

Rethinking the Archive in Pre-Modern Europe:



Family Archives and their Inventories
from the 15th to the 19th Century

Maria de Lurdes Rosa, Randolph C. Head (eds.)



ALFABETO

*De Pedro de Lugo de Avila
Senhor de esta nobilissima
Caza.*

Do Illustissimo Senor



*Ta boada, do
cartorio.
da casa.*



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The Instituto de Estudos Medievais (Institute for Medieval Studies) at Faculdade de Ciências Sociais e Humanas – Universidade Nova de Lisboa (Faculty of Social and Human Sciences of NOVA University of Lisbon) is supported by the Fundação para a Ciência e a Tecnologia (FCT – Foundation for Science and Technology).

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Jorge Brito e Abreu
Luis de Mendia de Castro
Luís de Vasconcelos e Sousa
Luís Manuel da Costa de Sousa de Macedo
Maria João d’Orey da Câmara; Vasco Maria d’Orey de Figueiredo Cabral da Câmara e seus irmãos.
Maria José Falcão Trigo da Cunha Vilas-Boas e Carlos Maria Falcão Trigo da Cunha
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Preface

Archival practice has in the past two decades finally begun to be recognized as a vital field of research in its own right and not simply an auxiliary discipline providing historians unproblematic access to written sources. Archives are, as Maria João de Câmara Andrade e Sousa writes in her contribution to this volume, themselves sources of power, constructed and reconstructed under specific historical circumstances for specific ends. Aristocratic family archives in particular were accumulated, organized, and transmitted to exercise familial power, to protect against rivals and royal prerogatives, but also to shape memories of families and thus to constitute these very families across time. A particularly significant but too often neglected aspect of archival practice is the preparation of finding guides, cartularies, and inventories which, far from being objective photographs of the contents of a given archive, were powerful tools in the advancement of these ends. When and why such inventories were created; how they select, organize, expand, and shape the contents of the archives that they purport to inventory; their strategies

of inclusion and exclusion; the dynamic tension between the inventory as text and the documents that it references; the influence of broader cultural norms concerning other types of inventories, serial records, and collections; the conceptual and practical relationships between family archival inventories and those the crown and the Church; all of these issues and more are addressed in this pioneering volume on family archives and their inventories. Maria de Lurdes Rosa and Randolph C. Head are to be congratulated for drawing together these essays that bring these broad conceptual questions to focus on aristocratic family archives from Portugal, Germany, and France between the fifteenth and nineteenth centuries. One can only hope that this brief volume will help stimulate further reflection and analysis of archival inventories as an object of historical research.

Patrick J. Geary
Institute for Advanced Study

Studies

чтобы систематически,
ощущение, что это не
книга, а нечто иное
или нужно пройти,
высказываясь скажем а некие
с разбегу пропуском чтобы
испытывать с дороги книга,
увлеченная, что пора ощущение,
дождя там же
добычуе дальше.

Minyograf für Herr
unterzeichneten
Professur, zu Köln im Juli 1863,

Alt. Kiermb, für Hellas

ab unter dem Jahr 1863
Düsseldorf, 1863

Delineating the social complexity of archival practices: the objectives and results of the INVENT.ARQ project on family archive inventories

Maria de Lurdes Rosa,

Randolph C. Head

I. The INVENT.ARQ project: Pre-modern noble families, archives and inventories

1. What were archives in pre-modern Europe? The team of scholars represented in this volume approach this broad question – one currently stimulating lively discussions among researchers working on Europe from 1100 to 1800 CE – at two levels in the ongoing INVENT.ARQ research enterprise and in this volume of archival descriptions and analysis. First, the project concentrates on a specific category of pre-modern archives, namely the collections built up by noble families, through a specific and highly revealing element found in many of them, namely their inventories. The authors in this volume provide detailed descriptions of thirty-six inventories and other tools for accessing archival records produced in Portugal from the 16th to the early 20th century. In parallel, thirteen analytical essays connect the features of specific inventories with the families

and specialists that made them, as well as the circumstances that spurred and shaped their production. We hope that the combination of description and analysis will prove valuable to historians working on many aspects of the history of Portugal and beyond.

Second, and more broadly, the INVENT.ARQ project aims to re-think European archives from an interdisciplinary perspective that combines history, anthropological history and archival science. Our objective is to offer insights into archival processes from the late Middle Ages to the present that are not anachronistic, but rather respectful of the alterity and the historically specific contexts of early modern archives.

Numerous reasons justify this dual approach. Theoretically informed analysis of a universe of related specific cases allows us to question the construction of history itself from what has always been considered its foundation and the guarantee of its validity: the archive or repository of sources. As each essay below illustrates,

archives and their inventories were in fact always deeply imbricated in multiple overlapping historical contexts, from ideological struggles to genealogical relationships. This ensured that archivists and the makers of inventories were inevitably active mediators, and not mere handlers of material traces of the past, who served administrators at the time and historians in the future. Close analysis of when, how and why new inventories were made also reminds us of the importance of social control over archives. At a deeper level, studying how records were represented in inventories and used by institutions helps us understand each institution's core and dynamics. Finally, understanding pre-modern archives as historical objects may help us to better grasp how information produced today can be preserved in ways that diverge from the state-oriented patterns that still predominate in traditional archival science.

2. The work presented here concentrates on a specific type of archive, namely nobiliary family archives from between the 15th and the 19th centuries. Several reasons explain this choice. The first is epistemological: these collections provide a favorable site for research. Nobiliary collections reflect the highly structured and identity-generating character of this type of kin-group within the larger social institution of the family in Portugal, reinforced through juridical structures that constructed noble titles, and particularly through the *morgadio* or family entail, which is at the center of many of the archives and inventories discussed here. Portuguese and European noble families also deployed considerable

cultural and symbolic capital that was constituted, in part, through their accumulated archival records, which also helped stabilize the relevant domainal and territorial basis of each family's power. Additionally, noble family members frequently performed political and administrative functions appropriated from the Crown or the Portuguese state, leading to revealing interrelations between public and private in the records they produced.

Another reason to address these archives and their inventories systematically lies in the preservation of the national historical patrimony that it enables. The studies in this volume focus on documents – either held by private individuals or deposited in public archives – that are both poorly studied and at the risk of dispersion, and that have, for the most part, been separated from their archival context. The project also brought together a group of researchers and post-graduate students who are studying these archives as part of their masters or doctoral investigations, and strengthened academic affiliations with a French-Iberian project dedicated to the same subject. As the essay by Véronique Lamazou-Duplan, Anne Goulet, Philippe Chareyre, and Alvaro Adot shows, collaborative and comparative approaches to noble family archives enrich an approach resting primarily on national perspectives.

3. To ensure a sharp focus, INVENT.ARQ concentrated on one well-defined archival product, namely on the inventories of the archives included in the project's scope. When they have been regarded at all in earlier research, pre-modern archival inventories – which

provided essential mediation between past users and the documents each collection contained – have usually been dismissed as outdated or flawed finding aids, or anachronistically interpreted. Historians might use old finding-aids as a substitute for absent documents, while archivists treated them as antiquarian items, or at best a limited tool to assist in the preparation of modern archival descriptions. Recently, however, historians of archives have argued that the archival inventory (as well as the cartulary before it) should be interpreted as a research object *per se* that allows scholars to address important theoretical questions. Examples include, i) studies of social history that look at inventories in relation to the particular institutions or the specific social groups that produced them, thus probing practices of power, social mobility, heritage and statutory defense, management skills, etc.; ii) cultural and political histories of archival tasks, such as classification and inventorization, that reveal past modes of knowledge; iii) archival science and historical studies on past knowledge systems, such as archival mediation, information literacy and information-seeking behavior, forms of knowledge organization (lists, glosses, notes), and the relationships among different tools for the retrieval of information in archives (inventories, cartularies, registries, etc.).

4. Interdisciplinary approaches are an integral part of INVENT.ARQ, drawing on history, historical ethnography, and archival science to offer interlaced and complementary perspectives. Historical analysis, by studying the families responsible for such production, allows us to

understand not only the contexts behind the production, but also the nature and objectives of each inventory. At the same time, refining our understanding of how various users interested in constructing narratives of the past accessed and used source documents puts historiography itself under observation, spurring us to reevaluate the relationship between historians and the archival mediation of their sources.

Extending the project's analysis through the 19th century allows us to observe the profound processes of change European societies went through in the 18th and 19th centuries, and how these changes were reflected in archival practices. Family archive inventories made during this period had to confront the collapse of Ancien Régime institutions, and of their foundations in certain forms of dominion and property. It is telling that detailed registrations of *morgadios* (entails) were a central purpose of the vast majority of the inventories done in this period, up through the abolition of the *morgadio* in 1863. The changing circumstances brought about by the Napoleonic wars, the post-war Liberal movements, and the emergence of new regimes of power and property transformed the use and meaning of medieval and early modern records, as the rapidly changing practices of inventorization described in this volume reveal.

Anthropological history helps enrich our understanding of the “family” in the context of the European Ancien Régime. The project aims to go beyond the analysis developed by traditional historians by valorizing structures that are distinctively highlighted in an anthropological perspective: kinship, symbolic representations,

forms of identity, and the cultural reproduction of dominion and power. One objective of the detailed essays in this volume is to characterize multiple institutional dimensions of the family in a non-anachronistic way, thus enabling a richer understanding how such institutional aspects are, to a considerable extent, mirrored in archival inventories. For example, to perceive the religious dimension of inventorying an archive, we must interpret the family not only as a projection of the divine family, but also and especially as a body that unites both the living and the dead in a co-dependent relationship centered in perpetual prayer and remembrance.

Lastly, archival science offers technical precision in its material and functional categories, which are needed to describe an inventory precisely. Here, too, however, the perspectives in the essays that accompany a number of the inventory descriptions allow a critical approach to archival science's disciplinary foundations, particularly concerning the way in which such objects are interpreted and used, the relationship that the object establishes with state-administrative history, and the fundamental principles such as provenance and *respect des fonds* that are involved.

II. Carrying out INVENT.ARQ: processes and outputs

1. In practical terms, the project began by establishing a first list of family archive inventories, consisting of some thirty exemplars dispersed among public and private archives and mostly new to historical research. To date, the project has carried out thorough

historical study and archival description of thirty-six documents – which form only a first sample, since our field research rapidly revealed that many more inventories could be added, particularly from private archives whose owners became gradually more interested in the project. The initial phase of the project involved creating a formal identification for each inventory in historical and archival terms: date and context of production, producers, main internal characteristics, specific purposes for its elaboration and use, archival techniques and expertise involved, and subsequent history. For many documents, these were very ambitious goals, since neither the inventories nor their producers had previously been studied.

The archival classification and description of these thirty-six exemplars raised significant challenges: most of the inventories were separated from the original *fonds*, which had for the most part disappeared or lacked proper descriptions. Some of these inventories nearly shared the destiny of their archives after the middle of the 19th century: made “useless” by the abolition of Ancien Régime's laws and social privileges, such archives were often sold, burned, or at best kept in attics and forgotten for decades. Since the inventories themselves were mostly large, carefully written, carefully bound and even sumptuous books, however, many were kept in family libraries, or even in the lord's chambers. They were thus more likely to be preserved than most archival documents, and they were also more prized when collections came up for antiquarian auction. This explains why for many archives, only the inventories remain, often in the collections of bibliophiles or in public libraries (where several

of the inventories entered through the purchase of bibliophiles' collections, not directly). Under such conditions, producing custodial histories is very difficult. Custodial history is also difficult in privately owned archives, which are often reconstitutions that gather together documents previously lost, or which at best depart considerably from an inherited nucleus. Even the best-preserved private archives also tend to be unorganized and dispersed among different residences and family branches. Dating, contextualization, and tracing the subsequent custodial history (within and outside the family/ies of the producers) were the greatest challenges the project faced, and it was sometimes impossible to provide definitive answers. Nor can most of these thirty-six inventories be related to any organically-based classification schemes in the underlying archives, since doing so would require thorough studies of the producer families and their collections. For the inventories currently kept in archival institutions (but not in association with the documents they refer to), reconstructing the original order at production by using an organic classification scheme would imply a reclassification that would make the identification and retrieval of relevant documents difficult. Only for *fonds* that have been studied and reclassified thoroughly, such as the House of Belmonte and the House of Castro-Nova Goa, were we able to correlate the surviving inventories with organic classification schemes.

In INVENT.ARQ's second phase, the researchers undertook the historical study of the collective and individual producers and archival accumulators involved, in order to produce consistent

authority records for the inventories. This task is important not only because archival descriptions without authority records are incomplete (though quite common), but also because codified authority information is valuable to and easily usable by researchers. The team managed to establish ca. one hundred and fifty authority records, covering institutional and practical producers as well as the archives' accumulators, reaching to the present. Refinement of these authority records is ongoing, since it will always be possible to gather more information; several also remain to be completed, since the family history and the custodial history of the documents are not yet known.

The third and last phase consisted of uploads to an AtoM database (the ICA-AtoM, open-source software developed within a project of the International Council of Archives), following standard archival descriptions (ISAD-G, ISAAR-CPF, and ISDIAH). This task provided very important experience for the project team, since it allowed full working contact with archival norms, which revealed both their usefulness and the need for adaptation that arises when they are used in private and historical archives. Developing the database helped train the team's "strong nucleus" in using the AtoM software, and also provided important opportunities to discuss approaches to patrimonial and family archives, focusing specially on digital archives and on the possibilities of open source technical software for their preservation and organization.

The digital database of the project contains the only full description of the documents and the sole complete gathering of the

authority records, while the catalogue entries in this book provide shorter versions of the central fields in each description, and are the only printed output available. In producing this pioneering work, the research team not only documents the INVENT.ARQ project's own results, but also provides a tool for ongoing investigation that can aggregate other inventories' archival descriptions, and respective authority records, either from Portugal or from other countries, on a collaborative basis.

This totally open-access and free database is accessible through <http://www.inventarq.fcsh.unl.pt/>.

2. Team scientific meetings, which took place in Lisbon at the Torre do Tombo National Archive in February 2015, formed a second important element of INVENT.ARQ. The public presentations and team workshop allowed focused inquiry into current issues in the field. These included the legal nature of family archives; the distinction between private and public archives in Ancien Régime society; the multiple nature and functions of finding aids; the ways families used their archives to manage, to dominate, and to reproduce their social status and power; and the ways in which these inventories have shaped the memories of families and houses, their internal conflicts, and their relation to public authority.

In addition, team members presented their detailed research on individual inventories, providing monographic short studies about interesting cases of reorganization and the use of archives, or on the persons involved on these affairs, which included “archival

experts,” family members with experience in record-keeping, guardians, and sometimes the landlords themselves. The essays in the first part of this book build on and go beyond the perspectives refined during the INVENT.ARQ workshops, reflecting the value of both an international approach and of theoretical perspectives on the history of archives.

3. The project website, accessible through the link below, represents INVENT.ARQ's third significant output. It gathers information about the project's goals, identifies the main research elements and results, and provides links to the project's digital outputs, namely the database and the online version of this book. All three main elements of the project are represented through the website: scholarly research on nobiliary family archives through their inventories, using historical, anthropological and archival science approaches; scholarly communication that brought together the researchers working on the individual cases and an international team of scholars engaged with the history of archives; and dissemination of both specific knowledge about a previously neglected corpus of historical inventories and of interdisciplinary essays contributing to current international research into archives as a historical subject of great interest.

<http://fcsh.unl.pt/arqfam/?portfolio=inventarq>

4. The final result of the project is a planned exhibition of a large majority of the documents studied, both from public and private collections. The exhibition is scheduled to take place from January to March 2016,

in Lisbon, at the Torre do Tombo National Archives. It represents a joint undertaking of the institutions involved in the INVENT.ARQ project, the National Archives, and the National Library.

III. Investigating inventories: results and outlook

The collaborative nature of INVENT.ARQ allows us to provide a first global analysis of the inventories studied – though a short and preliminary one – in response to our original questions. In doing so, we specifically avoid any kind of progressive history that would describe the improvement of technical features in these documents, from a putative mixed origin within the group of the cartularies to a final stage of modernization that made them similar to modern standardized finding-aids. This would be an historical as well as an archival error, since the inventories studied here emerged in very different contexts than ones created within the “evidence paradigm” of archivistics – to follow Terry Cook’s periodization – in which technical features are of primary importance as means to guarantee the neutrality of the archivists’ work and to provide rapid answers to an administration’s demands. To avoid the implicit teleology of the evidence paradigm, we instead apply a general typological approach to the set of inventories under consideration, in which the types we observe rest on a threefold basis: contextual demands, the internal organization of the inventories, and the kind of archival representation sought or achieved. While not substituting for deeper analysis of the documents we studied, either isolated or in groups,

this approach offers a systematic perspective for answering the questions we originally posed.

On the basis of the research team’s analyses, we distinguish seven different inventory types found among the material we collected and characterized. While not forming entirely closed groups, the inventories in each category display sufficient internal common identities and characteristics that they stand in a distinct relationship with the archives that they sought to represent. The seven groups we identify are:

- inventory-cartularies and books of charter-like material
- lists of documents, without transcripts of contents
- inventories produced in relation to specific legal or litigational contexts
- complex/mixed inventories, assembling genealogical and historical narratives, management information, and lists of documents from other archives
- simple finding aids oriented towards the internal management of estates, elaborated in the period of primarily internal regulation in family estate management (roughly mid-16th to mid-17th centuries)
- transitional inventories “on the boundary” of the 18th and 19th century
- 19th century inventories, which share the following characteristics: generally produced by archival experts, facing legal demands, in specific political contexts.

As can be seen, these types are heterogeneous. Our goal in defining them is to inductively outline the social complexity of archival practices, rather than relying primarily on technical approaches to the typology of inventories.

When considered in their proper historical contexts, which must be established non-anachronistically through a perspective grounded in historical anthropology, comparison of these thirty-six inventories reveals them to be varied and complex, possessing multiple natures (for comparable conclusions, MOURIER 2007; GUYOTJEANNIN 2010). The features of each inventory depended heavily on the “micro-contexts” of its production, from which each gained what we might call contextualized “technical goodness”. Such goodness might vary sharply from the qualities of rapid accessibility or clarity that are ideals for modern finding aids. For instance, when Friar José de Almeida Vasconcelos chose to organize the archives of his brother, the Viscount of Lapa, according to family branches, the final result was an impractical tool for document retrieval. Indeed, several other finding aids were soon produced to locate documents within this archive. But Friar José’s main goal, reflected in the organization he chose, was to show current and future family heirs the glories of their ancestors “through the archives”, in order to infuse respect, admiration and imitation. This was a moral rather than a strictly archival purpose, but as Terry Cooks reminds us in one of his last texts, the archive in pre-modern times confronted a different reality: “archives were driven by the need to commemorate, to celebrate, to symbolize, to legitimize those in power, and to

marginalize or efface or colonize their opponents, as much as they were by any need to preserve, without mediation or interference, transactional documents as unsullied evidence.” (COOK 2013, 102).

Our corpus does reveal a gradual tendency to distinguish inventories from other forms of representation of archival contents, such as cartularies, but the research conducted in this project revealed no clear evidence of technical reasons for this trend, and it remains perfectly possible to find mixed inventories (containing copies of documents, genealogical narrations, and references to other archives’ materials) in the later epochs as well as the earlier ones. Only from the late 18th century onwards can we identify clear signs of standardization, which are connected with the presence of trained archival experts who relied on general theories of archival organization. This is also a period when inventories began to be produced overwhelmingly because of strong Crown demands, which themselves reflected the demise of the Ancien Régime. In rapidly changing times, new inventories became essential to ensure effective management of a House’s resources, particularly as new laws in the 19th century first required the registration of core noble privileges such as the *morgadio*, followed by their diminution and ultimate abolition in 1863. Until this later period, however, these inventories and the documents they recorded, in our analysis, served the needs of an institution based on quite informal structures, namely the Ancien Régime noble family. Even if family structures were codified and socially accepted, they remained much more fragile than those of the two concurrent organizations of “state” and church. Indeed, families

turned to their archives in part to protect them from interference and growing demands from those two bodies, each of which possessed much greater skill in manipulating written, organized and preserved information.

The oldest documents in the sample, ranging from the middle of the 15th century to the end of the 16th, are mostly what might be called “inventory-cartularies” (BAUTIER 1993; MENDO CARMONA, 2005), which mix lists of documents with integral copies of others (notarial or not). A few also consist of simple books containing copied documents together with previous tables of contents organized to help in finding documents (Entries 1, 3,4, 8). Contemporary with this first set are several inventories that consist entirely of lists of documents (Entries 2, 5, 7); these lists, however, are quite similar to the lists found inside the inventory-cartularies. Such lists, whether combined with full copies or comprising an entire volume, point to a particular relationship with the documents, which no longer need to be copied and carried along. Instead, documents remained in permanent repositories, while inventories provided both summaries and the location of the original. Even the lists found in the inventories of the House of Vila Nova de Cerveira, the most detailed in this group, show neither apparent internal organization nor an elaborate system of reference to the documents. Rather, the extended document summaries they contained allowed these finding-aids to function as cursory cartularies.

Considering in context, these 15th- and 16th-century inventories reveal other particularities. The “Livro do morgadio do Canidelo”

(Entry 1) and the “Tombo das escrituras do morgadio do Esporão” (Entry 4) fulfill memorial as well as evidential purposes. The inventories are the written embodiment of an institution grounded on the founder’s will, in which heirs had to prove their capacity to inherit and manage by augmenting the family’s wealth – and by registering that accomplishment. For this reason, the substantial place that integral copies of the founding and re-founding documents occupy in these inventories is justified, and could not be replaced by brief mentions to them: such “morgadio books” are in themselves an archive. As for the *Tombo das escrituras de Pedro Eanes do Canto*, its first part captures mercantile practices of registry and management, organized in geographical order and constituting what we call authentic “processes” for each estate. The second part of the book reflects the circumstantial context of conflict between Pedro Eanes do Canto, a particularly successful member of the established local oligarchy, and a powerful royal officer, the royal treasurer and king’s esteemed collaborator, Vasco Eanes Corte-Real. The conflicts revolved around lands, properties and seigneurial rights, and led to the intensive registration of actions and documents, turning this particular inventory into a sort of live archive of the conflict.

Legal disputes regularly seemed to fuel the practice of organizing rapid and easily accessible document lists throughout the period under study. All of the documents in this category (Entries 2, 6, 10, 20, 23), however, co-existed with much more complex forms of inventories, and were sometimes even produced by the same experts, as was the case of João Filipe da Cruz, who in other well known cases

employed very accomplished archival practices and theories in his work (see Nóvoa/ Leme on this volume).

Another identifiable group is formed by inventories that gather heterogeneous types of information: for example, lists of documents in a family archive (in general organized by the types of property they referred to, according to legal status or nature – entails, free estates, money, privileged rents and revenues, royal favors), genealogical/historical narrations, and lists of documents from other archives (usually the royal Torre do Tombo) (Entries: inv. 9, 11, 13). In the case of the *Livro da Fazenda do conde meirinho-mor* (Entry 9), we face a different mixture, that is, an inventory combining references to documents with accounts for the count's property and revenues, which in some aspects resemble a book of accounts.

From roughly the middle of the 17th century to the last decades of the 18th, we find a group of largely “internal” inventories, that is, documents that, though varied in how they represent their archives, mostly served the management practices of the landlords, and seem to have been prompted by these (Entries 12, 14, 15, 16, 17, 18, 19). Such inventories are organized in various ways, including as “alphabets”, “master books”, and “indexes.” The document summaries they provide are in general short, and sometimes undated. These inventories typically categorize and group documents first by the type of property ownership (such as property in entails, free of entail, or owned through various legal relationships with the crown) that was involved. Within these groupings, the order of documents is most often territorial (or there are toponymical indexes to allow

access by place names). Though only a deeper study could achieve more certainty, these books appear to have been created in a period where family estate management mostly involved day-to-day issues, without major external interference or demands from the Crown. The problems that they anticipated or responded to were primarily internal to the family sphere, that is, they concerned inheritances and estate partitions.

The inventory of Friar José de Almeida Vasconcelos mentioned above, produced in 1804-1805 as a monument to the glory of the House of Lapa, represents a boundary case, a last exemplar of a world soon to vanish (entry 21; see study by Henriques/ Rosa in this volume). It was a major work that organized hundreds of documents according to the family's branches (while also considering the legal status of the estates) and was bound into three luxurious volumes, ornamented with the coats of arms of the different branches that lay at the origins of the House since the 12th century. Although he had chosen a particularly “impractical” – but highly symbolic – way to organize and represent his brother's archives, Friar José knew that other tools would be necessary in order to retrieve documents, and he left instructions for creating these (he may have even produced one, unfortunately lost). His comments suggest that he was familiar with contemporary archival work and theories. Not only had he belonged to an ecclesiastical congregation that prized knowledge about library and bureaucratic management, but some years later he organized the archives of the Portuguese siege of the Maltese Order according to methods that prioritized “efficiency”. Indeed,

he was probably a member of the first group of archival experts who began to bring rational theories about archival organization and management to Portugal, of whom the main exponent was Fr. Francisco de S. Luís, who organized the archives of the Benedictine Order, wrote extensively on the proper conservation of archives, and helped organize the archives of the House of Sá (Counts of Barca, in Northern Portugal) (RODRIGUES, SILVA, 2012: 600-601, 610-11, 617). Even in the Lapa inventories, which accented the memorial and representational value of their collections, some novel practical features appear. The Lapa inventories can thus be placed on the boundary of old and new worlds.

In this, they are similar to the quite amazing archival work that had been going at an estate whose owners had close family ties with the Viscount of Lapa, the *Morgados de Mateus*. In fact, Mateus can be seen as an archival laboratory, where ongoing labor on the organization of the documents was promoted, or even carried out by the lords themselves, from the middle of the 17th to the 19th centuries. Thanks to the research and present day archival maintenance promoted by the family, carried out under the supervision of Armando M. da Silva and Abel Rodrigues, the exceptionally well-kept archives of Mateus provide evidence of successive attempts to organize and inventorize the documents; among these, what these scholars classify as an “*Enlightenment*” method, which involved classification according to “natural” categories, rational thought, and strong orientation to management purposes, triumphed in the late 18th century (RODRIGUES, SILVA, 2012).

The last and largest group is formed by the 19th century inventories, which clearly reveal a transformation of former practices under new political conditions that were capable of exerting strong legal pressure on noble proprietors (Entries 22 and 24 to 36). The *Tombo do cartorio da Casa*, of the House of Belmonte, dating from 1807 (entry 22; see study by Sousa in this volume), provides a clear early example: it was most probably produced in the context of the first Count’s departure to Brazil, accompanying the Royal Family and a large part of the court nobility who fled from the French army that was to occupy the realm that November. Facing change driven by external forces, the family sought to protect their property from the danger of expropriation or loss under very troubled circumstances. As the 19th century continued, though, broad systemic change also accelerated, transforming many elements of Portuguese society, politics and law. In response, leading noble families begin hiring experts to organize their “titles,” as a way to either forestall or comply with new legal demands from the rapidly evolving state institutions.

Such legal demands had already begun to increase in the middle of the 18th century, under the Absolutist policies carried out by the Marquis of Pombal. After the triumph of the Liberal Revolutionaries from 1820 onwards, however, their intended reach and consequences were much deeper. Pombal’s laws on entails had sought to create some order among the chaos of innumerable *morgadios* and chantries that had been accumulating since the late 14th century, while also trying to avoid further indiscriminate foundations. The Pombaline legislation therefore limited new entails

to the higher nobility and elite groups, according to estimations of the value to be entailed. Major criticisms of the fundamentals of the system – allegedly created for the maintenance of families and the care of souls – were implicit in Pombal's steps, which rested on a clear understanding of the major inner problem that entails caused: the land's immobility. But the times were not ripe for Pombal's ambitious reform program (in this as in many other areas), and the Minister fell into disgrace before his new laws could attain full effectiveness.

Looking at changes in family archives in this period, however, it is clear that Pombal's laws alerted many lords to the problem of disorganization among their documents, particularly with respect to foundation documents and other proofs of privileged status. Additionally, families often found it difficult – if not impossible – to adequately document centuries of inheritance and dowry transactions that had introduced additional particularities and complexities. A very well documented example of this situation appears in the inventories made by Francisco Trigo de Aragão Morato, (presented in this volume by Filipa Lopes). As a learned estate owner, Aragão Morato organized his own family's charter-room in the years 1825-1826, creating the inventories described in entries 27, 28 and 29. His efforts were motivated not so much by the changing legal system – of which he was perfectly aware, since he held (moderately) liberal beliefs and had participated in some of the recent changes as part of the new government –, but by the huge practical difficulties he faced when managing the partition of his deceased brother's estate, for which it was necessary to accurately

identify the entails and other privileged property. He also became concerned that in addition to the internal family conflicts partitions could bring, his family would also face serious difficulties when the time came to prove the privileged status of its properties to state administrators.

Thus, many inventories produced in the first decades of the 19th century represented preventative actions against looming threats – even if the threats took longer to arrive than anticipated, owing to the difficulties the Liberals faced in firmly cementing their power and establishing new political and administrative systems. The civil war between Liberals and Absolutists, which raged from 1828 to 1834, delayed major changes until after the final victory of the Liberals. New laws on privileged property began to emerge in the 1850s, and reached their full scope in 1863 with the formal abolition of entails. As the new laws unfolded, demands to register family documents and to prove estates' status, origin, and nature kept getting stronger and more bureaucratic. The new state offices charged with enforcing the changes prepared formularies and instructions, and imposed standards about which documents were valid, and how they should be presented to registration offices. New inventories in this period were primarily intended to help families to prepare for the new “Registo vincular” (registration of entailed property), rather than presenting the complete contents of charter rooms. Against this background, the charter rooms themselves began changing, as newly “useless” documents were neglected, destroyed or sold. This new approach differed from the negligence and disorganization that had

characterized many repositories before 1800, since it acknowledged that things would never be the same. The State reconfigured private archives in a lasting way by changing their place in the political and legal process.

The last inventory studied in the project, describing the Castro family archives (Counts of Nova-Goa since 1864), provides an excellent example of this transformation. As shown in Patricia Marques's contribution in this volume, the Castro documents were reorganized according to the demands of the new entail registration laws, in effect creating an entirely new archive; it was this "new-old family archive" that the inventory mirrored. The family, which had been located in India (Baçaim [modern Vasai] and Goa) since the 16th century, had accumulated multiple entails located in continental Portugal by marriage or by inheritance. Their distance had hindered the correct maintenance of their archives, however, so that when registration became obligatory, the head of the family – the stepfather and legal guardian of the heirs – had to create the archive almost from the bottom up. He searched for documents in the family's houses, sought notarial copies from royal Torre do Tombo and other archives, and gathered simple copies from other family branches or acquaintances. The resulting family archive consisted mainly of copies, and its inventory displays a structure imposed by the new legal demands – legal demands whose ultimate intention was precisely to extinguish the world that had created the originals. ■

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Médiations ou déviations?

Les inventaires, entre archives et historiens

Joseph Morsel

Depuis une vingtaine d'années, les historiens prennent de plus en plus conscience du fait que le sens des documents ne réside pas seulement dans ce qu'ils disent (leur contenu) mais aussi dans leur forme, matérielle et visuelle (pour une première approche, cf. Morsel 2009). De ce fait, p.ex., l'édition n'apparaît plus que comme un mode particulier et partiel de mise à disposition du document historique (Cerquiglini 1989). Toutefois, le problème de l'accès au document va plus loin que le seul niveau de l'heuristique: le problème ici n'est pas seulement de comprendre *ce que dit* le document mais aussi et surtout d'écarter ce qu'il ne dit pas – mais que l'historien pense y trouver parce que, malgré lui, il l'y *projette*, avant même d'en lire le contenu.

1. L'inventaire comme mode de disponibilisation

À cette appropriation naïve (préconstruite) on peut trouver schématiquement deux fondements principaux. Le premier est d'ordre conceptuel: il s'agit des effets de sens qui pèsent sur la lecture historique des documents du fait même que ces documents sont *qualifiés* de diverses manières, usuelles pour les historiens, mais qui orientent leur recherche et leur compréhension; un certain nombre

de ces catégories font désormais l'objet d'études serrées («sources», «archives», «chartriers», «documents», «texte», «traces», etc.)¹.

Le second problème auquel on s'attaque également est la méconnaissance des effets de la disponibilisation (c'est-à-dire des procédures de mise à disposition). Le premier caractère des documents sur lesquels travaillent les historiens, en effet, n'est pas qu'ils ont été écrits mais conservés (Pitz 1959, p. 18): le caractère écrit concernait en effet tout autant ce qui a aujourd'hui disparu, il n'est donc pas ce qui spécifie notre matériau de travail. La question se pose alors de comprendre quelle est la logique sociale à l'arrière-plan des stratégies de conservation qui se sont mises en place en Occident à partir du haut Moyen Âge et qui, en dépit du coût social (matériel et humain) élevé lié à la difficulté que représente le fait de conserver sur plusieurs siècles des masses très considérables de documents, nous permettent d'y accéder légitimement dès lors que nous nous positionnons comme historiens.

Mais «conservation» ne signifie pas seulement «non-destruction»: ces documents non détruits nous sont également parvenus classés, c'est-à-dire associés rétrospectivement à d'autres documents et, inversement, séparés de documents avec lesquels ils entretenaient à

l'origine un rapport d'intertextualité dont la connaissance nous serait des plus utiles pour comprendre le document en question. Cette intertextualité d'origine brisée et cette intertextualité rétrospective concernent d'ailleurs tout autant les pratiques d'édition.

Par conséquent, les historiens prennent désormais conscience des multiples biais qu'induisent les formes de disponibilisation: accéder à un document par l'intermédiaire d'une édition, dans un dépôt d'archives (public, donc théoriquement ouvert; privé, donc théoriquement filtré), d'un fac-similé, sur Internet, a nécessairement des effets sur notre manière de travailler, sur l'usage que nous faisons du contenu, sur les questions que nous nous posons et celles que nous négligeons, sur le rapport au passé que nous produisons. Indépendamment de ce dont parle un document, devrait alors être intégrée par l'historien à sa lecture une réflexion sur la manière dont il s'est procuré le document – ou plus exactement, pour changer l'image de l'historien comme sujet autonome, la manière dont le document a été mis à sa disposition (disponibilisé).

Contrairement à l'usage langagier courant, en effet, il n'existe pas de «sources disponibles» à l'état natif, l'historien n'y a accès qu'à l'issue de toute une série de procédures qui déterminent la possibilité de travail de l'historien (y compris sur des sujets non brûlants de l'histoire contemporaine). Or l'une de ces procédures est l'inventaire, parce que l'historien travaille sur des documents conservés, classés et inventoriés. Vers 1900, les pères de l'histoire positive, Charles Seignobos et Charles-Victor Langlois, reconnaissaient déjà que:

«Les documents que renferment les dépôts et les fonds qui ne

sont pas inventoriés sont vraiment comme s'ils n'existaient pas pour tous les travailleurs qui n'ont point le loisir de dépouiller eux-mêmes, d'un bout à l'autre, ces dépôts et ces fonds. Nous avons dit: pas de documents, pas d'histoire. Mais pas de bons inventaires descriptifs des dépôts de documents, cela équivaut, en pratique, à l'impossibilité de connaître l'existence des documents autrement que par hasard. Disons donc que les progrès de l'histoire dépendent en grande partie des progrès de l'inventaire général des documents historiques, qui est encore aujourd'hui fragmentaire et imparfait.» (1898/1992, p. 38)

2. L'inventaire comme passeport incertain vers un monde inconnu

La position de Langlois et Seignobos repose à première vue sur deux implicites: l'inventaire des documents est une procédure technique neutre («descriptive»), et l'existence d'inventaires réellement utilisables par les historiens n'est encore qu'un rêve (d'où le caractère «fragmentaire et imparfait» de ce dont on dispose). Il est difficile de dire, dans ce second cas, si les deux historiens négligent carrément l'usage des inventaires anciens, datant pour la plupart de l'époque moderne, et/ou s'ils les considèrent comme un pis-aller, avant que l'archivistique moderne produise effectivement les inventaires rêvés. Le fait est que, plus d'un siècle après ces lignes, des fonds historiques entiers restent toujours accessibles uniquement à l'aide d'inventaires analytiques anciens – ce qui signifie par conséquent qu'un médiéviste devra également être capable de maîtriser la

paléographie des XVI^e-XIX^e siècles (les inventaires suivants étant écrits à la machine à écrire puis à l'ordinateur).

Mais Langlois et Seignobos s'inscrivent également dans une perspective historiquement datée des rapports entre historiens professionnels et archivistes, dans laquelle les seconds étaient conçus (et pendant longtemps se sont eux-mêmes pensés) comme étant au service des premiers. Que, comme l'indiquait l'archiviste canadien Terry Cook (2009), cette conception soit aujourd'hui dépassée ou en tout cas doive être remise en cause n'est pas le plus important: ce qui compte est le fait que cela laissait (et souvent laisse encore) croire aux historiens que les archives sont faites pour eux, donc que les inventaires sont des instruments d'utilisation simple et *historian-oriented*... Il s'agit là d'une illusion, nourrie par la posture de l'historien en tant que consommateur final et inconscient des conditions de production de son savoir, que Terry Cook assimilait à un touriste en pays étranger, qui n'en découvre que ce qu'en dit le guide dans lequel il a toujours le nez – un guide dans lequel on pourrait sans doute voir une métaphore de l'inventaire si l'historien savait au moins se servir de ce guide...

Car la situation dominante est celle que l'archiviste belge Eddy Put qualifie d'«analphabétisme documentaire» (2006, p. 287), pour désigner la naïveté des historiens plus ou moins débutants quant à l'usage des inventaires, qui limite drastiquement leur capacité à trouver (tout) ce qu'ils cherchent. Faute de concevoir la nature spécifique du travail des archivistes, en négligeant p. ex. de lire la préface des inventaires où sont expliquées les conditions de leur

élaboration, les historiens utilisent les inventaires comme s'il s'agissait de cartulaires factices, donc comme si la description de chaque pièce inventoriée renvoyait mimétiquement à son contenu – c'est-à-dire comme si la finalité de l'inventaire était de fournir des informations historiques alors qu'il s'agit d'identifier des pièces d'archives.

Or l'index de l'inventaire ne renvoie pas au contenu des pièces elles-mêmes mais à la description que l'archiviste en a faite: c'est donc le travail de l'archiviste qui est indexé (et non le contenu des documents) – une indexation dépendante non seulement du soin de chaque archiviste mais aussi et surtout du type de document (les chartes sont inventoriées une à une, tout comme chaque registre – mais sans le détail des pièces), selon la logique archivistique pour laquelle n'existent que des unités physiques particulières, identifiées chacune par une cote spécifique. Le but de l'inventaire est en effet d'identifier et de retrouver les pièces d'archives, et non pas les informations qu'elles contiennent: le contenu n'est que le moyen d'identifier la pièce (tout comme les indications fournies sur une carte d'identité sont censées permettre de reconnaître qui est la personne, pas d'en dire ce qu'elle est), la cote étant, elle, un système de coordonnées spatiales qui permet non seulement à l'archiviste de trouver le document mais aussi et surtout de le remettre à une place constante – alors que pour l'historien la cote est le numéro de commande du document, comme un numéro de référence sur un catalogue de vente...

