THE MAKING OF CHARLEMAGNE'S EUROPE (768-814)

USER GUIDE FOR DATA ENTRY

Version 18 (20.01.2015)

Material to be covered in the database:

- anything that looks like a document – in doubt, include (e.g. this covers the polyptych for St Victor of Marseilles and the *Notitia Arnonis*).

- Dates: 25 September 768 to 28 January 814 in all regions under consideration (e.g. Italy and Bavaria should also be included from 768).

- Forgeries: include any forgeries made between 768 and 900 purporting to be from the reign of Charlemagne (i.e., not including forgeries from this period claiming to be from the Merovingian era, which would require researching a whole new set of editions). This is obviously arbitrary, but that way we'll still have a place for Carolingian-era forgeries, without clogging the database (or our lives) with obvious 12^{th}-c. forgeries. In practice, given the difficulty of dating forgeries in cartularies, this will mean single-sheet originals dated palaeographically to the late eighth or ninth century.

Database overview

All elements in the database are derived from documentary sources. Each source is described and given a unique ID number in the ‘Charter’ main model.

Three main building blocks for the database are extracted from these source Charters: ‘Agent’, ‘Place’, and ‘Object’ (for example: ‘Charlemagne’ is an Agent).

‘Factoids‘ then formulate statements by creating relationships between these building blocks (for example: ‘Charlemagne grants Object X’ is a factoid). ‘Factoids’ differ from ‘facts’ in that their ambition is limited to reflecting statements made in the source Charter, without passing any judgement as to these statements’ truthfulness or otherwise. Each factoid is attributed to a particular source Charter, and assigned a date or date-range.

- ‘Transaction factoids’ relate all three types of building block to each other at once, by breaking down each Charter into one or more Transactions, each involving Agent, Place and Object in a variety of different roles (for example: ‘Agent A grants Object B at Place C to Agent D’).

- ‘Miscellaneous factoids’ are similar to Transaction factoids, and also connect Agents, Objects and Places to each other, but are used for statements which cannot be reduced to a Transaction model (for example: ‘Agent A killed Agent B at Place C’).

In addition, ‘Agent’ and ‘Place’ each have their own dedicated factoid models designed to record further information characterising them in a source Charter:

- for Agent: ‘Agent attribute and relationship factoids’, recording each particular Agent’s personal attributes, such as ethnicity, title, legal status, but also relationships to other agents, such as family or lordship relationships (for example: ‘Charlemagne is king’, ‘Baugulf is abbot of Fulda’, ‘Hildeprand is missus of Charlemagne’).

- for Place: ‘Place relationship factoids’, recording each particular Place’s situation in relation to other Places (for example: Place A is in Place B).

I: CHARTER (main model):

This is our basic source unit. Each has one ID number (automatically generated). A single charter can contain what we will treat as several different transactions.

MAIN INFO:

- **Diplomatic classification** (authority list): includes: 'charter', 'diploma', 'testament', 'notice', 'inventory', 'placitum', 'agreement'.
    - This corresponds to the standard modern diplomatic classification, i.e. not necessarily the same as the characterisation of the document offered in the original source text. These are intended to be very broad categories and should not be multiplied.
    - The main possible source of confusion to watch out for here is with 'Transaction type':
        - 'Diplomatic classification' should, in essence, reflect existing diplomatic conventions.
        - Categories relating to function rather than form should feature under 'Transaction type' (e.g. 'disputes' or 'post-mortem donation').

- **Short reference** (text box): this is the abbreviated reference to the edition used as the basis for data entry: example: DKAR 1:59. This abbreviated reference is the main form of ID used in predictive text boxes in the rest of the database.
    - The short reference for each edition should be looked up in this list: http://confluence.cch.kcl.ac.uk/display/MKCHEUR/Sources).

- **Editions** (text box): this lists, again in abbreviated form, all editions considered, with each new reference on a separate line. The first one listed should be the same as the 'short reference'.
    - Format: short reference + no. + page numbers, e.g. MOD 3, pp. 18-19; DKAR 1:80, p. 90; ONB 14, pp. 156-8.
    - We will not attempt to list all editions of a charter. The most recent edition should be used, and an older edition should be listed only if:
        - it provides the full text online: e.g. royal diplomas edited in MGH;
        - it is part of a printed collection which we are consulting systematically in any case (e.g. royal diplomas in Dronke's edition of the Fulda charters; original charters edited by ARTEM or ChLA; regional surveys of charters (such as *Diplomata belgica*).
    - All these references should eventually be matched with a long version giving the full bibliographical details, as on EndNote. (On the end-user interface, the user should be able simply to click on a short reference and get the full bibliographical reference.)

- a **URL** (text box) to link to an online text for the charter if it happens to be online. In this example: http://www.dmgh.de/de/fs1/object/display/bsb00000358_00097.html?sortIndex=030%3A020%3A0001%3A010%3A00%3A00

    - For multiple URLs (e.g. MGH and ARTEM), insert them all in the same box, separated by a comma and space.

OTHER INFO:

- **Authenticity** (authority list): this refers to the level of authenticity ascribed to the printed text in the edition used for the data entry, not the level of authenticity of each and every manuscript witness: i.e. it will normally reflect the editor's assessment of the text he or she arrived at, not ours.
    - There are 4 levels for 'Authenticity': 'authentic', 'suspicious', 'interpolated' and 'forged'.
        - In practice, 'forged' will essentially include single-sheet copies dated palaeographically to the period 768-900, and claiming a date between 768 and 814.
    - Even if charters include interpolated passages (or passaged identified as such by the editor), factoids derived from these should still be included within the database.

- **Textual integrity** (authority list): five possible choices:
    - Complete: nothing appears to be missing from the text.
    - Corrupted: nothing appears to be missing from the text but substantial elements of it are garbled (i.e. when a scribe wrote gibberish because he didn't understand what he was copying).
    - Extracted: passages of the text have been suppressed.
    - Summarized: the text is preserved only as an account of it.
    - Fragmentary: the text has been compromised by damage to its medium.

- **Dating system** (authority list, hierarchical, more than one choice allowed): for different kinds of dating clause (e.g. by imperial year, feast day, etc.).
    - Click here for a preliminary authority list. This does not include all dating systems: information which would be redundant with information given under 'Date point' is omitted.
    - Pick any applicable dating systems from the list on the left-hand box. Some of these will be hierarchical 'parent' dating systems: e.g. the general term 'year' is parent to sub-categories such as 'indiction year' or 'regnal year' (and the latter in turn is parent to further sub-categories such as 'regnal year: Frankish: Charlemagne', which should specify 'Charlemagne' as an associated agent).
        - When adding a new dating system (via the green + sign on the right or via 'Dating Systems' on the Mkdb admin page), always specify the hierarchical parent in the list as well as any associated agent (e.g. king for regnal year).
- Different case scenarios:
    - Charlemagne (emperor): used whenever the years of an emperor are given, irrespective of wording, i.e. including both 'anno imperii' and 'anno regni' if the latter unequivocally refers to imperial years.
    - Charlemagne (Francia): used either when dating clause explicitly refers to Francia or when dating clause includes double dates for reign,

so Francia and Italy must be meant (e.g. DKAR 1:183: "anno XXVIIII et XXV regni nostri")

    - Charlemagne (Italy): used either when dating clause explicitly refers to Italy or when dating clause includes double dates for reign, so Francia and Italy must be meant (e.g. DKAR 1:183: "anno XXVIIII et XXV regni nostri")
    - Charlemagne (king, no territory): used when dating clause does not refer explicitly to a territory (even if 'rex Francorum' appears elsewhere in the charter).
- If someone other than a king/sub-king/emperor is mentioned in a dating clause, their name and title should also be recorded as an Attribute/relationship factoid.
    - Title may be inferred: e.g. a reference to someone being in charge of a *ducatus* yields the ARF 'x is *dux*'.
    - Kings/sub-kings and emperors of any kingdom do not need ARFs when they only appear in the dating clause.
    - If the charter survives in multiple copies and they use different dating systems, include all dating information given in the text printed in the edition (this includes cases of editorial intervention; if necessary, comment in the 'Notes' box).
- If the source text gives contradictory information, this should not be amended: this section is meant to reflect the terms of reference of the charter, not the actual date, which is dealt with under 'DATE':
    - e.g. if a charter calls Charlemagne emperor but is clearly counting from 768, 'imperial years' should still be picked.

- **Features** (authority list, hierarchical, more than one choice allowed): for any formal documentary features the presence of which we think is worth highlighting, e.g.:
    - textual features (sanction clause, etc.);
    - citations (references to other texts as authority: e.g. canon or secular law, and any references to a previous charter – this will give us a list of 'ghost' charters; ignore biblical quotations);
    - archiving (any specific instructions on where the charter is to be kept).
    - See here for a preliminary authority list.
    - Pick any applicable features from the list on the left-hand box. Some of these will be 'parent' features and so shouldn't normally be picked: e.g. 'citations' includes 'citation (canon law)'.
        - When adding a new feature (via the green + sign on the right or via 'Charter Features' on the Mkdb admin page), specify the hierarchical parent whenever possible.

- **Feature notes** (text box): for any further details relating to the charter features: e.g. in the case of a citation, the exact reference (if known).
    - For multiple features, include everything in the same text box, starting each feature on a new line.
    - For those charter features which give further information on the possessions involved, further details should be included in the 'Extra info' text box under 'Associated possessions' in 'Transaction' factoids, rather than here.

- **Bibliography** (text box): for secondary literature, not editions.
    - Only record bibliographic information that the edition we are using does not discuss and which directly affects our decisions on data entry.
    - When citing works in boxes for further information on charters, agents, factoids or places, these should be entered only with surname, year of publication, e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant 'Notes', 'Further description' etc text boxes.
    - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

- **Notes** (text box): this is for comments about the charter as a whole and intended for the final website, e.g. contextualising the charter, signalling disagreement on authenticity, any particularly important arguments based on it, etc., with bibliographical references.
    - Notes on the dating of the charter should go under 'Dating notes', on its features under 'Feature notes', and on associated places/agents in the relevant 'Extra info' box.
    - Any notes intended for internal consumption only (e.g. flagging up issues / things to follow up on) should be put in the 'internal notes' box on the Administration page.

- **Associated charters** (authority list, flat, multiple entries allowed): for flagging up any related charters.

DATES (generic info):

- **Date incomplete or lacking** (tick-box): for when a charter has some dating information, but not exhaustive enough to allow a precise dating (or if it has no dating information at all, but for one reason or another is still being included in the database). This will allow users to discount from their search any charters without an exact date.

- **Dating notes** (text box): signal here any debate / comment over dating with bibliographical references.
    - If the dating clause seems worth it, include the Latin text here.
    - Bibliographical references should be given in abbreviated form (i.e. Surname (Year), pp. 000-000), with full information to be forwarded on to whomever is maintaining the bibliography.
    - All bibliographical references listed under 'dating' should also appear in the 'bibliography' text box under 'OTHER INFO'.

CHARTER DATES (specific):

What we are recording here is the date and the certainty given by the editor of the edition we are using: we are not trying to second-guess their decisions (e.g. by checking for ourselves whether indictions match regnal years).

Additional lines for all the information in this section can be created, so that several different possible dates (or date-ranges) can be given for the same charter. This allows the charter, if opinion on date is divided, to come up under different possible chronologically limited searches.
If more than four possible date options are given by the editor, this should be translated into a broader date range, to avoid excessive multiplication of date points.
The information entered here is automatically imported into all factoids linked to the same source charter.

- **From/to** (authority list): four options here: 'from', 'to', 'exact date' and 'circa':
    - To give the charter a date-range rather than as single point in time, pick 'from' on one line to identify that the following date is the *terminus post quem*, and 'to' on another line for the *terminus ante quem*.
        - E.g. a charter from November 812 is entered as 'From' 1 November 812 'To' 30 November 812.
        - If only the *terminus post quem* or the *terminus ante quem* is known, simply enter it on one line as 'from' or 'to', as the case may be.
    - If the charter has an exact date (day, month, year), pick 'exact date'.
    - 'Circa' can also be used here for a single date, though it should ideally be avoided and a range given wherever possible.
        - For the continuity project, it is suggested that the 'circa' label be replaced by a date range of perhaps 5 years on either side of the estimated date.
    - Recording imprecise dates:
        - 'end' and 'beginning' are defined as the last / first 25 years of the century in question: e.g. record 'end of the eighth century' as 775-799, 'beginning of the ninth century' as 800-824.
        - Record 'middle of the eleventh century' as 'ca 1050',
        - Record '1st / 2nd / 3rd third of the eleventh century' as 1000-1033, 1034-1066, 1067-1099.
        - Record 'twelfth century' as 1100-1199.
        - Record 'about 860' as 855-865.

