

Collecting Metadata Categories

For each Text within an Edition, we need to collect Metadata Categories. See below for Instructions

1. Open the Master Editions spreadsheet, where all texts and volumes are listed. You will need to add all the Texts in this new Edition to the list. The editions are listed chronologically by publication date, so In the “Texts” tab, scroll to the very bottom. Fill in columns A-D: Edition Title, Author, Editor(s), and Translator.
 - a. To see the edition’s official title, go to its Creative Cloud folder. This will be listed by the Editor’s name (if you’re unsure of what this is, ask the Managing Editor). Go to the PDF folder, and open the Front Matter. Scroll to p. iii, the title page; this page will list the full Edition Title, major author, and editor names.
2. For Text titles, scroll to the Table of Contents. Add ALL text titles in column G, Titles of Works Contained. List ONLY Text titles, not apparatus (like introductions, notes, or bibliographies).
 - a. If authors of individual texts are listed, add them to the corresponding cell in column B: Author.
 - i. Sometimes, an author may not be listed in the ToC but the Volume Editor will discuss possible authors in the (Text’s) Introduction. For texts where no authors are listed, search the introduction to see if an ascribed author (proposed but not agreed upon by all scholars) is discussed.
 - ii. If so, add the ascribed author’s name in parentheses: (John Lydgate).
 - iii. If not, leave column B blank.
 - b. If there are Section Divisions, i.e., titles for various sections containing one or multiple texts, list them under column E: Section Divisions.
 - c. **Important:** If your edition includes any Appendices, consult the Managing Editor. They and the Executive Director will decide if these count as Texts (see column I) and thus will receive metadata.
 - i. If they decide it’s not a Text, add it to the “Not Texts” tab. By column, add the edition title, author, editor, section division (if applicable), title of the work, brief description, and categorization. In column I, Categorization, record briefly why the Managing Editor does not consider it a text. For the implications for our workflow, see #4, below.
3. Ignore Columns G-H; these are only important for legacy HTML editions.
4. Under Column I: Categorization, type “Text.” NB: Labeling something a Text has certain ramifications for our digital workflow; it usually means that this piece of work will appear online, be formatted as a Text online, will receive semantic tagging and metadata. Contrast this with “not texts” in the eponymous tab; these are pieces of work included in the print edition which may or may not be reproduced online, but may require special formatting, and will not receive semantic tagging or metadata.
5. Next, you’ll fill in the Categories for each Text. Open the Metadata Categories list to view the options; make sure you are in the fourth tab, Categories and Tags - Glossary Consistent - dk. You’ll see that there are 4 kinds of information we consider Categories:

Form, Language, Time Period, and Additional Tags. Additional Tags usually indicate a literary genre or textual tradition.

- a. In the Master Editions spreadsheet, every single Text you've listed under column F will need to have filled in a Language, Time Period, and Form (Columns J-L). Additional Tags are optional if not specified in the edition. For each Category, you will choose from the Values (Column B) listed in the Metadata Categories list.
- b. Look at the Introduction(s) of the edition to find the needed Categories. In the Creative Cloud > PDF folder, open up the relevant Introduction (there may be multiple).
- c. For multi-text volumes it's also worth opening up the Explanatory Notes – the Volume Editors sometimes include headnotes at the beginning of each text's e-notes with more basic information than may be covered in a General Intro.
 - a. First fill in the Language (column J) from the Value options: You may be able to identify the language most easily from opening up the Text itself. Middle English and Scots will be untranslated; all the other options should have full facing-page translation. If you do not recognize the language, search for it in the volume's Introduction. (For multi-text editions, check to see if the Text has its own introduction or if there's only a General Introduction. If there is a Text-specific introduction, search within that.) If you recognize the language as French, look for its date to determine which of the 3 options it is. If you cannot find what kind of French or its date in the Intro, alert the Managing Editor.
 - If needed, you can search the InDesign files (preferably in the XML Export Book) for language tags. We mark all instances of any **non-dominant languages** in InDesign. To do this, **make sure that nobody else is in the Book** and open the appropriate text file(s). In Character Styles, open the Common folder, click the hamburger menu, and click "Select All Unused." All the tags that are highlighted blue are NOT used in this text. You can skim for the language tags (Latin, Middle and Old French, Hebrew, and Arabic) to see if they're highlighted.
 - If they're not highlighted – meaning they do appear in the Text – you can run a search for that particular tag to see where/how often it appears. To do this, put your cursor at the beginning of the Text (using the Text tool), control-F to find, under Find Format, click the magnifying glass icon and in the Character Styles, choose the language tag you're looking for (say, Latin). Then, you can Find Next to see where it's applied.
 - If you find there are a lot of instances of the language tag, you can also add a color to the tag, to make its applications visible. In the Character Styles menu, right click on the tag, choose Edit [Style], and in the left sidebar, choose Character Color. There, you can click whatever color you'd like, click OK, and all instances of that

language tag will turn that color in the text. Based on this, you can estimate how much of the Text is in that language.

- b. Fill in the Time Period (column K). To do this, check the relevant Introduction. I'd suggest running a search for "date" or "century." Skim the headings for anything that discusses date or dating, and read through that section. Remember that for numerical years, for example, 1485, is fifteenth-century (**not** fourteenth-century).
 - Sometimes the text's date of composition will be different from the date of preservation in the base MS. If that's the case, prioritize listing the text's date of composition. Only if this isn't listed, list the date of the MS.
 - **Exception:** Texts within codex volumes should always list the date of preservation in the MS!
 - c. Fill in the Form (column L): This should be obvious from glancing at the Text. Scroll through it to see if there are any sections that look different from the majority of the text (poetry in a prose text or vice versa?). If both poetry and prose appear, list it as Mixed poetry and prose.
 - i. Drama will start with a Dramatis Personae (cast list) and have speaker names in small caps.
 - ii. Codex editions should have a title that includes an MS shelfmark, but if you're unsure whether an edition is a codex, ask the Managing Editor.
 - d. Fill in Additional Tags (column M): Because these focus on genre or literary tradition, they are the slipperiest to identify and there may be multiple tags applicable. Skim the relevant Introduction for any headings discussing genre or do a search for "genre." NB: See the Additional Tags Glossary for definitions of different genres. Match up what the Volume Editor says as closely as possible to the tags, and list all possibilities. If you're unsure which Additional Tags are relevant or are trying to choose between a few subcategories, consult the Managing Editor.
 - If the Text is poetry, also keep an eye out for its stanzaic form: if it uses bob and wheel, rhyme royal, or tail rhyme, add those tags. You can search for these phrases in the relevant Introduction.
 - If the Text(s) include any music, identify what genre or form by skimming the relevant Introduction. In the Additional Tags Glossary, see Music and the sub-genres thereunder. Alert the Managing Editor that music appears in your texts; they will ensure a resident musicologist reviews your work.
6. When you're done, make sure to fill in column N with your initials and the date.