

Historic Fort Steilacoom Newsletter Index Prototype

Documentation

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Inventory

The deliverables for this project are stored in a public GitHub:

<https://github.com/mcm104/uw-capstone-fort-steilacoom>

The deliverables for this project include:

- An XML file containing index terms relating to Historic Fort Steilacoom (HFS) newsletters (index.xml)
- An XML file containing name authority terms relating to HFS newsletters (naf.xml)
- An XML file containing metadata about HFS newsletters, including added keywords from the index and name authority file (NAF) (newsletters.xml)
- An XSD file which validates the index XML file (index.xsd)
- An XSD file which validates the NAF XML (naf.xsd)
- An XSD file which validates the newsletter XML (newsletter.xsd)
- An HTML file which acts as a working prototype, demonstrating how this project could look when implemented in the HFS website (prototype.html)
- An XSLT file which generates the HTML working prototype (create_html_prototype.xsl)
- A CSS file which is used with the HTML working prototype (prototype.css)
- A JavaScript file which is used with the HTML working prototype (prototype.js)

HFS Index (XML) Overview

```

newsletterIndex terms term
1 <newsletterIndex xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
2   xsi:noNamespaceSchemaLocation="index.xsd">
3   <terms>
4     <term id="Corporations">
5       <preferredTerm>Corporations</preferredTerm>
6     </term>
7     <term id="American_Fur_Company">
8       <preferredTerm>American Fur Company</preferredTerm>
9       <parentTerm term_id="Corporations"/>
10    </term>
11    <term id="Hudsons_Bay_Company">
12      <preferredTerm>Hudson's Bay Company</preferredTerm>
13      <parentTerm term_id="Corporations"/>
14    </term>
15    <term id="North_West_Copmany">
16      <preferredTerm>North West Company</preferredTerm>
17      <parentTerm term_id="Corporations"/>
18    </term>
19    <term id="Puget_Sound_Agricultural_Company">
20      <preferredTerm>Puget Sound Agricultural Company</preferredTerm>
21      <parentTerm term_id="Corporations"/>
22    </term>
23    <term id="Union_Pacific_Railway">
24      <preferredTerm>Union Pacific Railway</preferredTerm>
25      <parentTerm term_id="Corporations"/>
26    </term>
27    <term id="Politics">
28      <preferredTerm>Politics</preferredTerm>
29      <definition>The set of activities that are associated with making decisions in groups,
30        or other forms of power relations among individuals.</definition>
31    </term>
32    <term id="Movements">
33      <preferredTerm>Movements</preferredTerm>
34      <parentTerm term_id="Politics"/>
35      <definition>A coordinated group action focused on a political, social, or religious
36        issue or ideology.</definition>
37    </term>
38    <term id="Abolitionism">
39      <preferredTerm>Abolitionism</preferredTerm>
40      <alternateTerm>Abolition</alternateTerm>
41      <alternateTerm>Abolition of slavery</alternateTerm>
42      <parentTerm term_id="Movements"/>
43      <definition>The movement to end slavery.</definition>
44    </term>

```

Screenshot captured 11 May 2022. Viewed using Oxygen XML Editor.

Index terms are shown here encoded in XML. Each term has several metadata points wrapped in <term></term> tags. All data here is validated against the XSD file “index.xsd” to ensure that it is all entered in a consistent format.

Each term can be described using the following metadata points:

| Metadata point | Attribute/element | Description | Min | Max |
|----------------|------------------------|--|-----|-----|
| Identifier | <term id="yourIdHere"> | A unique identifier for the term. Must not begin with a number, and must not contain spaces (" "). No two terms can use the same | 1 | 1 |

| | | | | |
|----------------|---|---|---|---|
| | | identifier. | | |
| Preferred term | <code><preferredTerm>Preferred Term Here</preferredTerm></code> | The preferred form of the term. | 1 | 1 |
| Alternate term | <code><alternateTerm>Alternate Term Here</alternateTerm></code> | Any alternative spelling, common misspelling, synonym, or other alternative form of this term. | 0 | ∞ |
| Parent term | <code><parentTerm term_id="parentIdHere"/></code> | For an index term that has a parent term, include the identifier for that parent term here. | 0 | 1 |
| Related term | <code><relatedTerm term_id="relatedIdHere"/></code> | For an index term that is related to another term in a significant way, include the identifier for that related term here. | 0 | ∞ |
| Scope notes | <code><scopeNotes>Your scope note here</scopeNotes></code> | If the usage of the index term may be unclear for someone who is adding keywords to a newsletter, add a scope note to clarify the term's usage. | 0 | 1 |
| Definition | <code><definition>Your definition here</definition></code> | Where necessary, add a definition for that term here. | 0 | 1 |
| Source(s) | <code><sources><source uri="sourceURLHere"/></sources></code> | If desired, links to other resources about this term (such as a Wikipedia page) can be linked here. | 0 | ∞ |

HFS Name Authority (XML) Overview

```

nameAuthorityFile agents agent alternateName
1 <nameAuthorityFile xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
2   xsi:noNamespaceSchemaLocation="naf.xsd">
3   <agents>
4     <agent id="Casey" agentType="family">
5       <preferredName>Casey</preferredName>
6       <biographicalInfo>Family of patriarch Silas Casey II</biographicalInfo>
7     </agent>
8     <agent id="Silas_Casey_II" agentType="person">
9       <preferredName>Silas Casey II</preferredName>
10      <family relatedAgent="Casey"/>
11      <dateOfBirth>
12        <year>1807</year>
13      </dateOfBirth>
14      <dateOfDeath>
15        <year>1882</year>
16      </dateOfDeath>
17      <dateOfMarriage relatedAgent="Abigail_Abby_Perry_Pearce_Casey">
18        <year>1830</year>
19      </dateOfMarriage>
20      <hasSpouse relatedAgent="Abigail_Abby_Perry_Pearce_Casey"/>
21      <demographicTerm uri="http://id.loc.gov/authorities/demographicTerms/dg2015060003"/>
22    </agent>
23    <agent id="Abigail_Abby_Perry_Pearce_Casey" agentType="person">
24      <preferredName>Abigail "Abby" Perry Pearce Casey</preferredName>
25      <alternateName>Abigail Casey</alternateName>
26      <alternateName>Abby Casey</alternateName>
27      <alternateName>Mrs. Casey</alternateName>
28      <family relatedAgent="Casey"/>
29      <dateOfMarriage relatedAgent="Silas_Casey_II">
30        <year>1830</year>
31      </dateOfMarriage>
32      <hasSpouse relatedAgent="Silas_Casey_II"/>
33      <demographicTerm uri="http://id.loc.gov/authorities/demographicTerms/dg2015060004"/>
34    </agent>
35    <agent id="Abby_Casey" agentType="person">
36      <preferredName>Abby Casey</preferredName>
37      <alternateName>Abby Casey Hunt</alternateName>
38      <alternateName>Abby Hunt</alternateName>
39      <alternateName>Mrs. Hunt</alternateName>
40      <family relatedAgent="Casey"/>
41      <dateOfMarriage relatedAgent="Lewis_Cass_Hunt">
42        <year>1860</year>
43      </dateOfMarriage>
44      <hasParent relatedAgent="Silas_Casey_II"/>

