript letter. If parts of a date are written on different lines, put all parts onto the same line of the transcript.

Example 1:

If the address and date appears on one line as follows:

Ternate, Moluccas, Oct. 6. 1858.

They would be formatted in the transcript as follows:

Ternate, Moluccas,

Oct. 6. 1858.

Example 2:

If the original letter reads:

Private

Sept 4 85
Berkeley Lodge
West Hill, Putney SW

The text would be formatted:

Private

Sept 4 [18]85

Berkeley Lodge
West Hill, Putney SW

SALUTATION (Greeting at beginning of letter)

In the case of **original manuscript letters** only the following applies: the salutation (e.g., "Dear Darwin,") is treated as a separate paragraph which should be separated from the text in the header above it by one blank line (i.e., press the RETURN key twice) and aligned left. A blank line should follow it.

The salutations of handwritten/typed **manuscript transcripts, drafts and published** letters should be written and formatted as they appear on the page and aligned left.

Please do not insert endnotes giving the names of the author of a document or the recipient of a letter - even if the salutation does not mention a name, e.g., it simply reads "Dear Sir". The names of these people will be given in the metadata for the document in our database.

PARAGRAPHS

Except for the exceptions noted above for **original manuscript letters**, paragraphs should be flush with the left-hand margin with a blank line between them (i.e., press the RETURN key twice after ending the paragraph). Special manuscript devices delimiting sections or paragraphs, such as blank spaces left between sections of text and lines drawn across the page, are treated as normal paragraph indicators and are not specially marked or recorded unless their omission would make the text unclear. For example, if a line drawn across the page denotes more than just a break between paragraphs and it is important to retain it then do so, see LINES ACROSS THE PAGE.

SPACING

Apparent errors in spacing in manuscript or published documents (e.g., "Bates said ," or "finished .") should be silently corrected, i.e., there is no need to record the correction.

TEXT IN THE MARGINS

Handwritten text on a manuscript which was written in the margins at the time of the manuscript's original composition should be inserted at the point in the transcript where it was intended to be read (if this can be ascertained). An endnote (see HERE) should be used to describe the physical position of this text in the manuscript.

For example, in some cases the final part of a multi-page letter may be written in the margin of the first page. This text should be transcribed as part of the **final** page of the transcript, but with an endnote stating that it was written in the margin of the first page (e.g., the marginal text might read "but[1] fortunately I escaped with my life!" and the endnote might read: "1. The text which runs from this point until the end of the letter is written vertically up the left margin of the first page of the manuscript.")

If the marginal text is clearly not meant to be part of the main text on the page (e.g., if it is a general comment about something in the main text of the manuscript) then please place an endnote number after the reading order number of the page in question and include the text in an endnote, rather than in the main body of the transcript.

LATER ANNOTATIONS

If it is believed that handwritten text was added after a manuscript was written either by the author or someone else (e.g., Wallace's son), then use endnotes

to record it. However, please ignore repository stamps and text written on the manuscript by repositories (e.g., repository reference numbers and folio numbers), **except** for page numbers, as noted above. Repository reference numbers are normally written in pencil at the head of a page or folio. Repository folio numbers are normally written in pencil in the top right-hand corner of the page or folio.

The only exception to recording later annotations in endnotes, rather than in the main body of the text, is to be found in manuscripts such as letter WCP764, in which the sender asked ARW several questions to which ARW replied by writing his answers on the same letter. Such manuscripts should be transcribed as if they were written by a single author, but endnotes should be added which explain what text is actually a later addition by ARW.

LISTS

Each line of text which is written in the form of a list should be separated from the next by a paragraph mark (press the RETURN key once at the end of a line). If a list has more than one column it should be treated as a table.

TABLES

Tables are reproduced as close to the original format as possible. Insert a table with the correct number of columns and rows into the transcript, and make the table borders visible or invisible to match the appearance of the original.

LINES ACROSS THE PAGE

If the author of a manuscript has drawn a line across a page to divide the text above and below it into different sections then please reproduce it by typing 20 underscore characters (unicode U+005F), i.e., "_____" Please insert a blank line to separate the 'underscore line' from the text under it (i.e., press the RETURN key twice).

HEADINGS AND SUBHEADINGS

Please transcribe these as they appear and insert a blank line above and below them. The heading styles in MS Word should not be used.

ILLUSTRATIONS

Any illustrations and diagrams that appear in a manuscript or publication should be omitted from the transcript. However, editorial comments should be made in the appropriate place in the text, which briefly describes them, e.g., "*[a sketch of a butterfly appears here]*".

VALEDICTION (The parting words at the end of a letter)

For **original manuscript letters** only, the valediction should be combined into a single line to save space, and the positions of line-breaks in the original should be marked by vertical bars (called "pipe characters") with a space on either side, i.e., " | " (this is probably on the same key as the "\" character on your keyboard). For example, "Believe me | Yours very faithfully | Alfred R. Wallace"

The valediction should be separated from the text above it by a blank line.

SIGNATURES

For **original manuscript letters** only which are actually signed by the author, please record the signature by transcribing the author's name in the form it appears in the signature, followed by "*[signature]*" (i.e., in square brackets and italicised). For example "Alfred R. Wallace *[signature]*" or "ARW *[signature]*". Do not underline the name of the person whose signature it is, even if it has been underlined by the author.

PROTOCOLS WHICH ARE EXCLUSIVE TO PUBLICATIONS

If a publication has endnotes or footnotes (which could be denoted by numbers or symbols), then please replace them with a WCP endnote number (see below) and give the text of the published footnote/endnote in the WCP endnote. For example, if the original published text reads:
"one of which* is, I think, the most beautiful thing I have yet taken", change the superscript "*" to a WCP endnote number, e.g., "one of which[1] is, I think, the most beautiful thing I have yet taken", and add an endnote reading:

1. A footnote on page 494 of the publication reads "This beautiful species I find to be the rare Callithea Sapphira, Hub., of which hitherto only one example appears to have existed in the collections in this country."

PROTOCOLS WHICH APPLY MAINLY TO MANUSCRIPTS

When transcribing manuscripts you should adhere as closely as possible to the original layout and spelling of the original, enclosing all text which is not part of the original in square or angle brackets, i.e., [ ] or < > (see below for details). Original spelling should be retained and misspellings should be indicated by inserting *[sic]* immediately after the misspelt word, e.g., "caterpiller *[sic]*" (or *[sic?]* if you are not sure). In cases of grossly misspelt words please supply the correct word in non-italicised brackets instead of inserting "*[sic]*", e.g., "evolooshun [evolution]". If an archaic version of a word is used in a manuscript (e.g., "compleat" instead of "complete"), then please add an endnote number to the **first use** of the word in the text (ignore subsequent occurrences) and give the modern version of it in an endnote (e.g., "2. Archaic form of "complete"").

