

SNACSchool 4.0

Module 3:

Create and Edit





Objectives for Module 3:

- Learn how to search SNAC to support authority work
- Learn to create a new SNAC record
- Learn how to edit an existing SNAC record
- Learn how to record sources for SNAC records
- Learn how to use Cite in SNAC records
- Learn how to request review of SNAC records



Creating a New SNAC Record

Please log into SNAC-dev and follow along with your entity example.



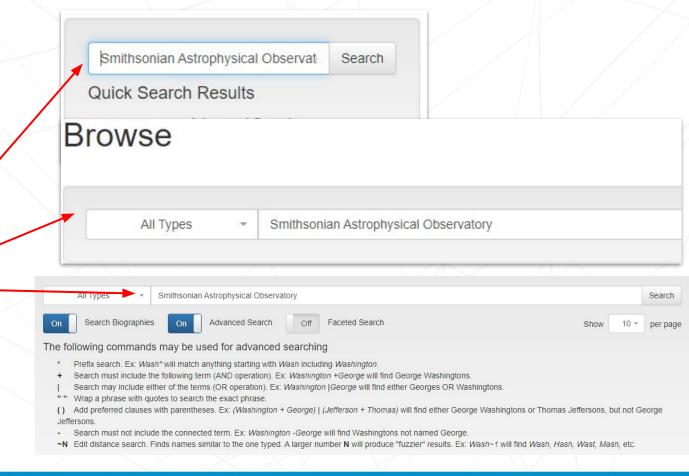
Corporate Body Names



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

- Standard Search
- Browse Search
- Advanced Search

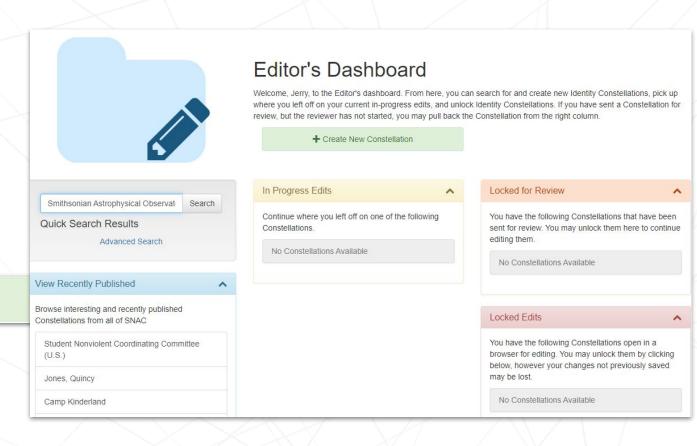




When exhaustive searching returns no results for the entity name, move to the **Editor's Dashboard** to begin your create steps.

It all starts with ...

♣ Create New Constellation

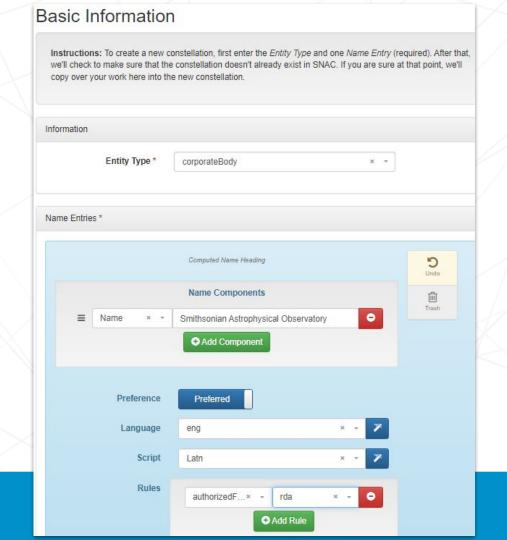




Name Entry: Basic Information

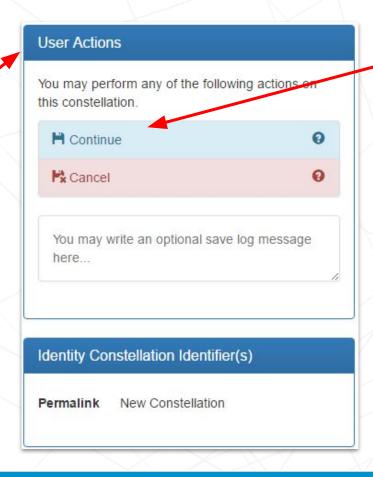
- Set the Entity Type as "corporateBody"
- 2. Enter the **Name** component (**Required**)
- 3. Set the **Preference** toggle to **Preferred**
- 4. Code the **Language** and the **Script** of the heading itself (**Use the magic wand!**)
- 5. Code **Rules** as "**authorizedForm**" and "**rda**"

See the <u>Name Elements pdf</u> (p. 3-4) for examples.





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.

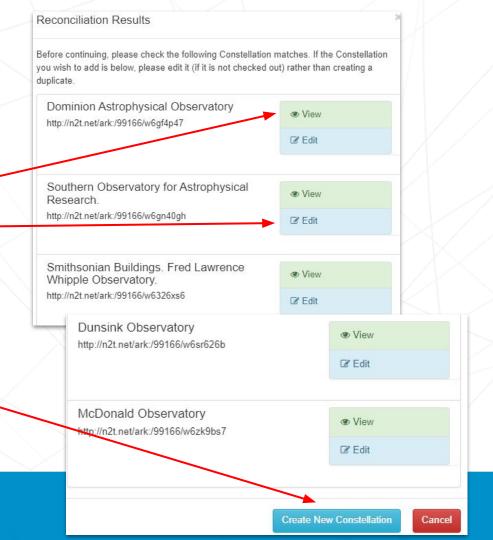


Reconciliation Results appear automatically. During this step you can:

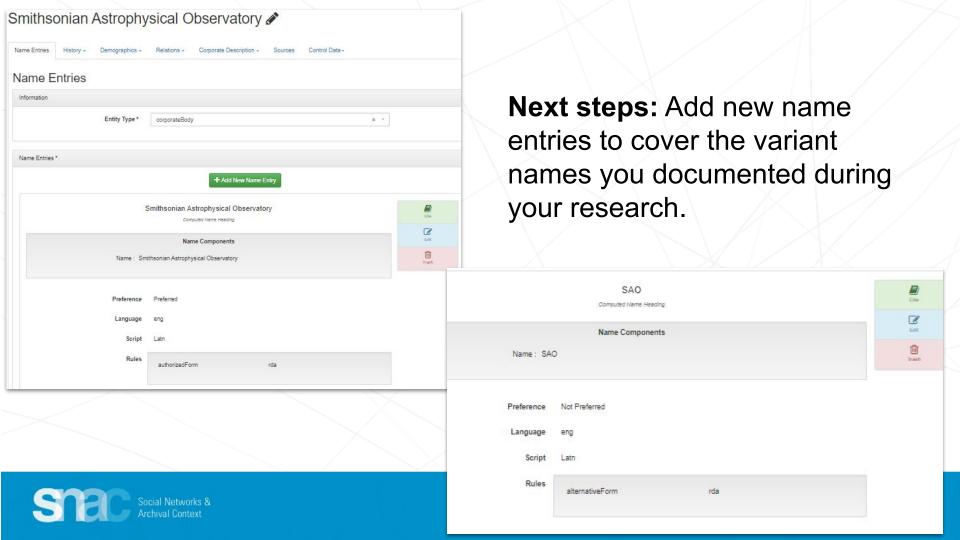
- Discover duplicates
- View specific records
- Edit records

When you're ready to move forward, click

Create New Constellation







Next steps: Add variant names you documented during your research as warranted ...

