

# Quill Project

PEMBROKE COLLEGE  
UNIVERSITY OF OXFORD

Model and Data-Entry Guide

**2024 Edition**

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# The Quill Project

The Quill Project exists to model formal processes of negotiation that have resulted in the creation of a text. 'Formal' processes are those that involve a set of rules and conventions governing how text should be created, amended, and finally agreed. Over the last 300 years, constitutions, legislation, and international treaties have all been created using some variation of Parliamentary procedure. Although the details of the rules used by each group vary by time and place, some general principles are common to all such processes.

- It should be clear at any given moment exactly what is under discussion.
- It should be clear when the appropriate moment exists to make suggestions on a particular point.
- There should be at least two opportunities to debate any substantive point.
- It should be clear when a decision has been made.
- It should be clear at any stage what text has been agreed and what text has not.

The records kept as part of this process are intended to facilitate this process, and the Quill platform exists to help make those records more intelligible to later readers by recreating the context within which particular proposals have been made and decisions taken and by providing tools to understand the overall character and progress of negotiations.

The Quill Project models these negotiations by paying attention to four particular types of action: changing membership of committees, proposals to introduce or change documents under discussion, proposals relating to the management of the process of negotiation, and decisions taken upon those proposals.

The Quill project also emphasizes scholarly commentary and making available other resources necessary to interpret the context and nature of proposals and decisions.

At time of writing, the Quill Project website does not allow new projects to be begun without the agreement of the project's director, Dr Nicholas Cole. This is because of the project's limited capacity to provide technical support to work with different projects and our desire to publish only the highest quality digital editions. However, we welcome proposals for new projects.

# About This Guide

This guide to data entry for the Quill platform is based on the experiences of the Quill team in entering the records of the United States Constitutional Convention of 1787, the U.S. Bill of Rights of 1789, various U.S. State Constitutions, the Northern Ireland Peace Talks, and the Constitutions of India and Australia into the platform. In most of these cases, a secretary kept records of the texts that were proposed and amended, debates upon them, and points of procedure, allowing us to construct a detailed timeline of textual change and procedural depth from one sitting to the next.

The records of document negotiations are not always so complete. It is not uncommon in committees, for example, to have no surviving records aside from the documents that entered and exited the committee. This guide will attempt to provide suitable approaches for both types of record.

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## Quill as a Model

The platform *models* negotiations. This model has been designed to mirror as closely as possible the behaviour of legislative bodies and quasi-legislative assemblies. However, like all models, it involves a certain amount of simplification. The model has been designed to be as generic as possible, and the designers have resisted the temptation to create special cases. Rather, they have preferred a data-model and interface that encourages consistency by resisting the temptation to offer too many different ways to capture proceedings. This is important, since it not only encourages consistency within projects, but helps to ensure that models of different negotiations will be comparable.

In particular, the model emphasizes those actions and events that alter the state of texts, and clearly separates out proposals to amend text from decisions to adopt that text. The platform models the logical structure of a negotiation, and some confusion can arise in the minds of new users of the platform. For this reason, it may sometimes be the case that what appears to be a single ‘event’ in a set of minutes in fact needs to be represented as more than one event object within our model.<sup>1</sup> For example, on 17th August 1787, there is a note in the Constitutional Convention records that:

Mr. Ellsworth was willing to vary his motion so as to read, “or without it when the legislature cannot meet.”<sup>2</sup>

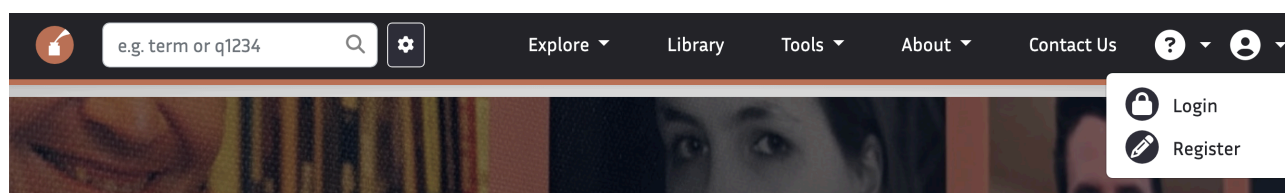
This does not seem to have been contentious and is represented in the platform as an amendment of his original motion. Although no vote is recorded, the editors added a vote adopting this amendment. This correctly models the situation: an amendment was proposed and agreed to. In theory, it might have been objected to. The mindset that needs to be adopted by those doing data entry on a Quill project, therefore, is that the timeline of ‘events’ recorded is a record of the logical sequence of decision-making, not a minute-

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<sup>1</sup> Typically, this is the case for minor and uncontroversial amendments to a document. The Quill Platform is capable of capturing amendment events that are instantly adopted as single events, but this facility is deliberately disabled in all current projects.

<sup>2</sup> See quick-jump e2754 at [www.quillproject.net](http://www.quillproject.net)

by-minute account of proceedings or a simple transcription of the records. A single 'debate' event might occupy much of the time of a session, while a series of decisions taken to adopt or reject particular language might pass in moments.



## User Accounts in the Quill Platform

In order to enter data into Quill, you'll need to sign up for an account. In the top right corner of [quillproject.net](https://quillproject.net) is a person silhouette icon. Clicking on this icon gives you the option of registering for or logging into an account.

Within the platform, users can be assigned different roles that provide them with different permissions. On a practical level, senior editors can assign team members the ability to view and edit certain projects under production, and the specific permissions granted dictate the sorts of actions a team member can take to those projects.

The user roles are as follows:

### *User*

A user can view the material within a project, even if it is hidden from public view, but they cannot edit it.

### *Contributor*

Contributors can input most types of data related to the Negotiation and its timeline but may be restricted from potentially destructive operations that could result in inconsistent data being stored.

### *Editor*

An editor has access to the full range of data-entry tools.

### *Senior Editor*

A senior editor can set the public visibility of the negotiation and use potentially destructive tools to fix errors in the timeline.

An analogous set of user-roles exists for Commentary and Resource Collections.

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## Project Team Structure

The Quill Project has partnerships with universities, archives, and other organisations all over the world. These partnerships allow Quill to apply its methodology to negotiated texts from many different places and contexts, which provides platform users with an opportunity to compare constitutional texts and negotiation processes. This comparison relies on consistency across projects. It is therefore necessary that all Quill models be managed by an editor in Oxford.

### Editor

In academic research projects, and academia at large, an editor is the person who **sets the direction of a project and enforces common standards** across a portfolio of projects. This means that an editor for the Quill Project must have a **robust understanding of the Quill Project's research objectives and methodology, a familiarity with best practice in archive management, research, and digitization projects, and an in-depth engagement with the subject matter and surrounding scholarship**. As such, the Editor of a project manages the wider project team and is the first point of contact for queries from the academic community, press, or public about that project. Given the importance of this role and the fact that the project will be published under the name of Oxford University, project Editors are employees in Oxford.

It is useful to note that the role of editor in an academic project is distinct from the role of 'copy editor' or proofreader. While an editor may give feedback on such things as grammar, spelling, and style, this is not the full scope of their role.

## Roles at Partner Institutions

### Team Leaders

Where a partner institution is collaborating with the Quill Team in Oxford, that institution may have an internal hierarchy among its team members. It is for that institution to determine its internal structure and the defining of roles within their own team. However, to ensure that every Quill project is being conducted with the same rigour, attention to detail, and common standards, those individuals in team leadership positions at partner institutions must **report to their project's Editor at Oxford**. There will often be an Academic Director or Project Co-Ordinator to oversee the collaboration at the partner institution.

A partner team leader will **liaise with the Editor at Oxford** on a regular basis to become familiar with the research and style standards for a project and receive feedback on the work done to date. They will then **communicate the Editor's feedback** to the wider team and **facilitate the implementation of that feedback**.

### Student Research Assistants

At both Quill's partner institutions and internal projects, students are often employed to contribute to the building of Quill models. These research assistants are responsible for tasks, such as **data entry**,

**transcription, proofreading, and cataloguing resources.** All of these tasks are vital to a robust and academically rigorous project. Therefore, sufficient time and attention should be given to them. Depending on the team structure, these research assistants may report directly to the Editor, or their first point of contact may be a local team leader.

## Before You Begin: Records and Resources

There is some preliminary work that needs to be done before you can begin modelling a negotiation. This work will facilitate collaboration on the project and contribute to the integrity of the edition and includes gathering and cataloguing source materials and uploading them into Quill.

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### Locating Resources

Before getting started, you will need to ensure that the records for the project are such that they capture (or would allow you to recreate) the initial texts of a negotiation, the proposals made, and votes taken. In practical terms, meeting minutes or the official journal of a negotiation is typically the minimum source material required for a Quill model. Ideally, you would also gather other sources, such as order papers, amendment papers, and drafts of resolutions, legislation, or propositions.

These archival documents will form the primary basis of the model. Supplementary sources may include things like private journals, correspondence, and newspaper accounts of the proceedings. This list is not exhaustive and will vary by project.

It is important to be as thorough as possible at this stage. It can be tempting to jump straight into modelling, but a robust approach to the gathering sources stage of the project will result in a more robust model. Ensuring you have gathered the core source material before you begin modelling reduces the time required for modelling and therefore for the overall project by minimising the need for complex changes to the structure of the model later.

To locate these sources, it may be helpful to begin with Google (or another search engine) to get a brief overview of what is out there, where records are located, what is easily accessible or already digitized, and who you need to contact for access or permissions. If available, you should also take some time to read a selection of scholarly texts about the negotiation process you plan to model. Footnotes and bibliographies in journal articles and other publications can be helpful in identifying sources, while engaging with the academic literature will aid your overall understanding of the process and highlight any areas of particular contention.

Once you have an idea of where documents are located, you can make more targeted searches in library or archive catalogues, special collections, or historical societies, for example. It is also worth asking these institutions whether they know of any records at other institutions that could be useful.

See Appendix IV for a checklist for visiting an archive to digitize your own material.

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## Note on Copyright and Data Protection

Assessing the copyright status of various sources at the beginning stage of your project is critical in order to avoid a situation where you discover in the end stages of the project that the source that forms the basis of your model is under copyright and cannot be reproduced. Once you have located the material you intend to use to model your negotiation, it is important that you have the necessary permissions to (a) reproduce the text of these records and (b) display images of them to your intended audience. It is important to recognize that these are two separate questions: the image of the document is subject to a different set of copyright laws than the document itself. These questions also have different implications for your project. Until you have permission to reproduce the text of the records, you will not be able to publish your model at all. This means that you should never begin modelling until you have secured the necessary permissions or verified that the document is in the public domain. We encourage you to do all you can to secure rights to display images of the source material, since this will help researchers easily cite the material and increase their confidence in the quality of the edition. However, where this is not possible, you will be able to create resource collections which link to digitized copies of the source material on other websites, or simply to accurately cite the material and direct users to where they can access it for themselves.

To assess a source's copyright status, you will have to refer to copyright law in both the country where the work was originally produced and the country within which you are working. For example, if a government document was published in India, and you are working in the UK, you will need to refer to the copyright laws of both countries when deciding whether or not you may publish that document.

Resources found in libraries, archives or special collections should have copyright information in the catalogue entry, but if the copyright status is not clear, reach out to the relevant institution and ask. It is also important to note that archives and libraries may not have copyright permissions for the material they hold, but they do generally have the right to refuse or grant you permission to reproduce images of the document. In a situation where a copyright holder grants you special permission to publish the material, or an institution grants you permission to reproduce it, ensure that you get that permission in writing. You will then need to enter this in Quill to be displayed alongside the document.

You may also need to consider data protection, depending on the historical period from which your documents date. As a rule of thumb, if any of the material in your collections has been produced in the last 100 years, you should consider whether data protection restrictions may be necessary for some of the documents.

If you are considering data protection, there are three key questions you should ask. These are:

1. Is the person alive or dead, assuming a lifespan of 100 years if you are unsure? (Nb This often overlaps with copyright provisions)
2. Is the information already in the public domain?
3. Is it likely that the release of the information could cause distress to the individual or their family?

Further information about data protection as it relates to archiving under UK law can be found [here](#).

In practice, data protection for Quill's purposes is most likely to include the redaction of personal addresses and telephone numbers, as well as the withholding of documents written in a personal capacity. If you are dealing with more sensitive material and are in doubt, you should consult a lawyer.

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## zzOrganizing Digital Resources

Once you have located a comprehensive set of resources, you will need to create a digital repository of these documents. In most cases, your project will not be responsible for the maintenance or preservation any of the original archival material. However, if an archive *has* been donated to your project, contact the Quill team for guidance on managing archives according to internationally-recognized standards.

For resources that have already been digitized, download high-resolution images of the source. For the hard-copy sources, ask the institution that houses the sources whether there are any high-resolution scans or microfilm scans you can have access to or whether you can visit the collection and take photographs of the files.

Once you have the images, merge and convert them into a single PDF as necessary to mimic the structure of the source material itself. For example, if you're downloading images of a ten-page report document, the image for each page should be converted to a PDF and merged into one. If you have a 100-page bound volume in your collection, all 100 pages should appear in the same PDF. If you have taken the images yourself in an archive, we recommend scanning whole files together wherever possible to ensure it is easy to remember the order documents appeared in within the file or box. In this case, you will need to split pdfs rather than merge them, but the same principle applies. You may also need to crop images that you have taken yourself to present the information clearly and tidily. This should be done before you upload the documents to Quill.

As you compile your resource collections and generate metadata, it is important to hold in mind the core archival principles of *respect des fonds*, provenance, and original order. This will mean:

- records from different archival collections should not be mixed—if you have gathered sources from three separate archives, these should be stored in three separate resource collections;
- the end-user should know exactly where a document has come from—we want to provide information about the provenance of the material so that the end-user can make their own judgement about the reliability of the source;
- hierarchy within the original archive should be maintained—if the item is part of a catalogued archival collection, we should, where possible, preserve the hierarchy of that collection in our presentation of the material so that researchers can see the source material in context and would be able to call it up for themselves if they were to visit the archive;
- supplementary and contextual information about the document should be recorded, where available.

When working with documents that are stored in boxes or folders in an archive, you should arrange your file structure so that your digital repository mimics the hierarchy of the archive. Save images in folders that

correspond to those in the archive catalogue. When naming the folder, title it accordingly. For example, the 'Writing Peace' projects use a range of material from The National Archives of the UK (TNA). The digital repository of these files includes two top-level folders: CJ (Records created or inherited by the Northern Ireland Office) and PREM (Records of the Prime Minister's Office). Within that, you would click through a folder titled 'Office Papers', a folder titled 'PREM 19' and a folder titled 'PREM 19\_4264'<sup>3</sup> to find a particular document from that file.

Within these folders, files should be named in the format 'Name of Box Folder\_Item Number': in this case, 'PREM 19\_4264\_01' and so on. This is important because it means that the document always carries its position within the archive with it, which makes it much harder to lose that information. If someone new were to join your project tomorrow, who had never been to the archive your papers were taken from, they should be able to accurately cite the documents, relying solely on your digital repository. Filenames should not include punctuation other than underscores and spaces, except for the file extension, which should be in the format .pdf.

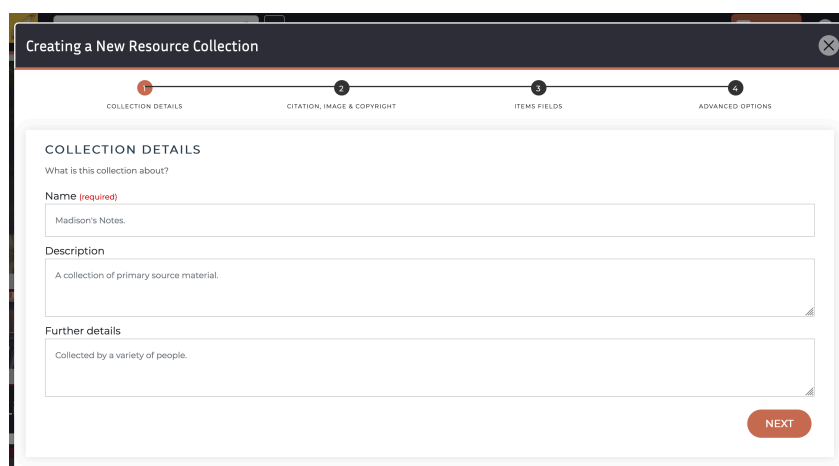
Once you have created a digital repository for your collections and obtained any necessary permissions to publish the images, you are ready to start creating a resource collection in Quill.

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## Creating a Resource Collection

You should only create a resource collection if authorized and/or instructed to do so by your managing editor.

First, navigate to the library page, then click on the editor menu and select 'Create resource collection'. The following form will appear, with four sections:



Creating a New Resource Collection

1 COLLECTION DETAILS 2 CITATION, IMAGE & COPYRIGHT 3 ITEMS FIELDS 4 ADVANCED OPTIONS

COLLECTION DETAILS

What is this collection about?

Name (required)  
Madison's Notes.

Description  
A collection of primary source material.

Further details  
Collected by a variety of people.

NEXT

<sup>3</sup> The name of this file in The National Archives is PREM 19/4264, and this is how the file is titled in Quill. However, many computer systems will not save forward slashes, so we tend to replace them in the digital repository with underscores or spaces.



## Collection Details

### 1. Name

Enter a name for your collection. This might be the name of the archive the documents are held in, the title of a book you are uploading, or the name of the person whose papers you are digitizing followed by 'collection', as appropriate.

### 2. Description

This field should be used to put the papers you have digitized in context. This means briefly explaining where the physical papers were scanned, how they are arranged, and which part of the material you have digitized. Include any other contextual information that you think would help an end user navigate the material and understand why you have set up your collection in this way. Write in full sentences.

### 3. Further Details

In this box, acknowledge the editors and/or archivists who contributed to the collection, whether by sourcing or digitizing the material, recording metadata for it, or by uploading items.

## Citation, Image & Copyright

### 1. Collection Citation

Enter a full and accurate citation for the material in question. We use Chicago as our standard referencing style.

### 2. Image

Upload an image which can be used for the collection. You may have to play around with cropping to get it to display nicely on screens of different sizes.

### 3. Copyright Template

This message will display on the 'copyright' tab for all of the items in your collection. You should therefore enter a general message here which might cover permissions you have received to publish the material as a whole, and/or particular copyright provisions that will apply to all or most of the items in the collection. If the permissions cover most of the items rather than all of them, make sure to specify that.

One example of a copyright template:

Permission to display digital copies of these items has been granted to the Quill Project by University College Dublin. The majority of the items in this collection fall under Irish Government Copyright. The Irish Government is committed to the European Communities (Re-Use of Public Sector Information) Regulations.

When uploading individual items to the collection, editors will be able to see this message and have the option to edit it in order to upload a supplementary message for particular items. If you have a team of people working on the collection, you may wish to provide some templates to help ensure these messages are standardized.

## Item Fields

## **1. Visibility**

This part of the form gives you the option to toggle five specific metadata fields off and/or on for your collection. By default, length (scanned pages) and data protection will be turned on. Length in scanned pages will be used for most projects. The importance of data protection (where applicable) means that turning it off should be a conscious editorial decision, even though for a lot of our projects it is not applicable. Length (physical sheets), physical form and originality will be turned off by default. These are not relevant for most projects—if you think they may be relevant to yours, please ask your managing editor or the Quill Project's editorial team.

## **2. Item Fields**

You use this section to select or enter a range of options for people to select from when uploading individual items to the collection. For subtype options (and physical form and originality options if applicable) you should select all of the options that might apply to items in the collection. For author affiliation, you should enter a list of common options. There is no need to try and be exhaustive, but it is worth focusing on those options where there may be confusion, or multiple ways of writing or spelling the same thing.

## **3. Keywords**

Individually enter each keyword from the list agreed by the project academic and editorial leads.

## **Advanced Options**

You are very unlikely to need to fill any of these options in. If you are in doubt, please contact the Quill Project's editorial team.

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## Setting Up Groupings for a Collection

Once your resource collection has been created, you will need to go in and set up groupings for your collection. These should mimic the file structure of your digital repository, which in turn should mimic the hierarchy of the archival collection your material is taken from (see above). You will do this by clicking on the 'Edit collection' option from the editor menu on your resource collection's homepage, and then navigating to the 'Grouping for items' tab. Here you can add groupings and indicate whether they are subgroups or not. You can also click and drag boxes into other boxes to arrange them.

The box/folder is the point from which you should start when coming up with groupings. You can only have one level of hierarchy which is designated as a box/folder. Use box/folder for the lowest level of grouping which exists for all of the items. Subdivisions are a level below box/folder. Again, you can only have one level of subdivisions. They should only be used if some, but not all, of your boxes/folders are split into smaller divisions. They generally apply where a division has been made for material rather than thematic reasons: for example, a large file split into several archive boxes. Category is the designation within Quill for all of the levels above the box/folder: you can create as many of them as apply for your project.

You will also have to decide on the numbering system you wish people to use for item position within your collection. Where items have not been numbered individually within an archive, a straightforward numbering system is usually best. However, where the originating archive has assigned reference numbers to individual documents in their collection, you will probably wish to preserve these. You may need to add a further level

of sorting if, for example, they number all records of the same meeting together. We have often used 32A and 32B in these circumstances.

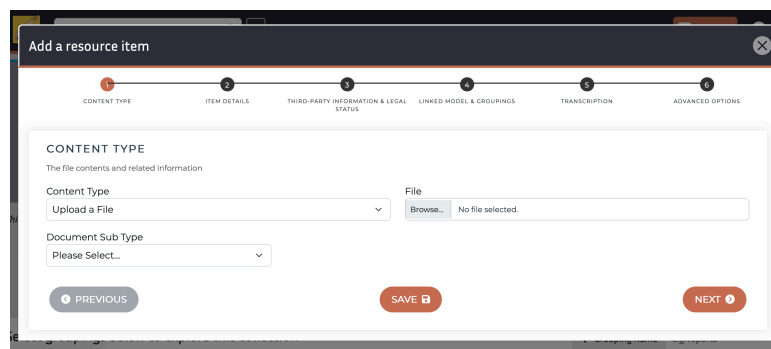
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## Uploading Resource Items and Recording Metadata

There are two main ways that metadata can be recorded on Quill projects: in a spreadsheet, and via the Quill upload form. Your managing editor will tell you whether to use one or both of these methods when creating a particular resource collection. See the section below for points on metadata entry which are specific to using the spreadsheet.

The rest of this section will briefly take you through the Quill upload form. For further information, please consult the training video [here](#).

On the resource collection homepage, the editor menu will give you the option to ‘add an item’. When you click it, this form will appear:



The form is split into six sections, although section six (‘advanced options’) should only be completed by managing editors. You can complete these sections in an order that suits your workflow: clicking the heading will allow you to return to different pages. The only mandatory fields are copyright status, data protection status (where applicable) and title, as indicated below with an asterisk. All other fields are optional, but we encourage you to fill in as many of them as you are able to.

