YourTrees – The Complete Guide

How to create great digital family history records and backup your research

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with Hilary Waller on Citations

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Chapter 1. Introduction

Family History research has been transformed by online services such as Ancestry and Findmypast, and made popular by TV programmes such as *Who Do You Think You Are?* Most family history research is captured in a desktop or online application. This makes it far easier to manage our data, but even if we have a willing legatee for our research, how transferable is it? Is the platform on which it is stored current? Is it in a proprietary format, only accessible using a specific application or with an expensive subscription? Is the data backed up? Does your family even know of its existence? Will they dispose of or repurpose your computer oblivious to the presence of your hard won data?

Keeping your family tree in one place in a proprietary format runs the risk that it will not be accessible to your descendants. If your computer should crash, it may not even be accessible to *you*!

Berkshire Family History Society's **YourTrees** service will help you create a secure, enduring copy of your research. Now your data is secure, is it of sufficient quality to be useful to later generations?

Analysis of the first four months of data submitted to YourTrees produced some surprising results – for every 1,000 records there were 157 issues - a 15.7% error rate – which could be grouped into three main categories:

61%	Date related
25%	Place related
14%	Name related

There are many reasons for these errors. There is, of course, straightforward human error - the human brain is capable of advanced reasoning but we are, frankly, very bad

at performing repetitive tasks consistently – and creating family history records is very repetitive. Beyond human error there are three main reasons why data is not stored as well as it could be.

1. Old habits die hard

Those who started their research before the era of personal computers and who migrated from paper records to digital may have brought some old habits with them. Computer data is highly structured – it is that capability that allows the complex multi-generational family relationships to be created. But there is no structure to paper records – it is essentially an unrestricted flat space on which you can record data in whatever way you please.

Even if you use a computer you may have developed techniques to lessen the workload – abbreviations and personal coding systems, or a relaxed approach to recording data. For example, you may record a date of death as "Died 14/11/1914 from wounds in battle at Ypres." In reality, that is a fact (death), a date, a means of death and a place – four separate attributes.

2. Anything goes

It was the Church of the Latter Day Saints in Utah, USA who developed a format called GEDCOM (for **GE**nealogical **D**ata **COM**munications). The first version was released in 1984 and the current version is 5.5.1 (Version 7 is available but until it is universally adopted by the software vendors, it remains in the shadows.)

GEDCOM is a format for **transferring** data between genealogy programs. All the programs have their own proprietary database format for storing the data and although some programs can import the database of other programs, not all can do so. GEDCOM is the lingua franca that allows us to exchange our data between programs.

The GEDCOM standard for names, places and dates, uses an unstructured, free text format – which means that whilst you are only supposed to use fields for the intended

purpose, you can enter almost anything in them. That approach is often reflected in the way genealogy programs allow you to enter data.

There are very good reasons why the fields were formatted this way but one of the downsides is it enables bad data habits to develop.

3. Because you can

Family tree data entry is not simple because of the amount and variety of data that a life generates. The user interface varies between genealogy programs as each tries to balance ease of use with capturing the data correctly. But the free text nature of most of the fields remains, which means that it is easy for users to take shortcuts. Why would you look for the technically correct way to add a note to a person's name when you can simply enter it directly into the name field?

That is what the rest of this guide is about. It is a tutorial that is as simple as we can make it about how to express the data in ways that maximise its use for future generations who are exclusively of the digital era, and to ensure your data can be transferred between family tree programs with the utmost fidelity.

Chapter 2: General principles

For your research to be useful to others, it needs to be presented in terms they can understand. Many of us have cursed the scribe whose records we cannot decipher – let us not be the modern day equivalent. This guide will help you avoid the common pitfalls and ensure your research is recorded properly.

When we record data for ourselves we can infer a lot from a little. For example if I record a burial place as *Fyfield*, I know that means *St Nicholas Church, Netherton Lane, Fyfield, Berkshire, England* but the further away from Fyfield a viewer of my tree lives, the less they can infer from a single word. They need to know it is *St Nicholas Church, Netherton Lane, Fyfield, Berkshire, England*

The **country** name is necessary in an address because there are many Berkshires in the world. The **county** name is necessary because there are many Fyfields in the country and so on. There is a Fyfield in Essex where, just to add to the confusion, the parish church is also St Nicholas. Ambiguous records are the bane of a family historian's life and we will do everyone a favour by making no room for them in the records *we* create, even if it takes a little longer to record a fact. We have to be explicit and view our data through the eyes of others.

There are two mantras we need to use. The first is a centuries old saying that is very relevant to recording family history in a software program.

"A place for everything, and everything in its place"

It should inform every entry we make in our family tree program. Date fields should contain dates, place name fields contain place names and name fields contain names – it is that simple. The vast majority of problems we have seen in our analysis of YourTrees data are due to a single root cause – the placing of data in the incorrect field.

2. General principles

The second mantra is fundamental to family history research, especially if you use an online service that prompts you with hints about possible matches to entries in your tree:

"Believe no-one; check everything"

I once accepted an Ancestry hint from another user without checking it and then watched in amazement as my family of humble agricultural labourers was transformed through the maternal line as I went back through the generations to ever more grand positions starting with Esquires and ending at Lords. It would have been a great story but it did not feel right. I went back to the original hint and checked it – as I should have done in the first place. I found there were two women of the same name christened a few months apart in the same location but from very different backgrounds. I messaged the other tree owner who admitted she had delegated the research into that branch of her tree to a cousin and had not checked her work.

Berkshire FHS has developed a number of tools to help you improve the quality of the data in your family tree:

1. Regular workshops where members are coached on best practice.
2. Data quality reports that user can run to identify possible issues with specific data records such as
   a. Name-related reports that will look for records where names are missing, contain unusual characters or where the gender is not given.
   b. Place-related reports that concentrate on consistency and completeness.
   c. Date-related reports that will identify incorrectly formatted dates
3. Crib sheets for you to use when entering data to make sure you record data correctly
4. A GEDCOM Converter that will correct many common errors as we import your tree to YourTrees

5. A Boomerang Tree service where we will return a corrected copy of your tree to you This alone can save many hours of work.
6. This guide, which describes everything above

We will be paying a lot of attention to ways to remedy existing data and you will no doubt be wondering where to start. There is no escaping the fact you will have some remedial work to do on your existing data but you can stop the problem growing by changing your current data entry practices. Then you can turn your attention to remedying the older records. This may require you to examine and change long established working practices. I mentioned earlier that humans are not good at carrying out repetitive tasks consistently. Regrettably, we are not terribly good at embracing change either and old habits die hard. Checklists will help.

Checklists - we call ours Crib Sheets - are used in all sorts of situations where highly trained individuals are involved, from pilots to operating theatre staff, so there is no shame in using them for more mundane purposes.

Each crib sheet deals with one of the major data entry subjects we have covered in this guide and does so - usually - on one side of an A4 sheet, and continues with some examples of how to achieve the recommendations in some of the most popular programs.

The crib sheets appear in the Appendices. They are also available to download from the YourTrees member's section on the Berks FHS website, where you will find the most up-to-date version.

Chapter 3: Dates

Chronology matters

Dates allow us to identify the living from the dead, to calculate ages and create a chronology but that is dependent on a properly formatted date field. However the GEDCOM date field format is alphanumeric which leaves the door wide open for invalid characters to be included, such as ? !/ \ { } [ ]( ) > <:- . , as well as text of any kind. There are also elements which we would normally consider to be valid date content - ordinals such as nd, rd, st and th, which are not supported by GEDCOM.

What makes a 'good' date?

Fundamentally, date fields should contain dates and only dates. Facts related to the date go elsewhere. That may seem obvious but you would be surprised how often extraneous things like time, place or cause of death appear in YourTrees date fields. These facts are important and they need to be recorded, but in the proper place (Mantra One).

Let us take a look at the GEDCOM date format in a little more detail. The format selected by the Church of LDS is **DD MON YYYY** eg **01 APR 2000**

This format is familiar to most people outside the US but not in the US where the month traditionally precedes the day. However, as the month is expressed as a name not a number, the precise date should be clear to everyone[1]. The GEDCOM format is known as little-endian because the elements proceed from smallest to largest unit. The ISO date format (international date format), YYYY-MM-DD is known as big-endian for similar reasons. It produces some odd results in YourTrees where our Top 5 oldest people are about 2,000 years old, because 1859-04-07 will be seen as the year 0007!

