Read the *entire* instructions before you try to follow them. Knowing where you are going will help.

Reference for needed materials:
- ❖ Metadata templates
- ❖ METS Production Task and its associated TEI roles spreadsheet
- ❖ Mets Student Roster

Creating a TEI Header Metadata Spreadsheet

In order for the work we do to be recorded and recognized, metadata about production staff and roles will be stored in all XML files generated for the website. We need to collate this information into a spreadsheet for each file within the InDesign export books; the spreadsheets will include the names of each person who worked on that file and the roles they performed.

It is important to note that the production terms that METS uses in-house differ from the language we officially use in the TEI headers to describe the roles that people perform.
- ❖ One production step for METS can equal several individual roles as recorded in the TEI header.
  - ➢ Ex. The term Bib Check refers to a particular step of our print production process, but covers three separate roles:
    - ■ Checked and corrected bibliographic references
    - ■ Ensured adherence to METS Style Guide
    - ■ Entered corrections for print edition
- ❖ To make it easier to map the language of our production terms to the language of the TEI Header roles, we have made templates for you to start with.
  - ➢ There is one template for approximately each type of file that will need this metadata.
    - ■ We have separate templates because not all spreadsheets will contain the same information.
    - ■ The template for "Basic File" represents a file that does not have any specific roles associated with Bibliography Check or Manuscript Read.
    - ■ If you can't find a template that immediately fits the file, consult the Managing Editor about which template would work best
  - ➢ Some spreadsheets will have overlapping information that you can copy and paste across spreadsheets when appropriate.
  - ➢ You can find the templates in our METS Google Drive folder.
- ❖ We have populated the templates with the relevant production tasks and the roles that align with them.

❖ See below, a screenshot from the Introduction spreadsheet

	A	B
1	**Contributor Name**	**Contributor Role**
2		
3	First Read	Copyedited and proofread
4	First Read	Ensured adherence to METS Style Guide
5	First Read	Reviewed edition for consistency and audience
6	First Read	Reviewed edition for content and scholarship
7	First Read	Wrote reader report
8		
9	Second Read	Audited documents prior to print/export
10	Second Read	Checked and corrected bibliographic references
11	Second Read	Copyedited and proofread
12	Second Read	Ensured adherence to METS Style Guide
13	Second Read	Reviewed edition for consistency and audience
14	Second Read	Wrote reader report
15		
16	Bib Check	Checked and corrected bibliographic references
17	Bib Check	Ensured adherence to METS Style Guide
18	Bib Check	Entered corrections for print edition

❖ Note how, in the template, the Contributor Name column is filled with an in-house production term as a placeholder, and the Contributor Role column has multiple roles associated with each production term.
❖ For reference, the full list of each METS Production Task and its associated TEI roles can be found here.

The spreadsheets have two sheets to them: Contributors and Dropdowns
   ❖ The first sheet is where we enter the metadata information via selecting options from dropdown menus
   ❖ The second sheet is where we keep and update our controlled vocabulary that populates the dropdown menus on the first sheet.

We will need one spreadsheet for each InDesign file that will be exported and turned into an XML file. These files all live in the XML Export book folders of the particular edition you are looking at.
   ❖ You'll want to build these spreadsheets in the order of the files that are in the Export Book of the edition you are working on. Start with the file labeled with the section number 01
   ❖ Ex. For the Livingston-Knyghthode-XML book, you will start with the file labeled Livingston-Knyghthode-01-Acknowledgments (see below)

Livingston-Knyghthode-01-Acknowledgments.indd
Livingston-Knyghthode-02-Abbreviations.indd
Livingston-Knyghthode-03-Intro.indd
Livingston-Knyghthode-04-Bataile-Prologue-Verse.indd
Livingston-Knyghthode-05-Bataile-Prologue-Enotes.indd
Livingston-Knyghthode-06-Bataile-Prologue-Tnotes.indd
Livingston-Knyghthode-07-Bataile-Part1-Verse.indd
Livingston-Knyghthode-08-Bataile-Part1-Enotes.indd
Livingston-Knyghthode-09-Bataile-Part1-Tnotes.indd
Livingston-Knyghthode-10-Bataile-Part2-Verse.indd
Livingston-Knyghthode-11-Bataile-Part2-Enotes.indd
Livingston-Knyghthode-12-Bataile-Part2-Tnotes.indd
Livingston-Knyghthode-13-Bataile-Part3-Verse.indd
Livingston-Knyghthode-14-Bataile-Part3-Enotes.indd
Livingston-Knyghthode-15-Bataile-Part3-Tnotes.indd
Livingston-Knyghthode-16-Bataile-Part4-Verse.indd
Livingston-Knyghthode-17-Bataile-Part4-Enotes.indd
Livingston-Knyghthode-18-Bataile-Part4-Tnotes.indd
Livingston-Knyghthode-19-Bataile-Headnote.indd
Livingston-Knyghthode-20-App.indd
Livingston-Knyghthode-21-Bib.indd