INSERTED WORDS

When an author has inserted one or more words into the text, these should be transcribed in superscript and inserted into the text where the author intended that they should be read, e.g., "Darwin tells ^{me} that". Ignore any insertion marks such as "ʌ".

SPECIAL SIGNS (BREVIGRAPHS)

These should kept as written, e.g., "&" (and), "&c." (et cetera). Please be aware that "&" may look like "+". If it does then transcribe it as "&".

SYMBOLS & DIACRITICAL MARKS

"æ" is transcribed as "ae", "œ" is transcribed "oe", "Æ" is transcribed "Ae". Symbols, such as "♀", "♂" and "✓" should be transcribed as they are, as long as a Unicode symbol is available to represent them. Diacritical marks (e.g., "ā", "á", "ẽ", "ç") should be transcribed as they are.

APOSTROPHES

Please ensure you use the actual apostrophe symbol (') and not the single quotation mark symbol (‘…’) or grave accent (`) which both look very similar. If in doubt see http://www.babelstone.co.uk/Unicode/whatisit.html?

QUOTATION MARKS

Transcribe these as they are written. Use "…", never curly quotation marks “…” (called "smart quotes" in Microsoft Office programs). Single quotation marks are used for quotes within quotes and the apostrophe symbol (') should be used to represent these **not** the grave accent (`) or curly single quotes (‘…’). If in doubt see http://www.babelstone.co.uk/Unicode/whatisit.html?

PERIODS/FULL STOPS, DASHES & HYPHENS

Dashes, multiple periods/full stops etc. at the ends of sentences should be transcribed as written. If no punctuation mark is present at the end of a sentence then insert a period/full stop in square brackets, i.e., "[.]". Hyphenated words such as "go-between" are transcribed with a single hyphen as written.

Dashes should be written as a two hyphens (--) rather than en-dashes or em-dashes (**Important:** please ensure that your word processor does not automatically convert hyphens to dashes). If there is a series of dashes then separate the double hyphens with spaces, e.g., "-- -- --".

Dashes within sentences should also be transcribed as two hyphens, but dashes indicating that a word has been split between lines (usually words abutting the right-hand margin of the page) should be "silently" removed (e.g., write "butterfly" rather than "butt--erfly"). If a word is split between two

consecutive pages (e.g., "as- [[3]] cended") then transcribe it as a single word on the first of the two pages, e.g., "ascended [[3]]".

CAPITALISATION OF LETTERS

These should be kept as written. If the author made an error **it should be retained** and *[sic]* (or *[sic?]* if you are unsure) should be inserted immediately after the word, e.g., "wood. all *[sic]* the beetles". Note that this also applies to the scientific names of organisms (see HERE), so if a genus name or name of a higher-ranking taxonomic group is not capitalised in the text then do not alter it but instead draw attention to it by inserting *[sic]* or *[sic?]* after it, e.g., "heliconius *[sic]*" or "coleoptera *[sic]*".

MISFORMED LETTERS

If the author's intention is clear, write the correct letter. For example if the author has clearly inadvertently crossed a letter "l", then write "l", not "t". Unless there is uncertainty there is no need to transcribe misformed letters as they appear in the manuscript.

CROSSED OUT WORDS

Use strikethrough font to depict deletions which are still legible, e.g., "~~deleted~~" or partially crossed out words, e.g., "Co~~o~~leoptera" or "specimen~~s~~". See HERE for how to record illegible text.

UNDERLINING

When the author has underlined text this should be represented in underline font. Where the author of a manuscript has indicated greater emphasis by underlining a word or passage two or more times, the text should be rendered as **bold underlined.** Note that signatures should never be underlined, even if they have been (as stated in SIGNATURES above). When more than one consecutive word has been underlined, do not underline each word separately, e.g., if "the apparent motion" is underlined, depict it like this: "the apparent motion"; not like this: "the apparent motion". If only part of a word has been underlined then underline the entire word, e.g., "motion" should be transcribed as "motion".

PARENTHESES

Parentheses "( )" are transcribed if they appear in the original text. If the author used square brackets they should be changed to parentheses.

CATCHWORDS

If a word is written under the last line of text on one page and repeated at the top of the next, to show that one page follows the other, then endnote the first instance and do not transcribe the word twice, e.g., an endnote might read "3. "butterfly" is repeated as a catchword on page 3".

EDITORIAL INSERTIONS AND COMMENTS

Square or angle brackets should be used to enclose insertions and comments by the transcriber or editor in the transcribed text of **manuscripts and published** documents.

Regular square brackets [ ] are used for editorial **insertions**, whilst italic square brackets *[ ]* are used for editorial **comments**, which are themselves written in italic text. Angle brackets < > are used to insert **surmised text** in cases where the original text is damaged or otherwise unreadable. More detailed explanations follow. Note that whilst the instructions given below apply to manuscripts, not all of them apply to **published** documents, but it should be obvious which do not.

EDITORIAL INSERTIONS (non-italicised square brackets: [ ])

If possible, please supply text which the author has accidentally or deliberately omitted, and enclose it in non-italicised square brackets, e.g., "In the morning we went [to] the village" or "The plumage of this sp[ecies]. is most handsome". If you are uncertain include a question mark, e.g., "This sp[ecies?] has greatly enlarged mandibles."

As mentioned earlier, if the date of the letter is incomplete but the missing part is known then please supply it, e.g., [1890] (an endnote will probably be needed to explain how this was arrived at). In cases of grossly misspelt words please supply the correct word, e.g., "evolooshun [evolution]".

In the case of less common abbreviations and contractions please supply the missing part of the word(s), e.g., "y[ea]r" instead of "yr" and please retain any superscript letters, e.g., "rec[eive]^{d}". Sometimes superscript text is denoted by two ".." underneath the superscript letter(s). Please do not transcribe the ".." because they are simply signifiers of superscript.