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[1] US users may find that their genealogy program displays dates in US format e.g. April 01, 2000. This will almost certainly be a **display** function, with the data in the database being held in a universal format

The basic date format is simple – 1st April 2000 is recorded as 01 APR 2000. For numbers below 10 you can omit the leading 0, and the month name can be entered in sentence case e.g. 1 Apr 2000. If you do not know the exact day you can omit it. If you do not know the month you can omit it and the day but you cannot omit the year and just have day and month. That leaves us with the following valid formats:

<div align="center">

01 APR 2000

01 Apr 2000

1 Apr 2000

1 APR 2000

Apr 2000

APR 2000

2000

</div>

Numeric dates, ISO dates, separators such as - or / and, and all special characters are not valid - and that includes question marks. For consistency across YourTrees, when we import your dates we will store 2 digit day numbers and uppercase month names in the database, although for **display** purposes we may omit the leading zero and not use uppercase for the month name.

However, genealogy dates are not always precise and if question marks are not allowed, how do you describe a date that is uncertain? The answer is GEDCOM date modifiers.

GEDCOM date modifiers

The strict date elements DD MON YYYY are accompanied by a set of equally strict but very flexible ways that you can modify a date to handle uncertainty. These consist of a three or four letter prefix and sometimes an operator (and or to). They are:

ABT	About: used when the exact date is unknown and you have no other reference dates
AFT	After: used when the exact date is unknown but clearly follows a known date e.g. death date is known but burial is not
BEF	Before: when the exact date is unknown but clearly precedes a known date e.g. burial date is known but death is not
BET … AND	Between … and: used when the exact data of a **one-off** event is unknown but falls within a range e.g. died BET JAN 1850 AND MAR 1850 (Note: it is NOT BET JAN AND MAR 1850 – the date expressions either side of the AND operator must be valid in their own right)
CAL	Calculated: used when a date is calculated from two other known dates e.g. A date of birth is calculated from ages given in a Census form
EST	Estimated: used to extrapolate a date based on another event e.g. a parent's birth date based on the birth date of their first child
FROM … TO	Similar to BET … AND but used to indicate a date range for a **continuous** event (occupation, residence, etc). You can omit either element. Thus, FROM AUG 1950 is valid and so is TO AUG 1952. (Note: When both elements are present, both date must be valid in their own right)
INT	Interpreted (rare): used when a date is derived from a phrase e.g. "Michaelmas Day 1850"). It is easy to work out when such dates in a given year using an internet search so it is easier to enter the specific date without a modifier.

Some genealogy programs have developed other modifiers such as OR, Circa and SAY. These are proprietary formats and are not part of the GEDCOM standard. They will not transfer correctly to another program and should be avoided[2].

It can be difficult to remember the distinction between ABT, EST and CAL because they have similar functions. It is important to not get bogged down in these distinctions. If you use any one of them, it is a sufficient clue for most people to know that your date is not definite. ABT is probably the most versatile option.

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[2] Circa is another way of saying About, and SAY is another way of saying Estimated. OR is the only one that has any merit but it is not part of the GEDCOM standard and should be handled by adding an EST modifier to one of the dates and recording the other in a note to the date field.

And that is it for dates - nothing else is valid. This means that British Quarter dates (Q1, Q2, Q3, Q4) should not be used (instead, use BET … AND) and dual dating is also out (instead, choose one and put the other in a note field attached to the date). If it is not a DD MON YYYY date on its own or with one of the modifiers listed above, it does not belong in a date field.

Correctly formatted dates mean that your data can be faithfully exchanged across family tree programs with no misinterpretation. They also have an important privacy-related function - when a GEDCOM file is imported to another program, such as when we import a member's tree to YourTrees, the import program can check the dates to make sure details of living people are hidden from public view.

Dates and the GEDCOM converter

Correcting dates manually could be a big job but the GEDCOM converter that has been developed as a utility for YourTrees can handle many of them. For consistency across all trees we will apply the GEDCOM converter to all submitted GEDCOM files

For more information about how this works and how to access the service see
Chapter 7: The GEDCOM converter

Chapter 4: Place names

Recording place names

This chapter deals with places, which accounted for 25% of the total number of queries that we found when we analysed the initial submissions to YourTrees. However, before we look at place name formats, we will look at abbreviations, because they have a big influence on address recording.

Abbreviations

Abbreviations fall into two broad types:
1. Word abbreviations
2. Abbreviation by omission

Word abbreviations

When our audience is ourself we can take as many shortcuts as we like to record our data. But if our data is to be useful to others, we have to record it in a way that is meaningful to them. For example, British county names have abbreviations that range from obvious to obscure and there is a lack of consistency. Berks is Berkshire but Beds is not Bedshire, Hants is Hampshire but Northants is Northamptonshire, Middx is Middlesex, Oxon is Oxfordshire whilst the delightfully obscure Salop is Shropshire. This may be intuitive to Brits but we should spare a thought for researchers from overseas - abbreviations are only helpful if your audience knows the key to the code. It does not take much longer to write Berkshire so please avoid abbreviations.

There are a few exceptions:
- USA (not US) is accepted universally

- St is accepted for 'Saint' (but not 'Street')

  - e.g. St John's Church, Church Street

Not

- ○ St John's Church, Church St
- Ss is accepted for 'Saints'

Chapman Codes

Chapman codes are an extreme example of place name abbreviation. Devised by Dr Colin Chapman in the 1970s, they allow you to record British county names using three letter codes. In the days before personal computers these would have been a real time saver when it came to recording and indexing records. The problem is that in reducing everything to three letters, compromises had to be made, which effectively rendered the codes arbitrary and inconsistent.

For example BRK = Berkshire – the vowel is omitted. On that basis Cornwall should be CRN but it is CON. If we kept the vowel this time, why is it not COR? Because COR is County Cork in Ireland which is not a British county. If you Google 'COR' you will not find an explanation of the Chapman code in the first five pages of results – how many of us have the patience to go as far as page six?

If you use and value Chapman Codes by all means continue to use them, but when we import your tree to YourTrees the GEDCOM converter will change them to their full name, and we will add the country too.

Abbreviation by omission

As I said in the General Principles chapter, if I record the burial place of one of my ancestors as *Fyfield*, I know that I mean *St Nicholas Church, Netherton Road, Fyfield, Berkshire, England.* Inference is a powerful tool – for me. But others cannot be expected to share my insights.

Omitting elements of a place name may speed up record entry but will create the possibility of confusion for others. Place names must be given in full and should include the country name for the simple reason that so many British place names were adopted

by early settlers to the USA, Canada, Australia etc. There are eleven Berkshires in the USA alone and there are two New Yorks in England.

This applies to everyone though. USA state names should be given in full, not with the two letter codes mandated by the US Post Office. Also it is Orange County, not Orange Co.

Address format

Structured address formats are commonplace in modern life. You only have to purchase something online to encounter something like this:

Address Line 1:*

Address Line 2:

Town/City:*

Country:*

-- Select Country --

State/Province/UK County:*

Zip/Postal Code:*

However, structured addresses are a relatively modern invention, mostly for the benefit of the postal authorities - to make it easier to route mail - with the address format varying according to the requirements of each country's postal authority. Many of our records predate the postal service and cover multiple countries so we need a different approach.

The GEDCOM place format uses an unstructured, single-line, free text format:

St Nicholas Church, Netherton Road, Fyfield, Berkshire, England

It is a little-endian format which progresses from smallest to largest units, just like we saw with dates. It is a very flexible format and you can use as many segments as you need to express an address correctly and fully.

Zip/postcodes should be excluded. Again, they were invented for the benefit of the postal authorities and they did not exist before the late 1960s, at least not outside large cities.

Countries of the UK

Great Britain did not exist before the Act of Union in 1706/7 and the UK until the Act of Union in 1800/1. Our records probably span those events so usng 'UK' is not accurate.

The countries of the UK are nation states so it is best to use the national names - they transcend all acts of union:

- England

- Northern Ireland (Ireland prior to 1921)

- Scotland

- Wales

The effect of county boundary changes

How should we record places where boundary changes have happened? There have been a number of these over the centuries and in Berkshire's case the most notable took place in 1974 when large parts of the northern section were annexed to Oxfordshire, although we made some small gains in Caversham and Slough.