Make a copy of the relevant template in the edition's folder in Google Drive.
- ❖ Copy the TEI-Metadata-Spreadsheet-Acknowledgments spreadsheet in Google Drive and paste it in the Livingston-Knyghthode folder
- ❖ Rename the document
  - ➢ You'll want to make sure that the title of your spreadsheet **exactly matches** the title of the InDesign file that you are collecting metadata for
    - ■ So in this case, your spreadsheet should be called Livingston-Knyghthode-01-Acknowledgments.xlsx
    - ■ Check carefully that the titles exactly match, otherwise this will make later workflow steps more difficult.

Next, make sure you have open the METS Student Roster
- ❖ This spreadsheet is where we record:
  - ➢ All production tasks completed for each edition
  - ➢ The names of every in-house METS staff editor who worked on each production task
  - ➢ The timeline they completed the tasks in
- ❖ The spreadsheet divides this information into two sheets:

> ➢ Print Production
> ➢ Digital Production
> ➢ You'll be combining the information from both of these sheets into your singular spreadsheet.

Locate the edition you are working on in the METS Student Roster spreadsheet and enter the names of everyone involved with the edition's production into your spreadsheet's Dropdowns sheet, under the column Contributor Names.
- ❖ You'll be replacing any instance of "Name" with the staff member's name
- ❖ Names should be entered in the following order: Lastname, Firstname MiddleInitial
- ❖ Double check the spelling of these names.
- ❖ Make sure you check both Print Production and Digital Production for names. There may be people who worked on one side of production and not the other.

This step adds these Names to the Dropdown menus you use to fill in Contributor Name
- ❖ It's okay if you have "Name" spaces left over.

Adjusting Dropdown Settings

If you run out of Names to replace, add all the names that you need to the end of the list. Then, you will need to adjust the dropdown settings so any extra names will show up in the dropdown menu.

Google Sheets:
Go to the Contributors sheet.
- ❖ Click the down arrow next to one of the Contributor Name entries
- ❖ Click the Edit button at the bottom of the dropdown menu. It looks like a pencil at the bottom right of the menu.
- ❖ This will open up a menu alongside the right of the screen called Data Validation Rules
- ❖ You'll want to pay attention to two categories: Apply to Range and the second option under Criteria

- ❖ Apply to Range
  - ➢ This entry box defaults to whatever cell you have clicked into. We want to make sure that any changes made are applied to the entire column Contributor Name, not just the cell you clicked.
    - ■ To change this, click the grid icon at the right of the entry box.
    - ■ Then, select the cells 2 through 1000 in column A. This will be reflected in the menu Select a Data Range that pops up. It should look like this:

  - ➢ Go to the second entry for Criteria. It should look like an equation: =Dropdowns!$A$2:$A$31
    - ■ This equation is what determines the range of cells that populate the dropdown menu.
    - ■ Change the final number to the number of the cell that holds the final name.
  - ➢ Then, click Done. This should update the dropdown menu to include all the names.

Microsoft Excel:

Go to the Contributors sheet.

