

# My Family History Manual

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**Bruce E. Jacobson**

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# 1. INTRODUCTION

The purpose of this guide is to document how I collect, process, and present my family's history and to document procedures for my care of family keepsakes. I describe the major choices I've made about approach, style, and technique. It is to remind me of those choices, and to inform anyone who may acquire my research or my collection of family keepsakes.

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**genealogy** – Establishment of a pedigree by extracting evidence, from valid sources, of how one generation is connected to the next. (In essence, this means the discipline of the construction of a valid family tree.)

**family history** – A biographical study of a genealogically proven family and of the community and country in which they lived. (In essence, this means the writing of a biography of a series of related ancestors of common genealogy. Family history incorporates genealogy.)<sup>1</sup>

---

The New England Historic Genealogical Society posits there are two fundamental rules to genealogy. Rule #1: Work from the Known to the Unknown. Rule #2: Write It Down.<sup>2</sup> This aligns with my approach, which was to start by exploring and documenting the family manuscripts and objects in my possession. Eventually, I will record data from the myriad sources now available on the internet as well as some physical repositories.

Though genealogists look to events of the past, the approach is more confined than that employed by family historians. Family history incorporates genealogy and requires “a far wider and deeper type” of inquiry. “Family history cannot be written solely from the results of genealogical research.”<sup>3</sup> The historian explores context: the intra-personal, societal, economic, and political forces that influenced the lives of ancestors in small and large ways. The genealogist explores the who, what, when, and where; the historian considers the who, what, when, where—why, and how. My goals align with the historian.

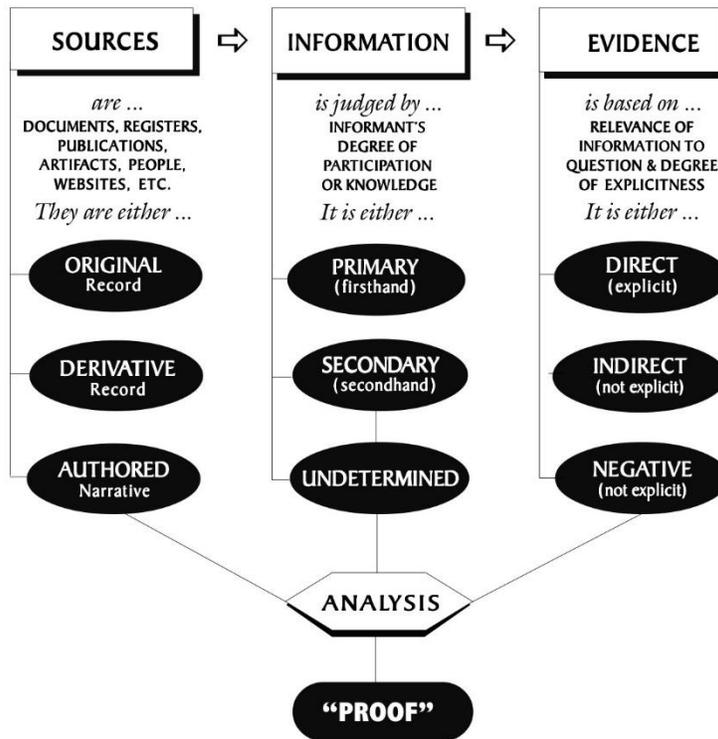
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<sup>1</sup> Society of Genealogists, “Hints & Tips Two: Genealogy or Family History? What’s the Difference?” at *National Family History Centre*, Home > Learn > Hints & Tips (<http://www.sog.org.uk/learn/education-sub-page-for-testing-navigation/guide-ten> : accessed 05 January 2020).

<sup>2</sup> Ann Lawthers, “Getting Started,” New England Historic Genealogical Society, at *American Ancestors* (<https://www.americanancestors.org/education/learning-resources/read/getting-started> : accessed 31 January 2019). I attended a three-session Building Your Genealogical Skills course in January 2019 that explored these two rules and other basics, conducted by New England Historic Genealogical Society Genealogist Ann Lawthers.

