SNACSchool 3.2

Module 3:

Create and Edit

Updated June 14, 2021
Required Step: Search for your entity’s name to make sure it doesn’t already exist in SNAC.

From the SNAC Editor’s Dashboard, you can do a

- **Browse Search**
- **Standard Search**
- **Advanced Search**
SNAC Advanced Search confirms that there are “No Results Found” for activist Fannie Lou Hamer.

Check out the Searching Module for more tips and tricks.
Using the **Browse** search options lets you see entity names falling before or after your specific search criteria in the index.

You may discover duplicates or “near duplicates” to aid in editing and future records merging.
Return to the SNAC Editor’s Dashboard and click the + Create New Constellation button to start your new SNAC record.
Required step: Designate the Entity Type

Start building your new SNAC record at the Basic Information tab by designating the Entity Type: corporateBody, family, or person.

For the instructor’s example, we will designate person as the Entity Type.
Next required step:

Move to the Name Entries section where you will add Name Components following these steps:

1. Click +Add Component, and add components for:
   - Designate Surname = Hamer
   - Designate Forename and middle initial or middle name = Fannie Lou
   - Designate Date = 1917-1977

   *Note that SNAC automatically supplies punctuation for the name heading depending on the component type.

2. Set the Preference switch to Preferred

3. Assuming the Language is English and the Script is Latin, hit the magic wand buttons; otherwise, search for language and script

4. Set the Rules to “authorizedForm” and “rda”
On the **User Actions** menu on the top right of the screen, you will find the **Continue** selection.

Click **Continue** to start the **identity constellation reconciliation process**. This is one last system check to make sure your identity constellation doesn’t already exist in SNAC.
SNAC’s reconciliation check may discover duplicates or near duplicates at this step. It provides a list for you to examine for possible duplicates.

Click **View** to see the full record if you need more information, or more context. If you find that the identity constellation already exists, you also have the option to **Edit**.

When you determine there are no duplicates, click **Create New Constellation** to continue creating your new record.
After reconciliation, SNAC returns you to the Name Entries tab for more editing.

A range of User Actions appear at the top of the editing screen.

Save (“Save as you go”!)

Save & Dashboard

Send for Review

Cancel

Publish is blocked for new editors.
If variants are warranted and supported in your sources, enter them on the Name Entries tab.

1. Click **Add Component** to enter all variant name components:
   a. Surname = Townsend
   b. Forename = Fannie Lou
   c. Date = 1917-1977
   *Remember! Variant name entries must have the same date elements as the preferred name*

2. Leave the Preference switch set to Not Preferred

3. Code for Language and Script. Use the magic wand buttons to default to eng and Latn.*

4. Key Not Preferred forms as “alternativeForm” and “rda”

5. Repeat these steps for any additional, warranted variant names
   *Language and Script are from the ISO codes*

For more variant name examples, check out the Name Elements pdf on the SNAC portal.
Move to the History tab and select BiogHist:

Click the Edit icon on the right of the Biographical History entry screen and enter a biography note.

SNAC encourages you to copy and paste from outside sources like finding aids, instead of transcribing directly into the SNAC record.

Please note that you can code for paragraph breaks with <p> and </p>.

Remember to code for Language and Script.
Stay on the **History** tab to enter **Exist Dates** elements

For a single date, click **+Add New Date**

For a range of dates, click **+Add New Date Range**

**Birth/Death** for persons

**Establishment/Disestablishment** for corporate bodies

Follow the prompts to add the date information you’ve found in your sources.

**Note:** You can click “Show Fuzzy Range Fields” if you need to use them
Stay on the **History** tab to enter **Places**:

1. Click the **+Add New Place** button and use the entry screens to add geographic headings relating to the person.

2. Add a **Type** of geographic place relation. The **Type** of place indicates an associative relationship.

3. Add a **Role** for the geographic place. The role, in the context of EAC, can be **Birth**, **Death**, **Citizenship** or **Residence**.

4. Optionally, add an **Address** or a **Descriptive Note**.

*Don’t see a place name? Don’t worry! Email Jerry or Dina and they can add it.*
Move to the **Demographics** tab. You have the option to add controlled vocabulary terms for **Gender**, **Nationality**, **Languages Used**, **Occupations** and **Subjects**.
Move to the **Relations** tab and select **Resource Relations**:

1. Click the **+Add New Resource Relation** button and use the entry screens to add information for archival resources related to the person.

2. Use the **Search Resources** feature to determine whether a finding aid resource is already available in SNAC.

If finding aid resource cannot be found SNAC, either by title, URL, or other keywords, click **Create New Resource** to create a new resource.
We want to link Hamer’s SNAC record to a collection of her papers held at the Amistad Research Center at Tulane University, in New Orleans, Louisiana.

Search existing SNAC resources by URI, title or keyword to see if a description of the finding aid already exists in SNAC.