Les archives ne sont donc pas faites pour les historiens mais pour les archivistes (soit en tant qu'agents de l'institution qui produit et utilise les archives dans le cadre de son fonctionnement courant,

soit en tant qu'agents de l'institution qui a reçu les archives une fois qu'elles ont cessé d'être courantes et donc qu'elles ont été versées à un dépôt chargé du triage et de la conservation; c'est normalement avec ce dernier type que travaillent les historiens); et les instruments de travail qu'ils y trouvent sont établis en fonction des besoins des archivistes et non pas des historiens. Lorsque ceux-ci s'en servent sans tenir compte des modalités de leur confection, donc sans développer une stratégie heuristique propre, ils s'interdisent de trouver tout ce que recèlent les fonds.

Par conséquent, il y a quelque naïveté chez Langlois et Seignobos à croire qu'il suffit de faire des inventaires pour que les historiens puissent travailler: encore faut-il qu'ils apprennent à s'en servir, c'est-à-dire qu'ils sachent comment ils ont été réalisés et à quelles fins, sans quoi ils ne produiront que l'illusion d'un savoir rationnel. Ce genre d'illusion liée à la négligence des conditions de production des objets, utilisés en fonction de la croyance qu'on y met et non pas de leur utilité réelle n'est qu'une autre forme du fétichisme (ici le «fétichisme de l'inventaire») qui caractérise le fonctionnement de notre société.

3. L'inventaire comme système cognitif

Toutefois, le problème n'est pas seulement de comprendre de quelle manière on a procédé à l'inventaire, comme si l'inventorisation était en soi une simple technique de description, dont seuls varieraient les critères retenus, l'ordre de leur présentation, le soin ou l'attention

plus ou moins grande apportée aux détails (d'où les distinctions entre répertoire, inventaire sommaire, inventaire analytique, etc.). Procéder à un inventaire ne va en effet pas de soi, ni ne constitue une procédure simple et routinière – quiconque aura déjà tenté d'inventorier ne serait-ce que les livres de sa bibliothèque aura remarqué les multiples difficultés qui apparaissent rapidement dès lors qu'on vise à la fois à l'exhaustivité et à la facilité d'usage. Ceci implique alors de préciser deux choses: qu'est-ce qu'inventorier? Et à quelle finalité répond l'inventaire (puisque l'inventaire en soi n'existe pas)?

Pour ce qui est de la première question, il convient de remarquer que les inventaires d'archives relèvent de la vaste catégorie des inventaires – d'objets, des droits, de personnes, de lieux, etc., dont quelques exemples sont bien connus: polyptyques carolingiens, *Domesday Book*, censiers, pouillés, registres de visite pastorale, etc. Ces inventaires découlent de procédures de rassemblement des données: l'enquête (*inquisitio*), pratique sur laquelle se sont multipliés des travaux ces dernières années (Clanchy 1979, Gauvard 2008, Pécout 2010, Dejoux 2014), orientés principalement dans une perspective de contrôle: l'inventaire ne serait ainsi pas simplement un instrument de gestion, à valeur cognitive, mais plutôt la manifestation d'un pouvoir de contrôle.

Si l'échelle spatiale de cette affirmation de contrôle est éminemment variable (tout dépend de la nature des items inventoriés, c'est-à-dire des rapports sociaux qu'ils matérialisent), on doit s'interroger sur son échelle temporelle: si l'inventaire est aujourd'hui *disponible*, c'est donc qu'il a dépassé l'échelle d'une vie,

dépassement assuré par une institutionnalisation qui a assuré sa dépersonnalisation et sa décontextualisation – mais dont rien ne dit qu’une telle durée avait d’emblée été prévue pour l’inventaire. C’est ici qu’un examen matériel (paléographie, codicologie, etc.) soigné peut permettre de suivre la genèse de l’objet qui est entre nos mains, au lieu de ne l’utiliser que comme produit technique fini.

Par conséquent, l’inventaire doit être examiné dans ses deux dimensions, à savoir celle des rapports sociaux qui lui ont donné naissance et qui renvoient nécessairement à un enjeu important (vu la complexité de l’opération, et vu la volonté de contrôle que manifeste éventuellement la procédure même d’inventorisation), et celle des rapports sociaux qui ont conduit à sa conservation jusqu’à nous, alors même que les archives ont pu être entre-temps reclassées, et donc les inventaires anciens rendus inutiles. À l’inverse, évidemment, l’absence de tout inventaire jusqu’à nos jours peut également être considérée comme significative – mais de phénomènes qu’il importe de préciser au cas par cas (de la négligence liée à une estimation basse de l’intérêt des archives au refus délibéré de fournir une vision d’ensemble de ce qu’il y a et de ce qu’il n’y a pas – ou plus).

Car l’inventaire relève lui-même de la catégorie plus abstraite des listes, dans lesquelles Jack Goody voit le paradigme de l’écriture comme «raison graphique».

«The list relies on discontinuity rather than continuity; it depends on physical placement, on location; it can be read in different directions, both sideways and downwards, up and down, as well as left and right; it has a clear-cur beginning and a precise end [...].

Most importantly, it encourages the ordering of the items, by number, by initial sound, by category, etc. And the existence of boundaries, external and internal, brings greater visibility to categories, at the same time as making them more abstract.» (1977, p. 81)

En tant que liste, l’inventaire permet ainsi tout à la fois la définition d’un ordre (correspondant au classement des archives, d’autres listes – les index – procédant à des reclassements virtuels) et la définition d’un ensemble (ce qui n’est pas inventorié n’en fait pas partie, sachant que l’on ne s’intéresse ici qu’à ce sur quoi travaillent les historiens, qui ne sont plus des archives courantes). Mais ces deux dimensions (ordre et démarcation) n’excluent en rien celle qui consiste à spécifier l’objet individuel: précisément, l’organisation séquentielle, non linéaire, du texte de l’inventaire (avec ses paragraphes, ses numéros d’item, ses éventuelles balises – pieds-de-mouche, majuscules initiales développées ou colorées, etc.), qui rend possible cette navigation multidirectionnelle dont parle Goody, risque d’entretenir chez l’utilisateur l’idée que l’inventaire est fondamentalement *item-oriented*, alors qu’il résulte en premier lieu d’une démarche de constitution d’un ensemble clos et ordonné (que Goody ne cherche justement pas à évacuer), destiné tout autant au repérage des pièces individuelles qu’à celui des manques, c’est-à-dire de ce qu’il y a mais aussi de ce qu’il n’y a pas – ou plus, comme on l’a vu.

Ceci ne nous ramène pas seulement à la logique de contrôle (pour éviter la disparition des choses), mais cela soulève surtout la question de cette nouvelle modalité de disponibilisation qu’est l’Internet – question qui ne se pose pas seulement pour les pièces

d'archives individuelles (et sur laquelle les archivistes s'interrogent effectivement, par exemple lors du congrès annuel des archivistes allemands tenu à Marburg en octobre 2013, consacré à la digitalisation des archives comme nouvelle voie de disponibilisation du matériel archivé: Becker-Oertel 2015), mais aussi pour les inventaires (qui sont eux aussi, on l'a vu, des pièces d'archives, même s'ils ont en outre une dimension méta-archivistique).

Le problème n'est évidemment pas l'Internet lui-même, mais les modalités d'affichage adoptées par les sites archivistiques, qui privilégient la lisibilité et la mise en scène de l'institution sur la visualisation de la structure de l'objet sur lequel porte la recherche. Par conséquent, les interfaces proposent des navigateurs de recherche plus ou moins directifs – mais toujours dépendants de la manière dont l'inventaire a été constitué, dont la documentation est encore moins présente que dans l'inventaire imprimé (l'«analphabétisme documentaire» a donc encore de beaux jours devant lui...) – à la suite de quoi sont affichés les résultats de la recherche, en tableau ou par (multi-)fenêtrage, moyennant quoi chaque résultat est extrait de sa série d'origine. Ce mode d'affichage (qui n'est pas obligatoire, comme le montrent certains sites lexicologiques où l'interrogation sur un mot ne conduit pas à l'affichage du mot recherché mais de la page complète, avec les mots précédents et suivants, ainsi qu'une arborescence complète en bandeau gauche) de l'*item* et non pas de sa place dans la structure a comme conséquence de rendre absolue l'*item-orientation*, phase ultime du «fétichisme de l'inventaire» dont on a déjà parlé.

Un autre problème lié à ce mode de disponibilisation *item-oriented* des inventaires est qu'on ne voit plus non plus apparaître ce qui manque (puisque le vide n'existe que par rapport à une structure). Les modalités de l'affichage, tout comme de l'indexation, ne permettent que de trouver ce qui a été repéré ou jugé digne d'être mentionné, certes, mais ne permettent pas de rendre perceptible (*i.e.* présente) l'absence (l'interruption d'un inventaire ancien, son caractère incomplet, la perte de feuilles ou de lisibilité n'apparaissent pas). La valorisation de la présence aux dépens de l'absence avait d'ailleurs déjà été soulignée par Ryan Szpiech (2014) à propos d'un manuscrit de *Pugio Fidei* conservé à l'Université de Coimbra, dont l'intérêt majeur par rapport aux autres versions connues réside précisément dans ce qu'on ne repère pas directement sur internet, à savoir une colonne vide correspondant à une traduction castillane qui n'a pas vu le jour.

Qu'on ne s'y trompe par conséquent pas: la résolution des difficultés de l'historien à accéder aux archives qui l'intéressent ne passe pas seulement par des actes techniques (c'était déjà, en fait, l'illusion de Langlois et Seignobos vers 1900). Tant que les historiens ne verront dans les inventaires que des instruments plus ou moins élaborés, ils resteront prisonniers d'une logique cognitive qui biaise inéluctablement leur capacité à produire un discours rationnel et fondé sur les sociétés anciennes. ■

Notes

¹ Sources: Kuchenbuch 2000, Morsel 2003, Rathmann-Wegmann 2004. Archives: Anheim-Poncet 2004, Cook 2009. Chartiers: Contamine-Vissière 2009. Document: Le Goff 1978. Texte: Cerquiglini 1989, Kuchenbuch-Kleine 2006, Chastang 2008. Traces: Krämer 2007, Morsel, forthcoming.

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Family archives: the paradox of public records and private authority

Randolph C. Head

The history of family archives, such as the ones analyzed in this volume, is built on a seeming paradox: essential characteristics of an archive as a quintessentially public institution apparently clash with essential characteristics of families as the paradigmatic locus of private life. Closer examination unravels the paradox, however. As the essays in this volume confirm, European families – and particularly European noble families from the High Middle Ages through the *Ancien régime* – did build impressive collections that took on archival character in various ways. Not only that, but as Elio Lodolini shows in his masterful survey (Lodolini 1997), the complex interweaving of public and private elements in both the documents such families preserved and the individuals they chose to manage and organize their records provides powerful insights into European political culture and European knowledge cultures as they evolved through the centuries.

In order to elucidate the theoretical and practical tensions inherent in the idea of family archives, this essay will review central theoretical claims that resonate throughout European thinking

about recordkeeping from late Antiquity through the eighteenth century. In particular, the public nature of certain records, their *publica fides* and the special value that belonging to the category of public records bestowed on them, will draw our attention. One of the consequences of evolving legal and political theory in the seventeenth and eighteenth centuries – notably in France and the German lands – was that new and more explicit ways emerged to define what it meant for a document to be ‘public’ or ‘private’. The debates among jurists and historians of this period thus provide valuable insight into how Europeans thought – and still think – about archives. Meanwhile, underlying claims to special authority for public documents came to be complemented by a wide variety of local practices under the changing political systems of late medieval and early modern Europe. The family collections analyzed so lucidly in this volume provide illuminating examples of how public and private intertwined in the particular case of Portugal (in ways at once distinct from, yet very much in concord with changes transforming other European regions), before moving into

new, more formally distinct configurations during the nineteenth century.

Records, Roman law and public documents

Since the invention of writing, humans have been creating records – that is, they have been entexting traces of actions seen as important, so as to make an authoritative recollection of that action possible at some later time. Record-creation was only one way writing was put to use, of course, nor were all records equal: some were carefully preserved and zealously guarded, others might function as traces, memories, or proofs for a shorter or longer time, then be discarded without hesitation. Some records were kept secret and hidden, others engraved into wooden, metal or stone tablets and publicly displayed (Posner 1972; Sickinger 1999). Practices diverged both because of differing local circumstances and because of profoundly diverse cultural traditions. Indeed, there are many possible ways to make, keep and use records, among which the European approaches discussed here are only one particular case.

European thinking about who could make records, and particularly about who could preserve them in ways that gave them special authority, derived in important ways from the theories of Roman law and the practices of the late Roman administrative state (Demougin 1994). Of particular importance was the establishment in the later Empire of a special office, that of the *tabellio*. The *tabellio* possessed by imperial appointment

the capacity to receive, authenticate, and preserve private records that documented the terms of contracts, agreements, wills, and other agreements among individuals. His collection, called the *tabularium*, thus represented a forerunner of the European public archive. Should disputes arise, material drawn from the *tabularium* possessed special authority as evidence – known as *publica fides*, public faith – such that the party disputing such evidence bore the burden of proving it was flawed. In short, records registered at a *tabularium*, the *instrumenta authentica* or *instrumenta publica*, enjoyed both presumptive authenticity and superior authority over other evidence. Although it remains debatable whether the narrative above describes an empirical history of practices, or represents a projection backwards from the later Middle Ages, medieval and early modern European legal thinkers certainly thought they were conforming to – or re-establishing – virtuous Roman precedent in attributing special authority to public instruments. (Van Caenegem 1991; Nicolaj 2002; Lodolini 1997, 34; from a critical perspective, Schulte 2008)

Even though the Roman legal system either collapsed entirely or mutated beyond recognition in subsequent centuries, the idea that documents preserved and authenticated by public authority were superior to all others remained. Throughout late Antiquity and the early Middle Ages, some papal documents continued to be recorded in the papal registers – a new kind of *tabularium* – and as early as the 11th century, public repositories reappeared in Italian cities in the form of notaries and their registers, established

and licensed now not by the emperor, but by merchant urban communes who had every interest in sustaining the security and authenticity of contracts. The notarial tradition remained the most closely aligned with earlier Roman conceptions, and played a vital role across southern Europe from the very beginning of European societies in the tenth and eleventh centuries (Nussdorfer 2009; see also Société Jean Bodin 1963-65). In the absence of functioning central authority across much of Europe, however, other forms of authentication also flourished, such as the seals borne by nobles and privileged corporations that documented their status as public actors, and the archival treasuries and cartularies preserved by monasteries. Even here, however, the public status of the guarantor – a lord and his entourage, a commune issued a seal by the king, a monastery founded by a noble family and recognized by the Church – lent authenticity and forensic force to the records that they preserved.

As medievalists have been showing us recently, medieval European practices for using such records could diverge very far from both Roman and modern expectations, however, and varied substantially from place to place and time to time in form, purpose and content. Yet the essentially *public* character of authentic documents remained a durable principle and ideal (Bedos-Rezak 2002; Teuscher 2012; on early modern and later developments, see Lodolini 1997; Head 2013). One of the inventories analyzed in this volume provides a typical and illuminating demonstration of this principle. In his introduction to an inventory produced for

the 3rd Count of Sortelha in 1609, Gaspar Coelho Aranha argued that his noble employer should proceed by “imitating the kings, our grandfathers, who have in this kingdom a house dedicated to the Royal Archive...”, which enabled them to “know the origins of the properties and wealth of the kingdom, as these are conserved in public documents (*escrituras publicas*) in the Torre do Tombo.” The Counts, Aranha proposed, should similarly create a durable cartulary (*cartorio*) of their own documents, to be kept in their own “Archive of the Torre do Tombo of Goís,” mirroring the royal archive for their own private documents in a small village outside Coimbra (*Tabuada*, ff. 2-4; for more details on this inventory and its own history see below [entry nr. 11. *Tabuada do cartório da Casa de Sortelha*]).

As this example shows, the nature of political power and authority in old Europe generated a historically and culturally specific way in which the public character of many records became intertwined with the private affairs of the powerful, from Portugal to Poland and from Ireland to Italy. Variations of this entanglement appear in a gradient that stretched across medieval Europe: on one end, we find the high medieval notarial registers of Italian cities that were, like the *tabularium*, open to all citizens, or at least to all litigants, for inspection; on the other end, we find the emergence of closely guarded treasuries of records, which allowed “documents [to be] drawn just like weapons, so that the interests of a lordship could be battled for, defended, stiffened, preserved and maintained,” as the German author Georg Aebbtlin put it in 1669 (Koch 1995; Aebbtlin 1669, 40).

When jurists, philosophers and historians in the seventeenth and eighteenth century began debating about proof and evidence, the tension between an ideal of public records and a reality in which many vital proofs lacked public authenticity became increasingly visible. The paradox of private archives – repositories of public records in hands other than the emerging sovereign state, which claimed a monopoly on public authority – generated heated debates and diverging interpretive models (see Head 2013). Nicolaus Mylerus, a German jurist writing in 1658, expressed the problem this way: “The entire force of an archive, and of its records, depends on the authority of him in whose power the archives are” (Mylerus 1658, 372). His contemporary Nicholas Christoph Lynker agreed: “Private chests,” he wrote, “of themselves do not deserve the name Archive, because they do not have public faith” (Lynker’s quotation appears in Wencker 1715, 85). Families, in this view, could have an archive only insofar as they were sovereign or embodied public authority, a hotly disputed matter at this time. French intellectuals also wrangled over the paradox of public instruments located in private repositories. On the one hand, the great diplomatist Jean Mabillon constructed an entire discipline in his *De re diplomatica* (1681), all to sustain the authority of the ancient Benedictine charters that his order preserved. Mabillon’s sharpest critic was the Jesuit Barthelmé Germon, who wrote in 1703:

Bring me charters from public *tabularia*, or at least from [collections] that have been constantly protected from the perfidy of forgers; and then, if these lack flaws, offer *them*

as undoubted and demand that we recognize them as true (Germon 1703, 41).

In an administrative world where the exact words found in ancient documents mattered for the possession of estates and privileges, private possession of authoritative records evidently raised the specter of self-interested forgery, at least in the minds of these critics.

What seemed an intractable problem to public intellectuals around 1700, however, is an opportunity for historians today. Eighteenth-century families and institutions with lands and privileges that they wished to defend sought new ways to authenticate and legitimate the records they already held in their chests and treasure-rooms – as we see vividly in the discussions in this volume. Private records, though such efforts, could become private *archives*, repositories of proof as families struggled over property internally and externally (see Lodolini 1997, 39-51). Such efforts, moreover, inevitably followed the evolving grain of power and public administration wherever they were located, providing us today with rich evidence about the practices and deep structure of Europe’s evolving states in all their diversity. In Portugal, for example, the central importance of *morgadios* or entails spurred the emergence of the *tombo* as a distinctive genre of inventory, authenticated by the *Juiz do Tombo* who brought public authority to a family’s collected private records. The onset of the Napoleonic wars and the removal of the monarchs to Brazil, in turn, created

new incentives to use writing in place of face-to-face negotiation with the King and his court, generating new flows of records. Finally, the struggles between Liberal and conservative forces, and the eventual abolition of entails in 1863 again transformed the landscape for private recordkeeping.

Private and public in the making of archives

Records (as a distinct genre of writing) thus always connect individual and family interests with social power and authority. In the Roman and subsequent European traditions, the creation of public records – *instrumenta publica* with *fides publica* – represented a critical mediating idea that structured such connections, even as a complex landscape of notarial, monastic and noble collections of records emerged next to (and often in place of) actual public repositories. Indeed, the term ‘archive’ in the Western tradition was first used exactly for such non-public collections or treasuries, whether in the hands of royal families, monks, or simple villagers (e.g. Potin 2003). In its genealogy, then – at least in Western Europe – the idea of an archive as a hidden treasury directly contradicted the public nature of records as imagined in Roman law. At the same time, however, many practices of recordkeeping and especially record-using bridged this contradiction, since so much public power had also flowed from the *res publica* to families and corporate institutions. With

the emergence of European states and the key idea of ‘sovereignty’ (the public quality that set states apart from private authorities), establishing or re-establishing the public authenticity of families’ records once again became vital, and this process – as the articles in this volume demonstrate – led to new inventories and ultimately to entirely new understandings of records and their proper organization. By the twentieth century, the overwhelming claims of the new national administrative states overwhelmed the complex landscape of diverse repositories that had existed in the early modern period, ultimately transforming archives from the heart of any institution’s power into the dusty domain of historians (Bautier 1968; Friedrich 2013). ■

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Storytelling: Private papers versus official records in 18th and 19th-century Portugal

Ana Canas

Notions of private and public have varied through the years and among communities and cultures, and even inside them – including in the archival sphere. At the end of the 18th and beginning of the 19th centuries, many Portuguese central public offices, on behalf of the sovereign, sought to recover public records that were in possession of private persons. At the same time, various circumstances explain why private records, sometimes linked to family networks, were kept in the archives of public officials. The frontiers between public and private were sometimes tenuous.

1 Creation and use of private records in public offices

The scope of official duties resulting from the responsibilities of the *secretarias de Estado*, of the *Conselho Ultramarino* and, between 1808 and 1821, of the governors of the kingdom and secretaries in

Lisbon, led to the production of many documents whose nature was private, semi-official or not obviously public. Although there were no written rules for their use, it is often possible to pinpoint the contexts in which these documents were used. Some of them, or their copies and registers, remained in the archives of the public organisations that either received or sent them, while others became part of private archives.

The differences in their trajectories resulted from various causes: from differing contexts of use; from the value of their information content; from public offices' procedures for selection, which might be based on tradition (frequently at random), or derive from one or another written indication emanating from the monarch or his ministers and public authorities; and sometimes simply owing to chance.

1.1 Recommendations

When presenting a petition to the sovereign, including a nomination for a post in public administration, it was customary to seek patronage from an influential person. In parallel to the official petition, parallel patronage recommendations were frequently prepared in written form. Thus, in addition to the usual official documents, sometimes (in order to reinforce the petition) the petitioner himself or his patron sent further letters to the head officer through whom the initial petition was submitted to the monarch. We have searched for such occurrences in the archives of the *Conselho Ultramarino*,¹ of the *Secretaria de Estado dos Negócios da Marinha e Domínios Ultramarinos*,² of the *Secretaria de Estado dos Negócios do Reino*³ and of the *Secretaria de Estado dos Negócios Estrangeiros e da Guerra*.⁴

Increases in the distance of the Court from its subjects seem to have been a contributing factor to the production of such documents. In 1809, for instance, Francisco de Sampaio in Lisbon asked the Count of Aguiar, *secretário de Estado dos Negócios do Reino* and in attendance on the monarch in Brazil, for support for his petition. In a letter to Aguiar, he expressed his concern that Aguiar had not received the official petition. He also apologized for this, stating that he was used to presenting his needs to the sovereign in person.⁵

Such letters are on the borderline between public and private documents, and even recommendations issued by public officers were not recognised as being officially empowered. They were not treated as *ofícios* or *informações* resulting from the officers'

positions. Nevertheless, such letters were kept in the archives of the public institutions headed by the people who received them. At times, they were kept together with related documents in the same file, and in this way, they became part of public archives.

1.2 Private records seized during war and integrated into public offices' archives

In periods of conflict such as the Napoleonic occupation of Portugal, the records and archives of people who were, rightly or wrongly, presumed to be collaborators with the enemy were seized and sometimes integrated into official archives. The Count of Ega, Aires de Saldanha, was one of the most notorious Portuguese Napoleonic partisans; when his documents were seized during a process of confiscation, the purpose was to enable investigation followed by punishment. A similar process took place with the documents seized in 1811 by the British Army from the Count of Sabugal, D. Miguel Mascarenhas, who was a member of the Portuguese deputation sent under the orders of General Junot to Bayonne in February 1808. In April 1811, the representative of Great Britain in Portugal, Stuart, sent these documents to the Portuguese secretary of Foreign, War and Navy Affairs, Forjaz, so that the latter could inform the governors of the kingdom.⁶ The documents were then sent to Salter de Mendonça, the *secretário dos Negócios do Reino* who presided over the *Casa da Suplicação*, to be analyzed and eventually used in a judicial enquiry.⁷

1.3 *Private records in the context of foreign affairs*

Other kinds of private documents were frequently used while performing the duties of the *Secretaria de Estado dos Negócios Estrangeiros e da Guerra*. These documents have varied contexts, at times relating to protocol. This is the case for the private letter sent by Sousa e Holstein, representative of Portugal in Cadiz, to Forjaz, congratulating him on his nomination as secretary of Foreign Affairs.⁸ Another case in point is the private letter sent by Canning to the Portuguese secretary of Foreign Affairs announcing his arrival in Lisbon to take his post as British minister.⁹ He sent to Forjaz a letter with his official greetings only one week after his arrival. To arrange meetings between Canning and Forjaz, they also used private correspondence that followed the same protocol rules.¹⁰ In other circumstances, diplomats used private letters with the intention of keeping the contents of the correspondence confidential. This is what happened when Forjaz sent a letter clarifying the circumstances of his resignation to Stuart, Canning's predecessor.¹¹

Such private letters could also serve as delaying tactics before an official document was sent, while making a first approach. This was the case for the private letter sent by D. José de Sousa, diplomatic representative in London, in response to the first circular letter he received from Braancamp, caretaker of Foreign Affairs, after the 1820 Revolution in Portugal. In his letter, Sousa declined to establish communications with the new regime before receiving instructions from the king. The private nature of the letter thus represented

a gesture to keep his options open, for while not recognising the government in Lisbon, it did not preclude the possibility of doing so in the future.¹²

The use of private correspondence in the context of foreign affairs, often with a certain degree of reserve, was a procedure followed in other European countries, such as the United Kingdom. Among the correspondence from Stuart, British minister to Lisbon from 1810 to 1814, to William Hamilton and Marquis Wellesley, there are some letters classified 'Private' and not numbered in the same way the dispatches were.¹³

2 Public functions, family networks and private records

At times, family ties facilitated the production of private correspondence, which was then included in official documents in the course of public duties. This happened often with the three Sousa Coutinho brothers: D. Rodrigo, secretary of state; D. Domingos, a diplomat; and José, Principal Sousa, governor of the Kingdom. On more than one occasion, D. Rodrigo reported to the monarch the contents of their private letters.¹⁴ But the brothers also wrote private and semi-official letters directly to the monarch. A series of these letters from Principal Sousa, dating from 1810 to 1817, can be identified in the archive of the *Secretaria de Estado dos Negócios Estrangeiros*¹⁵ and in the archive of D. João VI's Cabinet¹⁶; they are completed by the letter books kept in the archive of one of the branches of the Sousa Coutinho family.¹⁷ Sousa expressed his

confidential opinions to the monarch, including about the war; he also enclosed copies of private letters that he received from military men. Even when they were not placed in the archives of public offices, some of these private papers were extracted and used by those offices.

3 Features of private letters

Private letters exchanged between people carrying out public duties in Portuguese administration and government presented certain features that distinguished them from official documents. Some letters were clearly classified as private, usually with a mark at the top of the folio 1r. Their dimensions were often smaller, as well. The formulae used in the address and in the final greeting, in contrast, were often identical to those appearing in official documents. For instance: ‘Illm^o e Exm^o Senhor / Queira V. Ex^a dar-me as suas ordens e acreditar os sentimentos de respeito com que tenho a honra de ser. De V^a Ex^a/ mais atento e fiel servidor / Conde de Palmela’ (*Illustrissimo* and *Excelentissimo* Sir / Your Excellency, please give me your orders and accept the feelings of respect with which I have the honour of being / Of Your Excellency / most attentive and faithful servant / Count of Palmela).¹⁸

Proximity between the author and the addressee could change these formulae: ‘Meu Irmão. Do meu Coração / Estimarei a tua boa saude e que acredites o quanto te amo do Coração. Irmão. E amigo. José.’ (My Brother. From my Heart / I will value your good

health and that you believe how much I love you from my Heart. Brother. And friend. José).¹⁹

The closing procedure of private letters was generally different from public correspondence. They were to be closed with a pointed fold, and when sent by the Portuguese king to another monarch, they were wax sealed with the small seal of the Royal Coat of Arms.²⁰

4 Public records and private holders exerting public functions

As far as documents accumulated during the exercise of public duties were concerned, when an officer relinquished a position, the Portuguese central administration sought to safeguard the records considered public in order to guarantee administrative and political continuity. The risk was that the ministers and various officials or their families would keep public records in their own collections, a practice common in other European countries as well. Rodrigo Navarro de Andrade, Portuguese minister plenipotentiary in Vienna, told his brother about an episode concerning the records of Hudelist, who managed foreign affairs for Austria during the absence of Prince Metternich. When Hudelist died, his wife gave to Andrade the keys to the pieces of furniture where his papers were kept. Though embarrassed owing to his status as a foreigner, Andrade went to the Chancery, where the officers unwrapped the keys and sealed the furniture with the seal of the Chancery and with his signet. The cabinets and the drawers with the records were

to be opened in the presence of a civil servant in order to attend to the separation of the records, and to check whether any government records were present.²¹

In some circumstances, scrutiny for public documents took place not only in the document cabinets of the heads of departments, but also in their domestic areas, where, frequently, public affairs had been dispatched. I will mention several cases.

In 1799, following José Seabra da Silva's sacking from the office of *secretário de Estado dos Negócios do Reino* by the Prince Regent D. João, the question of the documents in his possession arose. Given the political seriousness of the situation, it was the Prince Regent himself who recommended to the Marquis de Ponte de Lima, who was da Silva's interim substitute, to take charge without delay of the *Secretaria de Estado* and all the documents concerning the King's service, and also to search da Silva's house for papers to be seized.²²

Following the death and replacement of D. Rodrigo de Sousa Coutinho, Count of Linhares, in the *Secretaria de Estado dos Negócios Estrangeiros e da Guerra*, the Count of Galveias, *secretário de Estado dos Negócios da Marinha e Domínios Ultramarinos*, interceded with the Prince Regent in order to facilitate the sorting out of private papers that belonged to Linhares.²³

The archives of the legations of Portugal abroad were particularly subject to such contingencies upon the replacement of their officials, which often represented a threat to the integrity of the archives. Most diplomats kept various documents, and in certain

circumstances, some even took possession of the entire archives when their term of duty ended. However, within the *Secretaria de Estado dos Negócios Estrangeiros*, the practice developed of gathering all official documents held by those diplomats or their families.

The archive of the Legation in Rome suffered from true dilapidation, which has not yet been completely explained. Pedro de Melo Breyner, who in 1818 replaced D. Domingos de Sousa Coutinho, Count of Funchal, in that legation, gave us a desolate picture of the situation. He had assumed that Figueiredo, *chargé d'affaires* in Rome, and J. Th. Wys, private secretary to the Count of Funchal, would pass the archive on to him with the corresponding inventories. But D. Domingos Sousa Coutinho ultimately kept various official documents, including original despatches from the *secretário de Estado dos Negócios Estrangeiros e da Guerra*, which are today spread among various repositories. Although Breyner implied that his predecessor had been careless with the archive of the legation, he also considered that the disarray of documents 'had a long precedent'. Someone had informed him that Francisco de Almada, Portuguese minister to Rome from 1756 to 1779, had taken the archive with him between 1760 and 1770, when the relations between Portugal and the Holy See had broken down. However, those documents could not be found in the *Secretaria de Estado* in Lisbon,²⁴ and Breyner considered both the missing records and the disarray among the records that were preserved as a disgrace in his career.

The archive of the legation in Paris came also under the scrutiny of Portuguese officials. In 1819, part of that archive was the object of re-arrangement, with a view to separate public from private documents. The archive consisted primarily of documents accumulated by D. Vicente Sousa Coutinho, Portuguese representative in Paris from 1763 until 1792. Branco, official of the *Secretaria de Estado*, was charged with the task of delivering to the diplomat de Brito the documents that belonged to ‘the diplomatic service’. But the examination and classification of the documents was not an easy task. As Branco wrote, these papers ‘não se amanhã em trinta dias’ (‘will not be arranged in thirty days’ time’). Those that belonged to the Court had to be separated from those belonging to D. Vicente’s heirs and to the Casa de Alva, whose head was a son from D. Vicente’s second marriage.

When in 1823 the Marquis of Marialva, ambassador in Paris since 1814, died in turn, his archive was sealed in order to enable the separation of public and private documents. Meanwhile the government ordered the attachés José Inácio da Cunha Cândido and Francisco d’Alpuim de Meneses to hand in any documents existing in the embassy office, which were not part of the body of sealed documents.²⁵ Francisco José Maria de Brito succeeded Marialva temporarily in the post; when he received these non-sealed documents, he did not fail to notice the absence of many official documents.

A somewhat different situation occurred with D. Miguel Pereira Forjaz, *secretário dos Negócios Estrangeiros e da Guerra e*

dos Negócios da Marinha between 1808 and 1820 in Lisbon (already discussed above), who kept in his private archive various registers and copybooks of documents created during his tenure in official duties.²⁶ He also kept documents seized from the French in 1808 and referenced in the archive of the *Secretaria de Estado dos Negócios do Reino* by its bookkeeper, Rolim.²⁷

Further evidence of official records in the hands of private persons can be found while browsing the series *Secretaria* of the *Conselho Ultramarino*, where we find several records (*portarias*, lists, inventories) that describe the delivery of archives (*cartórios*) related to different posts such as councillor or scrivener when individuals ceased carrying out these functions.²⁸

5 The archives of public central offices and the classification of records as private

In the various finding aids for controlling and retrieving documents and their contents that were drawn up at the time for the *Secretaria de Estado dos Negócios do Reino* and the *Secretaria de Estado dos Negócios Estrangeiros*, we find that they do not indicate the private nature of some of the documents involved. The public character of the archives in question was uppermost; as a result, noting the private nature of specific documents would add nothing important for the purposes of the offices. In two finding aids carried out in 1808 and 1812 in the *Secretaria de Estado dos Negócios do Reino*, the only relevant reference alluded to the letters of ‘private persons in

the course of their duty' in the division called 'different papers'.²⁹ Similarly, the *Inventário Geral do Arquivo da Secretaria d'Estado dos Negócios Estrangeiros*, initiated in 1828, only exceptionally classified documents as being private.³⁰

The official records kept in the archives of the Portuguese central offices, including those related to the colonial administration, do not often echo daily lives, personal feelings, minority behaviours or the voices of indigenous communities. But as we have seen, these public offices' archives include various records created by private persons – some of which enclosed the official ones, and some parallel to them – that, even when classified by their creators as private, may not appear as such in contemporary or modern finding aids. However, if properly identified and contextualized, these records might tell a different story. ■

Notes

¹ Letter from the capitão mór of Bragança Salvador de Mello da Silva to the escrivão of the Conselho da Fazenda Afonso de Barros Caminha, requesting his protection and recommendation to be appointed to any ruling post of the overseas dominions or other vacant post, owing to his difficult financial situation. Lisbon, March 1642. AHU, CU, Reino, Cx. 10-B, pasta 13.

² Letter from Sebastião de Sá e Melo to Dr. António Barreto de Castilho, confiding his "empenho" (effort) to favour him during the next bachelors' dispatch, Lisbon, 12 May 1759. AHU, CU, Reino, Cx. 356, pasta 23.

³ Letter from João António Salter de Mendonça to the Count of Aguiar, secretário de Estado dos Negócios do Reino, requesting for his favour to be appointed keeper of the Royal Archive of Torre do Tombo, Lisbon, 24

July 1813; and minute of answer from the Count of Aguiar, ANRJ, NP, cx. 644, pac. 1, 14. Letter from the Count of Peniche, governor of the Kingdom, to Tomás António de Vilanova Portugal, secretário de Estado dos Negócios do Reino in favour of José Carlos Xavier da Silva, Lisbon, 26 February 1818, ANRJ, cx. 702, pac. 1, 113, f. 13r.

⁴ Letter from D. Miguel Pereira Forjaz, secretário dos Negócios Estrangeiros e da Guerra, to the Marquis of Aguiar,

secretário de Estado dos Negócios Estrangeiros e da Guerra, in favour of Caetano José Peixoto, Lisbon, 14 de Abril de 1816, ANRJ, NP, cx. 686, pac. 2, 1.

⁵ Letter of Francisco Xavier Ribeiro de Sampaio to the Count of Aguiar, Lisbon, 14 December 1809, ANRJ, NP, cx. 632, pac. 1, 18.

⁶ Extract of note from Stuart to Forjaz, 14 April 1811, ANTT, MNE, liv. 133, f. 125v.

⁷ Register of aviso from the governors

of the Kingdom, Palace of the Government, 22 April 1811, ANTT, liv. 42, f. 36v-38v.

⁸ Extract of letters from Sousa e Holstein to Forjaz, 18 and 24 November 1809. ANTT, MNE, liv. 134, f. 12r.

⁹ Extract of letter from Canning to Forjaz, 2 December 1814, ANTT, MNE, liv. 133, f. 273r.

¹⁰ Extract of letter from Canning to Forjaz, 19 Junho 1815, ANTT, MNE, liv. 133, f. 288r.

¹¹ Extract of note from Stuart to Forjaz, 19 July 1811, ANTT, MNE, liv. 133, f. 146v.

¹² Correspondência ostensiva e reservada de D. José Luís de Sousa, August 1820-April 1821, AHI, estante 338, prateleira 2, vol. 5.

¹³ TNA, FO 63/92, f. 271r and others.

¹⁴ Letter from José to his brother Rodrigo, Lisbon, 13 August 1811, ANRJ, Gabinete D. João VI, mç. 3, 120.

¹⁵ Letters from Principal Sousa to the Prince Regent D. João, 1810, ANTT, MNE, cx. 12, mç. 6

¹⁶ ANRJ, Gabinete D. João VI, mç. 7, 454 and mç. 8, 460.

¹⁷ Secret letter books from Principal

Sousa to HRH, vol. 1, 8 August 1810-20 September 1813; and vol. 2, 1 October 1813-7 August 1817. Arquivo da Família Linhares (AFL) in Cascais, microfilmed at the Filmoteca Ultramarina Portuguesa (FUP). See AHU, FUP, R-9, 1, 1, vol. 1. A few drafts of these letters are in the Instituto Histórico e Geográfico Brasileiro, Rio de Janeiro, IHGB, DL 394.6.

¹⁸ Letter from the Count of Palmela to the Count of Galveias, London, 10 November 1813, ANRJ, Gabinete D. João VI, mç. 5, 401.

¹⁹ Letter from José to his brother, Lisbon, 13 August 1811, ANRJ, Gabinete D. João VI, mç. 3, 120.

²⁰ Minute of letter from Prince Regent D. João to the King of the Two Sicilies, Palace of Queluz, 4 April 1800; and folder, ANRJ, NP, cx. 728, pac. B, pac. 2.