4. Places

We are recording historical events (facts) so it makes sense that we should use the contemporaneous address from the historical document. If this means you end up with two address records for the same place, for pre- and post-1974 events (facts), so be it. If you want to record the alternate address, add a note to the address record.

Some family history programs try to force you to use modern place names and will flag, for example, *Fyfield, Berkshire* as an error. They do this because they want to resolve the address to a GPS location and create map markers - and they cannot do that with historic addresses. If you like to see your events on a map, the workaround is to accept the modern name suggestion so the pin can be located, but then edit the name back to the old version. That usually works. Once a place name has been geocoded, the GPS data will be transferred to YourTrees via the GEDCOM file and all facts associated with that place name will be plotted on a map in the individual's record but with the historic name.

Place name fields are for place names

A surprising number of place name records in YourTrees contain information that is not place name related, such as occupations, dates of birth and ages. This is important information that needs to be recorded, just not in a place name field.

If you want to record that someone was an agricultural labourer in Tubney in 1831, you need to break that down:

1. It is an OCCupation event or fact so create an OCCupation event

2. In the appropriate fields on the event record add the:

    a. Date

    b. Place

That way your data will be structured in such a way that it can be freely exchanged with other programs using a GEDCOM file. It will populate the target application's fields correctly and will allow people who are looking for data in your tree to find it more easily.

This way you will build a set of records that are of maximum use to your descendants – after all is not that what it is all about?

Chapter 5: Names

Recording names

In this chapter we will look at peoples' names, which accounted for 14% of queries in the analysis that was carried out on the first four months' submissions to YourTrees

What is in a name?

You would think this would be easy right? First name(s), last name, title. Job done. Well, not quite, because there are many other facets to a name. Nicknames are just one example. There is a dedicated field for them but how many of us use it, or do we just say 'Frank William "Nobby" Clarke'? How do we handle names with alternate spellings? Suppose someone changes their name? How do we record the birth names of married women? Should we capitalise last names?

If we break down a name into its component parts and match them to the fields in most family history programs (and in GEDCOM files), we get:

- Title
  - used for royals and members of the nobility - lords, earls, marquis, dukes etc

- Prefix
  - includes Sir, Rev, Dr, military ranks etc

- First/Given name(s)

- Nickname

- Last/Surname

- Suffix

- ○ Qualifications and awards

- Gender

  - ○ it is important anyway, but especially so when unisex names are used, such as Alex (which might not be a diminutive), or for same-sex parents.

- AKA (Alias)

  - ○ do not confuse AKA with Nickname - AKA is for alternative names and is entered as a separate event (fact)

If your family history program provides those fields, you should use them, instead of putting all the information in a single name field. Remember our mantra "A place for everything, and everything in its place."

Capitalisation

How you enter last names is your choice but there is an informal and popular convention to capitalise last names. It helps distinguish names such as "Spencer" and "George" which can be used as first or last names. Indeed, I once worked with someone called Spencer George. Your family tree program may have a "force uppercase" setting for last names, or it may have a conversion facility. But when importing to YourTrees we will automatically convert all last names to uppercase so that there is a consistent presentation across all trees.

Variant spellings

This is probably the single most taxing part of recording ancestral names. William Shakespeare used many variations of his name and none was the version we use today. Standardised spellings are a fairly recent phenomenon. Then we have the complication of errors in the official record caused by the original scribe or their transcribers. The net result is that most of the variations there have ever been are baked into the official record.

For example, Barrett can be spelled with one or two r's, the second vowel can be a, e, i, or o, there can be one or two t's and an optional final e. That is about thirty two permutations and one way of presenting that is:

Bar(r)(a,e,i,o)t (t)(e)

... but that is cumbersome, unreadable and would play havoc with search algorithms. This popular method is not quite so problematic but is still unnecessary.

Barrett/Barratt/Barrit

A name should be recorded based on the documentary evidence at birth. Later changes could be recorded as alternate name facts in the person's facts timeline in your family history program. You might decide to not record every variant that you find documented for one person - it depends how faithful you want to be to the documented records. Whatever you do, it is important you keep the name field 'clean' and uncluttered.

Searching for names

Another reason for recording names in an uncluttered way is that computer search algorithms are capable of 'fuzzy' searches to find similar sounding names. You will probably see a check box next to the name entry box on websites like Ancestry or Findmypast that says something like:

☐ include variants

YourTrees uses fuzzy search by default although if you want to search for an exact match you can do that too. This makes the convoluted methods for recording names unnecessary.

Married women's names

Women should be recorded using their birth name because a woman should be identifiable as a member of her parent's family unit, and that is best achieved by using her birth name on her main record. She will form a separate family unit with her spouse.

Some people use the convention ...

<div align="center">

Barrett neé Howell

</div>

... but this will result in indexing and search issues and should be avoided.

Interestingly, there is no convention that a name-change fact should be recorded if a woman does adopt her spouse's name, or rather if either partner adopts the other's name.

Other name changes

If both parties assume a double barreled name on marriage, they should both have a name change fact recorded. Their birth names remain unchanged but any children would have the double-barreled name from birth if that is what appears on their birth certificate.

The key is to follow what is on the contemporaneous documentation. There are few circumstances in which a name change is retrospective, the most notable being when gender recognition certificates are involved, but that is a very rare case.

Whether it is necessary to record a name-change fact for name variations on, for example, a census form is open to debate. Bearing in mind that many illiterate people may not have known the spelling of the name on their birth certificate, may have assumed a spouse's name, may be misunderstood by the enumerator or the entry mistranscribed, the reasons for a name change may have nothing to do with any intent

on the part of the individual concerned. The men in my family have an unusual forename, 'Ferberd', and the florid hand of an enumerator led to a transcription in the 1911 census being rendered as 'Gerberd'. I did not record that as an alternate name - but I did report the incorrect transcription.

Unknown names

Regrettably one of the most common causes of this is women whose maiden name was not recorded on the occasion of her marriage. This can cause problems because it was not uncommon for daughters to be named for their mother in successive generations. When that name is common across many families, it adds to the confusion. My tree has any number of entries for Ann with no last name and it is hard to assimilate a long list of identically named people. What is the best way to record them?

There is no standard for this. Anything is better than an empty field because that could just as easily mean you forgot to enter a name. Some people use LNU or FNU for last/first name unknown, some use various combinations of —?— while others use five underscores. But all of these fill the index with rather unhelpful entries. In the case of married women with no recorded birth name, my own approach is to use, for example "**Smith [spouse's name]**" because this does at least keep her close to her spouse in the index. If I subsequently discover her birth name I will update the record.

There is no right answer to this and YourTrees will accept whatever convention you have used.

No names at all

There is no point creating records with no first and last names. If we know nothing about them, there is nothing to record. You do not need an unnamed second parent to be able to add the children - all software programs will allow you to create a family unit with only a single parent. Obviously we can infer the presence of a second parent.

Name fields are for names

It seems an obvious thing to say but remember our mantra "A place for everything and everything in its place."

A surprising number of name records in YourTrees contain information that is not name related, such as 'daughter', 'son' or 'child.' That relationship can be inferred from the person's place in the hierarchy of the family unit and the gender attached to them. YourTrees even has a record where the first name is recorded as *"appears never to have married"*!

There is a crib sheet on names that will help you build a set of records that are of maximum use to your descendants.

