SNACSchool 4.0

Module 3:
Create and Edit

Updated May 2024
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 …
Name Entry: Basic Information

1. 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 [Name Elements pdf](#) (p. 3-4) for examples.
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.

On the **User Actions** menu on the top right of the screen, you will find the **Continue** selection.
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 new name entries to cover the variant names you documented during your research.
Next steps: Add **variant names** you documented during your research as warranted …
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.
Relations - Resource Relations

**Step 1:** Locate the finding aid or resource description

siarchives.si.edu/collections/siris_arc_217040

---

**Record Unit 474**

**Smithsonian Astrophysical Observatory**

**Records, 1893-1899**

**Collection Overview**

- **Repository:** Smithsonian Institution Archives, Washington, D.C. Contact us at osaref@sia.edu
- **Creator:** Smithsonian Astrophysical Observatory
- **Title:** Records
- **Dates:** 1893-1899
- **Quantity:** 0.25 cu. ft. (1 half document box)
- **Collection:** Record Unit 474
- **Language of Materials:** English
- **Summary:** This record unit consists of correspondence written to Child and Abbot by Samuel P. Langley, Secretary of the Smithsonian and APO Director. The correspondence concerns APO solar constant experiments, especially rules and precepts for photo-bolometric work; facilities, equipment, and apparatus; and APO publications.
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
1. Add required elements: **Resource Type** and **Title**

2. Add information for optional elements: **Date(s)**, **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.
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

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.
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.
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.
Sources

1. Click +Add New Source

2. 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.

4. URI of the source.

5. Language

6. Script

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

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.

* 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
1. Click **Save** again when you complete your work.

2. Click **Send for Review**

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

   Dina: This is a brand new record for the Smithsonian Astrophysical Observatory. Please review all tabs and elements. -Jerry

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.

**Message View**

**Constellation Sent to You**

To: Jerry Simmons (jerry.simmons@nara.gov)
From: Dina Herbert (dina.herbert@nara.gov)
Sent: 5/3/2024, 10:07 AM

A constellation was reassigned to you for editing.

Hi Jerry, Looks good! Please make the following changes: --Name Entries. You’ll need to add lang & script for the alt form names --Dates. Make sure to select active.

Smithsonian Astrophysical Observatory
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:

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”
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: [Name Elements pdf](#)
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.
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:

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

1. Add the **Resource Type** and **Title** elements. **Required**

2. 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**:

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.
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
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.
From the Wikipedia page, select Wikidata item in the Tools dropdown on the top right of the page

OR

Go to [Wikidata.org](https://wikidata.org) and search for person on top right bar
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.
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.
This example illustrates Quander’s Internal CPR Relation with Mount Vernon recorded in SNAC.

Special cases: Describing relationships for enslaved persons and plantations
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**

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.

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 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!