- ❖ Click into one of the Contributor Name entries
- ❖ Along the top, click the Data menu, then click Data Validation. This will pull up a menu that looks like this:
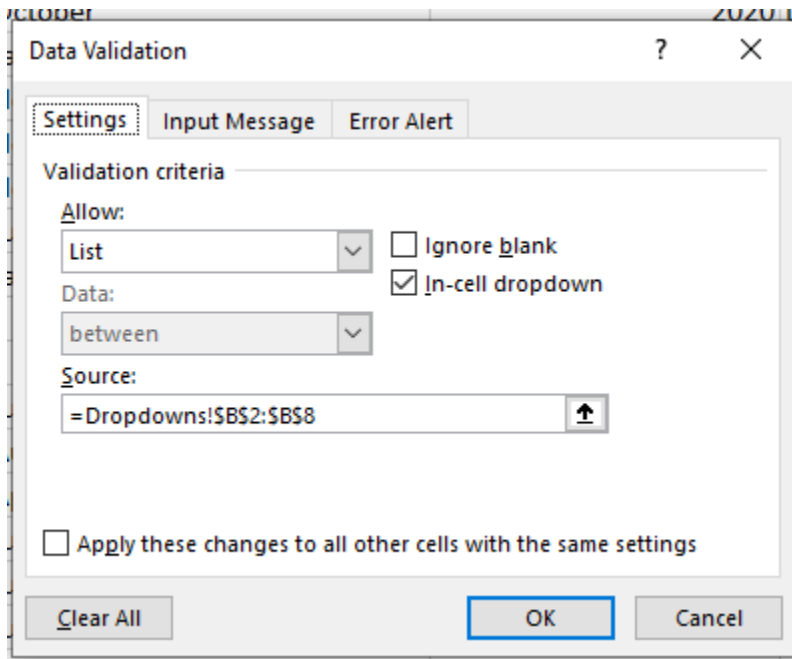
- ❖ Click into the entry point for Source. It should automatically swap views of the sheets from the Contributors sheet to the Dropdowns sheet, as well as show you which cells are currently included in the range.
- ❖ Change the final number to the number of the cell that holds the final name.
- ❖ While you are on this screen, check the box next to "Apply these changes to all other cells with the same settings." This will apply the settings we have just updated to all other similar cells in the spreadsheet.
- ❖ Then click Ok. This should update the dropdown menu to include all the names.

Assign names and dates to the tasks they completed in the Contributors sheet

---

- ❖ First, check to see if there are multiple people who performed that task.
  - ➢ Each of these production tasks can have two to three people contributing to them.
  - ➢ If there are multiple people who performed that task, copy the whole list (both columns) and paste it at the bottom of the document.
    - ■ Ex, If three people performed Bib Check on one edition, then you will want to copy and paste the whole list two more times at the bottom of the spreadsheet.

❖ For each task, you will replace each production task placeholder with the name of the person who performed that task, using the dropdown menu.
❖ You'll also want to fill in the dates.
  ➢ If there is only one date listed, that date will serve as both the beginning and ending dates.
  ➢ If there are no dates associated with a particular task, leave the fields blank. We are okay with partial data here.

Ex. Alan Lupack did a first read for the Livingston-Knyghthode edition, so his name replaces all instances of First Read in the Contributor Name column. The METS student roster spreadsheet only lists one date for Alan, so it will be both his Begin and End dates.

Contributor Name	Contributor Role	Begin Contribution Month	Begin Contribution Year	End Contribution Month	End Contribution Year
Lupack, Alan	Copyedited and proofread	March	2020	March	2020
Lupack, Alan	Ensured adherence to METS Style Guide	March	2020	March	2020
Lupack, Alan	Reviewed edition for consistency and audience	March	2020	March	2020
Lupack, Alan	Reviewed edition for content and scholarship	March	2020	March	2020
Lupack, Alan	Wrote reader report	March	2020	March	2020

Ex. Russell A. Peck also did a first read for the Livingston-Knyghthode edition, so we have copied and pasted the list for First Read at the end of the document and filled it in. He has different dates for this step than Alan does, and so his Begin and End dates are entered accordingly.

Contributor Name	Contributor Role	Begin Contribution Month	Begin Contribution Year	End Contribution Month	End Contribution Year	
Assistant Editor	Collated and entered corrections					
Uploaded/Published digital edition	Uploaded / Published digital edition					
Peck, Russell A.	Copyedited and proofread	March	2020	April	2020	
Peck, Russell A.	Ensured adherence to METS Style Guide	March	2020	April	2020	
Peck, Russell A.	Reviewed edition for consistency and audience	March	2020	April	2020	
Peck, Russell A.	Reviewed edition for content and scholarship	March	2020	April	2020	
Peck, Russell A.	Wrote reader report	March	2020	April	2020	

The templates are here to make the process of collecting this metadata easier. The base information on the templates anticipates the majority of the types of roles that will need to be recorded for each text type. However, our records are complicated to wade through, in part because we have such a small staff working on many projects at the same time. Our records are often partial data, and the production terminology that we have used does not always match our newer controlled vocabulary.

❖ Sometimes when multiple people are working on the same task, they only do part of the task. This should be noted in the Notes column of the METS student roster. We use that column to note whether people did parts of specific production tasks, or if they did tasks in specific files as opposed to across the entire book.