In the case of abbreviations, the inserted text should be placed before the full stop of the abbreviation, e.g., "the butt[erfly]. flew rapidly"

Very common abbreviations and contractions which **do not** need to be expanded in transcriptions include the following:

ad lib., ad-lib. - *ad libitum*, "at one's pleasure" or "as you desire"
AD - Anno Domini (CE, Current or Common Era sometimes used)
BC - Before Christ (BCE, Before the Current or Common Era sometimes used)
c. - *circa*, "about"
cf. - confer, "compare"
do - ditto
Dr, Dr. - Doctor
E., e. - East, eastern
Ed., ed. - edition, editor
e.g. - *exempli gratia*, "by way of example"

Esq., Esqr - Esquire
etc. - *et cetera*, "and the rest", "and so on and so forth"
F., f. - folio
Ff., ff. - folios
fl. - floruit, "flourished" (when giving people's dates)
i.e. - *id est*, "that is"
Jr, Jun. - junior
Ltd - Limited (as in limited company)
M.D. - Doctor of Medicine
Mr, Mr. (or Mr.) - Mister
Mrs, Mrs. - Mistress
Messrs, Messrs. - Misters (often used in company names or referring to two or more men)
MS/ms, MS./ms. - manuscript
MSS/mss, MSS./mss. - manuscripts
Mt, Mt. - mount or mountain
N., n. - north, northern
N.B. - *Nota Bene*, "note"
No., no. - number
Nos., nos. - numbers
N.W., n.w. - north-west, north-western
P., p. - page
Pp., pp. - pages
Prof. - Professor
P.S. - *Post Scriptum*, for text written as an after-thought
q.v. - *quod vide*, "which see"
Revd - Reverend
Rd - road
S., s. - south, southern
Sr, Sen. - Senior
S.E., s.e. - south-east, south-eastern
S.W., s.w. - south-west, south-western
St - street
UK - United Kingdom
U.S., USA - United States of America
viz. - *videlicet*, "namely"
vol. - volume
vols - volumes
W., w. - west, western

Also, **do not extend** the abbreviations for currency denominations (e.g., £ s. d.), or widely-recognised abbreviations for weights and measures, length (e.g., ft), or days of the week or months (e.g., "Sept.").

Do not extend abbreviated author names of scientific names of organisms - see SCIENTIFIC NAMES below.

Do not extend common abbreviations used for place names such as "S. America", "N. America". Abbreviations for names of American states should be extended, apart from "Washington, D. C.", which is widely-recognised.

See HERE for a list of common abbreviations. You will need to extend ones which are **not** on the list above. If you encounter a very common abbreviation/contraction which you think should be included on the above list then please let us know.

EDITORIAL COMMENTS (italicised square brackets: *[ ]*)

Please enclose any comments you make in square brackets and italicise them plus the enclosed text, e.g., "*[MS burned]*". Please always use UK English spelling.

1. Uncertain Interpretation

If you are unsure whether you have read a word in a manuscript correctly, then place a question mark in square brackets directly after it, e.g., "Darwin*[?]*". Do not leave a space between this and the queried text.

2. Missing or Unreadable Text

In the case of damaged or illegible manuscript text, if no guess can be made about the missing word(s) (see above) an appropriate comment should be made, e.g.,

"*[2 words illeg.]*" (Note: "illeg." = illegible)
"*[MS burned]*"
"*[MS blotted]*ing Darwin!"
"sp*[MS illeg.]* Bates"

3. Foreign Words and Phrases

If a manuscript or published letter which is largely written in English contains foreign words or phrases, the translated version and the name of the language should be given in editorial comments, e.g., "foi-se embora *[Portuguese: went away]*" or "Your faithful friend and quondam *[Latin: erstwhile]* companion".

SURMISED TEXT (angle brackets: < >)

If any text in a manuscript is mutilated or illegible but a word or phrase can be deduced from the context, then please insert it in angle brackets "< >", e.g., "My son <William> wrote to you" Uncertain guesses should be followed by a question mark, e.g., "Bates says that the local ladies are very <attractive?>".

PLACE NAMES

The spelling of place names should be checked using the resources HERE.

If a name is misspelt then please give the correct spelling as an editorial insertion in the same way as you would for grossly misspelt words, e.g., "Macasar [Macassar]".

If the name of a place has changed since the time when the text was written, then the modern name should be inserted as an editorial comment, e.g., "Gilolo *[Halmahera]*". This should be done only for the **first occurrence** of the place name in the text. Do not do this for letter headers, just for place names in the main body of the text. The "Master List of Place Names" document contains a list of all the old names and their modern equivalents which the WCP has found to date (ask a member of WCP staff for access).

SCIENTIFIC NAMES

The spellings of the scientific names of plants, animals and other organisms should be checked using the resources HERE. If a name is misspelt then please give the correct spelling as an editorial insertion in the same way as you would for grossly misspelt words, e.g., "Heliconus [*Heliconius*]". Note that all genus, species or subspecies names you insert in "[...]" should be in italics (see HERE), but never italicise scientific names transcribed from manuscripts, unless it is a typed document and italic font has been used (in handwritten manuscripts they are not italicised, but they are often underlined).

If an abbreviated name of the author of the scientific name is given following the name then please retain it as it originally appears. Do not expand the author name or provide an endnote. E.g., for the species name "Papilio machaon L.", the cited author of the taxonomic description "Linnaeus" should be retained in it's original contracted form "L."

If a scientific name is abbreviated then please supply the missing part of the name as you would for abbreviated words, e.g., "P[apilio]. machaon L."

ENDNOTES

INTRODUCTION

Endnotes are used for a variety of purposes, e.g.:

- for comments that identify places, events etc. mentioned in the text
- to record information about the layout of the text (see HERE)
- to record later annotations (see HERE)
- for succinct biographies of people mentioned in the text (we call these "endnote biographies") (see HERE)
- for full reference citations which expand brief references made in the text to published works (e.g., the full reference citation of "Darwin's book"), or quotations from published works (see HERE)

Please include concise endnotes to identify places, people, events etc., but avoid interpreting the text, e.g., avoid endnotes like this: "ARW probably got this idea from reading Chambers' book in 1842". Comprehensive pieces of original research would be for a biographer of ARW to undertake. Our endnotes are simply to help the reader understand what has been written in the text.

Another example: If a letter reads "We came by Railroad to Hertford and thence travelled to Hoddesdon[1]…", do not include an endnote such as this: "1. ARW and his brother continued their journey to Hoddesdon by coach (Wallace, A. R. 1905. *My Life: A Record of Events and Opinions*, **1**. London: Chapman & Hall, Ltd. [p. 140])." This endnote is not appropriate as it provides information about something which the reader does not need to know in order to understand what is written in this letter. It is the sort of information which would be more appropriate to include in a biography of ARW.

There is no need to create endnotes for information which is general knowledge, or which can easily be found on the Internet or elsewhere. For example, avoid endnotes such as: "3. A mule is the offspring of a male donkey (jack) and a female horse (mare)." Please use your judgment about whether an endnote is necessary.