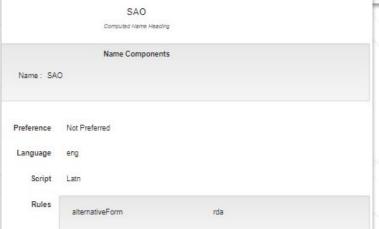
The Smithsonian Astrophysical Observatory (SAO) is part of the Center for Astrophysics

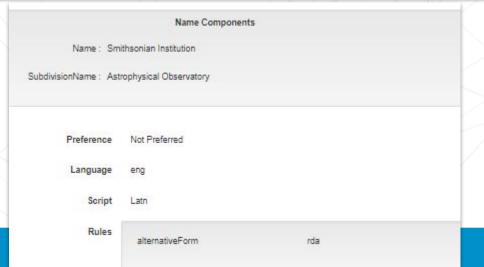
Harvard & Smithsonian. SAO was founded in 1890 under Smithsonian Secretary Samuel

Pierpont Langley as a research bureau of the Smithsonian Institution. It began its tenure

alongside other Smithsonian units on the Mall in Wash research.

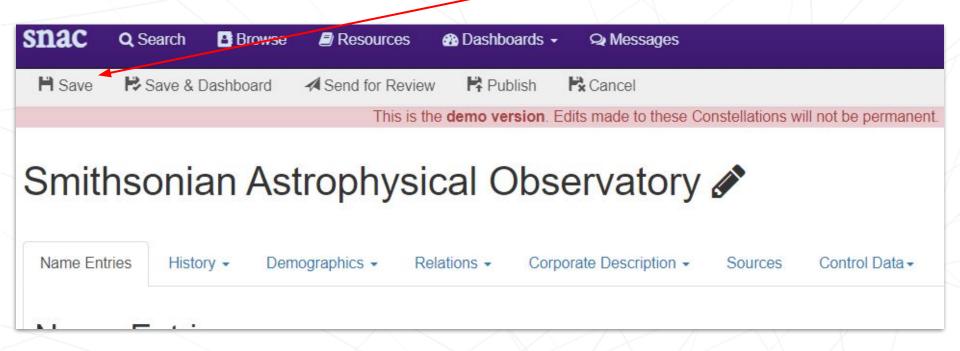
The Smithsonian Astrophysical Observatory (SAO) is part of the Center for Astrophysics |
Harvard & Smithsonian. SAO was founded in 1890 under Smithsonian Secretary Samuel
Pierpont Langley as a research bureau of the Smithsonian Institution. It began its tenure
alongside other Smithsonian units on the Mall in Washington, D.C. with an early focus on solar
***Search.



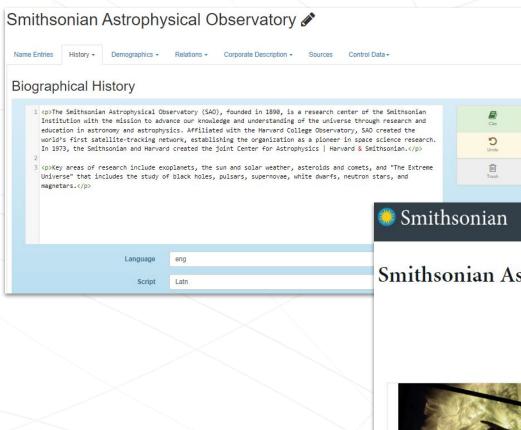




After any amount of data input, make sure to Save your work.







An organization's **About** page at its own website is a great source for the History note. The About page contains the full name of the organization, variant names, establish/founding date, founders' names, institutional affiliations, etc.

Visit What's On Explore Learn Get Involved Support About

omination in the contraction of	Smithsonian	Astrop	hysical	Observatory
---	-------------	--------	---------	-------------

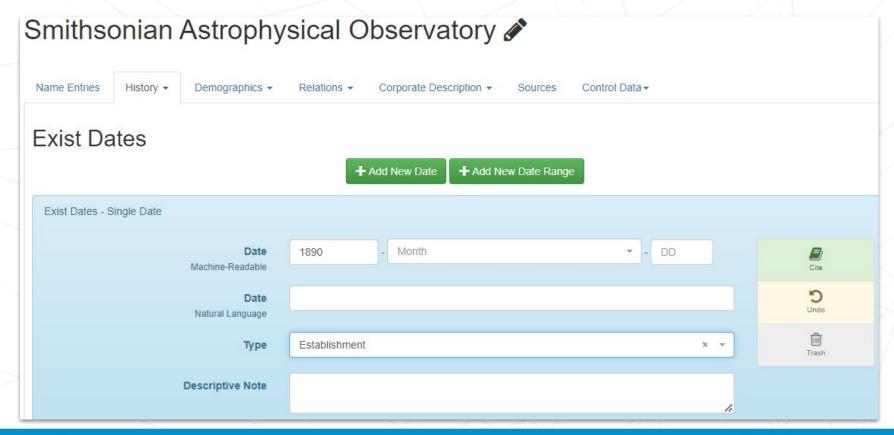


The Smithsonian Astrophysical Observatory (SAO), founded in 1890, is a research center of the Smithsonian Institution with the mission to advance our knowledge and understanding of the universe through research and education in astronomy and astrophysics. Affiliated with the Harvard College Observatory, SAO created the world's first satellite-tracking network, establishing the organization as a pioneer in space science research. In 1973, the Smithsonian and Harvard created the joint Center for Astrophysics | Harvard & Smithsonian.

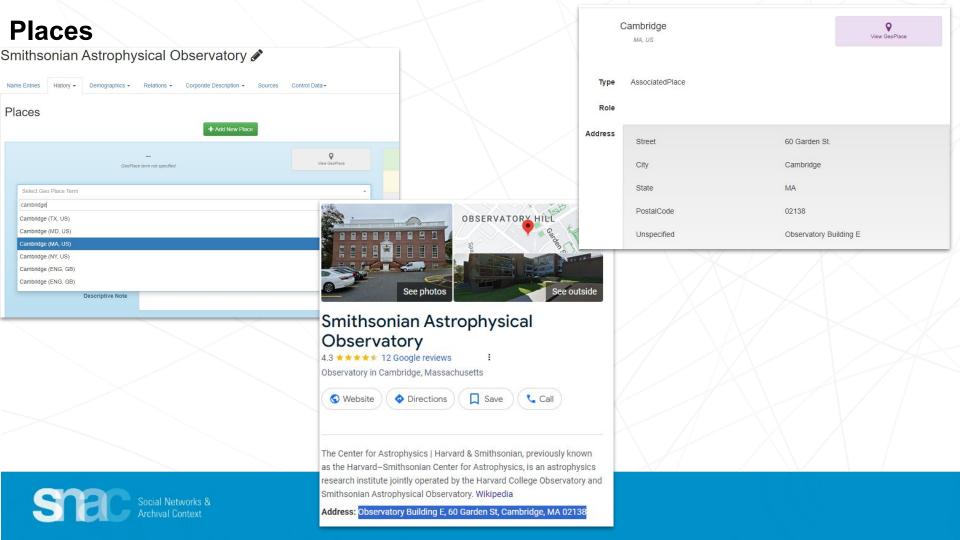
< a

Key areas of research include exoplanets, the sun and solar weather, asteroids and comets, and "The Extreme Universe" that includes the study of black holes, pulsars, supernovae, white dwarfs, neutron stars, and magnetars.

