



Behind the scenes of historical research: propositions about handling and the documentary treatment of printed periodicals¹

Nos bastidores da pesquisa histórica: proposições sobre manipulação e tratamento documental de impressos periódicos

Entre bastidores de la investigación histórica: propuestas sobre el manejo y tratamiento documental de publicaciones periódicas

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Abstract

This paper presents technical and operational procedures for the compilation of periodical printouts and the digital reproduction in databases, considering the reference of the New Cultural History, according to Roger Chartier. It is argued that, in the historiographical treatment of these forms, materialities and textualities are interdependent dimensions in the production of meanings. This results in the need to use specific protocols, according to research objectives and problems, to register the material, textual and graphic characteristics of the periodical printouts in its original support. Such practice facilitates the subsequent consultation, interpretation and analysis of the investigated editions, even without their physical presence.

Keywords: Historical Sources. Periodical press. Roger Chartier.

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Resumo

Este artigo apresenta procedimentos técnico-operativos para a compilação de impressos periódicos e sua reprodução digital em bancos de dados, considerando o referencial da Nova História Cultural, na acepção de Roger Chartier. Defende-se que, no tratamento historiográfico desses impressos, materialidades e textualidades são dimensões interdependentes na produção de sentidos. Disso resulta a necessidade de uso de protocolos específicos, conforme objetivos e problemas de investigação, para registro de características materiais, textuais e gráficas do impresso periódico em seu suporte original. Tal prática facilita a consulta, a interpretação e a análise ulteriores das edições investigadas, mesmo sem sua presença física.

Palavras-chave: Fontes Históricas. Imprensa periódica. Roger Chartier.

Resumen

Este artículo presenta procedimientos técnico-operativos para la recopilación de publicaciones periódicas y su reproducción digital en bases de datos, considerando la referencia de la Nueva Historia Cultural, según Roger Chartier. Se argumenta que la relación fuente x objeto, en el tratamiento historiográfico de estos impresos, no se ve de manera dicotómica, ya que materialidades y textualidades son dimensiones interdependientes en la producción de significados. Esto deriva en la necesidad de utilizar protocolos específicos, de acuerdo con los objetivos y problemas de la investigación, para registrar las características materiales, textuales y gráficas de la publicación periódica impresa en su soporte original. Tal práctica facilita la posterior consulta, interpretación y análisis de las ediciones investigadas, incluso sin su presencia física.

Palabras clave: Fuentes históricas. Prensa Periódica. Roger Chartier.

Against representation, [...] according to which the text exists in itself, separated from all materiality, it is necessary to remember that there is no text outside the support that allows it to be read (or heard) [...] (Chartier, 1991, p. 182).

Introduction

The periodical press, understood by this term as the editorial genre represented, above all, by printed journals (Luca, 2014), has become a privileged source for studies and research on the History of Education in its various aspects, including the practices, appropriations and representations experienced and/or promoted by the various agents and educational institutions. Nevertheless, as explained by Luca (2014), the use of the press as a source of research only started to become significant in Brazil, not without some reluctance, after the 1970s, in the context of an experienced renovation, internationally, through the historiographic field (Le Goff, 1990; Pesavento, 2003). In the fields of the History of Education, it can be said that the interest in the periodical press for carrying out studies and research with a historiographical character on Brazilian education was even more recent, since it refers to the end of the 1980s, being intensified from the following decade onwards (Catani, 1996), when this production became more expressive in the academic environment (Cf. Biccás, 2008; Campos, 2012; Castro, Borges & Castellanos, 2020; Catani, 1996, 2003; Catani & Bastos, 2002; Catani & Faria Filho, 2002; Martinez, 2009; Pinto, 2008, 2013, 2017; Rodrigues & Biccás, 2015; Silva, 2012; Zanlorenzi, 2010; Zanlorenzi & Nascimento, 2020, among many others).

Until the end of the 1980s, Catani (1996) affirms that “access to sources that discussed or operated analyzes on teaching magazines was still very restricted” (p. 120), although there were already “the assumption, often corroborated from then on, that the specialized periodical press constitutes a privileged instance for the understanding and functioning of the educational field” (Catani, 1996, p. 120). In Martinez’s words (2009): “Based on the reading of Lopes and Galvão (2001)², the use of newspapers and journals as a source in historiographic research had its prestige validated longer in the preference of history researchers” (p. 23-24, emphasis added). However, as the same author continues: “In the case of the History of Education, many have been dedicated, since the 1990s, to the study of printed material circulating along with the school public. The work with the Pedagogical Press, whether as a source or object of study, has become increasingly frequent” (Martinez, 2009, p. 24), with the design of methodologies, techniques and theoretical approaches for this work.

From the above, it is understood that a consensus has already been established among historians and historians of education about the relevance and pertinence of printed periodicals for historical research. Increasingly, education and teaching journals, in particular, have been scrutinized in Doctoral dissertations and Master’s theses that make up the accumulation of knowledge in our historiography of education. However, there has been, in recent years, a discussion about how these printed materials should be approached and treated by researchers, that is, if only as a source or as a source and object. The theoretical-epistemological innovations

² The author refers to this work: Lopes, E. M. T., & Galvão, A. M. de O. (2001). *História da Educação*. Rio de Janeiro: DP&A.

of the New Cultural History, disseminated in Brazil especially from the work of the French historian Roger Chartier, “has been impacting and marking contemporary historiographical production and in particular the history of education” (Biccas, 2008, p. 27), in the sense of presenting indications and possibilities on how to approach printed periodicals in historiographic studies.

It was precisely in this perspective of work, arising from the New Cultural History, that I developed my Doctoral dissertation in Education, linked to the line of research History of Education, Memory and Society, of the *stricto sensu* graduate program in Education at the Federal University of Grande Dourados (UFGD), when studying representations and strategies of the *Apaenos*³ about the education of the exceptional⁴, as disseminated, from 1963 to 1973, in and by the printed periodical *Mensagem da Apae* (Bezerra, 2017). Before producing the Doctoral dissertation and to make it possible, I described an itinerary for locating, collecting, organizing, archiving and systematizing the various editions of this printed material and its copies, which were produced by me with the view of developing the final research report. Socializing the way in which I undertook such an itinerary, in order to collaborate with researchers in the field of History of Education, especially those who are new and who have the intention of handling sources from the periodical press in the light of the mentioned perspective, especially in the case of printed journals, which is, therefore, the main objective of this text. As an initial warning, however, I emphasize that this is not a matter of showing an archival work or any claim to it.