### Content Type

Unless otherwise instructed by your managing editor, please select ‘Upload a File’ and then select the appropriate pdf from your digital repository.

The document subtype dropdown will have been populated by your managing editor. Select the appropriate option from the list. Where more than one choice seems appropriate, consider which information is most useful to the end-user—where would you expect to see this document grouped, if you were a researcher visiting an archive arranged by those categories?

### Item Details

#### 1. Title\*

Make sure to follow the conventions that will have been provided to you by your managing editor in this field. Try and keep these as succinct as possible whilst still conveying enough information about the document to help a user decide whether or not to view it.

## **2. Description**

Make sure to follow the conventions that will have been provided to you by your managing editor in this field. You should give a brief description of the content and physical features of the document. Use full sentences rather than bullet points. It is appropriate to briefly contextualize the item where this is helpful, but do not give your personal assessment of it. You should think of an item description as a catalogue entry<sup>4</sup>: does your description give the end user enough information to allow them to decide whether the document will be pertinent to their research? If your resource collection is a Journal or the Debates, the description you write here will be very similar or even identical to the session description. If your resource collection is a Journal or the Debates, the description you write here may be very similar or even identical to the session description. For examples of appropriate item descriptions, please consult the training video.

## **3. Length (scanned pages)**

Enter the number of pages in the pdf you have uploaded.

## **4. Length (physical pages)**

This option will only appear on the form on for projects where you are cataloguing or otherwise processing physical papers. If relevant to your project, simply enter the number of physical sheets of paper in the document: this may differ from the number of scanned pages if, for example, a document is double-sided.

## **5. Date of document creation (approx)**

Enter the date on which the document was created by selecting options from the dropdown for the day and month, and then entering the year in the format YYYY. If you are unsure of the day or month, select the question marks. If you are unsure of the year, enter question marks in place of the numbers. If the date is a range, enter the **last** date in the range. If you are dealing with an annotated document and you have a date for the annotations, enter the date of the annotations here, and the date of the initial document text below.

## **6. Date of meeting (approx)**

This is a supplementary date field which allows you to enter another date that might be helpful to a researcher browsing the collection, or to an editor modelling the document. For minutes, this will usually be the date of the meeting the document records. However, it can also be used to record the date of an enclosure, or a variety of other useful information: for example, if a document comments on a particular draft of a document, you may wish to enter the date of that draft here, where known. In some instances, the two dates may be the same. Enter the date as above, by selecting options from the dropdown for the day and month, and then entering the year in the format XXXX. If you are unsure of the day or month, select the question marks. If you are unsure of the year, enter question marks in place of the numbers. If the date is a range, enter the **first** date in the range.

## **7. Author**

Use this field fairly broadly, to record the names of individuals associated with the document, whether they are straightforwardly the author, or the annotator of this particular draft, etc. Where

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<sup>4</sup> If you are collaborating with an archive which provides catalogues at item level it may actually be their catalogue entry that you use here, if they have indicated a preference for that.

these individuals exist in the Quill platform, you should enter their names exactly as recorded there. Where they do not, you should follow the conventions provided by your managing editor.

## **8. Author affiliation**

Use this field to record the organisation that the individuals in the previous field were or are affiliated with—this might be a government, a political party, a newspaper, or a corporation of some kind. You may wish to record more than one affiliation for one person: they do not have to be equivalent in order or number to the other field. As with the author field, it is important to avoid referring to a group in more than one way. If the name of an affiliation is also the name of a delegation in the platform, enter it accordingly; if it is not, please consult your managing editor.

## **9. Keywords**

Your managing editor will have populated this dropdown with a list of keywords relevant to the project. Select keywords from this list. If you think there is an additional keyword which might be helpful, raise it with your team lead or managing editor.

## **Third-party information and legal status**

### **1. Copyright status\***

This is a traffic-light system; click the traffic light until it turns the appropriate color. Use 'green' to indicate that you are 100% certain that we have the right to publish the image. Use 'amber' to indicate either that you are unsure whether we have the right to publish the image, or that you don't think we currently have the right but it could be secured. 'Red' should be used in cases where we definitely do not have the right to display the image. Users' abilities to see the images in Quill will be restricted accordingly by their permissions. If you select Amber or Red in the Quill upload form, you will need to explain why you selected that option in the text box below. This is an opportunity to flag any issues with the material for review.

### **2. Data protection status**

As noted above, this option will only appear for specific projects. It works analogously to the copyright status field. Use 'green' to indicate that there are no concerns with a document. Use 'amber' to indicate the presence of personal data which will need to be redacted before the document can be published. Use 'red' to indicate that a document contains sensitive information and should not be made publicly available on the platform.

### **3. Copyright information**

This field will have been populated for the collection as a whole by your managing editor. They may also have provided you with some examples of alternative messages to enter for particular categories of document. Only edit this text if it is not applicable to the document you are uploading. Your edited message will appear alongside the message for the collection as a whole.

### **4. Related link**

This field gives you the option to enter a link—to a copy of the document hosted on another site, or to related contextual material.

## **Linked model & groupings**

### **1. Model type & negotiation/committee**

This menu allows you to attach a document to the negotiation you are modelling, or to a committee within that negotiation. Simply select 'negotiation' or 'committee' from the dropdown on the left, and then select the relevant options from the dropdown(s) on the right. You cannot

currently attach a document to more than one committee. Where you cannot decide which committee is most appropriate, consider attaching the document to the negotiation instead.

## 2. Item position

This field is used to record the position of each document within its box. If there are more than 10 documents in a box, use 01-09 instead of 1-9; if there are more than 100, use 001-099. If individual items are given sequential reference numbers in their archival catalogue, it may be appropriate to use these instead of simply numbering the documents. It may then be appropriate to use letters (eg 88A and 88B) when you need to split up documents that have been grouped and numbered together by the archivist.<sup>5</sup>

## 3. Groupings

These will have been created by your managing editor. Double-click down through the hierarchy until you reach the appropriate grouping for your item and then click on the box in the bottom right-hand corner to attach the document to the correct grouping.

---

## Using a Spreadsheet

Sometimes it may be preferable to use a spreadsheet to record metadata for a whole series or collection of resource items before uploading them to the Quill platform. Your managing editor will provide you with a spreadsheet configured for your project, including data validation options for some fields.

Some general notes on using a spreadsheet to record metadata:

1. It is very important to always make sure that every cell in the spreadsheet is set to 'text'.
2. It is also very important to make sure you are not including any extra spaces at the end of text in cells.

Notes for recording particular metadata:

1. Do not include the file extension (eg .pdf) in the 'filename' field.
2. Dates entered into the spreadsheet must be in the format DD/MM/YYYY. Replace all of these characters (except the forward slash, of course) with question marks as appropriate (eg 23/??/1982; ??/03/1990; 23/07/????).
3. Separate authors, keywords and affiliations in the appropriate fields with semi-colons.
4. To attach an item to a committee or negotiation, first select either 'committee' or 'negotiation', then enter the jump code of the committee or negotiation **without** the initial letter (ie I56, not qI56).
5. Transcriptions cannot be recorded in the spreadsheet; they must be entered in the Quill platform after the documents have been uploaded.

---

## Transcription

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<sup>5</sup> Try not to do this unnecessarily. It is most often appropriate where a series of documents which you would wish to attach to separate sessions in the Quill platform have been grouped together by the archivist.

The following guide is a resource to help get you started thinking about how formatting is generally done on Quill, and the reasons for those decisions. Please note that any alternative instruction from your managing editor supersedes anything in this guide.

---

## OCR

Often, Quill editors will use OCR (optical character recognition) to produce transcriptions of the source material. OCR produces a best-guess at what letter a character is. Although OCR can be useful to transcribe large sections of text, it is also liable to produce errors in the text, either by reading characters incorrectly, or missing parts of the text. Note that OCR tends to generate more errors when used on handwritten notes, serif fonts, columns, and tables.

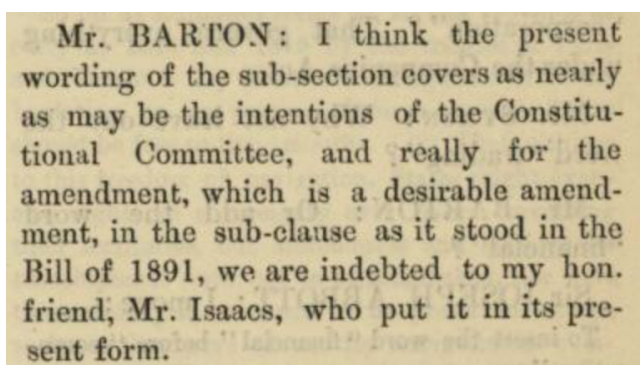
This means that all transcriptions created using OCR need to be checked very carefully against the source material for typos, errors, and formatting.

Common OCR errors:

- The inclusion of hyphens for words across multiple lines of text
- The inclusion of page numbers
- The inclusion of page breaks
- Extra spaces around punctuation
- Inconsistent capitalisation
- Commas transcribed as periods and vice versa
- Words that are scanned as another valid, but incorrect word (e.g. “eights” instead of “rights”)
- Em-dashes transcribed as en-dashes and vice versa

This is not an exhaustive list and the transcriber should also ensure that they check the transcription against the original text, rather than against what they assume is the correct text, as there can always be errors in the original text.

Below is an example of an OCR transcription.



In this example, an OCR software produces this text:

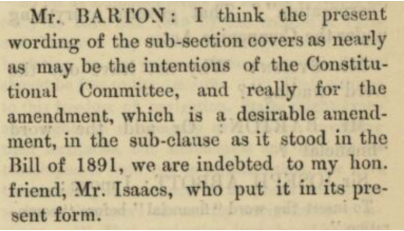
Mr. BAR ION : I think the present wording of the sub-section covers as nearly as may be the intentions of the Constitu-tional Committee, and really for the amendment, which is a desirable amend-ment, in the sub-clause as it stood in the Bill of 1891, we are indebted to my lion. friend, Mr. Isaacs, who put it in its Fe-sent form.

A cleaned version of the text would read:

Mr. BARTON: I think the present wording of the sub-section covers as nearly as may be the intentions of the Constitutional Committee, and really for the amendment, which is a desirable amendment, in the sub-

clause as it stood in the Bill of 1891, we are indebted to my hon. friend, Mr. Isaacs, who put it in its present form.

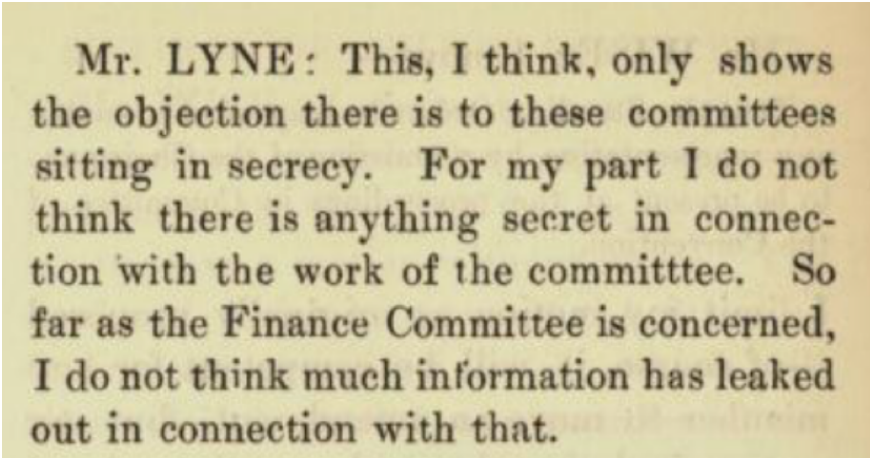


Original Source Material	OCR Transcription	Checked and Corrected Text
	Mr. BAR ION : I think the present wording of the sub-section covers as nearly as may be the intentions of the Constitu-tional Committee, and really for the amendment, which is a desirable amend-ment, in the sub-clause as it stood in the Bill of 1891, we are indebted to my lion. friend, Mr. Isaacs, who put it in its Fe-sent form.	Mr. BARTON: I think the present wording of the sub-section covers as nearly as may be the intentions of the Constitutional Committee, and really for the amendment, which is a desirable amendment, in the sub-clause as it stood in the Bill of 1891, we are indebted to my hon. friend, Mr. Isaacs, who put it in its present form.

In this instance, it would have been faster to type out the transcription yourself than put the text through an OCR reader, but for longer sections of text this may not be the case. It will be up to you to decide in what instances it is better to transcribe manually or use OCR. In either case, the text will always need to be proofread for errors before being entered into Quill.

## Typos in the Source Material

At times, the record itself will include typos. These are not to be ‘corrected’ in our transcription, but transcribed as they appear in the text. In the transcription field and document text field, these errors should not be marked. In the description text field, use [sic] to indicate that the error originates in the source material.

	<p>In this example “committee” is spelt incorrectly, with three t’s. In this instance we transcribe it as it is spelt in the record and use the note “[sic]” to mark that the error originates in the source material.</p> <p>The correct transcription for this speech would be: Mr. LYNE: This, I think, only shows the objection there is to these committees sitting in</p>
<p>secrecy. For my part I do not think there is anything secret in connection with the work of the committee [sic]. So far as the Finance Committee is concerned, I do not think much information has leaked out in connection with that.</p>	

Note: [sic] is never capitalized, and is always placed after the error, with a space before the first square bracket.

Always check if [sic] is necessary. It should not be used in instances where it:

- changes the meaning of the source (e.g. “States Rights” v. “States [sic] Rights”)
- marks US/UK spellings as incorrect where they are consistent with the source material (e.g. in American projects “color [sic]” is incorrect, but for a situation where British English is used “color [sic]” would be correct).
- is an archaic spelling of a word that is not technically incorrect (e.g. “mediaeval” or “employés”)

Quill uses the OED (Oxford English Dictionary) as the arbiter on word usage, so please refer to that resource if you are ever unsure.

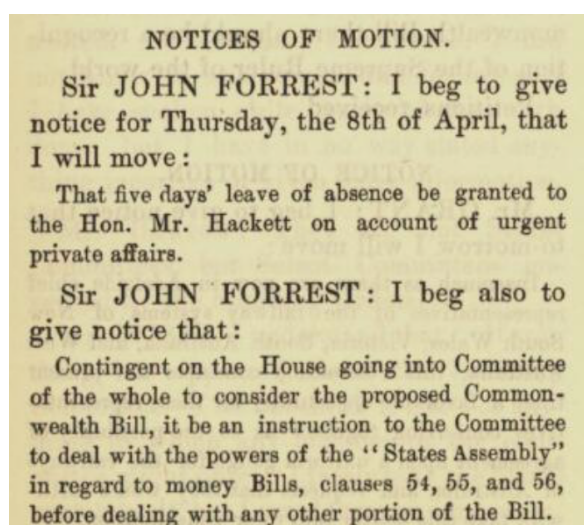
---

## Formatting in the Source Material

The description text is a plain text field. That means that it does not record bolding, underlining, italicizations, or font colour. In these instances there may need to be some editorial discretion in how this formatting is translated to the plain text transcription. The document text is a rich text field and able to capture this formatting—therefore, be careful if copying any document text from the description text in case any formatting has been left behind.

The description text is also unable to capture indentations at the beginning of a paragraph. The Quill standard is to represent this with a full line break between paragraphs when the first line is indented. For example:

The correct transcription for this text would read:



### NOTICES OF MOTION.

Sir JOHN FORREST: I beg to give notice for Thursday, the 8th of April, that I will move:

That five days' leave of absence be granted to the Hon. Mr. Hackett on account of urgent private affairs.

Sir JOHN FORREST: I beg also to give notice that:

Contingent on the House going into Committee of the whole to consider the proposed Commonwealth Bill, it be an instruction to the Committee to deal with the powers of the “States Assembly” in regard to money Bills, clauses 54, 55, and 56, before dealing with any other portion of the Bill.

Sometimes square brackets will appear in the source material. According to the Quill house style, square brackets are used for editorial interventions, and therefore, to avoid confusion, these will be replaced with curly brackets. Please note that this is only for description text (see the table below).

Page numbers and line numbers are not included in the transcription. Page breaks are not recorded as line breaks and need to be removed from any OCR transcriptions. In essence, a run-on paragraph should be transcribed as a single paragraph rather than as two paragraphs.

	Description Text	Document Text	Transcription
[sic]	Use “[sic]” for errors or typos that originate in the source text.	Do not use “[sic]” for errors or typos that originate in the source text.	Do not use “[sic]” for errors or typos that originate in the source text.
Line breaks and indentation	Use line breaks to represent indentation.	Use indentation, rather than line breaks, using the tab key.	Use indentation, rather than line breaks, using the tab key.
Rich-text formatting	Unable to include rich-text formatting, such as bolding, underlining, italics, and text colour. Do follow capitalization as in the source text.	Include all relevant formatting, such as bolding, underlining, italics, and text colour.	Include all possible formatting, such as bolding, underlining, italics, and text colour.
Page and line numbers	Do not include page breaks, page numbers, and line numbers.	Do not include line breaks, page numbers, and line numbers.	Do not include line breaks, page numbers, and line numbers.
[Square brackets]	Change to {curly brackets}.	Keep [square brackets].	Keep [square brackets].

## Some useful terms and definitions:

Curly brackets (also called *braces*): { }

Editing: Checking that the structure and style of the work adheres to editorial guidelines.

En-dash: A shorter dash the length of an ‘n’ character in a given font. When used to separate a clause from the rest of the sentence (UK style), it should have a space before and after. It is also used for date ranges and complex compound adjectives.

Em-dash: A longer dash the length of an ‘m’ character in a given font. Does not have a space before and after.

Full stop: Also known as a period.

Hyphen: A short dash used to join hyphenated words or phrases (e.g. step-by-step).

Hyphens are also used to connect two halves of a word that have been split across a line.

Indent: A space at the start of the first line only of a paragraph. Can also be used to indent whole paragraphs.

Line break: When a new line of text is started.

OCR: Optical Character Recognition. Used to scan pages and produce a rough transcription of a document.

Paragraph break: When a new paragraph is started on a new line. Often has either an indentation or an extra line between it and the surrounding text.

Page break: When a sentence starts on a new page. This is not when a paragraph happens to go across two pages.

Plain text: A text field that only allows basic formatting.

Proofreading: Checking for errors and inconsistencies in the text and that all details are correct.

Rich text: A text field that allows more complex formatting.

Source text: The text you are using as your evidence for how you build the model.

Square brackets: [ ]

Round brackets (also called *parentheses*): ( )

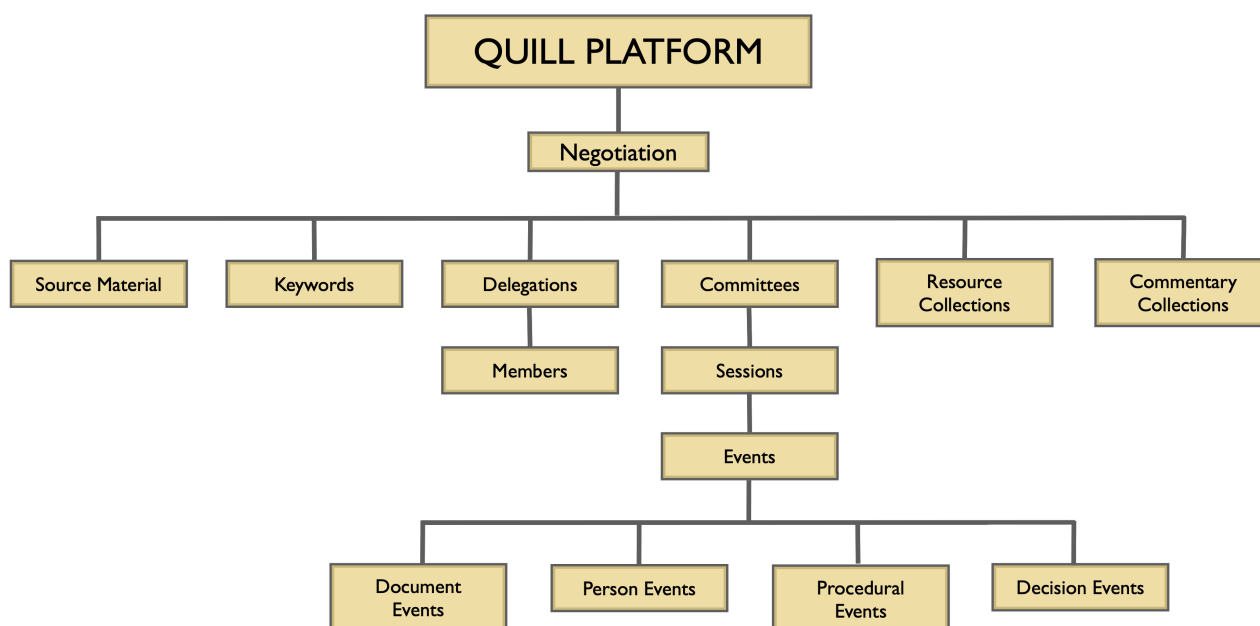
## Editorial and Style Standards

When several people are working on the same project, it becomes difficult to maintain formatting and editorial standards. For this reason, it is helpful and time-saving to keep a running list of style and editorial conventions to be used specific to the project you are working on, to be used throughout. This running document could include, for example, document naming conventions, description formatting rules, etc. If you are not sure whether a comparable document exists for your project, ask your managing editor.