<sup>3</sup> Terrick V. H. FitzHugh, *How to Write a Family History* (London: Alpha Books, subsidiary of A. C. Black Ltd., 1988), p. x. The results of these broader goals can usefully fill narrative gaps in a written history when specific details of an individual's life are sparse, according to FitzHugh.

*Basic Principle:*  
**SOURCES provide INFORMATION**  
 from which we identify **EVIDENCE** for **ANALYSIS**.



©Copyright: Elizabeth Shown Mills, 2017

Figure 1-1: The Evidence Analysis process map.

Conference workshops and training courses inform my understanding of genealogy, especially Searching Sweden with Caroline Guntur.<sup>1</sup> Three publications also guide my choices regarding family history research and writing. *How to Write a Family History* by Terrick V. H. FitzHugh helped me make distinctions between genealogy and historiography.<sup>2</sup> I follow Mary Slawson's suggestions for recording genealogical data as presented in *Getting It Right*.<sup>3</sup> While dated, Slawson's work has guided many family researchers. When referencing genealogical information, I rely on *Evidence Explained* by Elizabeth Shown Mills.<sup>4</sup> Several of Mills' and

<sup>1</sup> Caroline Guntur, "Searching Sweden" at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com/courses/>; accessed 2021–2023); enrolled course.

<sup>2</sup> Terrick V. H. FitzHugh, *How to Write a Family History* (London: Alpha Books, subsidiary of A. C. Black Ltd., 1988).

<sup>3</sup> Mary H. Slawson, *Getting It Right: The Definitive Guide to Recording Family History* (Salt Lake City: Desert Book Co., 2002).

<sup>4</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017).

Slawson’s more common guidelines follow, along with deviations from their advice. The changes are primarily because I’ve tailored my style for use with various software, all in light of my family’s past. The Family Historian User Group (FHUG), a UK-based group of experienced users, helps with the use of my primary genealogy software.

Mills offers basic research reminders such as those summarized in Figure 1-1: namely, that **sources** provide **information** from which family historians identify **evidence** for **analysis**.<sup>1</sup> At first, I faithfully entered relevant information from sources in my Family Historian software without fully engaging in analysis. So, for example, I had more than one birth entry for my grandmother because the place of birth was presented differently in various sources. I’ve come to realize that my job is to record the variations, but then reach a conclusion—in the case of this example, settle on a single name for the birthplace (with variations noted).

I learned about the care of historical objects during my career with the National Park Service, and through general curiosity about the topic. I apply that knowledge to family materials in my possession. *How to Archive Family Keepsakes* by Denise May Lavnick is among the resources I look to for further guidance.<sup>2</sup>

## Family Defined

If I am to write a family history, who will I include? What is a **family**? One dictionary definition posits that a family consists “of one or more adults together with the children they care for.”<sup>3</sup> Single parents, same-sex couples, and other social arrangements would fit under this modern family umbrella. Not long ago the idea of an immediate family would have been restricted to a husband and wife and their offspring. Two hundred years ago the word meant “members of a household,” including any domestic staff.<sup>4</sup> Clearly, understanding of the concept of who constitutes a family changes.

Even now there are variants, as in this alternate dictionary definition for what could be described as an extended family: “any group of persons closely related by blood, such as parents, children, uncles, aunts, and cousins.”<sup>5</sup> There is no genealogical definition of family. This is notwithstanding that the Church of Jesus Christ of Latter-Day Saints and their FamilySearch editors who developed the standards for documenting genealogical information

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 12. Permission granted to reproduce for personal use.

<sup>2</sup> Denise May Lavnick, *How to Archive Family Keepsakes: Learn How to Preserve Family Photos, Memorabilia & Genealogy Records* (Cincinnati, Ohio: Family Tree Books, abt. 2012).

<sup>3</sup> Dictionary.com, LLC, “family” at *Dictionary.com* (<https://www.dictionary.com/browse/family> : accessed 27 December 2019).