Rather, the intention is to present to researchers who are new or unfamiliar with the universe of periodical press and historical-documentary collection possibilities to start the compilation, storage, manipulation and analysis of copies of these printed materials, especially in contexts with scarce financial resources, absence of services and or specialized knowledge in computer science and digital handling, Archival science or archives already duly constituted with their collections catalogued and made available for consultation by scholars. In the case of the History of Education, in which researchers have begun to gather collections and series of magazines from the pedagogical press, often constituted from scattered copies, found at random, not systematically stored in school/educational institutions or through donations and loans obtained from different social actors, without specialized cataloging, these same researchers, also minority graduated historians in the Brazilian case, have been compelled to build their own collections, instruments and databases, in order to organize the collection and analysis of this material based on their references. Furthermore, this task does not always seem so evident to Master’s and Doctoral students in Education who start in this field and need to incorporate conceptions and practices in educational historiography, at the same time that they are challenged to locate their own sources. Thus, I do not bring discussions about the elaboration of a historical archive itself, but I share a script, produced from a certain theoretical place, based on my research needs, considering that: “Every methodological reflection takes root, in effect, in a particular historical practice, in a specific workspace” (Chartier, 1991, p. 178). This was my work, and I hope that, in some way, it can bring contributions to the researchers of periodical press in History of Education, giving rise to new theoretical and methodological reflections.

³ *Apaenos* are members of the Association of Parents and Friends of the Exceptional (*Associação de Pais e Amigos dos Excepcionais* - APAE), a specialized institution, of a private-philanthropic nature, which emerged in 1954 in the city of Rio de Janeiro, and, since then, has expanded throughout Brazil, focusing on education, specialized social assistance and health for people with intellectual and multiple disabilities, according to the current nomenclature (Bezerra, 2017).

⁴ The term exceptional is currently out of use; however, historically, it has been used to designate subjects with disabilities and even giftedness. However, its use by APAE, which, as a specialized institution, directed their practices basically to subjects today designated as those with intellectual disabilities, ended up associating the word exceptional, in the sphere of social representations, with this particular disability.

1 The periodical press as a *source object*?

To begin with, with regard to the reflections that underpinned the itinerary of my research, it is necessary to emphasize that Chartier himself has not spoken about periodicals in a specific and declared way. Nevertheless, the author's recurrence to themes concerning graphic culture and its historicity (Chartier, 1990, 2002a, 2007, 2014), in order to attribute "to each society the set of written objects and the practices that produce them or employ" (Chartier, 2007, p. 10), with a view "to understand the differences between the different forms of writing, contemporary with each other, and to catalogue the plurality of uses in which it is invested" (Chartier, 2007, p. 10), it has proficiently grounded studies about periodicals, as well as other written objects of school culture, such as notebooks, books, diaries, textbooks, among others. Even not directly addressing work in journals and newspapers, as it focuses mainly on the history of the book, reading and editing (Chartier, 1990, 1991, 2002a, 2002b, 2007, 2014), the analyzes of this historian, expanded to "all objects that contain the communication of writing" (Chartier, 1991, p. 178), have enabled conceptual and methodological mediations for the advancement and qualification of research with such a focus (Bezerra. 2017; Biccás, 2008).

One of its most significant theoretical-methodological assumptions, from which historical research has benefited from the use of periodicals, is precisely the **simultaneous consideration** of these as **source** and **graphic object**, that is, as cultural products endowed with their own textuality and materiality. In this sense, resuming here the considerations of McKenzie (1986), the historian can no longer be attached to the "uniquely semantic definitions of the texts [...]" (Chartier, 2002b, p. 244), that is to say, it cannot be merely satisfied with the written contents of the printed material, abstracted from any supports and dissociated from the very conditions of its production, circulation and reception. Documentary criticism, when restricted to literalness, to the argumentative path of written language, is insufficient for the analytical treatment of graphic culture objects, as it leaves aside "the symbolic value of signs and materialities" (Chartier, 2002b, p. 244). It follows that, in this aspect, it is not an option for the researcher to analyze the periodical printed matter as a source devoid of materiality, that is, outside its own condition of cultural object - and this is not necessarily to say that such printed matter be, in itself, the very investigative object of the research. Rather, it is about considering that the periodical print, in its ontological status, is always an object that can be seen and read, in its material and graphic performance.

Even if it is said that the research is about a certain theme, explored in and/or from a journal - and not about the printed matter itself -, there is no way to take the content written by itself, "separated from any particular physical form and reduced to its only verbal structure" (Chartier, 2002b, p. 249). This content only becomes intelligible to the extent that its belonging to a specific type of support is understood, which imposes restrictions and conditions on the writing itself and everything else graphically conveyed. In other words: "Both the imposition and the appropriation of the meaning of a text, therefore, depend on material forms whose modalities and ordinances, considered for a long time to be insignificant, delimit the desired or possible understandings" (Chartier, 2002b, p. 244). Therefore, in the questioning process of periodicals, separations or dichotomies between textuality and materiality - when present in the light of studies that are self-linked to Chartier's conception - result more from a misunderstanding of the propositions and notions employed by this author than from a choice relevant methodology.

As the French historian himself asserts, this "undoubtedly stems from a false quarrel or an ill-posed question. Indeed, a work is always read or heard in one of its particular states" (Chartier, 2007, p. 15-16). Consequently, Chartier invites us to carry out a documentary criticism, "which constitutes the most lasting and least contested of the characteristics of history" (Chartier, 2002b, p. 240), capable not only of interrogating the source for its immediate

content, but also for its form, since the interchange between these dimensions is what shapes the mediated meanings of the document, indispensable for historical understanding. In these terms, the historian is not one who merely makes a content analysis of written texts - a procedure already carried out and standardized by other research approaches - but he is also a student of the content conveyed in and by the graphic-material forms that, at each moment make up these texts and ensure their intelligibility. Therefore, it is about “not dissociating the analysis of symbolic meanings from that of the material forms that transmit them” (Chartier, 2007, p. 10). Depending on McKenzie’s (1986) thinking, there is always the warning that “against the tyranny of strictly linguistic approaches, (...) the determinations underway in the process of making sense are plural” (Chartier, 2002b, p. 13). In this sense, it is necessary to undertake an epistemological turn, made possible by the achievements of the New Cultural History, rejecting “the division that separated, for a long time, the sciences of interpretation and description, hermeneutics and morphology” (Chartier, 2007, p. 10). In other words, it is essential “[...] never to separate the historical understanding of the writings from a morphological description of the objects that contain them” (Chartier, 2014, p. 20).

This does not mean that the researcher should get lost in detailed and picturesque descriptions of a printed material, but the challenge is precisely the thesis that, in order to “read” this type of source, in view of its ontological definition, it is essential to understand its materiality, which can even occur at different levels and cuts, according to the possibilities of access to the journal’s originals, the objectives of historical research and the questions posed to the investigation. Thus, when the necessary attention to the materiality of printed material is evident, it is not advocated “a strictly morphological analysis of objects” (Chartier, 2002a, p. 64) all the time and in isolation; rather, it's about realizing:

a question about the expressive function of non-verbal elements that intervene not only in the organization of the manuscript, or in the arrangement of the printed text, but also in the theatrical representation, in the recitation, in reading aloud, etc. - what D. F. MacKenzie (1986) designates as “*the relation of form to meaning*” (Chartier, 2002a, p. 64).