- **Date** (authority list): start typing any part of the date to see if the same date has already been entered in the system (e.g. '15 November 812' will come up if you type either '15', 'Nov' or '812').
    - If the date has not yet been entered, create a new one by clicking the green '+' sign next to the date ID box: this will bring up a data entry form with day / weekday / month (authority lists), and year (free text box).
        - Fields must not be left blank, apart from weekdays.
        - Weekdays should be given only if indicated in the source text.

- **Date certainty** (authority list): <u>this applies to the degree of certainty of the statement entered in the date fields, *not* to its degree of precision</u>. If end users want to eliminate charters with a very wide date-range, they should be able to do so by excluding from their search any charters with a range of (say) more than one, two, or however many months or years, which will leave it up to users to decide what 'precise' means. The degree of certainty reflects the editor's judgement, unless it is blatantly wrong.

- So even a wide date-range (e.g. from 800 to 814, if the only dating information present in the charter is a reference to Charlemagne as emperor) can be qualified as 'certain'. The same goes for a reference to a known abbot whose dates of office are known.
- Dating relying on external information (e.g. date of office of an abbot) is admissible as 'certain' as long as the date-range is known securely. On the other hand, if we can only date a charter by means of a vague sense of *floruit* for one of the agents involved, that is obviously going to be 'conjectural'.
- There are 3 categories for 'Date certainty':
  - Certain: the statement has adequate support, and nothing contradictory is known.
  - Probable: the statement offers contradictions admitting multiple possible solutions (example: mismatch between regnal year and indiction year): this class applies to the solution(s) we find most persuasive.
  - Conjectural: the statement is based on less securely datable features or educated guesswork (for example: use of particular formulae / diplomatic features; original charter given ballpark dating according to script; dating based on a vague sense of *floruit* for one of the agents involved), and/or offers contradictions admitting multiple possible solutions (in which case this class applies to less persuasive solutions).
- In the case of a date-range, different levels of certainty can be assigned to the *terminus post quem* and the *terminus ante quem* if applicable.

- **Order number** (text box): this must be used in the case of multiple possible date-ranges, so that each set of 'from' and 'to' dates can be linked together.
  - For example, if a charter can be dated either to 15 November 812 to 20 January 813, or to 15 October 812 to 20 February 813:
    - '15 November 812' and '20 January 813' should be given the same order number (say 1);
    - '15 October 812' and '20 February 813' another order number (2).

- **Dating notes** (text box): use 'Dating notes' under 'Dates – general'.

ASSOCIATED AGENTS:

This is for listing <u>any agents whose role relates solely to the production of the charter</u>, as opposed to the transaction(s) included in it (this means we can avoid, in cases where the charter is subdivided into several transactions, having to enter this information again for every transaction factoid).

- Agents to be entered under the 'charter' main model will include, for instance, the scribe and witnesses. NB in cases of vague groups recorded as present, only create an Anonymous Agent group if this actually adds something to our understanding ('in public' or 'in front of the whole clergy of that church', e.g., counts as boilerplate).

- Agents who should *not* be entered under the 'charter' main model: any agents taking an active role in the transaction itself, such as granters or beneficiaries (or transaction-specific witnesses, in the rare eventuality that two separate lists are given). These should be entered under the 'transaction factoid' main model.

NB the role of Witness is restricted to those agents that have no other role in the charter. A Scribe also acting as Recognitor will still get recorded in both roles, but a Scribe also acting as Witness will be recorded only as a Scribe.

- **Agent** (authority list): link to an existing agent (either by typing the first letters of the modern name or using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): for the spelling of the name given in the text. This should reflect the exact wording of the text (i.e. it should not be changed to the nominative as default).
    - This needs to be done here, because this is the only way to link a particular name spelling to a particular charter source (unlike in the 'Agent' main model, which is not itself directly linked to a charter reference).
    - In cases of multiple different spellings for the same name, enter them all in the same text box, separated by a semi-colon. This will make it possible for users working from a particular charter to search for and find the standardised name used in the database using whatever spelling for it they find in their source, so they can then use it to find any other charters relating to the same Agent.
        - Include additions / interpolations provided by the editor in square brackets, e.g. if a name is incomplete because of a hole in the parchment and the edition thus reads 'Signum Seff(on)is', the original text should read 'Seff[on]is'.
        - If we need to add material ourselves, use angle brackets.
        - If we need to omit material, use ellipsis. (...)
        - e caudata is entered as ae.
        - Upper/lower case and u/v i/j uu/w remain as editor input them in the edition (even if they indicate that the manuscripts have something different).
    - Name variants only need to be entered in one of the factoids created (i.e. if the same person appears both in a transaction factoid and an ARF, the spelling of the name only needs to be recorded once).

- **Role – Agent** (authority list, hierarchical): e.g. scribe.
    - Click here for a preliminary authority list.
    - If the same agent exercises multiple roles within the same charter, add a separate 'Associated agent' line for each role.

- **Extra info** (text box): any further comments intended for the final website. All bibliographical references to be included in the 'bibliography' text box under 'OTHER INFO'.

- **Order number** (text box): do not use.

ASSOCIATED PLACES:

This is to record the place where the charter was issued, witnessed, archived, etc, as opposed to places relating to the object of the transaction. Record ‘Location of Redaction’ here; repeat that place if warranted as ‘Location of Transaction’ within all relevant Transaction Factoids.

Location of redaction: include here any location given in Actum clauses etc. Most charters will not distinguish between location of redaction and location of transaction; in those cases, enter the same location in both the ‘Charter’ main model and the ‘Transaction’ factoids (obviously only those that are primary information).

Relationships between different places are expressed under the ‘Place relationship’ factoid created for this very purpose. In practice, this means that <u>only the most precise location information given in the charter need be entered here</u>, and wider territorial references, such as pagus or marca, can normally be omitted.

- For example: if vicus X is the place where the charter was issued, and it is also said to be situated in pagus Y and next to vicus Z, the only place that needs to be listed here is vicus X. The information that vicus X is ‘in’ pagus Y and ‘next to’ vicus Z should be entered as a place relationship factoid. (The charter will still come up under searches for charters issued in pagus Y.)

- **Place** (authority list, hierarchical): link to an existing place (either by typing any letters of the place name, medieval or modern, or using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): for the spelling of the place name given in the text. This should reflect the exact wording of the text (i.e. it should not be changed to the nominative as default).
    - This needs to be done here, because this is the only way to link a particular place-name spelling to a particular charter (since the ‘Place’ main model is not itself directly linked to a single source charter).
    - In cases of multiple different spellings for the same name, enter them all in the same text box, separated by a semi-colon. This will make it possible for users working from a particular charter to search for and find the standardised name used in the database using whatever spelling for it they find in their source, so they can then use it to find any other charters relating to the same Place.
    - Name variants only need to be entered in one of the factoids created (i.e. if the same place appears both in a transaction factoid and an ARF, the spelling of the name only needs to be recorded once).

- **Role – Place** (authority list, hierarchical): e.g. ‘location of transaction’.
    - This includes the earliest known archival repository, if known (e.g. so that Folcwin documents can be linked with St Gall).
    - See here for a preliminary authority list.

- **Place descriptor** (authority list, hierarchical, more than one choice allowed): this lists the place descriptors used to refer to the Place: e.g. villa, vicus, civitas, etc. It is possible for a charter to refer to the same place through more than one descriptor, so multiple ones can be selected from the list.

    - The terms selected for this box during data entry should always be in Latin, in the nominative singular. We have opted not to use any broader parent categories in English (e.g. ‘landmarks’, ‘settlements’), but this may be a possibility for the future.

- **Extra info** (text box): any further comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box under ‘OTHER INFO’.

- **Order number** (text box): do not use.

CHARTER TRANSMISSION:

See the Confluence page for details of main cartularies: https://confluence.dighum.kcl.ac.uk/display/MKCHEUR/Descriptions+of+Cartularies

- **Transmission** (authority list): e.g. ‘Original’ or ‘Cartulary copy’. This is not the place to comment on the authenticity of the text or otherwise: at this level we are describing any known copies as physical object(s) rather than assessing the text. (Assessments of authenticity should be dealt with under the ‘Authenticity’ authority list above, and should relate to the printed text used as the basis for data entry.)
    - Five categories to choose from:
        - ‘original’;
        - ‘single-sheet copy’ (= pseudo-original);
        - ‘cartulary copy’;
        - ‘quoted in a later document’;
        - ‘book copy’ (for any charters copied into bound manuscripts that are not cartularies);
        - ‘early modern copy’ (include only if the early modern copy is the earliest extant witness).

- Transmission – From year / Transmission – To year (text boxes): date-range for each copy listed.
    - E.g. a cartulary copy dated to the first quarter of the 12th c. should be expressed as ‘from 1100 to 1124’ (a century is expressed as 800-899).
    - ‘ca 1150’ should be recorded as ‘1145-1155’.
    - Sometimes, of course, we’ll have a more precise date; if the copy is dated to the year, enter the year in both boxes.

- **Main witness used in edition** (tick-box): this allows us to distinguish between main witnesses and other copies.

- **Current repository** (authority list): the current repository of the source charter: e.g. ‘Paris, Archives nationales’. This is to help distinguish between different copies listed, and also so that users can call up all charters held in a particular repository in case they are planning a visit.
    - We agreed that tracking down the exact reference or shelfmark, especially in the case of very old editions, would be very time-consuming without adding in any way to the database’s overall performance as a tool of analysis.

- Format for entries: City [in English form] + comma + Archive name [local, may include name of city in local language]: e.g. Munich, Bayerisches Hauptstaatsarchiv München.

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II: MAIN MODELS (non-factoid):

Non-factoid main models include Agent; Place; and Object. These three main models are free-standing, in the sense that they are not inherently attached to a source charter. They can then be put into play as part of a specific statement, and linked to a specific source reference, via factoids (section III).

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IIA: AGENT (main model):

This includes all persons (named and anonymous, individuals and groups) and religious institutions (churches, monasteries, etc.). The only persons for whom an 'Agent' entry should not be created are those whose existence is merely surmised rather than documented by the text (e.g. in appurtenances list, in statements such as 'the villa of X with all its dependants': simply note these under 'Appurtenances' in the 'Associated possessions' section in 'Transaction factoids').

Apply extreme conservatism in identifying two names in different charters as referring to the same person. In doubt, always create a new agent: it's easier to merge them later down the line than it is to separate them out. If a named agent appears with the same attribute/relationship in multiple charters from the same collection in a reasonably close period of time (e.g. 'Arn diaconus' appearing as a witness in a group of chronologically close charters), these agents may be considered the same person unless there is reason to question the identification.

If a charter grants a piece of land to 'Saint X and his community under Abbot Y', the relevant factoid need only be linked to the church as an institutional agent (although the monastery may need to be entered as the 'represented' recipient, and the abbot as the 'acting' recipient, depending on the language of the charter).

Alternative personal names: if agents have names of the form "A or B", e.g. "Attane siue Angilsuinda" (WBG 53), "Arioaldi qui Mencioso vocitatur" (BER 4), both names are recorded in the Name Modern Form and Name Medieval Form fields in the following format: "A / B", where A and B are the standardised names.

MAIN INFO:

- **Type** (authority list, hierarchical): this includes attributes which are sufficiently integral to the agent that it would seem unnecessary (not to mention extremely time-consuming) to link them to a specific source charter reference via an 'Agent attribute and relationship' factoid.
  - In practice, this covers:
    - sex (at the risk of coming across as conceptually atavistic, pre-Butlerian first-generation feminists);
    - institutional status (so the Agent 'St Gall' is always a monastery).
  - To be chosen from the following authority list:
    - Person: parent to: 'male', 'female', 'unknown';

        - Group of persons: parent to: ‘male’, ‘female’, ‘unknown’, ‘mixed’;
        - Institution: parent to: ‘church’, ‘monastery’, ‘xenodochium’. Each of these is parent to further categories, e.g. episcopal vs. non-episcopal church (the latter covering all *ecclesiae*, *oratoria*, *cellae*, *tituli*, etc., since these are often extremely difficult to distinguish); female vs. male monastery, etc.