```

Screenshot captured 11 May 2022. Viewed using Oxygen XML Editor.

Name authority terms are shown here encoded in XML. Each term has several metadata points wrapped in <agent></agent> tags. All data here is validated against the XSD file “naf.xsd” to ensure that it is all entered in a consistent format.

Each agent can be described using the following metadata points:

| Metadata point | Attribute/element | Description | Min | Max |
|----------------|-------------------------|---|-----|-----|
| Identifier | <agent id="yourIdHere"> | A unique identifier for the agent. Must not begin with a number, and must not contain spaces (" "). No two agents can | 1 | 1 |

| | | | | |
|--------------------------|---|--|---|---|
| | | use the same identifier. | | |
| Agent Type | <agent agentType="agentTypeHere"> | Choose between “person”, “family”, and “corporation”. | 1 | 1 |
| Preferred name | <preferredName>Preferred Name Here</preferredName> | The preferred form of the agent’s name. This should be the fullest known form of an agent’s name (e.g. “Abigail “Abby” Perry Pearce Casey” vs. “Mrs. Casey”). | 1 | 1 |
| Alternate name | <alternateName>Alternate Name Here</alternateName> | Any alternative spelling, common misspelling, or other alternative form of this term. | 0 | ∞ |
| Biographical Information | <biographicalInfo>Agent Biography Here</biographicalInfo> | Biographical information about the agent. | 0 | 1 |
| Family | <family relatedAgent="familyIdHere" > | Only use for “person” type agents. If the person agent is a member of a family that is recorded in the name authority file, include the identifier for that family agent here. | 0 | ∞ |
| Date of Birth | See section on recording dates below. | Only use for “person” type agents. Record the date of birth of the person agent. | 0 | 1 |
| Start Date | See section on recording dates below. | Only use for “corporation” type agents. Record the start date for the corporation agent. | 0 | 1 |
| Date of Death | See section on recording dates below. | Only use for “person” type agents. Record the date of death of the person agent. | 0 | 1 |
| End Date | See section on recording dates below. | Only use for “corporation” type agents. Record the end date for the corporation agent, if the corporation no longer exists. | 0 | 1 |
| Date of Death | See section on recording dates below. | Only use for “person” type agents. Record the date of marriage of the person agent, as well as the identifier for the person agent’s spouse, if known. | 0 | 1 |
| Has Parent | <hasParent relatedAgent="parentIdHere" > | Only use for “person” type agents. Record the identifier of the person agent’s parent(s), if known. | 0 | ∞ |
| Has Spouse | <hasSpouse relatedAgent="spouseIdHere" > | Only use for “person” type agents. Record the identifier of the person agent’s spouse(s), if known. Include even if spouse is already recorded in Date of Marriage. | 0 | ∞ |
| Tribal Affiliation | <tribalAffiliation>Name of Tribe Here</tribalAffiliation> | Only use for “person” type agents who are members of an Indigenous tribe, nation, etc. Record the name of the person agent’s tribe, nation, etc. | 0 | ∞ |

| | | | | |
|------------------|---|---|---|---|
| Demographic Term | <code><demographicTerm uri="lcdgtHere"/></code> | Only use for “person” or “family” type agents. Record any demographics from Library of Congress Demographic Group Terms (LCDGT) that apply to this agent. When applied to a family agent, the term must apply to all agents within that family. More details below. | 0 | ∞ |
| Source(s) | <code><sources><source uri="sourceURLHere"/></sources></code> | If desired, links to other resources about this agent (such as a Wikipedia page) can be linked here. | 0 | ∞ |

Recording dates

Whenever recording a date, there are four different ways the date can be entered, depending on how much information is known about the agent.

Date (YYYY-MM-DD)

When a full date (year, month, and day) is known, the full date should be used. This should be entered as follows:

```
<dateOfBirth>
  <date>1890-12-29</date>
</dateOfBirth>
```

The same format should be followed for other metadata points, replacing `dateOfBirth` with

- `startDate`,
- `dateOfDeath`,
- `endDate`, or
- `dateOfMarriage`

Year-Month (YYYY-MM)

If only the year and month is known, this information should be entered as follows:

```
<dateOfBirth>
  <yearMonth>1890-12</yearMonth>
</dateOfBirth>
```

The same format should be followed for other metadata points, replacing `dateOfBirth` with

- `startDate`,
- `dateOfDeath`,
- `endDate`, or
- `dateOfMarriage`

Year (YYYY)

If only the year is known, this information should be entered as follows:

```
<dateOfBirth>
  <year>1890</year>
</dateOfBirth>
```

The same format should be followed for other metadata points, replacing dateOfBirth with

- startDate,
- dateOfDeath,
- endDate, or
- dateOfMarriage

Approximate Date

If only an approximate version of a date is known (i.e. someone was born circa 1890), this information should be entered as follows:

```
<dateOfBirth>
  <approximateDate>1890</approximateDate>
</dateOfBirth>
```

The same format should be followed for other metadata points, replacing dateOfBirth with