### Top-Level Objects Stored by the Quill Platform



## The Negotiation



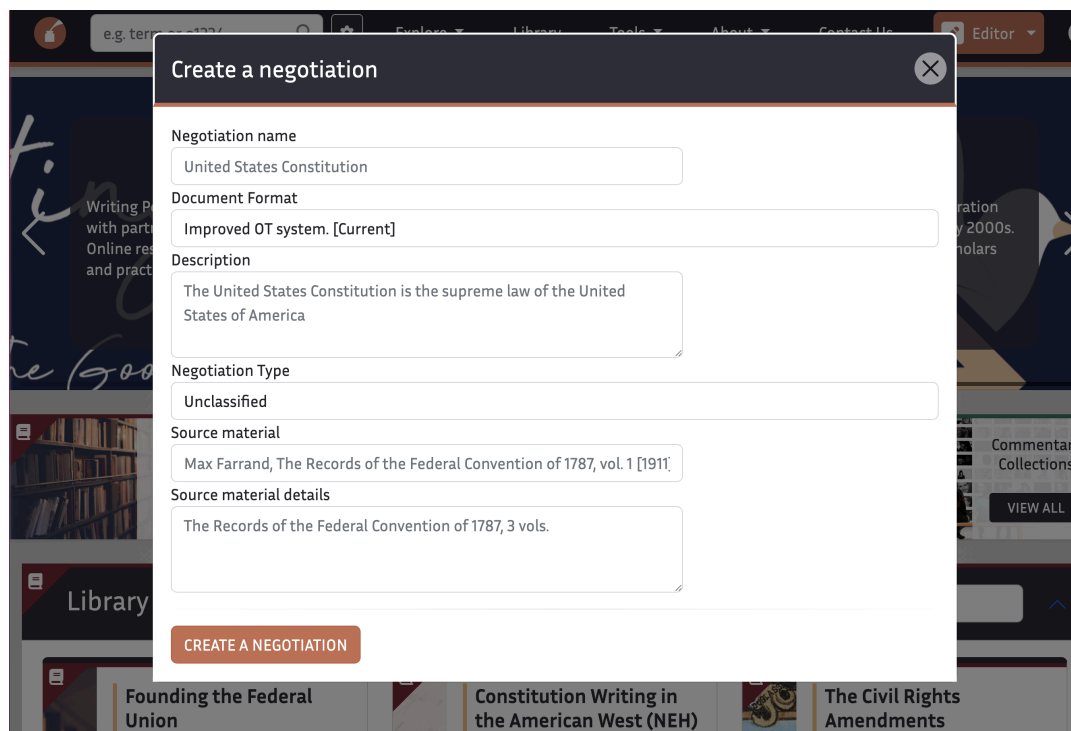
Projects within the Quill Platform are grouped as ‘Negotiations’, reflecting our emphasis on the process by which a final text is agreed. The Negotiation object created for your project will store within it both information that allows the timelines of the negotiation to be viewed and visualized and also other information that is necessary to understand the records being presented.

Editors viewing the  ‘Full Record’ of the Negotiation will be able to add a number of pieces of

information.

## Setting up a Quill Project

On the Quill Library page, click on the 'Editor' menu in the top right corner and select 'Create a negotiation'. The dialogue box that displays will allow users to enter basic information about the negotiation, such as the name, a description of the negotiation, and the project's source material. For the 'Document Format', select either 'Improved OT system [Current]' or 'Improved OT system with rich text (Version 6.0) [Current]' from the dropdown, depending on whether your project will require rich text (italics, bold, line formatting, etc.) in the documents.



The screenshot shows a web browser window with the Quill Library interface. A modal dialog box titled "Create a negotiation" is open. The dialog has a dark header with a close button (X) in the top right corner. The form inside the dialog contains the following fields:

- Negotiation name:** A text input field containing "United States Constitution".
- Document Format:** A dropdown menu showing "Improved OT system. [Current]".
- Description:** A text area containing "The United States Constitution is the supreme law of the United States of America".
- Negotiation Type:** A dropdown menu showing "Unclassified".
- Source material:** A text input field containing "Max Farrand, The Records of the Federal Convention of 1787, vol. 1 [1911]".
- Source material details:** A text area containing "The Records of the Federal Convention of 1787, 3 vols.".

At the bottom of the dialog is an orange button labeled "CREATE A NEGOTIATION". The background of the browser window shows the Quill Library homepage with various book covers and navigation menus.

If your project contains several negotiations, you can group these together in a 'Library Collection.' To create a collection, click the 'Editor' menu and select 'Create library collection.' Give the collection an appropriate name. You'll have the option to fill in description text, which will display underneath the collection's title on the Library page, and this text can be entered at this stage or in the project's pre-publication cleanup stage. The introduction text is a space for you to write a longer introduction to the project that includes historical context, important notes on the editorial process, and insights for users into approaching the material within the collection. Like the description text, this introductory text can be added at this point or in the pre-publication stages.

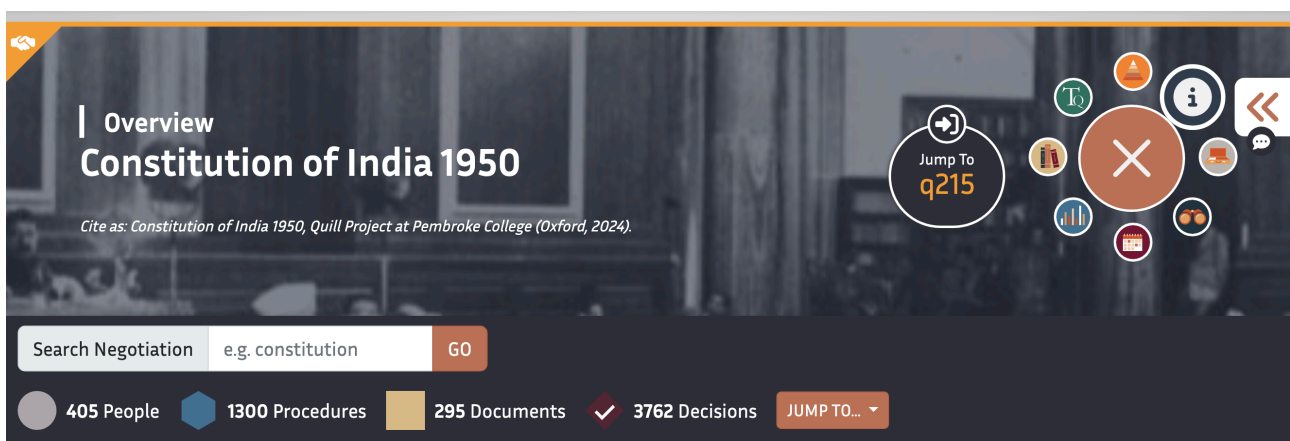
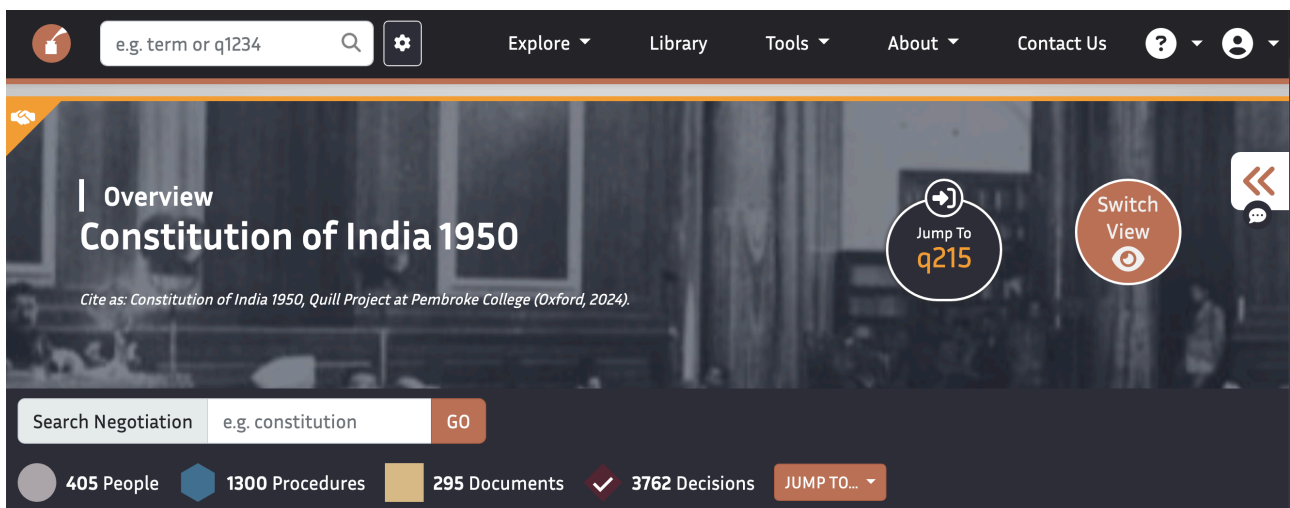


Once you've created the collection, click into it. From the Editor menu in the top right corner, select 'Edit item.' From here, you'll be able to do a number of things, such as add the description and introductory texts, upload a copyright-free image to display alongside the project, as well as add the appropriate negotiations to the collection. To add the negotiations, click in the 'Negotiations' box. A list will drop down, and you can select your negotiations.

You can follow the same procedure to attach **Resource Collections**, which are described later in this guide.

This is also the screen from which you can publish your project.

Once you've created your negotiations and/or collections, click on the title of the negotiation you'd like to begin modelling. You'll be taken to a project home page. From here, you can choose how you'd like to view the information contained within the project. To see the different views, click on orange 'Switch View' button on the project banner.



To begin modelling, select the gray 'Full Record' button. From this page, you'll be able to enter the data that will become the backbone of your model.



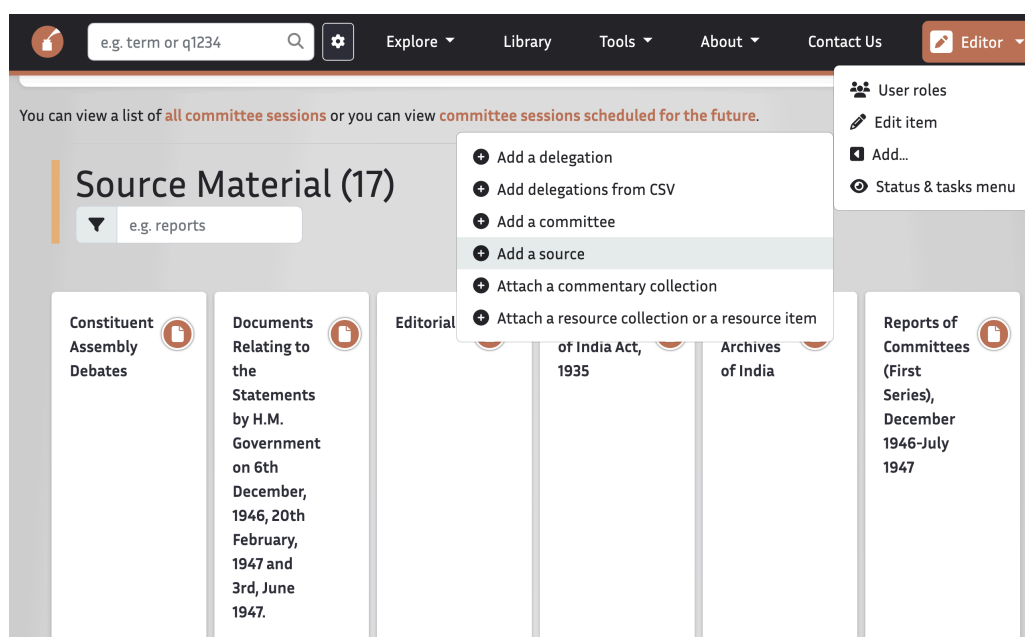


## Source material



One of the first pieces of information on the 'Full Record' view is a list of source materials. Quill allows us to layer source materials in the timelines in order to create the most robust account of the proceedings as possible. It is necessary to have entered source materials before you begin to build timelines. It is also helpful to have a source material entitled 'Editorial', as it will allow you to clarify any editorial decisions you make in the timeline. However, limit these editorial decisions to those which are absolutely necessary for a user to understand the material.

You can add a new source material by clicking the Editor menu > Add... > Add a source. You will be asked to indicate the title of the source and provide its citation details.



Once you've added a source material to the Full Record view, that source material will appear in the Source material dropdown when you create new events. You can add new source materials at any point in your project.

The screenshot shows a form titled "Add an event" with fields for "Event type", "Source material", "Description", and "Person name". The "Event type" dropdown is set to "Person joining". The "Source material" dropdown is open, showing a list of source materials with "Official Journal (Max Farrand, 1911)" selected. The list includes various historical documents and books.

## Delegations

The screenshot shows the "Delegations (51)" section with a filter set to "e.g. non-voting". Below the filter is a grid of 24 delegation cards, each representing a different geographic region or group. Each card displays the name of the delegation, a circular icon with a group of people, and a badge indicating the number of delegates.

Delegation	Delegates
Ajmer-Merwara	1
Alwar	1
Assam	10
Baroda	5
Bengal	29
Bihar	37
Bihar-Delhi	1
Bikaner	1
Bombay	39
Central India States Group	3
Central Provinces and Berar	19
Cochin	1
Coorg	1
Deccan States	2
Delhi	1
East Punjab	13
Eastern Rajputana States	3
Eastern States	7
Gwalior	4
Himachal Pradesh	1
Indore State	1
Jaipur	3
Jodhpur	3
Kolhapur State	2

Once you've entered the source materials, add the relevant delegations. The Delegations section of the platform should mirror the organization of the actual negotiation. For example, the 1787 U.S. Constitutional Convention was organized by state delegations. The Northern Ireland Peace Talks, however, were not organized by geographic constituency but by negotiating 'teams'. In some instances, a political party, such as

the SDLP, comprised a 'team', but in other cases (e.g. the Protestant Clergy, the British Government), these groups were comprised in different ways.

When setting up your project, think about how the real-life negotiation was set up. It is helpful to think about who the delegates were selected to represent at the negotiation. This will give you an indication of the organization of your the negotiation. For example, if a person was elected by the people of Maryland to represent them in Congress, then you have a pretty good indication that that Quill model should be organized into state delegates.

To create a delegate, click the Editor menu > Add > Delegation. You'll be asked to name the delegation and indicate whether the members of that delegation were entitled to vote. In most cases, the delegations will be voting ones. The non-voting delegation option is for people who played a role in a negotiation, but who were not elected to represent a constituency (or party, negotiating 'team', etc.). A common example is the Secretary. The Secretary typically plays an important role in parliamentary style negotiations, but he or she is not granted the right to vote. Adding a non-voting delegation entitled something like 'Offices of the Negotiation' allows you to represent members who played a role at the negotiation and whose actions you would like to capture but who didn't have the capacity to vote. Other examples of such persons would include the Clerk, Chaplain, Doorkeeper, etc.

Once you create your delegations, you can add the delegates. After you enter a delegation, go to the Editor menu and click 'Add a person.' A box will pop up, asking you for information about the delegation you wish to add. 'Pre-nominal title' refers to titles, such as Mr., Dr., Shri, Reverend, Duke, etc. Given names refer to all relevant names except the surname. Note that this does not mean that you have to include a delegate's middle name, for example, if that delegate's middle name is not relevant or referred to in the source materials. Family name refers to the surname. Suffix refers to anything that comes after the surname and that provides more information about the individual. Examples of suffixes include 'Jr.' or 'IV'. A post-nominal title refers to professional or hereditary titles that follow the name. For example, 'PhD', 'M.D.', 'Esquire'.

You will repeat this step for each delegate in each delegation. The members that are added to the delegations are the members that can be represented as 'joining' the timeline later on. Once you've added a delegate to a delegation, you can begin to represent those members as participating in the Quill timeline by showing them as joining a committee, participating in a debate, or proposing text. Delegates cannot be deleted from a delegation if they have been linked to any events. You can add to the delegations and delegates list at any time.



## Committees

### Committees (44)

#### Constituent Assembly

Created on: 1946-12-09

Dissolved on: N/A

Description: None

9 366 142

91 914 52

644

1071 334 6

179 20 56

1060 199

VISUALIZE

FULL DETAILS

FULL DETAILS

#### Committee for Rules of Procedure

Created on: 1946-12-11

Dissolved on: N/A

Description: None

17 2

4 23 2

25 1 2

VISUALIZE

FULL DETAILS

FULL DETAILS

#### Committee of the Whole

Created on: 1946-12-21

Dissolved on: N/A

Description: None

1 160 10

1

114 34 1

10 3

VISUALIZE

FULL DETAILS

FULL DETAILS

#### Credentials Committee

Created on: 1946-12-23

Dissolved on: N/A

Description: None

5

VISUALIZE

FULL DETAILS

FULL DETAILS

#### House Committee

Created on: 1946-12-23

11

VISUALIZE

FULL DETAILS

FULL DETAILS

#### Finance and Staff Committee

Created on: 1946-12-23

9

VISUALIZE

FULL DETAILS

FULL DETAILS

#### Secretary

Created on: 1946-12-08

0

VISUALIZE

FULL DETAILS

FULL DETAILS

#### Negotiating Committee

Created on: 1946-12-21

6

VISUALIZE

FULL DETAILS

FULL DETAILS

The next step is to create committees. Most Negotiations feature a plenary committee (a committee made up of all delegates to the negotiation) and a series of subordinate committees. In some cases, such as U.S. Congress or U.K. Parliament, negotiations take place in a bicameral body, where the action occurs in two main committees (e.g. the House and the Senate, the House of Commons and the House of Lords) and a series of subordinate committees.

Begin each project by creating the plenary committee or committees (in a bicameral negotiation) by clicking the Editor menu > Add > Add a committee. Give the committee a name and provide a Description of it. Then, indicate the date on which it was created. For plenary committees, this could be the date of the first sitting. For subordinate committees, this could be the date the plenary committee votes to create that specific special or standing committee. The 'Date dissolved' field can be left for a later stage, once you reach the point in the record where the committee completes its work.

Committees can be added at any point throughout a project, either up front or as you encounter them in the record



## Sessions

Within each committee is a list of sessions, which record the dates and times when committees met. It is within these sessions that you will enter events and construct the timeline of the negotiation. Sessions can be added at any point throughout a project, though to avoid tangling up or confusing the timeline, it is best to add the sessions in chronological order as you work through the records.

The screenshot displays the 'Sessions (169)' page in the Quill Project interface. The page has a dark header with a search bar, navigation links (Explore, Library, Tools, About, Contact Us), and an Editor button. Below the header, the page title 'Sessions (169)' is followed by a filter bar with a dropdown arrow and the text 'e.g. june'. The main content area shows four sessions for December 1946, each with a date, a session icon, a description, and a timeline of events.

Date	Description	Timeline Events
09 December 1946	The Constituent Assembly elected a Temporary Chairman and Deputy Chairman. Members presented their credentials and signed the Register.	<ul style="list-style-type: none"> <li>1 (Left Arrow)</li> <li>208 (Right Arrow)</li> <li>4 (Person Icon)</li> <li>4 (Document Icon)</li> <li>2 (Document Icon)</li> <li>12 (Checkmark Icon)</li> <li>1 (X Icon)</li> <li>9 (Gear Icon)</li> <li>1 (Speech Bubble Icon)</li> </ul>
10 December 1946	The Constituent Assembly considered resolutions on electing a permanent chairman, provisionally adopting the rules and standing orders of the Central Legislative Assembly, confirming the existing organisation of the office of the Constituent Assembly, and the Committee on Rules and Procedure.	<ul style="list-style-type: none"> <li>4 (Document Icon)</li> <li>14 (Pencil Icon)</li> <li>1 (Document Icon)</li> <li>23 (Speech Bubble Icon)</li> <li>14 (Checkmark Icon)</li> <li>7 (X Icon)</li> <li>4 (Diamond Icon)</li> <li>3 (Diamond Icon)</li> <li>8 (Gear Icon)</li> <li>6 (Speech Bubble Icon)</li> </ul>
11 December 1946	The Constituent Assembly elected a permanent chairman and a Committee for Rules of Procedure.	<ul style="list-style-type: none"> <li>16 (Person Icon)</li> <li>4 (Document Icon)</li> <li>1 (Document Icon)</li> <li>8 (Checkmark Icon)</li> <li>6 (Gear Icon)</li> <li>1 (Speech Bubble Icon)</li> </ul>
12 December 1946	The Constituent Assembly adjourned in order to allow the Committee for Rules of Procedure time to draft the rules.	<ul style="list-style-type: none"> <li>1 (Document Icon)</li> <li>3 (Checkmark Icon)</li> <li>1 (X Icon)</li> <li>2 (Diamond Icon)</li> <li>7 (Gear Icon)</li> <li>4 (Speech Bubble Icon)</li> </ul>

To create a session, click into a committee > Editor menu > Add a session. Enter the date and time of the meeting. The time of a session is a mandatory field, though there are often instances where that information is not recorded. In cases where the committee session aligns with a plenary session, a simple solution is to

set the committee's session time to the same time as the corresponding plenary session. If you have no information to indicate the times of sittings, adopt a standard to use throughout your project, making sure that any sittings that happened on the same day but in different committees don't get tangled up in a way that is not intuitive for users.

In the description box, you can write a brief summary, in full sentences, of what occurred in that sitting. This can be done after the session has been modelled.

# Entering Events

Once you've set up your project, you're ready to start entering 'events'. Quill defines an event as a discrete moment or action in the records. Underlying the Quill methodology is the understanding that everything that occurs within a parliamentary-style negotiation can be categorized into one of four broad 'event' types: person events, document events, decision events, and points of procedure. These broad categories can be further subdivided, and each event type is represented by a specific icon in the timeline.


When doing data entry, your job is to translate the historical record into a sequence of events that both *logically* and accurately represents what happened in a particular 'session', or meeting. It is important to remember when doing this work that Quill has an especial interest in the drafting of text. In other words, a Quill project is less about translating records into icons on a timeline and more about how those icons are able to reconstruct the various amendments and discussions surrounding a particular text.

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## Types of Events

 Events are entered on a timeline within each committee session by clicking on the red plus sign at the place on the timeline where you wish to add it.

The four broad event types are as follows:

 **Document Events** describe actions pertaining to the texts being considered by a committee. Events of this type include:



'Create a document'



'Propose a document amendment'



'Propose a document amendment (also show closed proposals)'. This behaves in the same way as a normal amendment event, but as the name suggests, also


'Debate a proposal'



'Import a proposed amendment'



'Copy a document (e.g. receive from another committee)'

 **Person Events** relate to the individuals who make up a committee. Events of this type include:



'Person joining' (note: in most models this refers to committee *membership* rather than presence)

'Person joining (non-voting-observing)'. This event allows you demonstrate that certain individuals contributed to the negotiation (e.g. the secretary) but were not elected by a constituency and were, therefore, unable to vote.



'Person leaving' (see comment above)






'Person election.' This refers to elections and appointments to offices and committees.










'Attendance record'




 **Procedural Events** pertain to ephemeral motions that do not propose text for consideration. These include:

-  'Procedural motion or agenda item'
-  'Debate a proposal'

◆ **Decision Events** record the decisions made by a committee, such as votes on documents, amendments, and procedural motions. 'Make a Decision' events include

- ◆  'Adopt proposal'
- ◆  'Reject proposal'
- ◆  'Drop proposal' (when a motion is withdrawn or simply superseded by events, without being formally rejected)
- ◆  'Refer proposal' (sending a document from one committee to another)
- ◆  'Postpone debate'
- ◆  'No objection' (indicates that a matter of procedure was consented to without an active decision being made)
- ◆  'Other' (brings agreed or rejected proposals back into consideration)

To decide what events should be added, you'll need to consult the primary source materials, such as the official convention journal or meeting minutes. As you read through these sources, identity the individual events being described and categorize them according to the event types mentioned above. For some negotiations, such as the U.S. Constitutional Convention, this will mean breaking down the entirety of the source text, verbatim, into a sequence of events. However, for other negotiations, such as the U.S. Bill of Rights, where the discussions are intermixed with debates on other topics, editors will have to determine which portions of the notes are relevant to the negotiation and which are not.