References should always be given for information included in endnotes, **except** in the case of biographical information and the exceptions mentioned below. Wikipedia is a useful starting point for research, but please try to confirm any information you wish to include in an endnote using more trusted academic sources. Always write the endnote in your own words and cite the source to avoid plagiarism, unless the information is simply basic data which cannot easily be presented in any other way. References given in endnotes should always be cited in full (see HERE), except for quotations from the Christian Bible, which should be cited as follows: number of book (if relevant), book, chapter, verse: and quotation (if necessary), e.g., "A quotation from the Bible, Romans 7. 19: "For the good that I would I do not: but the evil which I would not, that I do"", or simply: "A quotation from the Bible, Romans 7. 19.", if the quotation is cited word for word.

As stated earlier, please do not include endnotes giving the names of the author of a document or the recipient of a letter - even if the salutation does not mention a name, e.g., it simply reads "Dear Sir". The names of these people are given in the metadata for the document.

For examples of how endnotes should be written please see the examples of transcripts and their endnotes HERE.

HOW TO FORMAT ENDNOTES

Endnotes should be placed at the bottom of the final page of the transcript and referenced using superscript numbers inserted into the appropriate place in the text, i.e., directly after the word or the text they refer to. For example, in order to explain who a person referred to simply as "Herbert" is, insert a superscript "1" directly after the name (i.e., "Herbert[1]") and write an endnote at the end of the document, which might read: "1. Wallace, Herbert Edward (1829-1851). ARW's brother." (See HERE for more information about how to write endnote biographies).

If an endnote number is being added to superscript text, then the number should be in bold to distinguish it from the other text, e.g., "butterflies**1**" If the endnote refers to a sentence or quotation, then the number should be placed directly after that block of text and after any punctuation except a dash. For example, "William really likes my new book.[1]", with an endnote reading "1. ARW's son William likes ARW's book *Darwinism* (Wallace, A. R. 1889. *Darwinism; An Exposition of the Theory of Natural Selection With Some of Its Applications*. London & New York: Macmillan & Co.)."

The heading "**ENDNOTES**" should be added above the first endnote and blank lines should be inserted above and below it.

Endnotes should be separated from each other by a blank line (press the RETURN key twice after finishing an endnote before beginning the next).

Endnote numbers should only be used sequentially in the text. For example, if something has been explained in an endnote and the same point occurs again later in the manuscript, the same endnote number should **not** be used for both. Usually the second occurrence should not be endnoted, but if a point does need to be explained again then an endnote referencing the first endnote may be used, e.g., "7. See endnote 3 above".

Note: please do NOT use MS Word's automatic numbered list feature to create endnotes (or other numbered lists) - type each number yourself.

If text from the manuscript is quoted in an endnote then enclose it in double quotation marks. Single quotation marks (represented by the apostrophe symbol (')) are used for quotes within quotes.

INFORMATION TO INCLUDE IN ENDNOTES

1. Layout of the Manuscript Text

If the reading order of a letter differs from the actual layout of the pages (e.g., the letter has multiple layers of text), then please record this by inserting an endnote number after the reading order number (e.g., "[[4]][3]") and then explain the situation in an endnote, e.g., "3. The remaining text of the letter is written vertically over the first layer of text on page two of the manuscript." Please try to explain this as clearly and as simply as possible.

2. Later Annotations on Manuscripts

Endnotes should also be used to record any text, handwritten or typed, which was added after the manuscript was originally written, whether by the author of the manuscript or another person. As explained earlier, reference or folio numbers written on the manuscript by the repository (usually in pencil) should not be recorded.

Use a superscript number in the text as near to the place that the text in question appears, and then write an endnote which lists the text, e.g., "2. Text

in the hand of William Wallace in the top right corner of the page reads "Letter number 20"".

Handwritten lines in the margins of the page, or lines in the text which were added at a later date (e.g., by ARW when he was writing his autobiography) and which are not associated with handwritten text, should be noted but not described in detail. Place an endnote number after the reading order number of the page, e.g., "[[1]][1]" and write an endnote which reads something like this: "1. There are lines in blue pencil in the margins marking certain passages of the text." Textual annotations associated with any line should be recorded and the position of the line described, e.g., "2. A hand written annotation in the left margin reads "Brecon" and a line has been drawn from it to the word "Beacons" in the letter text."

3. Endnote Biographies

All endnote biographies which the WCP team have written to date are contained in the "WCP Endnote Biographies Master List" document - please ask a member of WCP staff for access. If you need to create a new one then please follow the instructions below.

When you create a new endnote biography to explain who a person mentioned in the text is, please type the person's full name, followed by their birth and death years (if known), and then a short (25 words or less) remark about their profession etc., which you think will help to identify them and help the reader understand who is being discussed.

a) Names of people

The name of the person is the full name used by that person at the time of their death. Any commonly used nicknames or pseudonyms are noted in brackets and quotes ("...") after the forename(s) and any earlier surname(s) is/are noted in brackets (...) after the surname, using "née" to indicate a maiden name, "formerly" to indicate a change for a reason other than marriage, and "then" to indicate any earlier married names.

Some examples are:

Alexander, Patrick Proctor ("Pat")
Allingham (née Paterson), Helen Mary Elizabeth
Sims (née Wallace), Frances ("Fanny")
Comerford-Casey (formerly Casey), George Edward
de Grey (née Withers then Gwytherne-Williams), Marion

Personal names that begin with particles (articles, prepositions, or other prefixes) should be alphabetised according to the customs of the country and its language.

When creating endnote biographies with French and Belgian surnames, the preposition *de* usually should be ignored in alphabetization, while the article *la* should not.

E.g., "La Salle, Antoine de"

Italian and Dutch surnames should always retain the preposition *de* as below:

E.g., "de Vries, Hugo"

However, the *de* in Spanish surnames should be inverted.

E.g., "Cervantes, Miguel de"

In Romance languages, such as French, Spanish, Italian and Portuguese, particles that are also prepositions should **not** be capitalized.

The prepositions *von* and *van* in Dutch and German surname should always be inverted.

E.g., "Winkle, Anthony Stuart van"

b) Birth and death years

Please use this format: "(1820-1890)", or if neither year is known use "(-)" (in this case the "-" should have a space before and after it).

You may use "c." if the year is an approximate one, or "?" if the year is uncertain, e.g., "(c. 1820-c. 1890)" and "(1820?-1890)".

Please never abbreviate years, e.g., do **not** write "(1820-90)".

If only the year of birth is known it should be recorded like this: "(1820-)". Note the space after the "-". Likewise if only the year of death is known it should be recorded like this: "(-1890)". Please do **not** use "b." (birth) or "d." (death), e.g. "(b. 1820)" or "(d. 1890)".