- startDate,
- dateOfDeath,
- endDate, or
- dateOfMarriage

Date Unknown

If the date is unknown, this can either be left out of the agent's metadata entirely, or it can be entered as follows:

```
<dateOfBirth>
  <unknown value=True/>
</dateOfBirth>
```

The same format should be followed for other metadata points, replacing dateOfBirth with

- startDate,
- dateOfDeath,
- endDate, or
- dateOfMarriage

Recording marriage dates

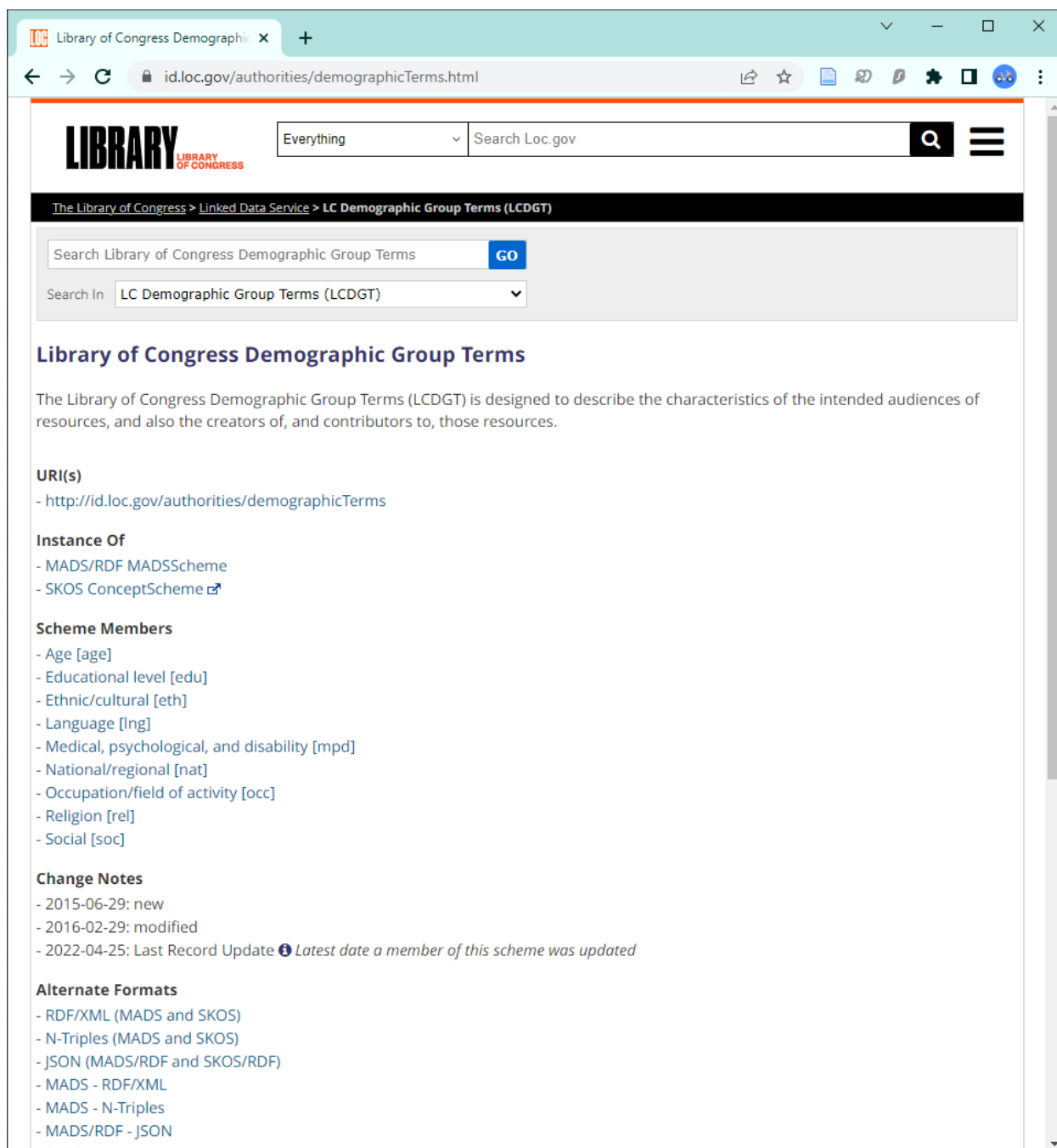
In addition to the above information regarding the recording of the date itself, if the information is known and if the agent's spouse is also in the name authority file, the identifier for that spouse should be included along with the date using the XML attribute `relatedAgent`. For example:

```
<dateOfMarriage relatedAgent="Jane_Work_Tolmie">  
  <year>1850</year>  
</dateOfMarriage>
```

This establishes that the agent married Jane Work Tolmie in 1850.

Recording demographic terms

Demographic terms should be selected from the Library of Congress Demographic Group Terms (LCDGT). These can be easily searched for using the Library of Congress's Linked Data Service: <https://id.loc.gov/authorities/demographicTerms.html>.



Library of Congress Demographic Group Terms (LCDGT)

The Library of Congress Demographic Group Terms (LCDGT) is designed to describe the characteristics of the intended audiences of resources, and also the creators of, and contributors to, those resources.

URI(s)

- <http://id.loc.gov/authorities/demographicTerms>

Instance Of

- MADS/RDF MADSScheme
- SKOS ConceptScheme

Scheme Members

- Age [age]
- Educational level [edu]
- Ethnic/cultural [eth]
- Language [lng]
- Medical, psychological, and disability [mpd]
- National/regional [nat]
- Occupation/field of activity [occ]
- Religion [rel]
- Social [soc]

Change Notes

- 2015-06-29: new
- 2016-02-29: modified
- 2022-04-25: Last Record Update **i** Latest date a member of this scheme was updated

Alternate Formats

- RDF/XML (MADS and SKOS)
- N-Triples (MADS and SKOS)
- JSON (MADS/RDF and SKOS/RDF)
- MADS - RDF/XML
- MADS - N-Triples
- MADS/RDF - JSON
- SKOS - RDF/XML

Screenshot captured 11 May 2022.