On the committee session you wish to model, click the 'Add an  Event' button. A dialog box will be displayed that allows you to select the type of event you wish to add. The different event types that you select from the dropdown list will prompt you to supply the relevant information for each type. However, there are a few fields that are common across all event types.

Add an event

Event type

Person joining

Source material

Constituent Assembly Debates

Source Details

specify pages

Description

Person name

Gokal Lal Aawa

ADD AN EVENT

Once you've selected your event type, select the **Source Material** that describes the event you're adding. For events that propose text, like document events, the source material will be the source from which the proposed text derives. For events that do not propose text, the source material is the source from which the **description** (see below) text derives. In the event that the description text and document text are from different sources, there is an option to add an additional description to an event. This is outlined in the next section.

After you've selected the source material, fill in the **Source Details**. This field allows you to provide a more specific citation. The information you include here can be volume numbers, page numbers, shelf marks, etc. Decide on a project standard for the various source materials in your project.

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## Descriptions

Every event type will require what Quill calls a 'description.' The description box should quote the primary source from which an event is taken. For example, if a committee's minutes open with a list of the members who were present and absent, you will put that list into the description box of the attendance record event.

Descriptions can also contain any crucial explanation by the editors as to the interpretation of that source. If the quote from the source material is ambiguous or requires some contextual information, that can be provided in an editors' note that follows the description text. Similarly, if there is no appropriate text from the sources to be used as a description for a particular event, include an editorial description that gives some context as to what is being represented in the timeline. This will aid readers in keeping track of what is happening in the timeline. Editors' notes are always placed within square brackets and use the following formatting:



[Editors' Note: Per the Programme Order, the Committee considered Clause 1.]

Note: Ideally, we want to use quotations from the source material for description text whenever possible.



## Creating Documents

A document should be created when a single individual or a committee proposes any text, such as resolutions, rules, messages, petitions, or legislation, standing apart from any previous documents. Note that committees do not usually start from a blank sheet of paper, but from some plan, outline, or other draft document, such as a report from another committee. Typically, they then work through this text line by line — the first document acting as an agenda while the second, revised version is written, i.e. as the committee amends, adopts, or rejects the resolutions proposed in the original report. The first document remains unchanged, while the second reflects the debate as it takes place.

For documents that are considered in this way—line by line or section by section—Quill models the text using two document events.

- The first document is the original, including all of the resolutions, clauses, or articles as first proposed.
- The second is a working document – a blank document onto which the individual resolutions, clauses, or articles can be proposed as amendments when they come up for discussion. This allows us to be very specific in isolating what text was under discussion at any given time. This second version is included because parliamentary process dictates that document proposals are debated and voted on in parts, one resolution (or article) at a time. For example, the first major document proposed in the Constitutional Convention of 1787 was the Virginia Plan, which consisted of 15 resolutions. In Quill, when the Virginia Plan is first proposed, the editors created a new document with the text in its entirety. Then, they added a blank document and proposed amendments with the text of each resolution as it came up for discussion in the records. As the editors modelled the Convention's journal, the blank document came to include the amended versions of the original resolutions.

In fact, this reflects the reality of the committee situation. Sitting on the secretary's table (or distributed to all members) would be a plan, outline, or committee report, and the secretary (at least in many pre-word-processor scenarios) would then copy out a new version of the document as each part was agreed to.

As Quill is interested in how negotiated texts evolve, it has a feature that allows us to 'link' documents together so that a text's journey throughout a Convention is continuous. When you create the 'working document' for a 2-document consideration of a text, select the 'Yes' option under 'Add ancestor document(s)'. From the dropdown list, select the original version of the document that's being considered. This will create a relationship in the timeline between those two document events.

Add an event

Event type

Source material

Source Details

Document Subtype

Description

Add ancestor document(s)

Ancestor documents(s)

Add additional ancestor document

Document name






Editors should adopt a consistent naming scheme that clearly labels the documents, though the platform does not enforce one. Users should be able to understand what document they're looking at at any given time. For example, a set of resolutions might be called 'Report of the Committee on Fundamental Rights.' The working version of that document might be called 'Report of the Committee on Fundamental Rights as Amended in the Constituent Assembly'.

Of course, other ways of working are possible. Sometimes a committee might not work through a document line by line, and instead, propose isolated or sweeping amendments to pieces of text without voting to adopt each clause in turn. In this instance, you would propose those amendments directly onto the original and avoid creating a working version altogether. The basic rule to follow is that if a document is considered in such a way that a vote is taken on each section, a second 'working document' will allow for more accurate model of the events. Conversely, a document that is close to a final draft which is only modified in small ways may not require a 'working document'.

## **Document Subtypes**

Not all document events in a timeline will necessarily pertain to the piece of text being negotiated. For instance, a committee may send a message to the Convention, or the Convention may draft a list of rules. These scenarios would be represented in the platform as document events.

From July 2019 the Quill Platform made available a number of document subtypes which can be used to distinguish particular types of document. These are currently:

-  Legislation (used for drafts of constitutions, acts, bills, etc.)
-  Resolutions ('Resolved that...')
-  Petitions (for all communications from outside the convention/negotiating body)
-  Messages (for all internal communications)
-  Rules/Orders of Business (for lists of rules, standing orders, and meeting agendas)

Conjectural (see below)

Position Paper (for documents that state a delegate's, party's, delegation's, etc. position on a particular issue)

Press Release (for documents that are prepared for the press)

It is sometimes difficult to determine whether a proposed motion should be entered into the platform as a document or as a procedural motion. A helpful tip is that if the motion falls into one of these subtypes or proposes text of some kind, it is most likely a document rather than a procedural motion.

### Conjectural Documents

Conjectural documents are used in cases where a committee is not formally creating or amending a document but is nevertheless making decisions which suggest that some form of text was under discussion. Because no formal document exists, the text of the document must be 'conjectured' by the editor. The jigsaw icon is intended to signify that we are 'piecing together' the wording from the record. In thinking about whether you need to use a conjectural document, you may like to consider the following questions:

- Do we have a document in the archival record, or is a document named and referred to in the record (even if we do not currently have access to it)? If so, this is not a conjectural document. Use a different document subtype.
- Are the delegates having a general discussion without attempting to make any decisions or to agree on text or proposals? This is not a document event.
- Although a document has not yet been formally created, is the committee making decisions about specific text which suggest they may have had an informal document or proposal under discussion? Will these provisional decisions impact other documents and proposals later in the negotiation? This is a conjectural document.

Conjectural documents are useful because they allow suggestions that are not proposed formally onto a 'real' document in the record (but are nevertheless upon a similar topic) to be grouped together. In certain projects, conjectural documents will be useful for modelling the early stages of drafting a particular document, when committees have begun to make decisions on what kinds of wording a report or agreement should include, but have not yet reached the stage of formally proposing changes to a document. In other negotiations where a Chairperson holds bilateral meetings with some of the delegations, agreement may be reached on wording with one delegation which will later be incorporated into a formal proposal to a decision-making committee to vote on. Modelling these early suggestions with conjectural documents allows us to better trace the origins of the final text. Often the conjectural document will be added as an ancestor document to the formal document which finally emerges.



## Amending Documents

Negotiated texts are developed by amending draft documents according to parliamentary process. When the sources record a motion to amend a document, the motion should be copied into the 'description' box of the 'amendment' event, and the text of the document below edited to reflect the amendment.

To propose a document amendment, add a new event and select the 'Propose a document amendment' event type. From the 'Document name' dropdown, select the base document being amended. The various proposals to that base document will then display beside 'Proposal to be amended', and you can choose whether you wish to amend the base document itself or a previously proposed amendment to that document. Once the proposal to be amended is selected, that proposal's text as agreed at that point in the timeline will display in the 'New text' box below. In this box, enter the text of the proposed amendment or alter the text as the amendment specifies. Name the proposal, indicate the proposers (if known), and click 'Add an event'.

There are a few ways to represent amendments, and the one you choose should reflect the nature of the debate. Deliberative bodies approach texts in a few different ways:

- I. They consider the whole text of a document at once, proposing amendments directly to that text and voting them
- II. They take up the clauses to the document one at a time, amending and voting on each clause separately
- III. They take up the clauses to the document one at a time, and then consider the sub-clauses to the clauses separately as well

When adding amendments, it is important to read ahead in the sources in order to determine whether the clauses of a resolution are voted on individually.

In Scenario I, you will likely have already created a document in the timeline with the full text of the document being discussed. When events are proposed to this document, you can create a 'Propose a document amendment' event and select the title of the document being amended.

In Scenario II, you will begin with a blank document that contains any headings and clause/section numberings in the document text. Using the two-document procedure described above, each time a section of the original document comes up for discussion, the text of that section will be proposed onto the working document as an amendment. This text can then be amended and voted upon separately from the other sections of the document.

In Scenario III, you will begin in the same way as Scenario II: with a working version of the document that includes any headings or general numbering of the clauses. Say, for example, Clause I comes up for discussion. You would propose an amendment that contains just the numbering of the sub-sections in the document text. If Clause I has three numbered sub-sections, you would propose '1.', '2.', and '3.' in the document text. The text of the various sections of the original resolution text can then be added as a series of amendments to the 'working version' of the resolution. When Clause I, sub-section 1 comes up for discussion, the text of that sub-section would be proposed as an amendment to the working version amendment of Clause I. Think of this as a two-document modelling procedure on a smaller scale.

Committees sometimes change their approach mid-stream. For example, they might begin considering Clause I as a whole before deciding it would be better to consider each of its sub-sections individually. In that case, model the text according to Scenario II. At the point that the committee changes its approach and chooses to vote on the sub-sections individually, add a decision to 'drop' the whole version of the text. For example, if the committee begins by considering Clause I in its entirety, propose the entire text of Clause I as an amendment. At the point when the committee decides to consider Clause I by sub-section instead, drop the Clause I amendment. From here, you will model the Clause according to Scenario III. Propose an amendment with the appropriate section numbering to serve as a working version for Clause I, and propose the individual sub-sections as amendments when they come up for consideration.

One of the more complex amendments to arise in the Constitutional Convention of 1787 was the motion to strike out text which had not yet been adopted into the working document. In other words, committees would take up pieces of text for debate and then move to reject them. Where committees vote to strike out pieces of text which are not yet part of the working document, an amendment event should be added including the text to be struck out. A procedural motion should then be created, including an additional decision to reject this amendment, which can then be agreed to by an affirmative vote. The reason for the use of the procedural motion here is so that the vote in the affirmative or negative in the platform mirrors the language used by the text, which will be less confusing for readers and editors alike.

For those wondering whether alternative ways of modelling this eventuality should be considered: there are alternative strategies available, but none of them are satisfactory. Including an additional amendment to remove the text under consideration results not only in an additional object in the timeline to represent the removal of the text but an additional vote to adopt both the removal of the text and the base amendment. This results in a cluttered timeline. A procedural motion (as opposed to an amendment) fails

to model the logical procedure in question — the committee working from its draft text *did* consider the text that is being removed, and this should be reflected in the platform.

Finally, sometimes committees behave in ways that contradict their rules and propose amendments to a section of text that had already been accepted or reject. For accuracy in the model, these moments can be modelled with the event type 'Propose a document amendment (also show closed proposals)'. This event type will show you all the proposals that have ever been proposed in that committee. Adding an amendment to closed proposal does not bring that closed proposal back into consideration in the timeline however. It merely allows you to propose the change. If the amendment you're proposing is to a piece of the document that had been previously rejected, that previously-rejected piece of text would a 'reconsider' decision in order to incorporate the new amendment, if necessary.

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## ◆ Decision Events

Note: Older versions of this manual referred to 'voting' types, but the Quill model formally tracks decisions, rather than (strictly) votes. In most debates, some decisions are made at speed, and perhaps even without a formal vote at all. The rules of debate, however, will usually make it clear that a decision has been made, even by default, simply by virtue of the fact that the time to object has passed.

Seven types of decision are available to the Quill user: 'adopt', 'no objection', 'reject', 'drop', 'postpone', 'refer', and 'other'.

- ◆ Adopt and ✕ reject are self-explanatory options.
- ◆ Drop decisions should be used (1) when the proposer of an amendment withdraws their proposal, or (2) editorially, when a proposed amendment is clearly neither adopted, rejected, postponed, nor under further consideration. It is most often used by the editors to remove clutter from the platform when a particular proposal is no longer relevant, even if it has not been formally adopted or rejected. For example, entirely contradictory language may have been agreed, or the section to which an amendment pertained may have been removed, or a motion was moved that was never voted on or mentioned again.
- ◆ No Objection decisions function as adopt decisions but are the analogue of 'drop' decisions. They should be used to mark moments when an opportunity to object (perhaps to some decision by the chair to move onto a particular item of business) has passed without objection. They should not be used in place of adopt votes to mark active decisions, even those made implicitly. In spite of the name, they should not be used to mark decisions actively described as 'nem. con.' votes, since those are (in effect) unanimous and active decisions. As a general rule, they should not be used for marking decisions on document events, but rather to capture the non-objection to things like taking up a particular item of business, the saying of prayers, and other items that arise. Typically, the correct voting record type for these decisions will be 'person anonymous' with 0 for all values.
- ◆ Postpone decisions will not change the text or the amendment list: they simply represent a decision to leave a question until later, perhaps deliberately deferring a decision forever while avoiding making an active decision to vote against it. If there is a motion to postpone which is then debated or rejected, or for which you know the proposers, you may wish to represent the motion as a procedural motion with an additional decision to postpone, followed by a vote to agree to that motion. It is for editors to decide on a consistent approach to this choice.
- ◆ Refer decisions allow documents to move between committees. Once a document has been

referred, it can be imported into a different committee, where it can be debated, amended, and voted on. Note that a vote to refer a document will have the same effect in the timeline as agreeing to the document (considering it completed) in the original committee; in original committee, the document will be removed from the list of pending proposals and can no longer be amended or voted on.

-  Other decisions behave in the same way as 'postpone' votes in that they do not change the text or the list of pending amendments. An 'other' vote, however, does reintroduce a proposal into the list of proposals that can be voted on or amended. It is most frequently used together with the 'Reconsider a vote' event type below to bring previously accepted or rejected proposals back in to consideration. Because an 'other' vote brings documents back into consideration in order to be debated or amended, once an amendment has been made, the proposal that the 'other' vote has brought back into consideration will need an editorial decision event to return it to the status of a proposal that has been resolved.

Related to other decisions are 'Reconsider a vote' events. This event type can change the text in a single event by turning an 'adopt' vote into a 'reject' vote or vice versa. It can put rejected or dropped proposals back into the list of pending proposals, or reject text already adopted into a document.

Often, however, in the Constitutional Convention of 1787, committees would 'reconsider' pieces of text in order to debate them further. In this case, the best vote type to use within the 'reconsider' event was the other vote. This would take a piece of adopted, rejected, or dropped text and place it into the list of pending proposals so that debate events could be attached to it.

Once each of the clauses of a resolution or article has been agreed to, a vote should be included to agree to the resolution or article as a whole ("as amended"). To use the example of the Constitutional Convention of 1787, sometimes the record would mention this vote, and sometimes it would not, although it was clear that the entire section had been agreed to.



## Debate Events

Debate events do not affect the text of a document. They simply record the content of discussions and the names of the delegates who spoke in debate.

All debate events must be attached to a proposal, whether a document, an amendment, or a procedural motion — they cannot stand alone. It is therefore important to read the records and consider carefully which proposal a given speaker is debating. In a scenario where a speaker is not discussing any proposal under discussion, it may be useful to represent this as a procedural motion with the 'agenda item/discussion point' subtype.

It is also possible to 'Debate a closed proposal', in other words, a document, amendment, or procedural motion that had already been resolved in the Quill timeline, whether adopted, rejected, dropped, or referred. If you select this event type, select the date on which the proposal was resolved, and it will be listed in the dropdown.



## Procedural Motions

Use procedural motions for events which do not propose text for consideration.

Adjournments are the most common procedural motion. In the Constitutional Convention of 1787, every session ended with a motion to adjourn followed by a vote.

Changes to the order of business can often be represented as procedural motions. In the Constitutional Convention of 1787, delegates often 'gave notice' that they would like to discuss a particular question in the following session. This was a request to the secretary and president to put this question on the agenda for that session — a change to the order of business.

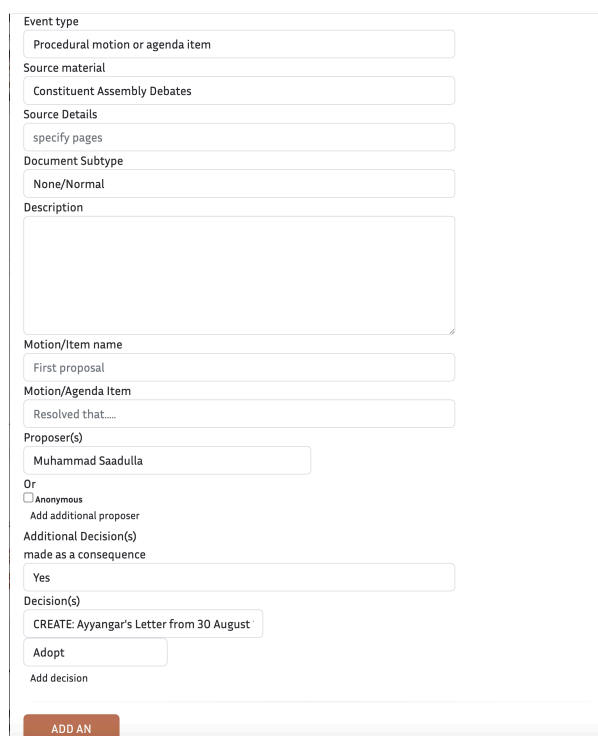
- Some changes to the order of business might be represented as document amendments. Early in the Constitutional Convention, the Rules Committee drafted a document, 'Proposed rules and standing orders for the Convention': when the Convention decided to change one of these rules, such as its hours of operation, Quill represented this as a document amendment and vote.
- Where there is no such relevant document, changes to the orders of business should be represented as procedural motions.

When you add a procedural motion event, you will be asked to provide the 'Motion/Item name', which is the title of the event, and the 'Motion/Agenda Item', which is the text of the motion itself. The purpose of the latter is to capture the wording that prompted particular outcomes. For example, 'I move that the amendment be adopted' or 'I move that the Assembly do now adjourn.' In verbatim record, the text of these motions will likely be recorded in the exact words in which they were spoken. However, it is not uncommon in minuted accounts or summary records for the text of a motion to be recorded only in summary form. In this instance, you must editorially approximate the motion text. Note that these approximations will always be placed in square brackets, and they will contain the object of the motion. For example, '[That the committee adjourn.]' or '[That the committee proceed to a vote on Madison's resolution.]'

### Subdecisions

Sometimes, decisions made on procedural motions will have 'knock-on effects' to other motions or documents under consideration. A common example is a formal motion to adopt an amendment. Adopting a motion to adopt an amendment will have the knock-on effect of also adopting the amendment. We call these knock-on effects 'subdecisions'.

To add a subdecision to a procedural motion, select 'Yes' from the dropdown under 'Additional Decision(s) made as a consequence.' A dropdown list will appear that lists all the motions and document events in that committee. After you select the motion or document event that the procedural motion will affect, you can



The screenshot shows a form for adding a new event. The 'Event type' is set to 'Procedural motion or agenda item'. The 'Source material' is 'Constituent Assembly Debates'. The 'Source Details' section has 'specify pages' entered. The 'Document Subtype' is 'None/Normal'. The 'Description' field is empty. The 'Motion/Item name' is 'First proposal'. The 'Motion/Agenda Item' is 'Resolved that...'. The 'Proposer(s)' is 'Muhammad Saadulla'. The 'Or' section has 'Anonymous' selected. The 'Additional Decision(s) made as a consequence' section has 'Yes' selected. The 'Decision(s)' section has 'CREATE: Ayyangar's Letter from 30 August' selected. The 'Adopt' button is highlighted. The 'Add decision' button is also visible. At the bottom, there is an 'ADD AN EVENT' button.

select the type of decision. Most of the subdecision types are the same as the decision event types. These are:

- Adopt
- Reject
- Drop
- Report/refer
- Postpone debate
- Other

Note that these subdecision types will not 'occur' in the timeline unless the procedural motion is adopted. For example, if you've added a subdecision to a procedural motion to reject a document, that document will not be rejected in the timeline unless the subdecision is adopted.

There are two types of decision that are specific to procedural motion subdecisions.

- Choice: Other or Reject
- Choice: Accept or Reject

These decisions represent motions that have a knock-on effect on a motion or document regardless of whether the procedural motion is accepted or rejected. 'Other or Reject' subdecisions describe scenarios where, if the procedural motion is adopted, the target proposal remains under consideration by a committee, but if the procedural motion is rejected, the target proposal is also rejected. This subdecision type is commonly used in motions for second or third readings of a document. In the scenario where a second reading of a resolution is moved, the passage of the second reading motion means that the committee may continue to discuss the text of the resolution, but a decision to reject the second reading results in the rejection of the text.

An 'Accept or Reject' decision does what it says on the tin. These subdecisions are commonly used for motions to adopt an amendment or clause. An adoption of the motion to adopt Clause I, for example, would result in the adoption of the clause, but a rejection of the motion to adopt implies the rejection of clause in tandem.

#### Agenda Items/Discussion Points

Finally, there are some moments in a negotiation where delegates discuss a topic that does not relate to any text or motion under discussion. Sometimes, these are speeches on external events; sometimes, they are discussions on organization of a negotiation in its first sessions. This list, however, is not exhaustive. Quill notes these moments as a subtype of procedural motion called 'Agenda Items' or 'Discussion Points'. 'Agenda Item/Discussion Point' are added in the same way as a normal procedural motion, but the subtype 'Agenda Item/Discussion Point' can be selected from the 'Document Subtype' dropdown on the 'Add an event' screen for procedural motions.



## Person Events

An important aspect of parliamentary style negotiations is that only certain people have the right to participate in a negotiation. In Quill, we signify that a person has gained the right to participate with a 'Person join' event. Any one who has been added as a delegate within a delegate on the Full Record page can 'join' a committee timeline. Only once a person has 'joined' can they be attached to debates, proposals, and decisions within the timeline. Individuals who have been added to non-voting delegations, such as the secretary, can still join a committee timeline, although that individual is not entitled to vote in the negotiation. By selecting the 'Person joining (non-voting/observing)' event, you may select an individual from a non-voting delegation to join the committee.

In addition to gaining the right to participate, a delegate can lose the right to participate, whether they are not re-elected, they resign, they die, or they are expelled. These moments are represented by 'Person leave' events. Any delegate who has 'joined' a committee timeline can 'leave' it.

Note that join and leave events are not intended to represent presence from day to day, but rather, demonstrate the power of that individual to make decisions.

Some sessions open with a 'roll-call', establishing which persons and which delegations were present.