²¹ Letter from D. Rodrigo Navarro de Andrade to his brother João Navarro de Andrade, Baron of Sande, Vienna, 12 November 1818, ANTT, MNE, cx. 947, 8.

²² Minute of letter from D. João to the Marquis, [August 1799], ANRJ, NP, cx. 728, pac. B.

²³ Dispatch from the Count of Galveias to the Count of Linhares, Botafogo, 31 January 1812, BNRJ, CL, I-29, 19, 12, no. 1.

²⁴ Letter from Pedro de Melo Breyner to the Count of Funchal, Rome, 12 November 1819, BNRJ, CL, I-29, 17, 18.

²⁵ 'Descrição dos papeis existentes na Secretaria da Embaixada de Sua Magestade Fidelissima em Paris que se não acham submetidos aos selos postos no espolio do Exm^o Marquez de Marialva', Paris, 3-9 January 1824, ANTT, MNE, cx. 38, mç. 25, doc. 4-6.

²⁶ 'Diário das ordens expedidas pela Secretaria de Estado dos Negócios Estrangeiros e da Guerra desde o dia 19 de Setembro até ao fim de Dezembro de 1808', BNP, ALB, Núcleo da Av. de Roma, pac. 111, 179; 'Diário dos avisos e mais ordens que se expediram pela Secretaria de Estado dos Negócios Estrangeiros e da Guerra. 1812', BNP, ALB, Núcleo do Recolhimento da Encarnação, pac. 37, liv. 43; register of correspondence from the governors of the Kingdom, 1818-1820, BNP, ALB, Núcleo do Recolhimento da Encarnação, pac. 24, liv. 12; register of *ofícios de expediente* from Brazil, 2 January 1809 to 17 May 1820, BNP, ALB, Núcleo Av. de Roma, pac. 96, 138.

²⁷ Maço 5 macetes 2 and 4, maço 7 and maço 13 macete 12, of the list of Rolim,

nowadays at BNP, ALB, Núcleo da Av. de Roma, pac. 105, 163.

²⁸ Portaria from the Conselho Ultramarino ordering to the meirinho scrivener to enjoin Leitão de Vasconcelos scrivener of the Tesouraria and Executoria to inventory and deliver all the books, files and papers. Lisbon, 23 January 1781. AHU, CU_089, Cx. 8, D. 755.

²⁹ 'Sistêma que regula a divizão e colocação dos Papeis do Archivo desta Secretaria de Estado dos Negocios do Reino...' ANTT, MR, liv. 2560. 'Catalogo dos livros de Registo desta Secretaria de Estado dos Negocios do Reino (...) Rollim' ANTT, MR, liv. 2561, f. 30v.

³⁰ When referring to records of the Portuguese legation in France there is a mention of '*cartas particulares*'. ANTT, MNE, liv. 192, f. 109r. These letters are certainly from Francisco Mendes de Góis, sent to Paris in 1736 by King D. João V, ordering him to buy silverware and other luxury objects. ANTT, MNE, cx. 927.

Recherches croisées sur les inventaires des titres de famille des Foix-Béarn-Navarre (XV^e-XVII^e siècle)

Véronique Lamazou-Duplan,
collab. Anne Goulet, Philippe Chareyre, Alvaro Adot

Une belle série d'inventaires anciens des titres des Foix-Béarn-Navarre est conservée aux Archives départementales des Pyrénées-Atlantiques. Un projet, toujours en cours, s'attache à transcrire et à étudier ces registres, à alimenter une base de données qui établira à terme la traçabilité des pièces d'archives, de leur description d'inventaire en inventaire, de leurs cotes successives, parfois jusqu'au document encore conservé¹.

Ces inventaires de la famille royale de Navarre sont précieux à plus d'un titre. Ils permettent d'éclairer à la fois la genèse des archives des Foix-Béarn-Navarre et de familles alliées

(par exemple les Albret) tout en mettant en lumière ce qui fait la spécificité des archives départementales des Basses-Pyrénées, devenues Pyrénées-Atlantiques: «le petit Trésor des chartes de Pau», en référence au Trésor des chartes des rois de France à Paris. En effet, si certaines pièces ont été, notamment sous Louis XIV, transférées à Paris, en particulier depuis le château de Foix, la majeure partie de la documentation est restée à Foix et au château de Pau, conservée dans différents dépôts jusqu'à ceux des archives départementales. A Foix ou à Pau, les archives des Foix-Béarn-Navarre ont cependant subi de graves dégradations dues aux

destructions des temps révolutionnaires (en particulier à Foix) ou à de mauvaises conditions de conservation: ainsi, au XIX^e siècle, Prosper Mérimée envoyé à Pau pour inspecter les archives alors gardées dans le donjon du château, décrit des brouettes de documents rongés par les rats ou l'humidité; enfin, au début du XX^e siècle, des incendies dans les dépôts détruisent, à Foix, les archives des comtes de Foix et, à Pau, certaines séries, épargnant en revanche la quasi-totalité des titres de famille de la famille royale de Navarre encore conservés, d'où ce fonds très riche malgré parfois un mauvais état qui nécessite des restaurations, opération aujourd'hui en cours.

On comprendra donc d'emblée que la transcription et l'étude de ces inventaires présentent à la fois un intérêt historique (leur contenu) et un intérêt archivistique (leurs formes, diverses en fonction des contextes et des objectifs qui ont présidé à leur réalisation, des formes archivistiques qui évoluent au cours du temps, entre XV^e et XVII^e siècle). Ces inventaires peuvent révéler en effet nombre de documents aujourd'hui perdus voire, lorsque les analyses des pièces sont détaillées, pallier les lacunes documentaires, renouveler la matière historique. Sur le plan archivistique, ils sont des objets d'étude en soi qui aident à cerner l'histoire des archives des Foix-Béarn-Navarre (genèse et évolutions de ces dépôts d'archives), la culture de l'écrit, les pratiques de l'archivage et des archivistes de Foix-Béarn-Navarre. Nous livrons ici quelques réflexions à la lumière des résultats et pistes d'un *work in progress*, de façon très synthétique en raison

du format de cette publication (LAMAZOU-DUPLAN, ADOT et CHAREYRE, 2014; GOULET et PEBAY-CLOTTES, 2014).

Cette série d'inventaires anciens (plus d'une vingtaine entre XV^e et XVII^e siècle², les plus anciens conservés, ceux des titres conservés au château de Foix datant de 1403 et 1405) est d'autant plus rare qu'elle a été réalisée pour une «même famille» aristocratique: d'abord celle des Foix-Béarn (le comté de Foix et la vicomté de Béarn sont réunis sur la même tête à partir de la fin du XIII^e siècle), qui ont des alliances familiales, politiques et des possessions des deux côtés des Pyrénées; puis ces princes puissants (on pense ici à la principauté de Gaston III dit Fébus (1343-1391) (TUCOO-CHALA, 1959; LAMAZOU-DUPLAN, 2014) et de ses successeurs) se hissent au XV^e siècle au rang de famille royale, lorsque les Foix-Béarn alliés aux Albret sont aussi rois de Navarre³. En 1512, lorsque Ferdinand le Catholique pénètre en Navarre, les rois de Navarre, Catherine de Foix et son époux Jean d'Albret, se réfugient à Pau. Ils conservent leur titre de «rois de Navarre», une Navarre désormais réduite à la Basse-Navarre; mais on le sait, la postérité de ce titre demeure : leur petit-fils Henri III de Navarre devient le fameux Henri IV «roi de France et de Navarre», ce titre restant associé à la titulature des rois de France jusqu'à la veille de la Révolution.

Certains de ces inventaires sont connus des érudits depuis longtemps: lorsque des campagnes de copies de pièces tirées des

châteaux de Foix, de Pau, de Nérac, ou autres, sont lancées aux XVII^e et XVIII^e siècles, Doat puis Baluze et Duchesne s'appuient sur certains inventaires des différents chartriers; parmi ces registres, un inventaire du milieu du XV^e siècle est fameux, mais toujours cité seulement pour sa belle chronique des comtes de Foix qui couvre les 26 premiers folios d'un registre monumental qui compte 334 feuillets (BIU, 2003) ; l'inventaire des années 1680, facile à lire, est encore consulté par les chercheurs (ADPA E 2). Mais la plupart et les plus anciens de ces inventaires sont demeurés dans l'ombre des boîtes et des rayonnages, parfois difficiles d'accès en raison de leur état, de l'obstacle de la paléographie ou de la langue (latin, langue d'oc...), et donc inédits, très mal cernés et jusqu'à présent jamais étudiés en soi. Enfin, ces registres n'ont pas attiré jusqu'il y a peu l'intérêt des chercheurs car jugés comme peu fiables face aux descriptions méthodiques des archivistes professionnels contemporains.

Ces inventaires apparaissent dans les différentes rubriques du cadre de classement des fonds hérité du XIX^e siècle, qui n'est pas celui des archives et des archivistes anciens à l'œuvre dans les différents dépôts des domaines de la famille royale de Navarre... Ces inventaires anciens donnent donc les clefs d'une possible archéologie documentaire et archivistique.

L'entreprise a par exemple déjà été tentée, quasiment comme un sondage archéologique pour la rubrique *Navarre* du plus ancien inventaire des archives du château de Pau (ADPA IJ 290, daté de 1533, soit vingt ans après que les rois de Navarre eurent

quitté Pampelune, emportant vraisemblablement avec eux des archives à Pau et souhaitant probablement dresser un état des lieux du dépôt palois...). Cette rubrique *Navarre* a été étudiée dans le détail, pour son contenu grâce à l'analyse des pièces inventoriées, de même que pour son système de description et de cotation (doubles lettres, morceaux de prières...). Elle a aussi été mise en correspondance avec les fonds aujourd'hui conservés à Pau (Archives départementales des Pyrénées-Atlantiques) et à Pampelune (Archivo General y Real de Navarra) (GOULET et HERREROS LOPETEGUI, 2012).

Sur un autre plan, la comparaison effectuée peu à peu (travail en cours) entre les différents inventaires établis au fil du temps soulève de multiples questions. Ainsi, par exemple, pourquoi au XVI^e siècle n'a-t-on pas pris en compte des documents médiévaux, qui existaient pourtant et que l'on retrouve cités dans les inventaires de la fin du XVII^e siècle? Cela renvoie à la question de ce que l'on inventorie ou pas, dans le contexte particulier de la réalisation de tel ou tel inventaire et pour des enjeux bien spécifiques (par exemple pour le registre de 1533 ou pour celui du tournant XVI^e-XVII^e siècle⁴).

Le travail des «archivistes» peut être examiné de près. Et d'abord, qui étaient-ils? Des noms et des titres signalent des compétences particulières dans le domaine de l'écrit (notaires, hommes d'Eglise, juristes, officiers...), voire une expertise (lorsqu'un même homme a la responsabilité de la réalisation de

plusieurs inventaires⁵), des bribes de carrière émergent çà et là. Au XVI^e siècle, la responsabilité des inventaires est confiée à de hauts personnages, proches du prince, comme pour mieux souligner l'importance de cette opération qui est liée à la haute administration, au bon gouvernement ou à des différends judiciaires.

Les lieux et les conditions matérielles de l'archivage sont interrogés. Les comtes de Foix-Béarn, puis les rois de Navarre, ont des possessions morcelées, donc des dépôts d'archives dispersés, dans des châteaux importants (à Foix, Castelbon, Orthez, Pau, Nérac...), lieux emblématiques de leur pouvoir au sein desquels les chartriers sont gardés. La dispersion des chartriers n'est pas pour autant synonyme de désorganisation: la rédaction des inventaires en témoigne et des indices glanés dans ces registres laissent penser à une organisation antérieure à celle des premiers inventaires et classements conservés. D'autre part, de multiples mentions font entrevoir la matérialité de l'archivage et de ces dépôts: pièce dédiée, coffres, sacs, armoire construite au moment où un inventaire est réalisé, subdivisée en caisses et layettes... Les inventaires distinguent d'ailleurs ce qui est désormais classé et rangé dans ces meubles de ce qui est laissé en vrac, ou dans des coffres qui peuvent suivre le prince. Le Trésor des chartes princier naît et se différencie ainsi de la documentation qui sert aux affaires courantes. Pourtant, malgré les tentatives réitérées de mises en ordre, les archives sont toujours décrites «en grand désordre» lorsque l'on refait et justifie un nouvel inventaire...

Justement, d'un inventaire à l'autre, les classements et les reclassements des titres éclairent les modalités de conservation mais aussi de transmission des archives. Pourquoi et comment refait-on un inventaire? L'opération est en effet importante, réalisée à plusieurs décennies d'écart (un à deux inventaires par siècle dans notre cas, avec parfois des copies intermédiaires), à tel point que l'on peut parler de générations d'inventaires⁶ au-delà des différences formelles qui renverraient à des fonctions diverses (voir *infra*). L'étude détaillée de quelques inventaires démontre que, s'ils sont complétés un temps par des ajouts et compléments sur les folios laissés en blanc, ils ne suivent plus ensuite l'accroissement des archives et deviennent obsolètes... Plutôt que de les mettre à jour, on semble alors préférer les refaire en réorganisant le chartrier tombé «en grand désordre», ce qui peut aussi se justifier par un contexte précis (politique, judiciaire...) qui ajoute à la nécessité de confectionner un nouvel inventaire. Ce type de situation peut aussi expliquer pourquoi certaines pièces sont inventoriées et d'autres laissées dans le silence, parfois un temps seulement, répondant à la question posée plus haut. Les inventaires ne sont certainement pas exhaustifs et les pièces inventoriées acquièrent une nouvelle dimension (elles sont utiles, mémorables...), à un moment donné ou de façon constante.

Outre les questionnements classiques sur la répartition des pièces inventoriées, une grande attention est portée à la façon de décrire les pièces (avec un vocabulaire très précis), de les inventorier, de les classer, de les coter (les différents systèmes

de cotation, en correspondance avec les analyses dorsales et les cotes successives portées sur les pièces conservées). D'autre part, certains inventaires portent des annotations qui révèlent leur maniement et usage: mouvements de pièces (intégrations, retraits, restitutions), ou bien traces de récolement⁷... Ce qui ouvre aussi la question de l'ouverture et de la fermeture de ces archives, de leur contrôle, dans ce cas toujours au bénéfice du prince.

Quelles étaient les fonctions de ces inventaires? Certains de ces registres sont des instruments de travail pour l'entourage du prince et pour le prince lui-même qui a ainsi sous la main l'état des lieux de son chartrier: le plus ancien inventaire conservé (Foix, 1403, ADPA E 391) est réalisé en deux exemplaires jumeaux, que l'on devra ensuite mettre à jour l'un vis-à-vis de l'autre; l'un doit demeurer dans le chartrier de Foix, l'autre sera «devers Monseigneur le comte». Près de cent cinquante ans plus tard, la même procédure est observée pour l'inventaire des titres du château de Nérac: un exemplaire reste sur place tandis que l'autre est destiné à Henri II de Navarre (ADPA E 14). D'un format pratique, ces volumes sont consultés, annotés et marqués dans les marges et les interlignes. D'autres, en revanche, sont clairement des registres de prestige comme le prouvent leur format peu maniable (*in folio*), leur mise en page soignée, la belle calligraphie des titres et des articles, l'insertion d'un prologue voire d'une chronique qui chapeautent le registre. La geste des comtes de Foix, en prose et en vers, ouvre ainsi le magnifique registre d'inventaire

des titres conservés à Foix au milieu du XV^e siècle; elle sert de préambule généalogique faussement unificateur (gommant les ruptures généalogiques) et historique à l'inventaire qui suit. On s'y applique à *far memoria*, en remémorant les exploits, les *gesta*, mais en oubliant les épisodes malheureux ou en taisant ce qu'il faut taire. Les documents ensuite inventoriés sont ainsi mis en perspective, procurent les armes pour défendre les droits du comte et les gisements documentaires d'un bon gouvernement, d'une certaine mémoire. Des indices glanés dans les registres d'inventaires d'archives conservés et dans les fonds prouvent d'ailleurs qu'ils intégraient de plus larges ensembles d'objets précieux et symboliques: ils coexistaient avec d'autres inventaires d'archives antérieurs, perdus pour nous mais mentionnés, mais aussi avec des inventaires des meubles, des objets précieux, des livres... Les inventaires, au même titre que les archives de famille, peuvent donc être considérés à la fois comme un trésor, un arsenal, un mémorial, en concentrent ces vertus (CONTAMINE et VISSIERE, 2011; LAMAZOU-DUPLAN, ADOT et CHAREYRE, 2014).

Les inventaires des titres de la famille royale de Navarre, telle qu'elle est définie ici, sont donc des objets et des sujets d'étude privilégiés pour retracer l'histoire des archives et de l'archivage des Foix-Béarn-Navarre, mais aussi pour interroger le lien entre archives, administration des domaines, défense des droits, construction d'une histoire et d'une certaine mémoire.

Ces registres, aux formes et aux usages divers, permettent aussi de retracer comment et selon quels enjeux ces dépôts multiples étaient organisés et décrits avant le cadre de classement actuel, hérité du XIX^e siècle, retrouvant ainsi la genèse de ces «fonds», leurs évolutions, leur transmission. Les inventaires sont surtout les premiers témoins, essentiels, au sens le plus fort, de la façon dont ces documents sont justement devenus archives, décrits comme tels, archives de famille et de l'Etat, sous la houlette de praticiens de l'écrit qui mettaient leur plume et leur conscience de l'archive au service du prince. ■

Notes

¹ Ce projet palois est mené par les médiévistes et modernistes du laboratoire ITEM (EA 3002) de l'Université de Pau et des Pays de l'Adour en collaboration étroite avec les Archives départementales des Pyrénées-Atlantiques. Il est aussi à l'initiative du programme ARCHIFAM porté par la Casa de Velázquez (Madrid) sur les «Archives de famille en péninsule Ibérique (XIII^e-XVII^e siècle». ARCHIFAM (2013-2015), coordonné sur le

plan scientifique par V. Lamazou-Duplan, regroupe les chercheurs et laboratoires des universités de Pau et des Pays de l'Adour (UPPA), publique de Navarre (UPNA), du Pays Basque (UPV), Nouvelle de Lisbonne (UNL), de Gérone (UdG). Les chercheurs de l'UPPA, investis sur la question des inventaires anciens d'archives, sont donc particulièrement heureux d'être associés au programme Invent.arq (FCT, 2014-2015, dirigé par Maria de Lurdes Rosa) et à cet ouvrage à

travers cette brève présentation de leur travail d'équipe.

² Inventaires des titres conservés au château de Foix: 3 registres de 1403 au milieu du XV^e siècle (ADPA E 391, E 392, E 393); du château de Pau 10 registres de la fin du XVI^e siècle à la fin du XVII^e siècle (ADPA 1J 290, E1 à E9); pour les Albret, 3 inventaires des titres et des domaines de 1493 au XVII^e siècle (ADPA, E 13, E 14, E 15), auxquels on ajoute les registres d'inventaires des titres des familles alliées (par exemple Périgord, voir notes 3 et 5, E 600 à E 603, E 606 à 607, du XVI^e siècle), des inventaires postérieurs conservés à Foix (2 registres du milieu du XVIII^e siècle) ou à Paris (par exemple, l'inventaire Dupuy).

³ Gaston IV, comte de Foix et vicomte de Béarn, a épousé Léonore de Navarre, leurs descendants unissent sur leur tête domaines des Foix-Béarn et royaume de Navarre. Le mariage de Jean d'Albret et de Catherine de Foix-Béarn en 1484

unit encore deux puissantes familles et de vastes possessions: la dot de Catherine est constituée du comté de Foix et de la vicomté de Béarn, du comté de Bigorre, des vicomtés de Marsan, Gavardan, Nébouzan et Lautrec, ainsi que du royaume de Navarre. Jean seigneur d'Albret, est aussi héritier des comtés de Périgord et de la vicomté de Limoges.

⁴ ADPA 1J 290 (étudié en détail par Alvaro Adot), E 1 (nouvelle datation proposée par Philippe Chareyre, 2014).

⁵ Par exemple, ADPA E 391 et 393: Bertrand curé de Bonnut en Béarn est chargé des inventaires des titres du château de Foix et de Castelbon (1403 et 1405); E 391 Michel de Bernis, notaire, scribe du registre, est quelques décennies plus tard l'archiviste et le chroniqueur du comte de Foix dans E 392 (études en cours de Véronique Lamazou-Duplan). Autre exemple : Jean de Fabri évêque d'Aure et Adémar Musnier conseiller d'Henri II

de Navarre, sont chargés des inventaires de titres aux châteaux de Nérac et Casteljaloux (1544) ainsi qu'au château de Montignac (1546) ADPA, E 14 et E 607).

⁶ Deux inventaires des titres du XV^e siècle, ADPA E 391 (Foix, 1403) et 393 (Castelbon, 1405) sont établis dans le même esprit, format, usage; quarante ans plus tard, E 392 appartient pour ces trois points à une autre génération d'inventaire (études en cours de Véronique Lamazou-Duplan). Il en va de même au siècle suivant pour les trois inventaires réalisés à la demande de Henri II de Navarre dans les années 1530-1540 (ADPA, 1 J 290: Pau; E 14: Nérac et Casteljaloux; E 607: Montignac).

⁷ Exemples étudiés dans ADPA E 391 (Véronique Lamazou-Duplan) et ADPA E 1 / E 2 (Philippe Chareyre).

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Documents' paths into the inventories of the House of Belmonte's archive

Maria João da Câmara Andrade e Sousa

As is the case for many other noble families in Portugal, the Figueiredo family history speaks of a mythical origin in the so-called “Reconquista”, when a hero named Guesto Ansur saved six ladies from the enemy at a place called *Figueiredo* (a fig tree orchard). Another version has it that, to save these ladies, he picked a branch of a fig tree (*figueira*) after his weapons had broken (SOUSA 2007, 178-179). Historically, however, we find mentions of the family only much later, in the late medieval royal registers and in literary works such as *Vida e Feitos d’El rey Dom João II* or *Monarchia Lusitana*, to mention just a few. We find males of this lineage occupying military posts from the 13th to 16th centuries and, as we reach the 15th and 16th centuries, we see them near kings Afonso V, John II and Manuel I, sometimes as military men and diplomats, but mainly as bureaucrats and financial experts – like Henrique de Figueiredo and his son, Rui de Figueiredo, who inherited his father’s post as “escrivão da Fazenda.” (SOUSA, 2007, 41;45).

As far as the family archive is concerned, this was the lineage that produced and accumulated the documents that became the basis of the House of Belmonte’s archive. The Figueiredo family held

these administrative posts throughout the 16th century, until Rui de Figueiredo Correia participated in the battle of Alcácer-Quibir, where he died, “increasing the honor” of his house’s descendants (MONTEIRO 2003 p. 93). From that moment on, the male heirs of the family played active roles (sometimes leading roles) at several crucial moments of Portugal’s history: at the Baía battle in 1625 (“Jornada dos Vassalos”), at the revolution of December 1 in 1640 and the following war, and during the War of Spanish Succession at the beginning of the 18th century. The role of several heads of the family, including Rui de Figueiredo de Alarcão (b. ca. 1595-1600; d. 1679) and later his son Pedro de Figueiredo (b. 1657; d. 1722), in these events allowed the lineage to become closer to the royal family. The matrimonial alliance of Rui de Figueiredo de Alarcão with Margarida de Meneses (1655), who belonged to the Cabral Family, brought, two generation later (after a litigious case in court) the inheritance of a very important entailed estate on 17 February 1777: the House of Belmonte (SAMPAYO, 1971, p124). On 18 May 1805, the title of Earl of Belmonte was awarded to Vasco Manuel de

Figueiredo Cabral da Câmara (ANTT, R.G.M., D. João VI, lv. 61, fl. 325). In fact, Vasco Manuel was a childhood friend of the future king John VI, and became *porteiro-mor* (ceremonial porter of the royal chamber) beginning in 1802 (ACBL, cx.15, nº64). He also served as the king's councilor from 30 May 1804 (ACBL, cx.15, nº67), and held significant posts as president of the Tobacco Court from 1801 (ACBL, cx.55, nº109) and deputy of the *Junta dos Três Estados* from 1804 (ACBL, cx.15, nº67; ANTT, R.G.M., D. João VI, Liv.5, fl.139 vº).

The upward mobility of the Figueiredo lineage was supported not only by the growing importance of its matrimonial alliances but also by patrimonial accumulation, enabled by the system of inheritance through *morgadios* (entailed estates), and largely traced in its archive. We must not forget that complete information on estates, incomes, and revenues was as important to social reproduction as a lineage's memory – its deeds, values and honor. The Figueiredo properties' accumulation underlay the growing importance of records and recordkeeping, necessary to prove the ownership, rights and privileges of the family. In the case of the House of Belmonte's archive, we can observe documents accumulating from the 16th century, and at a higher rate in the following centuries, by analyzing two major inventories: *Tombo de 1722*, (ACBL, cx.47, nº1) and *Tombo de 1807* (ACBL, Liv. 51; liv. 52).

In the Iberian world, litigation in the courts of justice about inheritance issues or other family affairs became a habit of the nobility. To sustain such suits, the archival practices in noble houses

became more and more consistent in tracing the process of each lineage's evolution. The houses usually had a specific place or piece of furniture to keep their documents, which steadily increased in both volume and importance from the 15th to 19th centuries. The growing complexity of estate management and the associated documents demanded the making of inventories, which were often very detailed and usually organized by themes, territories and typologies. Inventories were fundamental instruments that made it possible to retrieve information as soon as possible to face courts, royal officers or vassals (VOZMEDIANO 2007, 137-8). This is why archives are an important source of power: they are human constructs based essentially in information needs and in social values. As precious *aides memoire*, archives mediated power over present circumstances and over future times, and also conveyed the power to remember what some (or many) might have forgotten (COOK&SCHWARTZ 2002, 2-3). This is one of the multiple reasons why family archives are, nowadays, one of the richest fields of research, both in history and in archival science.

Certain periods were particularly active in Portugal for the reorganization of family archives, notably the 18th century and the 19th century (ROSA 2009). For the 19th century, we can identify three critical political moments that led to new interventions in family archives both in Spain and in Portugal: the Napoleonic wars, the liberal revolutions and the abolition of noble entails (*morgadios*) (VOZMEDIANO 2007, 140). After these three moments, some family archives remained in their places – untouched or sometimes

damaged – while others simply disappeared as the family divided or sold houses and properties, often separating the corresponding set of documents in the process. Other family collections were deposited in national or regional institutional archives (SOUSA 2011, 1-15). As for the archives that remained undivided in family hands, one can identify two situations: in some cases, old papers were regarded with indifference and relegated to basements or attics without being used; other families treated their documents as treasures, as far as the family's history was concerned. The latter applied in part to the house of Belmonte's archive, an archive with 30 m. of documents that has remained in the hands of the same lineage since the 16th century. This archive grew owing to the ownership of properties, to the establishment of entailed estate and also to inheritances. The oldest document conserved in this archive dates from 1499, and additions have continued to the present.

But, what can we say about the archive's inventories?

The production of inventories is often a response to specific demands on a repository's organization, as the flow of documents' production increases and exceeds the archivist's capacities to place or find them (HEAD 2007, 320; ROSA 2012, 574-575). The inventorying process in the House of Belmonte's archive took place at two key moments in the family's history: 1722 and 1807. What drove the family to organize its archive at these times?

As far as we know, two centuries of document production and accumulation preceded the first inventory of the house of Belmonte's archive: the inventory of 1722 (*Tombo de 1722*, ACBL, cx.47, nº1).

1722 is thus the first moment at which we can recognize an "archival consciousness" among this family. The 1722 inventory has three distinct parts: the first contains information about all the properties and their rents; the second comprises a list of the charges due to each parcel of property; the third part contains a list of documents. Traces of some previous arrangements are evidenced by references on the back of the documents, related to some previous order, perhaps by bundles or packages, and at least one previous list of documents is also mentioned in the inventory of 1722 itself.

Almost one century later, more precisely in 1807, the family apparently felt the need to make a new inventory in order to improve their repository's organization and the access to information that it allowed (*Tombo de 1807*, ACBL, Liv. 51; liv. 52). The new inventory was created as two separate volumes: the first contains all the information about the origins, rents and charges for all properties of the House, while the second contains an index to the archive's documents. Historically, this inventory was produced at a critical moment: the French army was nearing Portugal, forcing the Royal Family to escape on a British warship to exile in Brazil. The Belmonte family followed the Royal Court, since the first earl was a court official, close to the Prince Regent João (the future king João VI). Because of this displacement from his lands, the first earl needed to have accurate information about his estates, dues, income and so on as he moved to the other side of the Atlantic Ocean.

We can therefore easily understand the urgency of making a new inventory in 1807, with the imminent invasion in the context

of the Napoleonic Wars, to which we can add the fact that the old inventory was no longer fulfilling its function. But what was the significance of making an inventory in the year 1722? Most likely, the key reason was to establish control over the documentary proof of the properties' ownership by their heir, the new *morgado* Rodrigo António de Figueiredo, after the death of Pedro de Figueiredo; a new inventory could track additions as the estate grew since the 16th century, and document production grew with it. At a time of transition, the desire for easy access to this information may have provided the crucial motivation.

When we compare these two documents, it is possible to ascertain some differences between them, including the materials of which they were made (binding; type of paper; number of volumes; arrangement of the pages), the way they assembled the documents (by small bundles, or by files), the concepts at the basis of their elaboration (geographical or typological order), and the type of document descriptions they made use of. Older document descriptions – even the oldest ones, on the back of the documents – might have been the basis for some of the following ones, since the 1722 inventory sometimes describes documents in ways similar to such old summaries. However, we can also see considerable change in the way documents were arranged: whereas the inventory of 1722 described 106 packets and 923 registered pieces, the 1807 inventory transformed the same material into 41 packets and 1046 registered items.

We also need to be aware of the differences in terms of authorship, storage, amendments, changes, organizational criteria,

notes and genealogies. In fact, the parameters of explanation expected in an inventory had changed considerably during the nearly 100 years spanning 1722 to 1807, as one can observe. The later inventory is much more rational and organized, and follows a consistent method for all the descriptions it contains, whether they pertain to lawsuits, origins of plots of land, or dues. The writing, method, and validation of all items remains the same: for example, all descriptions are dated, mention the document's type, provide the recipients' names and locations, and name the notary. Closer examination shows that the original entries in the 1722 inventory are also quite consistent, but that subsequent use and the addition of new entries throughout the 18th century, made by different hands, turned this inventory into a less coherent one. But what else should we expect in a living document that was probably used on a daily basis for almost 100 years?

Although the bulk of both inventories consists of a register of properties, rents, incomes, and charges regarding the management of family estate, both also compile personal documents such as testaments, letters, baptism, marriage and death certificates, and so on. Each inventory also references material pertaining to genealogy. Several types of documents that are indexed in the two inventories, such as descriptions and family trees, explain details of the family's lineages, generally in relation to inheritances or property claims. We can also find some genealogies of the most prominent Portuguese families. Although both inventories refer to genealogical material, family trees are found only in the 1807 inventory.

The fact that the older inventory was kept and itself indexed in the 1807 inventory – even if it could no longer perform its original function – is very significant. One might question what use the 1722 inventory retained after it became obsolete. Hypothetically, the family probably kept it because the information it contained was considered valuable and useful for various purposes, *inter alia* the origins of the family, information regarding people and places, ancient names for places, and also some information concerning the existence of lost documents.

Careful analysis therefore helps us understand the process of document organization and production embodied in these inventories. Do they also allow us to trace the loss of documents, or, on the contrary, do we simply see two different ways to describe the same documents? By comparing the two inventories, we know that some documents were described in a different ways, but can also actually trace some documents that went missing between 1722 and 1807. For example, some 17th century letters by Pedro de Figueiredo, from several parts of Europe, are no longer listed in the 1807 inventory, although we find a clear reference to them in the 1722 inventory. Other losses include old letters to or from other members of the family; letters from supervisors or managers related to family's properties; old letters from various tenants, judges, attorneys, or attorneys-in-fact; receipts; and old credit and loan papers. We can also see the kind of papers that were kept between 1722 and 1807: sentences, rental agreements, requests, royal decrees, matrimonial contracts, some agreements, testaments and title deeds.

One can clearly observe that in the 1807 inventory, some documents remained outside the lists and the classification by packet, most likely since they did not fit into a geographical or typological order. First, the so-called “miscellanea”, which included documents not fitting in any particular category, but also a set of loose documents. Other documents that were not in the inventory are sometimes mentioned in notes aside from the primary classification, such as a set of “very important documents” kept in a safe. The 1807 inventory also describes a drawer specifically for parchment records, which contained 72 documents. Here, documents – probably separated and moved from their previous locations – were put into a drawer based on material criteria, namely their parchment substrate. If the compilers hoped that this measure would enhance the preservation of the most important documents, they were mistaken: only two parchment documents remain in the archive today.

The existence of two inventories for the same archive is, in its essence, very challenging if one considers their practical function as a means to access information. The differences between them can reveal changes in the scale, ambition and methods of archival organization at the time, as Randolph Head notes (HEAD 2007, p. 325). In a family archive, this points towards the real goal and meaning of the act of inventorying: to move from having a set of papers to managing a family archive. ■

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Tombo de 1722, Tombo com as várias rendas e todas as fazendas prazos e foros que pertencem a esta casa em que meu pai e senhor Pedro de Figueiredo se achava de posse até seu falecimento. (ACBL, cx.47, nº1).

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Organizing to manage: Francisco Trigoso de Aragão Morato and the organization of family archive(s)

Filipa Lopes

Introduction

The archives of the family Saldanha e Castro e Falcão Trigoso were deposited in the Torre do Tombo National Archive in 2007. This documentation, which ranges from the 14th to the late 19th century, contains rich material related to these important families and their ancestors, including the Saldanha Albuquerque Castro Ribafria, counts of Penamacor; the Trigoso Homem de Magalhães; and the Lima Falcão Gamboa Vanzeller Baena Henriques. Members of these families played prominent roles in the social, political and administrative history of Portugal, both in the continental and overseas territories (VILLAS BOAS & CHORÃO, 2012).

Among this documentation we find three inventories that were prepared and written by a member of the family, Francisco Manuel Trigoso de Aragão Morato, between 1825 and 1826. Currently bound together in a single volume, they contain a summary of essential documents related to properties of the Houses, which came from different family branches (FSACR, Liv. 1, Ind. 1, 2, 3).

The inventories' author was the second son of Francisco Mendo Trigoso Pereira Homem de Magalhães and Antónia Joaquina Teresa de Sousa Morato. He was born in Quinta do Roma, Lisbon, on 17 September 1777, and graduated in canon law from the University of Coimbra, where he later became a teacher. He was a member of the Portuguese Royal Academy of Sciences, and he worked extensively in offices and tasks of high administrative, legal and political importance in Portugal. Among other responsibilities, he was a member of the commission responsible for the reform and standardization of weights and measures; after the liberal revolution of 1820, he was elected deputy of the Parliament (*Cortes Constituintes*), service which was interrupted during the *Vilafrancada* (an absolutist insurrection in 1823) that temporarily kept him away from the political scene; and finally, he was invited to collaborate with the committee responsible for drawing up a constitutional charter that had been promised by King João VI. These important facts help us to situate the man and his profile just before he assumed the administration of the House,

and allow us to better understand his work on his inventories.

Why did he prepare these inventories himself? What happened just before 1825 that led him to undertake this task? What influence did his experience as a man with legal preparation have during this job? Why did he choose a particular structure and order for the inventories? What can his choices reveal about the family's practices of documentary management, organization and preservation? What can they reveal about the family's House management?

The memoir or "Memories" written by Francisco Trigo between January 1824 and 1835¹ sheds some useful light on questions about the inventories' context of production and about the arrangement of the family archive(s) (MORATO 1933). In this article, I will begin by briefly narrating some events that led him to this enterprise, and then will analyze his archival actions, based on his own testimony in the "Memories" and on the inventories themselves.

The author and his memories

Francisco Trigo lived in an agitated political context, and carried out important public functions during the last decades of his life. He explained that his goal in writing the "Memories" was to let his descendants know the man behind the public figure. He began writing after some disappointments and political disagreements took him temporarily away from public life (MORATO 1933, 4-5, 196). He never finished the work: the narrative stops in 1826, the same year he was chosen by the regent Isabel Maria to be the Minister and

Secretary of the Kingdom's Affairs (*Ministro e Secretário de Estado dos Negócios do Reino*), and afterwards appointed to be Councillor of State. After the definitive establishment of liberalism, he was elevated to peer of the Kingdom in 1834, and later to vice-president of the House of Peers (PORTUGAL 1933).

It is clear that his book comprises "constructed" memories written many years after the facts, and that it was meant to express his point of view about political matters and even more about family domestic affairs, in order to justify his choices. Nevertheless, his recollections provide vivid testimony on how he came to be administrator of his House, and why he needed to organize the family archive(s), as well as how he viewed and understood those archives.

Because he was a second son, his father, to preserve the unity of the House, had convinced him to renounce his due portion of the heritage on the behalf of his older brother, who in exchange offered him an annual pension. No one could predict that his brother Sebastião Francisco Mendo Trigo Pereira Homem de Magalhães would die so soon, in 1821, without a will and leaving three very young daughters. The widow, Maria Josefa Vicência de Oliveira Caupers de Sande e Vasconcelos, asked Francisco Trigo to prepare an inventory of the family estates and goods in order to organize the division of the family heritage. And so he did, requesting the help of an expert paleographer to read and summarize the documents that had been piling into chests in Lisbon since the French invasions of 1807, 1809 and 1810. He soon realized that great confusion reigned among the papers: some were missing because entailed properties

had been improperly sold as free lands, and there were also serious doubts about the legality of some entailed estates. The summaries that the expert prepared were inadequate, and Francisco Trigosó lacked the time to verify and correct everything before making his inventory of the family estates and goods (MORATO 1933, 31, 199-200).

Later on, his sister-in-law decided to marry again, with a cousin who was coming from Brazil (VASCONCELOS 1962, 276-277; MORATO 1933, 201). She therefore urged Francisco Trigosó not only to finish the inventory of estates and goods, but also to marry her eldest daughter, Mariana José Trigosó, to become the administrator of his late brother's House, and to be the guardian of her underage daughters. He resisted her intentions at first, but worried about the future of his nieces and the poorly managed and indebted House his brother had left, he eventually gave in and married Mariana Trigosó in 1824 (MORATO 1933, 200-202).

The planned inventory of the estates and goods was still underway when his sister-in-law, on the basis of what he considered a poorly drafted wedding contract, claimed the right to half of the properties of the House that were not bound in entail. Francisco Trigosó rejected this claim, which went against the interests of the House, but had to wait for the finalization of the partition of his brother's estate, which took place in 1825. This partition of the family estates and goods was based on the first inventory discussed above, which was full of errors. Therefore, as soon as he began the work in the archive, Francisco Trigosó prepared and sent to the judge, in 1826, a petition describing all the needed corrections, and asked for

a revision of the partition in an attempt to be fair to his nieces and to restore the unity of his House (MORATO 1933, 203-204).