To exemplify the above, knowing the name and the exact weight of the paper may not be relevant in a research on the education of children in an institution, as published by a journal at a given time, but, certainly, to scrutinize the graphic mediations registered in this support, like the highlights, the colors used or not, the arrangement of the photographs, if any, in short, the entire layout of the pages, is an indispensable procedure. After all, such elements communicate various information that transcend the written text, complement it or even oppose it, demanding an accurate look from the researcher for such relationships. If the intention is to understand the life cycle of this form and its insertion strategies in a certain field of activities, knowing about the type of paper used, to continue with the example mentioned, can be essential to understanding the (dis)credit of this journal in relation to its competitors, its projection in the publishing market, its technical investments, which can demarcate phases of its existence, and the impacts of this on the published contents. In both cases, however, the simultaneous consideration of print as a source and peculiar object of graphic culture, in the development of the methodological path and the resulting interpretative analyzes, is *a sine qua non* condition for the success of historical research. This is because:

Attentive to the sense of the forms, the historical procedure can approach the canonical texts [and any others] that intimidated it for a long time and propose an interpretation that respects the historicity of its production and its appropriation. At a time when reflecting the

omnipotence of formalistic approaches, structuralist or not, *such a program carries the promise of an unprecedented, denser and more complex understanding of works and practices* (Chartier, 2002b, p. 202, emphasis added).

Therefore, it is up to the historian of education to understand that, in the domains of the New Cultural History, we are facing a new requirement for historiographic work with periodical press, given the specific characteristics of these objects and “renewed attention to the texts” (Chartier, 2002b, p. 13). In this sense,

For a long time relegated to the ancillary position of auxiliary sciences, these technical knowledges, which propose rigorous and formalized descriptions of objects and forms, become (or become again) essential, since *documents are no longer considered only by the information they provide, but they are also studied in themselves, in their discursive and material organization*, their conditions of production, their strategic uses (Chartier, 2002b, p. 13, emphasis added).

In other words, this is what it means to scan the printed document, especially the periodicals, as material sources, in order to “[...] always associate in the same analysis the roles assigned to writing, to the forms and supports of writing and to the modes of reading” (Chartier, 2014, p. 21, emphasis added). This means that the description and interpretation can never be dissociated, but they are two procedures that are mutually implicated in the historiographic operation (Certeau, 2002) with such objects of graphic culture. Consequently, in order to problematize the periodical press, it is necessary to start from the assumption that the concept of text, as well as that of a document, becomes expanded, performative and relational. As Chartier (2002b, p. 244, emphasis added) best explains, inspired by McKenzie’s (1986) studies,

This expansion leads, in return, to a new way of considering written texts. (...). A text (here in the classic definition) is always inscribed in a materiality: that of the written object that bears it, that of the voice that reads or recites it, that of the representation that makes it listen. *Each of these forms is organized according to its own structures that play an essential role in the process of producing meaning*. In order to remain in printed writing, the format of the book [and, by analogy, it can also be said of periodical press], *the layout of the pagination, the ways in which the text is cut out, the typographic conventions are invested with an “expressive function” and support the construction of meaning*. (Chartier, 2002b, p. 244).

Thus, when choosing a periodical press for study, particularly journals, the researcher committed to the New Cultural History framework needs, then, to begin his/her analysis by asking him/herself not only about the theme and the problem that moves him/her to take this periodical as a source of historical information or as a “dematerialized” text, but to inquire about the same morphology that defines or marks a periodical press, which editorial conventions distinguish it from other forms and how this theme and problem are presented and represented by the dynamics of the forms and of the (con)texts of the periodical(s) under analysis, in their *discursive and material organization*. One cannot lose sight of the fact that a printed material, whatever it may be, as a cultural object, establishes a physical space, a temporality, cadence and codes specific to its deciphering, which presupposes a minimal understanding of how this

which, henceforth, I call a *source-object* is constituted, placing it at the intersection of *synchronous and diachronic temporal relations*.

For this reason, at the moment of locating the material in the various possible collections and organizing it in a personal database for the development of historical research with this *source-object*, the researcher needs to surround him/herself with this epistemological understanding and technical care that will not only facilitate his/her interpretative work but, in fact, will make it feasible in the aspect presented, even if not, at all times, with the copies at hand. In addition, if this initial stage follows certain protocols, he/she will have information to answer, eventually, some research objectives that are added during the qualification of the research and new questions that are asked. This is what I discuss in the next item, sharing my research experience.

2 The methodological process of handling printed material as a source-object

Once the implications of Chartier's understanding of the objects of graphic culture, including the periodical press, are explained, I can then describe the itinerary of my research, in order to present to researchers who are interested, especially those beginners, how I organized it since the beginning, the methodological process of handling the periodical *Mensagem da Apae* to ensure its analysis as a source and object in the thesis (in this case, in particular, both as a material and investigative object). Such concern is justified because, when searching journals, we will not always have printed copies at our fingertips at all times. These can be in collections of private or public institutions, belong to collectors or to certain people who, for different reasons, kept them. In this sense, it is very likely that this material will be made available to us only for temporary borrowing, with which we must be careful in the use, handling and conservation during the entire period in which it was given to us, or while it was allowed to be supervised consultation *in locus*.

It is possible that some people, when recognizing our academic interest in some "old" journals in their possession, they even present us with them, which, however, is not always expected and, also, must be carefully evaluated and documented, since the person may have a great affectionate bond with these objects, as their places of memory; or, yet, it may not be the only one authorized to decide on a possible donation, as in the case of people linked to institutions, and all those involved must formally agree. These ethical considerations must not be ignored by the researcher and, if provided the possession of these journals, it is opportune that the material is then made available, physically, in some public collection and/or in open access online repositories, so that other scholars are aware of such documents and their preservation as a patrimony of graphic culture.

That being said, any opportunity for contact with the printed material considered in the investigation must be optimized and documented, since multiple pieces of information will be required at the time of writing the research report. As previously established, this contact between the researcher and the support where the texts are inscribed is not something fortuitous or superfluous, but it is the very requirement of the research. In fact, in the words of Chartier (2002b, p. 248, emphasis added): "Consequently, the finding that *the forms affect meaning* should lead to considering *the texts in their original materiality to be normal and necessary*". Based on this assumption, in January 2015, I made a trip from the hinterlands of Mato Grosso do Sul to Brasília-Distrito Federal, in order to visit the headquarters of the *Federação Nacional das Associações de Pais e Amigos dos Excepcionais* (FENAPAES) - National Federation of

Associations of Parents and Friends of the Exceptional, where, after previous contact by e-mails and due authorization, I found out that, in the internal library of that entity, most of the editions of the journal *Mensagem da Apae* were stored, already defined as my object of study, for the reasons explained in my Doctoral dissertation (Bezerra, 2017).

Certainly, I would not be able to bring copies of the journal with me, nor would I have to return to the site again to consult them again, and I needed, somehow, to guarantee ways to reproduce them and store them for analysis in the thesis, in moments after the documentary collection phase, recording impressions, data and information obtained only in the empirical circumstance. In the process, I spent two weeks visiting the institution every day, morning and afternoon, which gave me free access to the library, during office hours, so that I had this contact with the journals stored there. They were kept on open steel shelves, grouped in small blocks, with a certain temporal organization, such as, for example, journals from the 1970s in the same block. This, however, was not always confirmed during assemblage, because, in these blocks, there could be other printed materials and journals from other periods mixed together. However, given the modest dimensions of the collection, these circumstances, by themselves, did not significantly impact as an obstacle to the stage of documentary collection.