Using the “Search Library of Congress Demographic Group Terms” search bar, you can search for relevant demographic terms for various agents within the name authority file. For example, if I search for “native american”:

The screenshot shows the Library of Congress Linked Data Service search interface. The search query is "native american". The results show one result: "Indigenous people of America" with the identifier "dg2022060012". The result is categorized under "Demographic Groups" and "Cultural". The interface includes a search bar, a results list, and a sidebar with filters for "Scheme", "Type", "Collection", "Created Date", and "Modified Date".

Library of Congress

Everything Search Loc.gov

The Library of Congress > Linked Data Service

Refined by: Demographic Groups

native american GO RESET

Results: 1-1 of 1

| Label | Vocabulary | Concept | Subdivision | Identifier |
|---------------------------------|------------------------------------|-----------|-------------|--------------|
| 1. Indigenous people of America | LC Demographic Group Terms (LCDGT) | Authority | | dg2022060012 |

Aboriginal Americans ; American Indians ; Americans, Aboriginal ; Americans, Indigenous ; Americans, Native ; Amerindians ; Amérindiens ; Amerindios ; Amerinds ; First Nation people (America)

Refine your results

Scheme

Demographic Groups

Demographics - Cultural 1

Type

Authority 1 Results: 1-1 of 1

Collection

LCDGT - Cultural 1 Do you need [assistance with your search?](#)

LCDGT - General 1

Created Date

unknown 1

Modified Date

unknown 1

Screenshot captured 11 May 2022.

It should me the LCDGT preferred term: "Indigenous people of America". If I click on this:

The screenshot shows a web browser window with the address bar displaying `id.loc.gov/authorities/demographicTerms/dg2022060012.html`. The page header includes the Library of Congress logo and a search bar. The main content area is titled "Indigenous people of America" and provides a definition: "Indigenous peoples of the Americas. For particular peoples of the Americas, see the term for the particular group, e.g., [Cree (North American people); Garifuna (Caribbean people); Guaraní (South American people); Maya (Central American people).]"

Below the definition, there are several sections:

- URI(s)**: `http://id.loc.gov/authorities/demographicTerms/dg2022060012`
- Instance Of**:
 - MADS/RDF Authority
 - SKOS Concept
- Scheme Membership(s)**:
 - Library of Congress Demographic Group Terms
 - LCDGT - Ethnic or Cultural
- Collection Membership(s)**:
 - LCDGT - General Collection
 - LCDGT - Ethnic or Cultural
- Variants**:
 - Aboriginal Americans
 - American Indians
 - Americans, Aboriginal
 - Americans, Indigenous
 - Americans, Native
 - Amerindians
 - Amérindiens
 - Amerindios
 - Amerinds
 - First Nation people (America)
 - First Nation persons (America)
 - First Nations (America)
 - Indians (America)
 - Indians, American
 - Indians, Native American
 - Indians of America

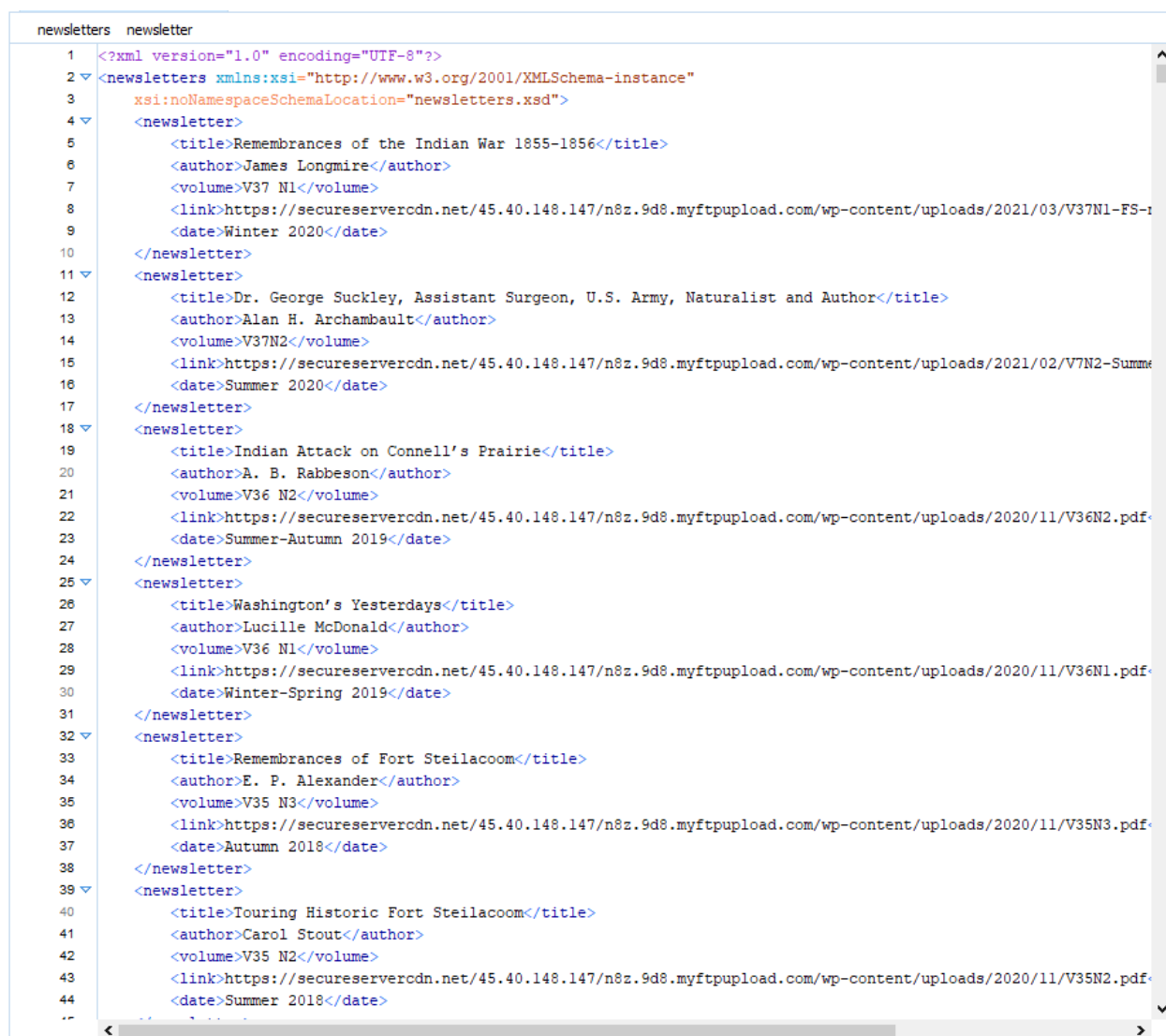
Screenshot captured 11 May 2022.