Organize the archive(s) to know and to manage the estate of the family House

In 1824 Francisco Trigosó became the manager of a House he barely knew, spread over multiple locations and heavily indebted. His first step was to ask for a loan to make improvements in the properties, which could then produce more income. Next, he and his wife prepared a will and ensured that emphyteutic contracts for the nomination of tenants (*prazos*) would be united in the hands of whoever would succeed him in the administration of the entailed estates of the House — one that had already lost many properties (MORATO 1933, 221-222). Finally, knowing the confusion that reigned in the archive(s), he undertook the time-consuming enterprise of sorting, “by a method clear and bright, all documents of the House, and forming copious inventories of them”, a task that took all of 1825 and part of 1826 (MORATO 1933, 225). He noted and tried to correct all the mistakes that had been made when preparing the first inventory of the family estates and goods, focusing in particular on which properties were legally entailed and which were not. His academic background drew his attention to such questions and helped him in some cases, but because of the great confusion about these matters, he was not able to resolve all doubts.²

The first inventory he organized in 1825 catalogues documents

related to properties located in Lisbon's surroundings, and their dependencies. The inventory is divided in two parts: the first part describes documents related to property's acquisition, ownership and management, as well as to the associated leases; the second part primarily lists nuptial contracts and dowries, wills and other documents related to estates' partitions. This last part also included references to the portions of the heritage for his nieces, Emília Augusta and Maria Luísa Trigoso, and to the portion of Mariana Trigoso (FSACR, Liv. 1, Ind. 1). He made very detailed notes about all the partition shares and incomes, as he did in his "Memories". In fact, after the death of his brother, once the estates' partition document had been published, he prepared a report providing extensive information about the management of the inheritance from 1st May 1824 to 5th July 1825 (MORATO 1933, 223-225). Most likely, his purpose was to demonstrate his probity during the ongoing conflicts, and to provide full documentation about partitions and incomes to future family members.

The second inventory he prepared in 1825 describes documents and books related to Quinta Nova and to Quinta de Carmões, located in the surroundings of Torres Vedras. It is divided into seven parts that correspond to each of the properties and their annexes (FSACR, Liv. 1, Ind. 2). While the first inventory concentrated on properties that belonged to the estate of Francisco's mother, Antónia Joaquina Morato, this second inventory incorporated the ones that had belonged to the estate of his father's grandparents, Francisco Mendo Trigoso and Antónia Teresa de Aragão (MORATO 1933, 4-5).

The third index, produced in 1826, inventories documents concerning the house of Ponte da Pedra in the surroundings of Atalaia, and its dependencies (FSACR, Liv. 1, Ind. 3). This inventory included properties that had belonged to the estate of his father's grandparents, António Homem de Magalhães and Gerarda Caetana de Castro e Mendanha (MORATO 1933, 4-5).

Francisco Trigoso wrote in his "Memories" that his archival work was not finished, "but what is done gives great help for those who want to enter into intimate knowledge of the state of the various branches of this house; if it had been made by those who preceded me, it would have saved me much work, and fewer errors would have been made" (MORATO 1933, 225). Each one of these inventories is therefore not only a finding aid to recover documents, but also a source of profound knowledge about the history and the estates of various family branches that lay at the origin of the House. Documents and their inventories were important both in order to retrieve information to manage the estate, but also to solve problems about the transmission of the property through the centuries.

As Randolph Head has written, "creating inventories required archivists to make choices and weigh priorities, which gives us insight into their mental horizons and material resources" (HEAD 2007, 320). The contents and structures of the inventories examined here responded to the needs of the moment and to the priorities of Francisco Trigoso. Moreover, if we should be tempted to see inventories as mirrors of the archives, we should look carefully at the distorted images that they create, which more often than not show

only a partial truth. Inventories like these are, at the same time, near and far from the real archive: they reinterpret it, by which means they can turn pieces of paper into instruments of defense and memory (GUYOTJEANNIN 2010, 42).

Conclusion

According to recent historiography, to inventory family archives in the *Ancien Régime* was not a technical act, nor a task intended to serve historians. Instead, it usually resulted from a family's internal need to retrieve information for the benefit of its own proprietors (v.g. ROSA 2012, 574). The (re)organization of this family's archive(s) and the preparation of the inventories of 1825-26 provide a clear example of this. Francisco Trigoso urgently needed to resolve his conflict with his sister-in-law – who then became his mother-in-law – to recover the lost portions of the heritage, and to reestablish the unity of his House, as well as to get to know the House and its estate for better management. ■

Notes

¹ They were in the private archive of the Marquis of Lavradio, probably because the 2nd Count of Lavradio, Francisco de Almeida Portugal, who wrote Francisco Trigoso's eulogy in 1839 (PORTUGAL 1933), was his friend.

² He said that he could have requested confirmation from a judicial authority or confirmation by a royal decree, but for fear of getting an unfavorable verdict, he decided to do nothing.

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The organization and management of the archives of the House of Lapa (1804-c.1832): from the moral and religious cohesion of the family to the economic profit of the estate

Luís Henriques, Maria de Lurdes Rosa,
collab. Luís Sousa de Macedo

Introduction

In this text we shall briefly present and analyze – both in their inner meanings and in their broader contexts – two different sets of documents concerning the Archives of the *Viscondes-Condes da Lapa*, a noble house of Portugal in the late 18th and early 19th centuries. This material is linked together by its production in the same family, but also separated by the rapid political and social evolution that characterized the transition from the *Ancien Régime* to the liberal period in Europe (see ROSA and HENRIQUES, in print). All the documents are still in the possession of the family's descendants. The first set comprises a four-volume inventory completed in the beginning of the 19th century; the second consists of another but

quite different set of documents with connected purposes. Among these, for instance, we find a composite document written a decade later by the first Count when leaving for a long official journey: “Instructions” for his son and successor, compiling information and advice on the good management of estates.

The archival descriptions in the first set of material represent a major *oeuvre* of the ecclesiastical illegitimate brother of the 1st Viscount, a Cistercian monk, who a few years later would also organize the charter of the “Bailiado de Leça”, the seat of the Order of Malta in Portugal, whose governor at the time was another brother from this family. In both cases, the results are of a hybrid nature, mixing genealogical history – based primarily on original sources from the family archives and library, but also from the royal

archives – with a description of the family’s documents. Notably, the descriptions begin with long moralistic and religious prologues, which dwell on the importance of archives for the well-being of estates and families and on the heavy responsibility to maintain them in good condition that therefore lay on their governors’ shoulders. This background of domestic ethics finds striking echoes in two other meaningful documents: in the will of the Viscount in 1812, mentioning with gratitude the enormous task that his religious relative had taken on; and on the bindings of the main inventory, a “treasure object” made of the best leather and decorated in rich metals with the different coats of arms of the family – one for each of the three volumes (originally four), connected to the properties described within that volume.

Some years later, though relying heavily on his ancestor’s work, the 1st Count of Lapa organized a second series of finding-aids and house-management documents, but in a new spirit. As noted above, the most exemplary document in this series consists of his *Instructions* to his only son, written when he was leaving to serve as Ambassador to Russia. The document provides a complete analytical description of the economic condition of the family estates, giving clear legal and management instructions for maintaining the family’s prosperity. The 1st Count, not surprisingly, had a very different profile from his uncle the monk: a member of the *Academia das Ciências*, he specialized in economics and wrote on the importance of statistics for the development of the realm. Later he was sent by the liberal government to negotiate the first economic treaty between

Portugal and the USA, in 1823. The family archives still occupied a major place in his strategies, but the way he looked at them and put them to use demonstrated a major process of change that was underway.

Organizing and cataloguing the Lapa documents: Friar José de Almeida e Vasconcelos

The properties and privileges owned by the Viscounts/Counts of Lapa were the source of a large collection of documents that testified to their ownership and to their owners’ rights. This archive emerged alongside the rights they described. Its durability contrasted with ephemeral human lives and their transitory circumstances, making it valuable in itself over time. Naturally, the organization of the archive became more challenging with the increasing number of documents over the years.

At the beginning of the 19th century, José de Almeida e Vasconcelos (†1812), 1st Baron of Moçâmedes and 1st Viscount of Lapa, entrusted his illegitimate brother with the cataloguing of the family estates. The *codices* that his brother produced between 1804 and 1805 also involved a methodical rearrangement of the House archive itself, since the books’ entries indicated where in the library the documents were to be found. Friar José de Almeida e Vasconcelos was the right choice for the task, since he was a trustworthy relative, and was well acquainted with his family’s affairs. He created seven manuscript volumes that we may divide into two almost identical

sets. One of them consists of four volumes (the first book is lost, but its existence at the time is certain) and the other of three. Although the book bindings are similar, the first set displays the coats of arms of the family, forged in metal. Each book features the coat of arms connected to the properties whose documents it catalogues. The other set does not show this particularity, but its first volume features a lengthy genealogy that comes right before the inventory for the documents. The same genealogy would have appeared in the first book of the first set, as Friar José reveals in the third book. In 1825 the Count of Lapa referred to a set of four inventories, not seven, which suggests that the two sets were kept in different locations. Likewise, a 1816 inventory of the family estate in S. Pedro do Sul mentions “three indexes” and “their *mostrador* [inventory]”. Since they would have been difficult to transport, having these heavy series of books available in more than one place may have made administration of the properties easier.

The series with armorial signs on the covers would certainly have been associated with the family’s illustriousness. A text authored by Miguel Metelo de Seixas included in this book specifically discusses the relationship between heraldry and family distinction; we add only that a note in the Viscount’s will says that the archive, its organization and the four indexes and *mostrador* “has commanded everybody’s admiration” (*Registo*). The note’s presence in this kind of solemn document, which would preserve it for posterity, is significant in itself. The archive was thus shown to other people, which is evidence of the importance the family attributed to its organization

and good use. Significantly, other enlightened landlords’ archives were organized at the same time as Lapa’s, and in similar ways – for instance, the Morgado de Mateus archive (RODRIGUES / SILVA, 2012).

The books created by Friar José de Almeida e Vasconcelos were organized according to the family’s estates, with a section for each, such as *Albergaria e Morgado de São Paulo do Criz, Moçâmedes e Honra de Lamaçais*, and *Viseu*. Each of these sections displayed different types of documents (tenements, property acquisitions, judicial decisions, wills, etc.), and under these subdivisions provided document summaries and information on their position in the family’s library, in which both documents and bundles were numbered. (See for example in *Index*, book II, fols. 11 and after; the criteria Friar José followed are explained in *Index*, book I, fols. 19-20 v.)

Friar José pursued two goals as he wrote: to make the heritage’s antiquity known, and thus to celebrate its roots; and to strengthen the family’s identity by evoking the ancestors’ example, since some of them had served the Portuguese Kingdom all over the world. Heirs should sustain the family’s legacy and continuity, but they should also imitate their forebears in honor and integrity from generation to generation. Friar José’s prologues therefore spoke of family heroes who stood out in war and served the kingdom’s administration, not only in Portugal but abroad: in Asia, in Africa and in America. The House’s estates and privileges earned over the centuries were, in this view, the work of every family member, deceased or alive. According to Friar José’s vision, remembering the ancestors and being familiar

with the House's administration were inseparable obligations. This helps explain why he also included a detailed genealogy in his work (*Index*, book I).

Estate management and document management:

D. Manuel de Almeida e Vasconcelos

When the Viscount of Lapa passed away, D. Manuel de Almeida e Vasconcelos (1784-1832) inherited the House estates and titles. He became 2nd Viscount and later 1st Count of Lapa (1822), since his elder brother – D. José Maria de Almeida e Vasconcelos, 2nd Baron of Moçâmedes – had died prematurely. The Count da Lapa had a notable career in Portuguese high administration, both in Portugal and in the Empire. He was *Vedor da Casa Real*, counselor of the *Conselho Ultramarino*, and Extraordinary Ambassador and Minister in Russia (1819-1821). He also served as the main negotiator of a trade treaty between Portugal and the USA in 1822, and as a member of the Lords' Chamber of the legislature in 1826.

The Count's perception of the changes occurring in the 19th century may have been influenced by his travels abroad, namely to England. He was appointed to the Portuguese House of Lords under the new Constitutional Charter granted by King D. Pedro IV, where he continued to demonstrate progressive notions on several subjects. For instance, in 1812, as a member of the Science Academy, he published a memoir on statistics¹ – a new scientific field that would establish the rule of the numbers in the west – and was probably the

first person to coin the Portuguese word *Estatística* (SILVA, 1860, 350 e FERREIRA, 1984, 456-462). We must therefore bear in mind the Count's modern ideas as we seek to understand his concerns about his House's management.

Naturally, D. Manuel made use of Friar José's books. Nevertheless, he also created new ones to improve his administration. In 1819, before he left for Russia as Portuguese plenipotentiary, he wrote his *Instruções para a Administração da minha Caza durante a minha ausência*. This management tool was divided in three sections: administration, lease contracts, and the House's situation. Referring to his wife and mother as trustworthy relatives, the Count appointed the latter head of administration while he was abroad.

In an 1825 note, D. Manuel declared he had created new indexes: "The House archive includes forty bundles and four indexes and a *mostrador*. To make administration easier I brought into existence two books – the bundles' indexes – which have been very useful and relevant." (*Cartório*, vol. 1) Although D. Manuel made use of his father's books, he thus developed new ones to meet his own management requirements, which followed new models of organization. For instance, he arranged the bundles of documents by number, and not by territory.

The *Mostrador dos dous volumes do Índex dos Maços*, which the Count composed to help him as he read through the other two, was organized into sections according to the documents' legal status (rights and property titles; documents regarding entails; term rental documents). His goal was to allow immediate access to the

documents according to practical and legal needs, while also locating them in the genealogical order so esteemed by Fr. José. The *Discrição da Casa do Conde*, also dated c. 1825, offers a general account of the family estates, on about ninety folios. It mentions their acquisition dates, their revenues and their juridical situation. This accounting allows a broad view of the House's revenues, which included estate revenues, bonds (*apólices*), bank investments, and pensions (*tenças*).

It should be clear by now that D. Manuel de Almeida e Vasconcelos was a very careful administrator. He was doubtless encouraged to attend closely to these affairs because of the political instability he experienced in Portugal, aside from direct economic and affective reasons. His writings refer to fluctuations in the political and military situation, to which he attributed some of his economic losses (*Discrição*, fols. 27-27^v and 34-34^v). In fact, the last years of his life overlapped with the civil war between Liberals and Absolutists (1828-1834), whose ending he did not live to see.

The House of Lapa was not alone in its belief that careful administration was vital. Between 1804 and 1832 – meaning between the work of Friar José and D. Manuel's death – many other Houses were cataloguing their properties and systematizing their archives (see examples in ROSA, 2012 and in this volume). Political unrest, adjusting to liberal legislation, and indebtedness were the proximate causes, but these coexisted with a common changeless motive, namely the maintenance of each House, of its estates and privileges, and of its prestige. The House of Lapa seems to have succeeded, since our research has not uncovered any reference to debts. Before his

departure to Russia, D. Manuel even declared that his House was free of debts. Every document was carefully preserved, and the indexes assisted in the complex task of management. The available sources also show that the House of Lapa employed professional bureaucrats (*Procuradores*) who cooperated in House administration under the Viscount's and the Count's close surveillance. This approach may have helped curtail excessive spending or debts. Several other contemporary Houses were so poorly administered, in contrast, that they had to request the Crown's intervention. D. Luís Eusébio, 4th Marquis of Louriçal, for example, who was about D. Manuel's age, was highly indebted at the beginning of the 19th century (MONTEIRO, 2003, 379-380). The King appointed judicial administrations in such circumstances, in order to help major families clear their debts (MONTEIRO, 2003, 372-373 and 414-418).

Conclusion

Several members of the House of Lapa displayed a clear concern about administration over many generations. It is plausible that such zeal was handed down from their ancestors, since the archive contained a few 15th century documents, and since, according to D. Manuel, nothing was missing in 1825 (*Cartório*, vol. 1).

Naturally there was an economic element involved in recordkeeping that preserved the family patrimony, but family identity, including the maintenance of the House and its prestige, represented a second major element. Consequently, estate administration included

an emotional side, focused on the memory of the forefathers and their exemplary behavior. Friar José de Almeida e Vasconcelos at the start of his work emphasized this aspect by explaining why he had begun by composing a family genealogy: “I decided to write on the origin of the Families not only to discriminate the different lines from which your properties proceeded, but also for you to take your forefathers, who achieved prominence through religious, military and civic virtues, as models; simple pride in those honorable

ancestors without following their example will only bring delusion and disdain to the descendants.” (*Index*, book I, fol. 15) The family archive encouraged continuous journeys into the past, and provided an identity that rested upon the memory of the ancestors. ■

Notes

¹ Visconde da Lapa, “Memoria Sobre o modo de fórmr hum Plano de Statistica de Portugal”, *Memorias Economicas da Real Academia das Sciencias de Lisboa*, tomo V, 1815, pp. 155-171.

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Les marques héraldiques dans les inventaires d'archives des comtes de Lapa

Miguel Metelo de Seixas

Les archives de famille remplirent souvent le rôle d'instrument élu pour construire la mémoire d'une Maison, formée par le patrimoine accumulé et hérité par de successives générations, mais aussi par une série de marqueurs symboliques qui étaient intrinsèquement associés à cette idée même de succession. Le nom et l'autoreprésentation visuelle faisaient partie de ces marqueurs. Au sein de la nomenclature, il y avait les noms de famille (avec la répétition de noms propres et la fixation de patronymes) et les noms des biens eux-mêmes, fonciers (surtout quand il s'agissait de lieux détenus sous régime de seigneurie ou de majorat) ou édifiés (notamment les constructions ayant valeur symbolique, telles les vieilles tours ou manoirs associés à l'idée de provenance de la souche: les *solares*). Dans le champ de l'image, le concept de lignée recourrait entre autres à des signes visuels abstraits: les armoiries, qui par leur permanence et répétition sur plusieurs générations en vinrent à exprimer (et construire) l'idée d'identité et de continuité d'une famille. Un lien étroit s'établissait ainsi entre nom et armes, tous deux agents de la mémoire lignagère.

Dans ce sens, les armoiries étaient souvent invoquées comme témoins du droit au nom et aux biens, mais aussi d'appartenance à la noblesse. Elles pouvaient aussi prouver, en conjugaison avec les œuvres généalogiques, le droit à l'histoire et à l'intégration de récits historiques ou légendaires, permettant ainsi la construction rétrospective du «lignage», préférentiellement jusqu'à un passé le plus reculé possible (BUTAUD et PIÉTRI 2006, 101-150). Par leur origine historique, par leur esthétique originelle soigneusement maintenue même lorsqu'elle se révélait anachronique par rapport à la mode et à l'art, par l'ensemble de traités et de manuels qui en fixaient la grammaire et la mythologie, les armoiries remettaient vers une provenance médiévale. Ou plutôt elles l'évoquaient: de façon d'autant plus efficace que l'ensemble des signes héraldiques se situait dans le domaine d'une visualité de pouvoir onirique particulièrement intense, à cause de leur liaison à l'idéal de noblesse et de chevalerie. Ces emblèmes exprimaient donc l'idée d'une chaîne intemporelle d'âmes unies par le sang et la condition nobiliaire, par le partage d'un ensemble de biens symboliques et patrimoniaux dans l'en-deçà qui

correspondait à une communion de biens spirituels dans l'au-delà (ROSA 2012). Ce double partage avait valeur prospective dans la mesure où il pouvait se prolonger à l'infini: idéalement, biens, dignités et marqueurs d'identité devaient augmenter de façon continue par incorporation ou par achat, créant de nouvelles «ramifications».

C'est pourquoi la métaphore de l'arbre s'appliqua de façon si récurrente simultanément à la construction généalogique, au savoir lui-même, et aussi aux archives (KLAPISCH-ZUBER 2003, 114-194). Car l'archive familiale était la base de cette mémoire: c'était là que se conservaient les documents qui pouvaient servir de preuves judiciaires pour établir des droits successoraux, mais souvent aussi un ensemble de biens symboliques (chartes, matrices de sceaux, anneaux) et de documents généalogiques qui se portaient garants de la mémoire familiale. La conservation et la production opportune de ces documents ou objets constituaient un enjeu élevé, parfois vital pour la survivance de la famille dans son cadre social. L'archive avait ainsi valeur de trésor. Le rôle de l'héraldique au sein de ces archives familiales a déjà été étudié, aussi bien pour les documents et biens de nature héraldique que pour ceux qui présentaient une décoration armoriée (SEIXAS 2012: 449-462).

Dans le champ de la relation entre archives familiales et héraldique, les livres d'inventaire des archives des comtes de Lapa présentent toutefois un intérêt singulier. Leur compilation, menée à bien par José de Almeida e Vasconcelos, religieux et frère cadet du premier vicomte de Lapa, fut complétée en 1805. Après un laborieux travail d'organisation, l'ensemble des transcriptions et références documentaires prit la forme

de volumes de grand format rangés selon la provenance du patrimoine. Pour comprendre le contexte de création de ces inventaires, il faut les rapprocher du souci de construction de la mémoire d'une famille qui, après un parcours effectué sur plusieurs générations, parvint à intégrer le cercle restreint de la noblesse titulaire: d'abord avec l'obtention du titre de baron, puis de vicomte, enfin de comte, qui permettait de bénéficier de la dignité inhérente de «grand du royaume». La famille accomplit cette ascension pendant la deuxième moitié du XVIII^e siècle et le début du siècle suivant, époque finale de l'Ancien Régime parcourue par d'intenses tensions sociales et par une véritable crispation et déchéance financière de la haute noblesse (MONTEIRO 1998). Ces tensions trouvèrent alors dans l'héraldique un champ d'expression symbolique privilégié (SEIXAS et GALVÃO-TELLES 2009, 225-279). D'autant plus que l'association récurrente entre héraldique et noblesse avait développé au Portugal, depuis le XV^e siècle et sous la protection de la Couronne, un caractère bien plus systématique que dans la plupart des autres monarchies européennes (SEIXAS 2014, 257-284).

Les circonstances de production des inventaires des comtes de Lapa sont d'ailleurs expliquées par leur compilateur dans son prologue. Il s'agissait de fournir aux héritiers de la Maison de Lapa (ou Moçâmedes) les instruments appropriés pour administrer leurs biens, pour prouver leurs actes successoraux et leurs droits à de multiples privilèges. La documentation était rangée méthodiquement par volumes selon la provenance des biens; dans chaque volume, elle suivait l'ordre alphabétique, comptant avec un index. Mais cette série de volumes documentaires était précédée par un premier

volume de méticuleuse généalogie familiale, où la position centrale de la lignée (Almeida e Vasconcelos) était complétée par tous les rameaux qui, par mariage, avaient contribué à l'augmentation du patrimoine concret ou symbolique de la famille. Ce volume jouait un rôle primordial dans la mesure où tous les suivants étaient organisés en fonction d'une logique simultanément patrimoniale et lignagère. Ainsi, les volumes subséquents comprenaient maintes rémissions à la mémoire généalogique, par lesquelles l'auteur expliquait et justifiait l'encadrement familial des droits honorifiques et patrimoniaux détenus par le chef de lignée, au fur et à mesure que ce même patrimoine était dénombré.

Du point de vue héraldique, les inventaires d'archives des comtes de Lapa présentaient une spécificité inusuelle. Le premier volume, de nature généalogique, était décoré aux armoiries principales de la lignée, précisément un écu parti aux armes d'Almeida et Vasconcelos. Les volumes suivants portaient chacun deux plaques métalliques servant de *super-libros* aux armes des familles d'où provenaient les documents (et le patrimoine auquel ceux-ci faisaient allusion). Mais si les plaques métalliques armoriées des inventaires d'archives des comtes de Lapa ressemblent à des *super-libros* par leur forme, elles en diffèrent par leur essence même: ceux-là, ayant pour fonction signaler le propriétaire du livre où ils sont apposés, remplissent la fonction de signaler la propriété (DESACHY 2002); alors que celles-ci relèvent d'un objectif bien plus complexe. En effet, les écus de ces livres d'inventaire ne sont guère uniformes. Trois des volumes actuellement détenus par

D. Luís da Costa de Sousa de Macedo présentent ainsi les plaques armoriées suivantes:

- 1) Au recto, écu écartelé de Almeida, Vasconcelos, Mendes et Albergaria, avec un écusson sur-le-tout de Castelo Branco; au verso, écu écartelé de Novais, Leitão, Vilhegas et Cardoso;
- 2) Au recto, écu écartelé de Almeida, Vasconcelos, Soares et Pereira; au verso, écu écartelé de Coelho, Galvão, Ferreira et Lemos;
- 3) Au recto, écu écartelé de Maia, Almeida, Vasconcelos et Sousa; au verso, écu écartelé de Alvarenga, Melo, Gouveia et Loureiro.

On conclut que ces volumes furent décorés aux armoiries des autres rameaux avaient contribué à la grandeur de la lignée des *Almeida e Vasconcelos*, associant ainsi de façon intime l'intégration de patrimoine concret ou honorifique et l'étalage des respectives signes héraldiques. Toutes les plaques présentent une remarquable uniformité d'éléments extérieurs à l'écu: selon la mode contemporaine, ceux-ci sont posés sur un cartouche décoré de guirlandes, surmonté d'une couronne de noblesse. Ces emblèmes sont dûment expliquées par le compilateur, qui pour chaque volume énonce soigneusement chacune des armoiries, donnant leur blason (c'est-à-dire leur description selon le lexique et la grammaire héraldiques) et expliquant les raisons de leur choix en renvoyant, dans chaque cas, à l'extrait du volume généalogique respectif, qui permettait de déchiffrer l'origine du patrimoine incorporé. En procédant ainsi, il renvoyait à l'origine familiale de chaque parcelle de patrimoine et toujours avec rémission vers la partie du premier volume dans laquelle on pouvait trouver les

circonstances généalogiques de ces incorporations. On peut déduire que ce genre de liaison avait pour fondement une des caractéristiques propres aux majorats, qui souvent obligeaient expressément au port du patronyme et des armoiries de leur fondateur (ROSA 1995). Ce qui finit d'ailleurs par dicter une des spécificités de l'héraldique des familles nobles portugaises d'Ancien Régime: la généralisation de l'écartelé, correspondant d'autre part, dans le champ de l'onomastique, à l'accumulation de noms de famille (SEIXAS 2011, 223-264).

D'un point de vue plus technique, les descriptions héraldiques sont menées avec compétence, voire avec érudition. Ainsi, lorsqu'il décrit les armoiries de Sousa, le compilateur remarque que la version présente sur la plaque (Sousa dits *do Prado*) ne correspond pas à la véritable provenance dans ce cas-ci (Sousa dits *Chichorro*) (SEIXAS et GALVÃO-TELLES 2012, 411-445); et il présente les arguments généalogiques qui obligent à la respective correction héraldique. Ce qui renvoie à la remarquable diffusion de la culture héraldique sous l'Ancien Régime, comme fraction inhérente à la culture de tout gentilhomme (LOSKOUTOFF 2000). Longtemps méprisée par les historiens, la culture héraldique moderne attend d'être étudiée comme trait essentiel de la culture nobiliaire de cette époque (SEIXAS 2010 pour le cas portugais). Finalement, un dernier trait intéressant: le compilateur explique l'omniprésence des armoiries de Almeida et Vasconcelos sur toutes les plaques du recto, due à la prééminence de cette souche sur toutes les autres comprises dans l'histoire familiale. La métaphore de l'arbre généalogique, avec son tronc principal et ses rameaux secondaires, trouve ainsi son image héraldique.

Les volumes d'inventaire des archives des comtes de Lapa forment donc un ensemble cohérent, organisé selon un critère patrimonial et généalogique qui connaît dans les emblèmes héraldiques son expression graphique la plus accomplie. Considérant que l'héraldique est avant tout un code de communication sociale, on peut néanmoins se demander à quoi servait cette ostentation héraldique si complexe. Question légitime et nécessaire: trop souvent, les héraldistes centrent leur attention sur la dimension symbolique des armoiries, oubliant de considérer que chaque manifestation plastique détient un contenu et un sens propres, d'ailleurs variables au fil du temps et selon les divers intervenants dans le processus de communication (émetteurs, retransmetteurs, destinataires, récepteurs, commentateurs...). Dans le cas des inventaires des comtes de Lapa, on peut dénombrer trois objectifs communicationnels.

Le premier objectif correspond à leur caractère d'objets d'apparat, pour lequel contribue la grande dimension des volumes, leur calligraphie et mise en page soignée et la finition luxueuse des reliures en velours cramoisi. Ces livres étaient nettement faits pour être exhibés; ils formaient une sorte de trésor d'autant plus important qu'ils avaient la fonction de dépositaires (et agents) de la mémoire lignagère. Ils faisaient donc partie des *objets de mémoire* prêts pour être présentés comme témoins de l'ancienneté, de la noblesse et de la richesse de la lignée. D'où l'importance des écussons armoriés sur les reliures: ils rendaient immédiatement visible, pour tout observateur, l'enjeu nobiliaire et patrimonial que ces inventaires traduisaient.

Le deuxième objectif se rapporte au caractère pédagogique que ces volumes pouvaient avoir pour les membres de la famille. On oublie souvent que les images héraldiques jouent un rôle important dans la transmission visuelle de la mémoire des familles nobles pour leurs propres rejetons. Ce rôle était d'ailleurs partagé par la profusion héraldique dans l'intérieur des demeures de ce genre de familles, aussi bien dans leur décoration fixe que dans une multitude d'objets et de biens où les armoiries se répétaient à l'infini. Les décors héraldiques, qui pouvaient se développer sur des programmes plus ou moins complexes, permettaient d'exprimer visuellement l'histoire de la lignée, de sa parenté, de ses faits. Jusqu'en plein XX^e siècle on continua ainsi à dresser d'authentiques programmes héraldiques destinés certes aux visiteurs mais aussi aux membres du lignage, auxquels ils fournissaient un instrument visuel et pédagogique de mémoire (SEIXAS 2014, 86-109).

Finalement, le troisième objectif était lié au pouvoir d'évocation que ces images contenaient par leur lourde charge onirique. N'oublions pas que la réalisation de ces reliures armoriées date du début du XIX^e siècle, qui correspond à l'époque préromantique. Au long de tout ce siècle, une relation ambiguë s'établit entre héraldique et société en conséquence de ses convulsions politiques et sociales: d'une part, l'héraldique en vint à être exécrée par son association à la noblesse d'Ancien Régime et à ses privilèges rendus odieux par les principes révolutionnaires; d'autre part, son origine et son esthétique médiévales lui garantissaient une capacité d'évocation efficace de cette époque qui fascinait les romantiques et où l'histoire «nationale» allait chercher ses sources primordiales (SEIXAS 2012, 56-91).

Les plaques armoriées des reliures des comtes de Lapa nous permettent donc d'évaluer le rôle que l'héraldique a pu jouer, entre autres comme instrument mnémonique, dans l'identification visuelle des inventaires d'archives de famille. L'héraldique établit ainsi une liaison visible entre quatre éléments identitaires: le concept abstrait de lignage, construit autour de l'idée de perpétuation; les documents qui, organisés en archives dûment inventoriées, définissaient et garantissaient l'existence historique de ce même lignage; le patrimoine qui était associé à chaque provenance généalogique et qui permettait la continuité et la projection sociale de la famille; les désignations nominatives, aussi bien de chaque famille que de ses titres et propriétés. Bien plus que simples indicateurs de propriété, ces plaques armoriées remplissaient donc une fonction mnémonique, pédagogique et symbolique exceptionnelle. ■

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The expert paleographer João Filipe da Cruz (c. 1798-1827)

Rita Sampaio da Nóvoa,
Margarida Leme

By the end of the 18th century, the University of Coimbra, and later on the Royal Archive, started hosting, by decree of the King, a new chair in “Diplomatics”. Its students were expected to acquire knowledge about understanding and transcribing ancient diplomas, as well as a basic introduction to numismatics and epigraphy. From 1801 onwards, only those who had studied under this chair were authorized to apply for positions in the Royal Archive or to serve among Lisbon’s notaries. Similarly, these students were the only ones who could be licensed to act as “expert paleographers”, responsible for the mandatory authentication of every transcription made from a 16th-century or older document (SILVA 1828, 688-670).

João Filipe da Cruz, whose first and last known works date from 1798 and 1827 respectively – these dates also establish

the boundaries of his known life –, was one of those expert paleographers. Little is known of his background except that he was a secular presbyter, who therefore connected a religious career with one in the university and royal administration. He was appointed notary of the Royal Archive in 1813 (ANTT, *Arquivo do Arquivo, Avisos e Ordens*, mç. 9, n.º 7). Meanwhile, he put his expertise to other uses by publishing, in 1798, a volume about law entitled “Dissertation about the duties of judges” and by completing in 1805 a thorough manual dedicated to Portuguese diplomatics, which was never published but can still be found in the National Archive’s collections (ANTT, *Manuscritos da Livraria*, n.º 2193-A).

João Filipes da Cruz’s most significant work, however, was done outside the university and the royal administration. In fact, he

seems to have become a specialist in private archives outside of the public sphere, since he was hired to organize and inventory at least seven different archival holdings belonging to notable individuals or families – what we would today call personal or family archives. Apparently, this line of work was not his first choice. As he wrote to Pedro de Melo Breyner, father of the first Count of Melo whose archive he would later organize, João Filipe da Cruz was forced to accept those private contracts owing to his financial situation. The French invasions and the exile of the Portuguese royal family and their court to Brazil had obstructed his assuming the position of notary of the Royal Archive, leaving him with no other source of income (RODRIGUES 2013, 480-481).

Consequently, João Filipe da Cruz was able to combine his needs with those of the noble families, who felt threatened by the political and economic difficulties that would ultimately lead to the Liberal Revolutions and to the institution of a constitutional monarchy in 1822. Perceiving the archives as a means to help secure their families' assets and privileges, many nobles, especially title holders, reacted to this turbulent state of affairs by having their archives ordered and the documents made readily accessible in case of need. As had happened many times before during the *Ancien Régime*, an episode of crises or conflict triggered mutations in the archives, transforming them in direct relation to the threats they were expected to defend against.

João Filipe da Cruz was, then, one of the agents of these mutations. The extent of the presbyter's imprint on the family

archives he worked on seems to have varied, ranging from the reorganization and cataloging of a limited segment to the ordering of the entire set of documents. In both cases, he was also responsible for the transcription of various ancient documents that their owners considered relevant for various reasons, but could not read.

His first known work started at the beginning of the 19th century, when he was hired by the sister of the 8th Count of Arcos, who was left in charge of the administration of the House while her brother was exiled in Brazil (COSTA 2003, 921). He received the task of cataloging by chronological order all documents preserved in the Count's archive that referred to two different entails (*morgadios*), that is, patrimony that could not be sold nor divided, and that had to be perpetually transmitted according to strict specifications and in compliance with certain obligations. The foundation of entails was quite common in Portugal, and since the 14th century, had constituted a privileged mechanism to avoid the dispersal of the family's heritage among multiple heirs. Owing to their complexity and antiquity, the management of entails could be problematic, which is probably why the Counts of Arcos ordered the catalogues. In addition, they may have also anticipated the dramatic changes that the current political and economical situation was about to bring, beginning with the extinction of small entails in 1832 and the complete abolition of the institutional form in 1863.

Unfortunately, we were unable to gain direct access to the Counts of Arcos' catalogues made by João Filipe da Cruz, which prevented us from gaining more information about the methods

he used. Nevertheless, a great deal can be learned from what seems to be one of the first comprehensive reorganizations made by the paleographer, namely the arrangement of the archive of António Xavier de Miranda Henriques, heir of the Counts of Sandomil. Since António Xavier was a cleric, he could not inherit the entails of his family; as a result, that patrimony had to be distributed among several other relatives. After a heated and lengthy judicial confrontation between numerous potential heirs, the entails were dispersed, and with them the documents concerning each part of the patrimony. It was with this outcome in sight – the distribution of the documents among all of the heirs – that João Filipe da Cruz, in 1815, reorganized the entire archive and wrote an extensive inventory that he knew would soon lose its primary use, once the archive was dismembered.

The method he employed started by sorting all of the documents by type. Each type was then physically rearranged into one or more bundles, which contained the documents organized by chronological order, numbered and then briefly summarized in the inventory. However, not all of the documents were arranged into this system. In fact, only those that João Filipe da Cruz considered *interesting* were placed within the bundles and summarized. The rest were either stored in bundles without much organization – the documents that he thought were *insignificant* – or burned and destroyed, with judicial consent, at the presbyter's advice – these were later considered to have been *entirely useless* (NÓVOA 2013, 368).

In the same year 1815, João Filipe da Cruz worked on two other archives, one belonging to the Marquis of Abrantes, which is only briefly mentioned in one of the letters the paleographer exchanged with Pedro de Melo Breyner, and the other in the hands of the latter. Like the Counts of Arcos, the representative of the House of Melo first requested the presbyter's services to identify and catalogue all the documents in his archival holdings that concerned one specific entail. After completing this task in 1816, João Filipe da Cruz was then asked to reorganize and inventory the entire archive, probably because of the Miranda Henriques' involvement in litigation, since Pedro de Melo Breyner was António Xavier de Miranda Henriques' *ab intestato* heir, and needed to protect his interests against the other contenders.

In contrast to the Miranda Henriques inventory, the one prepared for the House of Melo in 1827 was made with the intention of creating an enduring tool that would allow the easy retrieval of any of the documents preserved in the archive. The method used was also completely different. Indeed, of all the reorganizations by João Filipe da Cruz that we know of, this one was by far the most complex. The paleographer started by creating packets identified by letters (A-Z) according to different themes, and then physically ordered the documents inside each packet by chronological order; simultaneously, he wrote a catalogue in which the documents preserved in the packets were virtually organized in alphabetical order by their title, with a note pointing the user to their physical location. Therefore, any given document could be retrieved either by date or by title (RODRIGUES 2013, 480-490).

Similarly, the fifth archive entrusted to João Filipe da Cruz between 1812 and 1817 also experienced a major reorganization. It belonged to the House of Ficalho, and was at the time under the administration of the first Duchess of Ficalho, widow and tutor of her underage children. As in the case of the Counts of Arcos, a woman was left in charge of the management of the House, and showed concern for the correct organization of the family's archive, which she knew would be crucial to the administration of her son, the future Count and Marquis of Ficalho, when he came of age.

Although the reasons are not clear, João Filipe da Cruz did not have access to the entire set of documents in this case, although he thought he did. The documents he did have access to were partially organized and catalogued in alphabetical order according to their type. The rest, specifically the letters, were stored in separate boxes without any order, in a similar way to the *insignificant* documents of the António Xavier de Miranda Henriques' archive. In addition, the transcriptions João Filipe had made of ancient or damaged documents were physically separated from the originals. Since the majority of the transcriptions that are preserved today in other archives rest next to the originals, we are not sure whether João Filipe was following a common practice, or whether his arrangement was a choice made specifically for the Ficalho archive (SILVA; ASSIS 2013, 66-67).