If neither the years of birth or death are known, but you know that the person was alive in a particular year use "fl." (*flouirt,* flourished) to indicate an approximate period of activity. Always give the decade the year falls into, e.g. if the year was 1857, then state "1850s".

E.g., "Lima, João Antonio de (fl. 1850s). Portuguese trader." or "Cimão, Manoel Ricardo de (fl. 1850-1870s). Brazilian river pilot."

If you know the person was alive in more than one decade then give a range, e.g., if you know the person was alive in 1856 and in 1887 then state "(fl. 1850s-1880s)".

c) Biographical information

The biographical information should be concise, ideally under 10 words long and should never exceed 25 words (excluding the person's name and dates of birth and death).

Please include the nationality of the person first. Always use "British" for people from England, Wales, Scotland and Northern Ireland. Do not include people's professional affiliations (e.g., "FLS") or awards such as "FRS".

People's titles (Reverend, Sir, Dr, Professor, etc.) should not be included in the endnote biographies unless the title was the name they habitually used up until the time of their death, and it does not include their given name(s), e.g. "Lord Clarendon" should be included for George William Frederick Villiers, as that was what he was usually called. In this case the endnote biography might read "Villiers, George William Frederick (1800-1870). Lord Clarendon; British diplomat and statesman; Foreign Secretary for three periods between 1852 and 1870."

Concise details on important posts should be noted, particularly if the position relates to ARW's correspondence. For example, ARW corresponded with Abraham Dee Bartlett about obtaining live Birds of Paradise for the Crystal Palace Company, so his endnote biography might read:

"Bartlett, Abraham Dee (1812-1897). British taxidermist; Superintendent of the Natural History department at Crystal Palace 1852-59; Superintendent of London Zoo 1859-97."

Please try to be as concise as possible and use abbreviated dates as above. For example, do **not** write "appointed Superintendent in 1852 at the Natural History department at Crystal Palace and held the post until 1859".

If the endnote biography lists several positions, use semicolons rather than commas or sentences.

References should **not** be included for biographical information in endnote biographies. However, the references used to obtain the information MUST be recorded in the "WCP Endnote Biographies Master List".

The format references should follow is given in REFERENCES below.

For more information about writing endnote biographies please see the "WCP Endnote Biographies Master List".

NAMES OF ORGANISMS

Scientific **species names** of plants, animals and other organisms given in endnotes should be written in italics, which is the standard practice, e.g., *Apis mellifera*. The genus name is first and must start with a capital, the species name is second, and the subspecies name (if there is one) is third. Species

and subspecies names always start with a lower-case letter, e.g., *Zeuxidia amethystus wallacei* (*Zeuxidia* is the genus, *amethystus* the species, and *wallacei* the subspecies). The names of higher-ranking taxonomic groups (e.g., orders or families) always begin with a capital but are not italicised, e.g., Coleoptera (the name of the order to which beetles belong); Papilionidae (the Swallowtail family of butterflies).

Endnotes are not used to give modern versions of scientific names mentioned in the text of a manuscript or publication, so avoid endnotes like this: "*Aus bus* is now regarded as a junior subjective synonym of *Xus yus*".

When a scientific name is given for a plant or animal species in a manuscript or publication, there is often no need to create an endnote giving the common (vernacular) name for the species in question. However, in some cases an endnote might be appropriate in order to help a reader understand what the organism is. For example, if ARW was writing about his quest to find "*Cicinnurus regius*", it would be helpful to include an endnote explaining that this is in fact "The King Bird-of-paradise", or if he listed several scientific names of beetles but did not explain what kind of organism they were, an endnote reading "These are all Coleoptera (beetles)" would be helpful. Judgment is needed - no hard and fast rules can be given.

Common (vernacular) names of plants and animals given in endnotes should have the initial letter of each word in capital letters, but words after hyphens should be in lower case unless they are proper nouns, e.g., "King Bird-of-paradise", "Bush-cricket", "Javan Banded Pitta". If a common name is written in the text of a document with lower case initial letters then do not correct or endnote this.

Also see SCIENTIFIC NAMES OF PLANTS AND ANIMALS.

ABBREVIATIONS AND ACRONYMS USED IN ENDNOTES

- If a word has been contracted, rather than abbreviated, the contraction should not be followed by a full stop, e.g., Dr, Mr, vols, with the exception of no. (number) and nos. (numbers).
- With lower-case abbreviations for phrases consisting of one or more words, there should be a full stop after each letter and no spaces, for example, "i.e." (*id est*) and "e.g." (*exempli gratia*).
- No full stops are required in capitalised abbreviations of acronyms for works of reference or journals (both in italics) or series (not in italics), e.g., OED, *TLS*, or for countries, institutions, societies and organisations, e.g., UK, NHM, ARA, UN
- Names of months other than May, June and July, should be abbreviated to three letters followed by a full stop, except for September which should be abbreviated as "Sept." Dates should be expressed in the format "23 Apr. 2013". Names of months which are part of references should not be not abbreviated.
- Use the following abbreviations: ms for "manuscript", mss for "manuscripts", *c*. (in italics) for "*circa*"

- Names of ships should be placed in italics.
- Use the acronym ARW to refer to Alfred Russel Wallace.

For further guidance on abbreviations, also on dates, numbers, currency and weights and measures, see the MHRA Style Guide, sections 4 and 8: http://www.mhra.org.uk/pdf/MHRA-Style-Guide-3rd-Edn.pdf

See the following for a very full list of abbreviations and acronyms: https://www.abbreviations.com/

REFERENCES

All references to articles, books etc which the WCP team have written to date are contained in the "Master List of References" document - please ask a member of WCP staff for access. If you need to create a new one then please follow the instructions below.

1. The Data Elements Which Make Up a Reference

The names of the data elements described below are the names of fields in the WCP's database. A field may be used to contain slightly different data in different types of references, so sometimes a field name may not seem entirely appropriate. For example "Year_Printed" is a good descriptive name for this field when used for printed articles, but not really for website articles. However, we have to use the same field for both.

Author(s): Name(s) of author(s). Surnames first, followed by initials, e.g., "Catchpole, C. & Beccaloni, G. W.". If an author is the editor of the book then include "(Ed.)" or "(Eds"), e.g., "Smith, C. & Beccaloni, G. W. (Eds)", or if there is only a single editor: "Beccaloni, G. W. (Ed.)"

In_Author: Name(s) of the book author(s)/editor(s), preceded by "*In*: ", e.g., "*In*: Smith, C. & Beccaloni, G. W. (Eds)" Only do this for citations of chapters of books which are edited compilations of the work of a number of authors. Please do not cite individual chapters if the book is not an edited work - simply cite the entire book.