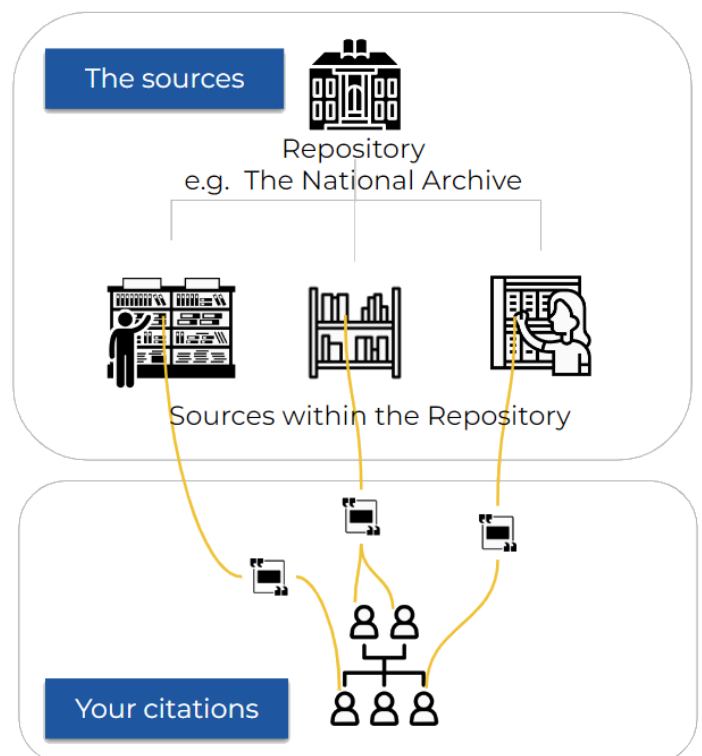*By Hilary Waller, ed Paul Barrett*

Chapter 6: Citations

The importance of citations

Citations provide substantiation of a claim. For example, Paul can confidently state "Ellen RICHINGS was born 18 Nov 1844" because she is his 2 x great grandmother and he has a copy of her birth certificate. But to anyone else that is a matter of opinion. Some may treat his opinion as probable while others may not.

If we add evidence by quoting the entries from the register of BMDs, the facts can be verified by others – they can validate the sources we used without having to carry out register searches of their own from scratch.

There are specific fields in family tree programs where you can record details of:

- Repositories – facilities where the original documents are stored. For example the National Archive at Kew

- Sources – these usually describe where the information was found in the repository (e.g. a book or a census)

- Citations – references to source records, made with the intent of proving the veracity of some piece

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of information. The citation is the link between the person and the source.

If you use a service such as Ancestry™ and synchronise it with a local program such as Family Tree Maker™ you are fortunate, because if you connect a record from their repository to one of your relatives, they will pass the citation details to FTM in the background without you needing to do anything. This facility exists with other online services and local apps and you should check what is available for the local program you use because it is a real time saver, and ensures a completely accurate reference is made to the source. When you export your tree to GEDCOM to upload it to YourTrees those citations will be included without any effort on your part.

What makes a good citation?

A good citation has seven components:

1. Record Type

2. Country

3. Location

4. Date

5. Name

6. Record Reference

7. Website or Source

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Here is an example

e.g. REQUIRED CITATION for a CIVIL REGISTRATION BIRTH INDEX

Births (England & Wales) District: Carlisle. Q3 1837. CASHLEY, James. Volume 25. Page 39. https://www.freebmd.org.uk

Record Type = Births

Country = (England & Wales)

Location = District: Carlisle

Date = Q3 1837

Name = CASHLEY, James

Record References = Volume 25. Page 39

Website or Source = https://www.freebmd.org.uk

Or in full e.g.
https://www.freebmd.org.uk/cgi/information.pl?r=11573:7319&d=bmd_1651523703

1. The Record Type for Civil Registration Indexes will alter according to whether it is for a Birth, Marriage or Death record.

2. There is a combined system for England & Wales but Scotland and N.I. have their own systems.

3. For Civil Registration records, the Location is the name of the Registration District.

4. The date format here relates to the quarters used by the UK General Register Office.

   a. You will be recording that in a free text information field that is used to transcribe the source so you should use Q3 1837

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    b. BUT This citation is linked to a person's Birth date and on THAT you MUST record it in GEDCOM format. In this case it would be BET JUL 1837 AND SEP 1837

5. 'SURNAME, First Name' please and for a Marriage, Groom followed by the Bride.

6. Copy the Record References from the website where you found the record.

7. Strictly you would give the homepage address of the website NOT the page URL of the record, as the latter are not guaranteed to be stable and hence may not work in the future for anyone else trying to locate the record.

    a. BUT, Paul thinks that there is nothing wrong with providing the full address:

        i. True there is no GUARANTEE it will work in the future, but it may well do, so what harm is there in providing it? Especially as ....

        ii. ... the full address has the home page reference at the beginning so you can still see it and ...

        iii. ... if a site cannot direct you to the specific link because it is no longer valid it will probably take you to the home page anyway, because they want you to stay on their site.

    b. It is a personal choice. Use whichever method suits you.

Citing other record types

The above format can work for other record types:

PARISH RECORDS for a Baptism

6: Citations

By Hilary Waller, ed Paul Barrett

This is very similar to the birth registration but Parish Records are identified by Country, Place and County. Instead of a Volume and Page number, this time the record reference is the film number quoted for that record on the website.

> Baptisms (England). Chelsea, Middlesex. 13 Mar 1840. CUSHLEY, Jane. Film. 2214587. Ref. 319. www.ancestry.co.uk

CENSUS RECORD

This again is similar but you will usually find that the Record References given on Ancestry are fuller than those given on FindmyPast[3]. If it is a Scottish record then they will have a different format. The standard rule is just copy what is there.

> Censuses (England). District: Islington, London. 1881. CASHLEY, John. ED 21. Piece 230. Folio 40. Page 10. www.ancestry.co.uk

BURIAL RECORD

> Burials (England). Henley Road, Reading (Caversham), Berkshire. 1 Dec 1961. CASHLEY, Charlotte. BerksFHS Burials 13th Edition.

OTHER RECORDS

This is where it gets harder but please do your best to work with the given framework.

Here are two examples, firstly for a newspaper and secondly for a personal conversation.

---

[3] And if you are syncing Ancestry to FTM, Ancestry will do all the work for you anyway

By Hilary Waller, ed Paul Barrett

Newspapers (England). Newcastle Guardian and Tyne Mercury 22 July 1854. Marriages. CASHLEY, Peter and LAMMOND, Jane. Page 8.
www.findmypast.co.uk

Brown, Gordon. (2022) Conversation with Felix Sadler, 18 February. Re: WW2 service record of Brian Sadler, gunner with 2nd Air Division based in Wymondham, Norfolk, England.

There will be others, perhaps even from a family bible but you do please need to record something against each item of data. This will then be of enormous help to your descendants when they pick up and continue with your research or to anyone else who wants to check if they have the same person in their own tree.

Entering citations into your own system

Citations are probably the most variable piece of functionality in the various Family Tree programs.

Here is an example from Family Tree Maker™

6: Citations

By Hilary Waller, ed Paul Barrett

If you need help working out what to do in the program you use, Berks FHS members should head over to the forum where we have a dedicated section for YourTrees. Post your question and one of our expert users for each package and/or website who have volunteered to answer your questions will let you know what to do.

We suggest that you practise using this method on a small section of your tree, which you then upload to check if it then looks the same in YourTrees as on your system. Here is an example of an entry in YourTrees. The Census entry shows a footnote number, and the cited source appears at the bottom of the record cross referenced by that footnote number.

6: Citations

By Hilary Waller, ed Paul Barrett

Compare that to the FTM example and you will see that it is almost identical.

> Censuses (England). District: Islington, London. 1881. CASHLEY, John. ED 21.
> Piece 230. Folio 40. Page 10. www.ancestry.co.uk

A person's record can have as many citations as it needs. You can never have too many citations.

Citations transform our trees by converting anecdote to evidence

Chapter 7: The GEDCOM Converter

As family trees have been submitted we have analysed them to look for recurring and new trends in data entry practices. These have enabled us to develop a GEDCOM conversion utility that the YourTrees administrators will apply to all incoming trees to deal with some of the more common issues.

This utility can find and modify thousands of entries in a few seconds - work that would be a huge manual effort. There are some entries that have no discernible pattern but if we deal with those that can be automated, sorting out the remaining few manually is an achievable task.

The corrections we make

- Chapman codes replaced by the full county and country

- Full month names replaced by their three letter versions

- Fixes FTM's incorrect tag name for AKAs

- Corrects your computer's local media file paths to the ones we use on the server (if you are including media in your submission to YourTrees)

- Change all media file extensions to JPG to match the format that we will be supporting in YourTrees (if you are including media in your submission to YourTrees)

- Remove all ordinals (st, nd, rd, th) from dates in date fields

- Change all long form or incorrect GEDCOM modifiers such as 'About' and 'Between' to their correct form

- Convert British Quarter dates to GEDCOM format

- Strip extraneous text from date fields

- Change unsupported modifiers such as SAY, Circa, Ca, C, C., to ABT

- Correct dual dates such as 1725/1726

- Remove question marks from dates and convert date to ABT date

- Remove occurrences of OR (which is not a valid modifier) and replace them with an ABT date

What happens to the corrected tree?

