Getting It Right: Data Entry Standards for Genealogists

Judith Schaefer Phelps 21 September 2010

What is a style guide?

A style guide is a reference tool used to resolve questions in publishing situations. Writers and editors are familiar with the *Chicago Manual of Style*. Scientists and other professionals also have style guides specific to their disciplines. Genealogists also have a style guide.

Why a style guide for genealogists?

Traditionally, paper and pen genealogists attempted to enter as much information as possible on a family group sheet. Today, genealogists typically enter research data into predefined or designated fields of a database. Consistency in data entry becomes the key to managing large data sets and generating accurate reports. Consistency means that you enter all of your data in a uniform manner based on a set of guidelines understood and used by many people.

Is there a style guide recommended for genealogists?

This easy-to-understand style guide defines and explains generally accepted standards for adding, organizing, maintaining and sharing family history records in a consistent manner.

Slawson, Mary H., 2002, *Getting It Right: The Definitive Guide to Recording Family History Accurately*, Deseret Book Company, Salt Lake City, 263 pgs.

Ms. Slawson published this guide after attempting to merge two huge databases (over 250,000 records each) and several smaller databases. The project took more than two years to complete because of inconsistencies in the data. The guidelines presented in her book are a result of the learning curve. The guidelines presented in Ms. Slawson's *Getting It Right* will help you:

- Decrease the time needed to search through family history databases.
- Share information with family members and other researchers more easily.
- Reduce errors and rework when submissions are rejected by online repositories.
- Increase the speed of merging family history databases.

Do all genealogy management softwares handle information in the same way?

Each software has its own design. All genealogy management softwares have designated fields prompting you to enter specific data. The software then stores that data, and stored data is used to generate a variety of reports. Some designated fields are searchable and others are not. Some softwares are more sophisticated than others. Mores sophisticated softwares have more designated fields and more report options.

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Can genealogy data be transferred from one software to another without retyping it?

Yes, but each situation is different. GEDCOM (**GE**nealogical **D**ata **COM**munication) is an electronic protocol used to transfer stored data from one genealogical software to another. A successful transfer relies on consistent data stored in designated fields common to both databases. If the exporting software has more designated fields than the importing software, then some data may be lost.

Can a personal genealogy database be linked to a public database to merge data?

Some genealogical management softwares include links to other resources, thereby offering you an opportunity to extend your research, e.g., *Family Tree Maker* is linked to *Ancestry*, while *Legacy Family Tree* is linked to *FamilySearch*. Be aware, however, that these are two-way links and data can be either downloaded or uploaded. With consistent entry of data in designated fields, you improve your chances for sharing or exchanging data more smoothly and accurately.

What are some guidelines for entering consistent data?

Below are some basic guidelines for entry of names, dates and places. Ms. Slawson presents many more guidelines with examples in her style guide.

Names

- Six elements make up a name: given name, middle name, surname, title prefix, title suffix plus alternate names. Not all names have all elements. You will want to enter each element in the designated data field.
- A birth name establishes the identity of an individual in a genealogy database. Enter the name given at birth (or baptism) in the language used at the time of the event (e.g., French, German, Latin, etc.) in the *given name field*.
- Enter the surname in the language used at the time of the event in the *surname field*. Enter the Anglicized name in the *alternate name field* and explain details in the *research notes field*. Document the name in the *source field*.
- Enter an individual's birth name in the *given name field*, even if the person was known by another name all their life, and even if that person is identified on a death record by the more familiar name.
- Enter maiden names for all females, even if previously married. If a wife's maiden name is unknown, leave it blank until known.
- Enter all names in mixed-case letters with the indicated character spacing as shown on the birth record. The technique of "all caps" is no longer recommended; it could alter the name.
- If a given name is unknown, leave the *given name field* blank. Do not enter "unknown" in the field.
- Capitalize the first letter of all names and capitalize all initials. Insert a period after the initial unless the birth or baptismal record does not use a period after the initial. Follow the initial and period (or the stand-alone initial) with a single space, not a double space. A computer notices differences in spacing.
- Never use special characters in a *name field*, e.g., braces, brackets, question marks or equal signs.