Year_Printed: The year printed on the publication. Use "n.d." ("no date") if the year of publication is not given and is unknowable.

[Year_Published]: Include this only if the year the item was actually published in differs from the year printed on the publication. It should be in square brackets.

Article_Title: Titles of articles, book chapters, websites and manuscripts. These should be in sentence case, i.e., in lower case, apart from proper nouns which should have the first letter capitalised.

***Publication*:** Names of journals and websites. These should be in title case and in italics (see examples below).

***Book_Title*:** Titles of books and pamphlets. These should be in title case and in italics (see examples below). Use APA style (an online converter may be found here: https://capitalizemytitle.com). If the title is in a language other than English then do not translate it into English.

Edition: The edition of a book (e.g., "2nd edition"). Only record this if there is more than one edition of the book. If the edition is not stated in the book, it is safe to assume that it is the first edition, and it does not need to be included in the citation.

Series: The journal series number, e.g., "2nd series" or "n.s." (abbreviation for "new series").

Volume: The volume/issue number of journals, multi-volume books etc. If this is given in Roman numerals then convert it into Arabic e.g., "ix" becomes "9". The volume number should be written in bold. Never prefix it with "vol." e.g., write "**1**" not "vol. 1" and always give the actual volume you are referencing and not the entire set of volumes e.g., state "**2**" not "**1-9**". Note that if a serial publication like a newspaper does not have a volume/issue number then give the publication date instead e.g., "3 March 1882".

(Part): The part number of journals, newspapers etc. It should be placed in brackets. There will only be a part number if there is also a volume number. If the reference just has one number then assume it is a volume number.

Page_Range: The page number sequence of the entire article or book chapter. We do not record the total number of pages that books have. If the page numbers are Roman numerals then please give these, e.g., "i-x, 1-336".

[Page_Published]: The actual page(s) the information you are referring to is published on. It should be placed in square brackets and preceded by "p. " (page) or "pp. " (page range). If the page numbers are Roman numerals then please give these, e.g., "pp. iv-x".

Publisher: Place of publication and country, followed by a colon and then the name of publisher, e.g., "Oxford, UK: Oxford University Press". Do not state the country name if the place of publication is the capital city of a country, or if more than one city is listed e.g., "London & New York"

<Website URL>: For online articles: the full url of the Web page (e.g., "http://en.wikipedia.org/wiki/Charles_darwin"), unless it is behind a paywall. If it is then only give the url of the website itself, e.g., "<http://www.ancestry.co.uk>". The url should be in angle brackets.

[Date_Accessed]: The date you accessed a website. It should be in square brackets.

NOTES:

Anonymous and pseudonymous works

If the text is written anonymously and the author's real name cannot be identified with any certainty use the abbreviation "Anon" instead. E.g.,

Anon. 1868. A curious case of mistaken identity. *British Quarterly Review*, **47:** 434-474.

If the text is written under a *nom de plume* then enter the author's real name in square brackets if you know it e.g.,

[Wilson, C. A.]. 1852. *Adelaide Morning Chronicle*, **1**(104): 165-168. [p. 167]

If the text is written under a pseudonym and the author's real name is not known enter the pseudonym in double quotation marks. E.g.,

"Snuff". Our Black Brother. *The Clarion*, **781**: 5.

Letters or quotes from letters published in articles or books

If a letter or a quote from a letter is published in an article or book then the reference to it will be the article/book that it is published in. E.g., an ARW letter in an article published by Charles Algernon Wilson in the *Adelaide Morning Chronicle* should simply be cited as:

[Wilson, C. A.]. 1852. *Adelaide Morning Chronicle*, **1**(104): 165-168. [p. 167].

Do not cite it as:

Wallace, A. R. *In:* [Wilson, C. A.]. 1852. *Adelaide Morning Chronicle*, **1**(104): 165-168. [p. 167].

2. Reference Types and How to Format Them

- Where the reference is a digital scan of a published article or book available on an online archive such as JSTOR, there is no need to give the source of the electronic version or the date accessed, e.g., do **not** state the url or the date accessed as in this example: "Farlow, W. G. 1893. Alphonse de Candolle. *Proceedings of the American Academy of Arts and Sciences*, **28**: 406-411. <https://www.jstor.org/stable/pdf/20020542.pdf> [accessed 12 June 2018]."

- Digital Object Identifiers (DOIs) should only be given for digital-only publications which have been assigned such numbers (see below).

- As detailed above, the name of the publication ("Publication" and "Book_Title" fields) should be in italics.

- The citation method described below is an 'in-house' style developed for our needs, which combines elements of a number of different referencing styles. The references below are hypothetical examples.

a) Printed articles

Format: Author(s). Year_Printed [Year_Published]. Article_Title. *Publication*, Series, **Volume**(Part): Page_Range. [p. Page_Published]

Example: Stevens, S. 1849 [1850]. Journey to explore the province of Pará [extract from a letter dated 23 Oct., Pará, from Wallace and Henry W. Bates to Samuel Stevens, their collections sales agent]. *Annals and Magazine of Natural History*, 2nd series, **3**(13): 74-75. [p. 74]

b) Printed books

Format: Author(s). Year_Printed [Year_Published]. *Book_Title*. Edition. Volume. Publisher. [p. Page_Published]

Example: Marchant, J. (Ed.). 1916 [1917]. *Alfred Russel Wallace; Letters and Reminiscences*. 2nd edition, **1**. London & New York: Cassell & Co. [pp. 467-468]

c) Chapters of printed books where the book is an edited compilation of the work of several authors

Format: Author(s). Year_Printed [Year_Published]. Article_Title. Page_Range. *In*: In_Author. *Book_Title*. Edition, Volume. Publisher. [p. Page_Published]

Example: Mallet, J. 2008 [2009]. Wallace and the species concept of the early Darwinians. 102-113. *In*: Smith, C. & Beccaloni, G. W. (Eds). *Natural Selection and Beyond: The Intellectual Legacy of Alfred Russel Wallace*. 2nd edition, **1**. Oxford, UK: Oxford University Press. [p. 103]

d) Websites & digital-only publications, including online catalogues

Format: Author(s). Year_Printed. Article_Title. *Publication*. <Website URL> [Date_Accessed]

Examples:

Beccaloni, G. W. 2009. Wallace's genealogy. *The Alfred Russel Wallace Website*. <http://wallacefund.info/wallaces-genealogy> [accessed 15 June 2018]

Smith, C. H. 2011. Wallace, Alfred Russel (1823–1913). *Oxford Dictionary of National Biography*. <https://doi.org/10.1093/ref:odnb/36700> [accessed 14 June 2018]