The converter is applied to all incoming trees as a matter of course and will be retrospectively applied to existing trees when time permits but that will only affect the copy we hold. Your source tree will remain unchanged.

Boomerang Trees to update existing data

There is absolutely no reason why you cannot have the revised tree sent back to you in what we have dubbed a Boomerang Tree. This service comes with a few conditions that you need to be aware of:

1. If you want a Boomerang Tree you need to specifically request it when you submit your GEDCOM by checking the box on the submission form.

2. When you receive your Boomerang Tree you must import it into a NEW tree in your family history program. You must not import it into your main tree without verifying it in a separate tree[4].

3. Creating a separate tree will enable you to compare records from the two to satisfy yourself that the corrections are acceptable. Only once you have done this should you consider importing the data into your main tree.

4. Before you import it to your main tree, make sure you take a backup of your data using your program's native backup facility to an external data device such as a

---

[4] We do our best to correct anomalies but please understand that we manipulate huge amounts of data. We have processed GEDCOM files with nearly 1 million rows of data. We cannot guarantee the process to be flawless

USB stick so that you can restore the data should a problem arise. Do NOT skip this step – we cannot help you if you do.

5. A Boomerang Tree is a corrected version of a snapshot you took of your tree when you submitted it to YourTrees. Any changes to your tree on your local copy after that submission will not be present in the Boomerang Tree and will be overwritten if you import it to your main tree

Chapter 8: Media

YourTrees supports media files so that your online tree can include images of people and documents to enrich the data

How do you upload your media?

Media has to be uploaded separately from your GEDCOM file because the GEDCOM file format does not support media. But it **can** tell us which image applies to which person so we can link them.

What file types can you upload?

1. We accept all common media and document types. Rarer file types will be dealt with on a case by case basis, although we cannot guarantee to support them.

2. We will not accept any executable files, including self-running video files.

3. We will flatten any folder structure to a single user-specific folder.

    a. If you have files with identical names in different folders, the duplicates will be discarded.

4. All images will be compressed/converted for web viewing.

How to proceed

How you proceed depends on where your media files are located on your computer. Use this table to guide you to the correct procedure to follow

Option	Where are your files located?	Action to take
A	**all** your files are in a set of subfolders inside your family tree program's folders	

Option	Where are your files located?		Action to take
	OR		Easy - you can upload them directly from there
	all your files are in your computer's generic media library **and** you have a dedicated subfolder for your family history media		
B	Your files are mixed in with your non-genealogy media in your computer's regular media folders		Use **Process 1** below to gather them all together then use **Option A**
C	You have no local files, they are all online with Ancestry, Findmypast etc		Use **Process 2** below to gather them all together then use **Option A**

Process 1

You need to create a **copy** of your tree that puts copies of the images in your family tree program's media folder. Your family tree program will have various methods for exporting/importing trees, including one to **transfer a file to another installation of the same program on another computer**.   We will exploit that functionality.

1. Export your tree **and its media** to an export file and then import that file back into your family tree program **into a separate tree**

2. You now have two trees and the new one is linked to a copy of the media, stored in your family tree program's library – the extraction work has been done for you.

3. Now you will create a GEDCOM export from this new tree, **making sure you select the option to include file/media links**, and upload the media from their new location, using **Option A** above.

If you are satisfied with the outcome on YourTrees you must decide what to do with the copy tree and media folder.

You could stick with the new version and use the new media location for all future media, in which case do not forget to delete the old version at some time. If you do this,

future exports to YourTrees will be easy because they will use the standard process (Option A).

Alternatively you might decide to stick with your original tree, in which case you should delete the new tree and its media folders, to conserve disk space and to ensure that you do not update the wrong copy by mistake BUT if you want to update YourTrees, you will have to use Option B again.

There are too many family tree programs for us to create a detailed 'how to' guide for each one but if you need help, use the forum to ask questions of our community or, if you belong to a forum or Facebook group for the software you use, ask there.

Process 2

If your tree is online then it will either be synchronised with a copy held on your computer, in which case use Option A above, or it is exclusively online – there is no local copy.

In the second case you need to install a local program that can sync to the cloud service, such as Family Tree Maker, which will sync to Ancestry or Family Search. The cloud service you use will have information on which desktop programs it synchronises with and how to set it up.

Once you have synced your tree locally, you will be able to use **Option A** above

Uploading your media

When you have organised your media you will upload them using a special upload link. How to do this is described on the Society website in the YourTrees > Members' area – 'SUBMIT YOUR MEDIA AND GEDCOM FILES"

Appendices

Appendix 1: Citations Crib Sheet

The description of where you have found a record i.e. the 'Source' is known as a 'Citation', for which many styles and formats exist. The most important thing that we need you to do is to provide enough detail about the record's source, so that someone could find it again.

FORMAT:

Record Type / Country / Location / Date / Name / Record References* / Website or Source

Copy these from the information shown on the website for the record.

EXAMPLES:

1. CIVIL REGISTRATION RECORDS for Births/Marriages/Deaths

    Births (England & Wales) District: Carlisle. Q3 1837. CASHLEY, James. Volume 25. Page 39. www.findmypast.co.uk

    OR *if you have a copy of the Registration Certificate.*

    Births (England & Wales) District: Carlisle. 29 Aug 1837. CASHLEY, James. Certificate held by Member.

2. PARISH RECORDS for Baptisms/Marriages/Burials

    Baptisms (England). Chelsea, Middlesex. 13 Mar 1840. CUSHLEY, Jane. Film 2214587. Ref. 319. www.ancestry.co.uk

    Burials (England). Henley Road, Reading (Caversham), Berkshire. 1 Dec 1961.. CASHLEY, Charlotte. BerksFHS Burials 13th Edition.

3. CENSUSES, including the 1939 Register

    Censuses (England). District: Islington, London. 1881. CASHLEY, John. ED 21. Piece 230. Folio 40. Page 10. www.ancestry.co.uk

    (Note: Not all censuses have the same style of references and FindmyPast tends not to include all of the details, so just copy what is there.)

4. OTHER

Newspapers (England). Newcastle Guardian and Tyne Mercury 22 Jul 1854. Marriages. CASHLEY, Peter and LAMMOND, Jane. Page 8. www.findmypast.co.uk

Brown, Gordon. (2022) Conversation with Felix Sadler, 18 Feb. Re: WW2 service record of Brian Sadler, gunner with 2nd Air Division based in Wymondham, Norfolk, England.

Q. Should I cite just the source's website homepage or should I give the full link to the record?

A.   Some authorities say you should quote just the home page because a full link is not guaranteed to work but that does not take account of the enormous help that a full link gives if it does work. Both of these links work but the second is more useful

https://www.freebmd.org.uk
https://www.freebmd.org.uk/cgi/information.pl?r=11573:7319&d=bmd_1651523703

Should the link NOT work, the home page link is shown at the start of the full link and so is easily discernible, and most sites will redirect you to the home page if a link is invalid.

A few of the websites auto-create Citations for you but in most Family Tree Software programs you have to create them yourself. These notes will then give you the format to follow.

As each program handles this in a different way, please ask for help if you need it, by posting questions on the YourTrees Forum. Our volunteer experts will then respond

Appendix 2: Data Entry Checklist

Principles

1. Build quality into your data from the start by ensuring you enter data properly.

2. Remember the mantra, **A place for everything and everything in its place** and only put data into a field that strictly belongs there - anything else will cause a malfunction of some kind

Names

☐ Use as many fields as your program provides to separate the elements of a name,

    ☐ Title (only for royalty and nobility)

    ☐ Prefix

    ☐ First names

    ☐ Nickname

    ☐ Last Name

    ☐ Suffix

Places

☐ Comma separated address from smallest to largest elements

    ☐ You can leave out elements starting from the smallest but not the other way round (see table on Place Names crib sheet)

☐ No abbreviations except St or Ss for Saint(s), and USA

☐ No post/zip codes

☐ Country must be given

Dates

☐ GEDCOM format is DD MON YYYY

    ☐ You may use MON YYYY or just YYYY but never DD or DD MON

☐ You may use date modifiers specified in the DATES crib Sheet

Citations

Remember: citations show that a fact is verifiable

Record Type / Country / Location / Date / Name / Record References* / Website
orSource

Appendix 3: Data Validation Crib Sheet

Intro

Data quality is something that we should embed in our family trees as we create them but we are only human and mistakes happen, so we have some tools to help you track down issues.