Under the section “URI(s)”, we can see the official URI for this demographic term. This should be copied and pasted into the metadata for a person or family agent as follows:

```
<demographicTerm uri="http://id.loc.gov/authorities/demographicTerms/dg2022060012"/>
```

This identifies the agent as belonging to the group “Indigenous people of America”.

HFS Newsletters (XML) Overview



Screenshot captured 11 May 2022. Viewed using Oxygen XML Editor.

Newsletters are shown here encoded in XML. Each newsletter has several metadata points wrapped in <newsletter></newsletter> tags. All data here is validated against the XSD file “newsletters.xsd” to ensure that it is all entered in a consistent format.

Each newsletter can be described using the following metadata points:

| Metadata point | Attribute/element | Description | Min | Max |
|----------------|--------------------------------------|----------------------------------|-----|-----|
| title | <title>Newsletter Title Here</title> | Title of the newsletter article. | 1 | 1 |

| | | | | |
|----------|---|---|---|---|
| Author | <author>Newsletter Author Here</author> | Author of the newsletter article. | 1 | 1 |
| Volume | <volume>Newsletter Volume Here</volume> | Volume number that the newsletter article appears in. | 1 | 1 |
| Link | <link>Newsletter URL Here</link> | URL of the newsletter article. | 1 | 1 |
| Date | <date>Newsletter Date Here</date> | Date the newsletter was published. | 1 | 1 |
| Keywords | <keywords><keyword>Keywords Here</keyword></keywords> | Keyword(s) that apply to the contents of this newsletter article. Match exactly match the preferred term/name of an entity from the index or the name authority file. | 0 | ∞ |

Workflow: Adding a new newsletter article

1. Open the newsletter XML file (newsletter.xml) using a text editor.
2. **Above** the top-most newsletter (signified by the opening tag <newsletter>), begin a new entry with an opening and closing tag:

```
<newsletter>
</newsletter>
```

3. Between the opening and closing newsletter tags, enter the title of this article between two title tags.

```
<newsletter>
  <title>Example Title</title>
</newsletter>
```

4. Below the title but before the newsletter closing tag, enter the author of this article between two author tags.

```
<newsletter>
  <title>Example Title</title>
  <author>Example Author</author>
</newsletter>
```

5. Below the author but before the newsletter closing tag, enter the volume number of this article between two volume tags.

```
<newsletter>
  <title>Example Title</title>
  <author>Example Author</author>
  <volume>V## N#</volume>
</newsletter>
```

6. Below the volume but before the newsletter closing tag, enter the URL for this article between two link tags.

```
<newsletter>
  <title>Example Title</title>
  <author>Example Author</author>
  <volume>V## N#</volume>
  <link>examplelink.com</link>
</newsletter>
```


7. Below the URL but before the newsletter closing tag, enter the date for this article between two date tags.

```
<newsletter>
  <title>Example Title</title>
  <author>Example Author</author>
  <volume>V## N#</volume>
  <link>examplelink.com</link>
  <date>Spring 2022</date>
</newsletter>
```

8. (Optional: Adding keywords) Below the date but before the newsletter closing tag, enter the opening and closing tags <keywords> </keywords>

```
<newsletter>
  <title>Example Title</title>
  <author>Example Author</author>
  <volume>V## N#</volume>
  <link>examplelink.com</link>
  <date>Spring 2022</date>
  <keywords>
  </keywords>
</newsletter>
```

9. (Optional: Adding keywords) Between the opening and closing keywords tags, add an opening and closing keyword tag.

```
<newsletter>
  <title>Example Title</title>
  <author>Example Author</author>
  <volume>V## N#</volume>
  <link>examplelink.com</link>
  <date>Spring 2022</date>
  <keywords>
    <keyword></keyword>
  </keywords>
</newsletter>
```

10. (Optional: Adding keywords) Between the opening and closing keyword tags, add the exact preferred term or preferred name as it appears in the index or name authority file. Only apply the most specific keyword necessary to describe the newsletter. For example, in our index, there is the broad term "Military History" which has narrower term "Wars and Conflicts". "Wars and Conflicts" has the narrower term "American Civil War (1861-1865)". When adding a keyword to a newsletter about the American Civil War,

only “American Civil War (1861-1865)” should be included. However, these broader terms may be included if it helps to describe what the newsletter is about; for example, if the newsletter is about the American Civil War *and* war more broadly, you may include both “American Civil War (1861-1865)” and “Wars and Conflicts”.

11. Repeat steps 9 and 10 for each desired keyword.

```
<newsletter>
  <title>Early Roads in the Fort Steilacoom Area</title>
  <author>George L. Wilkinson</author>
  <volume>V10 N1</volume>
  <link>https://secureservercdn.net/45.40.148.147/n8z.9d8.myftpupload.com/wp-content/u
    ploads/2020/11/V10N1.pdf</link>
  <date>Mar-93</date>
  <keywords>
    <keyword>Roads</keyword>
    <keyword>Isaac Ingalls Stevens</keyword>
    <keyword>George McClellan</keyword>
    <keyword>Richard Arnold</keyword>
  </keywords>
</newsletter>
```

12. Save changes made to newsletter XML file.

Update prototype

1. Open prototype XSLT file using a program like Visual Studio that can run XSLT files.
2. Run an XSLT transformation on either the index, NAF, or newsletter XML file.
3. Check output HTML file to ensure it looks correct.

Workflow: Adding a new keyword

1. If the new keyword is an agent (person, family, or corporation), open the name authority XML file (naf.xml). Otherwise, open the index XML file (index.xml).
2. Scroll to the bottom of the file.