Exist Dates







Relations - Resource Relations

Step 1: Locate the finding aid or resource description



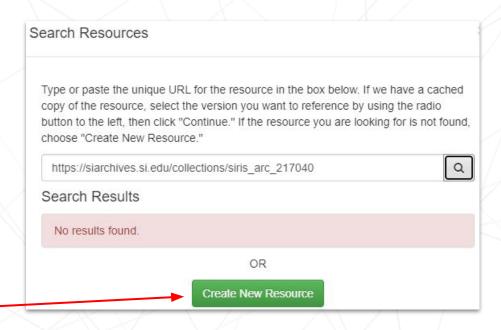
Relations - Resource Relations

Step 2: On the Relations tab, click +Add New Resource Relation

Step 3: Search the finding aid URI to see if it is already in SNAC. *You can also search the title from the finding aid in this step

Step 4: When there are no results, click **Create New Resource**

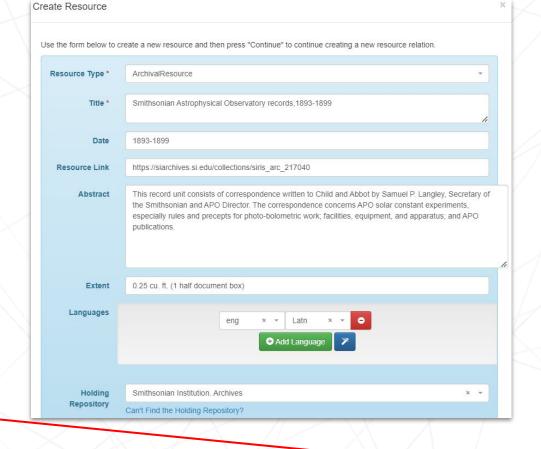






Relations - Resource Relations

- Add required elements: Resource Type and Title
- Add information for optional elements: Date(s),
 Resource Link, Abstract,
 Extent, and Languages.
- Search for and add the heading for the Holding Repository.
- 4. Click **Continue** to add these elements to the record.

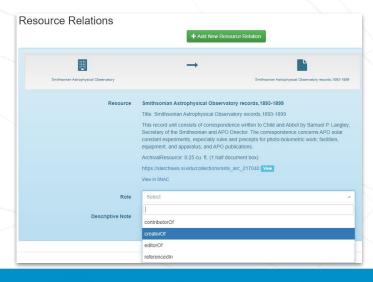




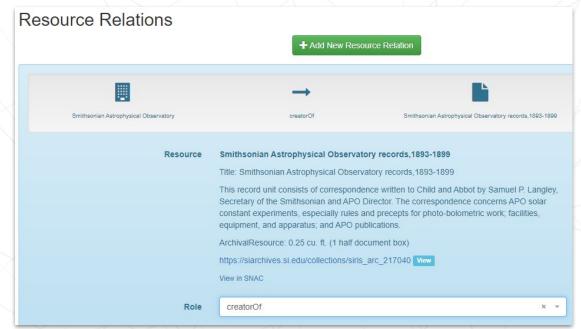


Relations - Resource Relations - Last Step

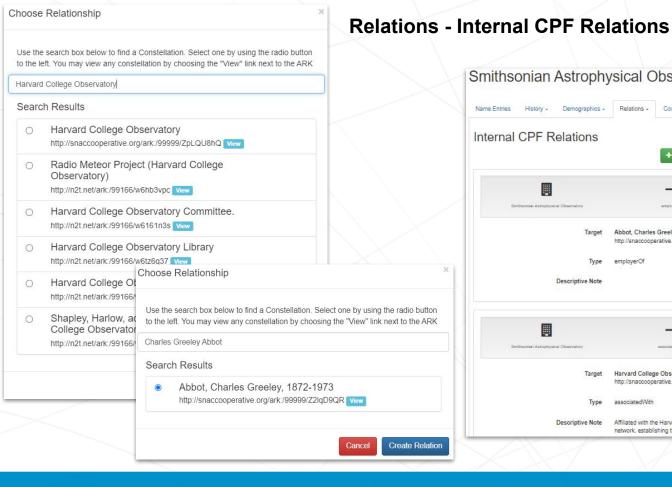
After entering and saving the Resource Relation data, SNAC moves you back to the entity description record where you enter the Role type describing the relationship between the entity and the linked archival materials.

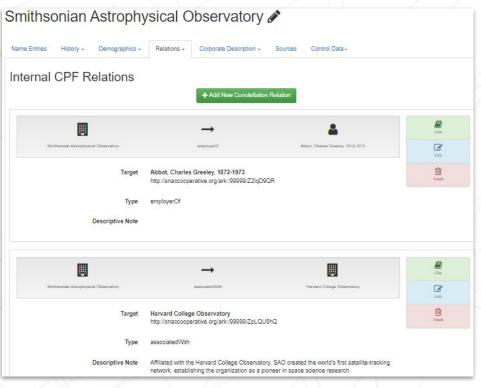


When we assign *creatorOf*, SNAC writes an explicit statement describing the specific relationship in the gray bar at the top.







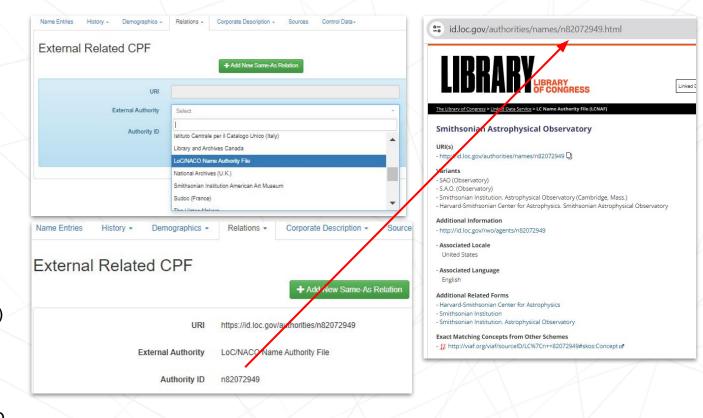




Relations - External Related CPF

Library of Congress Name Authority File/NACO example

- Click the +Add New Same-As Relation button and use the entry screens to link to a matching entry in an external authority source.
- Select the External Authority title (LoC/NACO) from the dropdown list.
- Copy and paste the URI extension for the LoC record into the Authority ID field



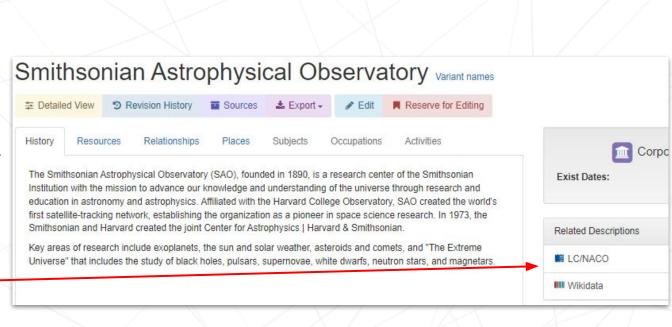
For more information about External Related CPFs, check the <u>Authority File</u> <u>List</u> and the <u>Authority ID Cheat Sheet</u> on the SNAC Portal.