- **Name – modern form** (text box): for instance ‘Charlemagne’.
    - In practice, this will usually be the same as ‘Name – standard medieval form’.
    - If no name is given, enter ‘Anonymous’ (in English, to avoid the –us/-a/-i/-ae problem).
        - ‘Anonymous’ will obviously be by far the most popular name in our database. Anonymous agents will be distinguished from each other via the automatically generated ID number (e.g. Anonymous 349), but this will not necessarily make them more recognisable when selecting them from an authority list.
        - Further identifying features can therefore be entered after ‘Anonymous’ to reduce the risk of data entry errors (e.g. for anonymous agents known because of their relationship to others, it is helpful to include identifying information in the form: ‘Anonymous (mother of Fulrad 123)’; ‘Anonymous (wife of Anonymous 234)’; ‘Anonymous (30 Slavs)’).
        - This, of course, does not constitute a substitute for entering the same identifying features as ‘Agent attribute and relationship‘ factoids, which is what will ensure they come up in a search.
            - So e.g. the fact that the anonymous beekeeper was a beekeeper should also be entered there; anonymous servi should again be entered there with the attribute ‘unfree’.
    - Biblical names e.g. Petrus, Iohannes should be modernised to equivalent King James Version (Peter, John).
    - Names of ecclesiastical institutions: use Modern place name (+ dedication if known to identify it uniquely).
        - Use the commonly used modern dedication for churches/monasteries that are still locatable (getting this from Wikipedia); leave in Latin any dedication that we can’t find.
            - Examples: Fulda; Brescia, S Salvatore; Tours, S Martin; Rome, S Peter; Lucca, S Giulia.
        - The aim is to make the Agent easily recognisable to users and absolute consistency is not required - standardised dedications are given in the Dedication field.
        - If modern place is uncertain, use most probable location. If more than one modern place is possible, use a common modern place at the regional or national level if possible.
        - If modern place is unknown, use the lowest probable modern level, e.g. France, S Maria; North Brabant, S Peter.
        - If only incomplete information is provided, enter modern name any useful information which can be used to identify the

church, e.g. ‘Unknown, S Martin’; ‘Sulzbach oratory’; ‘Unknown church (founded by Etpurc 2700)’ [‘Etpurc’ being the agent name and ‘2700’ being his agent ID for ease of reference].

- **Name – standard medieval form** (text box): the agent’s Latin name in the nominative.
    - Leave blank for institutional agents.
    - Search for the name in Nomen et Gens main search (http://131.234.121.21:8080/NeG_final/suche.jsp).
        - If the specific person is found there (dates/source match), use N&G’s standard name.
        - If the specific person is not found but a matching name is, adopt the spelling from one of its associated Agents that most closely resembles the philological lemma and / or appears to be the most common or familiar variant.
            - In case of Germanic names, leave out Latin case endings, in case of Romanic names, keep them. Examples: record ‘Aunulfus’ as ‘Aunulf’; record ‘Lupus’ as is.
            - J and I are both used and so are U/V (distinguished by sound value). W is used for UU whenever warranted.
    - If not in N&G at all, enter the nominative form of the name as given in the charter. Where a standardised spelling in nominative case cannot be established, the name will be flagged up with an added asterisk (*) at the end, e.g. Gauuentus (Gawentus? Gauventus?), Lubuciones (Lubucio? Lupucionus?). Use the separate page on Confluence to collect all proper names of this kind for potential review: http://confluence.cch.kcl.ac.uk/display/MKCHEUR/List+of+doubtful+proper+names
    - Alternative spellings will in any case appear under the ‘Original text’ box in the ‘Associated agents’ section of Charter, Transaction, Miscellaneous, and Agent attribute and relationship factoids.

- **Dedication** (authority list, more than one choice allowed): use to list saints to whom an ecclesiastical institution is dedicated.
    - Format: S or SS + English name of saint (taken from Catholic Encyclopedia). If there are multiple dedications, record them separately (e.g. a church dedicated to Saints Peter and Paul will be given separate dedications for ‘S Peter’ and ‘S Paul’).

- **Description** (text box): this is for comments intended for the final website, with bibliographical references, further information, etc.
    - Any notes intended for internal consumption only (e.g. flagging up issues / things to follow up on) should be put in the ‘internal notes’ box on the Administration page.
    - Bibliographical references to be given in abbreviation.

- **Quantity** (text box): this field is only to be used to record the number of unnamed individuals included in a group, if that group was entered as a collective agent with a single ID.
    - In the vast majority of cases agents will be entered individually, or as an unnumbered collective agent (e.g. a monastery); in either case the quantity field should be left blank.
    - In practice, this field will be used only in cases where a specific group of people is mentioned and numbered, but not enough detail is given to allow the identification of any individual member of the group even if they turned up in another document: for example, the twenty Slavs mentioned in DKAR 1:169.

- **Nomen et Gens IDs** (text box): this is to link our own Agent entries to the ID number(s) given in the *Nomen et Gens* database (in the address bar of the browser). If more than one is given, add each one on a separate line.

- **Bibliography** (text box): all references to secondary literature in the 'Notes' or 'Description' text boxes should be entered here.
    - Bibliographical references should be given using <u>Author last name + date</u>; e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant 'Notes', 'Further description' etc text boxes.
    - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

STANDARDISED ASSOCIATED PLACES:

- **Place** (authority list, hierarchical): this is only to be used for agents that stay put, and so have a particular geographical attachment that doesn't require attribution to a charter: for instance religious institutions (e.g. the agent 'Fulda' will, for the purposes of our database, always be located in the place 'Fulda').
    - Do not use for individuals or non-institutional groups.
    - Link to an existing place (either by any letters of the place name, medieval or modern, or using the lookup tool), or create a new one via the green + sign.

AGENT IDENTIFICATION:

This is to flag up the possibility that two Agents may in fact be the same person, when the identification is not secure enough to allow us to merge them without doubt.
This will allow users to filter out agent identifications according to certainty, which will allow greater transparency and flexibility. This will be especially useful for social network analysis purposes, by including or discarding links according to the level of certainty of the identification.

The link should work both ways: i.e. the possibility that the two agents are the same person should appear under both Agent entries, even if the Agent identification section is only filled in for one of them.

- **Agent** (authority list): use to enter, using the modern form of the name (either by typing the first letters of the standardised modern name or using the lookup tool), any agents who might be the same person as the Agent whose entry form is being edited.

- **Agent identification certainty** (authority list): two levels: ‘probable’ and ‘possible’.

- **Notes** (text box): any further comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

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IIB: PLACE (main model):

The database will include every named human settlement, and physical markers insofar as they can be identified (e.g. rivers, woodlands, rocks).

'Place' is a hierarchical model, so that one place can be entered as being inside a wider region, which will allow users to search for documents using modern regional divisions (e.g. Italy, but also Friuli, France, but also Brittany, Burgundy or Alsace). Even if a Place has a geolocation, a parent should still be entered.

The 'parents' in this hierarchy should be modern places exclusively: this hierarchy should *not* attempt to reflect any medieval hierarchy of places or territories, because that would require inventing an exact, definitive version of Carolingian-era territorial divisions, which could only be vastly misleading. Medieval place hierarchies should be expressed as a 'Place relationship' factoid instead, so that each statement of this kind can be linked to a particular statement given in a source charter.

- For example: the fact that the abbey of Marchiennes is in the Nord-Pas-de-Calais region of France is not under controversy and doesn't need a source reference, so enter 'Marchiennes' here as a 'Place' with the parent 'Nord-Pas-de-Calais' (and the further parent 'France').
- By contrast, the information that Marchiennes was in pagus Austrebantum needs to be entered as a 'Place relationship' factoid with proper reference to a source charter.

These wider medieval territorial divisons should nevertheless be entered as Places in their own right, in order to enable us to refer to them in a 'Place relationship' factoid.

Boundary clauses: the boundaries of a piece of land can be identified in 3 different ways:

- By reference to un-named physical features, e.g. 'the public road', 'up to the mountain slopes where Tassilo had granted them the pasture': this information is not entered in the database (though in the latter case the grant of pasture will be recorded as a secondary-information factoid).
- By reference to named physical features/places, e.g. 'as far as the river called Alm', 'between Eichel and Mitelbrunn': these named places are entered as associated places, with place role 'Reference point'. (The database therefore acts as an index to any named place in the charters.)
- By references to land owned by some other Agent, e.g. the land of X 'borders on one side on [possessions of] the lord king, on the other on Liuto', 'one end in the vineyard of the church of S. Maria [of Sesto]': for each neighbouring Agent, an Agent relationship factoid is created ('X is neighbour of Charlemagne', 'X is neighbour of Liuto', with the location at which they are neighbours given in the Associated Places. Secondary transaction factoids of the type 'Possession' for each neigbouring Agent can be created automatically by ticking the 'instantiate' box: when doing this, always enter the neighbouring Agent for which the factoid needs to be created as Person2.

Method for matching medieval and modern names:

a) Medieval settlements

- If location is known (or editor suggests only one answer), use current/nearest modern settlement as modern name with geolocation co-ordinates and parent relations referring to that. Include brief comments on any disagreements in description field
- If location is disputed (= editor suggests more than one possibility), create one Place with the medieval name and modern name 'Unknown', and as many separate Places as there are different modern identifications (the latter with geolocations). Link the 'Unknown' Place to its various identifications using the 'Place identification' section.
- If location is unknown, create unnamed modern place with parent 'Unidentified places' under the relevant region or country.

b) Rivers/Mountains/Physical features

- Do not attempt to geolocate.
- If location is known (or editor suggests only one answer), use nearest equivalent name for same feature (e.g. if specific tributary does not have modern name, use name of river, if specific peak is not named, use name for range of hills, etc).
- If location is disputed (= editor suggests more than one possibility), create separate entries for all suggested modern names, and list all them in the Associated places section of relevant Transaction factoid.
- If location is unknown, create unnamed modern place with either region or country parent (depending on degree of uncertainty).

c) Pagi and other medieval territories

- Do not attempt to geolocate.
- Use 'Medieval Territory' as parent.
- Create modern name of form 'X (territory)', where X is modern name of place from which territory takes its name e.g. 'Worms (territory)' for Wormsgau, 'Alsace (territory)' for pagus of Alisatia, 'Spoleto (territory)' for Duchy of Spoleto). (The precise term used to describe the territory is entered via Place Type).

Things with names inside bigger places (e.g. hoba named X in villa Y): create hoba as object, in place X, then PRF with X, place descriptor hoba, in Y place descriptor villa. Named villas and islands are treated as places. A named curtis (in Italy) is treated as place if the name is for the whole thing e.g. giving 'curtis X' has AP of place X, giving 'curtis in/de X' has AP of property in X. Named woods and casales are treated as ET = wood, casales etc at place name.

- **Modern name** (text box): this records the modern name corresponding to the medieval place name given under the 'Medieval place information' section below.
    - Form of modern name: for some European places there are traditional English language names which are not those used within the country: e.g. 'Rome' for 'Roma', 'Cologne'' for 'Köln'. See Wikipedia's List of English exonyms. Use these if these exist, otherwise use name in

    country's language (or language of region/canton for countries with multiple official languages).
    - For those medieval place-names which have not been identified with a modern location, simply fill in the rest of the data entry form leaving 'modern name' blank. The system will then automatically generate the modern name 'Unknown' followed by a number.
        - Entries of this kind can still be assigned a parent in the hierarchy, to distinguish between 'Unknowns' in Italy and those in Belgium, even if we don't have the precise geolocation.

- **Description** (text box): for any further comments intended for the final website. All bibliographical references to be included in the 'bibliography' text box.

- **Parent** (authority list, hierarchical): enter the modern region in which the Place is situated (e.g. modern départements for France; see attached document here).
    - Regions will in turn have modern countries as their own hierarchical parents.
    - For unknown places, enter here the most precise possible level of localisation.