About one year after finishing this last project, João Filipe da Cruz moved on to the reorganization of the archive of the Counts of Cunha. However, the extent and the details of his intervention

elude us, since only a fraction of the documents were transferred to the public archive that now holds them, and we are not aware of the existence of any catalogues or inventories (CASTRO 1997, 119-120).

Fortunately, what seems to have been the expert paleographer's final project left more generous traces. By order of the Counts of Óbidos, Palma and Sabugal, João Filipe da Cruz began the reorganization of their archive and the creation of an inventory, although for some reason, probably his death, he was unable to finish his work. The labor was completed in 1836 by one of his colleagues, José Joaquim Matoso Gago da Câmara (c. 1775-1864), who had also studied at the Diplomats chair and held several offices in the royal administration. Together, they reordered the entire archive, using a method similar to that employed in the Melo archive, that is, by creating a virtual organization in the catalogue while physically arranging the documents according to a different set of criteria. In the catalogue, the documents were described by date under 123 different types, listed by alphabetical order with a note indicating their physical location. As to material organization, the logic that was followed by the paleographers is not immediately clear, because it was neither chronological nor alphabetical. It is possible that the documents were in fact physically distributed according to the entails owned by the family, which would be in accord with the concerns that guided the production of the smaller catalogues listed above (LEME 2012, 482-484).

Even if organizing private archives was not his first choice of a career, João Filipe da Cruz's legacy for family archives is undeniable.

Through his work, broader archival theories and methodologies that characterized the 19th-century understanding of archives came to be embedded in the documentary traces left by the families he served. His efforts embodied the goal of methodical and rational reorganization of the archives, made by specifically trained individuals concerned not only with good order and preservation of the documents, but also with the easy retrieval of information valued simultaneously for its historical, economical and juridical worth (RODRIGUES; SILVA 2012, 597-650). These theories and methodologies did not, however, condense into one single archival model, but were instead adapted to respond to the needs, concerns and wishes of the families in a changing political, economical and judicial context. This resulted in multiple solutions for the physical reorganizations of the archives, and for the recovery of information by means of catalogues or inventories. We thus can state that the reasons why the reorganizations and inventorizations were undertaken directly influenced how they were carried out, within the capacity of their author, the expert paleographer. ■

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Serving the Counts of Feira in the 19th century: João Jerónimo do Couto de Castro e Sousa, archivist and judge

Alice Borges Gago

In the late eighteenth century, D. Miguel Pereira Forjaz¹, lieutenant colonel of the second regiment of Oporto, led a detachment of Portuguese forces to participate in the conquest of Puigcerdá on 26th July 1795, as part of the Roussillon campaigns. He was injured in the battle, and in consequence he received the privilege, on 14 June 1796, of calling himself lord of the entailed estates of Freiriz and Penegate, and to benefit from their incomes for him and his heirs. His father, D. Diogo Pereira Forjaz, was already administrator of these lands and had taken initial steps to make a *tombo*² of the properties. D. Diogo had appointed Fernando Luís Pereira de Sousa Barradas to undertake this task, who had, however, not concluded it because of his nomination to be a magistrate at Arganil (CHABY, 1865, 156; *Chanc. Maria I*, 49, fl. 133; *Roma*, 93B, 128-II).

The owners of entailed estates³, chapels or crown properties were expected to organize a *tombo* in order to document their lands, tenants and taxes due. According to Carlos Alberto de Menezes, one of the first steps in creating such a *tombo* was to specify the property and its limits. When landlords became aware of changes in their properties, such as changed boundaries, evaded taxes, lost documents and titles, or even intruders, there were obliged to establish a *tombo* of ordinary jurisdiction by requesting the appointment of a judge. The candidate should be trained in law or be in public service, and the *Desembargo do Paço*⁴ should give him a commission describing the applicable regulations and procedures, which were “one well-ordered piece of legislation”, to enable him to proceed (MENEZES, 1819, 7). The appointed judge’s main function was to recognize the

possession and ownership of property, to renew contracts, deal with the municipalities in order to get a complete registry of claims, and other similar possessory actions. This registry he produced, the *tombo*, substituted for any lack of titles, which were often illegible, torn or lost, since it reformed these and served as an original title itself (MENEZES, 1819, XXVII, 8, 97).

The judge was therefore obliged to inquire carefully, and to recognize ownership on the basis of authentic and legal documents; before starting the judicial process, he had to examine and recognize existing titles, books, notarial records, revenues and expenses, and also to investigate the family history and its possessions, customs, maps and cadasters. After he had completed his recognition, the judge presented the results reporting the taxes and expenses to which the lands were subjected at the end of his book (MENEZES, 1819, XIX, XXIV, 97).

For the Forjaz properties at Freiriz and Penegate, Dr. Fernando Barradas was appointed to do this work; he was replaced in 1800 by the graduate António Roberto de Araújo, judge in village of Barca, who in 1806 obtained permission to appoint a registrar (*Roma*, 93B, 128-II). On 12th October 1812 Araújo, who had been promoted to judge of Vila Real⁵, was replaced by the graduate João Jerónimo do Couto de Castro e Sousa. The new judge was appointed to continue his predecessors' work, enjoying ordinary jurisdiction, and had the authority to decide any cause related to the *tombo*. In the next year D. Miguel Pereira Forjaz obtained the privilege of appointing a private notary to help the judge. (*Chanc. João VI*, 16, fl. 57v., 145).

João Jerónimo do Couto de Castro e Sousa (? -1837) was a son of captain João Couto Ribeiro de Castro and D.^a Ana Maria de Abreu Sousa e Vasconcelos, residents in the farm of Assento, in St. Estevão do Penso, Braga. On 8 November 1796, he had already graduated, was married to D.^a Margarida Joana Pereira do Lago, and lived in the Rua das Águas, Braga⁶. He and his wife also owned a farm in St. Estevão, and rented a piece of land at Freiriz in 1804 (GAIO, 1939, XI, 95; ACA, 102-6; *Chanc. Maria I*, 70, fl. 324v.).

In a letter of 29 November 1827 to D.^a Maria Joana Monte Forjaz, Viscountess of Vila Nova de Souto del Rei, written just a few days after his patron's death, João Jerónimo stated that he had done "many works for a huge volume, which is found in the notary's office of his Excellency, and he still had in his possession some documents"⁷ (*Extracto*, fl. 1v.). He wrote that he was available to continue to deal with the counts' business, in particular with the recovery of the *morgadio* archive and the incomes it documented; he also recalled the many discomforts he had experienced in guarding and defending it. He further noted that he had received orders from D. Miguel Forjaz on 22 August 1827 to deposit the archive with a particular scrivener in the village of Prado, which he opposed, reminding his interlocutor of the danger this represented for the papers. D. Miguel retracted his order a few days later, and ordered João Jerónimo to keep the papers in his possession, which caused him some trouble because of the huge responsibility of taking care of the archive. João Jerónimo therefore suggested to the Viscountess that instead of placing it in any scrivener's office, the archive should be deposited in a religious

institution, because that was the only place where it could be safe. He also said that he was afraid that the count's archive would experience the same fate as befell the Marquis of Ponte de Lima, whose archive was partially burned or stolen, causing him much damage.

Today we can still observe some of João Jerónimo's work in the registry of the Counts of Feira, incorporated into the Almada and Lancaster Bastos archive and deposited in the Biblioteca Nacional de Portugal since 1974.

From the first part of the *tombo* of Freiriz and Penegate João Jerónimo extracted in 1816 a *paraphrase of all the rights, and properties belonging to the morgadio*. He also reported his intention of writing a *livro do celeiro*⁸, which he actually completed only in 1821 (*Paráfrase*, 1816, pg. 2).

Three years later, on 3 June 1819, he made a chart, at the request of D. Miguel Forjaz, showing succession fees and taxes on real property from 1800 until that year. In the prologue of this document, he complained about the cavil and fraud of the cottagers, "always driven by interest or ambition, and not by necessity and poverty", and expressed how difficult he found it to disentangle people and their relatives, sometimes already deceased, and their heirs or successors. He also verified various contracts with periods of ten, fifteen and twenty years, and discussed the confused notes of several notaries, sometimes rewarding a few whistleblowers to get additional information (*Synopse*, fl. 2v.).

In 1820 he wrote a new paraphrase, which complements the first one. It reports on all the cottagers in their properties, complemented

with a synopsis of all the farms and pensions by parish. The titles of some contracts were outdated, some by over 100 years, which harmed the administration of the properties. The reform undertaken by João Jerónimo de Castro e Sousa therefore caused great disturbance among cottagers, who described the new imposts as extortions, and other offensive terms. In the prologue of the paraphrase, therefore, João Jerónimo emphasized the many sacrifices and inconveniences he had undertaken in this work, his impatience at the delays of cottagers and his disgust at their insubordination, which had brought him to the point of thinking about renouncing his job. However, his achievements allowed him to "see the prize of five hundred and many measures claimed, many bushels of wheat, chickens, eggs, wine and many other rights almost lost" (*Paráfrase*, 1820, pg. 1-4).

In the following year, João Jerónimo wrote an index of the entailed state records belonging to the archive, in which he reported that the archive was organized into about 46 bundles, and was open to anyone who needed to consult it on some particular issue. In the epilogue, João Jerónimo reminded his readers that until 1812, many documents had disappeared from the archive, but that since that date, they only exited sporadically to resolve pending matters (*Collecção*, fl. 29).

After the death of D. Miguel Forjaz in 1827, and continuing until at least 1830, João Jerónimo de Castro worked for the Counts of Feira, at that time linked to Viscounts of Vila Nova de Souto del Rei, as we can deduce from several letters written to the Viscountess, D.^a Maria Joana Monte Forjaz. In one of them, de Castro described

the state of some properties, such as the palace of Freiriz, giving her advice on managing family affairs. He also asked to be exempted from the administration of some business far away from Braga, and suggested the name of Bernardo José Ferraz Soares da Silva, one of the *tombo* witnesses, to take care of them (*Extracto*, fl. 2v.-23v.).

From the same letters, we know that he was persecuted during the Portuguese Liberal Wars in the summer of 1828, and had been forced to run away with his entire family “among the mountains”. He also said that he had saved the archive and other papers he had at his home, placing them with the nuns of the Conception monastery at Prado village (*Ib.*, fl. 17-17v.).

During the time he worked for the Counts of Feira, João Jerónimo de Castro e Sousa occupied other positions. He was nominated supervisor of the orphans in Santa Marta de Penaguião⁹, and enforcement judge for the Patriarchal Archbishop of Braga¹⁰ (*Chanc. João VI*, 20, fl. 189v.-190; VASCONCELOS, 1984, letter 86).

When he died on March 29th 1837, in Braga, without descendants¹¹, he had been in the service of the Counts of Feira for about twenty years (*Cividade, óbitos*, 1772-1837, fl. 201). ■

Notes

¹ D. Miguel Pereira Coutinho Forjaz Barreto de Sá and Resende (1769-1827), son of D. Diogo Pereira Coutinho Forjaz Barreto de Sá e Meneses (1726-1798) and D.^a Luisa Teresa Antónia Câmara e Meneses (*flor.* 1745), brother of D.^a Maria Joana Monte Forjaz Câmara e Meneses Coutinho Resende de Sá Magalhães (1783-1855), wife of the 3rd Viscount of Vila Nova de Souto del Rei, D. João José Francisco de Almada e Melo Velho e Lancastre (1783-1812).

² A land register. ALVES, Ivone [et al.] – *Dicionário de terminologia arquivística*. 1ª ed. Lisboa: Instituto da Biblioteca Nacional e do Livro, 1993, pg. 96.

³ For entailed state we mean “morgado”, an institutional and legal form established by royal, ecclesiastic or secular order, intended to defend the territorial economic base of a family. According to this system, the manor fields were inalienable, indivisible and unsusceptible of

sharing after the death of the holder and transmitted under the same conditions to the downward male firstborn or, failing that, by female line. CASTRO, Armando de – “Morgado”. *Dicionário de História de Portugal*. Dir. Joel Serrão. Porto: Figueirinhas, s. d. vol. IV, pg. 345-348; ROSA, Maria de Lurdes – *O morgadio em Portugal. Séc. XIV-XV. Modelos e práticas de comportamento linhagístico*. Lisboa: Ed. Estampa, 1995; id., *As almas herdeiras. Fundação de capelas fúnebres e afirmação da alma como sujeito de direito (Portugal 1400-1521)*. Lisboa: INCM, 2012.

⁴ Portugal’s highest court in this period.

⁵ It claimed that the district of Braga was far away.

⁶ The couple signed a contract with António José Ribeiro and his wife Angélica Maria, from S. Lourenço de Baltazar, term of Guimarães.

⁷ According to the index “Collecção de todos os Tombos, Livros do Celleiro, Escrituras, Documentos e mais títulos pertencentes ao Ex.^{mo}

Morgado de Freiriz e de Penegate”, the *tombo* of 1812 constituted three volumes, but so far we have not been able to find them in the archive.

⁸ A register book of bread rents paid by cottars and administration expenses.

⁹ Appointed on 5th October 1815 for a period of three years.

¹⁰ Since the year 1827 until, at least, 1833.

¹¹ His brothers, sisters and nephews were his executors, and he was buried in the Convent of the Ursulines of Braga, in which his wife had already been buried since 29th March 1831, as stated in a letter of 31 March 1831, to the Viscountess of Vila Nova de Souto del Rei. B. N. P., *ALB, Enc.*, cx. 48B and A. D. B., *Cividade, óbitos, 1772-1837*, fl. 176.

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cx. 93B, n.º 128 – II - unnumbered documents.

cx. 111, n.º 176 – *Collecção de todos os Tombos, Livros do Celleiro, Escrituras, Documentos e mais títulos pertencentes ao Ex.mo Morgado de Freiriz e de Penegate. Oferecida ao Ill.mo e Ex.mo Senhor Conde da Feira, donatario e senhor dos ditos*

coutos, morgado de Freireiz e de Penegate, Grão Cruz na Ordem de S. Tiago, comendador na Ordem de Cristo, tenente general dos Reaes Exercitos e do Conselho de Sua Magestade pelo seu Juiz do Tombo João Jerónimo do Coutto de Castro e Souza no ano de 1821.

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The Archive Castro-Nova Goa and its inventory: between proof and memory. A (re)construction of the 19th century

Patrícia Marques

The Archive Castro-Nova Goa is a remarkable family archive, rich in both archival and historical terms. The variety of documents and the broad chronological period covered allows insight into the history of the Castros and of several family branches, inserting them into the broader context of Portuguese history in general and the history of Portuguese expansion in the East in particular. The family that produced and owns the Archive Castro-Nova Goa descends from D. Pedro Fernandes de Castro, *o da Guerra*, father of the posthumously recognized queen D. Inês de Castro (1325-1355).

This branch of the Castros departed for Portuguese India in the person of D. Filipe de Castro, where it remained for about 300 years (1550-1855). Having settled first in Vasai and then in Goa, family members also played roles in Macau and Mozambique, occupying high political and military posts. For example, D. Rodrigo de Castro (1713-1774) was General of Rivers Sena, Mozambique, and three-time governor of Macau (CASTRO, 2013, p. 10). It was

also in Portuguese India that the Castros established relations with other important families such as the Sequeira e Abreu and Almeida Pimentel, creating alliances that were responsible for the sequential entry of numerous entails into the family estate. Both the resulting wealth and the social connections thus acquired were of great importance to the family.

After his return to Portugal, one representative of the family, D. Luís Caetano de Castro e Almeida Pimentel de Sequeira e Abreu (1840-1914), received the title of Count of Nova Goa by a royal letter of June 7, 1864, in acknowledgment of services provided by his ancestors. After the extinction of official Portuguese noble titles in 1910, the descendants of D. Luís Caetano continued to use the title in an honorary way. His successors as representatives of the family were Luís Filipe de Castro (1868-1928), professor of Agronomy and Minister of Public Works, Trade and Industry; Vasco Luís de Castro (1902-1996), who held a degree in law; and Luís Eduardo Mendia de Castro (1943-), whose degree is in Finance. The latter

has served as an executive for Portuguese and foreign banks, is the current holder of the honorific title, and also is the possessor of the Archive Castro-Nova Goa.

Before the mid-19th century, the custodial and archival history of the family documents is largely unknown. It is likely that some personal and professional documentation (related to the military posts, for the most part) accompanied the family in India, since we still find many documents of this sort in the family archive. In contrast, the asset management documents of the family's properties in Portugal most likely remained in Portugal, where proxies undertook their administration. It also should be noted that the Castro family did not originally own landed property of substance in Portugal. Rather, property began accumulating through incoming entails (and the documents began accumulating with them) only in the 18th century, beginning with an inheritance received by D. Rodrigo de Castro, and with the marriage of his son, D. Francisco Xavier de Castro, to a rich heiress, D. Ana Rita Maria Josefa Nepomucena de Almeida (MARQUES, 2013, p. 36-37). When the Castro family moved from Vasai to Goa, and then from India to Portugal, many family documents were lost. In consequence, what has come down to the present results mostly from material organized during the second half of the 19th century, to which some additional documentation has been subsequently added.

The Archive Castro-Nova Goa comprises documentation from the 14th century to the present. The actual extent of the archive

is still unknown, because it has not been studied in its entirety. In the course of the research discussed here, nearly seventy folders of written documentation have been identified, including some books and photographs. The gathered and organized documentation includes personal folders, asset management documents, correspondence with proxies and, from the 20th century, the political correspondence of Luís Filipe de Castro.

As already noted, the history of the Archive Castro-Nova before the mid-19th century is obscure. The fact that no references to previous organizational forms can be identified, along with the absence of old reference numbers from the documents, suggests that the organization carried out at in the 19th century was a pioneering effort that began from scratch. This first effort to regroup and recover the documentation had two objectives: to find justification for the right of possession in family properties, and to preserve individual and family memories. In general, the documents were organized by type, or in accordance with institutional structures for territorial components such as the entails. Within these larger categories, documents then follow a chronological order.

The archive's organization is inseparable from the production of its inventory. Consisting of three books, the inventory surveys and summarizes the documentation produced and received by the family from the 14th century until the date of the reorganization. Physically, the inventory corresponds closely to sixty document folders, which are identifiable in most cases from the reference

number assigned (number of folder and document). Currently, it is not possible to find some of the documents referred to in the inventory. We think that there are two reasons for this: removal and displacement of the documents later, or documents that never entered the archives themselves, having just been summarized from an original document in another archive. An example of this latter situation is Estevainha Gonçalves' testament, which is described on the basis of references, not as a full text.

The major questions that arise, whose answers we have not yet been able to determine, are the authorship and dating of both the archive's organization and the production of the inventory. Although unconfirmed by written evidence, oral and family tradition attributes the work to General Daniel Ferreira Pestana, second husband of D. Veridiana Constança Leite de Sousa e Lemos, and as such, stepfather of D. Luís Caetano de Castro e Almeida Pimentel de Sequeira e Abreu (the first Count of Nova Goa). The profile of the General very much fits to this tradition.

Biographical information available about this presumed organizer of the archive and author of the inventory is scattered and not always consistent. Daniel Ferreira Pestana, who was born in Funchal on October 13, 1824, was a *fidalgo cavaleiro*, a noble servant of the royal house, Commander of the Order of Christ and Knight of the Order of Avis and Conceição. Having initially played roles as *guarda dos armazéns* and as *porteiro da Alfândega do Funchal*, he sailed to Portuguese India, where he reached the rank of major general and governor of Daman. Married to D. Veridiana on

1 May 1854, he returned to Portugal, where he became a widower in 1859. He returned to Daman and married the second time, on 22 April 1868, to Maria Helena da Silveira e Lorena, daughter of the sixth Count of Sarzedas. In 1873 he was granted the lifetime management of the Quinta da Malvazia in Sacavém, along with some land in Pampilha. He died in Panjim on November 14, 1906 (MARQUES, 2013, p. 38). Daniel Ferreira Pestana was also a writer and collaborated extensively with the Portuguese press, especially in the political sector. He was also the author of *Princípios de Grammatica geral applicados à lingua portugueza, publicados e offerecidos à mocidade de Goa*, which reveals his considerable research and organizational skills. (PORTO DA CRUZ, s.d., p. 60).

Our review of the evidence persuades us that Pestana was the mastermind responsible for the archive's organization and the inventory's production. He also requested numerous documents now present in the Archive Castro-Nova Goa from various institutions, not only in Portugal (National Archives, civic governments, notaries) but also in Portuguese India. The dates when he assembled these documents help us specify the chronological period for the main work of the archive's reorganization: approximately between 1854 and 1864.

These dates also correspond to the period when Daniel Ferreira Pestana was connected to the Castro family. Having married to D. Veridiana in May 1854, he became guardian of her children in December of the following year (ACNG, Sequeiras, pasta 1, doc. 8). It should be noted that this guardianship contradicted the will of

D. José Maria de Castro e Almeida Pimentel de Sequeira e Abreu, son of D. Francisco Xavier de Castro and first husband of D. Veridiana, who had stated in his testament that in case D. Veridiana should marry again, she would lose the guardianship of their sons.¹

In 1863, already a widower, Daniel Ferreira Pestana continued as guardian of his stepchildren (ACNG, Pimentéis, pasta 2, doc. 4). He himself wrote one of the last documents in which he appears as guardian of the children of D. José Maria e D. Veridiana in June 1864 (ACNG, Correspondência da Índia, pasta 5). It was also in June 1864 that D. Luís Caetano received the title of Count of Nova Goa and married D. Virginia Folque. The timing of these records suggest that General Pestana wanted to leave all affairs in order before laying down his leadership of the family.

The family context described above cannot be dissociated from the situation in the Portuguese kingdom and empire in the same period. This broader context contributed strongly to the decision to organize the archive.

First, the reorganization of many archives took place in the second half of the 18th century and throughout the 19th century because of evolving management practices among the nobility. This evolution depended strongly on the ongoing reorganization of family and estate archives (RODRIGUES E SILVA, 2012, p.614). In addition, the 19th century was also marked by a major change of political regime in Portugal – the introduction of constitutional

monarchy – which led to a number of important political and social alterations. In this context, the measures on *morgadios* (entails), a form of property that had its origins in the 14th century and which became extinct in 1863, are of particular importance.

Land, income or other goods that entered an entail could not be separated or alienated, and the entail's administration was entirely dependent on the conditions stipulated by the founder. Through them, wealthy and powerful families perpetuated their heritage through many generations: entails thus also shaped rules of social conduct and ways of relating to the world of the ancestors (ROSA, 1996, p. 20). Many private chapels were included in a different type of entail associated with religious functions; though resting on different legal foundations, in practice they were almost equivalent to the secular entails.

The first laws regulating entails emerged during the reign of D. Afonso V (1432-1481), and aimed to balance the will of the founder and the right to royal intervention. King D. Manuel I (1469-1521) maintained royal intervention along these lines, and King D. Filipe (1527-1598) completed the establishment of royal control over succession issues. Another major change took place with Marquês de Pombal's law of August 3, 1770, which sought to limit the establishment of new entails and to extinguish small entails (MARQUES, 2013, p. 45-46) (CALDEIRA, 2012, 18-19). By the late 18th century, entails were generally considered an obstacle to economic development that also caused serious social problems.

Nineteenth century governments therefore took the final measures to abolish entails: Minister Mouzinho da Silveira's decree of 4 April 1832 extinguished all entails with incomes less than two hundred thousand réis, and by instituting secular leases, also reduced the fiscal benefits of larger entails (SERRÃO ET AL., 1984-1989, p. 360-361). In the second half of the century, the Law of 30 July 1860, also known as "*Lei do Registo Vincular*", ordered the abolition of all entails and chapels with income less than four hundred thousand réis, and the registry of all entails and chapels within two years in order to avoid their abolition. This law was complemented by another dated 19 January 1861, which regulated the implementation of entail reform legislation. Despite protests over these ongoing reforms, the law of 19 May 1863, finally extinguished entails throughout the kingdom, adjacent islands and overseas provinces; their goods were declared free of hereditary limitations, except for the Casa de Bragança (PIMENTA, 1932, p. XXXVII).

When analyzing the changing situation regarding entails, it is easy to understand why the Castro family could not remain indifferent. Although still residing in Portuguese India during the early 1850s, the family could not neglect the administration of the entails and chapels it possessed in Portugal. The need to register the entails and to provide proof of the right to administer them was thus most likely the cause of the family documents' organization.

In the Archive Castro-Nova Goa, several documents provide evidence about the registration of the family's entails, most notably one entitled "*Ficam neste Governo Civil, para serem*

registados no Registo Vincular, vários documentos relativos a uma Capella instituida por Catharina Dias Ravasco, de que é actual administrador Dom Luiz Caetano de Castro Almeida Pimentel de Sequeira e Abreu. Governo Civil de Beja – 6 de Fevereiro de 1863" (ACNG, Catarina Dias Ravasco, pasta 1). In addition, several books of registration for the entail of Pimentéis, although not dated, closely track the provisions of the 1861 Law, since they give the name, location, neighboring properties and measurements of the properties belonging to the entail. It is important to mention the existence of a *Tombo do Morgado dos Pimentéis*, (Register of the Entail of Pimentéis) dated 24 April 1860 (preceding the law on obligatory entail registration), which was requested by D. Luís Caetano, authorized by his stepfather Daniel Ferreira Pestana, and preserved in the royal archive of Torre do Tombo. This registry of the properties was carefully done, as the documents kept in the National Archives show: in the *Catálogo dos Registos Vinculares feitos em Obediência às Prescrições da Lei de 30 de Julho de 1860, e existentes na Tôrre do Tombo*, we find the entails of Pimentéis and Abreus, for which D. Luís Caetano de Castro e Almeida Pimentel de Sequeira e Abreu is mentioned as the most recent administrator (PIMENTA, 1932, p. 64-65).

In addition to an urgent need to prove possessions under the changing laws about entails, the organization of the Castro Archives may have rested on an additional motivation. In fact, the family was coming back to a country from which its ancestors had departed 300 years before, which was thus a place that many

of the family members had never known. Since this return was undertaken in a spirit of total change of career and life, the family needed, somehow, a re-founding.

The Castros' main reason for leaving India was, most probably, the situation of the army of the State of India. In the 19th century, the army consisted of voluntarily enlisted of Europeans and their descendants, along with natives of different ethnic groups and religions. Severe problems, including frequent military rebellions and riots not only discredited the army, but also reduced the possibility for a Portuguese descendant to have a stable military career. The Archive Castro-Nova Goa possesses documents that reveal family conflicts with the army, in the person of D. José Maria de Castro, father of the future first Count of Nova Goa, (ACNG, Pastas pessoais, pasta 9, doc. 40). The instability that led to the extinction of the Indian Army, by the Law of November 11, 1871 (LOBO, 2013, p. 42) (A.H.M., 2005, p. 3), also made the family's continuity in this region difficult.

Finally, the return of the Castro family to Portugal may also have been motivated by the desire expressed in the testament of D. José Maria de Castro, dated December 18, 1849, regarding his sons' education, which he wished to be carried on in Portugal and not in Panjim.²³ D. José Maria died on March 23, 1851 and, four years later, the family returned to Portugal. Respecting his father's wishes, D. Luís Caetano studied law in Coimbra.

Thus, associated with the need to register their properties, the family's return to Portugal may have raised their interest in

organizing the documents so as to preserve family memory, to prove their descent, and to keep alive the feats of their ancestors. For decades after the main organization, the family therefore continued adding documents to the existing folders, as well as creating new folders, at least into the 1920s. The inventory was also updated during the years following its production; the last new record in it is dated 1898. Several factors point to how the inventory and folders were used over the years. The organization was kept up to the present, and the inventory still remains the best way to search and recover documents and, consequently, the information they contain. This attests to the importance of the 19th century's organization, which gave the archive historical and informative value along with its evidentiary dimension.

The data and the reflections presented here represent the results of a study and analysis of this family archive that has taken place over recent years. Although far from complete, this study seeks to draw attention to the importance of family archives. When properly treated and studied, family archives allow scholars to know the families represented and their history, by placing them in a broader political and social context. In their particularities compared to the archives of other institutions, family archives are also a challenge, and their study thus contributes to the evolution of Information Science. ■

Notes

¹ “ (...) ratifico neste Testamento a declaração exarada naquelle codicillo de que deixará a dita minha Mulher de ser Tutora dos nossos filhos logo que ella contraia segundas Nupcias porque não he da minha vontade que os meus filhos vivão sugeitos a hum Padrasto” (ACNG, Testamentos, pasta 3, doc. 23, fl. 16v.-17).

² “ (...) nunca consinta que os nossos filhos frequentem as escolas publicas de Pangim (...) Eu bem quisera pedir e recomendar que em idade propria fossem os nossos filhos mandados a educar-se e instruir-se nos Colegios e Universidade de Portugal” (ACNG, Testamentos, pasta 3, doc. 23, fl. 7-7v.).

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ACRONYMS

ACBL	Arquivo da Casa de Belmonte
ACCL	Arquivo da Casa dos Condes da Lapa
ACF	Arquivo da Casa Ficalho
ACNG	Arquivo Castro - Nova Goa
AHCB	Arquivo Histórico da Casa de Bragança
ANTT	Arquivo Nacional da Torre do Tombo
BBP	Biblioteca do Banco de Portugal
BNP	Biblioteca Nacional de Portugal
BPARPD	Biblioteca Pública e Arquivo Regional de Ponta Delgada
BPE	Biblioteca Pública de Évora
CJBA	Coleção Jorge Brito e Abreu
PT	Portugal
AG	Alice Gago
FL	Filipa Lopes
LH	Luís Henriques
LSM	Luís da Costa de Sousa de Macedo
MJC	Maria João da Câmara Andrade e Sousa
ML	Margarida Leme
MLR	Maria de Lurdes Rosa
PM	Patrícia Marques
RN	Rita Nóvoa

ELEMENTS IN ENTRY HEADINGS:

Title (existent or [attributed])
Date
Author
Physical description
Accession number
Reference code

A NOTE ON ACCESSION NUMBERS AND REFERENCE CODES:

The “accession number” corresponds to the signature or other identifying and locational information used in each archive, library or private holding. For the most part, these do not conform to the requirements of an ISAD(G) “reference code”, which is mandatory when using databases that follow norms such as ICA-AtoM. Here we include both, in order to facilitate the connection with the database INVENT.ARQ (<http://www.inventarq.fcsh.unl.pt/>). For documents in digital form (in several cases, this is the only form available to researchers), we have treated the digital link as the “accession number”.

Bibliographical references are limited to works directly mentioned in the texts. For full bibliographical information concerning each document, see the online database <http://www.inventarq.fcsh.unl.pt/>

Catalogue

чтобы считаться,
ощущение, что это не
книга, а некий путь
или нужно пройти,
выпрямившись скакать а некий
с разбегу пролететь чтобы
и считаться с дорогой. Книга,
существовал, что пора ощущение,
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доблестно дальше.

Manuscript für König

unterzeichnet

Profunde, zu Wol. 4. Juli 1800

All. Kurb. Hof. Hofkapl.

zu ab. unter der Hand J. J. J. J. J. J.

Königlichen Oberkonsistorium

Kaufmann Alt.

Manuscript für König

1. [Livro do morgadio do Canidelo]

1458- c.1496

João Álvares Ribeiro, Fernão Ribeiro

[1]+41+[1] fls. (truncated); paper.

BNP, Reservados, Arquivo Almada Lencastre Basto –
Secção ANTT, pasta 35, cx. 4, doc. 678.

PT/BNP/ ALB/ANTT /35678

Archival history

This book of copies, mixed with familial and management annotations by the *morgadio's* heir, who received it from his father, originated with the foundation of the *morgadio* (entail) of Canidelo (near Oporto) in 1458. The foundress, Inês Ribeiro, nominated her nephew João as the first administrator; the properties followed his line of male descent for four generations, when the circumstance of a single female heiress intervened. The book and documents in it testify that possession followed this line, and that the book passed with the *morgadio* to the family into which the heiress married, c. 1565, joining their documents from another important *morgadio*, Argemil e Fajozes. The documents thus gathered were transmitted in the male line for five generations, until another break in male succession allowed it to enter the family of the Counts of Feira. The last count died without heirs, and his estates and archives passed to his sister, Viscountess of Vila Nova de Souto del Rei (1827). The book remained in this substantial family archive until it was sold to the National Library of Portugal, in the 1970s, where it was named after the last proprietors, “Almada Lencastre Basto”.

Documentary context and description

The *Livro do Morgadio* under examination is described in a 1498 document from Oporto, produced in the context of an examination by the king's officer in charge of chapels and wills, as a “hardback book, containing all the properties of the chapel, written by Fernão Ribeiro, administrator of the said chapel, and also the founder's will.” The *Livro* is therefore an important and precious example of a lay owner's *morgadio* autograph book, a “*livro do morgadio*.” In such volumes, the foundation charter is central, to which are later appended management remarks, documents copied from the public archives, registration of rent payments and so on. The book under examination here has a triple structure, which transforms it into a composite of land register, document copy-book, and family memorial. The management remarks, observations and records are very thorough, sometimes including daily entries. The book's memorial features are evident because in addition to the will of the founders, it contains lists of pious obligations originally ordered and subsequently increased, side by side with references to the properties that were used to pay them. It is noteworthy that the redactor makes comments on the connections between these two items. The book closes with an enumeration of the properties and wealth that the second *morgado*, Fernão, received from other sources, or gained through his own efforts, thus marking his position as a “good heir”, that is, a careful administrator of the family's properties and archives. **MLR**

*Este libro es un
 de las cosas que se ha
 de tener*

1577

*... el non padre quopai das llam
 ... para ... de ... de ...
 ... de ... de ... de ...
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1577



2. [Pública-forma do inventário e partilhas dos bens de Vasco Queimado]

27-10-1716

Unknown author

34 fl.; paper.

Available as a digital object in the DigitArq database

<http://digitarq.dgarq.gov.pt/details?id=4613584>.

PT/TT/CSI/A-B/004/0015/00020

Archival history

This document is a copy made in 1716 at the request of Manuel Ribeiro da Serra, of an earlier copy made in 1535 on the initiative of Fernão de Miranda Henriques, of the inventory and division of the assets left by Vasco Queimado de Vilalobos that took place between August 1497 and February 1498. The original document was archived in the Juízo dos Órfãos of Setúbal, while the two copies were probably kept together in the archive of the Miranda Henriques family. After the extinction of this family in 1815, at least the copy made in 1716 was transferred to the archive of the Counts of Óbidos, Palma and Sabugal, for undetermined reasons most likely related to the fact that the Counts were descendants of one of Vasco Queimado's granddaughters. After being inherited by the Marquis of Santa Iria, the Counts' archive was put up for auction and partially acquired by the National Archives in 1995.

Documentary context and description

It is difficult to determine why the copies of 1716 and 1535 were made, but it is probable that their production was motivated by the management of certain lands mentioned in the inventory. The original document was created with the purpose of inventorying all assets owned by Vasco Queimado de Vilalobos at the time of his death, so that they could be distributed among his heirs at some later date. Alongside jewelry, dresses, silver or cattle, we find a title dedicated to “deeds” or documents. This title consists of a list of 32 items briefly describing more than 42 separate documents. These documents are, for the most part, of emphyteutic nature; they are listed individually or in groups of two or more when they concern the same asset (for example, “deeds of the houses in Lisbon”). There are no indications of dates, cases, packets or reference numbers, which suggests that the documents were not systematically organized at the time the inventory was originally compiled. **RN**

3. [Tombo de Escrituras de Pero Anes do Canto]

1515

Pero Anes do Canto

1 book with 85 fls.; paper.

BPARPD, Ernesto do Canto, Arquivo Canto e Castro, Tombo n.º 20.

PT/BPARPD/ COL/CEC/ACC/20

Archival history

This book and other documents belonging to the family Canto e Castro were saved from a fire in the house of the last representative of the family, Maria Luísa do Canto, by Eduardo Abreu. He then offered them to Ernesto do Canto in 1893. The collection of the latter was left to the Public Library of Ponta Delgada, now Public Library and Regional Archive.

Documentary context and description

The codex was prepared by Pero Anes do Canto (1473-1556), a knight of the Royal House and one of the first providers of groups of armed ships in the Azores. It presents transcriptions of 80 records originally produced between 1482 and 1515, which relate to rural and urban property of the family Canto in the Azores. The copies comprise different types of documents, including: sales; *sesmarias* (contracts allotting uncultivated land); donations; confirmations of ownership of lands; charters with privileges from the monarch; chapters and regulations about land transactions; court decisions; agreements; a dowry;

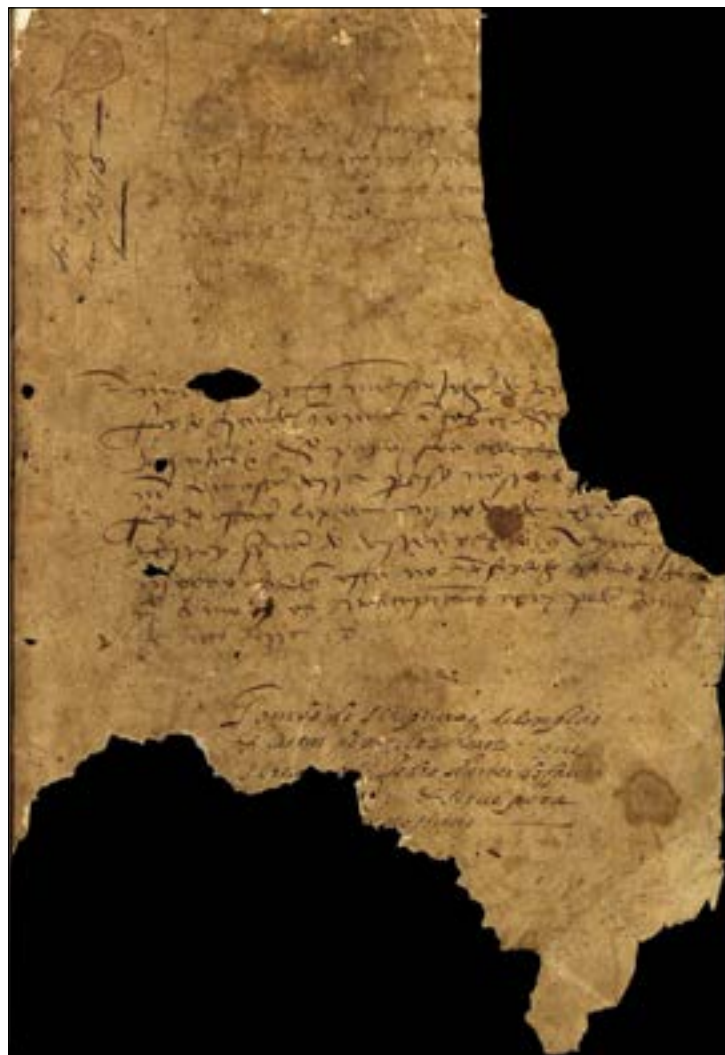
the record of a barter; an inventory of goods; and several notes and other considerations by the author.