- ➢ Double check the reference spreadsheet that maps all production task terminology onto the roles.
- ➢ You'll want to check the following:
    - ■ Which roles are associated with that particular step
    - ■ Which file types to enter that information on

Ex. For Livingston-Knyghthode, a staff member is listed as having participated in the InDesign formatting. However, there is a note that mentions they only did work on the semantic tagging.
- ❖ The reference spreadsheet says that if someone only works on semantic tagging:
    - ➢ We use the role "Formatted for XML export"
    - ➢ We enter in metadata only for text files and not any apparatus files
    - ➢ Therefore, we do not need to include it in the Acknowledgments spreadsheet, but we will need to include it for any spreadsheets that record information for the texts.

If you run into instances where there is either:
- ● A production task on the template spreadsheet that is not recorded on the METS student roster, or
- ● Information on the METS student roster that is not represented by tasks and roles on the template spreadsheet

Then you may have to do some investigating to see what is happening. Keep a queries sheet for you to make notes.
- ❖ Each edition you work on should have its own queries document
    - ➢ Please name the document following our naming conventions.
    - ➢ Ex. Livingston-Knyghthode-TEI-Metadata-Queries-SD
- ❖ Make a note if there seems to be a major hole in our records.
- ❖ Make a note of any instances where there is terminology that you don't understand how it matches roles.
- ❖ Note anywhere there seems to be more information in our records that doesn't match with roles as listed either in the templates or on the reference sheet.

Once you've entered all the names, we'll need to alphabetize all the entries and combine duplicate roles together.

Alphabetizing by Name
- ❖ We need the Contributor Names alphabetized in our spreadsheet so that our script will put these names alphabetized in our TEI header for all the XML documents.
- ❖ First, select all the text that you've entered into the spreadsheet so far.

❖ Right click in the first column > Data > Sort Range > Sort range by column A (A to Z)
❖ The result should reorder everything in alphabetical order according to Contributor Name

Check for duplicate entries within a Contributor Name's associated roles
❖ We don't want any duplicate roles to show up in our TEI Header. Instead, we want one entry of that role with a time span that includes the entirety of the time spent working on that role.
❖ Change one entry to have the earliest begin date and the latest end date associated with that role.
❖ Then delete the extras.

Ex. A staff editor has three entries for 'Entered corrections for print edition.'

Contributor Role	Begin Contribution Month	Begin Contribution Year	End Contribution Month	End Contribution Year
Audited documents prior to print/export				
Copyedited and proofread	March	2020	March	2020
Ensured adherence to METS Style Guide	February	2022	April	2023
Entered corrections for digital edition	February	2022	April	2023
Entered corrections for digital edition	February	2022	April	2023
Entered corrections for digital edition				
Entered corrections for print edition	March	2020	March	2020
Entered corrections for print edition	February	2022	April	2023
Entered corrections for print edition				
Formatted for print edition	March	2020	March	2020
Formatted for XML export	March	2020	March	2020
Formatted for XML export	February	2022	April	2023
Updated TEI encoding				
Collected metadata	November	2023	November	2023
Encoded TEI				

❖ One entry has no associated date information, and the other two have different begin and end dates from each other. We only need them to have one entry for 'Entered corrections for print edition' with dates that represent the entirety of when they worked on that task.
➢ The earliest begin date associated with that role is March 2020, and the latest end date is April 2023.

Entered corrections for print edition	March	2020	March	2020
Entered corrections for print edition	February	2022	April	2023
Entered corrections for print edition				
Formatted for print edition	March	2020	March	2020

➢ So, you would change the first entry of that role to have those dates

Entered corrections for digital edition				
Entered corrections for print edition	March	2020	April	2023
Entered corrections for print edition	February	2022	April	2023
Entered corrections for print edition				
Formatted for print edition	March	2020	March	2020

➢ Then delete the entire rows containing the extra two entries.

Entered corrections for print edition	March		2020 April	
Entered corrections for print edition	bruary		2022 April	2023
Entered corrections for print edition				
Formatted for print edition	March		2020 March	20
Formatted for XML export	March		2020 March	20
Formatted for XML export	February		2022 April	23
Updated TEI encoding				
Collected metadata	November		2023 November	23
Encoded TEI				
Entered corrections for digital edition	June		2022 August	23
Entered corrections for print edition	June		2022 August	23
Entered corrections for digital edition	February		2022 Novem.	23
Formatted for XML export	February		2022 Novembe	23

Context menu: Cut, Copy, Paste Options:, Paste Special..., Smart Lookup, Translate, Insert..., Delete...

