

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

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We collect edition-level metadata to populate the Source Description and Revision Description sections of our TEI Headers. These two sections will remain the same across all TEI-XML files from the same edition, so we can collect all editions' data on the same spreadsheet from which our transformation script will pull information.

Currently our parent spreadsheet is organized by Masthead Year, with the oldest editions at the top of the spreadsheet and newest editions at the bottom of the spreadsheet.

N.B.: Instructions are a little different for if you are **adding information for a new edition** or **updating information for an older edition**; please make sure you go to the appropriate section.

N.B. May 2024: This spreadsheet is currently in progress. Entries that have been completed filled in with information verified have been highlighted with a light green. As we continue to verify entry information for backlog editions, please continue to highlight completed entries light green. Once we have finished all backlog entries, we will clear the background color.

### **Adding information for a new edition**

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Make a new entry at the bottom of the list.

#### *File Short Title*

This is the two word, hyphenated phrase used at the beginning of all our File Naming Conventions. Our transformation script will use this phrase from our file names to figure out which row of information to pull into the TEI header.

#### *Full Edition Title*

Include the title as printed on the front cover of the edition.

#### *Author*

Consult the Edition Spreadsheet for any authors associated with the edition. You should include all texts contained within an edition.

- When first names and last names are known, use “[LastName], [FirstName]” structure.
  - Ex. Caxton, William
- When there is a first name and a location provided, use “[Name] of [Location]” structure.
  - Ex. Thomas of Hales

- Include any authors that are ascribed to have written a text
- If there is no author definitively known, write “Unknown.”
  - You only need to include Unknown once, even if there are multiple texts written by unknown authors.
- If there are multiple authors (including any Unknown authors), use a semicolon in between each name to create a list. All names should go in the same cell.
  - Ex. Caxton, William; Thomas of Hales; Unknown

### *Editor*

Include all editors listed on the front cover **in the order they are presented on the cover**. Note: this is not always alphabetical order.

- Use “[LastName], [FirstName] [I.]” structure
  - Initials should have a period following them. If there are multiple middle initials, there should be a space in between the initials.
  - Ex. Wright, Mark J. B.
- If there are multiple editors, use a semicolon in between each name to create a list. All names should go in the same cell.
  - Ex. McShane, Kara L.; Wright, Mark J. B.

### *Translator*

Include all translators listed **in the order they are presented**.

N.B. This is not always alphabetical order. Check the Edition Spreadsheet carefully to ensure you haven’t missed a translator.

N.B. Translators may be the same person as one of the editors. If this is the case, still enter their name under the translator column.

- Use “[LastName], [FirstName] [I.]” structure
  - Initials should have a period following them. If there are multiple middle initials, there should be a space in between the initials.
  - Ex. Wright, Mark J. B.
- If there are multiple translators, use a semicolon in between each name to create a list. All names should go in the same cell.
  - Ex. McShane, Kara L.; Wright, Mark J. B.

### *Masthead Year*

This is the publication year. Put the year that appears in the frontmatter. Our transformation script will use this information to connect to another spreadsheet that includes all the masthead information.

### *Revisions*

Here we enter records for the large-scale changes and updates made to editions. We will enter all revision versions in this column as a semi-colon delineated list. We use the following controlled vocabularies:

First edition published in #####

Second edition published in #####

Revised in #####

Encoded in TEI in #####

Entered editorial corrections in #####

Updated TEI in #####

Entered editorial corrections and updated TEI in #####

**N.B.** ##### stands in for the year that that change was made.

You will want to add these statements as they apply separated by semicolons in the Revisions column.

- Ex. The edition Wiggins-Guy (2004) has been updated through formatting in InDesign and transformed into TEI-XML files in the year 2024. This process did not include any editorial corrections.
  - You would add “Encoded in TEI in 2024” after a semicolon, so the full entry would be “Encoded in HTML; Encoded in TEI in 2024”
- Ex. The edition Staley-Margery (1996) has been updated through formatting in InDesign and transformed into TEI-XML files in the year 2024. This process included correcting typos and updating cross-references.
  - You would add “Entered editorial corrections in 2024” and “Encoded in TEI in 2024” after semicolons, so the full entry would be “Encoded in HTML; Entered editorial corrections in 2024; Encoded in TEI in 2024”
- Ex. The edition Laskaya-Breton (1995) is going into a second edition. The second edition has been formatted in InDesign and transformed into TEI-XML files in the year 2024.
  - Replace what currently exists in the Revisions column with “First edition published in 1995”, then add “Encoded in HTML”; “Second edition published in 2024”; and “Encoded in TEI in 2024”
  - The full entry would be: “First editions published in 1995; Encoded in HTML; Second edition published in 2024; Encoded in TEI in 2024”

## Updating information for an older edition

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We will need to come back to this spreadsheet and update edition-level metadata for older editions as we continue to convert them from WordPerfect/HTML editions into InDesign/TEI editions. **In order to fill in / verify this information, please find the physical book copy of the edition in question in addition to referencing the Edition Spreadsheet.**

N.B. There is some color-coding happening in the older editions. Any entry with a background highlight color of light green is an entry that has been fully checked and verified. Any entry with a background highlight color of light red is an entry that comes with complications; look for a comment noting what needs to be sorted out.