Assistance

If you need help with any aspect of this process, please post a question on the forum under the **YourTrees subforum**

Manual data validation

We've created a number of data validation reports you can use to analyse your tree in YourTrees for any issues so that you can correct them in your local tree. Create a new GEDCOM periodically as you correct them and you will see them disappear from the data validation reports

☐ Log on to YourTrees https://yourtrees.berksfhs.org.uk

☐ From the top menu select **Data Validation Reports**

☐ Click one of the reports to run it

    ☐ There will be a short delay whole the report is generated

☐ Use the drop down selector to select your tree from the list

Tree: [All Trees   ∨]

☐ This will filter the results to just your tree and you can click on the button to download the report to a CSV file that you can open in a spreadsheet. If you do not have Excel or Google Sheets, you can install **Libreoffice** for free on Windows and Mac.

Matches 1 to 46 of 46   **» Comma-delimited CSV file**

☐ Correct the entries in your local tree

☐ Send us a new GEDCOM file so we can update YourTrees

☐ When we notify you we have processed the updated tree, repeat this process from the top and check the entries are now correct

Boomerang trees

The issues that we discover during the processing of your GEDCOM file are corrected so they prevent any issues with YourTrees - misplaced or incorrect data can make searches difficult and cause errors with e.g. date display and date calculations.

If you choose to move to a different family tree program, those issues might cause problems during the data transfer. They may even be causing problems in your current program.

You therefore have the option of requesting a Boomerang copy of the corrected GEDCOM file to be returned to you so you can use it to update your local tree.

- ☐ Create a GEDCOM file from your tree

    - ☐ Include the entire tree

    - ☐ Make sure that all options related to **including** data are selected

    - ☐ Make sure that all options related to **excluding** data are **not** selected

    - ☐ Regardless of whether you are including media files, make sure you select any option to **include media links**

        This will ensure that any local links to your media file are preserved when you import the corrected GEDCOM file

- ☐ Submit the GEDCOM file in the normal way but select the option for a Boomerang Tree

- ☐ We will send the revised file back to you

- ☐ **Before you import the revised file, you should backup your tree in your family tree program**

- ☐ Import the revised GEDCOM file into a **new tree. Do not under any circumstances import it into your existing tree**

    - ☐ Make sure all options to include incoming data are selected

    - ☐ Make sure that you select the option to **import media links**, if there is one

- ☐ On completion of the import you should have two trees, the original and the new.

- ☐ You a have decision to make about the two copies of the tree you now have

- ☐ Option one *(recommended)*: Once you have checked the new tree is OK, make this your new master and carry out any updates there. The tree will be set up correctly for future updates to YourTrees

- ☐ Option two: delete the new tree and use the original. If you choose this option you will have to repeat the export/import process to update YourTrees (not recommended)

- ☐ Whichever option you choose, we suggest you rename the unused tree to indicate it is the old one, to minimise the risk of updating the incorrect tree. You could delete the unused tree but it would be prudent to wait a while in case you discover a latent issue

Appendix 4: Dates Crib Sheet

GEDCOM Date format is **DD MON YYYY** e.g. **01 APR 1900**

- Use the first three letters of the month name

- You may omit the day, or the day and month e.g. **APR 1900** or just **1900 but never the other way**

- You may add GEDCOM modifiers in upper or sentence case e.g. **ABT** or **Abt**

- Translate Julian dates to Gregorian (put Julian date in a note[5])

Single date modifiers

- **ABT** for About e.g. **ABT 1900** - exact date is unknown and none of the following modifiers applies:

- **AFT** for After e.g. **AFT 06 APR 1900** - a date follows another, such as a burial date following a death

- **BEF** for Before e.g. **BEF 06 APR 1900** - a date precedes another, such as a birth date preceding a christening

- **CAL** for Calculated e.g. **CAL 1900** - infer a date from two or more other facts, such as a person being eleven years old on the 1911 Census

- **EST** for Estimated e.g. **EST 1900** - extrapolate a date from another, such as estimating the birth date of a parent from the birth date of their first child

- **FROM** e.g. **FROM APR 1900** - event such as residence occurs from a known start date up to an unknown end date (also see FROM … TO)

- **INT** for Interpreted e.g. **INT 29 SEP 1900** - derived from a date phrase such as 'Michaelmas Day 1900.' *INT is rare and you could enter this as a pure date without a modifier. Either way, you should add the actual date phrase as a separate note to the date.*

- **TO** e.g. **TO 1900** - an event such as residence occurs from an unknown start date up to a known end date (also see FROM … TO)

Date range modifiers

- **BET … AND** e.g. **BET APR 1900 AND JUN 1900** - one-off event such as birth occurs

---

[5] There are online conversion tools such as https://stevemorse.org/jcal/julian.html

sometime between two dates. **The classic use for this is to represent British quarter dates for entries in the BMD registers**

- **FROM ... TO** e.g. **FROM APR 1900 TO MAR 1901** - continuous event such as residence occurs from one date to another

If it is not mentioned on this sheet it does not belong in a date field

Quick Tips

Those were the rules. Each family tree program has its own spin on how to handle date entry to help the user. Some are more helpful than others. Here are some quick tips that we have identified

Family Historian (FH)

FH is very good at forcing the right syntax for date ranges but can produce strange results if you enter ? in a date. For example, 199?, which was intended to mean sometime in the 1990s was converted to the year 0199!

Family Tree Maker (FTM)

Ignore Invalid Date

FTM uses validation rules on date fields to prevent invalid date formats being used. However, you can override the warning message by clicking the **Ignore** button. **Please do not**, because that will force the invalid date into the GEDCOM file and it will not be recognised as a date by other programs, including YourTrees.
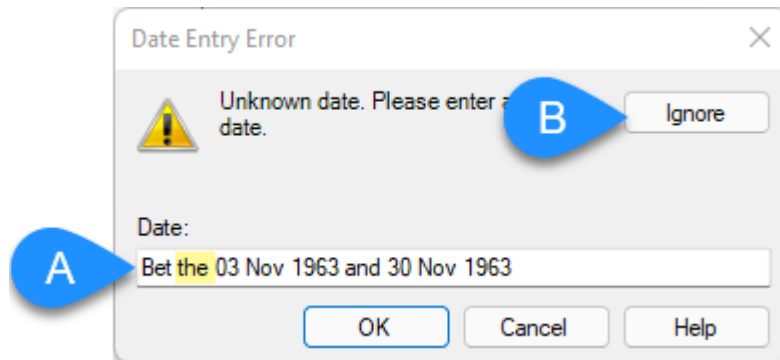
Circa and **c., SAY** and **OR** will be converted to **ABT**

Date ranges

It also handles date ranges incorrectly e.g. BET 03 NOV and 30 NOV 1963 is changed to BET 3 AND 30 NOV 1963. However, you can force it to the correct behaviour like this:

1. Enter the date range but deliberately make it invalid e.g. BET **the** 03 NOV 1963 and 30 NOV 1963 and press Enter

2. FTM will show an error box

a. Edit the text to remove 'the'

b. Press **Ignore**

3. This will force FTM to put the correct date into GEDCOM file exports

INTerpreted date modifier

FTM does not recognise the INT date modifier. We recommend you omit it and add a note in the description field with the date phrase from which you derived the actual date or date range

Rootsmagic 8 (RM)

RM does a great job of interpreting entered dates such as e.g. April 23rd, 1963 and converting them to e,g, 23 April 1963 as a displayed value while sending 23 APR 1963 to GEDCOM.

Appendix 5: Names Crib Sheet

Structure

In plain speak a name includes all titles and awards as a continuous phrase e.g.