<sup>4</sup> Terrick V. H. FitzHugh, *How to Write a Family History* (London: Alpha Books, subsidiary of A. C. Black Ltd., 1988), p. 85.

<sup>5</sup> Dictionary.com, LLC, “family” at *Dictionary.com* (<https://www.dictionary.com/browse/family> : accessed 27 December 2019).

electronically used a narrow definition of family and marriage. “That FamilySearch's definitions of marriage and family exclude gay and lesbian couples is not some accidental oversight. It's a deliberate restriction, one that FamilySearch has asserted multiple times.”<sup>1</sup> Fortunately, the specifications themselves (i.e., GEDCOM) are not bound by Family Search's definition; documenting couples and families as they are found and understood today is allowed. “Yet, genealogy must remain independent of present-day social mores while finding and recording facts. Genealogists cannot decide for their ancestors what kind [of] family they should have been, a genealogist must be satisfied to record the facts as they are.”<sup>2</sup> How will I approach family in my research and resulting narratives?

The classic approach would confine research to direct lineal ancestors. In other words, my parents, grandparents, great-grandparents, etc.—with the focus on my ancestors' (and ancestresses') male line. However, that approach would exclude people like “Guttie,” my grandaunt, who played a vital role in our family's past. Those not in the direct line of descent such as siblings, spouses and children of siblings, aunts, uncles, cousins, and others reveal information about direct ancestors. This information, both specific and contextual, can be important when telling the full story of their lives.

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**family** – any group of persons closely related by blood, such as parents, children, uncles, aunts, and cousins.

---

I have adopted the following approach. During research I gather information about my broader extended family, including all persons closely related by blood—and even others, if they figure prominently in my family's past. I also include facts of my own life. When presenting either a genealogical chart or a narrative history, I focus on my direct ancestors and use the extended data to fill in details about the main focus of that work.

My mother's ancestors have a British background, and my father's Swedish. Both social systems are patrilineal. (Though from the 1600s onward Swedish law gave women more property rights than in other European countries.<sup>3</sup>) I have adopted the norm of following the male line. This offers advantages when looking for documentation because the husband/father has been the historical breadwinner in European society. “His occupation decided the family's social status; his sons tended to be put to careers of the same standing; and the walk of life into

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<sup>1</sup> Tamura Jones, “Same-sex Marriage in GEDCOM” at *Modern Software Experience* (<https://www.tamurajones.net/SameSexMarriageInGEDCOM.xhtml> : last updated 21 April 2017; accessed 13 November 2021).

<sup>2</sup> Tamura Jones, “Family in Scientific Genealogy” at *Modern Software Experience* (<https://www.tamurajones.net/FamilyInScientificGenealogy.xhtml> : 19 October 2010).

<sup>3</sup> Maria Agren, *Domestic Secrets: Women & Property in Sweden, 1600-1857* (Chapel Hill: University of North Carolina Press, 2009), pp. 3–26.

which each generation was born was its most pervasive nurtural influence.”<sup>1</sup> Furthermore, British surnames typically pass from male to male. Surviving public records and other documentation most often follow the men in the family.

It is my practice to enter in Family Historian genealogy software (described in chapter 2: “Digital Genealogy”) biographical information that I find about my broader extended family. Among other attributes, it offers a straightforward way to view relationships that may exist between any two family members for whom data is entered. In addition, it can link to unrelated individuals who may have played a significant role in my ancestors’ past such as household members (including any domestic staff or farm laborers) and business partners. While biographical information may not be gathered for each associated person, Family Historian still provides for a one-way link from a family member along with a free-text description of the relationship.<sup>2</sup>

#### Finding relationships among extended family, Family Historian:

- Individuals Records Window: Select individuals > **Tools Menu**: How Related.
  - ◇ set number of relationships (up to 9).
  - ◇ uncheck Blood Relationships ONLY.
  - ◇ view summary (in small box).
  - ◇ view graphically.
  - ◇ view report.