Beccaloni, G. 2014. Trouble with tiger beetles: Singapore Science Centre's Wallace exhibition spreads tiger beetle myth. Version 1.2 (April 2014). *ResearchGate.* <http://doi.org/10.13140/2.1.1664.5122> [accessed 15 June 2018]

Wallace, A. R. 1846. [WCP340.340: transcript of letter to Henry Walter Bates, dated 11 April 1846]. *Wallace Letters Online*. <http://www.nhm.ac.uk/research-curation/scientific-resources/collections/library-collections/wallace-letters-online/340/340/T/details.html> [accessed 16 April 2014]

Wallace, A. R. 1868. [DCP 5848: transcript of letter to Charles Darwin, dated 7 February 1868]. *Darwin Correspondence Project*. <http://www.darwinproject.ac.uk/DCP-LETT-5848> [accessed 15 June 2018]

Natural History Museum. n.d. Carruthers; William (1830-1922). *Museum Archives Online Catalogue*. <http://www.nhm.ac.uk/CalmView/record.aspx?src=CalmView.Persons&id=PX983> [accessed 20 June 2018]

Bibliothèque nationale de France. n.d. Georges Louis Leblois (1825-1898). *Data.bnf.fr*. <http://data.bnf.fr/ark:/12148/cb13270786v> [accessed 21 June 2018]

West Middlesex Family History Society. n.d. [Transcript of entry for marriage of Eleanor Mary French to George Silk, 21 August 1821, Kensington]. Greater London Marriage Index. *Find My Past.* <findmypast.co.uk> [accessed 16 April 2018]

Find A Grave. 2018. Sarah Smith *Harris* Pickett. *Find A Grave.* <https://www.findagrave.com/memorial/33155826> [accessed 25 June 2018]

The International Plant Names Index. 2005. Bridges, Thomas Charles (1807-1865). *The International Plant Names Index.* <http://www.ipni.org> [accessed 25 June 2018]

The Plant List. 2013. *Drepanophyllum*. *The Plant List*. <http://www.theplantlist.org/1.1/browse/B/Phyllodrepaniaceae/Drepanophyllum/> [accessed 26 November 2018]

Notes:

- "Article_Title" is the title (or closest thing you can find to a title) of the web page you are citing. If no title exists, or you wish to cite key information present on the page in question which is not intended to be

a title, then please enclose it in square brackets as in the above examples.

- The last two references above show how to cite metadata and transcripts from online archives such as *Wallace Letters Online* or the *Darwin Correspondence Project*'s website. If you want to specifically refer to digitised images of the original documents, or to the originals themselves, then see below.

- Digital Object Identifiers (DOIs) should only be given for digital-only publications which have been assigned such numbers. Regard the website which published the document and assigned the DOI as the publisher and cite the DOI as a url (the url would be "http://doi.org/" followed by the DOI number), e.g., for the pdf of a digital-only publication on *ResearchGate* with a DOI listed as "DOI: 10.13140/2.1.1664.5122", the publisher and url would be "*ResearchGate* <http://doi.org/10.13140/2.1.1664.5122>"

- If the website you wish to cite has a paywall and the full url of the item you are citing is behind it, then only give the url of the website itself, e.g., *Ancestry*. <http://www.ancestry.co.uk>.

e) Manuscripts

Original manuscripts examined in a repository:

Format: Author(s). Year_Printed. Article_Title.

Examples:

Census. 1901. 1901 England census for George Charles Silk, London, Charterhouse, District: The Charterhouse. The National Archives of the UK: RG 13/248, f. 103, p. 5.

Wallace, A. R. 1846. Letter to Henry Walter Bates, dated 11 April 1846. Natural History Museum, London, UK: WP1/3/11.

Wallace, A. R. 1854-1861. Field Notebook. Linnean Society of London: LINSOC- MS179.

Digital images of a manuscript which are part of an online compilation (e.g., *Ancestry*):

Format: Author(s). Year_Printed. Article_Title. *Publication*. <Website URL> [Date_Accessed]

Examples:

Census. 1901. 1901 England census for George Charles Silk, London, Charterhouse, District: The Charterhouse. The National Archives of the UK:

RG 13/248, f. 103, p. 5. *Ancestry*. <http://www.ancestry.co.uk> [accessed 14 June 2018].

St John, Hackney. 1813-1823. London, England, Church of England Births and Baptisms, 1813-1917 for Conrad Loddiges. London Metropolitan Archives: Church of England Parish Registers, 1754-1906, p82/geo1/005. *Ancestry*. <https://www.ancestry.co.uk> [accessed 7 January 2019].

Wallace, A. R. 1846. Letter to Henry Walter Bates, dated 11 April 1846. Natural History Museum, London, UK: WP1/3/11. *Wallace Letters Online*. <http://www.nhm.ac.uk/research-curation/scientific-resources/collections/library-collections/wallace-letters-online/340/340/S/details.html> [accessed 16 April 2014]

Notes:

- "Year_Printed" may be a range, e.g., "1856-1860".

- "Article_Title" is the title (or closest thing you can find to a title) or a concise description of the document, followed by the name of the repository and the document's finding number etc., if these are present.

USEFUL RESOURCES

PERSONAL NAMES

When trying to decipher the spellings of names of people mentioned in letters the following list on Charles Smith's Wallace Page website might be useful: http://people.wku.edu/charles.smith/wallace/names.htm You might also try Wikipedia, or the Oxford Dictionary of National Biography (http://www.oxforddnb.com/), if you have access to it.

PLACE NAMES

The search systems on Smith's website (see bottom of this page: http://people.wku.edu/charles.smith/home.htm) and Wallace Online are very useful for checking the spellings of place names, since they search through the text of most of Wallace's publications, where the name you are interested in might have been mentioned. Also see http://wallacefund.info/content/chronology-wallaces-travels-malay-archipelago and Columbia Gazetteer of the World.

To check whether the name of a place is still in use, or whether another name is now used instead, please search for the place name in Wikipedia. If it is a name of a place in the 'Malay Archipelago' then please search for it HERE.

SCIENTIFIC NAMES OF PLANTS AND ANIMALS

Please check the spelling of scientific names of plants and animals as follows:

i. Go to Google Books.
ii. Click Tools (underneath the search bar), and go to where it says "Any time". Select "19th Century" from the dropdown list.
iii. Search for the name, and if it appears in various scientific publications of the day then accept the spelling. Note that there's no need to record the source(s) in which the name is listed. Also note that if there are only one or two mentions of the name they may be misspellings so try the other sites below.