As the collection was not organized according to very exact or technical criteria, I initially tried to locate, separate and identify all the available copies of the journal *Mensagem da Apae*, making their inventory, taking care to maintain the initial arrangement, as found in the library space. Finally, excluding repetitions, I found 115 copies of the journal, each representing a different edition of the periodical, from 1963 to 2014, as disclosed in the appendix of my Doctoral dissertation (Bezerra, 2017). This temporality, at that time, covered the origin of the “last” edition of the printed material, whose editorial activities until today have not been ended, even though they were migrated to the online format in 2015. As my time frame of study was not yet precisely defined and the notion of set proved to be fundamental to understand, diachronically, the material characteristics of the printed material, I chose to work, in the collection, with records of this entire collection. This strategy was decisive, then, for me to justify, based on the variations of the *source-object* itself, the delimitation of one of the phases of the journal *Mensagem da Apae* as the focus of analysis, operating with a more restricted documentary series, composed of the editions from 1963 to 1973 (Bezerra, 2017).

Once the copies were compiled, it was necessary to guarantee a form of registration. At first, I had planned to make only written notes and photographic copies of the journals, which proved to be an enormous job, since it would be necessary to photograph all the pages of the printed material. This would take a long time and, later, would make it difficult to handle this data, generating many separate image files. Photographing journal pages, even though it is an important technique for certain research objectives, may not always be a reasonable option for researchers without assistants, with little time or with little skill in this task. Among the possible objections, there is the requirement to control the brightness, since some papers used in printing can be shiny, creating reflections and shadows in the captured image, or they can be slightly opaque, creating confusion between what is printed on the front and back of the sheet⁵; as well attention is needed in focus, size and resolution of the images obtained, plus the process of identifying and grouping them into virtual folders. Therefore, there may be, especially in the first moments, the need to redo the same photo several times, and not always with guarantees

⁵ Sheet is a unit composed of two printable sides, called front and back. Page is each side of a sheet that has received printing. By definition, a sheet contains two pages.

of good results. Certainly, such attempts consume valuable time for the researcher, especially when financing his/her own research and acts alone.

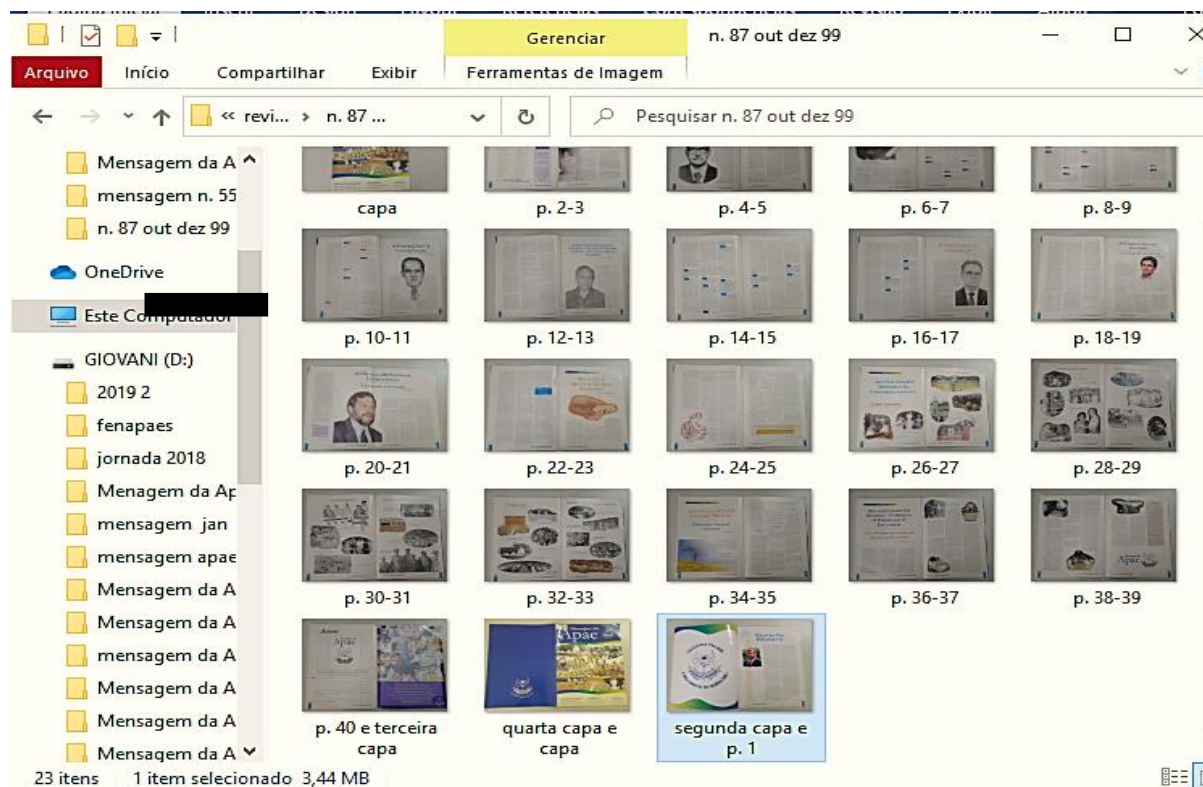
Through these attempts, I was also able to understand that photographing the journal open, showing two pages at a time, is an important strategy to save time and, in addition, to capture it, later, at the time of analysis, especially if the researcher does not have physical possession of the printed material anymore, the graphic-textual sequence proposed to the reader, with its editorial mediations and its effects of meaning. In this way, the dialogue between the forms, images, resources and typographic interventions adopted, the written text and its contents can be better visualized, in short, the *mise en page* that makes the printed work as such, with its reading protocols. This combination of elements always creates a discourse that cannot be ignored. However, I need to highlight the fact that this same strategy can compromise the resolution of the photograph, making it difficult to read the written content later, depending on the actual size of the photographed pages, the elements on the page, the target frame and the quality of the camera, as all of this can impact the focus and range of the equipment. For this reason, if there are no other possibilities, the ideal is to photograph the printed material in open form, but also, for a better reading later, it is essential to register each page individually, or at least those that are not very clear. This material must be compiled in virtual folders properly designated according to each edition of the journal (*Figure 1*). Internally, the photo files must be identified by the numbers of the original pages they represent or, otherwise, of the photographed parts, such as covers and inserts, for example (*Figure 2*).