Adding a new agent

1. Below the last closing agent tag `</agent>`, start a new entry by adding an opening and closing agent tag.

```
<agent>  
</agent>
```

2. Inside of the opening `<agent>` tag, add the XML attribute `id`.

```
<agent id="">  
</agent>
```

3. Between the quotation marks, creating a unique identifier for the agent. The simplest way to do this is to use the agent's name, replacing spaces with an underscore (for example, if our agent's name is "New Agent", our identifier could be "New_Agent").

```
<agent id="New_Agent">  
</agent>
```

4. After the `id` attribute, add the XML attribute `agentType`.

```
<agent id="New_Agent" agentType="">  
</agent>
```

5. Between the quotation marks, add the agent type. If the agent is a person, use "person". If the agent is a family, use "family". If the agent is a corporation, use "corporation".

```
<agent id="New_Agent" agentType="person">  
</agent>
```

6. Between the opening and closing agent tags, add opening and closing tags for the agent's preferred name `<preferredName>` `</preferredName>`. Enter the fullest and most correct form of the agent's name between these tags.

```
<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
</agent>
```

7. (Optional) After the preferred name but **before the closing agent tag**, add opening and closing tags for an alternate name <alternateName> </alternateName>. Enter an alternate version of the agent's preferred name between these tags. Repeat for as many alternate names as desired.

```
<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
</agent>
```

8. (Optional) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for biographical information <biographicalInfo> </biographicalInfo>. Between these tags, add as much biographical information about the agent as desired.

```
<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
</agent>
```

9. (Optional; use only for persons) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for date of birth <dateOfBirth> </dateOfBirth>. See pages 7-9 for more details on recording dates.

```
<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
```

```

<alternateName>Mrs. Agent</alternateName>
<biographicalInfo>New Agent was a new agent that we decided to add to
  our name authority file.</biographicalInfo>
<dateOfBirth>
  <date>2022-05-11</date>
</dateOfBirth>
</agent>

```

10. (Optional; use only for corporations) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for start date <startDate> </startDate>. See pages 7-9 for more details on recording dates.

```

<agent id="New_Agent" agentType="corporation">
  <preferredName>New Agent</preferredName>
  <alternateName>New Agent, LLC</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <startDate>
    <date>2022-05-11</date>
  </startDate>
</agent>

```

11. (Optional; use only for persons) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for date of death <dateOfDeath> </dateOfDeath>. See pages 7-9 for more details on recording dates.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
</agent>

```

12. (Optional; use only for corporations) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for start date <startDate> </startDate>. See pages 7-9 for more details on recording dates.

```
<agent id="New_Agent" agentType="corporation">
  <preferredName>New Agent</preferredName>
  <alternateName>New Agent, LLC</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <startDate>
    <date>2022-05-11</date>
  </startDate>
  <endDate>
    <date>2022-05-11</date>
  </endDate>
</agent>
```

13. (Optional; use only for persons) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for date of marriage <dateOfMarriage> </dateOfMarriage>. See pages 7-9 for more details on recording dates and recording spouse.

```
<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
</agent>
```

14. (Optional; use only for persons) After the previous closing tag but **before the closing agent tag**, add a “self-closing tag” for parent: <parent/>. (This is just the opening and closing tag combined into one.) After the tag name “parent”, add XML attribute relatedAgent.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent=""/>
</agent>

```

15. (Optional; use only for persons) Between these quotation marks, add the identifier for the agent's parent.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>
</agent>

```

16. (Optional; use only for persons) Repeat steps 14 and 15 for any additional known parents.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>
  <hasParent relatedAgent="New_Agents_Mother"/>
</agent>

```

17. (Optional; use only for persons) After the previous closing tag but **before the closing agent tag**, add a “self-closing tag” for spouse: <hasSpouse/>. (This is just the opening and closing tag combined into one.) After the tag name “spouse”, add XML attribute relatedAgent.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>

```



```

    <hasParent relatedAgent="New_Agents_Mother"/>
    <hasSpouse relatedAgent="New_Agents_Spouse"/>
  </agent>

```

18. (Optional; use only for persons or families) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for tribal affiliation. Only include for Indigenous persons and families. Repeat if agent is affiliated with more than one tribe.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>
  <hasParent relatedAgent="New_Agents_Mother"/>
  <hasSpouse relatedAgent="New_Agents_Spouse"/>
  <tribalAffiliation>Nisqually</tribalAffiliation>
</agent>

```

19. (Optional; use only for persons or families) After the previous closing tag but **before the closing agent tag**, add a “self-closing tag” for demographic terms:
 <demographicTerm/>. (This is just the opening and closing tag combined into one.)
 After the tag name “demographicTerm”, add XML attribute uri.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>

```

```

<dateOfBirth>
  <date>2022-05-11</date>
</dateOfBirth>
<dateOfDeath>
  <date>2022-05-11</date>
</dateOfDeath>
<dateOfMarriage relatedAgent="New_Agents_Spouse">
  <date>2022-05-11</date>
</dateOfMarriage>
<hasParent relatedAgent="New_Agents_Father"/>
<hasParent relatedAgent="New_Agents_Mother"/>
<hasSpouse relatedAgent="New_Agents_Spouse"/>
<tribalAffiliation>Nisqually</tribalAffiliation>
<demographicTerm uri=""/>
</agent>

```

20. (Optional; use only for persons or families) Between the quotation marks, add the URI for a Library of Congress Demographic Group Term. See pages 9-12 for more details.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>
  <hasParent relatedAgent="New_Agents_Mother"/>
  <hasSpouse relatedAgent="New_Agents_Spouse"/>
  <tribalAffiliation>Nisqually</tribalAffiliation>
  <demographicTerm
    uri="http://id.loc.gov/authorities/demographicTerms/dg2022060012"/>
</agent>

```

21. (Optional) After the previous closing tag but **before the closing agent tag**, add opening and closing tags for sources <sources> </sources>.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>
  <hasParent relatedAgent="New_Agents_Mother"/>
  <hasSpouse relatedAgent="New_Agents_Spouse"/>
  <tribalAffiliation>Nisqually</tribalAffiliation>
  <demographicTerm
    uri="http://id.loc.gov/authorities/demographicTerms/dg2022060012"/>
  <sources>
  </sources>
</agent>

```

22. (Optional) Between the `sources` tags, add a “self-closing” source tag. (This is just the opening and closing tag combined into one.) After the tag name “source”, add XML attribute `uri`.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>