Relations - External Related CPF

Once published, the new SNAC record displays a list of **Related Descriptions** on the right column. These are one-click links to authority descriptions of the entity in authority resources like SNAC.

For our demonstration, we've added **Related Descriptions** links to the **Library of Congress Name Authority File** and **Wikidata**.





Corporate Description - Activities



Like other points of entry in a SNAC record, editors can assign concept terms to further describe an entity. An element to describe corporate bodies is the area of **Activities**. This is similar to **Subject** terms, but speaks immediately to the activities or functions of an organization.

Smithsonian Astrophysical Observatory



The Smithsonian Astrophysical Observatory (SAO), founded in 1890, is a research center of the Smithsonian Institution with the mission to advance our knowledge and understanding of the universe through research and education in astronomy and astrophysics. Affiliated with the Harvard College Observatory, SAO created the world's first satellite-tracking network, establishing the organization as a pioneer in space science research. In 1973, the Smithsonian and Harvard created the joint Center for Astrophysics | Harvard & Smithsonian.

Key areas of research include exoplanets, the sun and solar weather, asteroids and comets, and "The Extreme Universe" that includes the study of black holes, pulsars, supernovae, white dwarfs, neutron stars, and magnetars.



Term Scientific research

Sources

- 1. Click +Add New Source
- Citation. Note the pattern: proper title, then date of publication, or date of web source visit.
- 3. **Found Data**; all pertinent evidence found in that source.
- URI of the source.
- 5. **Language**
- 6. Script

Found Data
The Smithsonian Astrophysical Observatory (SAO), founded in 1890, is a research center of the Smithsonian Institution with the mission to advance our knowledge and understanding of the universe through research and education in astronomy and astrophysics. Affiliated with the Harvard College Observatory, SAO created the world's first satellite-tracking network, establishing the organization as a pioneer in space science research. In 1973, the Smithsonian and Harvard created the joint Center for Astrophysics | Harvard & Smithsonian ...

URI https://www.si.edu/about/astrophysical-observatory

Language eng

Script Latn

Citation	Wikipedia, May 8, 2024
Found Data	The Smithsonian Astrophysical Observatory (SAO) is a research institute of the Smithsonian Institution, concentrating on astrophysical studies including galactic and extragalactic astronomy, cosmology, solar, earth and planetary sciences, theory and instrumentation, using observations at wavelengths from the highest energy gamma rays to the radio, along with gravitational waves. Established in Washington, D.C., in 1890, the SAO moved its headquarters in 1955 to Cambridge, Massachusetts, where its research is a collaboration with the Harvard College Observatory (HCO) and the Harvard University Department of Astronomy. In 1973, the Smithsonian and Harvard formalized the collaboration as the Center for Astrophysics Harvard & Smithsonian (CfA) under a single Director
URI	https://en.wikipedia.org/wiki/Smithsonian_Astrophysical_Observatory
Language	eng
Script	Letn

Citations in SNAC: Sources and Formats



Cite Functionality in SNAC

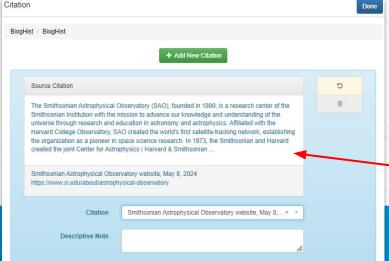


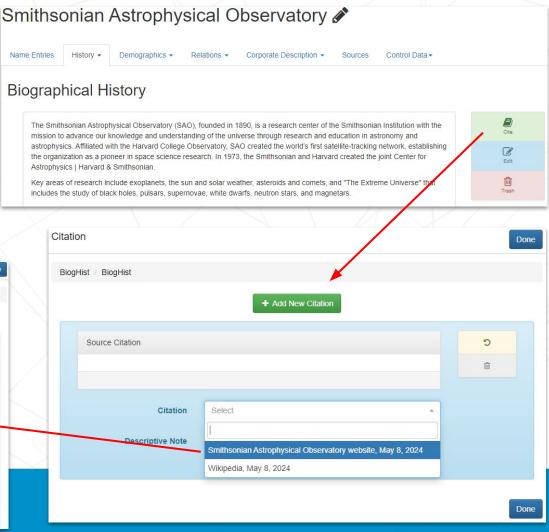
SNAC's **Cite** functionality allows editors to cite specific assertions at the element level ...

In this example show how the source citation for the **Smithsonian Astrophysical Laboratory** website is linked to the specific data element for the **History** note.

You must first enter and save **Sources** before they can appear in **Cite**.

Reminder: Cite elements are optional.





Subordinate Corporate Body Names

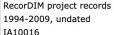


Subordinate corporate body names



MANUSCRIPT/ ARCHIVE
RecorDIM project records, 1994-2009, undated
Getty Conservation Institute. Field Projects Division.

1994-2009, undated



Getty Conservation Institute. Field Projects Division

5.58 Linear Feet (10 boxes, including 7 audiocassettes) 19.4 GB (21,614 files)

Records comprise reports, meeting materials and handouts, correspondence and memoranda, budgets, contracts, publication development and design material, images, audiocassettes, and ARIS workshop materials, dating 1994-2009 and undated, created and maintained by the Field Projects Division of the Getty Conservation Institute. The materials concern the development, operation, and results of Field Projects' Recording, Documentation, and Information Management (RecorDIM) Initiative. Some of the planning, publication, and ARIS workshop materials are in digital form, consisting of text, database, PowerPoint, image, website, and CAD files. The majority of the records were authored by project director and Field Projects Head, Francois LeBlanc, and by consultant Robin Letellier. Some of the files were also maintained by Christopher Gray, a senior project specialist in Field Projects, and Rand Eppich, project specialist and manager of the Institute's Digital Lab.



Getty Conservation Institute. Field Projects Division

*A review of the finding aid and further catalog searching reveal no variant forms of the name.

For further guidance:

SNAC Editing Cheat Sheet for Corporate Bodies

Name Elements for additional examples.



Subordinate corporate body names



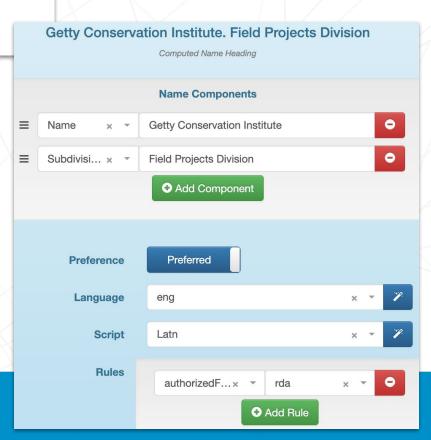
MANUSCRIPT/ ARCHIVE

RecorDIM project records, 1994-2009, undated

Getty Conservation Institute. Field Projects Division.