The search systems on Smith's website (see bottom of this page: http://people.wku.edu/charles.smith/home.htm) and Wallace Online are also very useful for checking the spellings of scientific names of plants and animals.

Other useful websites are: IPNI and The Plant List for spellings of the scientific names of plants; Index Animalium and Catalogue of Life to check spellings of animal scientific names. For butterflies and moths use funet and for birds Avibase.

OTHER

Use Word by Letter to help figure out what a word you are trying to interpret might be.

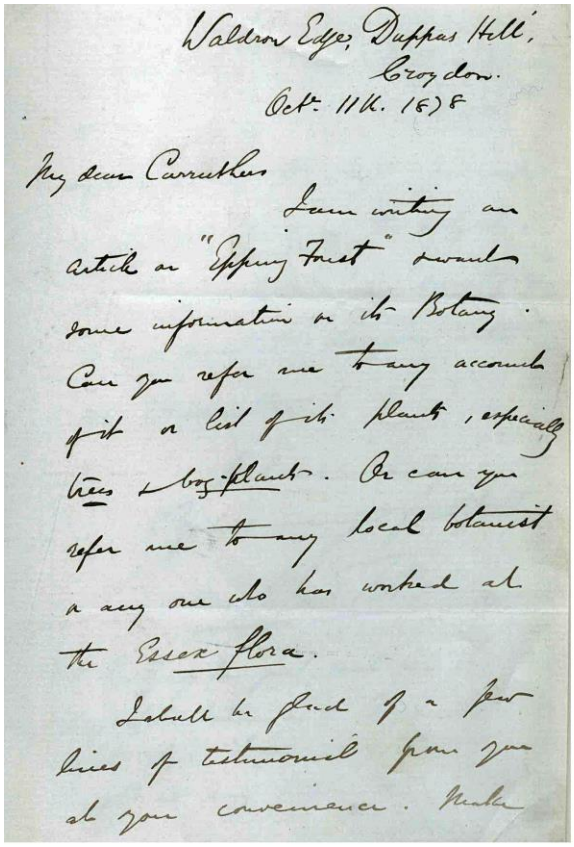
SAMPLE TRANSCRIPT

Sample transcript of an original manuscript letter, showing paragraph marks. An image of the manuscript is shown below the transcript.

[[1]]¶
¶

Waldron·Edge,·Duppas·Hill,¶
Croydon.¶
¶
Oct^{r}.·11th.·1878¶
¶

My·dear·Carruthers¶
¶
I·am·writing·an·article·on·"Epping·Forest"[1]·&·want·some·information·on·its·Botany.· Can·you·refer·me·to·any·accounts·of·it·or·list·of·its·plants,·especially·trees·&·bog-plants.·Or·can·you·refer·me·to·any·local·botanist·or·any·one·who·has·worked·at· the·Essex·Flora.¶
¶
I·shall·be·glad·of·a·few·lines·of·testimonial·from·you·at·your·convenience.·Make· [[2]]·it·short·&·almost·wholly·referring·to·my·having·had·practical·experience·of· planting,·&·made·a·special·study·of·the·subject,·as·I·hear·that·being·"scientific"·is· my·greatest·danger·with·the·Committee!¶
¶
Believe·me·|·Yours·very·faithfully·|·Alfred·R.·Wallace·*[signature]*¶
¶
P.S.·Asa·Gray[2]·has·just·sent·me·his·delightful·lecture·on·the·Temperate·Forests· which·I·am·going·to·use·largely·in·my·paper.¶
¶
A.R.W.·*[signature]*¶
¶
ENDNOTES¶
¶
1.·Epping·Forest·is·a·2,400·hectares·(5,900·acres)·area·of·ancient·woodland·to· the·north-east·of·London,·UK.¶
¶
2.·Gray,·Asa·(1810-1888).·American·botanist.·Fisher·Professor·of·natural·history,· Harvard·University,·1842-1888.¶

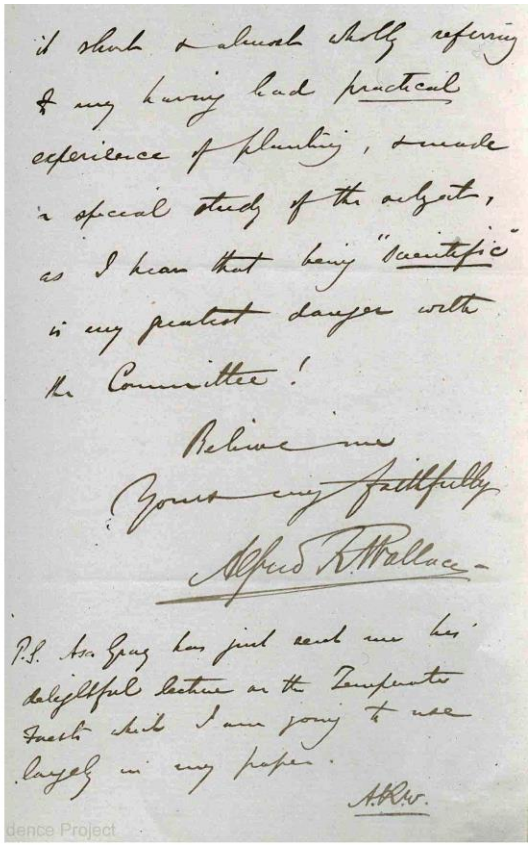


Waldron Edge, Duppas Hill,
Croydon.
Oct. 11th. 1878

My dear Carruthers

I am writing an article on "Epping Forest" & want some information on its Botany. Can you refer me to any accounts of it or list of its plants, especially trees & bog plants. Or can you refer me to any local botanist or any one who has worked at the Essex flora.

I shall be glad of a few lines of testimonial from you at your convenience. Make



it short & almost wholly referring & my having had practical experience of planting, & made a special study of the subject, as I hear that being "scientific" is my greatest danger with the Committee!

Believe me
Yours very faithfully
Alfred R. Wallace

P.S. Asa Gray has just sent me his delightful lecture on the Temperate Forests which I am going to use largely in my paper.

A.R.W.

This document was created by Dr George Beccaloni (Director of the Wallace Correspondence Project) in July 2011 and last revised by him in November 2020. It is licensed under Creative Commons Attribution-NonCommercial-ShareAlike 3.0 Unported

Please cite it as:

Beccaloni, G. W. (Ed.) 2020. The Alfred Russel Wallace Correspondence Project's transcription protocol. Version 23. *ResearchGate.* <DOI: 10.13140/RG.2.2.21784.08961/1>

Very many thanks to all the WCP staff and volunteers who helped to develop this protocol.

Please send any comments/suggestions to George at g.beccaloni@wallaceletters.org