The first part is organized according to geographical criteria. Documents related to properties on Terceira come first, followed by those related to properties on the islands of St. George, Faial and Pico. No chronological arrangement is evident, but the documents are arranged so that they display authentic processes of acquisition and ownership of property. According to Rute Dias Gregório (2002), the volume's format changes on folio 71 (doc. 67), which consists of the author's own notes regarding a dispute he had with captain Vasco Anes Corte Real, followed by a collection of copied chapters, charters with royal favors and privileges, and property confirmations, probably intended to sustain his position in that conflict.

There are signs of use, as well as notes and corrections made by the author himself or by others after him. The simplicity of the book attests to its pragmatic character as an instrument for safeguarding the property of the family. **FL**

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4. Tombo das escrituras dos bens de raiz e rendas do morgadio do Esporão e memorial delas

1536-1541

João Mendes de Vasconcelos

118 fls.; paper.

ANTT, Arquivo da Casa de Abrantes, nº ordem 257, lvº 1.

PT/TT/CABT/0257/01

Archival history

The book probably remained in the family of the *morgados* (holders of an entailed estate) of Esporão until the extinction of the male line in the 7th generation. The estate then came by inheritance to the nephew of the last administrator, who was the son of a nobleman of the Lencastre family, bearing this surname and the title of Earl of Figueiró. The *morgadio* remained in this House for two generations until, by extinction of the male line again, it returned to the main lineage of the Lencastres. From there it later followed a branch of the Lencastres family through marriage into the House of Marquis of Abrantes. The “Tombo” now belongs to the *fonds* named “Casa de Abrantes” in the National Archives, which represent only a part of the entire archives of that House, which were dispersed by the descendants in 1970s, then purchased by the National Archives on several separate occasions. From the documentation available in the National Archives, it has not been possible so far to ascertain exactly how the “Tombo” finally entered there.

Documentary context and description

The *Tombo de escrituras* (charter registry) consists of four sets of documents, some transcribed in their entirety, some summarized. This variation gives the volume a distinctive relationship to the archives themselves, somewhere between a cartulary and a list of the documents present in the charter-room, and functioning simultaneously in part as a surrogate and in part as a finding-aid.

The volume contains, in sequential order: 1) a list of lands rented out the morgadio to various tenants; 2) a list of documents relating to free estates inherited or bought at different times by João Mendes de Vasconcelos; 3) the *Tombo das Escripturas* proper, that is, a set of charters with notarial authentication related to the *morgadio*, and also to the chapel founded by João Mendes in the Évora cathedral in 1528; 4) a set of later charters, also authenticated, referring to acquisitions made by João Mendes de Vasconcelos and his son and heir. An index of the central documentary unit (the *Tombo*) appears at the opening of the volume, as well as, a paragraph explaining it.

As noted, the documentary blocks suggest different ways of relating to the archives, no doubt in relation to the contexts of production of the documents. The “Tombo” reunites 29 charters dated from 1341 until 1532, and has cartulary characteristics mixed with a book of authentic charters. The material is organized by the sequence of events that led to the foundation of the morgadio, then of the chapel: first the foundation document by Teresa Eanes da Fonseca, then

Tauanda do Tombo das escripturas dos Reis
depuis o tempo do morgado de espoza e
memorial delas //

1. **Qua** primeira folha nas pias de pinto do dito morgado //

2. **Qua** segunda folha nas pias de pinto de novo all de pinto da fongren
da dita folha de pinto das pias do dito morgado e de pinto da dita pias
e de pinto de pinto de pinto //

3. **Qua** terceira folha de pinto de pinto de pinto de pinto de pinto de pinto //

4. **Qua** quarta folha de pinto de pinto de pinto de pinto de pinto de pinto //

5. **Qua** quinta folha de pinto de pinto de pinto de pinto de pinto de pinto //

6. **Qua** sexta folha de pinto de pinto de pinto de pinto de pinto de pinto //

7. **Qua** setima folha de pinto de pinto de pinto de pinto de pinto de pinto //

8. **Qua** oitava folha de pinto de pinto de pinto de pinto de pinto de pinto //

9. **Qua** nona folha de pinto de pinto de pinto de pinto de pinto de pinto //

10. **Qua** decima folha de pinto de pinto de pinto de pinto de pinto de pinto //

11. **Qua** undecima folha de pinto de pinto de pinto de pinto de pinto de pinto //

12. **Qua** duodecima folha de pinto de pinto de pinto de pinto de pinto de pinto //

13. **Qua** trezessima folha de pinto de pinto de pinto de pinto de pinto de pinto //

charters recording the properties' acquisition, partitions and demands amongst the heirs, and so on. There is even documentation concerning some properties before they entered the *morgadio*. Documents in the *Tombo* are transcribed in full and authenticated by a notary. They have no call numbers, but each is introduced by a summary. This part of the larger document emphasizes solemn features establishing memory and proof. While the *Tombo* stresses the importance of the founders (the FONSECAS), it also reinforces the *morgadio*'s refounding by the Vasconcelos through the inclusion of a document stating the obligation of annexing one third of the entire heritage (the *terça*) to the new proprietary lineage in each generation, by which the obligation to use the surname of "Vasconcelos" comes to surpass the use of "Fonseca". The document also present many charters related to the foundation of the chapel, a magnificent and huge funerary space.

In contrast, the list of rents and the *memorial* are simple lists in which documents are only summarized, therefore referring the user to the actual documents in the charter-room. This charter-room seems to have been of considerable size and to have used in the course of management. Only further research, however, could ascertain whether all the documents summarized were in possession of the Vasconcelos, since some of the rents charters seem to have been in the possession of notaries. The first list contains summaries of seven documents, dated, and the name of the notary of Evora who had the documents, or had prepared the list (sequential numbering on the left side of the text may represent an archival signature;

the summaries indicate the tenants, location, values, the notary and other minor information). The second list, or *memorial*, is composed of three different parts, which summarize land purchases made by João Mendes de Vasconcelos with funds originating outside the *morgadio*; the summaries are all numbered, and the numbers seems to indicate a territorial organization, not chronological. Both lists testify to good management by the re-founders of the *morgadio*, Álvaro Mendes de Vasconcelos and his son João, who commissioned the book, as well as their ability to enrich the *morgadio*'s assets. They were evidently good managers of the estates and also of the archive, since besides the compilation of the *Tombo* itself, the *Memorial* also refers to the existence of another charter-book referring to the "estate of Paço". By joining two lists of properties and the records supporting their possession to the more formal *Tombo* they sought to document their good practices for posterity, as well as sustaining both those practices and the *morgadio* that they defended. **MLR**

5. [Catálogo do Cartório da Casa]

Unknown, but probably in or after 1542

Unknown author

Available only as a digital object in the DigitArq database

<http://digitarq.dgarq.gov.pt/viewer?id=4343895>.

PT/TT/VNC/A/0701

Archival history

The inventory was probably made upon the majority of Lourenço de Brito Nogueiria, heir to the *morgadios* (entailed estates) of the Britos and the Nogueiras families. The last document summarized, dated 1542, is a receipt for payments due to Lourenço's preceptor, which indicates that he had reached adulthood. This was the moment when his late father had stipulated he would manage the estate alone, no longer under his mother's surveillance; she probably commissioned the inventory owing to this legal context. The inventory seems to have been kept in the Brito-Nogueira house until the marriage of Lourenço's son Luís to the heiress of the title of Viscounts of Vila Nova de Cerveira, ca. 1575; it was then probably integrated into the Lisbon archives of the Viscounts, where remained until the 20th century. After a history of loss and disappearance of archives, a descendant of the last holder of the title succeeded in purchasing large sets of pertinent documents at auction, and deposited his acquisitions in the National Archives-Torre

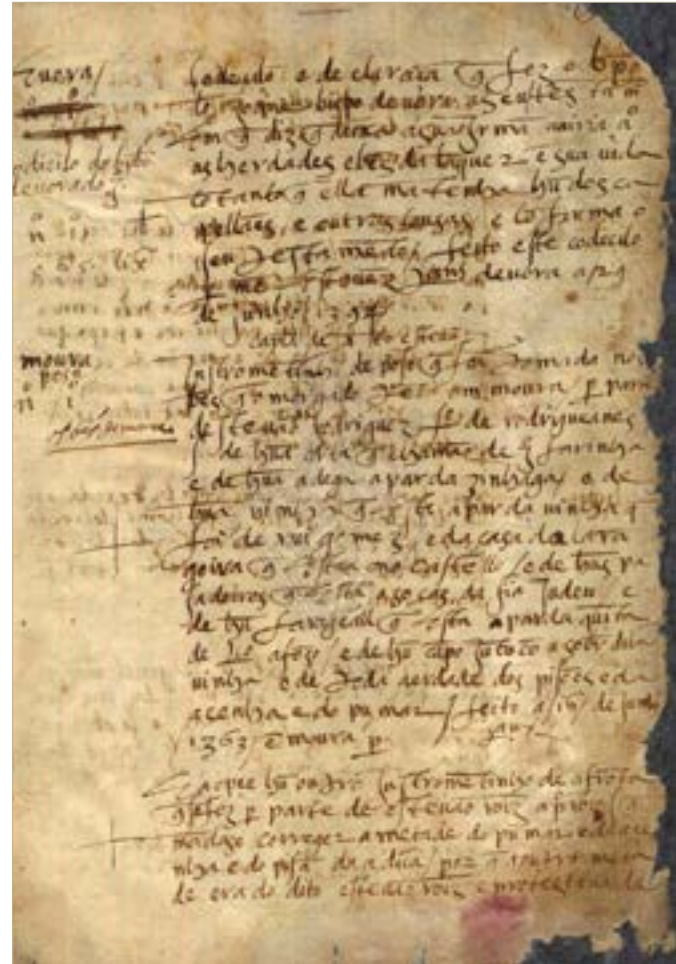
do Tombo in 2000. Many documents – including all the inventories – were digitized before the *fonds* was taken back by the family in 2011.

Documentary context and description

The catalogue describes documents from three different producers: the Brito family, before its alliance with the Nogueira family (documents concerning the *morgadio* of Saint Stephen in Beja, the region where the family had its origin and where most of the properties were located); a part of the Nogueira family, represented by Violante, the heiress of the *morgadio* of Saint Anne, associated with the church of St. Lawrence in Lisbon (properties in and around Lisbon, and in Santarem); and the Brito-Nogueira family, originating from the marriage of Violante with the Brito heir, João Afonso, and continuing until the legal majority of his great-great-grandson, Lourenço.

The inventory consists of a list of documents without perceptible organization, either territorial, by family or by documentary typology.

The summaries are very thorough, including each document's date and place, and the name of the notary. The family member responsible for the recorded action is indicated in almost all the summaries. The margins of the book include reference codes, constituted of a place name and a number (sometimes the name of a document type substitutes for the location – for example, for documents such as bulls). The place names' order is not sequential throughout the book, although the numbers within each named place are. The reference codes suggest that the collection it described was – or was becoming – organized by territories, but in some disorder. The inventory also contains some interesting information regarding the archivist, who was probably a cleric, perhaps a teacher of the younger family members: when summarizing the will of one of the family's founders, he praises the document as “very well organized,” and he adds a wish, in Latin, for the peaceful eternal rest of the testator, whom he calls a “pious man” (“requiescat foelicissime optimus et pius senex”). **MLR**



6. [Inventário da documentação pertencente às igrejas que eram do padroado dos condes de Marialva]

1565 (?)

Unknown author

23 fols. (18 fols. + 5 fols.); paper.

ANTT, Gavetas da Torre do Tombo, Gav. 9, Mç. 7, n.º 19.

PT/TT/ GAV/9/7/19

Archival history:

This inventory was probably produced in 1565, but its custodial history is mostly unknown. It is also unknown when the last 5 folios of this inventory were separated from the rest, and put into a different packet within the *Gavetas* (drawers) in the National Archive.

The inventory at some point entered the *Gavetas* of the Royal Archive, which after the triumph of Liberalism became the National Archive of Torre do Tombo. Gaveta IX comprises documents related to donations, property, possessions and the patronage of churches by the Counts of Marialva. Notably, D. Luís, whose son D. Antonio commissioned this work, was the heir of the last representative of the main line of the Coutinho family, Beatriz de Meneses, widow of the 4th Count of Marialva and 2nd Count of Loulé.

Documentary context and description

The inventory was commissioned by António (1531-1595), prior of Crato, natural son of the Infante Luís, Duke of Beja, and grandchild of

the King Manuel I. Although the volume is not dated, two references in the text name 1565 as being the “present” year; in consequence, Luís Filipe Oliveira (2000) considers 1565 to be the year of its making. The inventory describes documents related to around forty churches and chapels that had been under the patronage of the Counts of Marialva, located mainly in the dioceses of Lamego, Porto and Viseu. These patronages came into the possession of António because the abovementioned Beatriz de Meneses left them to António’s father.

Over 300 documents, produced between 1384 and the mid-16th century, are summarized in some detail and with an indication of the date of production. Entries are organized by the names of the churches and chapels: each one has its own section, and the respective documentation is catalogued below. Among the records are many donations and episcopal confirmations of the presentation of priests, some papal documents, and court decisions. Some entries also contain notes about the church and about conflicts and ongoing initiatives, as well as notes about other documentation related to it.

The inventory shows signs of use, and contains many later notes made by various scribes. **FL**

Bibliography

OLIVEIRA, Luís Filipe – “O Arquivo dos Condes de Marialva num inventário do século XVI”. In *Elites de redes clientelares na Idade Média. Problemas Metodológicos*: atas, ed. Filipe Themudo Barata. Lisboa: Edições Colibri, CIDEHUS-UE, 2001, p. 221-260.

M. Costa

Inventario de todas as cartas e cartas
de Portugal as quais se puzo de guarda no
reale e regio de S. M. de Lisboa. E foy de
Carta de D. Manuel e de D. Joao e de D. Joao
de S. M. de S. M. de S. M. e de S. M. de
gloria.



João de Castela

Item de D. João de Castela de D. João
de S. M. de S. M. de S. M. de S. M. de
D. João de S. M. de S. M. de S. M. de
muito prestado e de S. M. de S. M. de
pouco prestado.

Item de D. João de Castela de D. João
de S. M. de S. M. de S. M. de S. M. de
prestado, no anno de 1481.

Item de D. João de Castela de D. João
de S. M. de S. M. de S. M. de S. M. de
prestado, no anno de 1482.

Item de D. João de Castela de D. João

Item de D. João de Castela de D. João
de S. M. de S. M. de S. M. de S. M. de
prestado, no anno de 1483.

Item de D. João de Castela de D. João
de S. M. de S. M. de S. M. de S. M. de
prestado, no anno de 1484.

Item de D. João de Castela de D. João
de S. M. de S. M. de S. M. de S. M. de
prestado, no anno de 1485.

7. Tombo em que se contem todas as propriedades, rendas, foros, privilégios, bulas e alvarás dos morgados de Santa Ana e de São Lourenço de Lisboa, Gaião e Santo Estêvão de Beja

c. 1570-1646

Unknown author

Available only as a digital object in the Reading Room of the National Archives (to be consulted under demand).

PT/TT/VNC/A/0002

Archival history

This book seems to have been undertaken to ease access to a set of documents previously described in another inventory (see entry nr. 5), by organizing them territorially. The fact that is not dated limits speculation, especially since the subsequent history of transmission is difficult to ascertain. The *tombo* bears numerous signs of use, the most important being an excised set of pages concerning the documents of a specific *morgadio* (entail). This was the *morgadio* of St. Stephen of Beja, which was a part of the dowry of Madalena de Bourbon, an heiress of the Viscounts of Vila Nova de Cerveira family, when she married the Count of Arcos, in 1646; a note in the inventory explicitly mentions that the pages accompanied the rest of the dowry. In the following centuries, the book remained in use, as it is shown by many references in the family archive's later inventories. It was probably kept in the Viscounts' main Lisbon residence, the *Palácio da Rosa*, until

the 20th century. After a history of loss and disappearance of archives, a descendant of the last holder of the title succeeded in purchasing large sets of pertinent documents at auction, and deposited his acquisitions in the National Archives-Torre do Tombo in 2000. Many documents – including all the inventories – were digitized before the *fonds* was taken back by the family in 2011.

Documentary context and description

The *Tombo* refers to the archives originally possessed by the Brito, Nogueira and Brito-Nogueira families from the fourteenth century onwards, until their entrance in the Viscondes' House. The documents summarized correspond to those found in the “Catálogo” (ca. 1542) (see entry nr. 5), and the summaries are similar. However, the organization of the entries is completely different; it may be supposed that this organization reflects the management of the estates of the original possessors when they entered the larger managerial system of the Viscondes. The documents are strictly organized by *morgadios* or entails, a legal form of property that put substantial constraints on how the lands could be used; knowledge about the details of each *morgadio* was therefore crucial to those who managed the lands involved. Inside the set of documents corresponding to each *morgadio*, a territorial logic of organization holds, but properties in the same localities might be scattered among the many *morgadios* and chapels that the families had instituted and now managed through a complex framework of main and secondary lines. The Viscounts were constrained to respect such frameworks in order to maintain these possessions. **MLR**

Este e o primeiro livro do presente livro
que trata da vida e morte de
Nossa Senhora e de todos os
santos e de todas as coisas
que se fizeram no mundo
e de todas as coisas que se
fazem e se farão no mundo
e de todas as coisas que se
fazem e se farão no mundo

Este e o segundo livro do presente livro
que trata da vida e morte de
Nossa Senhora e de todos os
santos e de todas as coisas
que se fizeram no mundo
e de todas as coisas que se
fazem e se farão no mundo
e de todas as coisas que se
fazem e se farão no mundo

Este e o terceiro livro do presente livro
que trata da vida e morte de
Nossa Senhora e de todos os
santos e de todas as coisas
que se fizeram no mundo
e de todas as coisas que se
fazem e se farão no mundo
e de todas as coisas que se
fazem e se farão no mundo

Este e o quarto livro do presente livro
que trata da vida e morte de
Nossa Senhora e de todos os
santos e de todas as coisas
que se fizeram no mundo
e de todas as coisas que se
fazem e se farão no mundo
e de todas as coisas que se
fazem e se farão no mundo

Este e o quinto livro do presente livro
que trata da vida e morte de
Nossa Senhora e de todos os
santos e de todas as coisas
que se fizeram no mundo
e de todas as coisas que se
fazem e se farão no mundo
e de todas as coisas que se
fazem e se farão no mundo



Governase pellos titulos q
estao as margens das
addicoes

Deo in nomine Amen
et in nomine Amen
et in nomine Amen

Santa Anna de Sao Loureço
de Lisboa

Este e o primeiro livro do presente livro
que trata da vida e morte de
Nossa Senhora e de todos os
santos e de todas as coisas
que se fizeram no mundo
e de todas as coisas que se
fazem e se farão no mundo
e de todas as coisas que se
fazem e se farão no mundo

Em Lisboa no dia 15 de Junho de 1715
João de Deus
João de Deus

8. [Treslado de escrituras, em pública-forma, de Rui Teles de Meneses]

16th-17th century [after 1583-02-08]

Unknown author

149 fls.; paper.

BPE, Manizola n.º 167.

PT/BPE/ MAN/167

Archival history

This codex was prepared after 8 February, 1583. It now belongs to the collection *Códices da Manizola*, found in the *Cimélios* room of the Public Library of Évora, which comprises manuscripts from the Manizola Library that belonged to José Bernardo de Barahona Fragoso Cordovil da Gama Lobo, 2nd Viscount of Esperança. While it is possible that the codex was preserved in the possession of the family Teles de Meneses, most of its custodial history is unknown. In the 18th century, the Teles de Meneses family entered by marriage into the House of the Counts of Nisa, whose archives were almost entirely dispersed in the late 19th century. Some documents belonging to Rui Teles are now in the National Library, having entered through the purchase of documents when the House of Nisa's collections were auctioned. A similar provenance is most probable for this exemplar in the Manizola Library.

Documentary context and description

The volume presents 21 certified copies of documents requested by Rui Teles de Meneses (c.1560-1616) and made between 8 February and 18 July 1583. The copies were authenticated by a notary in Lisbon, and all confirm the ownership and the transmission of land, rights and jurisdictions in Parada do Bouro, Pousadela, Ribeira de Soaz, Unhão, Cepães, Meinedo and Gestaçõ by the ancestors of Rui Teles de Meneses from the end of the 12th century to the first half of the 16th century.

These records were gathered and bound later, which is most probably when the index in the beginning was also prepared. A non-certified copy of a document of 25 August 1586, in which Rui Teles chose a priest for St. Andrew's Church of Frades de Oleiros (Ribeira de Soaz), was added later, as well as several notes in the margins and some corrections in a very consistent hand throughout the book. The codex contains 149 folios, but 73 are blank. **FL**

9. Livro da fazenda do senhor conde meirinho-mor e rendimento della e dos seus papeis e outras lembranças

1588-1609

Unknown author

35 x 26 cm; [300] fl.; original full leather binding.

JBA (private collection, unnumbered document).

PT/JBA/ CJBA/01

Archival history

Written between 1588 and 1609, this inventory belonged to the Earls of Sabugals' archive until its incorporation into the holdings of the House of Palma through the marriage of the 3rd Countess of Sabugal with D. Nuno Mascarenhas da Costa in 1638. With the marriage of D. Beatriz Mascarenhas Castelo Branco da Costa, heiress to the title of Countess of Palma and Sabugal, to the 2nd Earl of Óbidos, the respective archives were merged into a single entity.

In 1836, this volume was described in the inventory entitled *Sumário alfabético dos documentos existentes no Cartório da (...) Casa dos Senhores Condes de Palma, Óbidos e Sabugal* (see nº 32 in this catalog).

With the death of the last Earl of Óbidos in 1945, the entire archive, including this volume, came into the possession of the Marquis of Santa Iria, next of kin and claimant to the title of Earl of Óbidos. Its subsequent fate is not clear.

The current owner bought it at the end of the twentieth century from a Lisbon antiquarian bookseller.

Documentary context and description

We are ignorant of who wrote this *Livro da Fazenda* (Book of Income) and why it was prepared, but the date 1588 places it shortly after Philip II, king of Portugal since 1580, granted the title of Earl of Sabugal to D. Duarte de Castelo Branco (1582).

The volume begins with an index that tells us that the contents are divided into three parts, the first dealing with the “income” of the house, the second with the “papers” and the third with the “memories”.

The book is organized by titles, listing the income, ownerships and property held by the house under each entail, as well as the documents that supported each entail's management, ensuring the maintenance of mercies and grants and the collection of rents, as well as the legal defense of rights and privileges. The income of the house is listed in detail, broken down by the amounts to be received from each property. The inventoried records are described according to 13 titles kept in 23 packets, corresponding to 252 sequentially numbered records within the packets and titles, along with 9 books. The third part, entitled “memories”, records expenses and purchases made by D. Duarte de Castelo Branco, as well as “the property and other things that are entailed, patrimonial and from the crown”, with information about each one and its respective obligations, as well as its location in the corresponding book of deeds. **ML**

Livro da fazenda do
snor conde meirinho,
moor & Rendimento
della & dos seus pape
is & outras Lembran
cas.

. 1.5. 8.8 .

Tauoada, do Rendimento 2

Tauoada, dos Papeis. 1

Tauoada, de Lembranças

10. Pecúlio do livro grande em que estão as doações e confirmações das igrejas pertencentes ao Viscondado

[1600 --?]-[1650?]

Unknown author

Available only as a digital object in the DigitArq database

<http://digitarq.dgarq.gov.pt/details?id=4344502>.

PT/TT/VNC/C/1220

Archival history

This short inventory was probably produced and kept in the northern charter-room (*cartorio*) of the Viscounts of Vila Nova de Cerveira, which was located in their palace in the village of Ponte de Lima. How and when the inventory came to Lisbon is unknown, but it was probably before the major destruction of regional archives that took place during the first decades of the 19th century as a result of the French invasions and the civil war between the liberal and the absolutist factions. Its subsequent history also remains unknown, although it seems to have been kept in the Lisbon archives of the Viscounts until the 20th century. After a history of loss and disappearance of archival material, a descendant of the last title-holder succeeded in purchasing large sets of pertinent documents at auction, and deposited his acquisitions in the National Archives-Torre do Tombo in 2000. Many documents – including all the inventories – were digitized before the *fonds* was reclaimed by the family in 2011.

Documentary context and description

The inventory consists of a finding-aid for a *Livro das confirmações*, a book containing dozens of authenticated documents, all of them pertaining to rights of patronage to churches in the diocese of Braga, dated from 1520 to 1535. The *Pecúlio* is organized by the place names of the churches, thus allowing the rapid retrieval of the legal copies, which were organized in the *Livro* by chronological order. The inventory is organized around a list of churches, pointing to the page numbers of the *Livro* “where documents concerning each one can be found.” This organization clearly suggests it was used for management of patronage over the churches. From the characteristics of the letters and hand, the inventory seems to have been produced during the first half of the 17th century.

MLR

11. Tabuada do cartório da Casa de Sortelha

1609

Gaspar Coelho Aranha

224 fls.; paper.

ANTT, Manuscritos da Livraria n.º 2603.

PT/TT/MSLIV/2603

Archival history

The custodial history of this inventory is mostly unknown. A note on folio 181v, dated from 19 November [19]58, says that the book belonged to Luís Lancastre e Távora (1937-1993), an expert in heraldry and sigillography; Lancastre e Távora descended from the Marquis of Abrantes's family, into which the House of Sortelha had entered in the 17th century. After Luís Lancastre e Távora's death, his collection was sold and dispersed. This volume now belongs to the collection *Manuscritos da Livraria* of the National Archive of Torre do Tombo. No additional information concerning this volume's acquisition is available, but a large set of the House of Abrantes' documents was bought by the National Archives on different occasions between 1975-1995; the fact that this particular book is not included in the "Casa de Abrantes" *fonds* may indicate that it was not acquired together with this major collection.

Documentary context and description


The inventory was produced in 1609 by Gaspar Coelho Aranha, and commissioned by the 3rd Count of Sortelha, Luís da Silveira (1578-1617). The author included an introduction in which he explained the organization of the archive and its importance, a first chapter in which he

presented the origin and ascendants of the Counts of Sortelha, a second chapter in which he described all the properties and benefits that belonged to them, and a third chapter in which he listed the pensions and annuities received by the 2nd Count Diogo da Silveira.

After these texts, the author began a sequential description of the documents in the archive, which were organized by location and by theme, and placed in what the author terms as *sacos* (bags). The first of these contained the documents related to the *morgadio* (entailed estate) of Góis. Then came, respectively, papers relating to: the village of Sortelha; properties in Oliveira do Conde; in S. Gião de Penalva; in Segadães; in Quinta (domain) de Calhariz and Casal de Galés; the chapel of Santa Cruz of Lisbon and properties of the Quinta da Pipa; Quinta da Graciosa; Alcácer; Elvas; properties in Lisbon; properties in Ponte de Lima and in Algarve; Ponte de Lima; Évora; Redondo; Pedra Alçada; and Terena. Finally, the archive included bags with documents belonging to churches under the family's patronage and ecclesiastical privileges conceded to the family.

Some time after 1609, the inventory was modified: the term "bag" was crossed out and replaced by "packet", some documents were re-grouped, and certain summaries were crossed out, corrected or added to. Additional packets with documents pertaining to Count Diogo da Silveira, along with letters, notes and several books, were also summarized, although some the folios containing this material are now missing (fls. 169 to 174). A table of contents, added before the introduction by Gaspar Coelho Aranha, also resulted from this (re)arrangement. Altogether, the volume presents 1249 abstracts, more or less developed, of documents and books produced between 1144 and 1638. **FL**



†

Taboada, do
cartorio.
da casa.
de, sor-
telha.
De
Feitor dos doutores Gaspar
Coelho, Br. prior
d'Attalaya.

12. [Inventário dos documentos do cartório de Ponte de Lima]

November 22, 1675 to April 30, 1677

Fr. Manuel da Guia and António Moreira

Available only as a digital object in the DigitArq database

<http://digitarq.dgarq.gov.pt/details?id=4343897>.

PT/TT/VNC/A/1409

Archival history

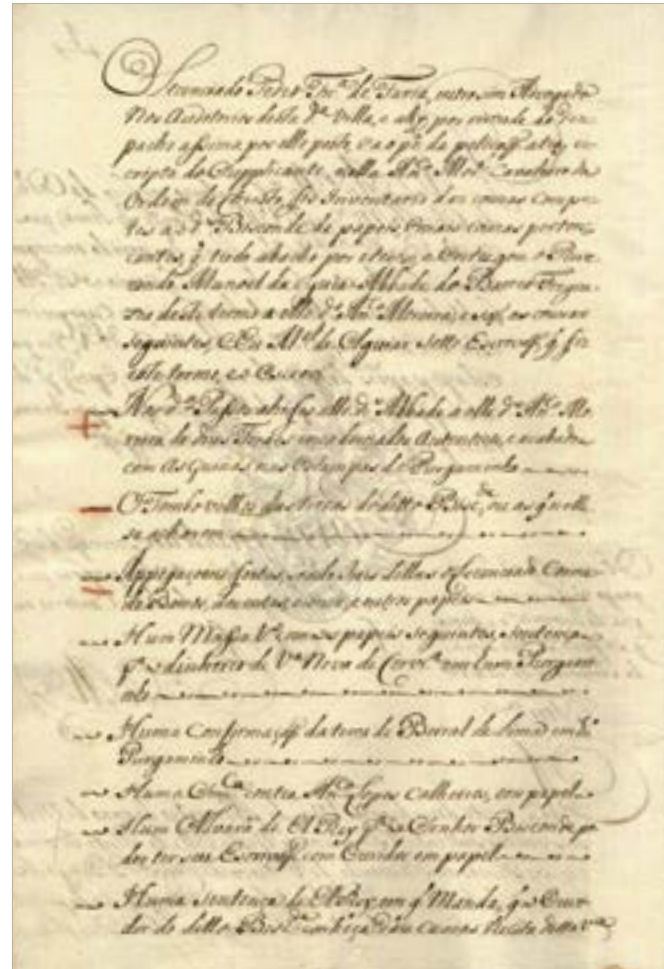
Production of this inventory commenced on 22 November 1675 in the palace of the Viscounts of Vila Nova de Cerveira, in the town of Ponte de Lima. It was motivated by a transfer of office among the Viscount's officials, namely the rent collector. The person entering service, António Moreira, requested on his master's behalf that his predecessor Fr. Manuel da Guia, transfer a formal inventory of the documents. The inventory was produced by a local scribe, who worked with the two officers for nearly one and a half years. Later additions continued at least until 1689. Some additions identify documents taken for the Lisbon archives of the Viscount and kept there; it should be noted, however, that they were properly identified in a list kept in the Ponte de Lima charter-room, a practice that reveals good archival management. How and when the inventory came to Lisbon is unknown, but it was probably before the major destruction of regional archives that took place during the first decades of the 19th century as a result of the French invasions and the civil war between

the liberal and the absolutist factions. Its subsequent history also remains unknown, although it seems to have been kept in the Lisbon archives of the Viscounts until the 20th century. After a history of loss and disappearance of archives, a descendant of the last holder of the title succeeded in purchasing large sets of pertinent documents at auction, and deposited his acquisitions in the National Archives-Torre do Tombo in 2000. Many documents – including all the inventories – were digitized before the *fonds* was taken back by the family in 2011.

Documentary context and description

The inventory was produced in the context of managerial reorganization. It portrays a large archive composed by nineteen bundles of miscellaneous documents, ten bundles of documents “concerning the churches” (mostly on patronage issues), one bundle of “extraordinary documents, that matter”, a list of mobile goods. Each bundle contained, on average, twenty documents. For each bundle, the inventory describes the documents one by one, although the summaries are short and undated. The inventory's primary aim seems to have been to acknowledge the correct transmission of the archives from one officer to the other. Nevertheless, it is now the only known list of documents for the northern archives of the Viscounts (although its last part mentions several other inventories and lists of charters, now lost). It also mentions an *escriptorio* (cabinet), where the charters were “kept locked”. A singular feature is the attention given to documents concerning patronage among other descriptive documents of holdings, signaling the importance of preserving documents that would enable the Viscounts to react to Church demands, always potentially strong,

owing to sophisticated ecclesiastical archival practices (see entry nr. 10). Several brief mentions in the inventory point to direct use by the Viscount Lourenço de Lima e Brito Nogueira, a singular character in the 17th century history of the family, who among many other features, worked hard on the House's reorganization after Portugal's recovery of independence in 1640, which split the family into two factions. The change of officers and the description of the archives was undertaken in this familial and larger political context. **MLR**



13. Relação de todos os papéis, instituições, mercês e títulos de fazendas e outras mais notícias que se acham no arquivo do excelentíssimo senhor D. Tomás de Lima, Visconde de Vila Nova de Cerveira

[c.1694 - 1755] (*)

Unknown author

168 fl. (95 fl. + 73 fl.); paper.

Available only as a digital object in the DigitArq database

<http://digitarq.dgarq.gov.pt/details?id=4343885>.

PT/TT/VNC/A/0209

Archival history

The *Relação* was made at a time when problems regarding succession to this family's titles and estates after the restoration of Portuguese independence had begun to subside. The Viscount who ordered the archival inspection that resulted in this document, Tomás de Lima (c.1694-1755), and his father undertook an active reorganization of their estates. Their activity is documented by an additional documentary product, a large land register named *Livro que contém o rendimento das minhas casas e morgados a elas anexos*. The Viscount had only one child, his heiress, who was already married at the time the *Relação* was compiled. It is therefore likely that he commissioned it, together with his contemporaneous effort to arrange the underlying archive, in the context of this breach of male succession, which could

explain its strong emphasis on the genealogy of the previous generations. In the following centuries, the document was copied several times, although the copies are now damaged and disconnected from the collection. The copy in question here was probably kept at the Viscounts' main Lisbon residence, the *Palácio da Rosa*, until the 20th century. After a history of losses and disappearance of archival material, one branch of descendants of the last title-holder succeeded in purchasing large sets of documents at auction, which they deposited in 2000 in the National Archives – Torre do Tombo. Many documents – including all the inventories – were then digitized, before the *fonds* was reclaimed by the family in 2011.

Documentary context and description

The *Relação* takes the form of a miscellany formed by lists of the family's archival documents, genealogical material, and historical narrations. Much of it concerned the various branches of families that had come into the House of Vila Nova de Cerveira, as well as lists of documents kept in the Royal Archives regarding these lineages.

The *Relação* opens with a Prologue expressing concern about the documents related to the House's *morgadios* (entails), and announcing the Viscount's intention to recover them by verifying, identifying and summarizing all available information. After the descriptions of the first three bundles of documents, however, long genealogical remarks and historical texts intervene. These were probably inserted, at first, in order to assist the user in understanding the properties' forms of possession and succession; however, they took on a greater and greater extent as the volume continues. This characteristic makes it uncertain whether the *Relação* resulted from a real and thorough reorganization of the archive, or whether the genealogical-historical mood expressed in these passages superseded the original intention as compilation continued. Rather than an inventory, some parts of the document ultimately more resemble the draft of a narrative of family origins and history, anchored in a presentation of the documentary evidence. **MLR**

(*) The document is not dated, but it mentions the reigning Viscount's daughter and husband, details that securely place it in the time of the 11th Viscount, Tomás de Lima.



14. Livro mestre que ensina a buscar os papéis do cartório de D. Filipe de Sousa

18th century [c. 1700-1714]

Unknown author

152 fls; paper.

ANTT, Microfilme 5500 (only version available, to be consulted under demand).

PT/TT/CPLM/E-A/2/3.

Archival history

This inventory, produced in the beginning of the 18th century, was kept by the descendants of Filipe de Sousa and of his son Manuel de Sousa (the heir of the House after the death of his brother Francisco de Sousa), and passed from one generation to the next until the present. It was deposited in the National Archive of Torre do Tombo between 31 June 2000 and 20 June 2006, together with other documentation of the *Casa Palmela*, where it was microfilmed before being returned to the current owner, Pedro de Sousa e Holstein Beck.

Documentary context and description

The volume's heading suggests that it is a master guide that explains how find documents in the archive of Filipe de Sousa (1666-1714), from the family Sousa of Calhariz that descended from a second son of the 1st Baron of Alvito.

The guide is not dated, but various evidence suggests it was initiated before the death of Filipe de Sousa, and was continued during the minority of his son and heir, Francisco de Sousa (1700-1729), whose name is mentioned at the beginning of the index referring to his *morgadios*. In this short index, the names of properties that belonged to his entailed estates are presented in alphabetical order from A to G; each entry also indicates the page of the volume where the respective documents are described. The first index is followed by a much more detailed onomastic index that is alphabetically organized from A to Z.

The documents were grouped by location or by subject, and put into packets which were described in the inventory: Monfalim, Santarém, Algarve, Calhariz, Apostiça, Azeitão, Palmela, Canha, Alentejo, Coina, Valada, Olivais, Fonte do Anjo, Anjos, “Properties of the Crown and Orders”, *Alcaidarias-mores* (governorships) and service as “Captain of the Guard”, Church patronage, houses in Lisbon, Guimarães, an additional packet with other documents, and books of discharges. The order in which the archive's contents are presented seems random, and there were many additions. Some summaries appear to have been written at different times in more than one hand. The entire inventory includes more than 1205 summaries of documents produced between 1424 and 1784. **FL**

15. [Alfabeto dos papéis e documentos pertencentes à Casa de D. José de Meneses e Távora]

1709

Unknown author

97 fls.; paper.

BNP, Reservados, Códice 11591.

PT/BNP/ COD/11591

Archival history

This index was produced in 1709, and was most likely kept by the family Meneses e Távora, who later became the Counts of Caparica and Marquises of Valada. Its custodial history is mostly unknown. It now belongs to the collection *Códices* of the *Reservados* of the National Library of Portugal, and only deeper research into the Library's own historical archive could provide more information on the document's pathway into the collection. The grandson of D. José de Meneses e Távora, D. Francisco de Meneses da Silveira e Castro, also prepared an inventory, probably in the last decades of the 18th century. Although incomplete, it is also in the National Library (see entry nr. 19 in this volume).

Documentary context and description

This codex was commissioned by José de Meneses e Távora (1663-1725), lord of Patameira. It includes summaries of more than 778 documents, with entries organized alphabetically from A to Z, usually by the name of the location of the properties. However, there are certain categories within each letter that derive not from the location,

but rather from the type or the name of the properties and the benefits associated with them, or from the type of document. Most of the documents summarized relate to the acquisition and management of the House's patrimony, especially the *morgadios* of Caparica, Oliveira, Patameira and Vimieiro. Other entries relate to the *Comendas* of Valada and Padrões, dowries, inheritance partitions, privileges and pensions given by the monarch, court decisions and the wills of family members.