1994-2009, undated





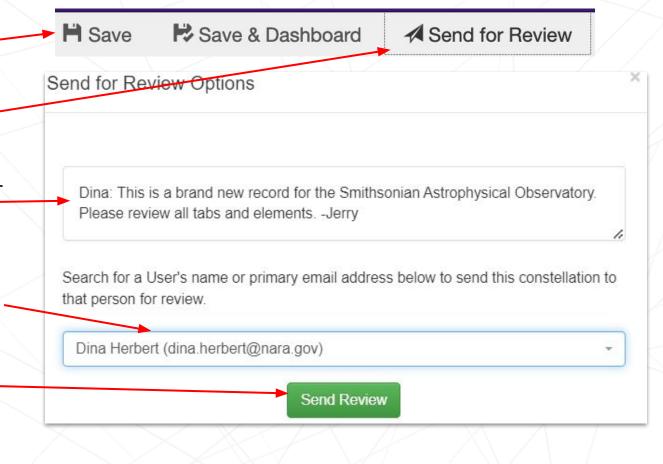


SNAC Record Review



Send for Review

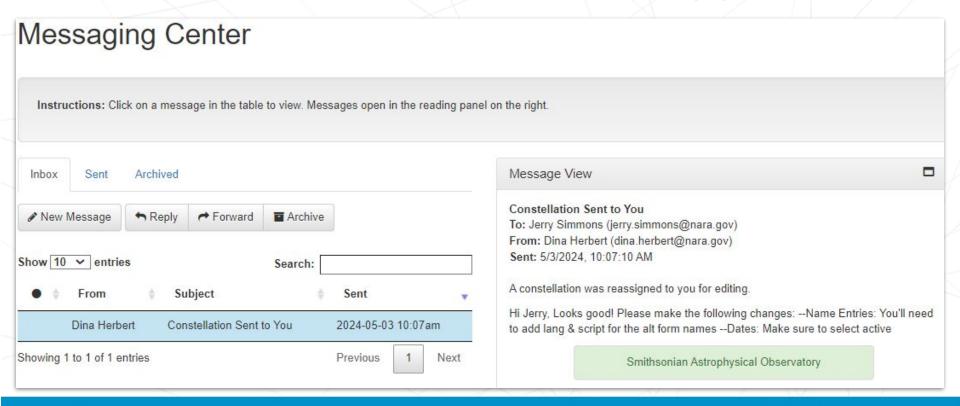
- 1. Click **Save** again when you complete your work.
- 2. Click Send for Review
- You can add a message for your reviewer if necessary.
- 4. Designate your assigned reviewer by starting to type the reviewer's name "Dina H..."
- 5. Click Send Review.





Review continued ...

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





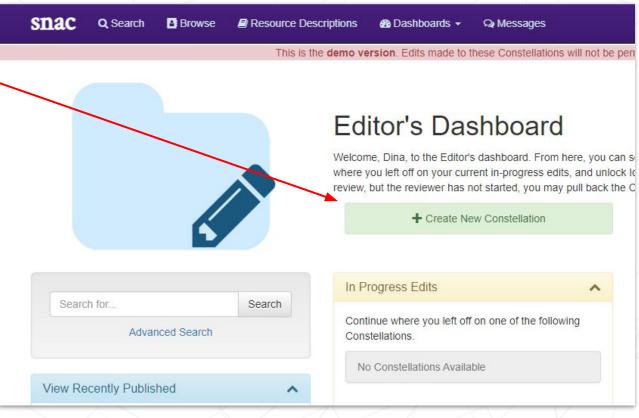
Person Names



Return to the SNAC Editor's Dashboard and click the

+ Create New Constellation button to start your new SNAC record.



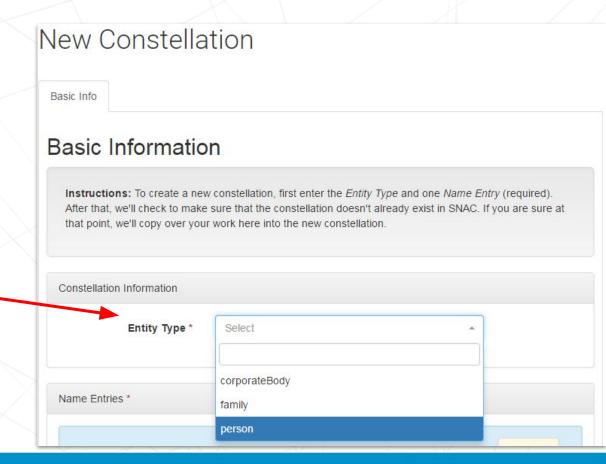




Required Element: Entity Type

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**.



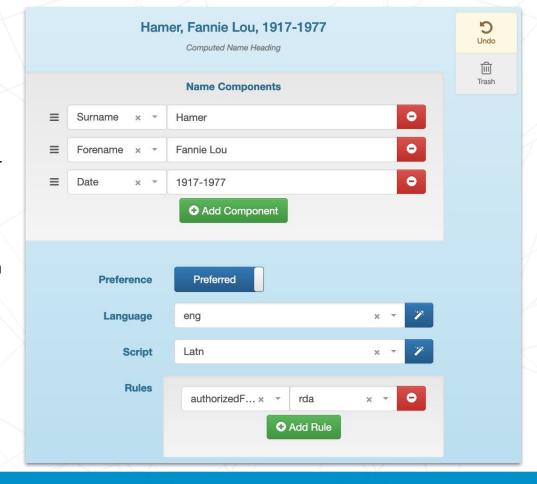


Move to the **Name Entries** section where you will add **Name Components** following these steps:

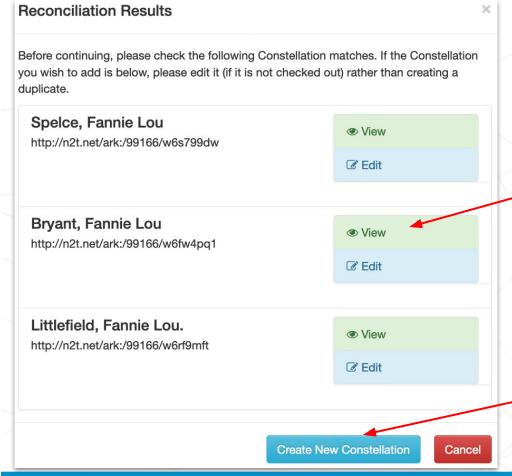
- Click +Add Component, and add components for:
 - Designate **Surname** = Hamer
 - Designate Forename and middle initial or middle name = Fannie Lou
 - Designate **Date** = 1917-1977

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

- Set the Preference switch to Preferred
- Assuming the Language is English and the Script is Latin, hit the magic wand buttons; otherwise, search for language and script
- Set the Rules to "authorizedForm" and "rda"







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.

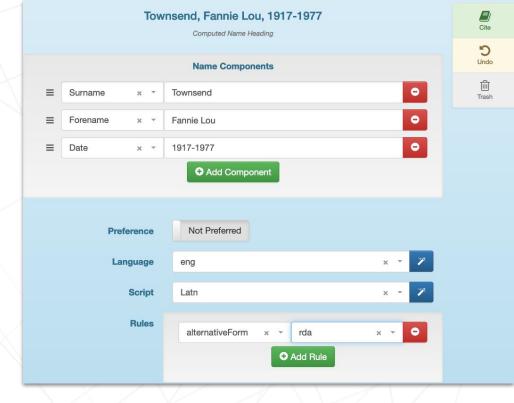


If variants are warranted and supported in your sources, enter them on the **Name Entries** tab.