```

```

</dateOfDeath>
<dateOfMarriage relatedAgent="New_Agents_Spouse">
  <date>2022-05-11</date>
</dateOfMarriage>
<hasParent relatedAgent="New_Agents_Father"/>
<hasParent relatedAgent="New_Agents_Mother"/>
<hasSpouse relatedAgent="New_Agents_Spouse"/>
<tribalAffiliation>Nisqually</tribalAffiliation>
<demographicTerm
  uri="http://id.loc.gov/authorities/demographicTerms/dg2022060012/">
<sources>
  <source uri=""/>
</sources>
</agent>

```

23. (Optional) Between the quotation marks, add the URL for a resource about the agent.

```

<agent id="New_Agent" agentType="person">
  <preferredName>New "Nickname" MaidenName Agent</preferredName>
  <alternateName>New Agent</alternateName>
  <alternateName>Nickname Agent</alternateName>
  <alternateName>New MaidenName</alternateName>
  <alternateName>Nickname MaidenName</alternateName>
  <alternateName>Mrs. Agent</alternateName>
  <biographicalInfo>New Agent was a new agent that we decided to add to
    our name authority file.</biographicalInfo>
  <dateOfBirth>
    <date>2022-05-11</date>
  </dateOfBirth>
  <dateOfDeath>
    <date>2022-05-11</date>
  </dateOfDeath>
  <dateOfMarriage relatedAgent="New_Agents_Spouse">
    <date>2022-05-11</date>
  </dateOfMarriage>
  <hasParent relatedAgent="New_Agents_Father"/>
  <hasParent relatedAgent="New_Agents_Mother"/>
  <hasSpouse relatedAgent="New_Agents_Spouse"/>
  <tribalAffiliation>Nisqually</tribalAffiliation>
  <demographicTerm
    uri="http://id.loc.gov/authorities/demographicTerms/dg2022060012/">
  <sources>
    <source uri="https://en.wikipedia.org/wiki/New_Agent"/>
  </sources>
</agent>

```

24. (Optional) Repeat steps 22-23 for each source.

25. Save changes made to name authority XML file.

Adding a new topic

1. Below the last closing tag `</term>`, start a new entry by adding an opening and closing term tag.

```
<term>
</term>
```

2. Inside of the opening `<term>` tag, add the XML attribute `id`.

```
<term id="">
</term>
```

3. Between the quotation marks, creating a unique identifier for the topic. The simplest way to do this is to use the term's preferred label, replacing spaces with an underscore (for example, if our term is "New Topic", our identifier could be "New_Topic").

```
<term id="New_Topic">
</term>
```

4. Between the opening and closing term tags, add opening and closing tags for the term's preferred label `<preferredTerm>` `</preferredTerm>`.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
</term>
```

5. (Optional) After the preferred term but **before the closing term tag**, add opening and closing tags for an alternate term label `<alternateTerm>` `</alternateTerm>`. Enter an alternate spelling, common misspelling, synonym, or other alternate version of the term's label between these tags. Repeat for as many alternate terms as desired.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
</term>
```

6. If this term has a parent term (i.e. it is the narrower term for a broader term) (e.g. we want to add a new war beneath the "Wars and Conflicts" term), add a "self-closing" tag

for parent term: <parentTerm/>. (This is just the opening and closing tag combined into one.) After the tag name “parentTerm”, add XML attribute term_id. If this term does not have a parent term (i.e. it does not fall below any existing terms), skip steps 6 and 7.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id=""/>
</term>
```

7. Between these quotation marks, add the identifier for the term’s parent term.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
</term>
```

8. (Optional) If this term is related to an existing term (but *not* a parent-child relationship), add a “self-closing” tag for related term: <relatedTerm/>. (This is just the opening and closing tag combined into one.) After the tag name “relatedTerm”, add XML attribute term_id.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id=""/>
</term>
```

9. Between these quotation marks, add the identifier for the term’s related term. Repeat for as many related terms as desired.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id="Old_Topic"/>
  <relatedTerm term_id="Middle_Aged_Topic"/>
</term>
```

10. (Optional) After the preferred term but **before the closing term tag**, add opening and closing tags for a scope note <scopeNotes> </scopeNotes>. Enter a description of

how this term should be used. Use if usage of this term may be confusing to someone who is trying to use it as a keyword, or may be easily mixed up with a different term that should be used instead.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id="Old_Topic"/>
  <relatedTerm term_id="Middle_Aged_Topic"/>
  <scopeNotes>Only use when describing a new topic. Not to be confused
    with New Tropic.</scopeNotes>
</term>
```

11. (Optional) After the preferred term but **before the closing term tag**, add opening and closing tags for a definition <definition> </definition>. Enter a definition of this term.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id="Old_Topic"/>
  <relatedTerm term_id="Middle_Aged_Topic"/>
  <scopeNotes>Only use when describing a new topic. Not to be confused
    with New Tropic.</scopeNotes>
  <definition>A topic which is new.</definition>
</term>
```

12. (Optional) After the previous closing tag but **before the closing term tag**, add opening and closing tags for sources <sources> </sources>.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id="Old_Topic"/>
  <relatedTerm term_id="Middle_Aged_Topic"/>
  <scopeNotes>Only use when describing a new topic. Not to be confused
    with New Tropic.</scopeNotes>
  <definition>A topic which is new.</definition>
  <sources>
  <sources>
</term>
```

13. (Optional) Between the `sources` tags, add a “self-closing” source tag. (This is just the opening and closing tag combined into one.) After the tag name “source”, add XML attribute `uri`.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id="Old_Topic"/>
  <relatedTerm term_id="Middle_Aged_Topic"/>
  <scopeNotes>Only use when describing a new topic. Not to be confused
    with New Tropic.</scopeNotes>
  <definition>A topic which is new.</definition>
  <sources>
    <source uri=""/>
  </sources>
</term>
```

14. (Optional) Between the quotation marks, add the URL for a resource about the term.

```
<term id="New_Topic">
  <preferredTerm>New Topic</preferredTerm>
  <alternateTerm>Noo Topic</alternateTerm>
  <parentTerm term_id="Kinds_of_Topics"/>
  <relatedTerm term_id="Old_Topic"/>
  <relatedTerm term_id="Middle_Aged_Topic"/>
  <scopeNotes>Only use when describing a new topic. Not to be confused
    with New Tropic.</scopeNotes>
  <definition>A topic which is new.</definition>
  <sources>
    <source uri="https://en.wikipedia.org/wiki/New_Topic"/>
  </sources>
</term>
```

15. (Optional) Repeat steps 22-23 for each source.