N.B.: Due to the ingest of thousands of finding aids during R & D, there’s a good chance your particular finding aid might already be in SNAC.
Resource Relations: Create Resource continued:

1. Add required elements: **Resource Type** and **Title**

2. Add information for optional elements: **Date**, **Resource Link**, **Abstract**, **Extent**, and **Languages**.

3. Search for and add the heading for the **Holding Repository**.

4. Click **Continue** to add these elements to the record.
Resource Relations Create Resource continued:

After clicking **Continue** to record the resource, a subsequent screen appears. Here you will add a value for **Role**:

- contributeOf
- creatorOf
- editorOf
- referencedIn

For this example, Fannie Lou Hamer is designated as **creatorOf**.

Add other **Resource Relations** as warranted.
On the **Relations** tab and select **Internal CPF Relations**:

1. Click the **+Add New Constellation Relation** button and use the entry screens to add information for entities related to the person.

2. SNAC prompts you to use the **Choose Relationship search** feature to locate related entities already in SNAC.

3. Select an entity from the search results by clicking the **radio button** to the left of the heading. **Note**: There is a **View** button, so you can preview the SNAC record you’re linking to.

4. When you’ve made your selection, click the **Create Relation** button at the bottom of the search results screen.
Internal CPF Relations:

1. After you Create Relation, SNAC returns you to the Internal CPF Relations screen.
2. SNAC displays the two entities separated by an arrow.
3. Use the relationship Type selector to contextualize the relationship between the two entities.
4. Fannie Lou Hamer had a great deal of correspondence with the Mississippi Freedom Democratic Party, so we apply the correspondedWith relationship type.
5. SNAC then updates the relationship description under the arrow.
6. Optionally, editors can add a Descriptive Note for more information and context for the relationship.

For a complete list of the relationship types, check Relationship Types on the SNAC Portal.
Remain on the **Relations** tab and select **External Related CPF** …

**Library of Congress Name Authority File/NACO example**

1. Click the **Add New Same-As Relation** button and use the entry screens to link to a matching entry in an external authority source.

2. Select the External Authority title (LoC/NACO) from the dropdown list.

3. Copy and paste the **URI** extension for the LoC record into the Authority ID field.

For more information about External Related CPFs, check the [Authority File List](#) and the [Authority ID Cheat Sheet](#) on the SNAC Portal.
How to get a Wikidata Link

From the Wikipedia page, select Wikidata item on left side menu

OR

Go to Wikidata.org and search for person on top right bar
Remain on the **Relations** tab and select **External Related CPF**

**Wikidata example**

1. Click the **+Add New Same-As Relation** button and use the entry screens to link to a matching entry in an external authority source.

2. Select the External Authority title (Wikidata) from the dropdown list.

3. Copy and paste the **Q number** (after the name or end of the URI) extension for the Wikidata item into the **Authority ID** field.
Create and Edit:

Corporate Body Names
Entering corporate body name elements is much the same as person names, though there is one major difference. To organize the subordinate units, SNAC entry screens contain the `SubdivisionName` element. This element can be repeated as warranted.

SNAC editors should refer to specific RDA rules governing the formation of complex corporate body names and subordinate names.

Also consult the [SNAC Editing Cheat Sheet for Corporate Bodies](#) and the [Name Elements pdf](#) for additional examples.
Under RDA, there are several criteria that you use to determine whether the name needs to be created directly or subordinately. The default is to record names in direct order unless the name itself includes a word that implies subordination, such as "department of", "office of", or "committee on"; basically a name that is so general that creating it directly would be confusing or not helpful.

Beinecke Rare Book and Manuscript Library

not Yale University. Rare Book and Manuscript Library

National Museum of the American Indian (U.S.)

not Smithsonian Institution. National Museum of the American Indian

United States. Department of Labor

not Department of Labor
Places, Subjects, and Functions elements to describe corporate bodies. Note the designation as a Holding Repository.

National Museum of the American Indian (U.S.). Archive Center

<table>
<thead>
<tr>
<th>Title</th>
<th>Relation Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrow, Inc. records, and the American Indian Tribal Court Judges Association records circa 1949-1999</td>
<td>9</td>
</tr>
<tr>
<td>Carol H. Krinsky papers 1964-2004</td>
<td>1</td>
</tr>
<tr>
<td>Donald A. Cadzow photograph collection, 1882-1919</td>
<td>1</td>
</tr>
<tr>
<td>Elayne Zorn Collection 1971-2010</td>
<td>8</td>
</tr>
<tr>
<td>Frederick Johnson photograph collection</td>
<td>1</td>
</tr>
<tr>
<td>G. Edward Montgomery papers 1951-1976</td>
<td>1</td>
</tr>
</tbody>
</table>
Holdings lists titles of archival resources (finding aids) linked to the corporate body when it’s designated as a Holding Repository.