- **Bibliography** (text box): all references to secondary literature in the 'Notes' or 'Description' text boxes should be entered here.
    - Bibliographical references should be given using Author last name + date; e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant 'Notes', 'Further description' etc text boxes.
    - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

MEDIEVAL PLACE INFORMATION:

- **Medieval name** (text box): this is the standardised spelling for the Latin place-name. This is taken as the headword from Orbis Latinae, if the place is listed in there.
    - If in doubt as to what the standardised spelling should be, use any of the spellings used in the original text, and flag up for later resolution by adding an asterisk at the end of the name (e.g. Bettinbah*).
    - Alternative spellings should be entered in 'Original text' boxes in factoids with Associated Places sections, so they can be attached to a particular source charter.
    - Name variants only need to be entered in one of the factoids created (i.e. if the same place appears both in a transaction factoid and an ARF, the spelling of the name only needs to be recorded once).
    - In some cases, the same place name will be used in the charter to signify different spaces: say, the palace of X in the city of X. These

should nevertheless be counted as the same Place, and distinguished via Place descriptors in the relevant factoids.
    - If several different medieval place-names were in use to refer to the same place, create separate 'Place' entries with the same modern name and geolocation.

- **Geolocation** (text box): x-coordinates/y-coordinates for GIS mapping, if the modern location has been identified.
    - Geo-coordinates should be entered in decimal degrees where possible. Geonames and Google Maps both give latitude and longitude co-ordinates in decimal degrees for selected locations. In Geonames, click on a marker on a map and a pop-up will appear giving decimal co-ordinates. (The list feature gives only co-ordinates in degrees, minutes and seconds). See also Google Maps help on finding latitude and longitude. Ensure coordinates are entered as 'x'/'y' (space on either side of the stroke optional).

PLACE IDENTIFICATION:

As in the Agent main model, this is to deal with identifications not certain enough to allow for the straight merging of data, as well as with multiple possible identifications. In practice this means this section should only be used for Places where the modern name is 'Unknown'.

- **Place2** (authority list): use to enter (either by typing the first letters or using the lookup tool) any possible modern place identifications.

- **Place identification certainty** (authority list): two levels: 'probable' and 'possible' (since if an identification were 'certain' we would simply merge the two places).

- **Notes** (text box): any further comments intended for the final website. Bibliographical references to be given in short form with page numbers, and included in the 'bibliography' text box.

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IIC: OBJECT (main model):

This model includes anything that can be an object of possession, with the exception of persons (who are always entered as Agents), churches/religious institutions (ditto), and places (a piece of land is counted as a 'Place' when the charter specifically involves a place taken as a whole, e.g. 'I give the villa X with whatever may be found there, with appurtenances', as opposed to a more circumscribed object, e.g. a vineyard or a field, which counts as an Object with a location). If the extent of the land is unspecified but we can't be sure that the transaction involves a Place in its entirety (e.g. if someone gives 'all that I possess at X', 'my things in villa Y') this should usually be taken as an Object (with entity type 'Unspecified property').

In practice, new 'Object' entries should not be entered independently (i.e. do not enter them under the Objects page of the Mkdb administrative interface): they will generally be created automatically when entering a new 'Associated possession' as part of a 'Transaction factoid', if the 'instantiate & split individual' box has been ticked. The information entered in the Transaction factoid will then be automatically imported into a newly-created 'Object' entry tied to the charter in which it appears, e.g. 'hoba (WBG 19)'.

NB the **grant of property** that is said to be fiscal/from the fisc should always be recorded in Latin terms (as *res fiscales*), whether or not this exact term is used. Less specific terms about the origins of royal property should not be recorded.

MAIN INFO:

NB these fields may be specified, but will rarely (if ever) need to be adjusted, since all pertinent object information can (and should) be filled from the associated Transaction factoid page.

- **Name** (text box): leave blank. Generated automatically from 'Entity type' + 'Charter short reference' from the original Transaction factoid.
  - If the object is given a name in the source text, add manually at the end of the line. Any spelling can be chosen; alternative spellings will appear in the 'Original text' box in the transaction factoid in any case.

- **Description** (text box): for any further comments intended for the final website. As a rule, use the transaction factoid notes box for any bibliographical references.

- **Entity type** (authority list, hierarchical, more than one choice allowed): e.g. vineyard, privilege, census... NB 'Unspecified property' should be used in all instances of generic gifts of property that cannot be said to constitute a Place (as above).

- **Dedications**: obsolete, do not fill (religious institutions, at one point sometimes entered as objects, are now always entered as agents).

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III: FACTOIDS:

Factoids connect elements from the other main models to each other (Charter, Agent, Place and Object), as well as to subsidiary authority lists (see section IV).

The 'Charter' main model constitutes the source of evidence for any factoid included in the database, and all factoids include a reference to the source charter. Only one source charter can be given per factoid. All factoids have associated dates, most (but not all) of which correspond to the source charter dates.

The types of factoid included in this database are:

A. 'Agent attribute and relationship factoids': connecting agents with particular attributes assigned to them in a source charter: e.g. title, occupation, ethnicity, legal status. This also includes relationships between agents and places (e.g. bishop of the city of X), and between agents and other agents (e.g. X father / wife / lord of Y).

B. 'Place relationship factoids': connecting places to each other: e.g. place X is in the city of Y, in the *pagus* of Z, etc. This involves the description of space and territory in an original source charter only: modern place identifications are dealt with under the 'Place' main model.

C. 'Transaction factoids': connecting agents, places and possessions to each other. This includes all information contained in a given charter relating to any kind of right, over either objects or people, capable of being transferred.

D. 'Miscellaneous factoids': this connects agents and places. This category covers any further information which seems worth including in the database, but which is not reducible to the data entry form specifically devised for 'Transaction factoids'.

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IIIA: AGENT ATTRIBUTE AND RELATIONSHIP FACTOIDS (main model):

This links agents with any characteristic attributed to them in a charter source: for instance title, occupation, ethnicity, legal status (but not sex, which is included under the 'Agent' main model).

- 'Attribute' covers information which applies to the agent irrespective of their particular role in the charter: this is what distinguishes it from 'Agent role' (in practice, the two can be tricky to distinguish: e.g. 'scribe' is a role carried out by the writer of a particular charter, 'notary' is an attribute a charter assigns to someone).

Attribute factoids reflect information explicitly given in a charter. No inferences can be made nor further information supplied that is not directly included in the source: e.g. if an agent is the object of a transaction, this cannot be counted as evidence regarding the agent's legal status unless it is explicitly stated.

- To give the example of DKAR 1:169: the beekeeper should be identified as an 'Anonymous' Agent, with the attribute 'beekeeper', under the hierarchical parent 'occupation'; his legal status is not commented on in the text and so should not be assumed to be unfree.

The same goes for other fundamental social divides – e.g. lay or religious: although it would seem reasonable to assume that any agent would be either one or the other, we should only record this as an attribute when there is explicit evidence in either direction in a source charter.

This model also includes relationships between agents: for instance a family or lordship link.

- Using the same model to record both attributes and relationships eliminates the problem of what counts as an attribute and what as a relationship, particularly in view of the fact that a title often also highlights a relationship (e.g. an unfree person isn't just unfree, they are in a relationship of unfree dependence to their lord; an abbot isn't just an abbot, but the abbot of a particular monastery (i.e. another agent); a *missus* isn't just a *missus*, but someone's *missus* in particular, etc).
- It also means we can include in one place the information that X is a priest (as a status marker e.g. in a witness list, which wouldn't necessarily make clear what church he was attached to), and the information that X is a priest of church Y (or when someone is designated as unfree but it's not clear who the lord is).

NB a family relationship must be input as it is explicitly stated in a charter: e.g. if granter X states that he received land as an inheritance from his *genitor* Y, a relationship of 'Y is father of X' is entered (as opposed to 'X is son of Y'), because a Latin term for 'father' has been given. In the future, a continuity project might look into the possibility of automatically generating inverse relationships for such attribute/relationship factoids.

Some boundary clauses refer to land owned by a neighbouring Agent, e.g. the land of X 'borders on one side on [possessions of] the lord king, on the other on Liuto', 'one end in the vineyard of the church of S. Maria [of Sesto]': for each neighbouring Agent, an Agent relationship factoid is created ('X is neighbour of Charlemagne', 'X is neighbour of Liuto', with the location at which they are neighbours given in the Associated Possessions. Secondary transaction factoids of the type 'Possession' for each neighbouring Agent can be created automatically by ticking the 'instantiate' box: <u>when doing this, always enter the neighbouring Agent for which the factoid needs to be created as Person2</u>.

More than one attribute may be given within the same factoid, as long as all relate to the same person(s) and no ambiguity is created. E.g. the same factoid can contain the information that X can be a monk and a priest; but X cannot be a priest and someone's neighbour in an associated place (otherwise the database would relate the Associated place to both pieces of information). For example, the following may be combined into a single attribute and relationship factoid:

1) Two attributes of same form for one agent with no Associated Places: e.g. "Charlemagne is king of the Franks" and "Charlemagne is king of the Lombards"
2) Two associated places relating to the same agents: A is neighbour of B at place X; A is also neighbour of B at place Y (e.g. BUN 27)
3) Neighbours of two agents acting together: A is neighbour of B and C at place X (e.g. BER 5, where the brothers Audoald and Audulf jointly sell some land)

The following, however, may <u>not</u> be combined:

4) Two attributes for one agent with Associated Place for one only: e.g. A is a priest, A is from place X
5) An attribute and relationship for one agent, with Associated Place for one only: e.g. BER 4: Wincausus is son of Rodonus, Wincausus is from Cassenatello.

MAIN INFO:

- **Factoid title** (text box): leave blank. Automatically generated out of: 'Person 1' (modern Agent name) + automatically generated 'Agent ID' (to help distinguish between different agents of the same name) + 'Attribute/relationship type' and, if any of the following are entered: 'Person 2' + 'Agent ID'; 'Associated place' (medieval Place name).

- **From Charter** (authority list): the short reference to the source charter; type in the first few letters to bring up the available list.

- **Further description** (text box): for any further comments intended for the final website. All bibliographical references to be included in the 'Bibliography' text box.

- **Bibliography** (text box): all references to secondary literature in the 'Notes' text box should be entered here.
    - Bibliographical references should be given using <u>Author last name + date</u>; e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant 'Notes', 'Further description' etc text boxes.

  - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

DATES:

These work exactly as in the 'Charter' main model. The date(s) given for the source in the 'Charter' main model are automatically imported into any factoids derived from it, though they can be modified. <u>In the case of attributes and relationship factoids, however, these default charter dates should be left as they are</u>, since what is being dated here is the *act* of attributing a title or a relationship to an agent: that is, it will always be contemporary with our source text, rather than necessarily with the agent being described.

- So a statement relating to a Merovingian king in a confirmation, for instance, would be given the date of the Carolingian charter in which he is being mentioned (on the understanding that the manner in which an agent is represented in a document will often reflect the situation at the time of writing more than the reality of the agent's own time).

Person to person relationships:

Not all of these fields will need to be filled in: Person 1 and Attribute/relationship type always need filling in, but Person 2 and/or Associated places can be left blank. For example:

- The statement 'X is a bishop' should be entered as: Person 1 = 'X', Attribute / relationship type = 'Bishop'. Person 2 and Associated places are left blank.
- The statement 'X is the bishop of Y' should be entered as: Person 1 = 'X', Attribute / relationship type = 'Bishop', and Associated places = 'Y'. Person 2 is left blank.
- The statement 'X is the father of Y' should be entered as: Person 1 = 'X', Attribute / relationship type = 'father of', and Person 2 = 'Y'. Associated places is left blank.
- The statement 'X is the abbot of monastery Y' should be entered as: Person 1 = 'X', Attribute / relationship type = 'abbot', and Person 2= 'monastery Y'. Associated places is left blank.
- The statement 'X is a Bavarian' should be entered as: Person 1 = 'X', Attribute / relationship type = 'Bavarian'. Person 2 and Associated places are left blank.
- The statement 'X is the duke of the Bavarians' should be entered as: Person 1 = 'X', Attribute / relationship type = 'duke of the Bavarians'. Person 2 and Associated places are left blank.
- The statement 'X is the king of the Franks and Lombards' should be entered as 2 separate factoids:
  1. Person 1 = 'X', Attribute / relationship type = 'king of the Franks'.
  2. Person 1 = 'X', Attribute / relationship type = 'king of the Lombards'. In both factoids, Person 2 and Associated places are left blank.

Unfree people: ‘unfree’ is treated exclusively as an attribute, not a relationship. The relationship element (e.g. A is unfree of B) should be treated as a secondary transaction factoid of possession, with the unfree person as ‘held’.