Figure 1 - Virtual folders with their respective identifications for storing the photographed editions of the journal

Nome	Data de modificação	Tipo	Tamanho
Mensagem da Apae nº 32	11/09/2020 15:41	Pasta de arquivos	
Mensagem da Apae nº 32 ok	11/09/2020 15:41	Pasta de arquivos	
Mensagem da Apae nº 32 rever	11/09/2020 15:41	Pasta de arquivos	
Mensagem da Apae nº 33	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 34	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 35	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 37	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 38	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 39	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 40 ok	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 40 rever	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 41	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 49 ok	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 52	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 90	11/09/2020 15:42	Pasta de arquivos	
Mensagem Da Apae nº 91	11/09/2020 15:42	Pasta de arquivos	
Mensagem da Apae nº 93	11/09/2020 15:42	Pasta de arquivos	
mensagem do Apae nº 92	11/09/2020 15:42	Pasta de arquivos	
mensagem jan março 1964	11/09/2020 15:42	Pasta de arquivos	
mensagem jan. dez 1966	11/09/2020 15:42	Pasta de arquivos	
mensagem n. 6	11/09/2020 15:42	Pasta de arquivos	

Source: Author's virtual database.

Figure 2 - Virtual folder open, containing a photographed edition of the journal, on open pages, with identification of the internal files according to the type of parts and the pages of the original



Source: Author's virtual database.

The circumstances, however, ended up in my favor, so that, in my case, the photographs ended up becoming complementary to the documentary collection process. As the headquarters of the *FENAPAES* was located in a complex of commercial buildings, there were, on the spot, photocopying shops offering scanning services, which allowed for speed in obtaining copies of the magazines. In this way, I was able to invest in the digitization, in Portable Document Format (PDF) files, of all this material, immediately stored on pen-drives and, for security, also on online drives, because the loss or any violation of the physical media can compromise the entire progress of a research, which the researcher must pay attention to from the beginning of its collection. I must point out that this was only possible because the institution generously allowed me to remove a number of copies from the library each time and take them to the copy machine of the same building, returning them until the end of the day, under an institutional conference. Otherwise, it is very likely that photographing each journal, in its entirety, would be the best possible alternative, although it takes longer. Therefore, this attitude represented an essential collaboration of the entity in my research process, because, while some journals were digitized, I dedicated myself to organizing information about the others that remained in the library enclosure, peering into their “original materiality”⁶, without any time wasted.

For that, I organized an editable file on my laptop called “Technical data from the journal *Mensagem da Apae* found in *FENAPAES*”. Thus, I started to structure, already at the site of the collection, a virtual data bank, which, later, was very useful in the analysis of the material, including to understand variations of its periodicity, its graphic characteristics,

⁶ The archives with the digitized magazines were transferred to the *FENAPAES*, as it was already in its interest to also organize an online database with the editions of the journal *Mensagem da Apae*, in order to preserve the history and memory of the *APAE* movement and the publication itself. Currently, this digital collection is available at: <http://200.134.28.16:8080/jspui/handle/123456789/1>, which can be freely accessed by any interested party.

suggested reading protocols, editorial mediations employed, technical conditions of production, as well as, from this same data, demarcate phases and/or moments of each phase of the printed material, in the intrinsic relationship between forms, materials and contents. In this process, each copy located was then submitted to a protocol⁷, the model of which is self-explanatory in the following examples, taken from the database I composed:

Technical data of the journal *Mensagem da Apae*

Location: FENAPAES/Brasília – Distrito Federal.

Year II, n. 1, period: January to March 1964

Cover: in black, white and blue, containing an illustration with the symbol of the *Mensagem da Apae*. The structure is characteristic of a journal, with a clear distinction between the cover and the fourth cover.

Second, third and fourth covers in black and white. On the fourth cover, only the indication of the publisher - Ave Maria - from São Paulo.

Core: All in black and white, with only one black and white photograph too, that of J. F. Kennedy. All sheets are used on the front and back. Inner pages: paper of consistent weight, hard, thicker than the A4, facilitating the handling. It is aged and yellowed.

Cover and fourth cover: thinner and more flexible paper than the one in the core.

Binding: stapled (spine)

Dimensions: 16.4 x 23.3 cm

Conservation status: Satisfactory, but with the risk of unravelling the binding.

Inserts for subscription order: No

Number of sheets (including covers): 16

Technical data of the journal *Mensagem da Apae*

Location: FENAPAES/Brasília – Distrito Federal.

Year IV, n. (1 to 4 in the same edition), period: Jan. – Dec. 1966 (only edition of the year).

Cover: in black, white and gray-blue

Second cover: in black and white (advertising)

Third cover black and white (*APAE* congress discoure).

Fourth cover: black and white (advertising).

Core: black and white, with black and white photos. All sheets are used on the front and back. Inner pages: thin, flexible paper, but not smooth or silky to the point where pages cannot be easily turned. Paper is aged and yellowed and can be easily torn.

Cover and fourth cover: paper slightly thicker than the core, of better quality, but flexible. It is not cardboard.

Binding: stapled (spine)

Dimensions: 15.9 x 23 cm.

Condition: Good

Inserts for subscription order: No

Number of sheets (including covers): 18

Technical data of the journal *Mensagem da Apae*

Location: FENAPAES/Brasília – Distrito Federal.

Year 1, n. 1, period: November 1974

Cover: black, white and red

Second cover: blue and white

Third and fourth layers: black and white

Cover and fourth cover: thicker paper (cardboard)

Core: black and white. All sheets are used on the front and back.

Inner pages: thicker and harder paper than A4 sheet, but thinner than the cover and fourth cover. Easy handling. In this edition, the paper appears brighter on the inside pages.

Binding: stapled and glued pages, with the binding making a square spine.

Dimensions: 21 x 28.1cm

Conservation status: bad and at risk of deterioration (the binding has broken, because the pages are loose internally, putting at risk the preservation of the 1974 edition).

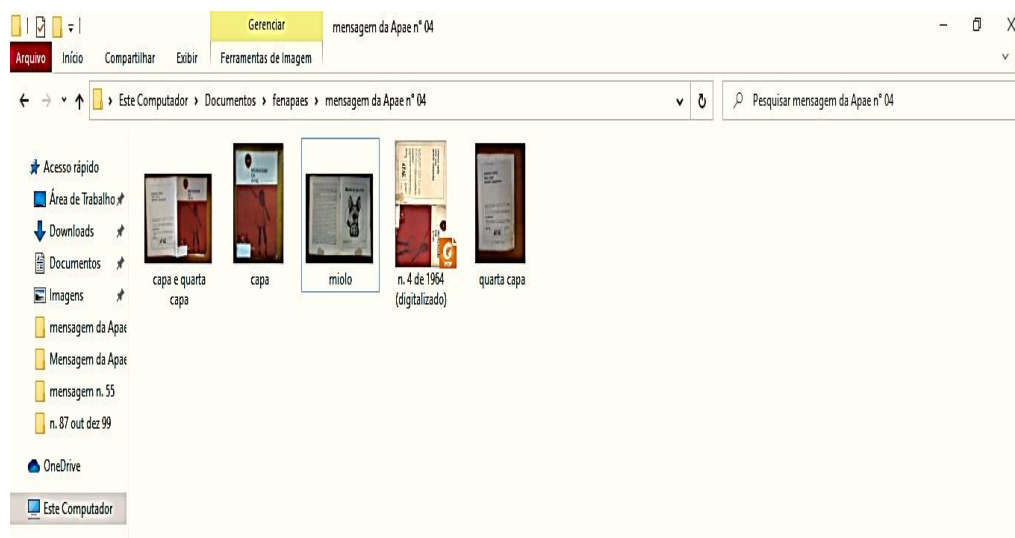
Inserts for subscription order: No
Number of sheets (including covers): 41

⁷ In the case of preparing these technical sheets for the summary identification of the specimens found, I was concerned, above all, with aspects of materiality, which could not be retrieved later, once empirical contact with the sources had ceased. Therefore, I did not indicate data on editorial team, circulation, content, among others that could later be identified by the information provided by the written text.