- 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

- Leave the Preference switch set to Not Preferred
- 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



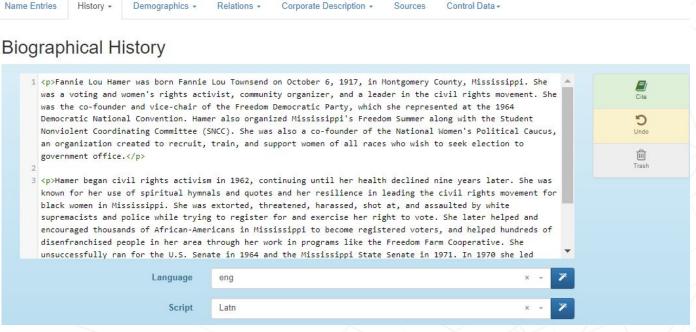
For more variant name examples: Name Elements pdf



^{*}Language and Script are from the ISO codes

History: BiogHist

Hamer, Fannie Lou, 1917-1977 🔗



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 and .

Remember to code for Language and Script.



History / Exist Dates:

For a single date, click +Add New Date

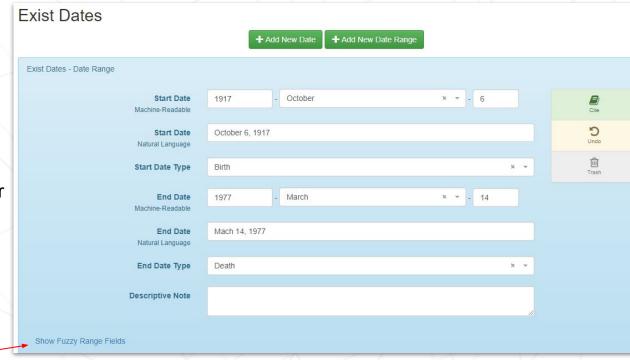
For a range of dates, click +Add New Date Range

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

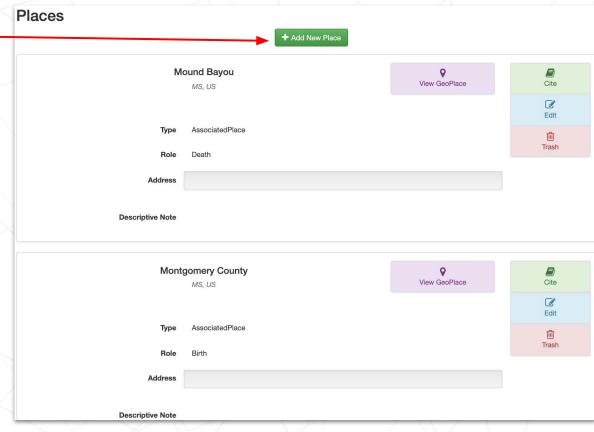




History / Places:

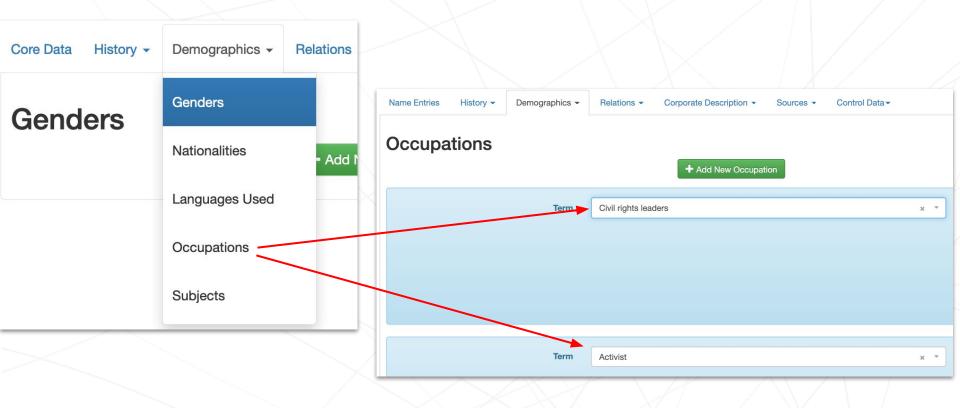
- Click the +Add New Place button and use the entry screens to add geographic headings relating to the person.
- 2. Add a **Type** of geographic place relation. The **Type** of place indicates an associative relationship.
- Add a Role for the geographic place.
 The role, in the context of EAC, can be Birth, Death, Citizenship or Residence.
- 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.





Demographics: Optional elements for Gender, Nationality, Languages Used, Occupations and **Subjects**.

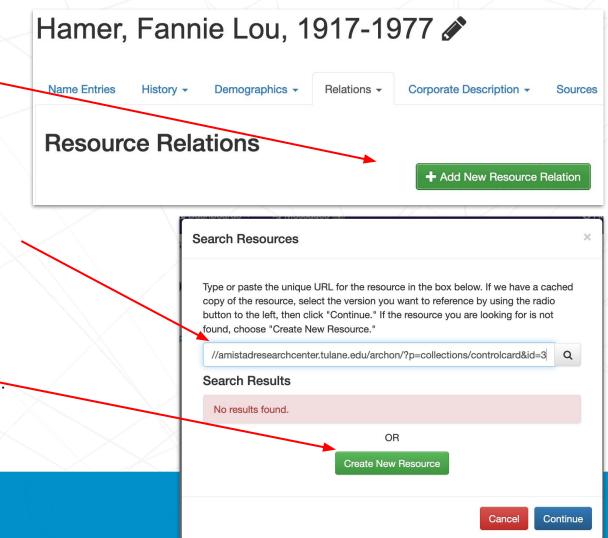




Relations / Resource Relations:

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



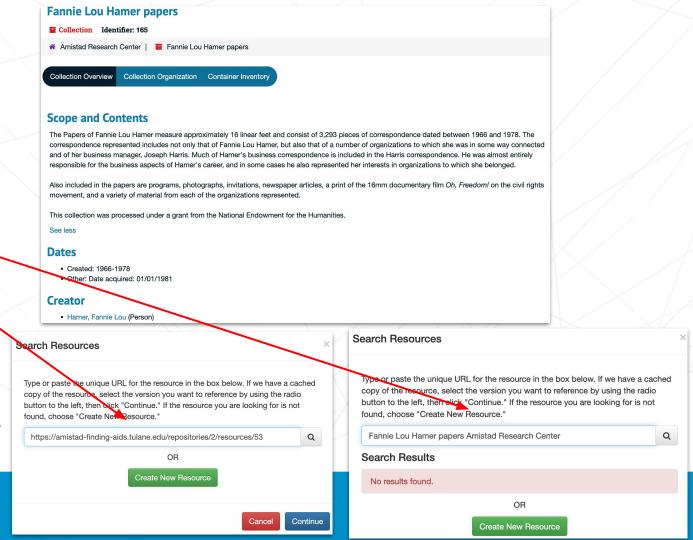


We want to link Hamer's SNAC record to a collection of her papers held at the **Amistad Research Center** at Tulane University, in New Orleans, Louisiana.