#### Finding relationships of ‘root’ individual to extended family, Family Historian:

- Focus Window for an individual: **Tools Menu**: How Related.
  - ◇ view summary (in small box).
  - ◇ view graphically.
  - ◇ view report.

#### Linking unrelated individuals, Family Historian:

- Focus Window for an individual: **All Tab**
- > Right click on individual’s name (top line)
- > Add Field > Add Miscellaneous > Add Associated Person
- > Add Link to Individual Record

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<sup>1</sup> Terrick V. H. FitzHugh, *How to Write a Family History* (London: Alpha Books, subsidiary of A. C. Black Ltd., 1988), p. 18.

<sup>2</sup> Sarah Bell [sbell 95], “RE: Quick links to unrelated people,” at *FHUG Family Historian User Group, FHUG Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=22427> : posted 31 October 2023).

## Genealogical Resources

Documenting where information was found and how it was analyzed is key to any serious historiographic endeavor. Three levels of documentation are represented in Figure 1-2. A repository is a place where sources are stored. Examples are libraries, archives, local historical societies, museums, residences, and the internet. A **source** is a collection of records.

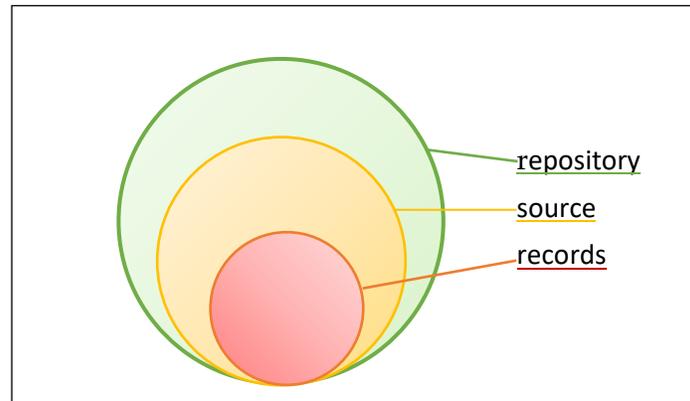


Figure 1-2: Source documentation model. (after A. Lawthers, 2019)

A source is usually created for a defined purpose by a single author or a single jurisdiction. The accepted standard for exchanging genealogical data (GEDCOM) defines source as “the initial or original material from which information was obtained.” A census, registry of births, probate packet, database, and headstone are sources. That is, each holds biographical information in the following records, respectively: single household entry, birth certificate, will, database entry, and inscription. A **record** is that portion of a source that contains biographical information. In this way, capturing where information was collected is more complex in family history than other work in the humanities and sciences: there are more layers. There are also many, many kinds including published and unpublished documents and manuscripts, people, videos, images, oral recordings, and objects and artifacts.

A full citation of where genealogical information was found includes details about where the record was in the source, about the source itself, and sometimes the repository. Knowing where I found information helps to analyze its veracity. It also helps me, and others, find the fact again. Elizabeth Mills states in *Evidence Explained* that while these tasks of providing proof for what we conclude and helping others find what we’ve consulted are valid,

they miss the most critical point of all: *We identify sources—and their strengths and weaknesses—so we can reach the most reliable conclusions.*<sup>1</sup>

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 8.

“She goes on to say that while other guides emphasize **output**, the purpose of *Evidence Explained* is to focus on **input**—what we need to record in the research phase.”<sup>1</sup> That is to say, precisely formatting the style of citations is less important than recording enough information to understand the source, and as a reminder of what’s been examined. It is a common misconception that *Evidence Explained*

sets out a prescriptive set of templates. It doesn’t; it sets out the principles for analysing [sic] and citing sources, and some models for source citations. Analysis of a source, including: what is it? where did I refer to it? was it the original or a derivative, and if a derivative, what is it a derivative of? And was that a derivative?....