This protocol, which can be improved and applied by other researchers in the document collection phase, ensured that, even in the physical absence of the copies, after my return from the institution, I had technical elements to perceive changes and permanence in the editing and presentation modes of the printed document, including its material and graphic discourse. In addition, its use always ensures the identification of the place where the researcher found certain copies, minimally clarifying about its state of conservation, which is important information for other researchers interested in the location of the same printed material, as well as for the preparation of the research report, as it is essential to make explicit the meeting places, the conditions of storage and the techniques for handling the sources, as part of the historiographic operation (Certeau, 2002). Therefore, it is not enough to merely digitize the printed material, since this technique alone does not guarantee the necessary data set for the intended analysis. After all, “The establishment of sources also requires today a founding gesture, represented, as yesterday, by the combination of a place, an apparatus and techniques” (Certeau, 2002, p. 82). In other words, such data do not speak for themselves, but they certainly need to be the object of historiographical problematization, based on their own objectives, the problem and the references of the research actually conducted.

Thus, as a way of illustrating and complementing the data of these technical files and of the scanned PDF copies, I also established a protocol to partially photograph the editions, the following elements being photographed in this order: cover, cover and fourth cover (with the journal open to highlight the binding), core, fourth cover⁸. It is worth remembering that digitalization tends to reduce the perception of physical, identity and organizational characteristics of the printed material, given the consequences of changing support and means of registration. For this reason, photography helps to compensate for some of these losses, even though it has its own limitations. In case there is, for example, information on the square spine of a magazine, digitization, in general, will not preserve it, but a photograph of the open printed material, showing its cover and fourth cover will be very useful for the recovery of such content. All of these complementary image files were inserted in the same virtual folders identified by the corresponding edition of the journal (*Figure 3*).

Figure 3 - Virtual folder for storing one of the printed editions, containing a digitized version in PDF and complementary photographs of the covers and core



Source: Author's virtual database.

⁸ According to the understanding of the Brazilian Association of Technical Standards (*Associação Brasileira de Normas Técnicas - ABNT*), in its Brazilian Standard NBR 6029, the cover is defined as “External coating, made of flexible material (brochure) or rigid (cartoned or bound). The first and fourth covers are the external faces of the publication. The second and third layers are the inner faces or back of the first and fourth layers, respectively” (ABNT, 2006, p. 2).

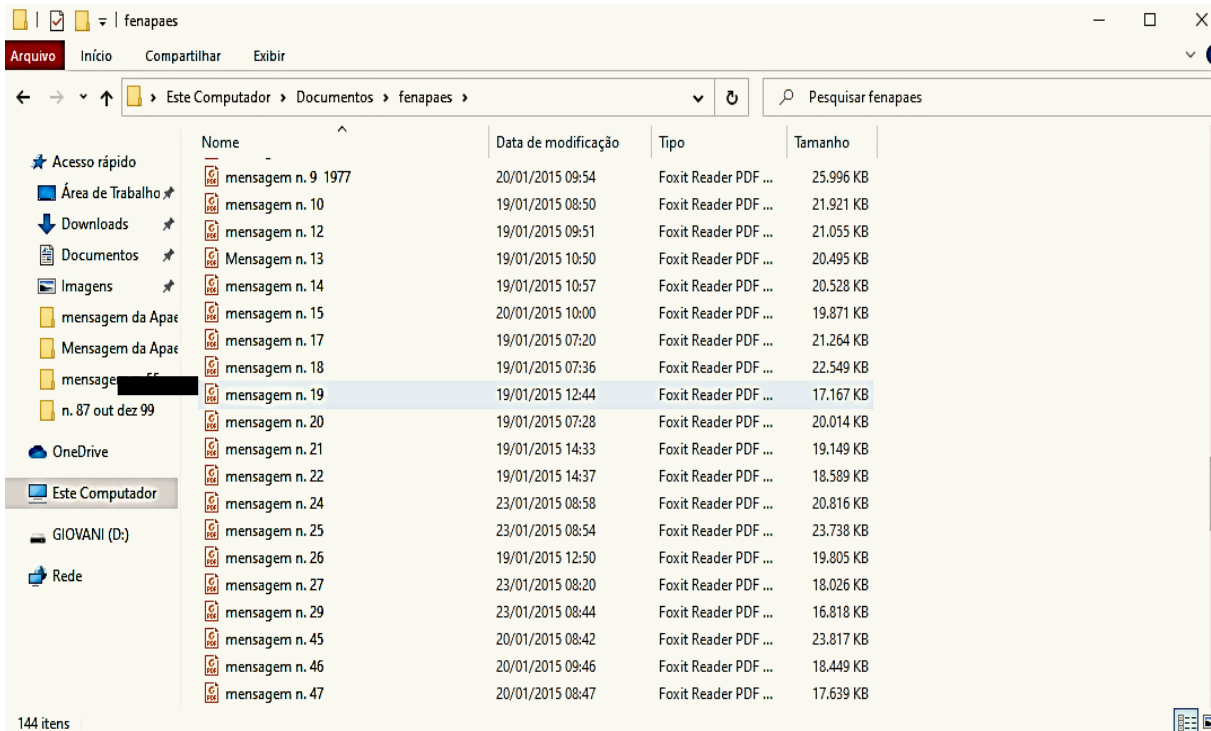
It is worth mentioning here that the emphasis given to the covers, photographed in an additional way, was not random. Rather, the emphasis on covers is a basic dimension in working with periodicals, because: “The image of a magazine cover can be considered a reading protocol and, as such, has the communicative purpose of suggesting to the reader a way of reading and producing a meaning of the text” (Fraga, 2013, p. 74). As we know, the cover and the fourth cover are the most external and immediately visible parts of a periodical, establishing codes for deciphering the print, editorial investments, thematic messages, advertising support, reports, institutional or identity links and indications of the conditions of material production of the graphic culture of a given time. According to Fraga (2013, p. 73),

In the world of printed material, specific features are created and the cover is one of them. It becomes essential in the magazine genre, providing it with a profile and a distinctive brand, mainly to differentiate itself from the newspaper. A cover can be composed of verbal and non-verbal linguistic elements, which make up its layout, such as images, colors in the background, format and colors of the letters, quality of the paper.