To add a roll-call event to a particular session, users should follow the usual procedure for adding an event and select 'Attendance record' in the drop-down menu. Within this attendance-record event, users can choose to record the attendance of either individual 'persons' or 'delegations'. They can then mark these persons/delegations as either 'present', 'absent', or 'uncertain'. Further comments can be added when necessary.

Individuals can also be appointed or elected to positions. To indicate that someone has been appointed to a committee or office, select the 'Person election' event type, select the relevant person, and indicate the role they've been appointed to (e.g. Chairman of the Committee of the Whole, President of the Convention, Member of the Rules Committee).

Lastly, when a committee (typically, a special committee) has accomplished the task it was appointed for, the committee can be dissolved by selecting the 'Dissolve Membership' event time.

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## Orientation/Explanatory Events

In 2021, Quill introduced a new event type to make potentially confusing sections of the timelines more user-friendly. These events are 'benign', so to speak, in the sense that do not have any consequences upon the proposals in the timeline, nor do they require resolution.

Section marker or explanatory note:

This event type is used for moments in a session timeline where some contextual information is helpful. For example, if the Convention adjourns for an hour in the middle of a sitting and then resumes its discussion where it left off, you could add a section marker to indicate that an hour elapsed from one event to the next. You can also use section markers to explain gaps in the materials. For example, in the Constitution of India project, there are some instances where we know a committee sat on a particular date, but we have no other records of the sitting. In those instances, we have created a session in the committee with a section marker as the only event, with an editors' note explaining that there are no records for that sitting.

#### Ellipsis (missing section):

In some negotiations, such as the U.S. Bill of Rights, debate on the text is interleaved with the other issues before Congress at the same time. Editors had to read the Congressional records and determine which of the proposals, procedures, and debates pertained to the Bill of Rights and which pertained to other topics. Sometimes these debates were several pages apart in the source material and so did not read as a fluid narrative. The ellipsis marker allows you to indicate moments when you have skipped over a section of the source material that was not relevant to document under discussion. In doing so, you not only present some necessary context to the reader, but also avoid implying that the sequence of events in a session is one continuous sequence.

Note that in models of constitutional conventions, you will likely not need to use these events types, as all the information in the convention journal will be relevant to the drafting of the constitution. This event type is specifically for instances where several pieces of legislation are discussed concurrently.

#### External event:

Sometimes, members of a negotiation will speak about an event that has happened outside the negotiation but that has some bearing on what's being discussed. In the Northern Ireland peace talks, for example, there was a moment where the delegates discussed a bombing that had occurred. In the Constitution of India project, there is a moment where the new Indian flag was vandalized in one of the states, and this act takes up a large portion of the debate in one of the Assembly sessions. These events allow you to add contextual information about the external event.

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## **Editorial Events**

As far as possible, all events added to the Quill timeline should be based on primary source evidence. Nonetheless, it is sometimes necessary to add editorial events — that is to say, decisions that were not explicitly described in the sources, but that must be inferred to make logical sense of the proceedings and to allow the computer to generate its reconstruction of the text.

The most common editorial events in the Constitutional Convention of 1787 were motions to adjourn and their accompanying votes. While it soon became clear that every session of every committee would end with a motion to adjourn or a motion to rise and a vote on that motion, these were not always recorded by the secretary of the Convention. The Quill team therefore entered them editorially to reflect the procedural practice of the time.

Note: It is not necessary to add editorial motions to adjourn or rise in every session. This was done in the U.S. Constitutional Convention negotiation because there was evidence to suggest that it occurred. Where that is not the case, do not assume.

It was also often necessary in the US Constitutional Convention negotiation to add editorial votes. There were several reasons for this:

- The Quill platform can only change text if an amendment has been created and voted on. Due to our hierarchy of amendments, we would often add clauses to a document as amendments to larger subsections, such as articles or resolutions. In order to add these clauses to the document, both the individual clause and the larger subsection would have to be voted on (i.e., two vote events would have to be added). Often, however, the Constitutional Convention would only vote once, and yet expect the text to be adopted into the overall document, not simply the larger subsection. Here, an editorial vote would have to be added.
- Sometimes the records will show informal changes to the text: particularly towards the end of the Constitutional Convention, large and small changes would be made to the text without a vote being recorded. Nonetheless, due to the way the Quill platform operates, a vote must be included in order for the changes to be adopted into the text.

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## Moving Between Committees

It is common in parliamentary negotiations for a convention or Assembly to use committees to draft certain pieces of text or to come up with solutions to highly contentious or highly technical issues. Some conventions use a kind of quasi-bicameral system, whereby an original draft is debated first in the 'Committee of the Whole' (or lower chamber), and an amended version of that draft was debated again by the delegates sitting 'in Convention' (the upper chamber).

In both cases, documents move from one committee to another. Once a committee had finished its work, it would refer a report — which could take the form of a complete draft document or a set of suggestions for amending another document — back into the main Convention. To move a report from one committee to another, a refer vote would be used in the originating committee, followed by a copy document event in the receiving committee.

Refer and copy events should be used in tandem so that a proposal is visualized as being sent out of one committee and into another. These event types should not be used within a single committee to refer documents from one day to the next.

To copy a document, select 'Copy a document (e.g. receive from another committee)' event type. For 'Committee name', select the committee from which the document is referred. For 'Session date' select the date the document is referred. For 'Document name' select the document you wish to copy.

Import amendment events work in a similar way. However, amendments must be imported onto documents that are nearly identical to the documents they were originally proposed onto in order for the text to build correctly.

This works best when a document is referred and copied and its amendments are subsequently referred and imported onto it (as opposed to amendments being imported onto a second, separate document).

Copy events do exactly what the name suggests: they create a copy of an existing document. As you refer and copy documents, you will necessarily create duplicate versions of those documents. It is therefore very important that you keep track of which version of the document is the most recent version and ensure that any debate, amendments, or decisions pertaining to that document are attached to the correct version. Make use of the 'Related events (future)' tab in the event details and the clock icons on copied documents to help you keep track of where documents come from and are referred to.

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## Committee Reports/Shadow Documents

Subcommittees often write their reports as a series of suggestions to the main Convention as to how to amend the principal draft document under consideration. As with the modelling of other documents, you'll have to ascertain how the report document is taken up—as a whole or by individual suggestion.

It is often the case with committee reports that the report document — if it were to be adopted — would have the secondary effect of changing the contents of another document (e.g. the resolution, bill, etc. under consideration). Adding shadow documents to the timeline allows Quill to visualize these secondary effects on dependent documents.

To add a shadow document, click on the event you want to add the shadow document to, and click the link icon on the right hand side of the screen. This will bring up a drop-down menu of previous documents currently available in the timeline. Select the document which is secondarily amended by the current event. This will add an amendment icon to sit on top of the document icon in the 'Visualize' view and the name of the document being amended will appear on the event in the 'Full Details' view, with an edit button next to it.

Selecting this button will bring up the text of the shadow document. Edit the text in accordance with the amendments described in the base document attached to the shadow document. When finished, select the 'Edit' button.

If amendments are made to the document with the shadow document attached, these events will also have a second amendment icon sat above them in the 'Visualize' view. These shadow events can be edited in the same way as changes are made to the amendments.

Sometimes documents are created or amended which — if adopted — would change the contents of multiple documents. For example, if a report proposes amendments relating to two separate pieces of legislation, or if changing a shadow document would change the contents of another document. To add an additional shadow document, follow the same instructions as above.

If a document is referred to another committee, it will not carry the shadow document with it and the shadow document must be added again in its new context. Users may have to create or copy in a new version of the base document that is to be amended.

When the document is adopted, the changes outlined in the shadow document will be accepted and made in the dependent document.

In the scenario outlined above, where the suggestions in a committee report are taken up one at a time, you will take a different modelling approach. This approach begins in the committee. For example, if the committee recommends a series of amendments to the text, the amendments that it agrees will be referred to the Convention alongside the document they amend. That document will be copied into the Convention and the amendments imported onto it. The Convention can then concur or non-concur in the committee's proposed amendments.

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## Incomplete Records

While the records of the Constitutional Convention allowed us to create a detailed reconstruction of the entire process of negotiating the text, there were points at which our only clues to the evolution of the documents were drafts of the documents themselves: there was no record of the process by which the documents were changed, only the several drafts. The Committee of Detail was the most important example of this.

Our principal clues to the different stages in the evolution of the documents were markings on the manuscripts which had in turn been marked by the editor of the printed document collection. The source editions indicated where text had been added and crossed out and marked those changes in different handwritings by using different symbols to mark the text. Using these suggestions, we would model for each document three or more layers of editing. We would start by removing all later changes to the text, for a base version; then, as an amendment, we would input a version of the document with changes made by James Wilson of Pennsylvania; then, as a further amendment, changes by South Carolina delegate John Rutledge. Because the platform calculates the differences between the texts, in the markup visualization, it was then possible to view clearly how the document changed with the addition of each individual editors' notes.

You may not have an edited volume or printed document collection with contextual information about the various drafts or amendments by various hands. It is more often the case that you will encounter subsequent drafts in the archive and must make sense of them yourself. You may not know who proposed the changes from one draft to the text or in what order or on what day. In this scenario, perhaps all you know is that the text changed.


In these scenarios, it may be tempting to add each draft as a separate, new document. This approach, however, would not facilitate our understanding of how the text evolved. As you model the records, however sparse, it is helpful to think about the story that they tell. The story in this instance is not that there were drafts on separate sheets of paper, but that these two (or however many) documents exist


because decisions were made to make changes to the first document. These changes should be modeled as amendments so that the evolution of the document can be easily and intuitively traced by our users. The earliest draft you have, then, would be the text of the new document. The text of the second document would be proposed as an amendment to it, which is adopted. Then, the text of the third document would be proposed as an amendment and adopted, and so on.

There may also be times when you can 'reverse-engineer' what an intermediate draft a document might have looked like by comparing a document you've found in the archive with a committee's sparse record of amendments made. By subtracting the agreed amendments from the version of the text you can arrive at the likely text of the intermediate version.

Bear in mind, however, that in particularly complicated negotiations, it is preferable to avoid making significant assumptions or implying that something is fact when it might not be. Make use of editors' notes to signal to users any editorial inferences in the model.




 **Commentary Collections**
Create a commentary collection




Research Assistants' Commentary (1787 Constitutional Convention)

Issues highlighted by the 2016 editorial team.



Introduction to the Constitutional Convention


Quill 2016 Edition



Advising the President

by Lindsay Chervinsky

Lindsay Chervinsky on the President's Cabinet



The Creation of the Electoral College

by N. P. Cole, Grace Mallon and Kat Howarth

A collection highlighting important moments in the debate over how a President should be chosen for the United States.

The Quill platform supports commentaries by editors. Commentaries are comprised of supplementary information about an event in the timeline – for example, relevant historical information or a piece on the particular difficulties in researching a certain moment in the timeline – that is not immediately relevant to understanding the progression of events in the timeline. In this way, commentaries differ from editorial notes.

Commentaries must be attached to timeline events (amendments, debates, votes, and procedural motions): this is designed to keep a close focus on the records. An individual commentary can be attached to only one event in the timeline.

To create a commentary, you must first create a Commentary Collection. On the Library page, select the Editor menu and 'Create commentary collection'. You can attach this collection to your project on the project's Full Record page by selecting the Editor menu and 'Attach a commentary collection'.

Now that you've created a project commentary collection and attached it to the relevant project, you can begin adding commentaries. To do so, select the event in the timeline you wish to add a commentary to. At the bottom of its description field is an orange button that says 'Add a commentary'. When you click this button, a box will appear, and you will be asked to specify the name of the collection the commentary will be a part of and to name the commentary itself. In the 'Commentary' field, insert the text of the commentary. A helpful tip is to type out the commentary in a word processor that checks for grammar and spelling and then copy and paste the text into Quill.

# Keywords

Particular ideas or problems can be tracked in a given negotiation by attaching keywords to relevant events. Keywords may also be used to track similar themes between negotiations. Keywording strategies are beyond the scope of this document. The Quill

Platform itself gives editors and senior editors the ability to oversee and enforce particular approaches to keywording. These strategies should be discussed during the initiation of a project and reviewed during it. The advice of the Quill project's core team should be sought.

# Progress Tracking

If there are multiple people on your team responsible for data entry, it might helpful to create a 'Progress Tracker.' An important thing to bear in mind is that, in order to accurately capture the way documents move and change throughout a negotiation, events must, in most cases, be entered into the platform chronologically. However, two people entering data at the same point in the timeline at once can cause issues in how document text builds, something that can be painful and time-consuming to correct. For this reason, it is essential that team members are not working on top of each other. To avoid this, you could use a progress tracker (pictured below).

A	B	C	D	E	F	G	H	I	J
			08/12/1946		09/12/1946		10/12/1946		11/12/1946
			19:00	11:00	19:00	11:00	19:00	11:00	19:00
Constituent Assembly									
Rules of Procedure									
Committee of the Whole									
Credentials Committee									
House Committee									
Finance and Staff									
Secretary									
Negotiating									
Cabinet Mission									
Constitutional Advisor									

This is an example of a progress tracker created for the Constitution of India project. In this example, the first column in the spreadsheet contains the list of committees, and the first two rows indicate the sittings. If that committee has a sitting on a particular date and time, it will be given a white cell. When a team member begins to model that session, they will put their initials in the cell to indicate to the team who is working on it. This allows all team members to see what needs to be completed and the further point in the debates that have been modelled. In the scenario that a team member gets stuck and cannot continue entering events in the session they're working on until someone working in a previous session creates a certain document or event, that team member can look at the spreadsheet, see who is working on that session, and ask them to add the event that they need to continue. Then, once the session is modelled and no issues have arisen, the cell is turned green.

# Quill Markdown

At certain places throughout the website Quill will accept Markdown instead of plain text. Note that this is currently available for commentary entries and for blog posts and other text resource objects. It is not available for the documents stored as Document Events in the timeline.

Markdown was originally specified by John Gruber (<http://daringfireball.net/projects/markdown/>). It is a slightly formalized version of the formats used by text-only writers of email.

It has since become a common way to allow users to add styling to websites without needing to write HTML. As with most implementations, the Quill version of Markdown has some differences from the Markdown. Some features (such as footnotes) are needed by Quill but were not needed by John Gruber. Others that he specified have been disabled for security reasons.

Markdown	Rendered as
<b>*text here*</b>	<i>italics</i>
<b>_text here_</b>	<i>italics</i>
<b>**text here**</b>	<b>bold</b>
<b>__text here__</b>	<b>bold</b>
<a href="http://google.com">http://google.com</a>	Links will be made clickable automatically if no alternative text is supplied.
[Link Text](http://google.com)	A clickable link with specified text
[Link Text] .....	An alternative way to specify links is to put just the [text] marker in the paragraph, and specify the meaning of the link on a new line, either at the end of the paragraph or at the end of the document. Note that the [text] should be a unique label.
[Link Text]: <a href="http://google.com">http://google.com</a>	
[^1] ....	Footnotes are specified with a marker in the text that begins with ^. The actual text following can be any unique label, although numbers are intuitive. The label must be unique.
[^1]: footnote text	The footnote text can be specified either on a new line at the end of the paragraph or at the end of the whole document.
> quoted paragraph	> at the start of a paragraph indicates that it is quoted.  Optionally, every line of the paragraph can begin with >  > just like quoted text > used to do do in > old-fasioned email.





## Worked Example

The following worked example is taken from 2016 version of The Records of the 1787 Constitutional Convention, 9th August 1787. It can be found at [quillproject.net](http://quillproject.net), Session s111, starting at event e2424.

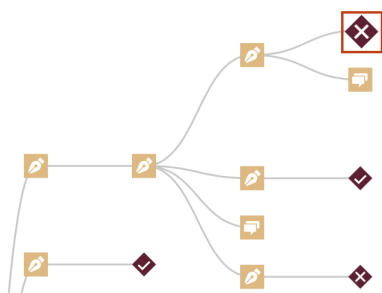
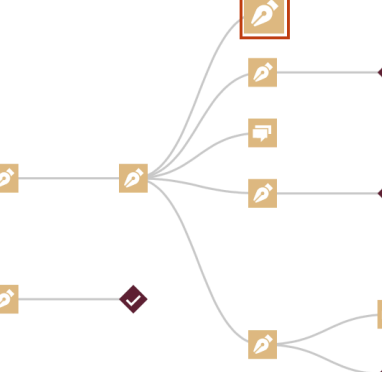
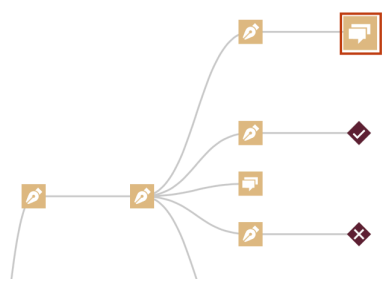
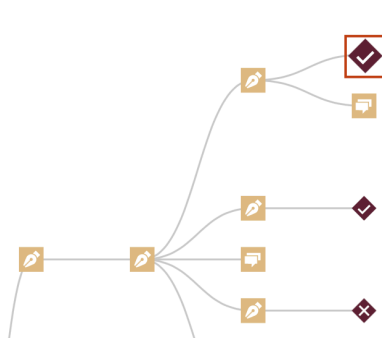
The Convention at this point was working from a report from a subcommittee. This is represented in the platform as 'Report of the Committee of Detail'. As they worked through each section, the agreed text is added to a document called 'Report of the Committee of Detail [resolutions]'.

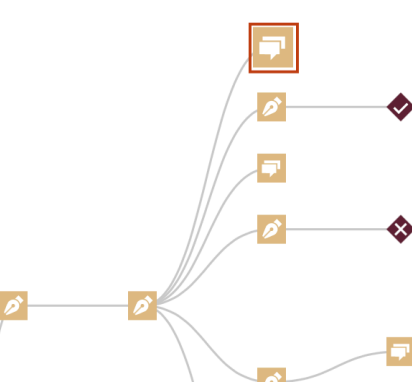
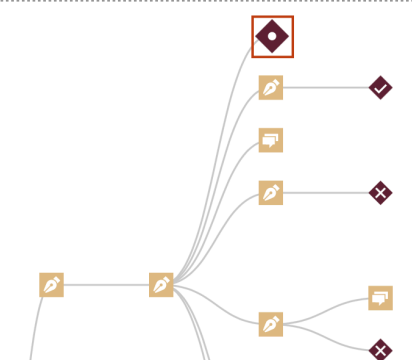
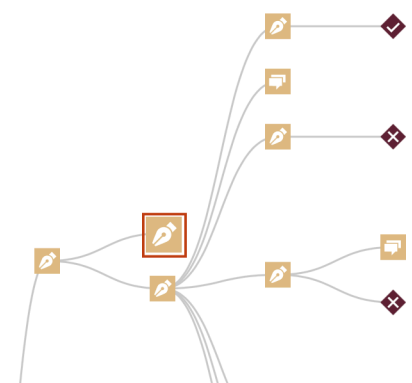
The section here presented a number of difficulties. The material from the Official Journal and Madison's Notes needed to be interleaved, since they did not preserve exactly the same details. Typically, at this point, the text was debated article by article and section by section, but halfway through the debate of the first section, a decision was made to suspend that procedure and divide the section further for the purposes of debate. This was relatively complicated to represent.

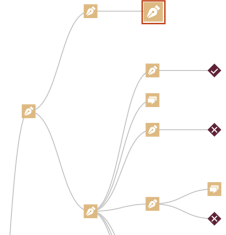
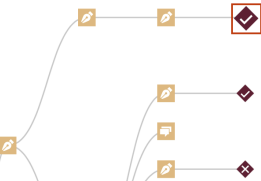
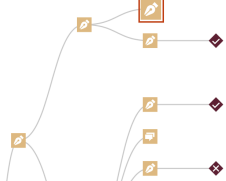
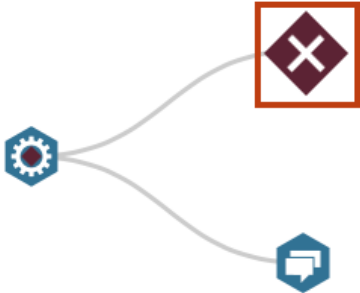
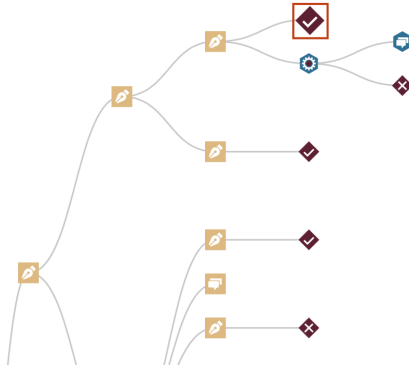
Readers are advised to consult the events on [quillproject.net](http://quillproject.net), taking special note of the 'Document Complexity Tree' and the 'Proposed Text' that the platform presents for each event.

Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
'Art. V. sect. 1. taken up.'	<b>e2422</b> As the Convention would debate each section and then vote to accept or reject it as a whole, the start of the debate on section V is simply an amendment on the base document adding 'V.' to the text.	
'Art. V. sect. 1. taken up.'	<b>e2423</b> A sub-amendment adding in the text that the Convention was discussing: 'Sect. 1. The Senate of the United States shall be chosen by the Legislatures of the several States. Each Legislature shall chuse two members. Vacancies may be supplied by the Executive until the next meeting of the Legislature. Each member shall have one vote.' This text is copied over from the Report of the Committee of Detail document.	
'It was moved and seconded to insert the following words in the third clause of the 5 article after the word "executive" '	<b>e2424</b> This is represented as an amendment on e2423.	
'which passed in the affirmative.'	<b>e2425</b> The committee adopted the amendment proposed in e2424.	