Colonel Sir Jeremy "Jez" Fitzroy, FRCS

… and you could insert all of that into the name field on your family tree program

But family tree programs break a name down into constituent parts

- Title
    - royals and members of the nobility - lords, earls, marquis, dukes etc
- Prefix
    - includes Sir, Rev, Dr, military ranks etc
- First/Given name(s)
- Nickname
- Last/Surname
- Suffix
    - qualifications and awards
- Gender
- AKA (Alias)
    - do not confuse with Nickname - this is for alternative names and is entered as a separate event(fact)

.. and there is variation in how individual programs ask you to enter that data

Rules

There are a few rules

1. If we follow the principle, "a place for everything, and everything in its place", we should take advantage of the fields that our programs provide to separate the elements of a name

2. If part of a name is illegible, use an ellipsis to mark the characters "…"

3. Women's last names are entered as their birth name

4. Do not do this: 'Allisson/Alisson/Allison' or 'Al(l)is(s)on' etc

    a. Record the spelling at birth and use AKAs to record alternative spellings

Quick Tips

Those were the rules. Each family tree program has its own spin on how to handle name entry to help the user. Some are more helpful than others. Here are some quick tips that we have identified

Family Historian 7 (FH)

- FH allows you to enter a name as a single piece of text or in a more structured way - we recommend the latter.

    - If you DO choose to enter a single string, FH wll treat the final entry in the field as the last name, so an FRCS suffix would be interpreted as the last name. Beware!

    - If you only have a single name in the name field. FH will NOT treat it as a last name unless you enclose it in forward slash marks e.g. /Fitzroy/

- Our recommendations for FH name entry are shown below. We have included a view of how the FH data will be displayed in YourTrees
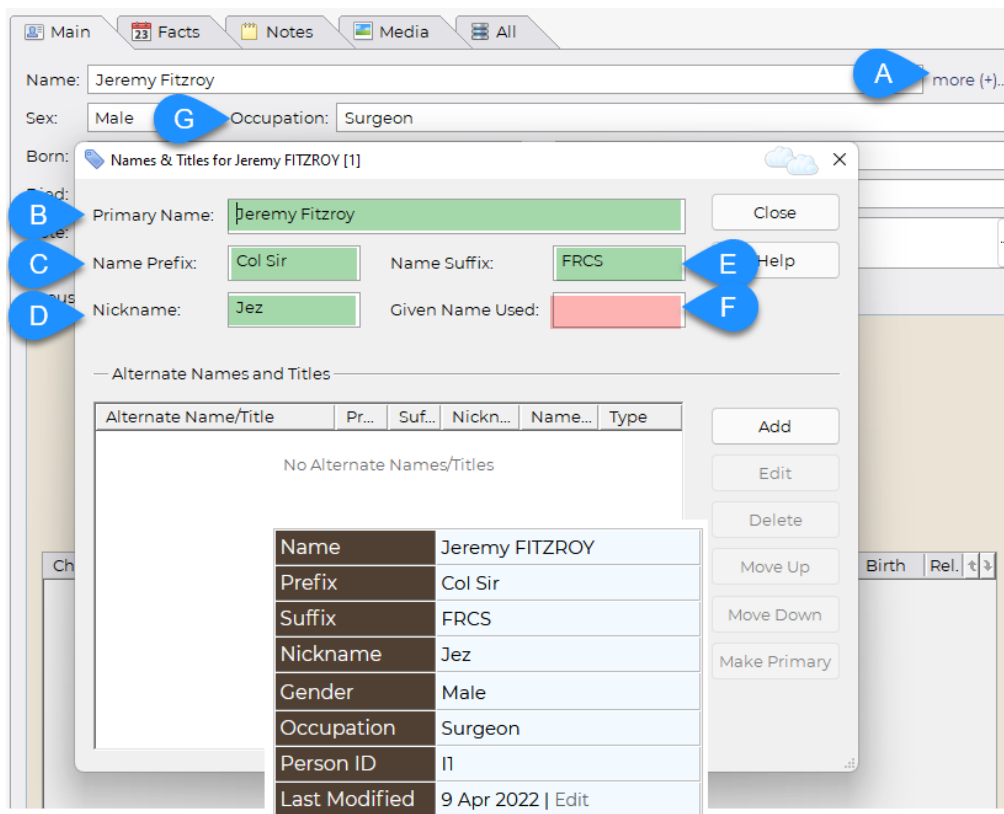
A. Click here to open the advanced data entry box

B. The Primary Name should contain the first and last names

    a. The final entry in the field will be assumed to be a last name, except

    b. If there is only one name in the field it will only be treated as a last name if you enclose it in forward slashes e.g. /George/

C. Add an optional prefix if applicable

D. Self explanatory

E. Self explanatory

F. The Given name used field seems to be unique to FH. It will not appear in YourTrees

    a. If you need to enter an alternative given name, use the alternate name area (see step C) and enter a name record.

G. FH provides an Occupation field as part of the main name record and exports ito GEDCOM as a OCCUpation event(fact), which is how it is shown in YourTrees

Family Tree Maker 2017 (FTM)

FTM has a very simple approach to names, and will, at most, allow given names, last name and suffix. This is an overly simplistic method that does not integrate well with other applications nor generate as useful a GEDCOM file, since Title, Prefix, Nickname and Given names are all condensed into a single field.
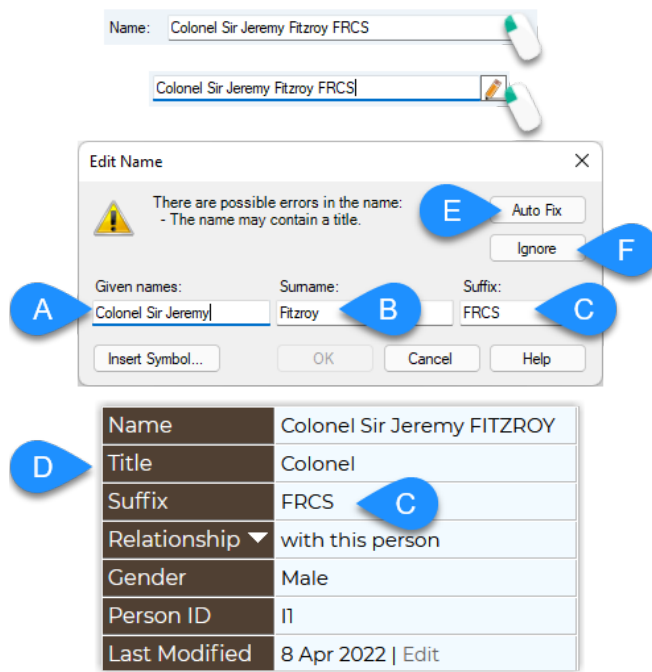
A. Titles have to be included in the Given Names.

B. The last name is correctly identified and passed to GEDCOM

C. Ditto the Suffix

D. But an unnecessary title is also included

E. FTM will flag this as an error but the fix it applies is worse than the problem so DO NOT press this option

F. Tell it to ignore

RootsMagic 8 (RM)

Overall, RM has a great data entry form for the elements of a name record

Add Person
Add a new unlinked person

●	Given	Jeremy
●	Surname	Fitzroy
●	Prefix	Col Sir
●	Suffix	FRCS
●	Nickname	Jez
●	Sex	Male

Birth

●	Date	between 3 November 1893 and 30 November 1893
	Place	

Chr

	Date	
	Place	

Death

●	Date	3 December 1963
	Place	
	Description	

Burial

	Date	
	Place	

Cremation

	Date	
	Place	

Customize Add Person screen   OK   Cancel

RM also complies closely with the GEDCOM standard, so the data will be transferred to YourTrees very accurately.

Name	Jeremy FITZROY
Prefix	Col Sir
Suffix	FRCS
Nickname	Jez
Born	Between 3 Nov 1893 and 30 Nov 1893
Gender	Male
Died	3 Dec 1963
Age	~ 70 years
Person ID	I3	RM Test
Last Modified	9 Apr 2022	Edit

Appendix 6: Notes Crib Sheet

Structure

Notes are text fields that can be attached to data fields to contain explanatory text e.g. you can explain a date related topic and relate it to the date field without placing the text inside the data field itself. For example a TIME of birth can be stated in a note attached to the birth date field.

Relating notes to the different data fields will result in the notes being displayed next to the appropriate data field in YourTrees.

Some programs call them 'notes', some 'description', some use both, and there may be other names for them too, depending on your family tree program.

Rules

Because they are free text fields there are no rules other than you must not put comments in data fields - they belong in notes/descriptions.

So Birth Date: **11 MAR 1901 @ 11:00** is not a valid date. Put **11 MAR 1901** in the date field and create a note to contain the time.