In the case of the core, the photograph functioned as a sample of the graphic resources used in the composition of the printed material, including with regard to the ways of presenting the contents, advertisements (when available) and the forms of binding the support. It must not be forgotten that newsletters and magazines tend to be opened in the middle, where the clips jump out and, therefore, editors can prioritize that part of the core to present a certain content or advertising. In these terms, I prioritized the pages of the exact middle of the print for the photographic record. This procedure allowed me to have a collection of images, to be mobilized at the time of the analysis of the *source-object*, because, for a better resolution, working with images obtained from photography than just a digitization arranged in PDF. This is because the image file, for beginners, can be handled more quickly and easily in more accessible and well-known programs that, if necessary, improve its sharpness, enlarge details, allow specific cutouts and guarantee better reproduction conditions, such as, for example, in the case of insertion of figures in a Doctoral dissertation. Without such an image bank, the researcher will need to work, at least, with screen prints of the scanned PDF file to obtain an image, which will already be the reproduction of the reproduction, making the quality increasingly bad and blurred, even with later editions to adjust it.

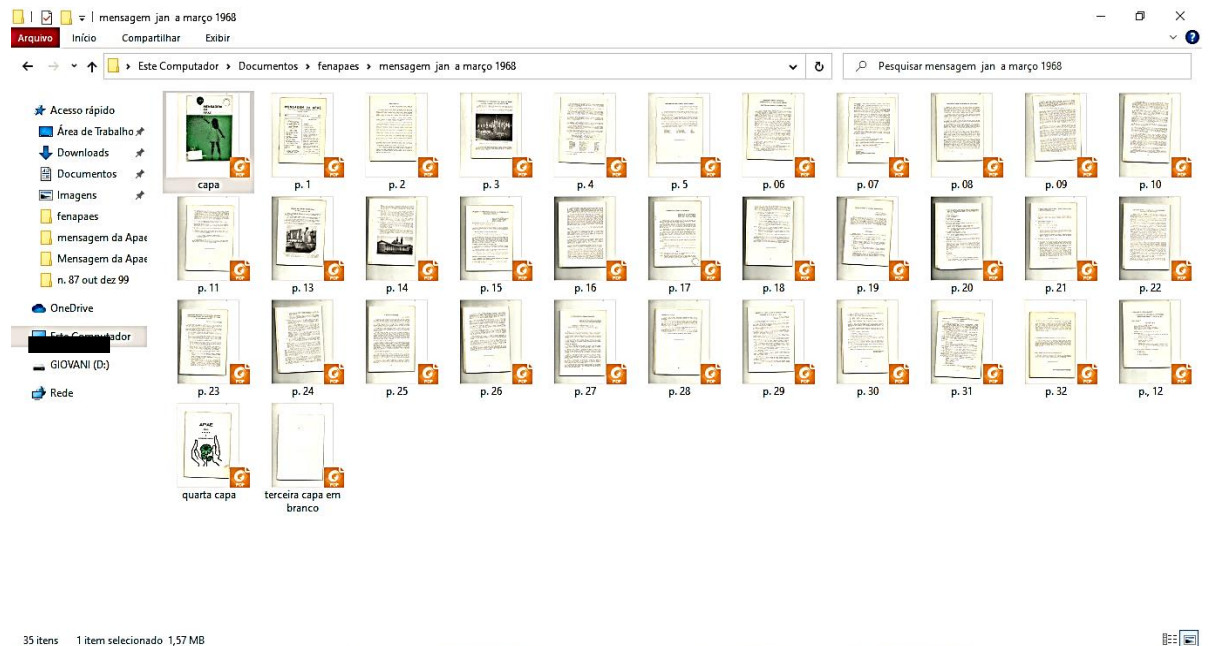
Finally, it should be noted that digitization in PDF format also has its advantages and disadvantages, with the addition of other technical procedures, such as photography, being just as important. Such format does not allow, for example, the ease of editing and quality adjustments allowed by image files, resources that may be necessary for researchers to better understand some details, texts or techniques of the print. However, PDF files ensure better clarity and ease of reading written texts. In addition, digitization, if performed in the form of continuous scanning, allows the researcher to have the entire journal in a single file, properly named, facilitating organization in virtual databases (*Figure 4*). Preferably, the journal should be scanned open, for the same reasons already listed with respect to the photograph of the open pages. Therefore, it is not recommended to scan page by page, unless this is absolutely indispensable due to the size of the printed sheet and the capacity of the scanning machines, the preservation of the material, among other impediments. If the scan is for an individual page, the time for this activity is longer and it will be necessary to organize a specific folder, with each file named by the corresponding page number or by the part name of the original copy (*Figure 5*).

Figure 4 - Example of a virtual folder for storing PDF files related to printed editions, reproduced by continuous scanning



Source: Author's virtual database.

Figure 5 - Example of scanning page by page of a copy, with storage, in a virtual folder, of PDF files, identified according to the original pages and parts of the printed material

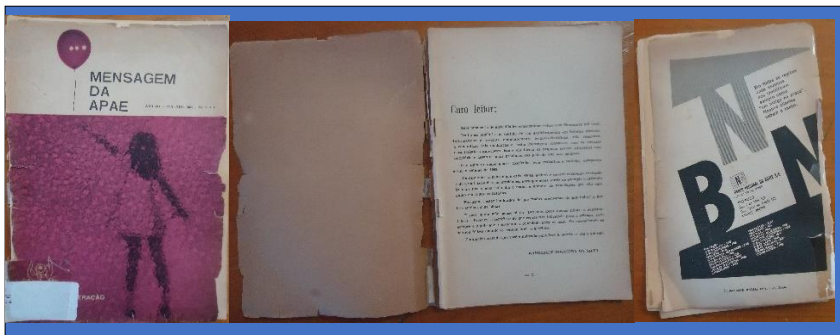


Source: Author's virtual database.

Still in the case of continuous scanning, with the journal pages open, it is essential, before returning the printed material, when not in the final possession, to check it in order to verify that there were no cuts or exclusions, especially when the dimensions of the material go beyond the limits of the device used in scanning, as well as notice if any insert did not hide contents in the digitization process. If this activity is delegated to any company or assistant, checking is essential, as they will not always be concerned with these details, in addition to the risk of “skipped” pages due to distraction or failures of the devices used. In my case, several journals came with pages cut or with their contents covered by the overlapping inserts, in addition to some having been omitted, which made it necessary, for greater speed, to photograph only those pages with problems or skipped unintentionally by the scanner, in order to, afterwards, have such copies available for consultation. If I had not checked the files *in locus*, I could compromise the problematization and analysis of the *source-object* at the time of writing the dissertation. As can be seen, also in these situations, the digitization of the printed PDF is complemented and benefits from the technical resource of photography.