After the alphabetical index, a list summarizes 12 books, followed by an entry entitled "Oliveyra" in which more documentation on the entailed estate of the same name is described. The inventory shows signs of revision, since at the end, an erratum notice is appended. Summaries are generally very brief, and rarely indicate the date of the underlying document, although some provide information that allows us to determine an approximate date. It is possible that some inventory entries were added after the index was originally compiled, because they display different hands and ink colors. The book's title page is decorated with the arms of the family, and decorative elements mark the beginning of each entry. **FL**



Uma Escriuira feita

a Antonio Francisco de Ca-
 sal das Lendas.

1.

Humas memorias de Lendas
 das Escriuuras que es-
 tao na horta do Arcebispo pertencentes ao Mosteiro
 de Sta. Quaryta.

2.

Lembrança das que estão na Igreja do Ca-
 valheiro.

3.

Carta de venda de huma Villa & terra, digo
 de humo Carteiro no limiar de S. Pedro.

4.

Humas cartas de venda que fez Vasco Alfen-
 ar com permissão de sua Mulher de duas Co-

16. Tombo com as varias rendas e todas as fazendas prazos (...) e foros que pertencem a esta caza em que meu pay, e senhor Pedro de Figueiredo se achava de poçe athe se faleçimento e distintamente as quantias por que cada hua das ditas fazendas neste anno de 1722 se achão arendadas e a quem como tambem as penções capelas encargos e foros que as sobreditas fazendas estão obrigadas e inventario de todos os papeis que se acharão.

1722

Unknown author

118 folios; paper.

ACBL, cx.47, nº1.

PT/FCC/ ACBL/07/02/01

Archival history

Made soon after the death of Pedro de Figueiredo by his son and heir, Rodrigo António de Figueiredo, this inventory contains a description of the estate with its income and expenses, and a list of all documents pertaining to it that were in the Figueireidos' possession. Until the beginning of the 19th century, the 1722 inventory was the main finding aid for this archive's documents, when it was replaced by a new and updated one. It remained in the archive after it was superseded, and was mentioned in the new inventory. The division of documents between the heirs at some point in the 19th century resulted in the separation of this inventory from the documents it describes. In the late 20th century, it was recovered from a family house where a portion of the archive was kept.

Documentary context and description

The inventory has three parts: (1) properties and their incomes; (2) obligations pertaining to each property, including the form of acquisition by the family of each plot of land and/or entailed estate; (3) a list of documents (not numbered) with packet numbers and their respective location in numbered drawers. The list comprises 960 items that correspond to 106 numbered packets. The original organization provided only for numbered packets or folders, but at some point in the 18th century, a new arrangement of the packets took place: two cabinets (*contadores*) with 8 drawers each became the repository for the packets. Subsequently, for each document the drawer number (from 1 to 16) and the cabinet number (1 or 2) was added to each entry. The inventory also makes reference to one drawer with separate documents, and to certain important documents kept in a safe apart from all the others.

No single main criterion was used to organize documents or the inventory: we can see geographical organization in some cases (by each entailed estate), but also typological organization in other sections. Some documents are distributed according to no visible criteria at all. Some document summaries are quite imprecise, while others include complete information regarding places, names and dates.

The book was created with blank spaces on purpose, in order to allow constant updating with entries for newly created or acquired documents. Marginal notes, additions, corrections and changes made by different hands are frequent in several registers, making it clear that the inventory was used and added to throughout the 18th century until 1807. **MJC**

193-

TOMBO

COM VARIAS RE
TODAS ASEZENL
DAS PRAZOS BEN
FOROS QUE PERTENC
TACAÇA EN QUE MEV
E SENHOR PEDRO DE FIGUEIRE
DO SEACHAVA DE POSSE ATHE
SEV FALECIMENTO EDISTIN
CTAMENTE AS QVANTIAS POR
Q CADA HVA DAS DITAS FA
ZENDAS NESTE ANNO DE
1722 SEACHAÃO ARENDADAS
EAQVEM CONETANBEM AS
PENCOES CAP. EN CARGOS E
FOROS AQ. AS SOBRED. FAZ.
ESTÃO OBRIGADAS E INVENTA
RIE DE TODOS OS PAPEIS Q SEACHA
RAO.

17. [Inventário dos títulos relativos aos bens pertencentes aos Morgados administrados pelo Conde de Avintes]

18th century [c. 1725-1753]

Unknown author

125 fls.; paper.

BNP, Reservados, Manuscritos, Cx. 186, docs. 2-12, 15-25 e 33-35.

PT/BNP/MSS/186/25

Archival history

The inventory was probably produced before António de Almeida Soares Portugal (1699-1760), 4th Count of Avintes (1725) and 1st Count of Lavradio, became the 1st Marquis of Lavradio in 1753. António de Almeida Soares Portugal appears in the summaries as *Conde do Lavradio* (Count of Lavradio) but never as *Marquês* (Marquis) of the same title. It should be noted that since the inventory is not complete, this is only a hypothesis. A deeper study of the history of this family archive and of its dispersion could bring more certainty, and also shed additional light on the family's apparently strong relationship with its archives. Also useful would be a closer examination of two other related inventories recently found in private hands. The first of these was prepared in 1801, most likely under the 3rd Marquis, grandson of the 1st Marquis. It was probably sold at auction in the 20th century, and later purchased by its current owner, a descendent of the last Marquis of Lavradio. The second one is a draft now located in the Historical Archive of the Patriarchate of Lisbon (cx. 48, n.º 6023), which catalogues certain documents that it describes as absent from yet a third

inventory (which has not been found). The second inventory describes the third as “a list prepared by the 2nd Count of Lavradio”, Francisco de Almeida (1796-1870). The inventory studied in detail here probably remained continuously in the possession of the Almeida family, passing from generation to generation, until the family started alienating the archive's contents in the 1930s. It was bought by the National Library of Portugal in 1938.

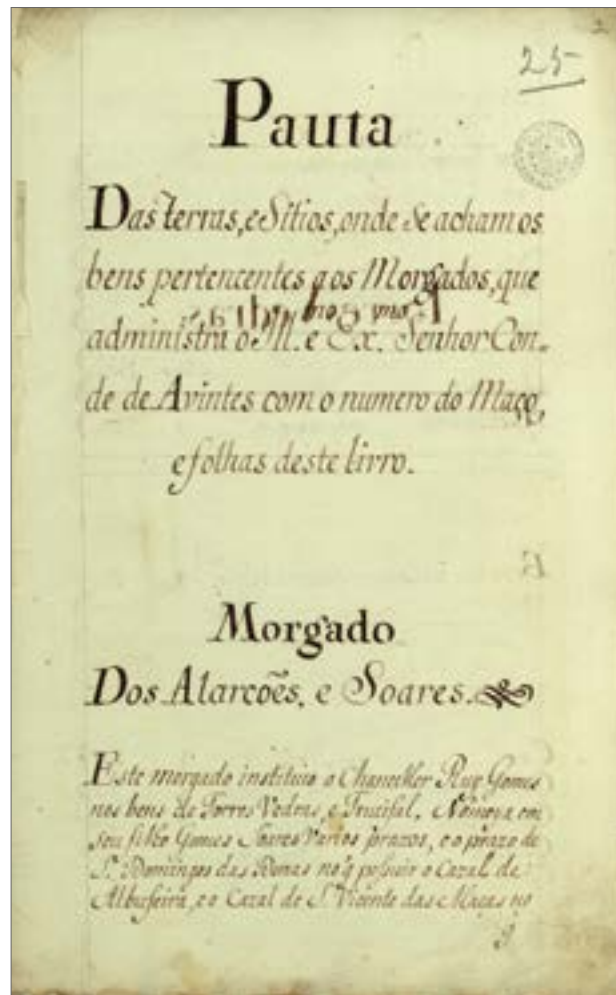
Documentary context and description:

The inventory is fragmentary, incomplete and kept out of its original order. It begins with a guide and a table of contents, thanks to which the structure of the inventory is visible, even if some parts are now lost. The *morgadios* (entailed estates) managed by the Count of Avintes came first, with brief descriptions of each one, its location and the properties it involved. Endowed chapels followed, and then a section about the village of Belas. The subsequent divisions of the inventory were organized by types of document, including papal documents, *comendas*, dowries, inventories and property

divisions, privileges, annuities, wills, letters, receipts and other papers. The introductory material makes it possible to rebuild the original order of the inventory, and to confirm that descriptions of the documentation of the *morgadios* of Airão and Avintes are missing.

In each part of the inventory, after the summary of a document, the entry provides the packet to which it belonged and its number, always presented sequentially. The sections dedicated to *morgadios* and chapels also follow the same order of composition: first come the summaries of the records related to the institution, including descriptions of the founders and owners or managers; then come the summaries of the documents related to acquisition, ownership and management of individual properties that the institution held, organized by the location and by the type of each property. The section about *comendas* is organized by the name or other designation of the properties in commendation; the one about annuities is organized by the name or other designation of the entities that provided the annuity.

The inventory catalogs more than 758 summaries of documents that were produced (for those that are dated) between 1415 and 1753. **FL, MLR**



18. Índice do cartório de D. Brás da Silveira

1782

José Joaquim dos Santos Vila

198 fls., without cover; paper.

BNP, Reservados, Códice 10972.

PT/BNP/ COD/10972

Archival history

This inventory was produced in 1782. Although its custodial history is largely unknown, it was most likely kept by the family Silveira in the following generations. It now belongs to the collection *Códices* of the *Reservados* of the National Library of Portugal. There is some possibility that the document entered with others belonging to the *fonds Condes de Resende*, which derives from a titled house connected with some of the descendants of Silveira e Lorena, but only deeper research would bring greater clarity.

Documentary context and description

The inventory was made by José Joaquim dos Santos Vila and commissioned by Nuno Gaspar de Lorena (1705-1789), Brás da Silveira's father. Some of its parts are missing or out of order; for example, fls. 245 to 274 are not bound in the correct place.

The volume begins by listing three *morgadios* (entailed estates) of the House – one instituted by Lourenço Leitão, another instituted by Baltasar Leitão de Azevedo, and a third at Niza – and the properties that belonged to each. Each entry gives an indication of the book or packet where the documentation of the *morgadios'* institution and

confirmation of ownership was located. Successive sections of the inventory include summaries of: wills of family members, documents related to the partition of estates (*cartas de partilhas*), certificates and court decisions, dowries, annuities, and documents concerning the Lezíria de Alcamé (Vila Franca de Xira).

Beginning at folio 95, the author initiates a second part of the catalog, organized by geographical criteria. It describes documentation related to the acquisition, ownership and management of properties of the House, first those situated in different quarters of Lisbon, then properties on the island of Santa Maria.

At folio 151, another section of the book begins, organized by geographical criteria and by the content of the documents. This section contains descriptions of documentation regarding the acquisition and the management of properties in Campo Grande, Sintra, Santarém, Ribeira de Canha and Benavente, Enxara dos Cavaleiros and Enxara do Bispo, Castelo de Paiva, and Loures. It also contains document descriptions relating to the *alcaidaria-mor* (governorship) of Viseu, annuities and discharges of debts, court decisions, *comendas* (military land grants), and land rentals.

The inventory ends with four indexes, although these were not all completed. The summaries are generally well developed, although many do not indicate the underlying document's date; for documents that are given a date, the original production ranges between 1480 and 1775. The manuscript seems to have been made in different phases, since there are slight changes of structure and in the presentation of information. There are also some additions, probably made after 1782, in a different hand and ink color. **FL**

Indes

Do Cartorio do Ex.^{mo} Sr.
D. Brás da Silveira

O qual mandou fazer seu Rey
O. M.^o Sr.

Nunc Saguar de Linnua

per
Sua Magestade do Brasil e Ilhas



1782

19. [Inventário dos documentos relativos aos Morgados da Patameira, de Oliveira e de Caparica]

18th century [c. 1783-1793]

Unknown author

111 fls.; paper.

BNP, Reservados, Coleções em organização, cx. 33, Morgado de Caparica.

PT/BNP/CO/33

Archival history

This inventory was probably produced between 1783 and 1793, and was most likely kept by the family Meneses e Távora da Silveira e Castro, passing from one generation to another. Its custodial history is mostly unknown until its acquisition by the National Library of Portugal.

The grandfather of D. Francisco de Meneses da Silveira e Castro also prepared an inventory, in 1709, which is also in the National Library (see entry nr. 15 in this volume).

Documentary context and description

This inventory is incomplete, because some of its parts are missing. It was probably produced between 1783 and 1793: the former date represents the most recent summaries the inventory contains, and the latter was the date when Francisco de Meneses da Silveira e Castro (1754-1834), lord of Patameira and the most likely originator, was nominated Count of Caparica.

The inventory presents over 500 summaries of documents produced between 1305 and 1783, described in two different lists.

The first is a geographical index in which the names of locations referred to in documents are alphabetically organized from A to V. Under each location, the abstracts are presented alphabetically by the type of the document, and then secondarily according to chronological order.

The second index combines the names and titles/positions of individuals mentioned in the documents. It is also alphabetically organized, but only from A to D, indicating that the final part is probably missing.

The summaries presented are generous, generally indicating the full date of the documents and their reference numbers in the family archive. Some additions and notes were made in the text through the years after its original production. **FL**

20. Inventário dos documentos que compõem o cartório da Casa de Alvito

1784

Unknown author

105 fls.; paper.

AHCB, Manuscrito 2645.

PT/FCB/ AHCB/Ms.2645

Archival history

This inventory was produced in 1784, and was most likely preserved by the descendants of José Lobo da Silveira Quaresma, passing from one generation to the next. Its later custodial history is unknown, particularly how it came to be incorporated into the historical archives of the House of Braganza. As a hypothesis: José Lobo da Silveira Quaresma, the 4th Marquis of Alvito, sold his mansion to King Carlos some time between the end of the 19th century and 1908, and it is possible that the inventory was in the house when it was delivered to the Fundação da Casa de Bragança after the death of Marquise Carolina Duarte in 1936.

Documentary context and description

The inventory was commissioned by Maria Bárbara de Meneses, Marquise of Alvito, the guardian of her children and the manager of the estate of her eldest son, José António Plácido Lobo da Silveira Quaresma (1769-1844).

The volume begins with an introduction in which the author (who does not identify himself) explains the organization of the archive and the inventory. After a table of contents, the 18 packets in the archive are sequentially described. Some were organized according to geographical and alphabetical criteria: in packets 1 to 11, the names of the localities of the properties of the House mentioned in the documentation are generally arranged alphabetically, from “Alcácer do Sal” to “Viana.” However, under some headings such as “Alvito and lands of the barony”, several subheadings are organized according to the contents of the documents.

Other documents not related to the lands of the House are summarized in this inventory under headings based on their contents, including wills, documentation about *comendas*, positions, titles, annuities and privileges received, and receipts. The archive also preserved some documents that did not concern the House. All of these instruments are found mostly in packets 11 to 18, although some were also in other packets, because summaries of the same documents are in some cases repeated under different headings.

Under each heading and subheading, the entries are organized according to the type of document and in alphabetical order.

The summaries are mostly well developed, regularly indicating the date, the reference number of each document, and some notes about its authenticity (whether it was an original, a certified copy, or an authenticated copy). The majority of the described documents were produced between the late 13th century and the year 1783. After 1784, some notes were added, as well as brief summaries of documents produced in the 19th century. **FL**

Exposição

Dendome incumbida a
atuação dos Documentos de que se compoem o Car-
teiro da Ex.^{ma} Casa de Alentejo pela M.^{ta} e Ex.^{ma} Senhora
D.^{na} Maria Barbara de Alencar e Albuquerque
de mesmo Titulo como Jureta e Administradora das
Pousas e bens de sua Ex.^{ma} Filha e principalmente de
Pousas e Ex.^{ma} Senhor D. João Antonio Pinho
Lobo da Ilha de Quarenas como Escrivão da dita Ex.^{ma}
Casa, fez o Inventario subsequente dos ditos Documen-
tos separando os termos por ordem alfabética e distribu-
to de Alentejo e outros termos desta Realma segundo os pa-
raes costumeiros de bens de realme analogos ao seu cartão
de, e os que não foram respeito a terras lras transmitti os de-
mandas de terras de entres, titulos confirmas, ou em contrato
para com facilidade serem arrolados os Povoações que
se se procurarem.

Multiplicados alguns d'annuaes por que os
Documentos foram respeito a d'annuaes particulares e os trans-
mitti nos lugares que não poremam respectos.

Salvo os que não porem se saber finalmente e logo em q.
ano.

Inventario

Das Documentos de que se compoem
o Carteiro
da Ex.^{ma} Casa de Alentejo

Feito per Ordem
da M.^{ta} e Ex.^{ma} Sr.^a D. Maria Barbara
de Alencar, Marguiera de mesmo Ti-
tulo, como Jureta e Administradora
das Pousas e bens de sua
Ex.^{ma} Filha

Distribuido na forma declarada
na seguinte Exposição,
e scripto no

Anno de
1784



21. Index geral do cartório da Casa da Lapa¹ 1804-1805

José de Almeida e Vasconcelos

One 'armored' set of 3 vols. (from a set of four, of which the first is lost), bound in elaborate decorative cover with embossed arms of family in metal; 425+ 442+ 445 fls.; paper. Second 'simple' set of 3 vols. (from a set of four, of which the first is available only in a partial contemporary reproduction), bound, 530+476+376 fls; paper.

ACCL (private collection, unnumbered document).

PT/LCSM/ ACCL/IG02-04

Archival history

The volumes of the 'armored' set were kept at the Lisbon house of the Viscount and Counts of Lapa for several generations. Other contemporary records testify to these volumes' archival use, as well as to aristocratic pride in displaying them. Their sumptuousness even merited a specific mention in the Viscount's will (1812), which noted that the archive, its organization and the four indexes and *mostrador* (inventory) "has commanded everybody's admiration". The simple set resided at the main house of the Lapas' properties situated outside the capital, as shown by an 1816 inventory of the family estate in S. Pedro do Sul that mentions "three indexes" and their *mostrador* (finding-aid). In 1825 the Count of Lapa also referred to a set

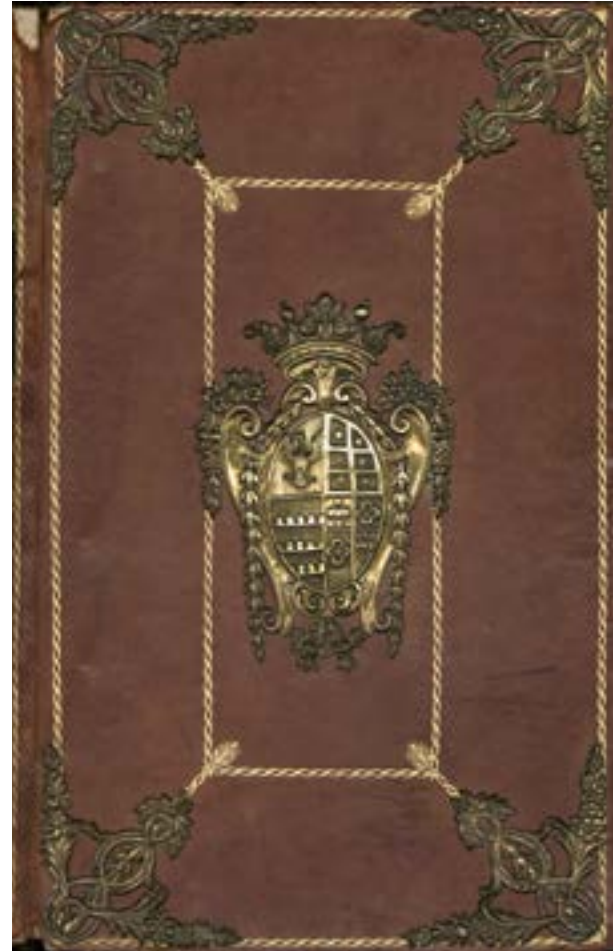
of four inventories, not seven, which suggests that the two sets were kept in different locations. The Lapa archives were kept entire in the family throughout the 19th century and the first half of the 20th century, though the extinction of entails and other privileged properties caused the removal of many of the now 'useless' documents to remote storerooms, thus hastening a general decline into oblivion. Many of the documents seem to have been sold or lost, and only a few remain in the possession of the present descendants of the family, together with the inventories and some other books of larger dimension and of apparatus. The owner of inventories described, a grandson of the last Earl of Lapa, has for decades continuously sought to reassemble the family archive by various means.

Documentary context and description

At the beginning of the 19th century, the first Baron of Moçâmedes and first Viscount of Lapa entrusted his illegitimate brother with the task of cataloguing of the family estates. The *codices* that his brother produced between 1804 and 1805 also involved a methodical rearrangement of the House archive itself, since the books' entries indicated where in the library the documents were to be found. The final result, known as *Index Geral*, consists of four large volumes organized according to the family's estates, with a section for each, such as Albergaria e Morgado de São Paulo do Criz, Moçâmedes e Honra de Lamaçais, and Viseu. Each of these sections contained different types of documents (tenements, property acquisitions, judicial decisions, wills, etc.), and under these subdivisions provided document summaries and information on their position in the family's library,

in which both documents and bundles were numbered. The criteria by which the estates are ordered seems to be genealogical, a feature that makes this inventory especially interesting. In fact, the first volume consists of a long genealogical presentation of all the family's branches (but its exact nature, as well as its relation to the estates, needs further research because the existent document is only a partial copy). The choice of genealogical order, however interesting and organic, was not practical, and a *mostrador* (finding-aid) is also included to help with the retrieval of documents. This inventory is unfortunately lost, but its functionality is proved by the fact that several others were produced by the Viscount's son, the 1st Earl of Lapa, who also was a careful manager of his family estates according to what might be called modern ways, which included more extensive use of the archive (see entry number 30). **MLR, LH, LSM**

¹ The set is known as "Índice Geral"; each volume has slightly different titles, according to the nature of the documents summarized.



22. Tombo do Cartório da Caza-Tombo

de todas as propriedades, Terras, Foros e rendas da Caza do
Ilustríssimo e Excellentíssimo Senhor D. Vasco Manoel de Figueiredo
Cabral da Camera, 1º Conde de Belmonte, Do Concelho de S.A.R. o
Príncipe Regente D. João Nosso Senhor, seu Porteiro mor, Gentil
Homem da sua Real Camera, Prezidente do Tribunal da Junta da
Admenistração do Tabaco, Deputado da Junta dos Três Estados do
Reino, Alcaide mor das Villas da Sertãa e Pedrogão, Comendador das
Comendas de S. Pedro de Merlim, S. Salvador de Castelões, S. Thiago
de Besteiros, S. Pedro de Babe, e S. João Baptista de Sinfães, todas
na Ordem de Christo e Senhor Donatario dos Maninhos da Covilhã.
Ordenado pelo dito Senhor no anno de 1807. Volume I.
Volume II: Index de Todos os Papéis do Archivo da Caza.
1807

Unknown author.

2 bound volumes; 454 p. each; paper.

ACBL, lvº 51; lvº 52.

PT/FCC/ ACBL/09/01/01

Archival history

The inventory was made before the departure of the family of the Earl of Belmonte to Brazil in 1807. This inventory has remained with the most part of the documents it describes since its creation.

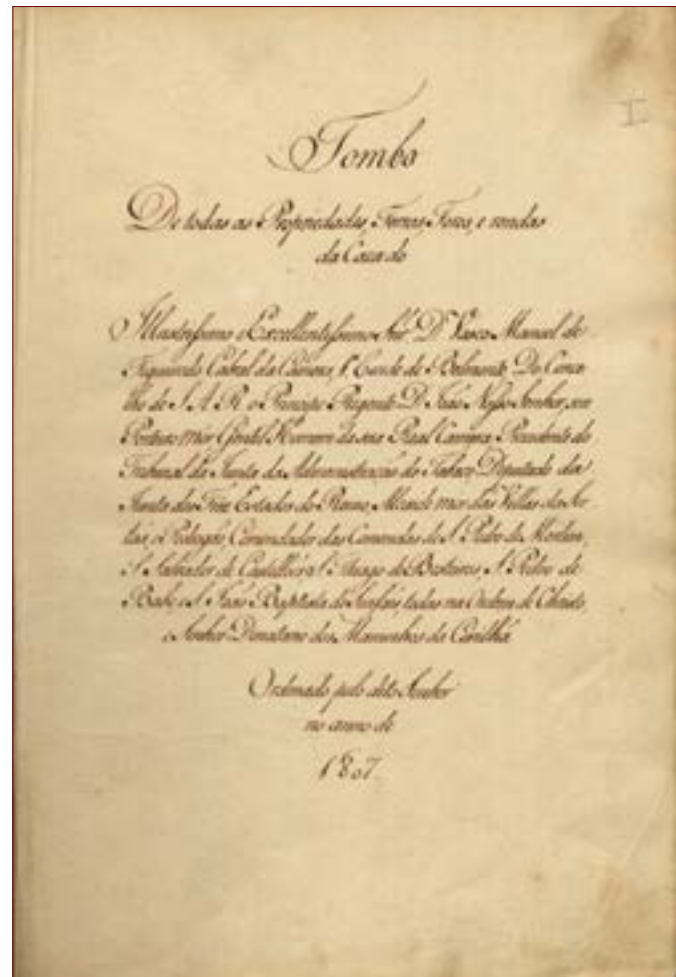
Documentary context and description

This document, labeled as a *Tombo* or register, consists of two volumes. The first volume begins by identifying the proprietor who commissioned it, the 1st Count of Belmonte, and continues by describing the family's *morgadios* (entailed properties), their history and origins, and the obligations that adhered to each one, including fiscal dues and spiritual duties. In order to explain the origin of some properties, several family trees are included.

The second volume lists individual documents in the archive, providing considerable detail: most entries include the names of producers, recipients, notaries, magistrates or other personnel that were involved, as well as dates and places. Each entry includes a reference to a bundle and the number of a file. The organizational criteria are geographical, typological and thematic. Some 1200 documents are distributed among 41 folders. Each entry provides a specific title, such as: chapels,

donations, wills, deeds of purchase or sale, etc. Some documents were stored separately according to their material composition, in a so-called parchment drawer containing 72 parchment documents. The inventory also describes a separate cache of documents (69 items) sharing no visible criteria, marked with only a number and no attributed folder. A list of 29 genealogical tables is also registered in this inventory, but with no reference to number or bundle. The second volume also contains an index to all the documents in the family archive, comprising 291 pages, of which 239 are filled. The inventory does not provide information about the location or armoire where each document was supposed to be placed.

Starting with the family tree of the Figueiredos, the source of a large part of the family's properties, the inventory reveals the genealogy of the relevant branches, the history, origin and list of dues pertaining to each entailed estate, and palaces and free lands derived from various sources. In addition, the inventory entries document property that came through other family branches by marriage or by inheritance. Cross-references to the indexed documents establish connections between the two volumes. **MJC**



23. Inventário geral dos papéis que se acharam por falecimento do Principal D. António Xavier de Miranda Henriques

14-07-1815

João Filipe da Cruz

216 fl.; paper.

ANTT, Feitos Findos, Livros dos Feitos Findos, liv. 246.

PT/TT/ LFF/0246

Archival history

The inventory was first preserved in the *Casa da Suplicação's* archive, where it was kept until this institution was extinguished in 1832. The documents conserved in that archive were then collected and reorganized by the *Comissão dos Cartórios dos Juízos Extintos*, and distributed among several repositories until they arrived at the National Archives, where they remain. Today, those documents are distributed among different *fonds* at the National Archives, including the *Livros dos Feitos Findos*, where the inventory itself can be found.

Documentary context and description

The inventory was made after the death of António Xavier de Miranda Henriques, heir of the second Count of Sandomil, who could not inherit his family's *morgadios* (entails) owing to the fact that he was a cleric. Following a long judicial process, the entails were distributed

among several relatives, making it necessary to ascertain which documents preserved in António Xavier's archive belonged to whom. The inventory was therefore created with the purpose of listing all documents, so that they could be delivered to their new owners. The task was entrusted to the expert palaeographer João Filipe da Cruz, who chose to reorganize the registry by type of document (testaments, certificates, donations, etc), with each type corresponding to one or more packets. Most documents were then numbered and briefly described in the inventory, with references to their content and year of production. Only the documents considered “interesting” received such treatment, however. The rest were either stored in packets without being described – the ones deemed “insignificant” – or burned and destroyed because they were thought to be “entirely useless”. **RN**

24. Índice geral e alfabético do cartório da Casa de Ficalho

1817

João Filipe da Cruz

266 fls.; paper.

ACF (private collection, unnumbered document).

PT/FM/ ACF/IN01

Archival history

This inventory was produced in 1817, and was subsequently kept by the descendants of Eugénia Tomásia Maurícia de Almeida, Countess of Ficalho and the first Marquise and Duchess of the same title, from one generation to the next. It remains in the possession of the family Melo of Serpa.

Documentary context and description

The inventory was composed in 1817 by the priest João Filipe da Cruz in Lisbon, at the request of Eugénia Tomásia Maurícia de Almeida (1784-1859) while she was the guardian of her son, António José de Melo (1806-1893), and the administrator of his estate.

The book begins with a table of contents; the following pages summarize over 1752 documents produced between the early 16th century

and the year 1817. The documents were kept at the time in packets numbered 1 to 22 and 27 to 29.

Document descriptions are divided into 79 categories, alphabetically organized (the only exception being the category “Letters” placed at the end of the inventory). The summaries within each typology are, in most cases, in chronological order. The packet and the number of each document is provided; entries sometimes specify if a copy is also present, since some paleographic transcriptions of documents were also in the archive (Pkts. 23 to 26). The inventory ends with a brief conclusion.

Throughout the inventory, added notes appear, along with an appendix and a correction to the chapter “Letters”, which was made much later by Maria das Dores de Eça de Queirós (1918-2004). **FL**

25. Livro Geral do cartório de D. Tomás José Xavier de Lima,

2.º Marquês de Ponte de Lima, no qual se contém todos os títulos e padrões, morgados, senhorios, propriedades, quintas, fazendas, foros, casais e mais rendas, privilégios, bulas apostólicas, testamentos e outros bens que pertencem à dita casa. Tudo extraído dos originais, títulos e mais documentos que no dito cartório se acham mando (sic) por ordem do dito senhor em Julho de 1819

1819

Unknown author

The document is available only as a digital object in the Reading Room of the National Archives (to be consulted under demand).

PT/TT/VNC/A/0001

Archival history

The inventory describes only documents located in the Lisbon charter-room of the family, as far as can be determined (many of its document descriptions are quite generic). Considering the year in which it was compiled, it belongs in a wider context of noble families' archival reorganizations throughout Portugal at the time. Lacking the technical quality of many other contemporary inventories, it reveals little mastery of archival techniques; possibly, it represents a first draft. It was probably kept in the Vicounts' main Lisbon residence, the Palácio da

Rosa, until the 20th century. After a history of loss and disappearance of archival material, a descendant of the last title-holder succeeded in purchasing large sets of pertinent documents at auction, and deposited his acquisitions in the National Archives-Torre do Tombo in 2000. Many documents – including all the inventories – were digitized before the *fonds* was reclaimed by the family in 2011.

Documentary context and description

In the first section, the inventory describes in a succinct manner the 38 bundles in the charter-room, following an apparently miscellaneous order with respect to documentary typologies, subject matters and places. The first 12 bundles and a few others are quite well described, with summaries of all the documents, assignment of subjects or typologies, and apposition of reference numbers. All the other bundles are described in a much more general manner, and some are not described at all. This seems to point to a preliminary or unfinished work. What is clear, however, is that the bundles with better descriptions are the ones comprising documents about the Brito Nogueira *morgadios* (entails). This pattern continues older traditions of archival use and description, as well as past practices; what is new, however, is the importance given to the record of royal donations, which most probably resulted from their growing importance to the family. **MLR**

Livro Geral

De Cartorio do M.^o e C.^os
Mestre Dom Thomaz de Siqueira de Sousa,
D.^o Marquez de Pôrto de Sousa

No qual se Contem todos os Autos e
Processos, Negocios, Inherentes, Especificados,
Liberes e Relativos, Foyes, Causas, e mais Autos,
Procurações, e Praticas, e p^ossesões, e Licenças, e
outros, Deves que pertencem a dita Causa.

Foyo este Livro do Original, e Foyo assim Removido
p^ora o Cartorio actual, e mandado fazer por Ordem do
mesmo Mestre

Em Villa de 1819.

26. Collecção de todos os Tombos,

Livros do Celleiro, Escripturas, Documentos e mais títulos pertencentes ao Ex.mo Morgado de Freiriz e de Penegate. Oferecida ao Ill.mo e Ex.mo Senhor Conde da Feira, donnatario e senhor dos ditos coutos, morgado de Freiriz e de Penegate, Grão Cruz na Ordem de S. Thiago, commendador na Ordem de Christo, tenente general dos Reaes Exercitos e do Conselho de Sua Magestade pelo seu Juiz do Tombo João Jeronymo do Coutto de Castro e Souza no anno de 1821 1821

João Jerónimo do Couto de Castro e Sousa

[2], 30, [5] fls.

BNP, Reservados, Arquivo Almada Lencastre Basto, Avenida de Roma, caixa 111, n.º 176

PT/BNP/ ALB/AVROM111176

Archival history

This book was elaborated in 1821 by João Jerónimo do Couto de Castro e Sousa, *juiz do toambo* of Freiriz and Penegate, at the request of the Count of Feira, Miguel Pereira Forjaz. After the original proprietor's death, the document came into the possession of his sister, Maria Joana Monte Forjaz Câmara e Meneses Coutinho de Sá Magalhães Resende, married to João José de Almada Melo Velho e Lancastre, 3rd Viscount of Vila Nova de Souto del Rei. The book remained in this substantial family archive until it was sold to the National Library of Portugal, in the 1970s, where it was named after the last proprietors, Almada Lencastre Basto.

Documentary context and description

The document was produced during an archival reorganization in 1812 by João Jerónimo do Couto de Castro e Sousa, *juiz do toambo* of Freiriz and Penegate, at the request of the 9th Count of Feira, Miguel Pereira Forjaz. It partially describes the documents held by the Counts of Feira. Divided into three chapters, it summarizes about 248 documents concerning the *morgadios* (entails) of Freiriz and Penegate, produced between 1460 and 1815. The first part lists the *tombos* and *livros do celeiro* (fls. 2-3) in the archive, followed by a list of contracts in a geographic and chronological order (fls. 4-26v). In the third part, the book lists a number of acts and sentences pertaining to the *morgadio* of Freiriz, and other documents such as provisions or genealogical notes (fls. 27-28v). Abstracts are usually brief and not always dated (but in some cases more information is provided, allowing approximate dating). All summaries are numbered, but nothing indicates any relation between these numbers and the location of these charters in the Feira archive. The book ends with a general index of its contents and with an epilogue by João Jerónimo do Couto de Castro e Sousa, protesting the loss of several documents before 1812, in part because the archive was open to everyone who needed to consult it. **AG**

5

Collecção

De todos os Tombo, Livros de Cellauro,
Escrituras, Documentos, e mais Titu-
los pertencentes Ao Ex. Morgado de
Freyria, e de Penegate.

Offerecida

AO Ill.^{mo} Ex.^{ma} Senhor Conde da Fria,

Donatario, e Senhor dos ditos Coutos, Morgado de
Freyria, e de Penegate, Voz' Cria na Ordem do Thi-
ago, Commendador na Ordem de Christo,
Tenente General das Reas Exerci-
tos, e do Conselho de Sua
Majestade

Pelo

Seu Juiz do Tombo

Joaõ Jeronymo de Couto de Castro, e Souza

No Anno de

1821



27. Índice dos documentos pertencentes à Casa que administra Francisco Trigoso de Aragão Morato no termo de Lisboa e suas anexas

1825

Francisco Manuel Trigoso de Aragão Morato

92 fls. ; paper.

ANTT, Família Saldanha e Castro e Falcão Trigoso,

Liv. 1 dos índices (provisional accession nr).

PT/TT/ FSACR/LIV1/01

Archival history

This index was produced in 1825. It passed, with other documents and properties of the family, to Emília Augusta Trigoso de Oliveira Pereira Homem de Magalhães, niece of Francisco Trigoso. The transmission continued from one generation to the next until 2007, when it was deposited by contract at the National Archives of Torre do Tombo.

Documentary context and description

This is the first index of a set of three, grouped in a codex organized and written by Francisco Trigoso (1777-1838) in Loures between 1825 and 1826. It catalogues documents relating to properties located in Lisbon's surroundings, and their annexes, which Trigoso administered.

The index is divided into two parts. The first part consists of 23 headings, each of which corresponds to a specific property of the House. Beneath each heading are described documents relating to its acquisition, ownership and management, as well those for its annexes and the associated rentals (fls. 1 to 53). Within each subdivision, the summaries are chronologically ordered, with undated references appearing at the end of each list. Summaries are quite generous and, in most cases, also indicate the full date of the document. This section of the index includes 379 abstracts of documents produced between 1431 and 1845.

The second part catalogues nuptial contracts and dowries, wills and inheritance partitions, some inventories, certificates, receipts of dowries, and judicial decisions (fls. 54-69). It contains summaries of 63 documents produced between 1526 and 1826, plus one from 1839, which was added later. This section of the index includes important references to the *legítimas* (inheritance portions, paid periodically) of Trigoso's nieces, Emilia and Maria Luísa Trigoso, with very detailed notes about all the income sources, and to the *carta de partilhas* (inheritance partition document) pertaining to Mariana Trigoso. Abstracts are detailed and are chronologically ordered. Some notes, corrections and summaries were added after 1826 by the author or by another person. **FL**

India

by Document, particularly a Copy of
Articles in favor of the
Company

Articles of the Company, a particular Copy of
Articles, by the Company, as regards the
Company, yet also relating to the
Company

Articles, a Copy of the Company and
the Company of the Company, as regards the
Company

1625.

Francis Manuel Vazquez de Arce

28. Índice dos documentos pertencentes à Casa que administra Francisco Trigoso de Aragão Morato no termo de Torres Vedras, a Quinta Nova e Carmões com suas anexas

1825

Francisco Manuel Trigoso de Aragão Morato

140 fls. (102 fls. + 38 fls.); paper.

ANTT, Família Saldanha e Castro e Falcão Trigoso, Liv. 1 dos índices (provisional accession nr).

PT/TT/ FSACR/LIV1/02

Archival history:

This index was produced in 1825. It passed, with other documents and properties of the family, to Emília Augusta Trigoso de Oliveira Pereira Homem de Magalhães, niece of Francisco Trigoso. The transmission continued from generation to generation until 2007, when it was deposited under contract at the National Archives of Torre do Tombo.

Documentary context and description

This is the second index of a set of three, grouped in a codex organized and written by Francisco Trigoso (1777-1838) in Loures between 1825 and 1826. It catalogues more than 475 documents and books produced between 1252 and 1845. The documents relate to Quinta Nova and to Quinta de Carmões, located in the surroundings of Torres Vedras, and their annexes.

The index is divided into seven parts, organized by the location and type of the property, and by a typology of the documents.