Appendix 7: Place Names Crib Sheet

Structure

A single row of data with comma separated elements with no post/zip code

<div align="center">e.g. 111 High Street, Anytown, Berkshire, England</div>

Rules

1. Additional elements for house names (in quotes) and districts etc may be included.

2. Always include the country - using UK nation state names, NOT UK, for UK addresses

3. No abbreviations - give the full name of every element be it street type, county, state, country

   a. St may be used for Saint but not for Street

   b. Ss may be used For Sants

   c. USA (not US) may be used for United States of America

4. Record British counties using the one in the historical record e.g. Abingdon was in Berkshire pre 1974 and Oxfordshire post 1974

5. You may omit elements, starting from the left but never the right

Valid places	Invalid places
High Street, Anytown, Berkshire, England	111 High Street, Anytown, Berkshire
Anytown, Berkshire, England	111 High Street, Anytown
Berkshire, England	111 High Street
England	111 High St

Suggestions

- If you want to record the modern equivalent as well as an historical place name, use a Note for the modern one
- If your family tree program allows you to assign a GPS map reference to a place, it is a good idea to do so, because YourTrees will then show related events (facts) on a

zoomable map in the person's record. However, do not let the app force you to use the modern place name at the expense of historical accuracy.

Quick Tips

Those were the rules. Each family tree program has its own spin on how to handle place entry to help the user. Some are more helpful than others. Here are some quick tips that we have identified.

Family Historian (FH)

FH allows you to enter a place as a comma separated row, as we described over the page. But then it separates the elements into Parts 1, 2 and 3. The first element goes in Part 1, the second element in Part 2 and everything else in Part 3, But this is regardless of the nature of the elements, so there is no equivalence between place records - some may start with a street, others with a town or county.

Part 1	Part 2	Part 3
☑ Iver	Buckinghamshire	England
☑ St John the Baptist	Royal Lane	Hillingdon, Middlesex, England

Family Tree Maker (FTM)

Family Tree Maker has a habit of enforcing the modern place name when you geocode a place NAME. But once the GPS has been added you can usually edit the name back to what you want.

Appendix 8: Upload Checklist

Remember: Upload often, to keep your backup as up-to-date as possible

Intro

This checklist will take you through the steps required to create a backup file to submit to YourTrees. It begins with the process of including media. This is an option that is available to you at no cost but is not obligatory.

We suggest you print a copy of this checklist each time you do an upload to YourTrees, and physically check off the boxes as you complete each step, to make sure you do not miss a vital one.

Assistance

If you need help with any aspect of this process, please post a question on the forum under the **YourTrees subforum**

Media (photos & documents)

If you are NOT including media with your submission to YourTrees you can skip to the next section - **Upload Family Tree (GEDCOM)**

Please note: media submitted to YourTrees will be compressed and reduced in size suitable for displaying through a web browser.

- ☐ Are the media files in your computer's general media library?

   - ☐ Yes: Are they in a dedicated family history folder?

      - ☐ Yes: you are all set to Upload them

      - ☐ No: They need to be moved into a separate area and we have a method for achieving that - see **Moving your media into a single folder**.[6]

   - ☐ No: If they are in your Family Tree program's media library you are all set to upload them

- ☐ **Upload** them

   - ☐ If you have a lot of images to upload:

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[6] You will need sufficient free disk space for a copy of your media, so if your computer is short of disk space you will need an external drive such as a USB thumb drive or HDD

- ☐ Make sure your laptop is charging so that the battery does not drain before the upload finishes

- ☐ If you can, please connect your computer with a cable, to get the fastest connection

☐ Disable sleep mode for the duration (if you have it enabled)

☐ Click **here** to go to the upload site.

- ☐ Enter the password obtainable from the main website

- ☐ In the **Your name** box, you **must** enter your last name and membership number **e.g. Smith_1234**. Please do not add or remove anything - just last name and membership number please, in the exact format shown in the example.

☐ Click the **add files** button

- ☐ In Windows File Explorer or Mac Finder, navigate to the parent folder which contains your family tree related files and subfolders.

- ☐ Open that folder to reveal the content

- ☐ **Check that you are definitely in the family tree media folder** - we do NOT want the entire contents of your computer or the entire content of your media library!

- ☐ **CHECK AGAIN!**

☐ In Windows Explorer do **Ctrl + A** to select all. In Mac finder it is **Cmd + A**. Then click **Open**

- ☐ This will create a file upload list

- ☐ **Check it and delete any that you do not want to be uploaded**

- ☐ Press the upload button

- ☐ Wait for the upload to complete.[7] **Do NOT close the window while the process is running. Do NOT shutdown your computer or allow it to go to sleep.** If the process is interrupted, you will have to start again.

Upload Family Tree (GEDCOM)

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[7] The time taken will depend on the speed of your internet connection, the number of images you send and whether or not you used a compressed file format.

- ☐ Create a GEDCOM file from your family tree program

    - ☐ Typically it is File > Export and then you will need to choose GEDCOM format.

        - ☐ If you are given a choice, GEDCOM version 5.5.1 is preferred, then 5.5 and earlier

    - ☐ Choose Entire file

    - ☐ Select your privacy options (these vary by program)

        - ☐ Include/Exclude living people is the most important setting

            - ☐ If you are confident all living people have a GEDCOM compliant date in the DOB field, you can include them, because YourTrees will automatically privatise them. *(recommended or your backup will be incomplete)*

            - ☐ If there is any doubt about the dates, choose the option to exclude or privatise living people.

    - ☐ If you are sending us media, make sure you check the option to include media file links in the export. Without them we cannot link the image files to the people.

    - ☐ Please save the file as Name_memb# e.g. **Smith_1234.ged**. Please do not vary this except if you are sending us multiple files for different branches, in which case add a suffix for the branch number e.g. **Smith_1234_1.ged, Smlth_1234_2.ged** etc

- ☐ Submit the GEDCOM file(s) via **this page** on the website

    - ☐ If you are including media, please make sure you check the **Media included** option in the GEDCOM submission form.

Moving your media into a single folder

We need to select only those images and documents that are related to your family tree so as to minimise the upload time and storage space. If your family tree media is:

a) Located in your general media folders

    AND

b) **not** segregated into a separate folder

… then we need to extract it into a new location inside your family tree program

To do this we will use a facility that exists in most family tree programs, that is designed to **move** your family tree to another computer.[8] We will use it to create a **separate** tree on your existing computer.

☐ Create an export file from your family tree program

　　☐ Choose the file format that relates to your family tree program e.g. if Exporting from Family Tree Maker, choose Family Tree Maker

　　☐ Choose Entire file

　　☐ Make sure that all options to **Include** items **are** checked and that any options to **Exclude** items **are not** checked

　　　　☐ In particular, **make sure any option to include media is checked.**

　　☐ Export the file.

　　At this stage you should have a file that includes all of your media

☐ Import the exported file **back into your family tree program**

　　☐ Make sure you import it to a **NEW** tree

　　☐ If you are given an option on where to locate the media files, **make sure you place them in your family tree program's media libra**ry

　　At this stage you will have two copies of your family tree. The original will be linked to your general media folders. The new one should be linked to the family tree programs media library but the content should otherwise be identical. The export/import process we just ran has extracted the images from your general media library, relocated copies of the media files and adjusted the links in your family tree. That could have taken weeks of effort to do manually

☐ Now you can run the standard process (see page 1)

☐ Separately, you a have decision to make about the two copies of the tree you now have

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[8] Not all family tree programs offer this facility. If yours does not we regret we are unable to accept your media, unless you are prepared to carry out a manual relinking process. If you would like to know more, please post a question on the YourTrees forum

- ☐ Option one *(recommended)*: Once you have checked the new tree is OK, make this your new master and carry out any updates there. The tree will be set up correctly for future updates

    - ☐ If you add any more media, make sure you select the option to place it in your **Family Trees program's** media library, **not** your general media library

- ☐ Option two: delete the new tree and use the original. If you choose this option you will have to repeat the export/import process to update YourTrees (not recommended)

- ☐ Whichever option you choose, we suggest you rename the unused tree to indicate it is the old one, to minimise the risk of updating the incorrect tree. You could delete the unused tree but it would be prudent to wait a while in case you discover a latent issue