Until you’re eyeballing a source, and have gone through the thinking, you don’t know what the structure of your citation will be. Often, if you’re lucky, it will fit one of the existing models. But if you’re dealing with a website that’s imaged a microfilm of an out-of-print published book of transcriptions of the Parish Registers of a Parish Church (said registers having been partly burned in a fire in the vestry and the transcriptions were made by the local antiquarian society from the remnants after the fire...) you’re not going to find a ready made model for that.<sup>2</sup>

## Source and Record

Use of the terms **source** and **record** is not precise in practice. Some genealogists use ‘source’ to include all three elements of a resource: repository, source, and record. In Family Historian (my genealogy software) a record is described as “an imaginary storage box” that holds data about an individual, a family, or a source. This is more a data management perspective than a genealogical one and, in this manual, I distinguish these from genealogical records by rendering them thus: RECORDS. Being aware of context also aids understanding. I like the following definition of record offered in *A Glossary of Archival and Records Terminology*.  
*Genealogical Records*

For family history, the essence of a record is biographical information. A record is the data taken from the line in a register or the inscription on a headstone—it’s the information rather than the form given to the information. A citation points to the genealogical record by documenting its properties, the source of which it is part, and sometimes the repository where it is located. (See Chapter 6: Note, Fact, Source, and Citation in Family Historian.)

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<sup>1</sup> Jmurphy, “RE: Evidence Explained Citations and Evidentia,” at *FHUG Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=16010#p86329> : accessed June 2018).

<sup>2</sup> Helen Wright [ColeValleyGirl], “Re: 'Free Form' Citation Entry capability” at *FHUG Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?p=141549#p141549> : posted 08 November 2023).

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**record** – Data or information that has been fixed on some medium; that has content, context, and structure; and that is used as an extension of human memory or to demonstrate accountability.<sup>1</sup>

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I was confused by the term **vital records** as commonly used in genealogy. Which life-changing events are included under the heading? Were they recorded by a government or by a church? There seemed to be no agreement, even though genealogists freely use the term. I was not alone. Tamura Jones succinctly states the confusion and suggests an alternative that distinguishes between records created by a government and those created by a church.<sup>2</sup> Thus, I use **civil and church records** when referring to birth and death certificates, marriage licenses and divorce decrees, civil union forms, adoption papers, and the like. **Civil** encompasses the genealogical records of all the operations or concerns of the government of a country; **church** relates to the records created by clergy or others engaged to keep records or accounts for a religious denomination. The adjective ‘clerical’ also denotes church genealogical records.

One professional geologist suggests that records fall into three categories based on what they are primarily about: nominal, material, and procedural.

**Nominal records** are essentially to do with people. They name the people they relate to—hence nominal. These are the records that genealogists devote most of their time to, and include births, marriages, deaths, census returns and various lists and directories.

**Material records** are to do with things. They record information about these things, and among that information may appear the names of people who are in some way associated with the things. These may be buildings parcels of land, cars, works of art, shareholdings and so on. They may provide valuable information about the people associated with them, and that may in turn help to flesh out aspects of the peoples’ lives and histories.

**Procedural records** are to do with procedures—events or activities or systems set up by us to help the smooth running of our society and businesses. Again, people get caught up with these and may be named. These happenings include court cases, accounts of football matches, records of purchases made from a company, payroll records that list the people receiving payment, and a multitude of other involvements. They, too, are valuable for family history purposes.<sup>3</sup>

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<sup>1</sup> Richard Pearce-Moses, “A Glossary of Archival and Records Terminology,” online database at *The Society of American Archivists* (<https://www2.archivists.org/glossary> : accessed 15 April 2019), search term: “record noun”, “record”, definition 2.

<sup>2</sup> Tamura Jones, “Vital Records in Traditional Genealogy,” at *Modern Software Experience* (<https://www.tamurajones.net/VitalRecordsInTraditionalGenealogy.xhtml> : posted 06 September 2009; accessed 20 January 2019).

<sup>3</sup> Ian G. Macdonald, *Referencing for Genealogists: Sources and Citation* (Stroud, Gloucestershire, UK: The History Press, 2018), 57.