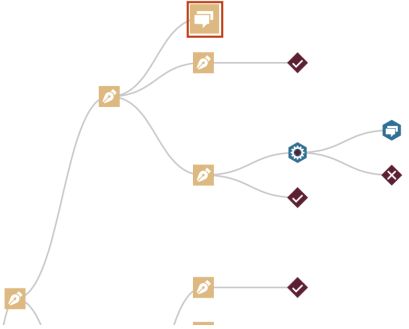
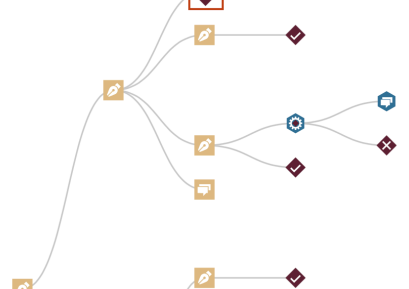
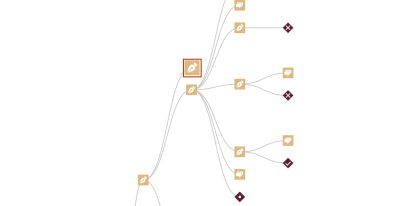
Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
'Mr. Wilson objected to vacancies in the Senate being supplied by the Executives of the States. It was unnecessary as the Legislatures will meet so frequently. It removes the appointment too far from the people; the Executives in most of the States being elected by the Legislatures. As he had always thought the appointment of the Executives by the Legislative department wrong: so it was still more so that the Executive should elect into the Legislative department.' etc.	<b>e2426</b> There was then a period of debate, relating to the section (e2423).	
'It was moved and seconded to strike out the 3rd clause of the 1st section of the 5. article.'	<b>e2427</b> This is a motion to strike out text that is already under discussion – and so is a proposal to amend the text.	
'which passed in the affirmative [sic] [Ayes — 1; noes — 8; divided — 1.]  [Editors' Note: As Farrand remarks in a footnote, the Journal is clearly mistaken here: Madison confirms that the motion was rejected.]	<b>e2428</b> The proposal to strike out the text is rejected.	
'It was moved and seconded to add the following words to the 3rd clause of the 1st section of the 5 article, namely,  "unless other provision shall be made by the Legislature".'	<b>e2429</b> another amendment to the text of the first section (e2423).	
'Mr. Elsworth. He was willing to trust the Legislature, or the Executive of a State, but not to give the former a discretion to refer appointments for the Senate to whom they pleased.'	<b>e2430</b> a debate event to e2429, but not a proposal to change text.	

Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
<p>'It was moved and seconded to add the following words to the 3rd clause of the 1st section of the 5 article, namely,</p> <p>"unless other provision shall be made by the Legislature"</p> <p>which passed in the negative [Ayes — 4; noes — 6.]'</p>	<p><b>e2431</b> here, the event at e2429 is rejected.</p>	
<p>'It was moved and seconded to alter the 3rd. clause in the 1st section of the 5. article so as to read as follows, namely,</p> <p>"vacancies happening by refusals to accept resignations or otherwise may be supplied by the Legislature of the State in the representation of which such vacancies shall happen or by the executive thereof until the next meeting of the Legislature".'</p>	<p><b>e2432</b> another amendment on the first section (e2423).</p>	
<p>Mr. Govr. Morris this is absolutely necessary. otherwise, as members chosen into the Senate are disqualified from being appointed to any office by sect. 9. of this art: it will be in the power of a Legislature by appointing a man a Senator agst. his consent, to deprive the U. S. of his services.'</p>	<p><b>e2433</b> a debate event to e2432.</p>	
<p>'It was moved and seconded to alter the 3rd. clause in the 1st section of the 5. article so as to read as follows, namely,</p> <p>"vacancies happening by refusals to accept resignations or otherwise may be supplied by the Legislature of the State in the representation of which such vacancies shall happen or by the executive thereof until the next meeting of the Legislature"</p> <p>Which passed in the affirmative.'</p>	<p><b>e2434</b> the vote that goes with e2432.</p>	

Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
<p>'Mr. Randolph called for a division of the Section, so as to leave a distinct question on the last words, "each member shall have one vote". He wished this last sentence to be postponed until the reconsideration should have taken place on sect. 5. Art. IV. concerning money bills. If that section should not be reinstated his plan would be to vary the representation in the Senate.</p> <p>Mr. Strong concurred in Mr. Randolphs ideas on this point.'</p>	<p><b>e2435</b> There was then some discussion about whether separate votes should be taken on different parts of this section. The debate is represented as a debate event.</p>	
<p>[Editors' Note: Madison writes, 'Mr. Randolph called for a division of the Section, so as to leave a distinct question on the last words, "each member shall have one vote".']</p>	<p><b>e2436</b> The record indicates that the section was subsequently divided, with votes taken separately on each part. This is represented as the original section-amendment (e2423) being dropped and a new working amendment proposed. To represent this in the platform, the text of the section is dropped and reintroduced as two separate amendments.</p>	
<p>[Editors' Note: Madison writes, 'Mr. Randolph called for a division of the Section, so as to leave a distinct question on the last words, "each member shall have one vote".']</p>	<p><b>e2437</b> Now that e2423 (the original amendment representing all of the first section of Article 5) has been dropped, along with all of its sub-amendments, this amendment introduces just the section number. The two sections of the divided clause will be added as amendments on this event. There was a choice to be made here. The editors could have decided to omit this step and add the amendments directly under the e2422 amendment. The reason for introducing additional complexity is because this is a controversial section with extensive debate, and this step preserves the hierarchy of the discussions, allowing the moment when the whole section is finally agreed to be captured (see e2445 and e2446). Even more importantly, it allows the debate at e2445 to accurately point to the section as a whole. It was this last consideration that confirmed the decision to include the <b>e2437</b> step.</p>	

Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
[Editors' Note: Madison writes, 'Mr. Randolph called for a division of the Section, so as to leave a distinct question on the last words, "each member shall have one vote".']	<b>e2438</b> Now that e2423 (the original amendment representing all of the first section of Article 5) has been dropped, along with all of its sub-amendments, this amendment introduces Article 5's first three clauses.	
'On the motion to agree to the three first clauses of the 1st section of the 5th article  it passed in the affirmative'	<b>e2439</b> The first three clauses and Article 5 are agreed.	
[Editors' Note: The last clause of Article V, section 1 was now under discussion.]	<b>e2440</b> Like e2438, this is an amendment on event 2437.	
'It was moved and seconded to postpone the consideration of the last clause in the first section of the 5. article.'	<b>e2441</b> The second part of the first section of Article 5 was controversial, and a proposal was introduced to 'postpone' discussion. Had this vote passed in the affirmative, it would have been simple to represent it here as a vote to postpone. But it passed in the negative, so it has to be represented here more fully — a procedural motion, with a sub-decision to postpone debate. There followed an extensive debate on matters of procedure, which is represented as <b>e2442</b> . The motion failed, which is represented as <b>e2443</b> .	
'On the question to agree to the last clause in the 1st section of the 5. article  it passed in the affirmative.'	<b>e2444</b> The committee agreed to the clause.	



Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
'Mr. Randolph then gave notice that he should move to reconsider this whole Sect: 1. Art. V. as connected with the 5. Sect. art. IV. as to which he had already given such notice.'	<b>e2445</b> If the decision had not been taken at e2437 to represent the divided section 1 as three separate events — e2437 (containing only the section number), e2438 (the first clauses) and e2440 (the controversial final clause) — it would have been impossible to have this debate event point accurately at the complete text as it had been agreed.	
[Editors' Note: Since the Convention now turned to section 2, it may be assumed that section 1, as amended, was now tacitly agreed.]	<b>e2446</b> At this point, e2437 (with the two sub-amendments now agreed) needed to be marked as approved so that its text would be incorporated into the Article 5 part of the document. Here, then, is an 'editorial' vote marking the point at which section 1 was agreed.	
Art. V. sect. 2d. taken up.'	<b>e2447</b> This amendment adds the text from section 2 of article 5. Cf e2432.	
.....	<b>There follows a series of events relating to sections 2, 3, and 4.</b>	

Text in the Journal or Madison's Notes	Represented in Quill	Further Notes
[Editors' Note: The Convention now moved on to Article VI, implying that those parts of Article V which had been agreed were added to the working document.]	<b>e2476</b> There is no vote approving the whole of Article 5 as amended. However, there is sufficient evidence in the text that such a vote would have taken place, as that seems to have been standard practice. Even if a vote was not formally taken, the revised Article 5 must have been tacitly approved at this point. Either way, the platform requires a decision to accept it in order to take that text into the working document.	

# Representing Less Than Logical Records

In general, the platform should be viewed as a way to *model* a negotiation — not necessarily a literal representation of votes taken. In practice, committees may omit votes on uncontroversial issues that their rules and orders of business technically require. For the most part, these silent, obscured decisions can be represented as decision events. Sometimes, however, committees behave in ways that need careful handling to avoid confusing future users. A case in point is the ‘motion to strike out’ text that has not yet been agreed to the document. It is being ‘struck out’ in the sense that it is not being included in the new draft.

## Example

On the 17th July 1787, the Constitutional Convention was discussing the ninth resolution of the Virginia Plan. It had already agreed the text:


9. Resolved that a national Executive be instituted to consist of a Single Person to be chosen by the National Legislature, with power to carry into effect the national laws; to appoint to offices not otherwise provided for

The next part of the text to come under discussion was the phrase: ‘to be ineligible a second time;’ The official journal states, ‘It was moved and seconded to strike out [these words]’. This motion was carried.

How should this be represented for the reader?

## Correct Approach

The editors of the 1787 Convention adopted the following:

quillproject.net object	Event type	
e1942	Document Amendment proposing the words ‘to be ineligible a second time;’	
e1943	Procedural Motion with a subdecision to reject e1942	
e1945	A vote to accept e1943	

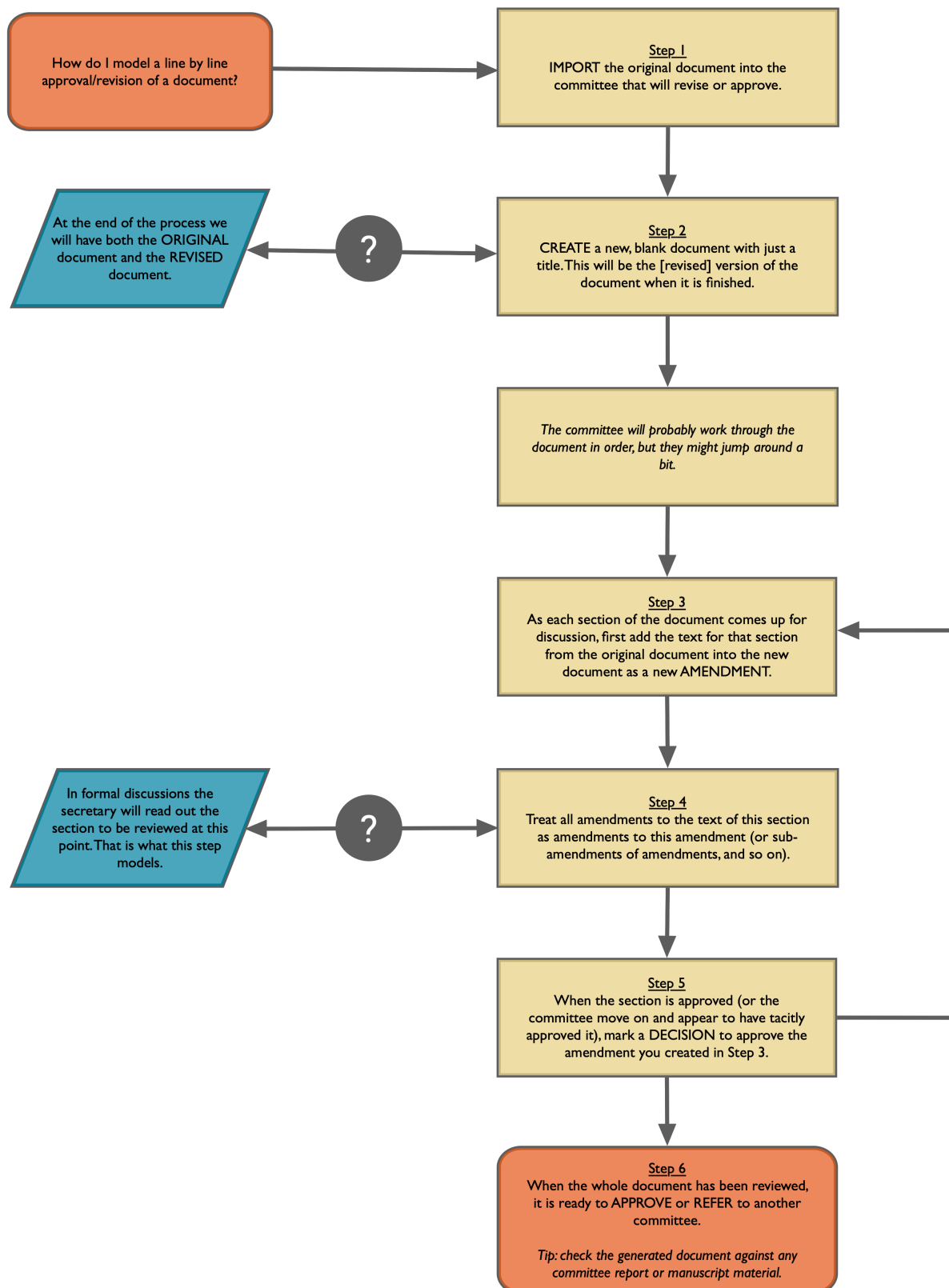
## Rejected Approaches

Logically, the Convention simply rejected e1942. This could have been represented as such (i.e without e1934 and changing the type of e1945 from ‘accept’ to ‘reject’). However, representing this simply as a decision to reject the proposal would in a confusing experience for the user — a decision to reject text is shown, but the journal describes a motion passing in the affirmative. The representation above allows the visualization to more closely match the wording of the minutes at this point. To put it another way: the members of the Convention themselves thought they were voting in the affirmative for a motion *not to include* a particular phrase in the new draft. Representing this as a decision to ‘reject’ the text in question would have resulted in a display that would have looked to the user like a mistake. The use of a Procedural Motion event at e1943 allows the record to be read more naturally.

The motion to strike out might have been represented as a child amendment of e1942, but this would have resulted in a confusing display and probably the insertion of a ‘drop proposal’ decision event to remove the proposals from the lists of items under consideration. This, again, would have been confusing for the user.

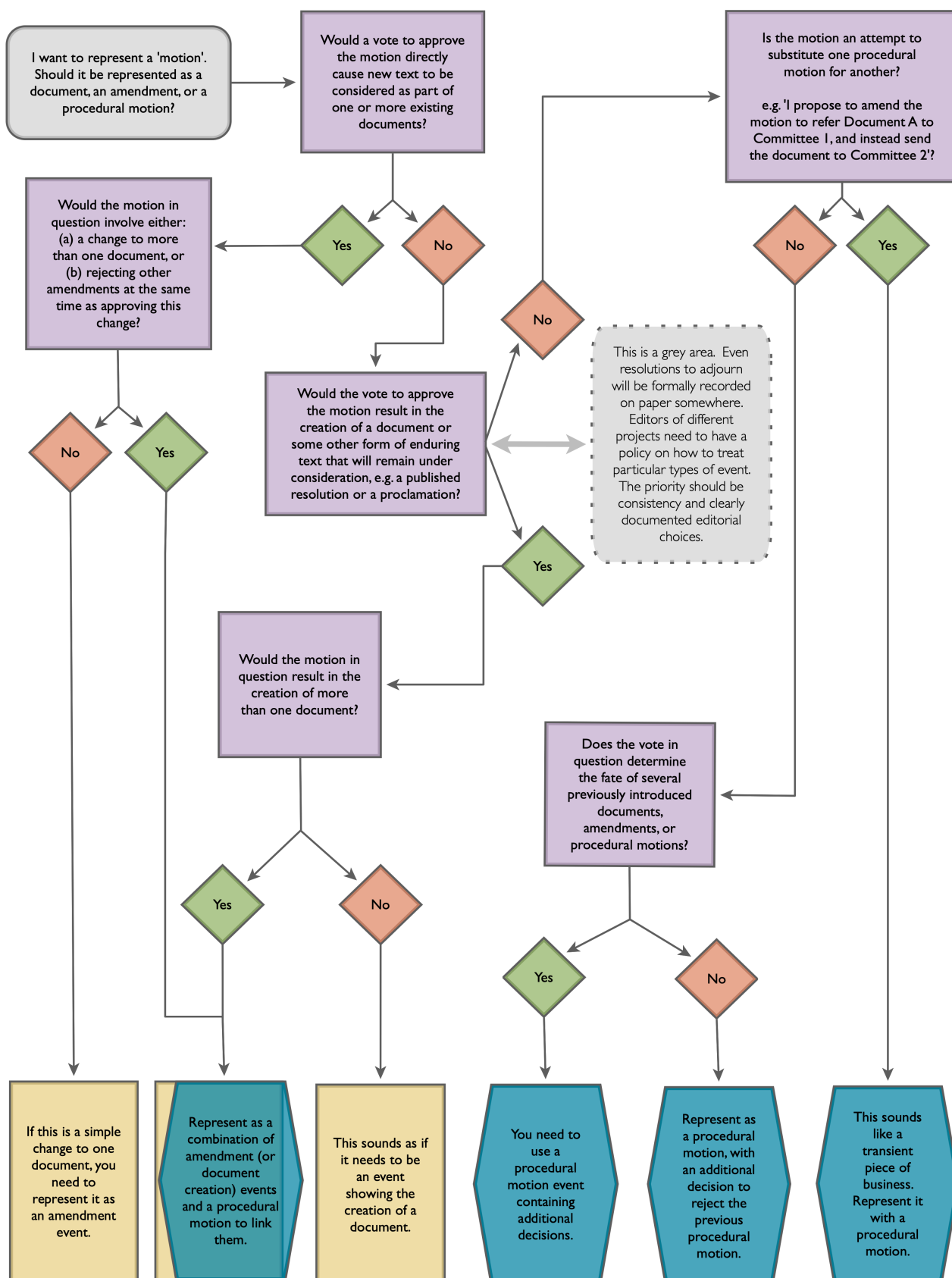
# The Two-Document Method

The following diagram represents the two document method of capturing line-by-line revisions:



# Documents vs. Procedural Motions

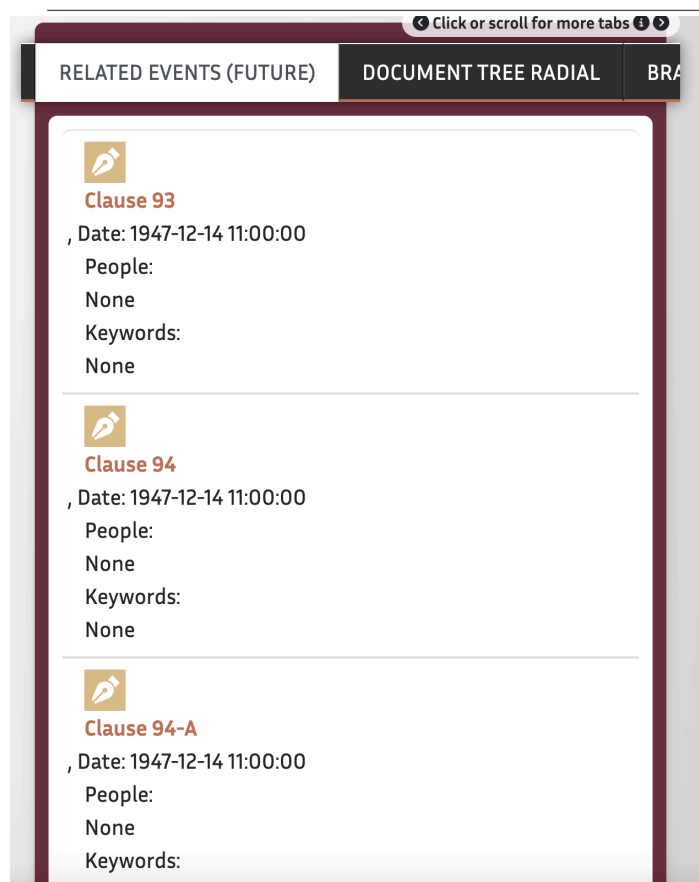
Individual project editors may want to adapt this flow chart for their own purposes and to ensure consistency.



# Final Steps

## Cleanup

When you have finished the initial modelling of a project, it's crucial that the modelling be checked to ensure that the timeline accurately represents the events described in the source materials and that the document text has been built accurately. Additionally, everything from event descriptions to document text to commentary collections must be proofread. The purpose of this final read-through is not only to check for spelling and grammar errors but also to make sure that a standardized style has been used throughout the project when it comes to things like document naming conventions, formatting of editor's notes, etc.



## Document Tracking

In keeping with Quill's interest in how the texts of foundational documents were created – including the various drafts that preceded the final document – the last important step in any Quill project is to do some document tracking. Document tracking is, essentially, tracing the movement of each document throughout the negotiation to ensure that it has been referred and copied in the correct places, in the correct order.

To do so, it will be particularly helpful to refer to the 'Related events (future)' tab (pictured left) in the event details. Look through the timeline for any 'refer' decisions, read the description to determine where the document should be referred, and click the 'related events' tab in the event details to check that the document was copied into the correct place.

This tab is available for each event in the timeline, but it is especially helpful for following how documents move among committees, and by extension, this step in the proofing process.

Once you've verified that all the documents have navigated the appropriate committees correctly, you are likely ready to go live. At this point, reach out to the Quill home team to discuss next steps.

# Appendix I : Modelling the UK Parliament

## Introduction to Modelling the UK Parliament

A note on this guide: This guide was prepared for interns modelling the European Withdrawal Acts 2019 and 2020, but would be widely applicable to modelling any legislation passing through the UK Parliament. The parliamentary procedure and quotes from Erskine May outlined in this guide are taken from the 24<sup>th</sup> edition from 2011. Earlier and later editions contain some changes that may bear upon your project. In familiarizing yourself with the procedure followed in a given parliamentary session, consult the edition of Erskine May that was the current edition at the time the negotiation was occurring.

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### Background

Proposed pieces of legislation are known in Parliament as ‘bills.’ Bills must pass through several stages in order to become law, and an understanding of these stages is important when it comes to modelling parliamentary debates in Quill.

A bill can begin in either the House of Commons or the House of Lords and must pass through three readings, a committee stage, and a report stage before being referred to the other house for consideration, where it must also pass through three readings, a committee stage, and a report stage. The bill is then sent back to the originating house so it can consider the amendments made by the preceding house. For example, if the bill originated in the House of Commons, it would, after it passed through the necessary stages, be sent to the House of Lords to be read, considered, and amended. Any amendments made in the House of Lords must be approved by the House of Commons, so after the bill passes through the necessary stages in the Lords, it is sent back to the Commons. The Commons would then adopt or reject the Lords’ amendments or make counter-proposals to their amendments. The bill would then be sent back to the Lords so that they could consider the Commons’ changes. This procedure would continue until both Houses agree to the text with no changes. Though formally called the ‘consideration of amendments’ stage, this procedure is colloquially called ‘ping-pong’, because of the rapid movement of the bill between chambers.

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### Bills Beginning in the House of Commons

#### Introducing a Bill/First Reading

According to established Parliamentary procedure, a member wishing to present a bill for consideration should, though it is not absolutely necessary, give notice to the Speaker of his or her intent to do so. The bill will then be set down on the Order of Business for a specific day. On that day, the Speaker will call the member in charge of the bill, who will present a ‘dummy bill’ to the Clerk. The Clerk will then read the

short title of the bill out loud. For Government bills, or bills created by the majority party, the dummy bill will have already been provided to the Clerk by the Public Bill Office. And when the member in charge of the bill is called by the Speaker, that member will move for its presentation. The Clerk will then read the title of the bill. This is considered the bill's first reading. The Speaker will then ask the member presenting the bill to name a day for the second reading, and the bill is then added to the Order of Business for that day and ordered to be printed.