- **Person 1** (authority list): this identifies the agent to whom the statement applies, using the agent’s ‘Name – modern form’.
    - Link to an existing agent (either by typing the first letters of the modern name or by using the lookup tool), or create a new one via the green + sign.

- **Attribute/relationship type** (authority list, hierarchical): the attribute or relationship ascribed to Person 1. This list should consist of English terms as much as possible; the exact Latin terminology will feature in the ‘Standardised Latin’ field below.
    - In cases where a Latin term may denote two or more different attributes (or relationships), the most probable meaning is recorded (via an ART in English), while the alternative meaning gets a mention in the extra info box.
        - NB for ‘nepos’, choose the most appropriate of the following three attribute/relationship type in each instances: ‘nephew’, ‘grandson’, or ‘nephew/grandson’ when no indication is given as to which one is meant. ‘Relative’ may also be used if there is reason to believe that neither ‘nephew’ or ‘grandson’ is appropriate.

- **Person 2** (authority list): only fill this in if the statement expresses a relationship from person to person, using the agent’s ‘Name – modern form’.
    - In the case of titles, for example ‘dux Baiwariorum’: the full title counts as a personal attribute of the dux, so ‘duke of the Bavarians’ should be the entry in the authority list, with the hierarchical parent ‘duke’.

- **Original text** (text box): this is used for entering the relevant Latin text (e.g. ‘Rachiprandus presbiter’). The Original Text field under Person to Person relationships is used only to record spellings of names of people/places that are not otherwise recorded for this charter (e.g. do not already appear in the Transaction factoid).

- **Latin terms** (authority list, more than one choice allowed): the exact Latin term used in the text, in nominative singular form.
    - Standard spelling to be taken from: Lewis & Short : http://www.perseus.tufts.edu/hopper/text?doc=Perseus%3Atext%3A1999.04.0059%3Aalphabetic+letter%3DA ;
    - or failing that, the Niermeyer first edition: http://archive.org/details/MedievalLatinLexicon

- **Extra info** (text box): for any further comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

ASSOCIATED PLACES:

- **Place** (authority list, hierarchical): link to an existing place (either by typing in any letters of the place name, medieval or modern, or using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): The Original Text field in Associated Place is not used (to avoid duplication with the original text box under 'person to person relationships').

- **Role – Place** (authority list, hierarchical): e.g. 'location over which authority is held'.

- **Place descriptor** (authority list, hierarchical, more than one choice allowed): this lists the place descriptors used to refer to the place: e.g. villa, vicus, pagus etc. It is possible for a charter to refer to the same place through more than one descriptor, so multiple ones can be selected from the list.
    - The lowest level in the hierarchy (i.e. the only level from which terms should be selected for this box during data entry) should be the Latin term in the nominative singular. These should then be grouped under parent categories, which should be in English.

- **Extra info** (text box): for any further comments intended for the final website. All bibliographical references to be included in the 'bibliography' text box.

- **Order number** (text box): do not use.

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IIIB: PLACE RELATIONSHIP FACTOIDS (main model):

This factoid connects medieval places to one another: e.g. locus X is in the city of Y, in the pagus of Z, etc. A continuity project should look into the possibility of the database automatically deducing the inverse relationship: e.g. the city of Y contains locus X.

The aim of this factoid is to allow users to call up all charters related to a particular medieval territorial division (e.g. a particular pagus).

It will also allow the visualisation of such territories via the mapping tool, by bringing up as dots on the map every location identified in a source charter as being in pagus X (using the geolocation assigned to each of these locations in the 'Place' main model).

This model is dedicated to representing the representation of space and territory in our source charters, so this factoid should not include *any* relationships involving modern geographical units: the latter should be expressed through the hierarchy under the 'Place' main model instead.

The smallest and most precise possible geographical reference-point, given as Place1, should remain the anchor point for all subsequent statements in cases where more than one geographical relationship is given in the charter. For example: if a charter mentions 'locus X on villa Y in pagus Z', the factoid should be entered as follows:

- 'locus X' (Place1) is 'in' (GeoRelation) 'villa Y' (Place2);
- 'locus X' is 'in' 'pagus Z'.
- What we will *not* do is assume that villa Y is therefore necessarily in pagus Z.

This may seem like a counter-intuitive decision in this simple example, but in more complex cases it would be highly problematic to assume any regular hierarchy or interlocking of territories. A string of location information will not always be presented in an order reflecting increasing hierarchical progression, so even working out which territory was inside which would require us to make at least two highly questionable assumptions. It would mean:

a) having to assume that we in fact know which kind of territorial division constituted a larger unit than another, and was therefore capable of containing it (this is especially problematic for terms like 'marca', which could be used to refer to areas on very different scales); and
b) assigning to the statement given in the charter a more general value than it may have been intended to have: we would effectively be reading the charter as saying that *all* of territory X was included in the larger territory Y, whereas in fact the charter may simply be saying that the relevant part of territory X was also in territory Y, without implying any kind of systematic overlap.

The crucial advantage of this method is that it removes any need to invent fictional boundaries for any pagus or other territorial division: the area covered by a particular territory, and the level to which it might have interlocked or overlapped with other territorial divisions, will emerge as a result of the project rather than being simply assumed.

Things with names inside bigger places (e.g. a *hoba* named X in *villa* Y): create *hoba* as object, in place X, then PRF with X, place descriptor *hoba*, in Y, place descriptor *villa*. Enter the same geo-coordinates for both.
Named villas and islands are treated as places.
A named *curtis* (in Italy) is treated as a place if the name is for the whole thing: e.g. a gift of '*curtis* X' has an Associated Possession 'Place X', whereas a gift of a '*curtis* in/de X' has the AP 'property' in location of possession X.
Named woods and *casales* are treated as ET = wood, casales etc at place name. Named meadows/fields etc are to be recorded as ET ="field" at place X. If necessary, PRFs should be used to indicate relationships to any larger unit e.g. "field called X in villa called Y" is recorded as X/place description "field" is in Y/place description "villa".

MAIN INFO:

- **Factoid title** (text box): leave blank. Automatically generated out of 'Place1' + 'GeoRelation' + 'Place2'. The medieval Place name is to be used for this, to help recognising it in a list.

- **From Charter** (authority list): the short reference to the source charter; type in the first few letters to bring up the available list.

- **Further description** (text box): for any further comments intended for the final website. All bibliographical references to be included in the 'bibliography' text box.

- **Bibliography** (text box): all references to secondary literature in the 'Notes' text box should be entered here.
    - Bibliographical references should be given using Author last name + date; e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant 'Notes', 'Further description' etc text boxes.
    - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

DATES:

These work exactly as in the 'Charter' main model. The date(s) given for the source in the 'Charter' main model are automatically imported into any factoids derived from it, and in this particular factoid will obviously not require modification.

PLACE TO PLACE RELATIONSHIPS:

- **Place1** (authority list, hierarchical): this should always correspond to the smallest possible geographical reference point involved in the factoid: e.g. a city, villa, or vicus.
    - All wider territorial units mentioned should be entered as 'Place2'.

  - Link to an existing place (either by typing in any letters of the place name, medieval or modern, or using the lookup tool), or create a new one via the green + sign.

- **Place descriptor** (authority list, hierarchical, more than one choice allowed): this lists the place descriptors used to refer to Place1: e.g. villa, vicus, etc. It is possible for a charter to refer to the same place through more than one descriptor, so multiple ones can be selected from the list.
  - The lowest level in the hierarchy (i.e. the only level from which terms should be selected for this box during data entry) should be the Latin term in the nominative singular. These should then be grouped under parent categories, which should be in English.
  - Place descriptors include spatial terms like 'inside', 'outside', or 'in public', which will be read as applying to any other term chosen.

- **Place2** (authority list, hierarchical): enter a place with a relationship to Place1 (<u>the wider territorial unit should always be included as Place2</u>).
  - Link to an existing place (either by typing in any letters of the place name, medieval or modern, or using the lookup tool), or create a new one via the green + sign.

- **Place descriptor** (authority list, hierarchical, more than one choice allowed): this lists the place descriptors used to refer to Place2: e.g. pagus, marca, etc. It is possible for a charter to refer to the same place through more than one descriptor, so multiple ones can be selected from the list.
  - The lowest level in the hierarchy (i.e. the only level from which terms should be selected for this box during data entry) should be the Latin term in the nominative singular. These should then be grouped under parent categories, which should be in English.
  - Place descriptors include spatial terms like 'inside', 'outside', or 'in public', which will be read as applying to any other term chosen.

- **GeoRelation** (authority list): this defines the relationship between Place1 and Place2: in practice this will only be 'in' or 'on'. If a place is only said to be 'near' another, it should simply be listed in the Transaction factoid main model with the role 'reference-point'.

- **Original text** (text box): for the original Latin text.

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IIIC: TRANSACTION FACTOIDS (main model):

This includes all information contained in a given source charter and relating to any kind of right, over either objects or people, capable of being transferred (e.g. rights of ownership, but not, say, rights over someone as a father or husband, or of a bishop over his diocese).

A single charter can contain what we will treat as several distinct transactions. A transaction factoid is defined as a factoid where:

- the granter (or group of granters acting as one party, e.g. a married couple) doesn't change;
- the recipient (or group of recipients acting as one) doesn't change;
- the transaction type doesn't change.

For example:

- X donates a piece of land and a cow to Y = one single transaction;
- X donates a piece of land to Y and sells the cow to Y = two transactions.

<u>The only exceptions to this rule are transactions recording reciprocal arrangements</u>: exchanges, leases of land in return for a census, sales, loans against a security or interest. These should be entered as a single factoid, and the flow of goods in either direction highlighted by ticking the 'Return' box under 'Associated possession' (see below for details). Precariae, on the other hand, are always entered as two separate transaction factoids.

In the case of <u>**disputes**</u>, any claims made by the various agents involved, as well as the final outcome, should all be entered as separate factoids. They should be distinguished via the 'Transaction type' ('dispute – claims': secondary-information factoids; and 'dispute – outcome': primary-information factoids).
Disputes are among the most complex of transactions to input into factoids. The following procedure aims to summarise enough to provide basic information, while encouraging the more enthusiastic user to read the charter text for themselves:

- Input one primary information transaction factoid of transaction type 'Dispute'. In the Associated Agents section list all the litigants (those claiming the possessions in the dispute). Group these together as necessary e.g. if two people or a bishop supported by his clerics are jointly claiming some possessions they will all be recorded with Agent Role of 'Litigant 1' or 'Litigant 2' etc. Other agents who are playing some role in the procedure of the dispute, e.g. judicial authorities and dispute witnesses should also be recorded here.
  - In Associated Places, the location(s) of the dispute should be recorded (under location of transaction), and the locations of all the possessions under dispute.
  - In Associated Possessions, all the possessions under dispute are listed, with Kind of Possession given as 'Held object'. There is no attempt made in this factoid to indicate who currently holds any particular AP, since it is often not clear.
- Input a number of secondary information transaction factoids which record claims by the litigants to the possessions. Include positive claims only, e.g. that X gave Possession Y to Litigant 1, that Litigant 2 has held Possession Z for 30 years, etc. (We do not record statements such as 'Litigant 2 unjustly

removed Possession Y from Litigant 1'). Use the Transaction Types 'Alleged donation', 'Alleged lease', 'Alleged possession' etc as appropriate, and enter Associated Agents, Places and Possessions in the normal way.

- All claims are recorded in this way, however implausible: we are not attempting to determine the 'truth' of the dispute.
    - If we know the outcome of the dispute (whether or not it is the final outcome) input one or more primary information transaction factoids recording this. These outcomes are treated as arrangements made between the litigants, not as imposed on them by judicial authorities, e.g. the statement 'X decreed that Y should give the field to Z' is recorded as 'Y gave the field to Z'. X's involvement will already have been recorded in the initial dispute factoid, so does not need to be repeated here.
- Use the Transaction Types 'Grant (Dispute outcome)', 'Possession (Dispute outcome)' etc, according to the charter's explicit statements. If it is not stated that a possession is being transferred between the litigants, simply record as 'Possession (Dispute outcome)'; treat anything referred to as a 'restoration' simply as a Grant.
- Enter Associated Agents, Places and Possessions in the normal way.
- If the dispute is continued in another charter, the relevant charters can be linked together via the Associated Charters field in the Charters model.