### Source Categories

Genealogical sources hold records with biographical information about individuals and families. The world-wide FamilySearch organization groups sources into reference and genealogical, each with two subcategories: original and compiled. Original sources are specific to a person's life such as birth, marriage, immigration, military service, land purchases, and death. They were usually created near the time an event took place. Original sources can give primary information to identify relationships between individuals or about a specific event. They provide information not found in compiled sources and can verify the accuracy of compiled records.

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**source** – the physical form of a document holding genealogical records.

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Compiled genealogical sources differ in that they are “collections of information about a person, group, or family” that researchers and authors gathered from original and other compiled sources and records. Therefore, they “represent one or more researcher’s opinion of what the records say about an individual or family.”<sup>1</sup> Instead of FamilySearch’s ‘compiled,’ Mills calls out ‘derivative sources’ and ‘authored works,’ resulting in **original**, **derivative**, and **authored** genealogical sources.

I struggled with categorizing sources. I consulted dozens of resources, primarily relying on *Family Tree Magazine*,<sup>2</sup> *The Source*,<sup>3</sup> FamilySearch *Research Wiki*,<sup>4</sup> and the American Ancestors course *Getting Started*.<sup>5</sup> I finally realized that the long lists I was proposing were about the records’ creators and the type of information in the records. I was lacking a useful way to describe the containers—the **sources**—in which those **records** were held. Mills provides an answer: “Sources are classified according to their physical form.”

As mentioned above, Mills identifies three source categories to help analyze genealogical information (*See* Figure 1-1, page 1.2): original sources, derivative sources, and authored works. I designate an additional original source category. It is accepted practice that an image

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<sup>1</sup> FamilySearch International, “Identify a Category of Sources,” at *Research Wiki* (<https://www.familysearch.org/wiki/> : page last modified 20 September 2017).

<sup>2</sup> Sharon DeBartolo Carmack, “Genealogical Source Checklist,” *Family Tree Magazine*, online version, F+W Media (<https://www.familytreemagazine.com/premium/genealogical-source-checklist/> : 01 July 2008).

<sup>3</sup> Loretto Dennis Szucs and Sandra Hargreaves Luebking, ed., *The Source: A Guidebook of American Genealogy*, revised edition (Salt Lake City: Ancestry Inc., 1997).

<sup>4</sup> FamilySearch International, “Identify a Category of Sources,” at *Research Wiki* (<https://www.familysearch.org/wiki/> : page last modified 20 September 2017). FamilySearch International, “Resource Checklist,” at *Research Wiki* (<https://www.familysearch.org/wiki/> : page last modified 05 March 2018).

<sup>5</sup> Ann Lawthers, “Getting Started,” New England Historic Genealogical Society, at *American Ancestors* (<https://www.americanancestors.org/education/learning-resources/read/getting-started> : accessed 31 January 2019). I attended a three-session Building Your Genealogical Skills course in January 2019 that explored these two rules and other basics, conducted by New England Historic Genealogical Society Genealogist Ann Lawthers.

of a manuscript is considered original. However, in my Jacobson-Lindquist-Phillips Archives I have manuscripts that are one-of-a-kind originals, e.g., handwritten journals and letters on stationery. For those I've added a fourth category, **first-original**. In summary, my four categories of genealogical sources are as follows.

- 1) **First-original sources** – material in its first form regarding content and physical makeup that is in my possession. Examples: a bound journal with handwritten entries, letters, or a paper diploma carrying an embossed seal.
- 2) **Original sources** – material with content in its first oral or recorded form, which may be a digital copy. Examples from Mills: “the testimony of someone relating events that he or she personally experienced or witnessed; or an original document created by a party with firsthand knowledge of the information recorded.
- 3) **“Derivative sources** – material produced by copying an original or manipulating its content; e.g., abstracts, compilations, databases, extracts, transcripts, [and] translations....
- 4) **“Authored works** – a hybrid of both original and derivative materials, produced by writers who study many different sources, reach personal conclusions, and present a new and original piece of writing.”<sup>1</sup>

Having settled on the above four genealogical categories, what to do with the lists of record creators and types of citation information I identified? Are they useful too? Yes, as ways to report about and retrieve sources. These record characteristics serve as research aids: If I wish to find the records associated with a civil authority, for example, I can generate reports using my genealogy software. (See Table 6-1: Record Creator Types.)