There are other ways to introduce bills in the House of Commons (see Erskine May), though the way outlined above – in adherence to Standing Order 57(1) – is by far the most common.

## Second Reading

When that day arrives, the bill is called in its turn. The member in charge of the bill (or a member acting on his or her behalf) moves, 'That the bill be now read a second time.' Members may debate the merits of the bill, other solutions to the bill's object, how it was introduced to the house, etc. At this point, any member who especially objects to the second reading may move a 'reasoned amendment' to the motion for the second reading. A reasoned amendment is, essentially, a motion to amend the statement 'That the bill be now read a second time' by striking out all the words following 'That' and replacing them with other words. For example, following David Davis' motion for the second reading of the European Union (Withdrawal) Bill, Keir Starmer proposed a reasoned amendment. The amendment text read,

'I beg to move,  
to leave out from 'That' to the end of the Question and add 'this House respects the EU referendum result and recognises that the UK will leave the EU, believes that insisting on proper scrutiny of this Bill and its proposed powers is the responsibility of this sovereign Parliament, recognises the need for considered and effective legislation to preserve EU-derived rights, protections and regulations in UK law as the UK leaves the EU but declines to give a Second Reading to the European Union (Withdrawal) Bill because the Bill fails to protect and reassert the principle of Parliamentary sovereignty by handing sweeping powers to Government Ministers allowing them to bypass Parliament on key decisions, without any meaningful or guaranteed Parliamentary scrutiny, fails to include a presumption of devolution which would allow effective transfer of devolved competencies coming back from the EU to the devolved administrations and makes unnecessary and unjustified alterations to the devolution settlements, fails to provide certainty that rights and protections will be enforced as effectively in the future as they are at present, risks weakening human rights protections by failing to transpose the EU Charter of Fundamental Rights into UK law, provides no mechanism for ensuring that the UK does not lag behind the EU in workplace protections and environmental standards in the future and prevents the UK implementing strong transitional arrangements on the same basic terms we currently enjoy, including remaining within a customs union and within the Single Market.'

The question put on reasoned amendments is 'That the amendment be made,' and if agreed, the bill is effectively killed. If rejected, the question is then put on the motion for the second reading.



## **Committee Stage**

If the second reading is agreed by the house, the bill moves into the committee stage, where amendments may be proposed, and each clause of the bill must be agreed individually. In most cases, this stage of consideration takes place in a public bill committee, although in certain cases – most notably, bills of significant constitutional importance – bills may be considered in a Committee of the Whole House.

### ***Behaviour in Committee***

The rules observed by a committee are the same as those followed in a general house debate. Similarly, the committee is bound by the house's decision on the second reading and cannot amend the bill in a way that is destructive of its principle.

In a Committee of the Whole, the Chairman of Ways and Means or one of the Deputy Chairmen takes the chair. The person in the chair has the power to select amendments, new clauses, schedules, etc. from the tabled amendments to be proposed to the bill.

And unlike in the general House debates, members can speak more than once in the Committee of the Whole.

### ***Consideration of Bill Text***

Bills are typically considered in the following order: clauses, new clauses, schedules, new schedules, preamble, title. However, a motion can be made to consider the bill in a different order. This motion is known as a 'programme motion.'

### ***Amendments***

It is common practice to give notice of an amendment. This is known as 'tabling' the amendment. Notices of amendments are printed and circulated throughout the House on blue sheets the day after they are tabled. On the day the bill is to be considered in committee, the amendments are marshalled on a white amendment paper in the order in which the text of the bill is to be considered. Preference is given to amendments which propose text over amendments that merely strike out text and are grouped on the amendment paper accordingly. Otherwise, amendments are ordered (if they refer to the same point in the bill) in the order in which they were handed in, except for amendments made by the member in charge of the bill, which take precedence over all other amendments offered in the same place.

On the amendment papers, above the text of each amendment, is a list of names. These are the names of the members who support that amendment. In order to prevent identical amendments appearing on the amendment papers, the names of the first six members who propose the same amendment are listed above the amendment text. Members who support the amendment are listed below and to the right of the first six names.

As mentioned above, the chair has the power to select amendments to be considered in committee. He or she selects amendments from the list of tabled amendments, and these amendments are arranged in groups according to their subject matter and the order in which the clauses of the bill are to be considered. In

committee, the chairperson will call on the member who has tabled the first amendment of those the chairperson has selected for discussion. This amendment is the leading amendment, in other words, the amendment from this group that will be voted upon (in most cases). That member can now move his or her amendment. After an amendment has been moved, the chair reads it, states its location in the bill, and puts the question, 'That the amendment be made.' Typically, the chair will call the selected amendments in the order on the amendment paper. However, though the chair may select many amendments for consideration, he or she does not necessarily 'call' – or put the question on – all of them. The chair will often allow debate to range over several related amendments in order to prevent repetition in the debate later on as well as to ascertain which of the selected amendments the house wishes to vote separately on. But it is not uncommon for the chair to call only one or two of the selected amendments.

When the selected amendments have been considered, or when the chair deems that a clause has been sufficiently considered, he or she puts the question 'That the clause stand part' or 'That the clause as amended stand part.' If agreed, the clause will become part of the bill.

It is also possible that the amendments the chair selects for consideration be grouped with debate on the 'clause stand part' question for a particular clause. The same is true of new clauses and new schedules.

### **New Clauses**

Amendments that are not directly relevant to a clause under consideration can be proposed as new clauses. In theory, according to written parliamentary procedure, amendments are intended to clarify existing clauses, not replace them. By that principle, if a member wishes to substitute a new draft for an existing clause, the house must reject the question that the clause stand part, propose the alternative new clause, and then adopt it. This, however, is a cumbersome bit of procedure, and in practice, an alternative new clause is grouped with the existing clause it would replace.

New clauses are typically considered after the original clauses of the bill have been decided on, unless the committee decides otherwise. Unless a motion has been made to consider them in a different order, the new clauses are considered in the order in which they appear on the amendment papers. The member in charge of a new clause 'brings up' the clause, and it is read the first time. He or she then moves that the clause be read a second time. If the committee agrees to the second reading, it can propose amendments to the new clause. After amendments to the new clause have been considered, the question is put 'That the clause be added to the bill' or 'That the clause as amended be added to the bill'.

It is important to note, especially for Quill's purposes, that '[t]he decision on where in the bill a new clause, if agreed, is to be inserted is not a decision for the committee, but is left to be settled between the Member in charge of the bill and the Public Bill Office, which is responsible for reprinting the bill as amended' (Erskine May, 2011, p. 582).

### **Schedules**

Schedules often relate to particular clauses in the bill and give specific information about how that clause will be carried out. The question put on schedules is 'That this schedule [as amended] be the [first/second/etc.] schedule to the bill'. New schedules are considered in the same way as new clauses: brought up, read the first time, read the second time, amended, and added to the bill.

## **Preamble**

Because the preamble to a bill is subject to change depending upon the amendments made to the bill, it is implicitly postponed until after the clauses and schedules have been considered. The question put on the preamble is 'That this be the preamble of the bill.'

## **Report Stage**

When a bill has been entirely considered in committee, it must then be considered by the House. This is known as the report stage. The Chair proposes, 'That I do report the bill without amendment (or, as amended) to the House.' If this question is agreed, he or she leaves the Chair, and the Speaker resumes it. The bill is then reported to the House, usually by a government Whip.

If the bill has been reported from the Committee of the Whole and has not been amended, the third reading is ordered immediately or on a future day. If amendments have been made, the Speaker requests that the member in charge of the bill appoint a future day for the bill to be considered. The bill will then be reprinted before the next stage.

In the report stage, the bill is not considered clause by clause, as it is in the committee stage, though the House follows the same procedures for giving notice of amendments. The entire bill may be considered at once, and new clauses, schedules, and amendments may be proposed. The order of consideration in the report stage is: new clauses, amendments to clauses, new schedules, amendments to schedules. However, the House may move to consider the bill in a different order.

Additionally, members may speak only once to the same question.

When amendments to the bill have been considered, the Speaker calls upon the member in charge of the bill to name a day for the third reading. Typically, the third reading follows immediately.

## **Third Reading**

The question for the third reading follows the same procedure as that for the second reading. Members may debate the merits of the third reading and propose amendments to the motion for a third reading (reasoned amendments). Debate at the third reading is limited to the bill's contents, and amendments must be made verbally.

If the bill passes the third reading, it is recorded in the Votes and Proceedings as passed, and the bill is then referred to the Lords.

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## **Bills Beginning in the House of Lords**

Bills must pass through the same bill stages in the Lords as they do in the Commons, though as designated in the Lords' Standing Orders, no two bill stages may be undertaken on the same day except in extenuating circumstances. The convention is to wait two weekends between the first reading and the debate on the second reading; 14 days between the second reading and the committee stage and the committee stage and the report stage; and three days between the report stage and the third reading.

### **Introducing a Bill/First Reading**

Lords may present bills without notice or leave to do so. To present a bill, a Lord will rise after oral questions and read the bill's long title. He or she will then move for the first reading, and the question will be immediately put from the Woolsack (the seat of the Lord Speaker). As the contents of the bill have not been read, and the Lords do not yet know specifics of what the bill entails, the question for the first reading almost always passes without debate. The bill is immediately ordered to be printed.

The Lord in charge of the bill gives notice of the dates for the subsequent bill stages. Although, unlike the Commons, the dates of bill stages are subject to motions by any member of that House, as bills are considered to be 'in the possession of the House' as a whole once they have been introduced.

### **Bills Brought in from the Commons**

Once a bill that originated in the House of Commons has passed all of its stages, a clerk carries it to the House of Lords. The clerk informs the Lords that the bill has passed in the Commons, and the Chief Whip moves the first reading. Once the first reading is agreed, the bill is ordered to be printed. Additionally, a Lord will take charge of the bill, and this Lord is responsible for moving the second reading.

### **Second Reading**

Once the Clerk reads the notice for the second reading, the member in charge of the bill moves the second reading. The question 'that this bill be now read a second time' is put, and the Lords have opportunity to debate. If a Lord opposes the second reading, he or she may move an amendment that 'this House declines to give the bill a second reading.' That amendment can also include a reasoned amendment. Lords may also move amendments that function to put their reasons for supporting the second reading on the record. If an amendment opposing the second reading passes, the bill is rejected. But if such an amendment fails, the question is then put on the second reading.

### **Committee Stage**

Once the second reading is adopted, the bill enters the committee stage. In the House of Lords, the committee stage is undertaken in a Committee of the Whole or a Grand Committee. In the Lords committee stage, each clause and schedule must, as in the Commons, be ordered to stand part of the bill.

### **Amendments**

As in the Commons, amendments must be tabled. All tabled amendments on a given day are printed on a daily sheet with a maximum of four supporters' names above it. The amendments are not numbered at this point. Two days before the bill is considered in committee, the amendments are organized in the order that they pertain to the bill, numbered, and published the next day as a 'marshalled list'. Marshalled lists are published for each day of the committee stage. New amendments and amendments that have been altered are printed on the marshalled list with a star beside them.

Unlike in the House of Commons, all amendments in the Lords' marshalled list are called (except in cases of pre-emption), and the question put on amendments is 'that this amendment be agreed to'. In the House of Lords, a group of amendments can be moved *en bloc* if they are listed consecutively on the marshalled list and relate to the same clause or schedule. However, though a group of amendments may be moved at once, they must be voted upon separately.

### **Procedure in Committee**

As in the House of Commons committee stage, Lords may speak more than once to a motion in committee.

When the notice has been read for the committee stage, the Lord in charge of the bill moves 'That the House do now resolve itself into a committee upon the bill'. Opposition to this motion may be signified with a reasoned amendment or a motion to postpone the committee stage. If the committee stage lasts more than one day, the motion on following days is 'That the House do now again resolve itself into a committee upon the bill'.

The Committee of the Whole is presided over by a chairperson rather than the Lord Speaker, and the chairperson holds all the powers and duties of the Lord Speaker in a House sitting. Once the House has agreed to resolve into the committee, the Lord Speaker leaves the Woolsack.

The chair first puts the question that the title of the bill be postponed and then that the preamble be postponed. Then, the clauses of the bill are considered in order. The chair calls amendments to each clause, and once they have been considered, puts the question that the clause stand part.

Schedules are considered after the clauses they pertain to, and are amended in the same way as clauses.

The Committee of the Whole cannot adjourn consideration of the bill to a future day. If the consideration of the bill is not completed, the Committee must make a motion to resume the House sitting, and the bill is considered further on a future day.

When the committee stage is complete, the chair moves to report the bill to the House and that the House resume. If there have been no amendments to the bill, the Lord in charge of the bill can move that the

report be received and that the House move on to the third reading. However, it is more common that, even when the bill has not been amended in committee, it is amended on report.

## Report Stage

If the bill was amended in committee, the report stage cannot take place on the same day. On a subsequent day, the Lord in charge of the bill moves 'that the report be now received'. A reasoned amendment may be moved in opposition to the motion.

Once the motion is agreed to, amendments are called in the usual way. Amendments are tabled, marshalled, and grouped as they are in the committee stage.

The question that clauses and schedules stand part is not put on report. For this reason, if a Lord wishes to omit a clause from the bill, he or she must move an amendment to that effect.

On report, a Lord (aside from the Lord in charge of the bill) may not speak to more than once to an amendment without the leave of the House.

## Third Reading

Once the report stage is finished, it is moved 'that this bill now be read a third time', a motion that is usually taken without debate. Some bills require the Queen's or Prince of Wales's consent, and this consent is signified at this point.

Once the motion for the third reading has been agreed, amendments may be moved in order to clarify any uncertainties in the bill or improve the drafting. Once the amendments have been disposed of, the motion 'that this bill do now pass' is moved. This motion can be debated, and reasoned amendments may be moved to it. When the bill passes, it is sent to the Commons for its consideration.

## Ping Pong

When the Lords have passed a bill that originated in the Commons, the former House returns the bill to the Commons with a message that the bill was agreed with amendments and that the Lords require the Commons' agreement. The amendments are listed in a separate document which is enclosed with the bill.

## Consideration of Lords Amendments

In this stage, the Speaker calls the Lords amendments one by one. The Commons may either propose an amendment to the Lords amendment or move 'That this House agrees (or disagrees) with the Lords in the said amendment'. Notice is usually given for amendments and motions to disagree. If a motion to disagree with a Lords amendment is negatived, the amendment is effectively agreed to.

If the Commons agrees with all of the Lords amendments, the former House sends a message to the latter informing them accordingly, and the bill then awaits Royal Assent. However, if the Commons wishes to

disagree to any Lords amendments, they have a few options. The Commons can (1) simply disagree to the amendment or (2) amend the amendment by omitting words, substituting words, or inserting words. They may (3) agree to an amendment with a consequential amendment of their own. In other words, they may agree to a Lords amendment with the condition that the Lords accept a Commons amendment that is consequential upon the original Lords amendment. They may (4) disagree to the Lords amendment and substitute an amendment in lieu. They may (5) divide a Lords amendments into parts to be voted on separately. Finally, they may (6) agree to a Lords amendment but the words proposed to be inserted may be moved to another part of the text.

If the Commons disagrees to a Lords amendment but offers no alternate proposal, a select committee must be appointed to draft reasons for disagreement. This is not necessary if the Commons offers an alternative proposal.

The Commons then sends the Lords a message communicating their conclusions in considering the Lords amendments. Once the bill is returned to the Lords, the House must consider the Commons (1) reasons, (2) amendments, and (3) consequential amendments. For (1), the Lords may choose to (a) not insist on their amendment, (b) not insist on their amendment but propose an amendment in lieu, or (c) insist on their amendment and give a reason. For (2), the Lords may (a) agree the Commons amendment, (b) disagree and give a reason, or (c) propose further amendments to or in lieu of the Commons amendments or make consequential amendments. For (3), the Lords options are the same as in (2). The Lords then send the Commons a message communicating their conclusions and desiring concurrence if necessary.

If the Lords do not insist on their amendments or agree to any Commons amendments, they send a message to the Commons indicating as much, and the bill proceeds to Royal Assent.

If agreement has not been reached in the Lords, the Commons will create an order based on the Lords message and either consider it immediately or assign further consideration for a future day.

This process could, in theory, continue indefinitely, but, in practice, attempts are made at a compromise. A bill is usually lost in the case of 'double insistence', where one House insists on its amendment and the other insists on its disagreement to that amendment.

## **Royal Assent**

Once the bill has been agreed by both Houses, it awaits Royal Assent. To achieve this, the Lord Chancellor submits to the Queen a list of bills ready for Royal Assent. The Houses are usually informed of Royal Assent separately. In the Commons, the Speaker will say, 'I have to notify the House, in accordance with the Royal Assent Act 1967, that the Queen/King has signified her/his Royal Assent to the following Acts [and Measures]', which he then lists. The Clerk of the Parliaments then endorses the Acts with the customary formula, though this is not spoken or recorded in Hansard.

Royal Assent may be signified in the Lords at any convenient time. The same words are used as in the Commons.

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## Bill Stages Overview

First reading → second reading → committee stage → report stage → third reading → referred to other house → first reading → second reading → committee stage → report stage → third reading → consideration of amendments (ping pong) → royal assent

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## Useful Terms

**Clauses:** part of a bill. A bill is made up of individual clauses which may be debated separately in Parliament. Any clause can be removed or amended – and new clauses may be added – before a bill is passed.

**Committee of the whole House:** a House of Commons committee comprised of all MPs. A Committee of the whole House is sometimes used instead of a Public Bill Committee for some or all of a Bill's committee stage in the Commons. When the House sits as a committee it is chaired by the Deputy Speaker/Chairman of Ways and Means from a seat at the Table of the House. Committees of the whole House are favoured for Bills of constitutional or ethical importance and for parts of the annual Finance Bill.

**Committee stage:** where a bill is considered line-by-line and is normally the next stage after a Bill's second reading. It is an opportunity for changes to be made to the wording or for new clauses to be added. In the Commons this task is normally done by a small number of MPs in a Public Bill Committee. Occasionally it is done in the Chamber by a Committee of the whole House, as is usual in the Lords.

**Division:** divisions are used for counting those in favour or against a motion when there is a vote in the House of Commons or the House of Lords. The House literally divides, with members choosing to file through one of two lobbies on either side of the Chamber where they are counted and their names recorded.

**Erskine May:** Thomas Erskine May's guide to parliamentary practice is properly entitled 'A treatise on the law, privileges, proceedings and usage of Parliament' but is commonly referred to as Erskine May. It is generally held to be the most authoritative reference book on Parliamentary procedure.

**First Reading:** formal introduction of a Bill to the House of Commons or the House of Lords. The Bill is not debated at this stage, but a date for its Second Reading in that House is set, a bill number is allocated, and an order is made for it to be printed.

**Give way:** term used by MPs who want to interrupt an MP who is speaking in the House of Commons. An MP cannot intervene when another MP is speaking to the House unless that MP allows it by giving way. There is no equivalent phrase in the House of Lords although some Lords who are former MPs occasionally still use the term.

**Hansard:** the Official Report, an edited verbatim report of proceedings in both the House of Commons and the House of Lords.



**Motion:** proposal put forward for debate or decision in the House of Commons or House of Lords. A motion must be proposed (moved) before any debate or vote can take place in Parliament.

**Order paper:** also known as the Order of Business; in the House of Commons an order paper is published each sitting day and lists the business of the House and business for sittings in Westminster Hall. It shows items such as questions, motions, business, notices of committees, announcements and lists of future business.

**Ping pong:** refers to the to and fro of amendments to Bills between the House of Commons and the House of Lords.

**Point of order:** appeal to the Chair or Speaker for clarification or for a rule on a matter of procedure in the House of Commons. The MP must explain their reasons for believing the rules of the House to have been broken, and the Speaker decides whether it is a valid point of order or not.

**Programme order:** a motion restricting time for one or more stages of a bill.

**Public bill:** proposed changes to the law as it applies to the population in general.

**Report stage:** Bill stage following its Committee Stage. The whole House, either the House of Commons or the House of Lords, reviews the amended form of the bill and can make further progress.

**Royal Assent:** Monarch's agreement that is required to make a Bill into an Act of Parliament. While the Monarch has the right to refuse Royal Assent, nowadays this does not happen; the last such occasion was in 1707, and Royal Assent is regarded today as a formality.

**Schedule:** part of a Bill or Act that appears after the main Clauses in the text. They are often used to spell out in more detail how the provisions of the Bill are to work in practice.

**Second Reading:** the first opportunity for a Bill to be debated in either House and is the stage where the overall principles of the Bill are considered.

**Standing orders:** written rules which regulate the proceedings of each House.

**Table (tabling):** the act of formally putting forward a question, a motion or an amendment in the Commons or the Lords. Members do this by submitting it to the procedural clerks by hand, post, or digitally. The item will then appear in the next day's business papers, etc.

**Third Reading:** one of the Bill stages and the final opportunity for the Commons or Lords to decide whether to pass or reject a bill in its entirety.

\*Definitions from the parliament.uk Glossary and the Guardian's Glossary of Parliamentary Terms

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## Useful Phrases

Clause stand part

That the amendment be made

Called

Selected

Ordered to stand part

# UK Parliament: Data Entry

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## Gathering Resources

To find resources about a bill in Parliament, visit [www.parliament.uk](http://www.parliament.uk). On the menu banner at the top of the page, hover over the 'Business' tab and select 'Bills & legislation' from the dropdown.

On this page, select the bill you are attempting to model, whether it is one of the 'Bills before Parliament' or 'Bills in previous sessions'. If you are modelling a bill that is currently before Parliament, click this option. You will be directed to a page with all the bills before Parliament in the present parliamentary session. If you are modelling a bill from a previous session, you will be directed to a page listing previous parliamentary sessions. Once you select a session, you will be directed to a list of the bills that were before Parliament in that session. Select the appropriate one.

Once you have selected the bill you wish to model, you will be taken to a page with information about that bill, including the type of bill, sponsors, House in which it originated, bill documents, etc. It is helpful to review this information.

In the top banner, select 'Stages'. This will provide you with the dates on which this bill reached each major milestone in the consideration process. This will tell you how to set up your negotiation, e.g. on which date to begin your timeline, when the various sessions took place, etc.

Next, select the 'Publications' tab. This will take you to a page with links to parliamentary publications related to the bill. Here, you will find the text of the bill as originally introduced, as well as amendment papers and other relevant documents.

Per parliamentary procedure, MPs who wished to propose an amendment to a bill must submit their proposed amendments to the Speaker's table in writing before the debate is scheduled to occur. These amendments (on blue sheets) are compiled, numbered, and circulated to the MPs prior to the debate.