Entering disputes where only partial information is known:
The full details of a dispute involving some APs requires knowing

A) the litigants on both sides,
B) the judicial authorities involved and
C) the result.

If we know the full details, these should be entered in the normal form of 2 TFs: Dispute/Dispute Outcome (plus any additional secondary factoids about alleged previous transactions). In some cases, however, less information is known.

1) If we only know the litigants on one side, these can be input as Litigant 1 without any Litigant 2 (see e.g. DKAR 1:146 where Hildeprand has settled a dispute over St Michael Rieti between Sinwald and someone).

2) If the judicial authorities are known, a Dispute factoid should always be created included their details and that of any known Litigants. A separate Dispute Outcome factoid (of type Possession/Grant etc.) should also be created if we know the result.

3) If the litigants sort out the matter between themselves without any judicial authorities mentioned as being involved (but it's still recorded that there's been a dispute), then there's no need for a separate dispute factoid: just use a Dispute Outcome factoid of the appropriate type: see e.g. WBG 197, MON 10.2).

4) If the outcome isn't specifically reported in the charter, a Dispute TF can be created without a Dispute Outcome TF (see e.g. DKAR 1:146). This involves inputting details of Litigants and Judicial Authorities as well as APs under dispute.

Agreements – settlements negotiated between two or more parties which do not involve a judge/dispute settler/mediator etc are recorded as follows:

(1) A TF of type Agreement, which records the parties involved on each side, e.g. if A and B jointly make an agreement with C, this would be recorded as A = Party 1, B= Party 1, C= Party 2. This TF does not include any APs and only the Place of transaction is given (if known).

(2) One or more TFs of type Agreement Outcome, which record what APs each party ends by granting or possessing. These will have Agent Roles of Holder/Granter/Recipient etc. as required and full details of the APs are given as normal.

A confirmation of the whole of a previous agreement should be recorded as TT Confirmation of Agreement, recording the parties on both sides and also the details of the confirmer, any new details of Place of transaction, date, additional consenters, beneficiaries etc, but not the APs.

The vast majority of Transaction factoids will involve possessions changing hands as a result of the action described in the charter (hence the name). Such factoids will be highlighted as 'primary information' in the 'Information status' field. However, this model is also intended to include additional information on possessions that are not being transferred in the charter, and are not its primary object (these will be highlighted as 'secondary information' in the 'Information status' field, so users will be able to discount these results from their searches). For example, Transaction factoids will also include:

- a factoid relating to a previous owner of the possession in question;
- agents owning neighbouring lands, if this information is included in the charter;
- or (e.g. in the case of a confirmation) details of a previous grant. In all such cases the same source charter is given as the basis for the information. The database will not include 'ghost' charters as separate source entities (i.e., charters which do not survive, but the content of which can be guessed from later references in surviving charters included in our collection).
- A relic counts as an object; if mentioned as being in the possession of an Agent (e.g. if swearing on relics), it should be entered in a secondary information factoid.

Note: the unit of measure 'part' should be used for cases where it is useful to show that an Associated Possession (object or agent) has been divided up, but the exact fraction is not known. 'Part' is to be used for 'portio', 'pars', etc.

Note: references to land which is transferred often mention people who are/have been on the land, often in very unspecific ways:

- e.g. WBG 22 (29 May 798) has Otbert donating to Wissembourg a hoba in Gazfeld 'quam Ruadgerus habet'; WBG 24 (5 May 798) has Hiltolf and Thiotbert donating to Wissembourg their property in Dauendorf, 1 named servus and ‘quicquid Engildrud habuit de medietate in ipsa marca’; WBG 42 donates a hoba ‘quae fuit Uuolfen’.

- In these cases, as well as the main transaction factoid, a secondary transaction factoid should be entered, type ‘Possession’, with the same Object in the AP as the primary information factoid.
- No terms and conditions should be given unless they are explicitly stated: we cannot presume that these are either tenants or owners depending on the particular verbs/tenses used.
- The data for the factoid should be changed to ‘To + date of the charter’. If the date of the charter is not known precisely, the date should be changed to ‘To + latest possible date of charter’. The agent role should be entered as ‘holder’.
- Unfree persons are recorded as holding property in a secondary information factoid only when there is a specific reference in the charter to a mansus/hoba etc as directly related to the unfree person, e.g. a reference to "sua hoba", not simply because an individual or family unit is transferred along with a homestead.

<u>Inheritance</u>: we record such statements as a secondary factoid only when a specific relative is named, or when one particular person is at least identified, even if they are anonymous: e.g. property which ‘genitor meus in heriditate dimisit’, but not ‘that I had from paternal and maternal inheritance’ or ‘portiona mea’, which we take to be boilerplate.
If property is referred to as *hereditas*, but without enough information provided for a Secondary info Factoid to be created about the person it is inherited from, the Latin term *hereditas* should be added for that AP.

Recording <u>confirmations of sales, grants and exchanges</u>: in such cases, we have two possible scenarios regarding the data available:

1) We have both the initial charter C1 and the confirmation charter C2, e.g. C1: X exchanges his properties P1 for Y's properties P2 at date D1; C2: Charlemagne confirms exchange by X and Y of properties P1 and P2 at date D2
2) We only have the confirmation charter C2, e.g. Charlemagne confirms exchange by X and Y of properties P1 and P2 at date D2

Because we are treating such confirmations as confirmations of transactions rather than confirmations of charters, we have to list all Associated Possessions in the confirmation factoid. Create two transaction factoids from the confirmation charter.

1) Result for scenario 1:
   - TF1 (primary, based on C1) TT = exchange, X = exchanger 1, Y = exchanger 2, APs =P1, P2, Date = D1
   - TF2 (secondary, based on C2) TT = exchange, X = exchanger 1, Y = exchanger 2, APs =P1, P2, Date = before D2
   - TF3 (primary, based on C2) TT = confirmation of exchange, Charlemagne = confirmer, X = exchanger 1, Y = exchanger 2, APs =P1, P2, date = D2
2) Result for scenario 2:
   - TF2 (secondary, based on C2) TT = exchange, X = exchanger 1, Y = exchanger 2, APs =P1, P2, Date = before D2
   - TF3 (primary, based on C2) TT = confirmation of exchange, Charlemagne = confirmer, X = exchanger 1, Y = exchanger 2, APs =P1, P2, date = D2

In the case of royal confirmations: grants by unnamed predecessors are to be ignored; grants by named predecessors are recorded as secondary TFs; where it is not clear whether rights/properties are being confirmed as opposed to granted, the TT is put as 'confirmation of grant', and the ruler given both agent roles 'granter' and 'confirmer'.

For exchanges involving monasteries: the monastery rather than abbot/abbess is recorded as exchanger, since their connection to the monastery will be recorded via an ARF. However, where agents are acting on behalf of another religious foundation (bishop for episcopal church, cleric for church etc) this will be recorded using Exchanger 1 (represented/acting), Exchanger 2 (represented/acting) etc, since there is no relationship recorded between them otherwise.

For rights over people, see Appendix 2.

MAIN INFO:

- **Factoid title** (text box): 'Charter short reference' + 'Transaction type'.
    - If more than one transaction factoid of the same type is found in the same charter, a number will need to be added manually at the end of the line to distinguish between them, in a separate sequence for each transaction type:
        - E.g.: the second donation in charter no. 114 from St Gall should be given the title 'SGA 114 Donation 2'.

- **From Charter** (authority list): the short reference to the source charter; type in the first few letters to bring up the available list.

- **Information status** (authority list): two options to choose from:
    - 'primary information': information relating to possessions which are directly affected by the content of the charter: e.g. land being transferred.
    - 'secondary information': information relating to possessions which are mentioned in the charter, but which are not changed or in any way affected by it: e.g. information relating to a previous owner (when this is not the same as the grantor), neighbouring landowners, an earlier grant in the case of a confirmation, or an earlier charter mentioned in the course of a dispute.

- **Further description** (text box): any comments intended for the final website. All bibliographical references to be included in the 'bibliography' text box.

- **Bibliography** (text box): all references to secondary literature in the 'Notes' text box should be entered here.
    - Bibliographical references should be given using Author last name + date; e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant 'Notes', 'Further description' etc text boxes.

    - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

DESCRIPTION:

- **Terms and conditions** (authority list, hierarchical, more than one choice allowed): any terms and conditions (e.g. full ownership; usufruct; to be effective post-mortem…) applying to all the associated possession(s) listed in the factoid. This is to avoid unnecessary repetition of data entry under 'Associated possessions'.
    - If any terms and conditions apply to some of the possessions involved in the factoid but not others, they will need to be entered separately in the 'Terms and Conditions' field under 'Associated possessions'.
        - For example: if X donates a piece of land and a cow to Y, with the right to alienate the cow but not the land, the general T&C of 'ownership' should be entered at the 'description' level, and one additional T&C of 'right to alienate' under the Associated possession 'cow'.
    - If none of the associated possessions involved in a factoid have the same terms and conditions, the field here can be left blank, and all terms and conditions entered under 'Associated possessions'.
    - General Terms and Conditions should always be left blank if the transaction factoid includes a Return (counter-gift or sale price - see below).

- **Transaction type** (authority list, hierarchical): the function of the transaction (as opposed to the diplomatic classification of the document, which should be entered under the 'Charter' main model): e.g. donation, exchange, etc. Some of these will be hierarchical 'parents' (e.g. 'donation' is a parent of 'donation post-mortem').
    - For secondary-information factoids which do not involve a transaction (e.g. previous ownership, neighbouring landholder), choose 'possession'.
    - For an ongoing list of transaction types, see: http://confluence.cch.kcl.ac.uk/display/MKCHEUR/15.+Transaction+types

- **Motivations** (authority list, more than one choice allowed): this is to record any reasons given for the action being taken: e.g. in recognition of service given, etc.
    - Material motivations should always be recorded.
    - Spiritual motivations (e.g. for the good of my soul) are not recorded here, but via the Agent role 'Spiritual beneficiary'. The same agents will also count as the recipients of more precise spiritual benefits recorded as Associated possessions: e,g. x number of masses for me / my husband / my ancestors).
        - NB If the spiritual beneficiary cannot be identified precisely (e.g. if Charlemagne refers to his 'fideles'), a generic Agent

‘Anonymous (fideles of Charlemagne 1)’ should be created; this can be re-used between charters.

- **Occasion** (authority list): this is to record any reference to the occasion on which the action was taken: e.g. at an assembly, at the *mallus*, etc.
    - This should reflect the vocabulary used in the source, giving the English term first with the Latin in brackets.

- **Notes** (text box): for any comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

DATES:

This section works exactly as in the ‘Charter’ main model. The information entered for the relevant source charter under the ‘Charter’ main model will be imported here automatically as the default date set. A crucial difference, however, is that the dates given here refer to the transaction, not the charter, so the information imported may need to be modified in view of this.

- **From/to** (authority list): This gives the *termini post quem* and *ante quem* for the transaction. From a data entry point of view, things go exactly as described under the ‘Charter’ main model.
    - For transaction factoids characterised as ‘primary information’, the date of the transaction and the date of the charter will almost always be the same (or at least will be recorded as being the same as far as we know / are concerned).
    - In the case of ‘secondary information’, on the other hand, the date will sometimes differ:
        - some secondary information will have its own date-range, with a high level of certainty: for instance for a ruler’s original grant mentioned in a confirmation (e.g. for DKAR 1:169, the factoid for the original grant can be assigned Tassilo’s date-range with a high degree of certainty).
        - However, for e.g. secondary information relating to neighbouring landowners, we’ll often have only the date of the charter itself, and won’t know how long they held the possession either before or after the charter was written. In such cases, keep the date of the charter, and add a note if it seems necessary.

- **Date** (authority list): as described under the ‘Charter’ main model.

- **Date certainty** (authority list): as under the ‘Charter’ main model, this applies to the degree of certainty of the statement entered in the date fields, *not* to its degree of precision.
    - Again, under this model the field applies to the transaction, not the charter, though for ‘primary information’ it will essentially replicate the information given under the ‘Charter’ main model.

- **Order number**: as described under the ‘Charter’ main model.

- **Dating notes** (text box): for any further information on this particular date (e.g. Latin text if it seems worthwhile, or to comment on date certainty). All bibliographical references to be included in the ‘bibliography’ text box.