It is also necessary to consider that the scanning process, continuous or not, carried out on certain machines, may exert excessive pressure on the printed material, as well as its repeated handling by an operator. Furthermore, even automated movements of some of this equipment may not be sufficiently delicate. All these circumstances tend to cause or aggravate physical damage to the material, and it is essential to foresee and avoid them in order to safeguard the integrity of the printed material, especially when there are no specialized professionals to carry out the task. Therefore, photography, in these cases, depending on the state of conservation of a journal found, may, again, prove to be one of the most prudent, quick and inexpensive options, although there are the disadvantages already mentioned here, due to their lower degree of intervention and impact on the support. When I located the printed material for my research, I came across some in critical condition (*Figure 6*) and, in no way, would it be pertinent to remove them from the storage location, subject them to scanning machines and to non-specialized operators in handling historical documents. The protocol I organized was, therefore, fundamental for this decision making and for me to understand, later, the ways I followed to digitally reproduce the research *source-objects*, according to their own material conditions. An emblematic case was this, in which the cover was detached from the inside and the binding was at risk, which led to the choice of the photographic record:

Figure 6 - Copies in critical condition, requiring special care in handling and reproduction



Source: *Mensagem da Apae* (year III, n. 1 to 4, Jan.-Dec. 1965). Author's photographic collection.

In addition to the option of photographing the document, handling it carefully in the storage area itself, in order not to further deteriorate the original, there are already devices with sophisticated suspended scanning technology. In this way, books, periodicals or notebooks can be supported on a work table, while the device, without direct contact with the printed material, captures the image and digitizes it, simply by turning the pages, as if it were flipping through

the document, without the use of sudden movements, in addition to the device itself making automatic distortion corrections. Applications downloaded on cell phone devices also perform functions similar to this, through the cameras and flashes of the device, including a sequence scanning feature, which saves time and facilitates the organization of the materials reproduced by the researcher. However, in the case of the suspended digitization scanner, the cost, especially for novice researchers and those without funding, may not be very attractive.

In relation to mobile applications, many have their functions limited in free versions, requiring the payment of licenses to obtain the desired results, more sophisticated devices for their installation and operation, as well as not being available in Portuguese, for example. Despite making automatic corrections and/or allowing adjustments by the user, it is also essential to ensure a good framing of the page to be scanned by the camera of the cell phone and also the control of brightness. Despite these reservations, such applications can be very useful in case the researcher handles fragile printed material that needs care in handling to avoid further wear and tear. Portable handheld scanners, although increasingly used by these mobile phone applications, are also potentially advantageous tools under such circumstances, although they represent an additional cost.

Final considerations

In this paper, based on experiences that I had during the documentary collection stage for the later writing of my Doctoral dissertation in Education, I tried to systematize and present, in particular to novice researchers, methodological and technical-operational procedures for the compilation of printed periodical and the digital reproduction in databases, according to the requirements of historical research, considering the New Cultural History framework, in the sense of Roger Chartier. This work, when well-planned and registered, favors further consultation and analysis of the material, even without its physical presence. However, the researcher will not always need to produce his/her own digital files and databases on the printed material of interest, as these may already be available in repositories, documentation centers and freely accessible virtual domains, organized by archival professionals and historians already engaged in this task.

Even so, as the research with journals, in this strand, assumes that the researcher also has some contact with the printed version of the *source-object*, in order to better interrogate and understand it, I emphasize that, in many situations, **it is important that the researcher, when locating the printed materials, organize his/her own digital collection**, establishing specific protocols which are **consistent with the study objectives**, which is certainly not to be confused with the purposes and the *métier sui generis* of Archivists, whose techniques of document management are ruled by systematic knowledge and for collective use purposes. In addition, as we know, each file, whether online or physical, has its own elaboration and operation rules, which are not always the most pertinent to our study intentions. This is why, as Certeau (2002) warns, “there is no work that does not have to use the known resources in another way and, for example, change the functioning of files defined, until now, by a religious or ‘family’ use” (p. 82).

In the absence of any direct contact with the original materiality of the support, it is essential that the researcher mentions this circumstance in the report, always explaining in which repository, library, archive or digital collection he/she located the “printed periodical” for analysis. Such digital repositories, in turn, should, whenever possible, indicate, in a protocol form, the technical data of these supports, according to the original materiality that generated their virtual reproduction, in order to allow better intelligibility of the *source-object*. After all, even in the absence of this contact, research is not completely banned in the area highlighted here, depending on the objectives and problems proposed for the investigation, or even on the (un)availability of access to the originals.

Even so, it will be up to the researcher to take care to problematize, within the limits and mutations of the *source-object* imposed by the digitization process, the preserved interrelationships between the written content and the graphic dispositions of its presentation, that is, the *mise en page*, trying to identify the conditions of production of this material, in its similarities and differences to others that are contemporary with it. In no way, under such circumstances, should one lose sight of the fact that, from a material object, will start to operate with a virtual object, which interferes in the apprehension of the meanings of the texts, being imperative to recognize that:

Against the trend that aims to replace the communication of original documents with that of photographic and digital substitutes, it is necessary to remember that reading a text in a form that is not its first form is seriously crippling the understanding that the reader can have of it (Chartier, 2002b, p. 248).

There is, so to speak, no ready formula to compensate for “the deformations that inevitably entail any change in support” (Chartier, 2002b, p. 248), as occurs when a printed periodical is scanned and it was not even possible to consult it in its original materiality. Nevertheless, the expanded notion of text, in these cases, becomes an even more important guideline to be observed, as already discussed here, and the researcher must guard against the pitfalls of anachronism. In fact, if there is no surveillance, they will be a constant threat, which can lead to skewed and decontextualized results. As Chartier also warned (2002a),

In the first place, it is against this dematerialization of texts that it is necessary to bring all written production, whatever its genre or status, to the categories of designation and classification according to the time and place that are proper, and at the same time, to the material forms of its inscription and transmission. *Forgetting that double historicity of writing means risking the anachronism that imposes on ancient texts forms and meanings that were totally foreign to them and that disfigures them (...).* (p. 64, emphasis added).

Therefore, in the historiographical approach of periodicals, based on Chartier's assumptions, the problematization of themes, research objects and the achievement of study objectives launched depend on the relationships and links between the writing, the inscription and its material forms. For this very reason, problematizing such objects of graphic culture demands, more and more, in the critical tradition of *Annals*, that, as researchers, we assume as an assumption the operational interdisciplinarity of the historical procedure, without which we may be devoid of notions, concepts, questions and pertinent approaches to mediate our work. This requirement, therefore, is “the one that forces history to engage in a dialogue with other questions - philosophical, sociological, literary, etc. Only through these encounters can the discipline invent new questions and forge more rigorous instruments of understanding” (Chartier, 2002b, p. 18).

That being said, for those who wish to study the printed periodicals, hybrid and inventive paths of the New Cultural History, henceforth in their interfaces with Literature, Semiology, Bibliography, Art, theories of Image, Language and Communication, Information sciences, advertising knowledge, editing processes and graphic design, among others, seem to be a very promising alternative in fulfilling this epistemological appeal. However, it is important to point out that this alternative, although very fruitful, represents a determined reading, which does not exclude possibilities, operations and other approaches to historical research with the various objects of graphic culture in the various domains of History and History of Education.

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