### *File Short Title*

These should all be filled in, but double-check that naming conventions have not changed in the interim.

### *Full Edition Title*

Verify that the title matches the title as printed on the front cover of the edition. If there is a second edition or a revised edition, make sure the title matches the title printed on the front cover of the newest edition available.

### *Author, Editor, and Translator*

The information for Authors, Editors, and Translators has already been filled in. Please double check that all attributions are included and in the correct order by verifying against the Edition Spreadsheet.

### *Author*

- When first names and last names are known, use “[LastName], [FirstName]” structure.
  - Ex. Caxton, William
- When there is a first name and a location provided, use “[Name] of [Location]” structure.
  - Ex. Thomas of Hales
- Include any authors that are ascribed to have written a text
- If there is no author definitively known, write “Unknown.”
  - You only need to include Unknown once, even if there are multiple texts written by unknown authors.
- If there are multiple authors (including the Unknown authors), use a semicolon in between each name to create a list. All names should go in the same cell.
  - Ex. Caxton, William; Thomas of Hales; Unknown

### *Editor*

Include all editors listed on the front cover **in the order they are presented on the cover**. Note: this is not always alphabetical order.

- Use “[LastName], [FirstName] [I.]” structure
  - Initials should have a period following them. If there are multiple middle initials, there should be a space in between the initials.
  - Ex. Wright, Mark J. B.
- If there are multiple editors, use a semicolon in between each name to create a list. All names should go in the same cell.
  - Ex. McShane, Kara L.; Wright, Mark J. B.

### *Translator*

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  - Ex. Wright, Mark J. B.
- If there are multiple translators, use a semicolon in between each name to create a list. All names should go in the same cell.
  - Ex. McShane, Kara L.; Wright, Mark J. B.

### *Masthead Year*

This is the publication year. This data should already be entered; please verify that this information is correct against the physical copy. If you notice that your masthead year has a letter following it (1994a) or that other editions from the same year have a letter but yours does not, you’ll need to compare the masthead information in the physical copy against the masthead information recorded in the METS Complete Masthead spreadsheet and enter the appropriate year. The goal is to match the entry under Masthead Year exactly with the titles of the Sheets on the Complete Masthead spreadsheet.

There are some editions that have first and second/revised editions published, or are being published in a new edition. If you are working with one such edition, enter the masthead year of the most recent edition.

- Ex. First edition published in 1997. Second edition published in 2000. – use 2000 for the masthead year.

- Ex. First edition published in 1995. Second edition is being put into InDesign and published in 2024. – use 2024 for the masthead year.

### *Revisions*

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First edition published in #####

Second edition published in #####

Revised in #####

Encoded in HTML

Encoded in TEI in #####

Entered editorial corrections in #####

Updated TEI in #####

Entered editorial corrections and updated TEI in #####

### Notes

- ##### stands in for the year that that change was made
- We do not include year information for HTML encoding information, as this is not well recorded
- All backlog editions that currently have first and second/revised editions have had this information recorded accurately in the Revisions column, but this should be double checked.

You will want to add these statements as they apply separated by semicolons in the Revisions column.

- Ex. The edition Wiggins-Guy (2004) has been updated through formatting in InDesign and transformed into TEI-XML files in the year 2024. This process did not include any editorial corrections.
  - You would add “Encoded in TEI in 2024” after a semicolon, so the full entry would be “Encoded in HTML; Encoded in TEI in 2024”
- Ex. The edition Staley-Margery (1996) has been updated through formatting in InDesign and transformed into TEI-XML files in the year 2024. This process included correcting typos and updating cross-references.
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- Ex. The edition Laskaya-Breton (1995) is going into a second edition. The second edition has been formatted in InDesign and transformed into TEI-XML files in the year 2024.

- Replace what currently exists in the Revisions column with “First edition published in 1995”, then add “Encoded in HTML”; “Second edition published in 2024”; and “Encoded in TEI in 2024”
- The full entry would be: “First editions published in 1995; Encoded in HTML; Second edition published in 2024; Encoded in TEI in 2024”

As long as we are still working through updating all the backlog, we need to mark which editions’ entries have been updated. When you have finished verifying an edition, please select the entire row and change the background color to be a light green.