ASSOCIATED AGENTS:

This is for listing any agents whose role relates to the transaction (as opposed to agents whose role relates solely to the production of the charter, such as the scribe or witnesses, who should be entered under the ‘Charter’ main model). Agents who are the object of a transaction should be entered under the ‘Associated possessions’ section rather than here.

- **Agent** (authority list): link to an existing agent (either by typing the first letters of the modern name or by using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): for the spelling of the name (along with any obvious attribute which helps identification, e.g. ‘episcopus’) given in the text.
  - In cases of multiple different spellings for the same name, enter them all in the same text box, separated by a semi-colon.

- **Role – Agent** (authority list, hierarchical): e.g. granter; recipient; confirmer; litigant.
  - Click here for a preliminary authority list.
    - For spiritual beneficiaries, see here.
  - The role of ‘holder’ is used to record secondary-information factoids.
    - Agent role should not be used to say things like ‘previous owner’ or ‘neighbouring owner’: this type of information should go in separate, secondary-information factoids, in which the agents should be given the role of ‘holder’ (previous ownership will be highlighted via the unique ID for the associated possession; a neighbouring relationship via an agent attribute and relationship factoid).
  - If the same agent exercises multiple roles within the same factoid, add each role on a separate ‘Associated agent’ line.
  - Agent role here is also used to distinguish which way goods are flowing in the case of reciprocal arrangements; see below under ‘Return’.

- **Extra info** (text box): any further comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

- **Order number** (text box): do not use.

ASSOCIATED PLACES:

This section lists places relating to the transaction. Places involved in the production of the charter itself should be listed under the ‘Charter’ main model rather than here. All places should be entered here, including those listed as Associated Possessions (or listed as the location of an Associated Possession), since Associated Possessions do not have boxes for ‘Original text’, ‘Role’ or ‘Place descriptors’ – but excluding places already associated with an institutional Agent, since the place will already be linked to the factoid by virtue of this.

Location of transaction: include here the location given in Actum clauses etc. Most charters will not distinguish between location of redaction and location of transaction; in those cases, enter the same location in both the ‘Charter’ main model and the ‘Transaction’ factoids (obviously only those that are primary information).

Relationships between different places should not be expressed here, but under the ‘Place relationship’ factoid created for this very purpose. In practice, this means that only the most precise location information given in the charter need be entered here, and wider territorial references, such as pagus or marca, can normally be omitted.

- For example: if vicus X is mentioned, and it is also said to be situated in pagus Y and next to vicus Z, the only place that needs to be listed here is vicus X. The information that vicus X is ‘in’ pagus Y and ‘next to’ vicus Z should be entered as a place relationship factoid. (The charter will still come up under searches for charters involving transactions made in pagus Y.)

- **Place** (authority list, hierarchical): link to an existing place (either by typing in any letters of the place name, medieval or modern, or by using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): for the spelling of the place name given in the text.
    - In cases of multiple different spellings for the same place name, enter them all in the same text box, separated by a semi-colon.

- **Role – Place** (authority list, hierarchical): e.g. ‘location of transaction’; ‘reference-point’ (for any places mentioned which do not play a direct role in the transaction, but are being mentioned as geographical markers – e.g. ‘near settlement X’).
    - When a ‘Place’ has been picked as the object of the transaction, the place role ‘location of possession’ should be used.

- **Place descriptor** (authority list, hierarchical, more than one choice allowed): this lists the place descriptors used to refer to the place: e.g. villa, vicus, pagus etc. It is possible for a charter to refer to the same place through more than one descriptor, so multiple ones can be selected from the list.
    - The lowest level in the hierarchy (i.e. the only level from which terms should be selected for this box during data entry) should be the Latin term in the nominative singular. These should then be grouped under parent categories, which should be in English.

- **Extra info** (text box): for any further comments. All bibliographical references to be included in the ‘bibliography’ text box.

- **Order number** (text box): do not use.

ASSOCIATED POSSESSIONS:

Entering and instantiating associated possessions: decision process

- Is Possession an Agent? If so, create Agent record (named or Anonymous), enter into Associated Possessions. Leave Entity Type and Quantity blank, do not instantiate.
- Is Possession a Place? If so, create Place record, enter into Associated Possessions. Leave Entity Type and Quantity blank, do not instantiate.
- Is Possession something that might be recognisable in another charter, e.g. a piece of land, a church? If not (e.g. 1 suckling pig, 25 solidi) input Entity Type and Quantity/Unit of Measure quantity as applicable, do not instantiate.
  - NB: immaterial possessions such as rights and privileges should normally be entered in this way, since they are not stable Objects. Only create Objects for immaterial possessions if they are likely to be transferred to other Agents (rather than simply confirmed to the original recipient).
  - NB: generic property (i.e. any AP with the Entity Type 'Unspecified property') need not be instantiated as a rule, unless a charter contains multiple factoids covering the same unspecific property.
- If Possession is something that might be recognisable in another charter, you will need to create 1 or more Objects.
  - Is there only 1 of the Possession? If so, input Entity Type and Quantity = 1, then instantiate.
  - If there is more than 1 of the Possession, does the charter distinguish in any way between them (e.g. 2 portions of a vineyard with different boundaries)? If so, input these separately with Quantity 1 and instantiate.
  - If there is more than 1 of the Possession, but the charter does not distinguish between them (e.g. 4 mansi), then input as a single possession with appropriate Entity Type and Quantity and then instantiate.

- **Kind of possession** (authority list, hierarchical): this is a generic indication of the function of the Associated possession: for instance 'transferred object', 'census', 'price', 'equivalent value'.
  - See here for a preliminary list.
  - 'Transferred object' relates to the main transacted item in the charter, and so should not normally be used for 'Return' associated possessions, except in the case of exchanges.

- **Agent** (authority list): for agents who are objects of the transaction (for example, transferred along with the land).
  - Link to an existing agent (either by typing the first letters of the modern name or by using the lookup tool), or create a new one via the green + sign.

- **Place** (authority list, hierarchical): use this field to enter places which are objects of the transaction. All Places should also be entered under 'Associated Places'.
  - A piece of land counts as a 'Place' when the charter involves everything in a given place (e.g. 'villa X with whatever may be found

there, with appurtenances'), as opposed to a more circumscribed object (e.g. a vineyard or a field, or 'my things *in* the villa X'), which is counted as an Object with a location.
    - Link to an existing place (either by typing in any letters of the place name, medieval or modern, or by using the lookup tool), or create a new one via the green + sign.

- **Object** (authority list): for a new 'Object', this is automatically filled in if the 'Instantiate' box is ticked, and a corresponding 'Object' is created.
    - NB if 'instantiate' is checked for a possession with a quantity above 1, a single object is created (e.g. 2 vineyards in place X will be created as a single object). If this is not a suitable solution, enter them separately.
    - To refer to an already existing object (i.e. one that has already been created for another factoid): start typing letters from the Entity type or Charter short reference to bring up a list of available objects, or use the lookup tool.
        - In doubt as to whether two different charters are referring to the same object, create two different objects.

- **Type of Entity** (authority list, hierarchical): use for 'Objects' only (leave blank for Agents and Places): e.g. horse, sword, vineyard, tolls, solidi, denarii, unspecified property...
    - When creating a new entity type, specify the hierarchical parent whenever possible (e.g. horses and pigs will have the parent 'animals').
        - In addition to hierarchical entries in English covering different Latin terms (e.g. 'homestead', within the hierarchy 'Buildings' (or 'Economic units'), to cover for terms like villa, mansus, hoba etc), it is also possible to record Latin terms directly as ET where their use is ambiguous and cannot be allocated to a specific hierarchy (e.g. where it is impossible to tell whether *mansus* denotes a building only or a homestead).
    - For a preliminary authority list, see here.
        - Specific spiritual benefits for the granter/vendor or a third party, e.g. 'prayers for my soul and my country', 'feeding five paupers' should be recorded in Associated Possessions as Spiritual benefit/Prayer etc. The agents concerned (including the granter/vendor) should be recorded as Associated Agents with role of Spiritual beneficiary.
        - Generic spiritual benefits (e.g. 'for the good of my soul') should not be recorded as an Associated possession, though the granter should still be listed as Spiritual beneficiary in the Agent role.
    - When entering a recurring payment, use the Terms and Conditions to indicate frequency (e.g. 'yearly', 'weekly'…)

- **Quantity or amount** (text box): for quantities and sums relating to the Entity type.
    - Fractions of Entity types or Objects are entered as decimals, e.g. one-third = 0.33.

- Quantities are used only for Objects, not Agents or Places.
- Quantities must be used if an object is to be instantiated, e.g. for '4 mansi', '1 vineyard'.
- They will not normally be entered for objects that cannot be meaningfully counted, i.e. 'Right to fish', 'all my property', 'my land at X'.
  - However, such objects may occasionally need to be instantiated in order to link together 2 transactions in the same charter e.g. 'I give all the land at X, which I inherited from my father.' They should be given a nominal quantity of 1 in that case.
- There are separate fields for the number of Objects (e.g. for 5 mansi, whatever their size) and for the number of Units of Measurement (e.g. for 8 jugera of ploughland, 1 field from which 3 wagonloads of hay can be got).
  - Quantities of money (solidi etc) are entered under Units of Measurement, with Entity Type as Money (or, if the charter specifies the type of metal as 'Gold (money)', 'Silver (money)').

- **Quantity or amount (Related to Unit of Measure)** (text box): for quantities and sums relating to the Unit of Measure.

- **Unit of measure** (authority list): for any unit of measurement (e.g. solidi, denarii, wagonloads of hay…)
  - For composite sums (e.g. 12 solidi and 30 denarii), enter as two separate Associated possessions.

- **Location of possessions** (authority list, hierarchical): enter the location of the Object here (do *not* fill if the possession is itself already a place). This allows us to make clear which Associated possession relates to which Associated place.
  - Link to an existing place (either by typing in any letters of the place name, medieval or modern, or by using the lookup tool), or create a new one via the green + sign.
  - All places entered here should correspond to places listed under the 'Associated places' section.
  - <u>Only input a location for objects and agents if they are firmly connected in the text</u> (e.g. *mancipia* on a particular property, but not 'my property in X Y and X plus my *mancipia*').

- **Original text** (text box): the Latin text describing the possession (Entity type or Individual Agent/Place).
  - In cases of multiple different spellings for the same name, enter them all in the same text box, separated by a semi-colon.

- **Terms and conditions** (authority list, hierarchical, more than one choice allowed): for any Terms and conditions applying only to that particular Associated possession, as opposed to Terms and conditions applying to all possessions involved in the factoid (which should be entered in the general Terms and conditions field under 'Description' to save time).

- Terms and conditions should include any further conditions relating to frequency (e.g. yearly payments) or purpose (e.g. to indicate a donation to provide for lights for a church).

- **Appurtenances** (authority list, more than one choice allowed): entering all appurtenances would be a research project in its own right, and a need for it would in any case be better answered via a full-text search. We will only be recording Latin terms for people included in appurtenance clauses here:
  - All people (free or unfree) mentioned in appurtenance clauses should be included under their Latin names in the nominative plural (e.g. mancipia, servi, accolae).
    - References to specific people (e.g. 'two beekeepers', 'my *ancilla* called Berta') should be entered as individual Agents rather than as Appurtenances.

- **Latin Terms** (authority list): the exact Latin term used in the text to describe the Entity type, in nominative singular form.
  - Standard spelling to be taken from: Lewis & Short : http://www.perseus.tufts.edu/hopper/text?doc=Perseus%3Atext%3A1999.04.0059%3Aalphabetic+letter%3DA ;
  - or failing that, the Niermeyer first edition: http://archive.org/details/MedievalLatinLexicon

- **Return** (tick-box): tick in cases of reciprocal arrangements.
  - For example, in the case of an exchange: agents will be identified as 'Exchanger 1' and 'Exchanger 2' under 'Role'.
    - Any Associated possessions for which the 'Return' box has *not* been ticked are assumed to be going in the direction Exchanger 1 to Exchanger 2; any Associated possession for which the 'Return' box *has* been ticked are going in the direction Exchanger 2 to Exchanger 1.
  - The same goes for all reciprocal arrangements. For example:
    - In a sale, enter each agent only once with the role of 'Seller' or 'Buyer' (the money payment should then be entered with the 'Return' box ticked);
    - in the case of a lease: 'lessor' and 'lessee' are sufficient to know which way the property and the census are going (the Return box should be ticked for the census).