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

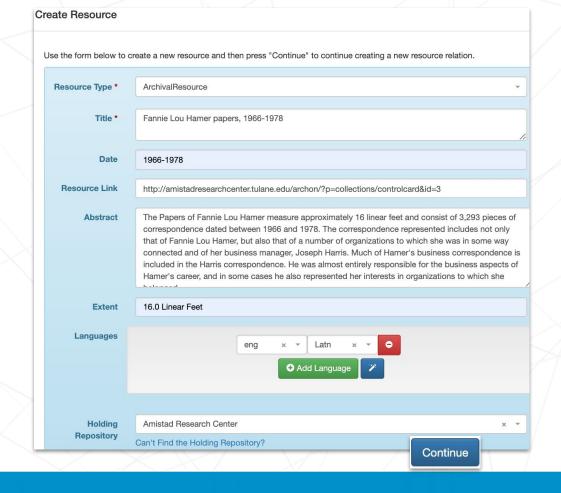
N.B.: Due to the ingest of thousands of finding aids during R & D, there's a good chance your particular finding aid might already be in SNAC.





Resource Relations continued:

- Add the Resource Type and Title elements. Required
- Add Date, Resource Link, Abstract, Extent, and Languages.
- 3. Add the **Holding Repository**.
- 4. Click **Continue** to add these elements to the record.





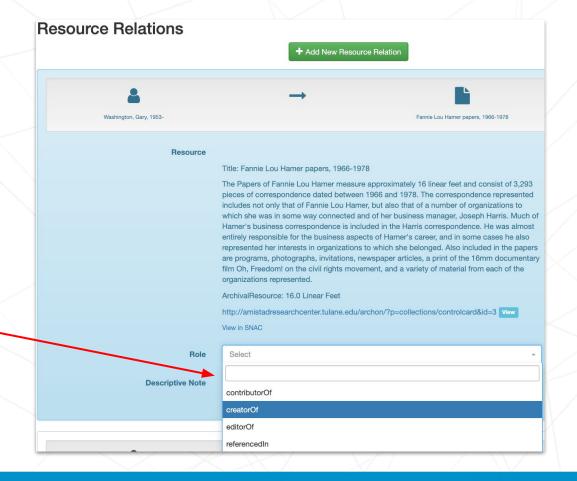
Resource Relations Create Resource continued:

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

contributorOf creatorOf editorOf referencedIn

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

Add other **Resource Relations** as warranted.

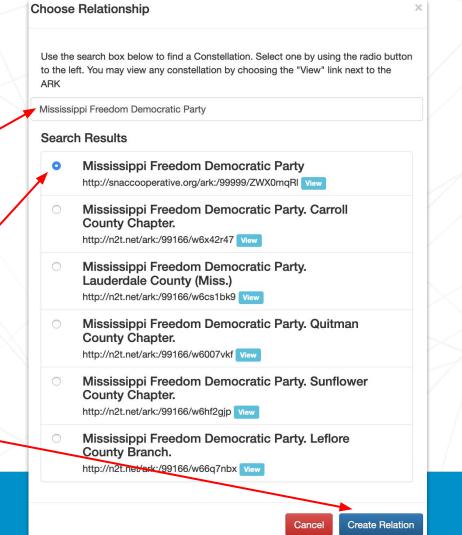




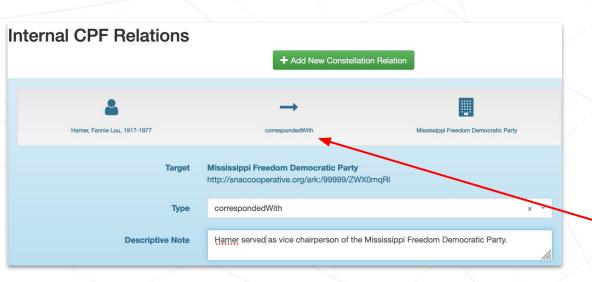
On the **Relations** tab and select **Internal CPF Relations**:

- 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.
- 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.





Relations: Internal CPF Relations



For a complete list of the relationship types, check Relationship Types on the SNAC Portal

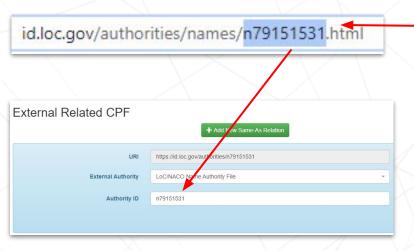
- After you Create Relation, SNAC returns you to the Internal CPF Relations screen
- SNAC displays the two entities separated by an arrow
- Use the relationship Type selector to contextualize the relationship between the two entities.
- Fannie Lou Hamer had a great deal of correspondence with the Mississippi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



Relations: 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.
- Select the External Authority title (LoC/NACO) from the dropdown list.
- Copy and paste the URI
 extension for the LoC record
 into the Authority ID field



For more information about External Related CPFs, check the <u>Authority File List</u> and the <u>Authority ID Cheat Sheet</u> on the SNAC Portal.

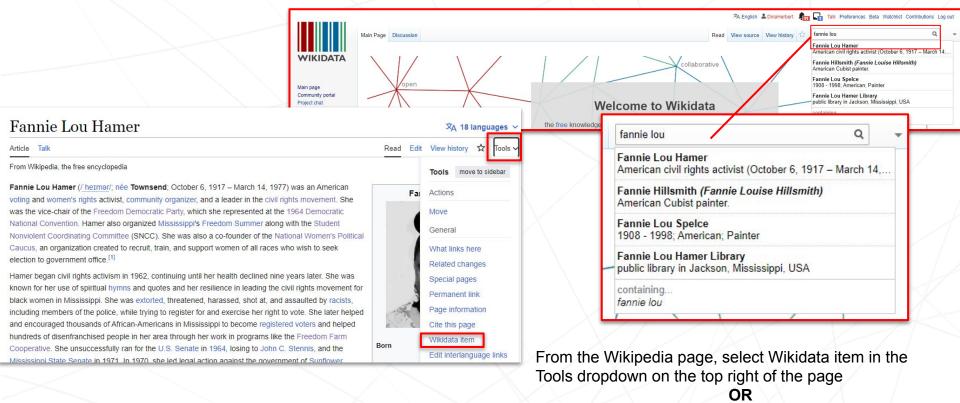


1917

- Death Date
1977



Relations: External Related CPF: Wikidata

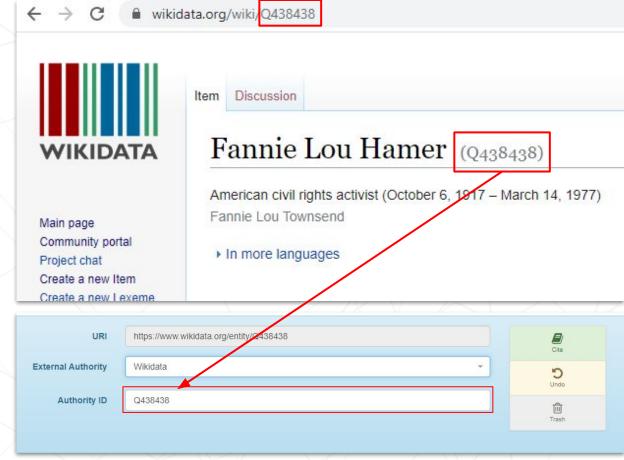


Go to Wikidata.org and search for person on top right bar



Relations: External Related CPF

- 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.
- Copy and paste the Q number (after the name or end of the URI) extension for the Wikidata item into the Authority ID field

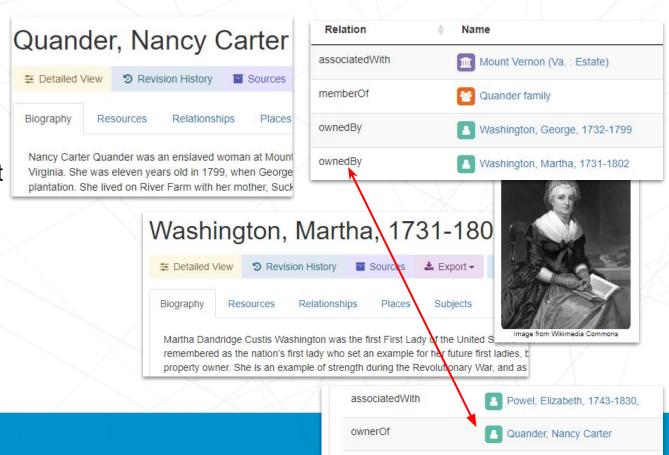




Special cases: Linking Names of the Enslaved in SNAC

Nancy Carter Quander was an enslaved woman owned by George & Martha Washington at their plantation/estate, Mount Vernon.