Under the 'Amendment Papers' heading are these amendment documents, which are comprised of all of the amendments that had been tabled up until that date.

MPs would also be given a second type of amendment document (on white sheets). These documents are linked under the 'Selection of amendments: Commons' heading and are, essentially, a consolidated list of amendments that have been selected and compiled according to their relevance to the subjects of discussion on that day. In most cases, these documents and the amendments included therein will be grouped according to clause. This document would serve as a rough agenda for the debate on that day.

A good thing to keep in mind when modelling the record is that all of the text from the Hansard entries listed on the 'Bill Stages' page will end up in the Quill timeline.

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## House of Commons: First Reading

Refer to the Stages tab again. This page provides dates and links to the corresponding Hansard entry for each sitting on a Bill. To begin modelling the first reading, click on the link to the Hansard entry for the first reading.

Often, first readings are given without debate, though that is not always the case. To model the presentation of the bill, create a new document (legislation subtype) with the text of the bill as introduced. Title this document [Name] Bill as Introduced. The description text will read something like 'Presentation and First Reading (Standing Order no. 57)...Bill read the First time; to be read a Second time tomorrow and printed with explanatory notes'. However, you will include the text as it appears in Hansard for your project.

Erskine May dictates that the question on the bill's first reading, the order for printing, and the appointment of a future day for the second reading are taken together in one stage. So create a procedural motion entitled 'Motion for the First Reading, Printing, and Appointment for Second Reading'. Add an 'other/reject' subdecision to the motion, and then adopt it.

Typically, after the first reading is agreed, the House will adjourn. Adjournment is almost always the result of a motion to adjourn, though Hansard does not always record such a motion. Such a motion, however, is implied. Represent this motion - whether explicit or implied - as a procedural motion entitled '[Implied] Motion to Adjourn' and adopt it.

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## House of Commons: Second Reading

On the day for the second reading, an MP will move 'That the Bill be now read a Second time.' Represent this motion by creating a new 'resolution' document. This motion may, at first glance, seem more suited to a procedural motion. However, because this is a motion to which amendments can be, and often are, moved, it works better as a document. Title this document 'Motion for a Second Reading'. The document text will be the text of the motion ('That the Bill be now read a Second time.').

If someone moves an amendment to the motion, create a 'propose document amendment' event. Amendments to a motion for a second reading entail striking out all of the words after 'that' in the original motion and substituting them with different words. For an example, see e110199.

Read the debates in Hansard and create debate events which correspond to the appropriate motion. At this stage, the debates will most likely pertain to the motion for the second reading rather than the amendment.

At times, the Speaker may interject in a debate to impose time limits on speeches or call the House to order. Represent these interjections as procedural motions ('Limit on Back-Bench Speeches', 'Call to Order', etc.) and adopt them with a decision by 'chairperson/other'.

To conclude the debate on the amendment and motion for a second reading, the Speaker will put the question 'That the amendment be made.' Represent this question as a procedural motion entitled 'Motion

that the Amendment Be Made' with an 'adopt' subdecision. Then, adopt or reject the amendment as the record dictates. If the amendment is rejected, the Speaker will put the question 'That the Bill be now read a Second time.' Similarly, represent this as a procedural motion entitled 'Motion for a Second Reading' with an 'accept/reject' subdecision on the original motion document. Then adopt or reject the procedural motion as the record dictates.

If the motion for the second reading is adopted, the House will decide upon a program motion. Create a new 'resolution' document with the proposed programme motion as the document text. Title the document 'Programme Motion'. If the House proposes a Money Resolution or a Ways and Means Resolution, follow the same procedure. Then adopt or reject the motion as appropriate.

If the programme motion is agreed, the bill will be committed. In other words, the bill will leave the House and enter the Committee. Whether the bill will be committed to a select committee or a Committee of the Whole will be specified in the programme motion. Using the programme motion as a guide, create a procedural motion entitled 'Motion to Commit the Bill to a Committee [of the Whole.]' Add a 'Report/refer' subdecision on the procedural motion that links to the 'Bill as Introduced' document. Adopt or reject the motion as appropriate. If the motion is adopted, the bill document will leave the House of Commons.

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## House of Commons: Committee Stage

At this point, you will switch to the Committee of the Whole (Commons) and begin modelling there. The first thing you must do is copy in the bill document that was referred from the House of Commons. To do so, create a 'Copy a document' event. Select 'House of Commons' from the 'Committee name' dropdown, and the session when the document was referred from the 'Session date' dropdown. The documents may take a moment to load in the 'Document name' dropdown, but once they do, select the Bill as Introduced document. Copying this document into the Committee demonstrates the document's passage from the House to the Committee so that the Committee could consider and amend it.

In a typical Quill model, we would use the 'two document' method you read about in the Quill Data Entry guide. The procedure for the two document method is that for documents that are considered clause by clause, we would create a document with the full text (the document you just copied into the Committee would be an example of this). Then we would create a blank base document onto which we would propose clauses and amendments as they came under consideration in the record. However, in a modern negotiation, there can be so many amendments that representing them in this way is not intuitive. Rather, for Parliamentary negotiations, we take a different approach which attempts to capture the process of tabling amendments.

Create a blank legislation document entitled 'Bill as Amended in Commons Committee Stage'. For the body of the text, put the numbers for the clauses and schedules. It is important to note that if at any point you create a blank document to a Quill timeline and attempt to amend it later, it will cause text corruption. For this reason, always add document text, even if it's just a title in square brackets or the numberings and headings.

Add the bill as introduced as the ancestor document.

Propose the long title/preamble and each original clause and schedule onto this document individually. In other words, propose an amendment to the document you just created with the text of the title and preamble. Then, propose a separate amendment with the text of Clause I, an amendment with the text of Clause II, and so on.

Once you have finished adding the original clauses and schedules, refer to the amendment papers. You can find the amendment papers for that session on [parliament.uk](http://parliament.uk) on the 'Publications' page. Add all of the amendments as individual amendment events to the original clauses and schedules in the order that they appear on the papers. If an amendment is tabled on a day that the Commons did not sit to discuss the bill, add that amendment in the next official sitting.

Once you've added all of the amendments, refer to Hansard to begin modelling the debate. In the House of Commons, the amendments are not considered in number order. An MP will move an amendment - the leading amendment - and the chairperson will group with this amendment other amendments that would have a similar effect on the text of the bill. These moments in the record are easy to locate because the MPs follow a sort of script. The MP moving the leading amendment will say something like, 'I beg to move that the clause be read a second time' or 'I beg to move [the amendment]'. The chairperson will respond, 'With this it will be convenient to discuss the following...' and then list a group of amendments. To represent the motion for second reading on a new clause or the moving of an amendment, create a procedural motion called 'Motion that New Clause X Be Read a Second Time' or 'Amendment X Moved', whichever is appropriate. If the leading amendment is a new clause, add an 'Other or Reject' subdecision; if it is an amendment, add an 'Other' subdecision. A motion that Amendment X be moved (but not a motion that a new clause be read a second time) is usually followed by a 'no objection' vote.

To model the chairperson's selection of amendments, add a procedural motion entitled 'Grouping of Amendments'. Add an 'other' subdecision for every amendment in the list. These subdecisions represent those amendments being put forward for consideration. This motion will, in most cases, be followed by a 'no objection' vote.

Then, read through the debates, creating debate events that link to the corresponding amendments.

After some discussion, the question will be put, 'That the amendment be made.' Represent this question as a procedural motion ('Motion that Amendment X Be Made') with an 'accept/reject' subdecision. If the House agrees to the amendment, add an 'adopt' decision to the procedural motion. This will cause the amendment text to be incorporated into the bill. If the House rejects the amendment, add a 'reject' decision. Repeat this process for each of the leading amendments.

For Bills that follow a programme motion, when the allotted time for considering amendments to a clause runs out, the chair will put the question 'That the Clause stand part.' Add a procedural motion ('That Clause X Stand Part') with an 'accept or reject' subdecision on the entire clause. Then, adopt or reject the procedural motion as appropriate.

Repeat these steps as necessary.

If many amendments are made to the bill during this stage, there will likely be some editorial changes to reflect new numbering of subclauses, punctuation changes to facilitate understanding, etc. At the end of the stage, propose an amendment with the text as it is presented in the next stage to account for these editorial changes. In this case, for example, at the end of the Commons Committee stage, propose a document amendment with the text of the bill as it presented to the House on Commons Report. If no amendments are made on a stage, this step is not necessary.

Each Committee sitting ends with the Committee moving to rise. This procedure is not always recorded in Hansard. In the event that the motion to rise is not in the record, create an implied motion. To do so, add a procedural motion with the title 'Implied Motion to Rise' and agree it.

To keep the timeline tidy and facilitate data entry, it is useful in the House of Commons to drop the amendments that were grouped with the leading amendment but not voted upon. They can be dropped with an 'Implied Motion to Drop the Amendments that Were Not Called'. Add a procedural motion with 'drop' subdecisions for all the relevant amendments and then adopt it. This will remove those amendments from the dropdown lists during data entry.

Once you've modelled all the Committee sittings, the bill as amended in Committee must be referred back to the House. To do this, add a 'report/refer' vote, and then in the main House, add a 'Copy document' event.

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## House of Commons: Report Stage

The Report stage occurs back in the main House. As you've read in this guide, the Commons does not consider the bill clause by clause on Report. For this reason, you do not have to propose the clauses and schedules individually and then propose the amendments onto them. Rather, once you've copied in the report from the Committee, add a new legislation document entitled 'Bill as Amended in Commons Report Stage'. Select the Bill as Amendment in Commons Committee Stage as the ancestor document. For the text of the document, add the text of the bill as amended in Committee. You can find this text on the 'Publications' page under the 'Bills' heading. If there were no amendments made in Committee, the text is the same as it was when introduced.

Refer to the amendment papers and individually propose onto the document all the amendments that were tabled up to the session.

Once you've added all of the amendments, refer to Hansard to begin modelling the debate. The structure of the debate (e.g. leading amendments, grouping of amendments, debates, etc.) is the same on Report as on Committee.

Then, read through the debates, creating debate events that link to the corresponding amendments.

Like at the end of the Committee stage, propose an amendment with the text of the Bill as presented on Third Reading in order to account for the editorial changes to the bill after the Report stage is concluded.

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## House of Commons: Third Reading

As the third reading takes place in the House, often immediately following the conclusion of Report, there is no need to refer and copy the bill as amended on Report, as you did in previous stages.

An MP will move that 'That the Bill be now read a Third time'. Represent this as a new 'resolution' document, as, like the second reading, this motion can be amended. There will likely be some debate on the motion, which is modelled in the usual way. Then, if someone proposes a reasoned amendment to the motion, propose an amendment to the motion, changing the proposed text as the record indicates.

Represent the question 'That the amendment be made' as a procedural motion entitled 'Motion that the Amendment Be Made'. Add an 'accept/reject' subdecision to the procedural motion. Then, adopt or reject the amendment according to the record.

Then add a procedural motion entitled 'Motion that the Bill Be Now Read the Third Time' with an 'other/reject' subdecision. Adopt or reject the motion according to the record.

Once the third reading is agreed, the bill must be referred to the House of Lords. To do this, add a 'report/refer' vote on the bill as amended on Commons Report.

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## House of Lords: First Reading

Copy the Bill as Amended in Commons Report Stage into the House of Lords.

The first reading is not usually opposed in the House of Lords, and so there is no record of a motion and agreement in Hansard. However, to represent this procedure, add a procedural motion entitled 'Motion that the Bill Be Read the First Time and Printed', with an 'other/reject' subdecision on the Bill as Amended on Commons Report. Adopt the procedural motion.

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## House of Lords: Second Reading

On the day of the second reading, create a new 'resolution' document ('Motion for the Second Reading'). Model the debates and any reasoned amendments to the motion as you did in the House of Commons. In the event of a motion to withdraw the amendment, create a procedural motion ('Motion to Withdraw the Amendment') with a 'drop' subdecision on the amendment. In the House of Lords, if there is no formal opposition to the motion under consideration, that motion is considered to be agreed. So if the reasoned amendment is withdrawn or rejected, there is no longer any formal opposition to the motion, and it is adopted. However, there will be a note of this in Hansard, which will say something like, 'Bill read a second time and committed to a Committee of the Whole House.' Represent this simply as a vote to adopt the motion for second reading.

Then, refer the Bill as Amended on Commons Report to the Committee of the Whole (Lords).



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## House of Lords: Committee Stage

The Lords Committee stage begins like the Commons Committee stage. After you copy in the Bill as Amended in Commons Report Stage, create a new legislation document with the title 'Bill as Amended in Lords Committee Stage'. Add the bill as introduced to the Lords (i.e. the Bill as Amended in Commons Report) as the ancestor document. For the text of the document, add the numbers and headings for the clauses and schedules.

Propose the long title/preamble and each original clause and schedule onto this document individually. In other words, propose an amendment to the document you just created with the text of the title and preamble. Then, propose a separate amendment with the text of Clause 1, an amendment with the text of Clause 2 and so on.

Once you have finished adding the original clauses and schedules, refer to the amendment papers (called Marshalled Lists in the Lords) for that session and add the amendments as amendment events to the original clauses and schedules in the order that they appear on the Marshalled List.

In the Lords, the question is not put that each individual clause stand part. For this reason, if a Lord opposes a clause, he or she will table their intention to oppose that that clause stand part of the bill. Doing so prevents the clause from automatically being taken into the bill once all of its amendments have been considered. To represent this procedure, add a procedural motion entitled 'Motion to Oppose that Clause X Stand Part' with an 'other' subdecision. These motions can be dropped once the clause is accepted or rejected.

Once you've added all of the amendments, refer to Hansard to begin modelling the debate. In the House of Lords, tabled amendments are compiled into a Marshalled List, with the amendments arranged in the order in which they pertain to the text. The Lords do not select and group amendments like the Commons, but consider each tabled amendment in number order. New Marshalled Lists are printed for each sitting to include any new amendments that have been tabled or existing amendments that have been altered. In theory, these new or altered amendments should have a star beside them on the Marshalled List to make them easy to spot. However, this is not always the case, and you will have to compare each new Marshalled List with the previous one in order to find the new amendments. Add new amendments in the first session after they are tabled. If an amendment is withdrawn on the Marshalled List, drop that amendment in the first session afterwards. See s4670 for an example.

To move an amendment, create a procedural motion with an 'other' subdecision entitled 'Amendment X Moved'. In most cases, amendments will be moved with no objection, in which case, you would immediately create a 'no objection' decision event. In some rare cases, someone will attempt to move an amendment that is out of order, and someone will object. In this case, add a reject decision.

Then, read through the debates, creating debate events that link to the corresponding amendments.

Once an amendment has been deemed sufficiently debated, the mover of the amendment will decide whether they wish to withdraw their amendment or put it to a vote. In the former instance, the Lord will

'beg leave to withdraw the amendment'. This is a procedural motion ('Motion to Withdraw Amendment X') with a subdecision to 'drop' the amendment. This is usually followed by an 'adopt' decision. In the latter instance, the Lord will say he or she wishes to 'test the opinion of the House'. This is also a procedural motion ('Call for a Division on Amendment X') with an 'other' subdecision on the amendment. This is usually followed by an 'adopt' decision made by 'Chairperson/other'.

If the records say that an amendment was not moved, drop it at that point in the timeline.

In instances where opposition to a clause has been tabled, the House must make a decision on that clause. To represent this, add a procedural motion ('Motion that Clause X Stand Part') with an 'accept/reject' subdecision. This motion will be debated as normal. And once the House has considered whether the clause should stand part, drop the 'Intention to Oppose that Clause X Stand Part' procedural motion that you created earlier from the Marshalled List. Then adopt or reject the Clause Stand Part motion as appropriate.

In instances where no opposition to a clause has been tabled, that clause will be tacitly taken into the bill once all of its amendments have been considered. For this reason, there will not be a note in Hansard that the clause has been adopted. However, we must still represent the clause being taken into the text. To do so, add a decision event with an editor's note explaining that the clause as amended was taken into the text of the bill.

Repeat this procedure until all of the amendments have been disposed of. If many amendments are made to the bill during this stage, there will likely be some editorial changes to reflect new numbering of subclauses, punctuation changes to facilitate understanding, etc. At the end of the stage, propose an amendment with the text as it is presented in the next stage to account for these editorial changes. In other words, the text of the bill as it is presented on Report. If amendments have been made in the Committee, this amended text will be found on the 'Publications' page under the heading 'Bills'. If no amendments are made on a stage, this step is not necessary.

Once the Committee has agreed upon the text, it will refer the document back to the main House. Add a 'report/refer' vote and copy the document into the House of Lords.

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## House of Lords: Report Stage

The Report stage occurs back in the main House. As you've read in this guide, the Lords does not consider the bill clause by clause on Report. For this reason, you do not have to propose the clauses and schedules individually and then propose the amendments onto them. Rather, once you've copied in the report from the Committee, add a new legislation document entitled 'Bill as Amended in Lords Report Stage'. Select the Bill as Amended in Lords Committee Stage as the ancestor document. For the text of the document, add the text of the bill as amended in Committee. You can find this text on the 'Publications' page under the 'Bills' heading. If there were no amendments made in Committee, the text is the same as it was when introduced.

Refer to the marshalled lists and individually propose onto the document all the amendments that were tabled up to the session.

Once you've added all of the amendments, refer to Hansard to begin modelling the debate. The Lords consider every amendment on Report just as they do in Committee. Then, read through the debates, creating debate events that link to the corresponding amendments.

Like at the end of the Committee stage, propose an amendment with the text of the Bill as presented on Third Reading in order to account for the editorial changes to the bill after the Report stage is concluded. If no amendments are made on a stage, this step is not necessary.

Sessions on Report, as they take place in the main House, end with a motion - explicit or implied - to adjourn. If the House does not adjourn immediately after they consider the bill, check the 'Contents' tab of that day's Hansard record, select the last entry in the list and scroll to the bottom to find the adjournment time.

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## House of Lords: Third Reading

If changes were made to the bill during Report, a new version of the bill is printed for the Third Reading. However, at this stage, the House does not consider the bill clause by clause. Any amendments are for the purpose of tidying up the bill, and they are still considered in the order in which they pertain to the text. Create a new document ('Bill as Amended on Lords Third Reading') with the text of the bill as agreed on Report. For the ancestor document, select 'Bill as Amended on Lords Report'.

If the bill requires the Queen's or Prince of Wales' consent, this consent will be signified before the motion for Third Reading. The language used for the Queen's consent is something like: 'I have it in command from Her Majesty the Queen/His Majesty the King to acquaint the House that Her/His Majesty, having been informed of the purport of the [bill], has consented to place her/his prerogative and interest, in so far as they are affected by the Bill, at the disposal of Parliament for the purposes of the Bill.' Represent this as a procedural motion ('Queen's/King's Consent') followed by a 'No objection' vote.

Before the House begins to consider any amendments on Third Reading, there will be a motion 'That the Bill be read a third time.' Represent this as a procedural motion with an 'other/reject' decision on the 'Bill as Amended on Lords Third Reading'.

Refer to the Marshalled Lists and propose the amendments.

Once you have added the amendments, refer to Hansard to move amendments and add the debates as you did for previous stages.

Once the House has considered all of the amendments on Third Reading, the Lord in charge of the bill will move 'That the Bill do now pass.' Add this motion as a 'resolution' document ('Motion that the Bill Do Now Pass'), as this motion is subject to amendments. As with motions for second or third readings, a Lord may move an amendment to this motion by striking out all the words after 'That' and substituting new words. If a Lord proposes an amendment to this motion, add it as you've done previously.

If any amendments were proposed to the motion that the bill pass, the Speaker will, once the debate has concluded on that amendment, move 'That the amendment be agreed to.' Represent this as a procedural motion ('Motion that the Amendment Be Agreed To') with a subdecision to adopt/reject the amendment. Record the debate and votes on this motion and any amendments.

Once the bill is agreed, refer it to the Commons for the Ping Pong stage.

In the next bill stage, the Commons will consider each amendment agreed by the Lords. On the Bill Documents page for the Bill on Parliament.uk, refer to the document entitled 'Lords Amendments to the Bill' under the 'Bills' heading. Use this text to create a new document in the timeline entitled 'Lords Amendments to the Bill.' Refer this document to the Commons as well.

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## Ping Pong: Commons

Copy in the Bill as amended in the Lords and the list of amendments agreed in the Lords. If the Lords proposed many amendments to the Bill, the Commons will determine a programme motion at this time. If the Commons creates a programme motion, create a document entitled 'Programme Motion' with the proposed order for the document text. Adopt or reject the programme motion as appropriate.

Create a new document entitled 'Commons Consideration of Lords Amendments (Ping Pong)'. For the document text, write '[Amendments to the Bill as Agreed in the Commons]'. Then, propose each of the Lords Amendments onto this document.

Once you've proposed each of the Lords Amendments to the document, refer to the Amendment Paper entitled something like 'Commons Consideration of Lords Amendments.' Propose each of these amendments to the Lords Amendments you just added. If, on the amendment paper, the Commons tables an intention 'To move, That this House disagrees with the Lords in their amendment', represent that as a procedural motion entitled 'Intention to Disagree with Lords Amendment X'. Add a subdecision to reject that amendment.

The Commons does not number its amendments on the amendment papers at this stage, but rather, assigns them a letter in parentheses on the right-hand margin of the page.

If the Commons proposes an amendment to a Lords amendment, propose the amendment to the appropriate Lords amendment and title it 'Commons Amendment (x) to Lords Amendment X.' If the Commons proposes an amendment in lieu of a Lords amendment, propose an amendment to the appropriate Lords amendment that strikes out the Lords amendment and inserts the Commons amendment in its place.

If some MPs propose an amendment in lieu of a Lords amendment, other MPs may still propose amendments to the Commons amendment in lieu. These amendments will be labelled with lowercase Roman numerals in parentheses on the right-hand margin of the page.

Once you added all of the amendments and intention to disagree events, refer to Hansard to begin modelling the debates.

The House of Commons has power over the House of Lords to decide on matters of taxes and public spending. This is known as 'financial privilege', and if the Commons may exercise this privilege over any of Lords amendments, the Speaker would signify which amendments at this point. Represent this as a procedural motion ('Notification of Financial Privilege') with 'other' subdecisions on each of the named amendments and agree it with a 'no objection' vote.

Previously, you likely tabled some procedural motions, per the Commons amendment papers, to signify an intention to disagree with a Lords amendment. When that opposition is formally moved (in Hansard, 'I beg to move, That this House disagrees with Lords amendment x'), create a procedural motion entitled 'Motion to Disagree with Lords Amendment x' with an additional decision to adopt the 'Intention to Disagree' proposal.

[Note: Future iterations of this Guide will include appendices containing a style guide, resource collection spreadsheet template, and a checklist for archive visits.]