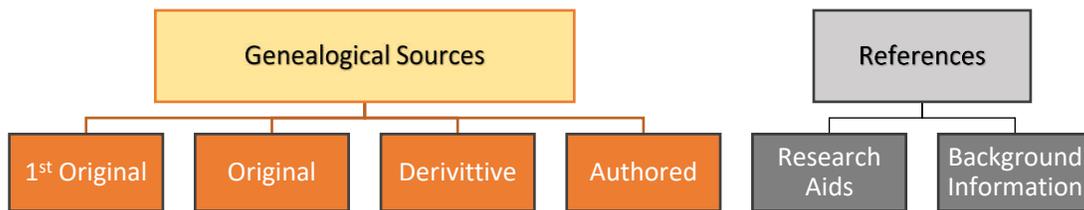


Figure 1-3: Four source categories.

### Fact

We casually refer to historical **facts** as though they were absolute. However, our understanding of the past evolves. Over time, with new evidence, facts may change. “In historical research, it is difficult to establish actual truths; therefore, the validity of any stated ‘fact’ rests upon the quality of the evidence to support it,” according to Mills.<sup>2</sup>

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 24.

<sup>2</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 18.

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**fact** – a presumed reality—an event, circumstance, or other detail that is considered to have happened or to be true.<sup>1</sup>

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The only facts that we as family historians can ‘know for a fact’ are those events in which we have personally participated (and then sometimes memory alters the facts). All the rest are assertions or claims or opinions, not facts. As Mills asserts, “facts do not speak for themselves. Facts are chameleons whose shape and color reflect their handlers.”<sup>2</sup> A family historian’s responsibility is to provide proof to support all claims of fact, and a large number of cited sources claiming the same fact is not sufficient evidence. The cited references could all be incorrect if blindly copied from one another. Consult Mills’ *Evidence Explained* for a more robust treatment of drawing conclusions from historical research.

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 823.

<sup>2</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 18.

## Reference Tools

**References** help me find and understand genealogical records. They may offer guidance for family history research—**research aids**—or provide **background information** about the political, social, economic, religious, and environmental context for identified ancestors. *See* Figure 1-3: Four Source Categories. I have adopted a filing protocol to distinguish references from genealogical records, which is described in the Document Folders section, chapter 5.

The following references are, or seem to be, particularly useful in my United States-, Britain-, and Sweden-based research. More specific research tips are offered in subsequent relevant sections of this document, e.g., Swedish Naming Practices. (I describe purely administrative files also in chapter 5.)

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### Genealogy research aids:

- ▶ “Cyndi’s List of Genealogy Sites on the Internet” by Cyndi Ingle:  
<https://cyndislist.com/>
- ▶ “A One-Step Portal for On-Line Genealogy” by Stephen P. Morse is good for passenger lists: <https://stevemorse.org/onestep/onestep3.htm>
- ▶ “Swedish Genealogy” at *ArkivDigital*: <https://www.arkivdigital.net/swedish-genealogy>
- ▶ “Sweden Genealogy” at *FamilySearch*:  
[https://www.familysearch.org/wiki/en/Sweden\\_Genealogy](https://www.familysearch.org/wiki/en/Sweden_Genealogy)
- ▶ “The Swedish Genealogy Guide” by Jeffrey Norris:  
<https://swedishgenealogyguide.com/>
  - ▶ “Learning Center: Reading Gothic Handwriting for Swedish Genealogy” (videos): <https://swedishgenealogyguide.com/learning-center>.
  - ▶ “Dictionaries:” <https://swedishgenealogyguide.com/dictionaries>
- ▶ “Transcribing and Translating Old Letters” (video) at enrolled course *Searching Sweden* by Caroline Guntur:  
<https://www.coursesbycaroline.com/courses/1171755/lectures/37109630>
- ▶ “Glossary of Genealogical Terms” at *Ancestry Support*:  
[https://support.ancestry.com/s/article/Glossary-of-genealogical-terms?language=en\\_US](https://support.ancestry.com/s/article/Glossary-of-genealogical-terms?language=en_US)
- ▶ “Internet Archive Wayback Machine” at *Archive.org*: <https://archive.org/>
- ▶ *See* appendices, e.g., F: General Genealogy Tips or G: Swedish Genealogy Aids.