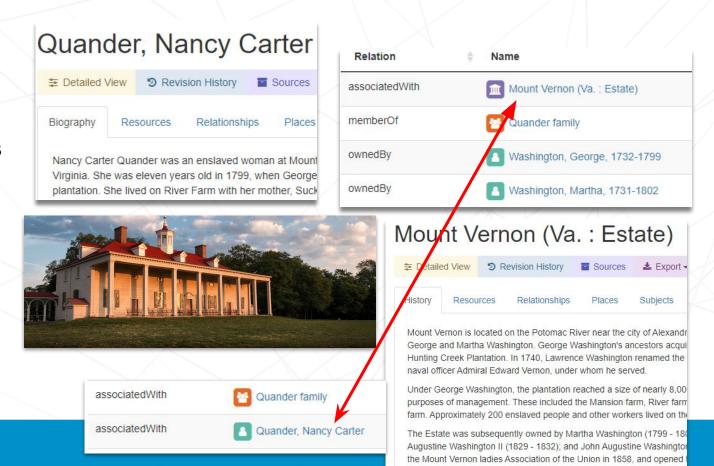
Here we can see the relationship between the enslaved person and the enslaver.





Special cases: Describing relationships for enslaved persons and plantations

This example illustrates Quander's Internal CPR Relation with Mount Vernon recorded in SNAC.



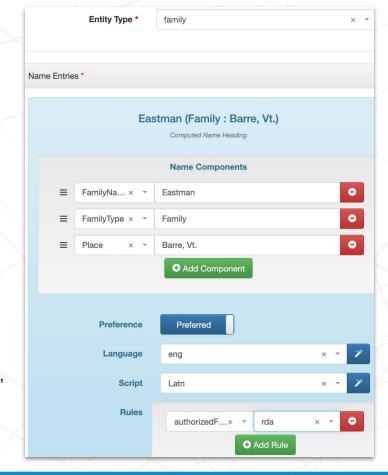


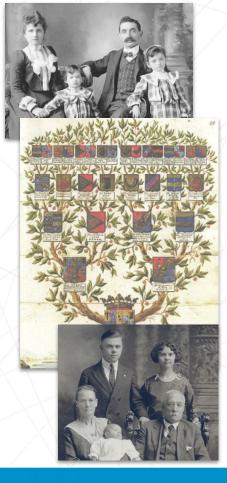
Family Names



Family name: Name entries

- 1. Set the **Entity Type** as "family"
- 2. Add components for:
 - FamilyName (required)
 - FamilyType (required)
 - Location (optional, but necessary)
- 3. Preference switch to Preferred
- 4. Code for **Language** and **Script**
- 5. Code the Rules
- 6. Continue adding **Biography**, **Places**, **Relations**, **Sources**, etc., as warranted.







Family name components:

Date (optional)

FamilyName (required)

FamilyType (required)

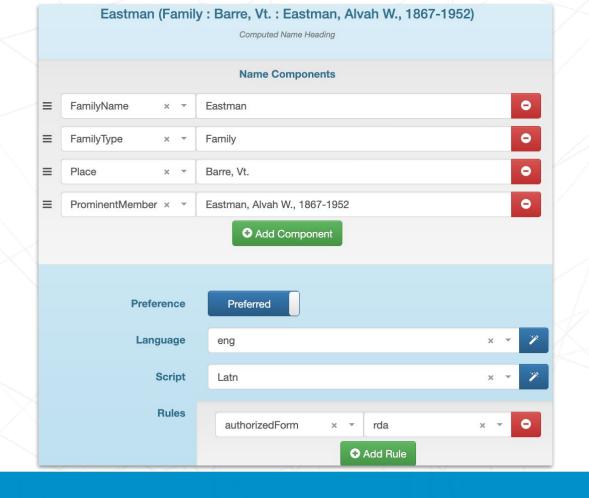
NameAddition (optional)

Place (optional)

ProminentMember (optional)

Additional family names guidance: Cheat Sheet for Family names

Name Elements PDF





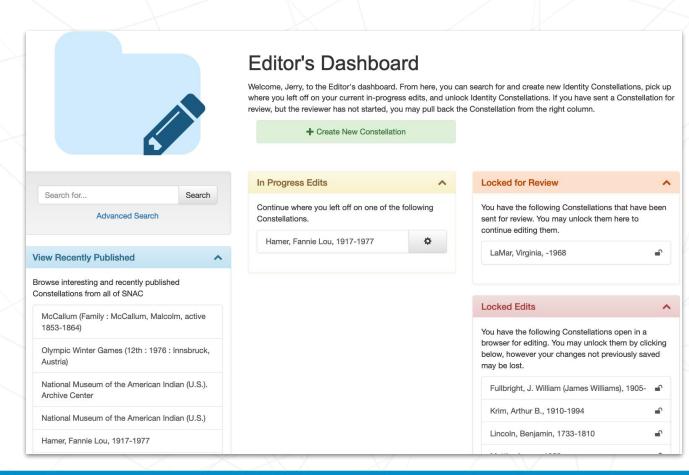
Editing SNAC Records / SNAC Dashboards



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.
- 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.



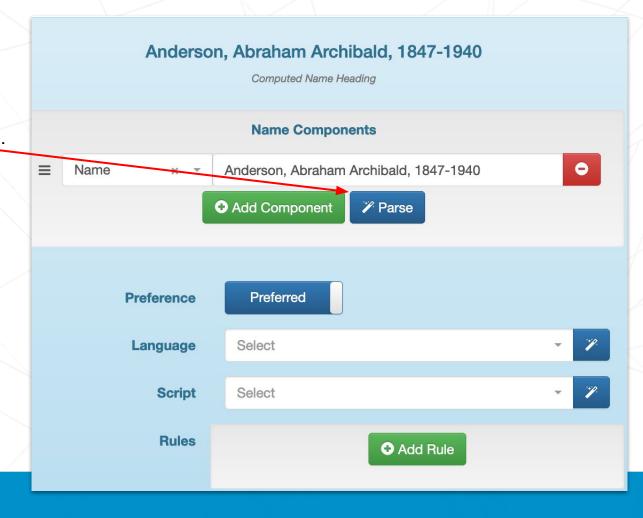


Use the **Parsing** function to speed editing of person names already in SNAC ...

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 Reminders

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, LCNAF of Congress, VIAF, Findagrave, 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!