16. Save changes made to index XML file.

Update newsletter schema

1. Open `newsletters.xsd`.
2. Starting in line 23, each keyword is listed in the following format:

```
<xs:restriction base="xs:string">
  <xs:enumeration value="American Fur Company"/>
  <xs:enumeration value="Hudson's Bay Company"/>
```



```
...  
</xs:restriction>
```

3. The easiest way to add a new keyword is to add it above the topmost keyword in the same format. For example, if our new keyword was “Example Keyword”, we would add it like this:

```
<xs:restriction base="xs:string">  
  <xs:enumeration value="Example Keyword"/>  
  <xs:enumeration value="American Fur Company"/>  
  <xs:enumeration value="Hudson's Bay Company"/>  
  ...  
</xs:restriction>
```

4. Repeat for each keyword added to index.xml and/or naf.xml.
5. Save changes made to newsletter schema file.

Update prototype

1. Open prototype XSLT file (create_html_prototype.xsl) using a program like Visual Studio that can run XSLT files.
2. Run an XSLT transformation on either the index, NAF, or newsletter XML file (index.xml, naf.xml, or newsletter.xml).
3. Check output HTML file to ensure it looks correct (prototype.html).

Workflow: Editing metadata about a keyword or newsletter

1. If editing a newsletter, open the newsletter XML file (newsletter.xml) If editing a keyword that is an agent (person, family, or corporation), open the name authority XML file (naf.xml). Otherwise, open the index XML file (index.xml).
2. Each newsletter, index term, or agent is contained within opening and closing tags. Locate the opening and closing tags surrounding the newsletter, index term, or agent to be edited.

Here is newsletter #2...

```
<newsletters>
  <newsletter>
    <title>Newsletter #1</title>
  </newsletter>
  <newsletter>
    <title>Newsletter #2</title>
  </newsletter>
  <newsletter>
    <title>Newsletter #3</title>
  </newsletter>
</newsletters>
```

...and term #1...

```
<newsletterIndex>
  <term>
    <preferredTerm>Index term #1</preferredTerm>
  </term>
  <term>
    <preferredTerm>Index term #2</preferredTerm>
  </term>
  <term>
    <preferredTerm>Index term #3</preferredTerm>
  </term>
</newsletterIndex>
```

...and agent #3

```
<nameAuthorityFile>
  <agent>
    <preferredName>Agent #1</preferredName>
  </agent>
  <agent>
    <preferredName>Agent #2</preferredName>
  </agent>
  <agent>
```

```

    <preferredName>Agent #3</preferredName>
  </agent>
</nameAuthorityFile>

```

Adding new metadata

All possible metadata fields for index terms according to the index schema (index.xsd) are listed in order of appearance on pages 3-4.

All possible metadata fields for agents according to the name authority schema (naf.xsd) are listed in order of appearance on pages 5-9.

All possible metadata fields for newsletters according to the newsletter schema (newsletters.xsd) are listed in order of appearance on pages 13-14.

To add a metadata field for a term, agent, or newsletter that does not appear in its XML file, add the opening and closing tags from the “Attribute/element” column between the appropriate elements. For example, if adding an alternate name to an agent, it must come directly after the preferred name.

```

<agent id="Abigail_Abby_Perry_Pearce_Casey" agentType="person">
  <preferredName>Abigail "Abby" Perry Pearce Casey</preferredName>
  <alternateName>Mrs. Casey</alternateName>
  <family relatedAgent="Casey"/>
  <dateOfMarriage relatedAgent="Silas_Casey_II">
    <year>1830</year>
  </dateOfMarriage>
  <hasSpouse relatedAgent="Silas_Casey_II"/>
  <demographicTerm uri="http://id.loc.gov/authorities/demographicTerms/dg2015060004"/>
</agent>

```

The new information must come between the opening and closing tags. Attribute values must be within the opening tag. See the workflow “Adding a new keyword” for further explanation and examples.

Deleting existing metadata

Some metadata fields are required according to their schemas. Check the workflows “Adding a new newsletter” or “Adding a new keyword” to make sure the metadata field is marked as optional before deleting it.

To delete a metadata point, delete the opening tag, closing tag, and everything in between. The opening and closing tags including the angle brackets that surround them (< >). For example, to delete a date of marriage for an agent:

```
<agent id="Abigail_Abby_Perry_Pearce_Casey" agentType="person">
  <preferredName>Abigail "Abby" Perry Pearce Casey</preferredName>
  <alternateName>Mrs. Casey</alternateName>
  <family relatedAgent="Casey"/>
  <dateOfMarriage relatedAgent="Silas_Casey_II">
    <year>1830</year>
  </dateOfMarriage>
  <hasSpouse relatedAgent="Silas_Casey_II"/>
  <demographicTerm uri="http://id.loc.gov/authorities/demographicTerms/dg2015060004"/>
</agent>
```

Everything highlighted in yellow must be deleted.

Update newsletter schema

This step is necessary if the preferred name or preferred term is updated for an agent or index term.

1. Open newsletters.xsd.
2. Starting in line 23, each keyword is listed in the following format:

```
<xs:restriction base="xs:string">
  <xs:enumeration value="American Fur Company"/>
  <xs:enumeration value="Hudson's Bay Company"/>
  ...
</xs:restriction>
```

3. Locate the previous preferred version of the keyword, and replace the text between quotation marks with the new preferred version. For example, if we wanted to replace "American Fur Company" with "Different Company Name":

```
<xs:restriction base="xs:string">
  <xs:enumeration value="Different Company Name"/>
  <xs:enumeration value="Hudson's Bay Company"/>
  ...
</xs:restriction>
```

4. Repeat for each keyword edited in index.xml and/or naf.xml.
5. Save changes made to newsletter schema file.