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- Do not use "formerly" or "now" in *given name fields* or surname fields. Instead, enter alternate names, including alternate spellings or surname changes, in the *alternate name field* (AKA field).
- Enter an explanation, if there is a story behind the alternate name, in the *research notes field*. Document the source of the alternate name in the *source field*.
- Do not include military or professional titles in the *given name field;* these are earned titles, not part of a birth name.
- Enter titles in the *title suffix field* or *title prefix field*. Explain titles in the *research notes field* and document titles in the *source field*.
- Enter religious names in the *alternate name field* and enter the individual's birth name in the *given name field*. Explain this information in the *research notes field*.
- Enter birth right titles, e.g., Prince Charles, in the *given name field*. Document the name in the *source field*.

Dates

- The most readable and reliable format for presenting dates is day, month, year; this style is least likely to create confusion when entering, matching, or merging data.
- Abbreviate months as: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec without a period. Enter days with double digits and present four digits for the year.
- If a baptismal date is entered into the *birth date field* because an actual birth record is not available, then precede the date with a code of "bap" or "chr." Explain this in the *research notes field*. Document the date in the *source field*.
- Some softwares have a designated field for recording a baptismal or christening date. It is not necessary to code baptismal or christening dates when entered into a designated *baptismal field* or *christening field*.
- Dates can be estimated, if documented as such, by preceding the date with one of the following codes which are all entered without a period:
 about = "abt" after = "aft" before = "bef" between = "bet" calculated = "cal"
- The terms, "Infant," "Child," or "Deceased." are acceptable entries in a *death date field*, if a death date is unknown. Use the code "Infant" for a stillborn. Use "Infant" for a young individual from birth to age 3. Use "Child" for someone aged 3-8. Use the code "Deceased" for anyone older than age 8, if you have no clue about the death date. Explain the circumstances and your reasoning in the *research notes field*. Document in the *source field*.

Places

- Four basic rules govern the entry of place names:
 - Always enter the place name as known on the day the event took place in the *place name field*. Never use "formerly" or "now" in a *place name field*.

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- Always enter place names in *place name fields* beginning with the smallest jurisdiction and ending with the largest.
- Enter the place where an event occurred with a least three levels of jurisdiction and follow states and provinces with their corresponding country name.
- Always spell out the full name of the jurisdiction you are describing, (e.g., city, township, county) except for long country names, e.g., The United States of America, which is abbreviated USA.
- Some softwares provide a *current place name field*. If so, enter the current place name in the *current place name field*. If the history of a place is important, explain it in the *research notes field*. Document the place name both the place name at the time of the event and the place name as known today in the respective *source fields*.
- Spell out the names of states for the benefit of international readers; do not use former or current postal code abbreviations.
- If you expand your software's data entry options to include a *baptismal place field* and / or *burial place field*, then you may want to add another level of jurisdiction for places entered into those fields. Add the name of the church or place of baptism in the *baptismal place field* as the smallest entity of a location and continue describing the place name with the other jurisdictions of a location description. Enter the name of the cemetery or mausoleum in the *burial place field* as the smallest entity of a location, and then continue with other jurisdictions in the appropriate order. Document the information in the *source field*.
- If the exact location is unknown, insert commas as placeholders for each unknown jurisdiction of a location. The commas are necessary for a computer to sort place information accurately when generating reports.
- If the location of an event is a family farm, enter the township, or alternatively, use a code such as "near" or "South of" followed by the name of the nearest village or town.

The above is just a sampling of the many guidelines offered in Ms. Slawson's book. Her style guide offers a systematic approach to recording genealogical information in a way that will benefit families now and for generations to come. By using the guidelines in *Getting It Right*, you avoid duplications in family history records, and your research will fit more smoothly and efficiently into the jigsaw puzzle of family histories being assembled around the world.