Functions lists appropriate controlled terms to describe the work and activity of the corporate body.
Move to the Name Entries section to enter components for the corporate body name:

1. Click +Add Component, and add components for:
   - Name = (required)

2. Set the Preference switch to Preferred

3. Assuming the Language is English and the Script is Latin, hit the magic wand buttons; otherwise, search for language and script

Reference the Name Entities.pdf (page 2) for more examples.
Corporate body name elements and automatic punctuation in SNAC:

Date (optional)

JurisdictionName (optional)

Location (optional)

Name (required)

NameAddition (optional)

Number (optional)

SubdivisionName (optional)
Editors can enter elements in any order, then use the stacked “black dash” symbol, also known as a “hamburger symbol”, to drag and drop elements into the correct order.
Create and Edit:
Family Names
Name entries

Move to the Name Entries section where you will add Name Components following these steps:

1. Click +Add Component, and add components for:
   - FamilyName (required)
   - FamilyType (required)

2. Set the Preference switch to Preferred

3. Assuming the Language is English and the Script is Latin, hit the magic wand buttons; otherwise, search for language and script

4. In the Rules section, designate the form of name as authorized or alternative, and indicate the rules set as RDA
Family name elements and automatic punctuation in SNAC:

**Date** (optional)

**FamilyName** *(required)*

**FamilyType** *(required)*

**NameAddition** (optional)

**Place** (optional)

**ProminentMember** (optional)

For additional guidance on family names, link to the [Cheat Sheet for Family names](#) and the [Name Elements PDF](#).
For all constellations the things to remember are:

Name Entities
- Code for Language & Script
- Code for Rules … “rda”

Resources
- At least one resource is required
- Code the Role … creatorOf, referencedIn, etc.

Internal CPFs
- Code for Relationship type

External CPFs
- Check Wikidata, Library of Congress Authorities, VIAF, etc.

Sources
- At least one source is required
- Follow examples from SNACSchool

If you need more help and advice, check out the cheat sheets on the SNAC Portal:

SNAC Editing Cheat Sheet - Persons
SNAC Editing Cheat Sheet - Corporate Bodies
SNAC Editing Cheat Sheet - Families
Name Elements PDF
Remember to save your work as you go!
Requesting Review for your SNAC Records
Final steps … Send for Review

1. Click **Save** when all creating and editing work is done.

2. Click **Send for Review**

3. You can add a message for your reviewer if necessary.

4. Designate your assigned reviewer by starting to type the reviewer’s name “Dina H…”

5. Click **Send Review**.
Review continued ...

Your SNAC reviewer sees the review request on the Dashboard and in the Messaging Center.

**Messaging Center**

*Instructions:* Click on a message in the table to view. Messages open in the reading panel on the right.

<table>
<thead>
<tr>
<th>Inbox</th>
<th>Sent</th>
<th>Archived</th>
</tr>
</thead>
</table>

- **New Message**
- **Reply**
- **Forward**
- **Archive**

**Message View**

**Constellation for review**

**To:** Jerry Simmons (jerry.simmons@nara.gov)

**From:** Jerry Simmons (jerry.simmons@nara.gov)

**Sent:** 1/13/2020, 2:39:00 PM

Please review my constellation.

Please review my brand new record describing Flannery O'Connor. Thanks!

O'Connor, Flannery, 1925-1964
How to Edit SNAC Records
Editing SNAC records …

After review and publication, you can make edits to the record as you feel necessary.

1. Return to the SNAC Dashboard. This can be done during a current session, or after you’ve left the system and later started a new session.

2. The SNAC Dashboard organizes your most recent work: View Recently Published, In Progress Edits, and Locked Edits.

3. You can start editing work from any of these points.
Use the **Parsing** function to speed editing of person names already in SNAC ...

Click the blue **Parse** button to separate person name components. Then continue adding/adjusting the remaining elements for the name heading by coding for **Preference, Language, Script** and **Rules**.

Please note that the name parser works the same for variant name entries.

*There is no parsing feature for corporate body names or for family names.*
Editing SNAC records …

Move through the tabs and data elements, editing and updating information as warranted, and as time and resources allow. We ask editors to focus on …

- Parsing person names
- Updating headings, both preferred and non-preferred when warranted
- Adding/enhancing biography and history notes
- Adding Resource Relations to your collection … and other collections
- Adding/enhancing both Internal and External CPF relations
- Updating Source information
When editing an existing SNAC record, remember to ...

Name Entities:
- Parse person names into correct components
- Add Language & Script as warranted
- Add Rule elements as warranted
- Trash unnecessary duplicates/redundant forms from the record
- Optionally … leave foreign language/script name form as you find them

Biography:
- Add a biography if one does not already exist
- Clean up existing biography note

Exist Dates, Places:
- Trash duplicates or old information

Sources:
- Trash old, non-standard Source entries (old imported links, xml wrap entries)
- Update with new sources