The first two parts describe documents related to properties that belonged or had once belonged to Quinta Nova, while the third presents documents related to Quinta de Carmões. The fourth division summarizes documents relating to the annexes of Quinta Nova and of Quinta de Carmões. In these sections, the documents described are mostly related to the acquisition, the justification of ownership, and the management of these properties from the 16th century to the 19th. In the third part (between fls. 59 and 60), a small catalogue is included with the following title: *Catálogo geral de todos os documentos pertencentes à Quinta de Carmões em Torres Vedras e suas anexas os bens da Lourinha. Torres Vedras. Quinta de Carmões*. Francisco Trigoso decided to include this manuscript, making additions and corrections, instead of copying all the abstracts into the new inventory. This small catalogue has 225 summaries of documents produced between 1546 and 1839, and is ordered chronologically by year.

The fifth part presents abstracts of documents belonging to the chapels of the House, licenses, and provisions and privileges received from the ecclesiastical hierarchy. The sixth division describes documents related to dowries, wills and inheritance partitions, together with a report made by the author about the entailed properties of Quinta Nova and Carmões. The seventh part corresponds to documentation about judicial matters.

The document summaries are quite generous, and generally indicate the full date. They are usually organized in chronological order within each part. Some notes, corrections and summaries were added after 1826 by the author, and by a second person. Among the marginal notes are keywords that facilitate the identification of locations and subjects. **FL**

Índice

by Documents pertaining to Cofre que
deuinger ou termo de Cofre de Cofre,
a saber
Quinta Nova e Quinta de Cofre
anexo

Disponível em: www.ihpa.gov.br

Organizado e atualizado por
Luzia de Almeida de Aguiar, em nome
do Instituto de 1925.

Trabalho de Iniciação Científica
de Luzia de Almeida de Aguiar, sob a orientação
de Manoel Luiz de Aguiar, em nome
do Instituto de 1925.

Catálogo Geral de
Cofres e Documentos pertencentes à Quinta
de Carmoães em Torres Vedras e suas
Anexas e Bens na Lourença.

Torres Vedras.

Quinta de Carmoães.

In

29. Índice dos documentos pertencentes à Casa que administra Francisco Trigoso de Aragão Morato na Ponte da Pedra, termo da vila da Atalaia, e suas anexas

1826

Francisco Manuel Trigoso de Aragão Morato

95 fls.; paper.

ANTT, Família Saldanha e Castro e Falcão Trigoso, Liv. 1 dos índices (provisional accession nr).

PT/TT/ FSACR/LIV1/03

Archival history

This index was produced in 1826. It passed, with other documents and properties of the family, to Emília Augusta Trigoso de Oliveira Pereira Homem de Magalhães, niece of Francisco Trigoso. The transmission continued from one generation to the next until 2007, when it was deposited under contract at the National Archives of Torre do Tombo.

Documentary context and description

This is the third index of a set of three, grouped in a codex organized and written by Francisco Trigoso (1777-1838) in Loures between 1825 and 1826. It catalogues 282 documents produced between 1569 and 1844 that pertain to the house of Ponte da Pedra and its annexes, which were administered by him.

The index is divided into two parts. The first part presents a summary of documents relating to properties of the house of Ponte da Pedra. An appendix covered properties that no longer belonged to the House, but which the author decided to organize and include in the index. The second part contains descriptions of the documents for the annexes of the said house; each of the five subheadings in this part corresponds to a specific property.

The index is organized according to thematic and chronological criteria (the summaries are chronologically ordered within each part and subpart). The abstracts are quite generous, indicating the full date of documents. There are some notes, corrections and summaries that were added later by the author and by another person; some of the small marginal notes provide keywords to facilitate the identification of locations and subjects. **FL**

Judicial

de Documentos pertenecientes á las
gas. Dominicas en Puerto de Pedro,
terras de Villa de Alcalá, e otras
antiguas.

Dividida en sus partes,

beginiendo en el conde de Sigüenza en sus límites
en la villa de Logroño, en una de ellas
de 1826.

Francisco Manuel Peigora de Aragón Notario.

30. Instruções para a Administração da minha Caza durante a minha ausência

1817

Manuel de Almeida e Vasconcelos,
first Earl of Lapa (1784-1832)

37 fls.; paper.

- Cartório. Índice dos Maços. 1 a 20; [Maços 21-40 – copy].
- Mostrador dos dois volumes do Index dos Maços.
- Descrição da Casa do Conde.

ACCL (private collection, unnumbered documents).

PT/LCSM/ ACCL/INST01

Archival history

The Lapa archives were preserved intact in the family's possession throughout the 19th century and the first half of the 20th century, though the extinction of entails and other privileged properties caused the removal of many now 'useless' documents to remote storerooms, thus hastening the collection's general decline. Many of the documents seem to have been subsequently sold or lost, and only a few remain in the possession of the present descendants of the family, together with the inventories and some other books of larger dimension and apparatus. The owner of the inventories described, a grandson of the last Earl of Lapa, has for decades continuously sought to reassemble the family archive by various means.

Documentary context and description

The *Instruções para a Administração da minha Caza durante a minha ausência* ("Instructions for managing my House during my absence") were written by the 1st Earl of Lapa in 1819, before he left for Russia as Portuguese plenipotentiary. The document cannot be considered a characteristic inventory or finding-aid, as it does not concern only, or even mainly, the House's archive. Nevertheless, it was deeply rooted in the archive's existence and proper care, which the Earl clearly considered the heart of his estates and of first importance to the family's wealth. Additionally, the document is the first of a large and heterogeneous set of "instructions", inventories, finding-aids and lists that the Earl of Lapa himself produced, or produced under his supervision, in order to organize, use, and manage his archives. It was thus included in the INVENT.ARQ project; this entry will also make brief references to other parts of the set of inventories and finding-aids in the Lapa collection.

Designed as a practical management tool – with moral overtones and advice, though – the *Instruções* volume was divided into three sections: administration, lease contracts, and the House's general situation. The

Ames Filhos

A quem se fazem com mais diligências do que a ti e com trabalho, e
o resultado de algumas fadigas e esparveria? Cêta vez fiz lembrar
as seguintes instruções, como queas a effica haem grande applica-
ção e cumprimento da Casa, que por obsequio de meus submissos
abande para a sua conservação, e augmento, e que por virtude seu-
pra se devam reger, por que a minha Fazenda Real ha hem de gran-
de bem da vida, que sem ella não posso reger a terra.

Começo que o Alvaraz permittida que regresse com brevedade
de se meu filho, e que abande pela tua educação em alguns destes
tempo para augmentar, e alterar as seguintes instruções com qua-
te obsequio a Casa abuscando te tornas com o que que de abe-
ra a instrução.

Marcos de Sá

Instruções para a
administração da minha casa

Earl described the situation of each estate, explained where the main documents concerning it could be found, described current administrative procedures, and assigned management and legal responsibilities to precise persons in his family and household.

It was only in 1825, after his return from Russia (1821) and completion of other major diplomatic appointments, that Manuel de Almeida e Vasconcelos resumed his strong relation with the family archive. He began by commissioning a general revision of the holdings, which resulted in two new major finding aids: a two-volume oversight or “table of contents” of the whole set of 40 bundles, document by document, following the numerical order of the bundles; and a finding-aid called *Mostrador* (“viewer”), organized into sections according to the documents’ legal status and functions, and among the ones related to landed properties, according to the order of the family estates. These finding-aids allowed much quicker retrieval of documents, compared to preceding volumes produced under the Earl’s father, which were organized by family lines and their estates.

Even though these new aids allowed immediate access to the documents according to practical and legal needs, however, they still retained in the background the genealogical order so esteemed by Fr. José de Almeida e Vasconcelos discussed in this volume (HENRIQUES/ ROSA), whose four volumes remained in use, albeit more for the purpose of establishing social distinction.

Finally, by 1825, the Earl also composed another major document, *Discrição da Caza do Conde* (“Description of the Count’s

household”), which offers a general account of the family estates on about ninety folios. It mentions their acquisition dates, their revenues and their juridical situation. This accounting allows a broad view over the House’s revenues; in fact, the Earl states in the “Introduction” that his intention was to make a “kind of statistic of the House”. In addition to mentioning the location of the documents, the *Discrição* dedicates some folios to a characterization of the archival holdings, laying out its major registration books and the number of bundles the archive comprised. The Earl notes carefully the missing documents, possible problems that might be caused by their absence, and ways to respond by referring to other documents or archives. **MLR, LH, LSM**

Cartorio

1. Fazer-se a revista do Cartorio, e ver-se se os
actos completos com papeis e documentos, e se os papeis
são por actos e papeis.

O Cartorio contém os alvarás, e todos os
decretos, e Mandados, e para facilitar o trabalho e as
indagações formarem-se dois Livros que são os Livros
dos Alvarás, que são os de cada um dos alvarás e importantes
os.

Na revista dos Alvarás serão os seguintes:

Um os Alvarás 2, 3, 4, 5, 6, 7, 8, 9, 10, 11,
12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28,
29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, e todos os com-
pletos, porque aquelles documentos que faltarem para
se seguir a ordem numerica em que elles se acham
remetidos em Alvarás, tem a devida declaração nos Li-
vros dos Livros dos Alvarás, que apontam os a sua
existencia em causas pendentes, ou a sua entrega
a outros por terem sido alvarados os seus.

Empezar primeiro designar agora os faltas que
achar, e a sua importancia.

No Alvará N.º 4 falta o N.º 28 que ha impo-
tante, e que julga poder-se haver da Torre de Trancos, e
falta tambem o N.º 31 e 32. Em quanto ao primeiro,
como elle ha identico a N.º 33, que temos, por isso não
requiso proquirir ha no seu descomprido, e em quanto ao
segundo, sendo o filho de um Escrivão, parou-se-me

Tabela

1.º Part.	Alvarás e Livros	Corcovado	Cap. 1.º	pag. 17
		Porto de Conas	Cap. 2.º	pag. 19
		Palacio de Campo del Anca	Cap. 3.º	pag. 23
		Ponca de	Cap. 4.º	pag. 24
		Torres	Cap. 5.º	pag. 25
2.º Part.	Alvarados	Alvarados	Cap. 1.º	pag. 27
		S. Pedro de Chel	Cap. 2.º	pag. 27
		Alfago	Cap. 3.º	pag. 27
		Mantagos	Cap. 4.º	pag. 28
		Villa de Colatlan	Cap. 5.º	pag. 28
		Torres	Cap. 6.º	pag. 31
		Corcovado	Cap. 7.º	pag. 32
		Porto	Cap. 8.º	pag. 33
		Ladero	Cap. 9.º	pag. 36
		Cruz	Cap. 10.º	pag. 41
		Castellon	Cap. 11.º	pag. 43
		Alfago Villa de Alfago	Cap. 12.º	pag. 45
3.º Part.	Alvarados	Affonso	Cap. 13.º	pag. 46
		Alvarados sobre a Casa	Cap. 14.º	pag. 47
		Demandas	Cap. 15.º	pag. 49
		Conatos	Cap. 16.º	pag. 56
		Participação de Alvarados	Cap. 17.º	pag. 57
Part. de Conas	Alvarados	Alvarados de Conas	Cap. 18.º	pag. 57
		Alvarados de Conas	Cap. 19.º	pag. 60
		Alvarados de Conas	Cap. 20.º	pag. 61
		Alvarados de Conas	Cap. 21.º	pag. 62
		Alvarados de Conas	Cap. 22.º	pag. 63

Cartorio sobre a Casa, em 1750.

Descrição da Casa do Conde

Instruções para a administração da minha casa

31. Index Geral do Cartorio do Illustrissimo e Excelentissimo Senhor Visconde de Villa Nova do Souto de El Rey

1836

Unknown author

[2], 181, [1] fls.

BNP, Reservados, Arquivo Almada Lencastre Basto, Encarnação,
pacote 40, livro 21, cx. 40.

PT/BNP/ ALB/ENC402140

Archival history

The inventory partially describes the archives of the Viscounts of Vila Nova de Souto del Rei, and resulted from a process of archival rearrangement initiated by the 4th Viscount of Vila Nova de Souto del Rei, D. António José Almada de Melo Velho e Lencastre, in 1835-36. Another index in the collection, dating from 1835, is titled “Index de todos os maços, pastas de couro e em geral o que contém o Cartorio do Viscount of Villa Nova do Souto de El Rey. Feito aos 5 dias do mês de Março de 1835”, and may be the inventory that the notary refers to in the 1836 index when he mentions the “book in which are promiscuously inventoried all titles of the archive”. The book remained in this substantial family archive until it was sold to the National Library of Portugal, in the 1970s, where it was named after the last proprietors, Almada Lencastre Basto.

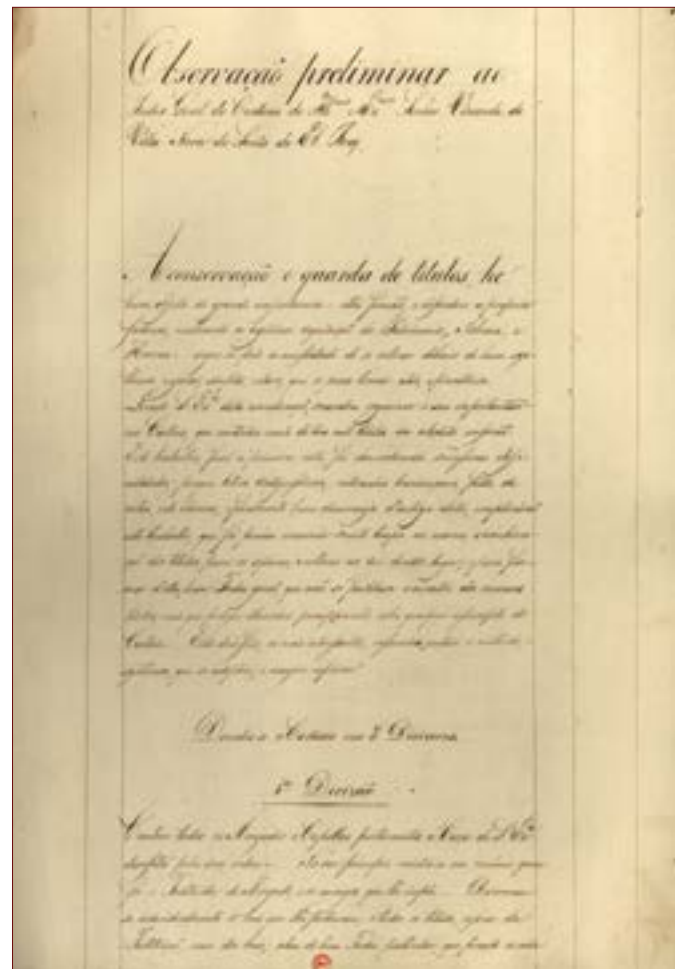
Documentary context and description

The index begins with a preliminary observation by the notary explaining the method and structure used in the archive’s arrangement, followed by some elements to facilitate the access to information: alphabetical indexes (by the name of the properties or *morgadios* (entailed estates), by subjects, and by types of documents); charts describing the entailed estates and chantries owned by the family (containing, among other information, the founder, the date of acquisition and the location of each property), together with a list of the family’s pious legacies and allodial properties.

The index contains eight major divisions, which reflect the archive’s arrangement: 1: entailed estates in alphabetic order: (Catarina Lopes, Maria Lobo, Bracaida de Melo, Brites de Melo, Luís Gonçalves de Camões, Pedro Vaz, Vasco Lourenço e Diogo Lopes e Gaspar de António de Sousa in the island of S. Tomé, etc.), chantries and pious legacies, properties and titles, allodial properties, wills and testaments, grants, and contracts; 2: favors and privileges (noble

titles as viscount; nominations to the king's council; territorial jurisdictions such as Souto del Rei, Abadim, Palmela; authorization to wear the habit of the Order of Christ and to be treated as "Dom"); 3: administrative records, contracts, payments; 4: baptismal records, weddings and death records; 5: legal papers; 6: military, ecclesiastical and civil service papers; 7: genealogical records and noble titles; and 8: varia.

The index features more than 1356 abstracts of documents, or sets of documents, spread over 62 bundles and produced between 1438 and 1830. Two abstracts were added later: an 1869 diploma, and a note saying that the farm of Gomariz was sold in 1836. We have no indication which notary was the inventory's author, but he recommended the continuation of his method, not only because he considered it traditional and useful, but also easy to understand. The custody and conservation of the indexed documents was a matter of great importance for the family: they defended the wealth and legitimated the acquisition and maintenance of heritage, nobility and honors. **AG**



32. Summario alfabetico dos documentos existentes no Cartorio da Illma. e Exma. Casa dos Senhores Condes de Palma, Obidos e Sabugal, que por ordem do Ill.mo e Ex.mo Sr. D. Manuel d' Assis Mascarenhas se fez. Principiado pelo P.e João Filippe da Cruz, redegio e concluiu José Joaquim Mattoso Gago da Camara Perito Paleografo no anno de 1836. Com hum Supplemento 1836

João Filipe da Cruz;

Joaquim Matoso Gago da Câmara

366 fl.

Available only as a digital object in the DigitArq database:

<http://digitarq.arquivos.pt/details?id=4628121>.

PT/TT/CSI/003/0001

Archival history

Written in 1836, this inventory remained in the House of Óbidos's Archive until the mid-twentieth century, when on the occasion of the death of the last earl in 1945 it passed, along with the whole archive, into the possession of the Marquis of Santa Iria, next of kin and claimant of the title of Earl of Óbidos.

It now belongs to a private collection, its current owner having bought it at auction in 2006. The Torre do Tombo National Archive has a digital copy.

Documentary context and description

The *Summario alfabetico*, which has an index at the end, contains 3,153 entries that briefly describe the documents as they existed in 1836 in the archive of the House of Óbidos, Palma and Sabugal.

It was commissioned by Manuel de Assis Mascarenhas, 5th Earl of Óbidos, Palma and Sabugal, probably on the occasion of the death of the 4th Earl of Óbidos (1806), when the house was inherited by his son, the 5th Earl, since the documentation described does not extend beyond 1807 (with only two exceptions, a deed of debt of 1808 and a receipt of 1816). As the title indicates, the contents of the *Summario* were finalized substantially later than its initial preparation by Father João Filipe da Cruz. In 1836, José Joaquim Matoso Gago da Câmara, expert palaeographer in the Torre do Tombo declared himself the author in the volume's final title.

The documents described are distributed across a typology of 123 categories, alphabetically arranged; the entries within each category are ordered chronologically. In addition to the date and typological classification, a summary of each document is presented, which

indicates the number of the packet and the document number within the packet where it is stored. The documentation described in this inventory/catalog consists mostly of loose documents (3,121) included in 81 packets. Only 15 books are referenced.

In addition to documents of a judicial or patrimonial nature, which form the majority, some personal and official documents also appear, as in most family archives. These provide essential information for understanding the genesis and evolution not only of the family but also of the archive itself. We find wills (53), inventories (8), divisions of property (25), dowries (33), contracts (22), establishment of primogeniture or chapels (17), and genealogical notes and family trees, along with some personal correspondence. **ML**

33. Índice dos títulos das Casas do Juncal, de Runa e de Alcochete

1846

Unknown author.

254 fls.; paper.

ANTT, Família Saldanha e Castro e Falcão Trigoso, Liv. 2 dos índices (provisional accession nr).

PT/TT/ FSACR/LIV2

Archival history:

This index was produced in 1846. It passed along with other documents and properties of the family to Maria Isabel de Lima Melo Baena Henriques Falcão Trigoso, the only daughter and heiress of Sebastião Francisco Falcão de Lima e Melo Baena Henriques Trigoso Pereira Homem de Magalhães. Transmission continued from each generation to the next until 2007, when it was deposited under contract at the National Archives of Torre do Tombo.

Documentary context and description

The volume was initiated at Quinta do Juncal when Sebastião Homem de Magalhães (1840-1910) was the administrator of the *morgadios* (entailed estates) of Juncal, Runa and Alcochete, probably when his grandmother Maria José de Oliveira Sande e Vasconcelos (1789-1855) was his guardian.

This inventory aimed to gather and describe all the documents related to these *morgadios*, as well as records relating to properties that were not entailed. It presents 494 summaries and some full or partial transcriptions of documents produced between 1592 and 1845. The inventory was never finalized, because documents related to the *morgadio* of Alcochete were never summarized in the space provided for them in folios 130 to 159.

The inventory begins with a description of instruments related to the *morgadio* of Juncal. This part was divided in two: summaries about acquisitions and management of the properties, followed by summaries about wills, partitions of estates (*cartas de partilhas*), dowries, and court decisions related to inheritance divisions.

A second section cataloged the written material associated with the *morgadio* of Runa. This section was also divided into two parts, as was done with Juncal's papers. The third part about Alcochete's *morgadio* was never completed. A fourth section contains summaries of material relating to properties that were not included in *morgadios*. Also divided in two, this final section also includes detailed information about some rentals during the 18th century.

The overall organization of the inventory follows thematic and typological criteria, but within each part, the document summaries are arranged chronologically. The abstracts are quite detailed, indicating the full date. A number of annotations appear in the margins with keywords to help with the documents' retrieval. **FL**

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34. Inventário dos documentos relativos aos Morgados do Santo Aleixo, de Alcochete e outros

19th century [1855-1862?]

Unknown author

237 fls.; paper.

ANTT, Família Saldanha e Castro e Falcão Trigoso, Liv. 3 dos índices
(provisional accession nr).

PT/TT/ FSACR/LIV3

Archival history

This inventory was probably produced between 1855 and 1862. It passed, with other documents and properties of the family, to Maria Isabel de Lima Melo Baena Henriques Falcão Trigoso, the only daughter and heiress of Sebastião Francisco Falcão de Lima e Melo Baena Henriques Trigoso Pereira Homem de Magalhães. Transmission continued from one generation to the next until 2007, when it was deposited under contract at the National Archives of Torre do Tombo.

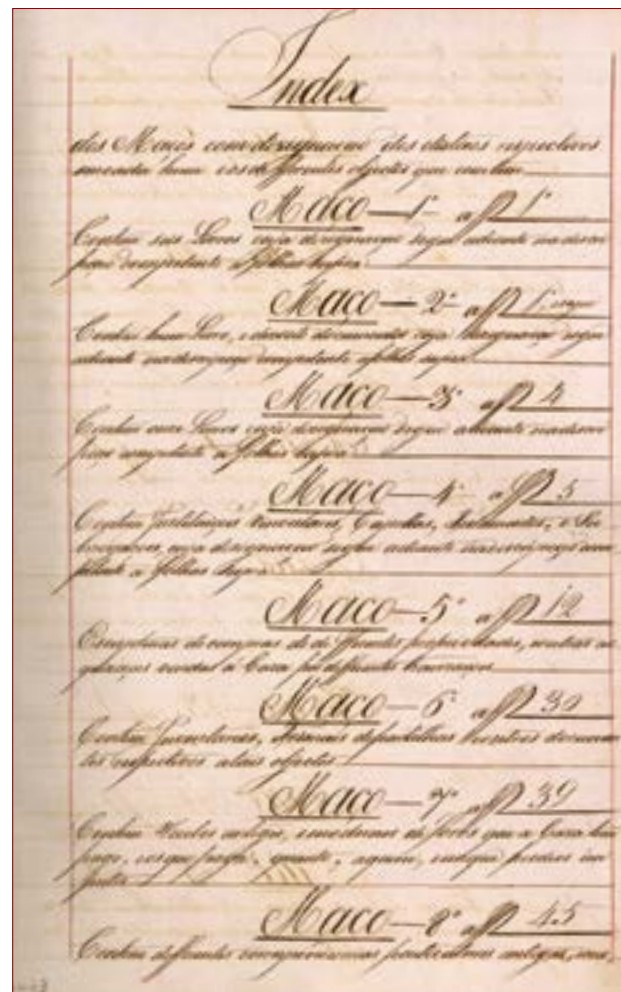
Documentary context and description

This inventory is untitled and undated. It contains more than 980 summaries of documents and books; the material ranges in date from 1445 to 1857. All the documents are related to *morgadios*, including Gataria or Santo Aleixo, Alcochete, Quinta Vale de Flores and other entailed estates or properties belonging to the family Lima e Melo Falcão Trigoso Pereira Homem de Magalhães. It was probably

prepared after the death of Maria José de Oliveira Sande Vasconcelos (1789-1855), who was the guardian and administrator of the estate of his grandson, Sebastião Homem de Magalhães (1840-1910), but before the latter reached his age of emancipation in 1862.

The inventory sequentially describes 18 packets, organized by thematic criteria and by the typology of the documents. The first four packets contained books and records relating to the institution, ownership and administration of *morgadios* and chapels belonging to the family, plus some wills and court decisions. The fifth included acquisitions, sales and other related documentation. The sixth had inventories and inheritance divisions. The seventh contained multiple receipts. The eighth consisted of private correspondence, proxies, insurance policies, certificates and documentation about inheritance and emancipation, as well as some important memoirs. The ninth grouped documentation concerning pious bequests

to chapels, including their expenses and some receipts. The tenth contained receipts and documents related to taxes. The eleventh collected documentation about acquisitions and some rentals. The twelfth had baptismal certificates, provisions, privileges, dowries, wedding certificates and material concerning the family's history. The thirteenth, fourteenth and fifteenth packets contained, respectively, documents proving the ownership of certain properties, loans, and documents related to annuities. The sixteenth, divided into two parts, had documents about debts and discharges. The seventeenth, divided into three parts, grouped records concerning different types of leases, as well as sales and other transactions of leased properties. Finally, the eighteenth contained documentation related to litigation before various courts. The summaries within each part are sometimes in chronological order; several, however, are out of order. All entries are numbered and quite detailed, indicating the date. **FL**



35. Índice do cartório das Excelentíssimas Casas de Soure

1862 (?)

Unknown author

257 p.; paper.

BPP, F.F. - M52.

PT/BP/ FF/M52

Archival history

This book was probably produced in 1862. It was preserved by the Counts of Redondo, who inherited the properties and the right to carry the title of Counts of Soure after the death of the 7th Count in 1838. Its custodial history is mostly unknown. Fausto Figueiredo (1911-1971) bought it for his collection; after his death, his wife, on behalf of the Civil Society Amaral de Figueiredo, sold his library to the Bank of Portugal in 1972.

Documentary context and description

This index describes documents related to the House of Soure. It is not dated, but was probably prepared around 1862 and commissioned by Maria Luísa da Costa (1800-1874), sister of the 7th Count of Soure, and by her husband, José Luís Gonzaga de Sousa Coutinho Castelo Branco e Meneses (1797-1863), 15th Count of Redondo. Two pencil entries from 13 and 14 July 1862, signed by F. Machado and appearing on pages 129 and 131, respectively, note that some documents were missing from the collection. The hand appears to be homogeneous

throughout the inventory, as well as in these notes, suggesting that Machado may have been its author.

The index summarizes more than 657 documents produced between 1357 and 1849, grouped in packets organized by location, type of document, the subject, or the name of the family to which they relate: Lisbon (Pkt. 1 and 2); Lafetás (Pkt. 3); Cascais (Pkt. 4); Alentejo (Pkt. 5); *morgadio* (entailed estate) on the island of S. Miguel (Pkt. 6); Monte Agudo (Pkt. 7); Coleginho (Pkt. 8); Azambujeira (Pkt. 9 and 10); court decisions (Pkt. 11); chapels (Pkt. 12); Portela, Bolonha, Aldeia Galega da Merceana, Loures (Pkt. 13); parchment originals (Pkt. 14); and certified copies on parchment (Pkt. 15). Two more entries were added to the table of contents: one about Packet 16, related to Bairro Alto, and another about Packet 17, containing various documents, but no description of the actual documents appears in the index itself. The summaries of some instruments related to Azambujeira are also missing. This suggests that the inventory was not completed.

The packets are described one by one, and the abstracts generally appear in chronological order. These summaries are very complete, usually indicating the date. **FL**

36. [Inventário do General Pestana]

1854-1864

[Daniel Ferreira Pestana]

3 books with 489 fl. (148+152+189); on paper.

ACNG, livros 1, 2, 3 (private collection, unnumbered document)

PT/CNG/ ACNG/SC 04/SSC 04.02/0001

Archival history

After its production, the inventory remained together with the related documents in the family archive and was transmitted from generation to generation to the current holder, Luís Eduardo Mendia de Castro.

Documentary context and description

Little detail is known about the inventory's production on the basis of the Castro family archive. It was compiled in the second half of the nineteenth century, between approximately 1854 and 1864, in connection with the archive's (re)organization. The author is unknown, but the initiative for reorganizing the archive and creating the inventory has been attributed to Daniel Ferreira Pestana, responsible at the time for the family's affairs.

The archive's (re)organization, and the consequent production of an inventory represented an effort to regroup and to recover family documentation, not only to preserve the memory of the family, but

also, and specially, to justify its right of possession to various properties. Notably, this project coincided with several measures to abolish entails and endowed chapels, especially the *Lei do Registo Vincular* of 1860, before the final abolition of entails in 1863.

Consisting of three books, the inventory surveys and summarizes the documentation produced and received by the family from the fourteenth century until the date of its production. The inventory corresponds closely to sixty three document folders in the archive. In most cases, access to documents was possible by using the reference number assigned (which includes the number of the folder and of the document).

The three volumes share a common running header with the following columns: record date; record number; subject mentioned (title and abstract); folder number. The summaries are brief and generally provide only the document type, the persons involved and the subject.

Although neither the entire inventory nor its individual

volumes bear any titles, the inventory does display a certain logical organization:

Book 1 – Documents about dispersed properties, proxies, and personal folders;

Book 2 – Documents about the property of Pimentéis;

Book 3 – Documents about the remaining properties in the family's possession.

Each book organizes individual records according to their type or according to the institutional realities involved, which often include a territorial component. Within these larger divisions, documents are listed in chronological order. An alphabetical index appears at the end of each volume, with entries for themes, persons and places of interest. The indexes refer to the folio number where each document is described.

Internal evidence shows that the family sought to continue the inventory until at least 1898. **PM**

Folios do livro	Titulo do que he	Folios do livro
107	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
108	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
109	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
110	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
111	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
112	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
113	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
114	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
115	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
116	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
117	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
118	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
119	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1
120	Carta de concessão de terrenos de terra firme de Siquiana, pertencentes ao d'Estado de Siquiana de Siquiana, em 18 de Maio de 1800.	1

Acknowledgments

This book was a result of a collaborative research project, one that became a great scientific and human experience in many different senses. It is now time to convey our gratitude to all the persons and institutions that made the entire project possible. First of all, we thank the authors for their willingness to write the essays, and to share with the INVENT.ARQ team their expertise on the subjects studied. The authors were present at the team's meeting in February 2015, and we had the opportunity to discuss the perspectives presented in this volume. The team members who have written the catalogue entries and their corresponding archival descriptions (found in our open access database) are also to be praised warmly. Their pioneering involvement required many hours of discussion and hard work. The project was fruitful for several advanced students as part of their Ph. D. theses, while the debates they engaged in and the issues they raised became very important for the project.

Among the institutions involved, we begin by thanking the research center that hosted the project and that helped in many ways to bring it to conclusion: the IEM - *Instituto de Estudos Medievais / Medieval Studies Institute* of the University NOVA of Lisbon. Our gratitude also extends to the additional participating institutions: CHAM - *Centro de História d'Aquém e d'Além-Mar*, IHC - *Instituto de História Contemporânea* (both at the University NOVA of Lisbon);

IICT - *Instituto de Investigação Científica Tropical*; EHEHI / CVZ - *École des hautes études hispaniques et ibériques / Casa de Velázquez*; *Équipe ITEM (EA 3002) - Université de Pau et des Pays de l'Adour*.

A word of gratitude is due to the heritage institutions that have furthered the project and this book by enabling flexible access to their collections and by facilitating reproductions of their documents: thanks are thus due to the *Biblioteca Nacional de Portugal* and to the *Direção-Geral do Livro, dos Arquivos e das Bibliotecas / Arquivo Nacional da Torre do Tombo*, who have been special partners of the project, particularly with regard to the reproduction of documents, and in collaborating on the preparation of the coming exhibition (to be held at Torre do Tombo in 2016). We wish to emphasize particularly the assistance of the respective Directors, Inês Cordeiro and Silvestre Lacerda, and the staff responsible for the digital reproductions of documents, Anabela Ribeiro and Helena Patrício. Our thanks also extend to a group of archives and libraries where the project found the warmest welcome and help, and from which we received free reproductions of documents and the permission to publish them: *Biblioteca do Banco de Portugal, Biblioteca Pública e Arquivo Regional de Ponta Delgada, Fundação da Casa de Bragança*.

Another group of indispensable and valuable partners were the owners of family archives that have graciously opened the doors of their houses, or have given permission to consult their archives

deposited elsewhere. All of them have participated in different ways in the research itself, either by being present at the team's meetings, by providing information on their documents, or even by supporting reproduction of inventories for the project. This is a special feature of our ongoing research, which we deeply value. Thanks are due to Jorge Brito e Abreu, Luís de Mendia de Castro and Teresa Mendia de Castro, Luís de Vasconcelos e Sousa, Maria João d'Orey da Camara; Vasco Maria d'Orey de Figueiredo Cabral da Câmara and brothers; Maria José Falcão Trigo da Cunha Vilas-Boas and Carlos Maria Falcão Trigo da Cunha; Matilde de Mello Gago da Silva. Particular acknowledgment is due to Luís Manuel da Costa de Sousa de Macedo for his continuing collaboration and support.

In the final preparation of this book, we had the pleasure of obtaining a Preface written by Patrick Geary, a medievalist who has always paid great attention to archival subjects, and to the ways the archives have conditioned the writing of history. Also, with his help, we have the great privilege of presenting the book publicly for the first time at a seminar on family archives taking place at the Institute for Advanced Study, Princeton, in November 2015.

To our sponsor, ATLAS SEGUROS – CONSULTORES E CORRETORES, SA., who immediately accepted a request to support the insurance of documents for the exhibition in Torre do Tombo, making it possible to bring documents from the outside, and thus

allowing several inventories described in this book to be there, we also express our gratitude.

The project and the book would have been impossible without the funding of the INVENT.ARQ project by FCT – Foundation for Science and Technology, to which we offer public recognition.

A last word should be said on our longtime collaborators in preparing books for publication, that is, Ana Pacheco and Ricardo Naito. The first embraced enthusiastically the challenge of having this book ready for launch at the IAS, working hard for weeks and managing to create a wonderful layout for our work; the second collaborated in many different ways, before and after being secretary of the IEM. In the final preparation of the book, staff at the School of Historical Studies of the Institute for Advanced Study were most helpful, namely Maria Mercedes Tuya, who gave a useful suggestion on the cover. To Vasco de Sousa Pinto from Printout, thanks are due for accepting the project on an unusually tight schedule, in order to have the book ready on time to be shipped to America.

Maria de Lurdes Rosa, Randolph C. Head

Princeton, Institute for Advanced Study; Riverside, University of California,

October 14th 2015

List of Contributors

ALICE BORGES GAGO
Instituto de Estudos Medievais
/ FCSH – Universidade NOVA de
Lisboa;
FCT Ph.D grantholder
alicegago@gmail.com

ALVARO ADOT
Casa de Velázquez / Identités,
Territoires, Expressions, Mobilités
(UPPA-ITEM EA 3002)
alvaro.adot@univ-pau.fr

ANA CANAS
Arquivo Histórico Ultramarino – IICT
ana.canas@iict.pt

ANNE GOULET
Archives départementales de la
Haute-Garonne
Identités, Territoires, Expressions,
Mobilités (UPPA-ITEM EA 3002)
anne.goulet@wanadoo.fr

FILIPA LOPES
Centro de Investigação
Transdisciplinar “Cultura, Espaço
e Memória” / U. Porto; Instituto
de Estudos Medievais / FCSH –
Universidade NOVA de Lisboa;
filipasilvalopes@gmail.com

JOSEPH MORSEL
Université Paris 1 Panthéon-
Sorbonne / LaMOP
Joseph.Morsel@univ-paris1.fr

LUÍS DA COSTA DE SOUSA DE
MACEDO
Instituto Português de Heráldica

LUÍS HENRIQUES
Instituto de História
Contemporânea / FCSH –
Universidade NOVA de Lisboa
maritimo2000@netcabo.pt

MARGARIDA LEME
Instituto de Estudos Medievais
/ FCSH – Universidade NOVA de
Lisboa
mleme48@gmail.com

MARIA JOÃO DA CÂMARA
ANDRADE E SOUSA
Centro de História d’Aquém e
d’Além-Mar / FCSH – Universidade
NOVA de Lisboa, Universidade dos
Açores
mariajoaoadacamara@gmail.com

MARIA DE LURDES ROSA
Faculdade de Ciências Sociais e
Humanas da Universidade NOVA de
Lisboa
Instituto de Estudos Medievais
/ FCSH – Universidade NOVA de
Lisboa
missi@oniduo.pt

MIGUEL METELO DE SEIXAS
Instituto de Estudos Medievais,
Centro de História de Aquém e de
Além-Mar/ FCSH – Universidade
NOVA de Lisboa, Universidade dos
Açores; U. Lusíada; FCT Post-Doc.
grantholder
miguelmeteloseixas@gmail.com

PATRÍCIA MARQUES
Instituto de Estudos Medievais
/ FCSH – Universidade NOVA de
Lisboa
patricia.marques_88@hotmail.com

PATRICK J. GEARY
Institute for Advanced Study –
Princeton
geary@ias.edu

PHILIPPE CHAREYRE
Faculté Lettres Langues Sciences
Humaines de l’Université de Pau et
des Pays de l’Adour
Identités, Territoires, Expressions,
Mobilités (UPPA-ITEM EA 3002)
philippe.chareyre@univ-pau.fr

RANDOLPH C. HEAD
College of Humanities, Arts and
Social Sciences / University of
California, Riverside
randolph.head@ucr.edu

RITA SAMPAIO DA NÓVOA
Instituto de Estudos Medievais
/ FCSH – Universidade NOVA de
Lisboa;
FCT Ph.D grantholder
ritasampnovoaa@gmail.com

VERONIQUE LAMAZOU-DUPLAN
Faculté Lettres Langues Sciences
Humaines de l’Université de Pau et
des Pays de l’Adour
Identités, Territoires, Expressions,
Mobilités (UPPA-ITEM EA 3002)
veronique.lamazou-duplan@univ-
pau.fr

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“When and why such inventories were created; how they select, organize, expand, and shape the contents of the archives that they purport to inventory; their strategies of inclusion and exclusion; the dynamic tension between the inventory as text and the documents that it references; the influence of broader cultural norms concerning other types of inventories, serial records, and collections; the conceptual and practical relationships between family archival inventories and those the crown and the Church; all of these issues and more are addressed in this pioneering volume on family archives and their inventories.”

“Maria de Lurdes Rosa and Randolph C. Head are to be congratulated for drawing together these essays that bring these broad conceptual questions to focus on aristocratic family archives from Portugal, Germany, and France between the fifteenth and nineteenth centuries. One can only hope that this brief volume will help stimulate further reflection and analysis of archival inventories as an object of historical research.”

Patrick J. Geary, Preface