- **Third-party return** (tick-box): tick for cases where the return is not only to the original agent but also to a third party (e.g. masses for my soul and that of my mother; in this example the mother will appear in the Associated Agents list with the role 'third-party spiritual beneficiary'; in this case the original grantor will need to be distinguished from her as 'first-party spiritual beneficiary').

- **Instantiate** (tick-box): tick this box to turn the 'Entity type' into an 'Object' with a distinctive ID, so that it can be identified as being the same Object across several different factoids (for example, in confirmations, the ID allows the database to record that the piece of land involved in the original grant is the same as the one involved in the confirmation).

  - This creates as many individual Objects as were specified in the 'Quantity' field.
  - In practice, this means that only those objects which are capable of being identified across different factoids need to be turned into individual Objects and given an ID.
  - As a rule of thumb:
    - landed property should *always* be turned into an individual object: however vague the description, there is always a hope it might be recognisable through reference to a previous owner, or in a confirmation;
    - sums of money and units of value more generally obviously *don't* need to be recognisable as individual objects, so the boxes shouldn't be ticked in their case;
    - material goods are a more borderline matter, and require more of a judgment call: a generic reference to 'clothing' will obviously not need to be given a distinctive ID, but a reference to a particular item of clothing with a detailed description might; similarly with a horse, a sword, a book, more obviously a saint's relic, etc. Whether or not to create an individual object in such cases depends on an assessment of whether there is enough information there to make the same object identifiable in a different factoid.

- **Extra info** (text box): for any further comments. All bibliographical references to be included in the 'bibliography' text box.

- **Order number** (text box): do not use.

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IIID: MISCELLANEOUS FACTOIDS (main model)

This factoid covers any information which seems worth including in the database, but which is not reducible to the data entry form specifically devised for ‘Transaction factoids’.

Appointment to an office should be recorded as a miscellaneous factoid. We should record the report of a (non-saintly) burial, e.g. record ‘Pippin is buried in St Denis’, but not ‘Boniface is buried in Fulda’. Other common miscellaneous events to record include foundations of churches, instances of individuals joining the clergy, relic translations, and killings.

NB Event type ‘foundation of church’ should be used for foundations of all *ecclesiae*, *oratoria*, *cellulae*, *tituli*, etc. (though note that monasteries and xenodochia have separate event types). The place role ‘Location of event’ should be used when in all foundations with a definite, known associated place.

- Event type ‘consecration of church’ should <u>only</u> be used when a consecration is not known to have coincided with a foundation. If both events occur at roughly the same time (i.e. they are both mentioned in a document), event type ‘foundation of church’ is used to cover both the foundation and consecration, and if applicable, the appropriate Agent should be recorded with Agent role ‘consecrator’, but do not repeat the institutional agent by entering the additional agent role ‘consecrated institution’ (the institutional agent will already appear under agent role ‘founded institution’).

MAIN INFO:

- **Factoid title** (text box): ‘Charter short reference’ + ‘Event type’.
    - If more than one miscellaneous factoid of the same type is found in the same charter, a number will need to be added manually at the end of the line to distinguish between them, in a separate sequence for each event type.

- **From Charter** (authority list): the short reference to the source charter; type in the first few letters to bring up the available list.

- **Event Type** (authority list, hierarchical): the action being taken (e.g. foundation of a monastery).

- **Further description** (text box): any comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

- **Bibliography** (text box): all references to secondary literature in the ‘Notes’ text box should be entered here.
    - Bibliographical references should be given using <u>Author last name + date</u>; e.g. Depreux (2001).
    - Start each reference on a new line.
    - Do not give page references here, but in the relevant ‘Notes’, ‘Further description’ etc text boxes.

    - When adding an item, make a note of the full bibliographic details and either forward to whomever is keeping the bibliography or record on the relevant Confluence page.

DATES:

This section works exactly as in the ‘Charter’ main model. The information entered for the relevant source charter under the ‘Charter’ main model will be imported here automatically as the default date set. A crucial difference, however, is that <u>the dates given here refer to the event, not the charter</u>, so the information imported may need to be modified in view of this.

ASSOCIATED OBJECTS:

- **Object** (authority list): link to an existing object (either by typing the first letters of a word or by using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): original text.

- **Extra info** (text box): any further comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

- **Order number** (text box): do not use.

ASSOCIATED AGENTS:

- **Agent** (authority list): link to an existing agent (either by typing the first letters of the modern name or by using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): for the spelling of the name (along with any obvious attribute which helps identification, e.g. ‘episcopus’) given in the text.
    - In cases of multiple different spellings for the same name, enter them all in the same text box, separated by a semi-colon.

- **Role – Agent** (authority list, hierarchical): e.g. founder, foundation (for a monastery).
    - Click <u>here</u> for a preliminary authority list.
    - If the same agent exercises multiple roles within the same factoid, add each role on a separate ‘Associated agent’ line.

- **Extra info** (text box): any further comments intended for the final website. All bibliographical references to be included in the ‘bibliography’ text box.

- **Order number** (text box): do not use.

ASSOCIATED PLACES:

Relationships between different places should not be expressed here, but under the 'Place relationship' factoid created for this very purpose. In practice, this means that only the most precise location information given in the charter need be entered here, and wider territorial references, such as pagus or marca, can normally be omitted.

- For example: if vicus X is the location of the action, and it is also said to be situated in pagus Y and next to vicus Z, the only place that needs to be listed here is vicus X. The information that vicus X is 'in' pagus Y and 'next to' vicus Z should be entered as a place relationship factoid. (The charter will still come up under searches for charters involving pagus Y.)

- **Place** (authority list, hierarchical): link to an existing place (either by typing in any letters of the place name, medieval or modern, or by using the lookup tool), or create a new one via the green + sign.

- **Original text** (text box): for the spelling of the place name given in the text.
    - In cases of multiple different spellings for the same place name, enter them all in the same text box, separated by a semi-colon.

- **Role – Place** (authority list, hierarchical): e.g. 'location of foundation'.

- **Place descriptor** (authority list, hierarchical, more than one choice allowed): this lists the place descriptors used to refer to the place: e.g. villa, vicus, pagus etc. It is possible for a charter to refer to the same place through more than one descriptor, so multiple ones can be selected from the list.
    - The lowest level in the hierarchy (i.e. the only level from which terms should be selected for this box during data entry) should be the Latin term in the nominative singular. These should then be grouped under parent categories, which should be in English.
    - Place descriptors include spatial terms like 'inside', 'outside', or 'in public', which will be read as applying to any other term chosen.

- **Extra info** (text box): for any further comments. All bibliographical references to be included in the 'bibliography' text box.

- **Order number** (text box): do not use.

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APPENDIX 1: AUTHORITY LISTS:

This is a list of authority lists used in the database (except for those which, like Place, Agent or Charter, are themselves a main model in their own right), with hyperlinks.

IVA: AUTHORITY LISTS (hierarchical):

Agent Types: ‘Agent’ main model

Attribute/Relationship Types: ‘Agent attribute and relationship factoids’ main model

Charter Features: ‘Charter’ main model

Dating Systems: ‘Charter’ main model

Agent Roles: ‘Charter’, ‘Transaction factoids’ and ‘Miscellaneous factoids’ main models

Place Roles: ‘Charter’, ‘Agent attribute and relationship’, ‘Transaction factoids’ and ‘Miscellaneous factoids’ main models

Event Types: ‘Miscellaneous factoids’ main model

Appurtenances (more than one choice allowed): ‘Transaction factoids’ main model

Entity Types: ‘Object’ and ‘Transaction factoids’ main models

Information Status: ‘Transaction factoids’ main model

Motivations (more than one choice allowed): ‘Transaction factoids’ main model

Place Descriptors (more than one choice allowed): ‘Charter’, ‘Transaction’, ‘Agent attribute and relationship’, ‘Place relationship’ and ‘Miscellaneous’ main models

Possession Types: ‘Transaction factoids’ main model

Terms and Conditions (more than one choice allowed): ‘Transaction factoids’ main model

Transaction Types: ‘Transaction factoids’ main model

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IVB: AUTHORITY LISTS (flat):

Identification certainty: ‘Agent’ main model

Authenticity: ‘Charter’ main model

Charter Transmissions: ‘Charter’ main model

Diplomatic classifications: ‘Charter’ main model

Repositories: ‘Charter’ main model

Textual integrity: ‘Charter’ main model

Latin Terms: ‘Agent attribute and relationship factoids’ and ‘Transaction factoids’ main models

Geo-Relations: ‘Place relationship factoids’ main model

Occasions: ‘Transaction factoids’ main model

Date points: ‘Charter’, ‘Transaction factoids’, ‘Agent attribute and relationship factoids’, ‘Place relationship factoids’, and ‘Miscellaneous factoids’ main models

Date certainty: ‘Charter’, ‘Transaction factoids’, ‘Agent attribute and relationship factoids’, ‘Place relationship factoids’, and ‘Miscellaneous factoids’ main models

Dedication: ‘Agent’ and ‘Object’ main models

APPENDIX 2: RIGHTS OVER PEOPLE

1) People as objects of transaction - when people (free or unfree) are granted, sold, exchanged etc as a whole.
   Record as TT = grant/sale etc, People transferred appear in the AP as agents, they do not need to be recorded as Associated Agents as well. If their personal status is mentioned, this is recorded in an ARF

2) People whose legal status is being changed by a transaction

   a) People being manumitted (see Problem Case 12, WBG 68, Problem Case 2, BER 6)
   Record as TT = manumission, People being manumitted are Recipients of ET = "free status".
   If the people being freed still have to pay for mundiburdis or do labour services on a regular basis, this is recorded as Census or Required Action in APs, either to the Granter of the manumission or to a Third-Party Material Beneficiary, with T&C "for mundiburdis", "for tuitio" etc. (The specific term in the charter should be used in T&C).
   If the people being freed can also buy additional rights for themselves (e.g. BER 6 where they can buy the right to leave the land), this is recorded as KP "Transferred object" with ET of form "Right to...", and the price to be paid is recorded as an additional AP with KP= Conditional Price

   b) People having legal status changed in other ways (see Problem Case 110, CHLA 28:855)
   Record as TT=Grant, ET = Change of Status and T&C giving details of new status.
   Regular payments for protection or labour services or one-off opportunities to buy additional rights are recorded as for manumissions.

3) Mundium of woman as object of transaction (see Problem Case 90, CHLA 28:853)
   Record as TT = grant/sale etc. The AP for the transferred object has ET = "mundium", the woman is listed as an Associated Agent, with Agent role "Object of Transferred Rights"

4) Protection being granted to a person
   This can be granted by a king or by a monastery – in which case recipient may have to pay for it or do labour services in return (see Problem Case 39, WBG 102).
   Record as TT=grant. The AP for the transferred object has ET="protection/royal protection" (and appropriate Latin terms), person being protected has agent role Recipient. Any return demanded is listed as Census, Price or Required Action in APs.

5) Rights to labour services of others being held
   In some cases (e.g. surveys), labour services are simply stated as existing, without any reference to how they are acquired, or to any protection that is being given in exchange (in contrast to no. 4 above).

Record these as TT ="Possession of labour services", with those responsible for carrying out the services having agent role of "Labourer" and those receiving them as "Recipient", KP="Required action", and ET as "Labour services" or some more specific term for form of labour service.

6) Rights to the labour services of others being granted

a) In some cases rights to labour services are being given to third parties as part of grants to those owing the labour services, (e.g. DKAR 1: 169 where Charlemagne allows people clearing land to retain that land if they do service to Wissembourg)
Record as TT = grant, those doing the labour services with agent role of "Recipient" and with a third-party return for the labour services.

b) In other cases rights to the labour services of others are being granted by Agent A without any reference to grants made to the labourers themselves (in contrast to no. 5a above) and where it is only the labour services being granted, not the people themselves (in contrast to no. 1 above). See e.g. ENN 2:2, when Tassilo states that some men on land given to a monastery should do labour service.
First create an SF for "Possession of labour services" (as above in no. 5), which will indicate that Agent A is holding these labour services in the first place. In this factoid, the ET for labour services should be instantiated as an object. This Object can then be the AP being transferred in the primary factoid. The people doing the labour service do not need to be recorded as Agents in this primary factoid, since the Object will link the two transactions together.