Sort Roles alphabetically

It can be easier to see duplicate entries if you have already sorted the roles alphabetically.
- ❖ Select all the roles associated with one person's name.
  - ➢ Make sure you have also selected all the date information that is to the right of the roles.
- ❖ Data > Sort Range > Sort range by column B (A to Z)

Copyedited and proofread	arch	2020 March	2020
Entered corrections for prin		2020 March	2020
Formatted for print edition		2020 March	2020
Formatted for XML export		2020 March	2020
Entered corrections for digital edition	February	2022 April	2023
Entered corrections for prin		2022 April	2023
Entered corrections for digit		2022 April	2023
Formatted for XML export		2022 April	2023
Ensured adherence to METS		2022 April	2023
Audited documents prior to			
Entered corrections for digit			
Entered corrections for prin			
Updated TEI encoding			
Collected metadata	er	2023 November	2023
Encoded TEI			
Entered corrections for digit		2022 August	2023
Entered corrections for prin		2022 August	2023
Entered corrections for digit		2022 November	2023
Formatted for XML export		2022 November	2023
Ensured adherence to METS		2022 November	2023
Audited documents prior to			
Copyedited and proofread		20 March	2020
Ensured adherence to METS		20 March	2020
Reviewed edition for consis		20 March	2020
Reviewed edition for conter		20 March	2020
Wrote reader report		20 March	2020
Copyedited and proofread		20 April	2020
Ensured adherence to METS Style Guide	March	2020 April	2020

Context menu: Cut, Copy, Paste Options:, Paste Special..., Smart Lookup, Translate, Insert..., Delete..., Clear Contents, Quick Analysis, Filter, Sort (Sort A to Z, Sort Z to A, Put Selected Cell Color On Top, Put Selected Font Color On Top, Put Selected Formatting Icon On Top, Custom Sort...), Insert Comment, Format Cells..., Pick From Drop-down List..., Define Name..., Link

- ❖ This will group any duplicate roles together

Contributor Role	Begin Contribution Month	Begin Contribution Year	End Contribution Month	End Contribution Year
Audited documents prior to print/export				
Copyedited and proofread	March	2020	March	2020
Ensured adherence to METS Style Guide	February	2022	April	2023
Entered corrections for digital edition	February	2022	April	2023
Entered corrections for digital edition	February	2022	April	2023
Entered corrections for digital edition				
Entered corrections for print edition	March	2020	March	2020
Entered corrections for print edition	February	2022	April	2023
Entered corrections for print edition				
Formatted for print edition	March	2020	March	2020
Formatted for XML export	March	2020	March	2020
Formatted for XML export	February	2022	April	2023
Updated TEI encoding				
Collected metadata	November	2023	November	2023
Encoded TEI				

An optional sorting step: Add blank rows in between people

It can be easier to see where one person's entries stop and another's begins if you add blank rows in between each grouping of Contributor Names.

❖ Right click on the cell where the name changes to a different person.
❖ Then, select Insert 1 Row Above
❖ And then your document will have better separations between different Contributor Names.

If you add blank rows between groupings of Contributor Names, you will need to remove these blank rows before uploading to Box.
● This can be done by deleting individual rows.
● This can also be done by alphabetizing all the names again. (See above.)

Please do note: Some of this information changes between documents, but generally there is quite a bit that stays the same across spreadsheets. As you work on this more, you'll get a sense of where you can copy and paste across documents. Some editions are going to have many, many, many spreadsheets associated with them. Please copy and paste where you can.

If there are multiple files that are the same type (text, explanatory note, etc), you can save time by copying and pasting the entire file, then renaming it.

Ex. The files Livingston-Knyghthode-08-Bataile-Part1-Enotes and Livingston-Knyghthode-11-Bataile-Part2-Enotes will have the same metadata because the same people did the same steps across both files.

- ❖ Once you have completed making the spreadsheet for Livingston-Knyghthode-08-Bataile-Part1-Enotes, make a copy of the document and paste it within your metadata folder.
- ❖ Then, rename the copy spreadsheet to Livingston-Knyghthode-11-Bataile-Part2-Enotes

Copying and pasting entire files can save you a lot of time. However, you still need to check the METS student roster in case any of these files had individualized work done to them. (i.e., if Part2-Enotes had an extra person helping with the Bib Check who did not work on Part1-Enotes).

When all spreadsheets have been complete, upload them to Box so that they can be accessed by our webform.