## 2. DIGITAL GENEALOGY

Technology has become an essential component of genealogy during the past 20 years. There has been an explosion of computer software, blogs and forums, online databases, and DNA testing services. Digital photos and scanned PDFs of historical records now offer easy access to genealogical information that was previously difficult to locate and review. Artificial intelligence, or AI, is becoming a useful family history tool: one application is to use facial recognition to identify unknown people in photos. Geographic information systems (GIS) allow individuals and their biographical information to be linked to places on maps. Organizational applications help to manage research tasks and data. This chapter is a brief on the technology I employ for my ancestral explorations.

### GEDCOM

The initialism GEDCOM stands for GENEalogical Data COMMunication, which was developed by the Church of Jesus Christ of Latter-day Saints in the early 1980s. GEDCOM is the accepted standard for exchanging genealogical data and is utilized to an extent by almost all genealogy applications. It is a data and file format that is strictly text-based: it is not a relational database. The GEDCOM specification is the technical documentation for the file format, which organizes lines of text hierarchically. The hierarchy consists of six 'zero-level' types of data; the tags that identify them are:

1. INDI – Individuals (that is, People)
2. FAM – Families
3. OBJE – Multimedia Objects (photos, document images, recordings, external HTML files, videos, and the like)
4. SOUR – Sources (publications, legal documents, emails, personal contacts that provide information records in the genealogy database)
5. REPO – Repositories (places where sources are stored), and
6. NOTE – Notes (multiple lines of text)<sup>1</sup>

“The GEDCOM Specification tells developers the details of the file format, how to read and write GEDCOM files.”<sup>2</sup> However, files written by various genealogy software are known to have confusing inconsistencies. Though later versions have been released (5.5.5 and 7.0), GEDCOM 5.5.1 remains the industry standard. A push is underway for app developers to adopt 7.0.

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<sup>1</sup> Darrin Lythgoe and various contributors, “GEDCOM: Primary GEDCOM Objects” at *TNG Wiki* (<https://tng.lythgoes.net/wiki/index.php/GEDCOM> : accessed 21 January 2024).

<sup>2</sup> Tamara Jones, “GEDCOM: The Genealogy Data Standard” at *gedcom.org* (<https://www.gedcom.org/> : accessed 28 February 2023).

## GEDCOM Validator

I installed the Chronoplex GEDCOM Validator on my laptop to check a GEDCOM file for problems that could lead to data loss when transferring files between different genealogy applications. The process is pretty straightforward.

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### GEDCOM resources:

- ▶ "GEDCOM: The Genealogy Data Standard" by Tamura Jones at *gedcom.org*:  
<https://www.gedcom.org/>
- ▶ *Modern Software Experience* by Tamura Jones: <https://www.tamurajoinet.net/index.xhtml/>
- ▶ *See* GEDCOM 5.5.5 Tag Definitions, Appendix D

## Family Historian7

I read dozens of online articles and forums, and tried out multiple web, mobile, and desktop applications before selecting Family Historian as my primary genealogy software. Family Historian is designed to link facts about individuals and families with the sources of that information, and I take full advantage of this capability to document my family history. The following are the factors that led to my choice of Family Historian over other offerings.

- ✓ An active Family Historian online user group: FHUG.org.uk.
- ✓ Robust customization options.
  - Requires effort to understand and utilize, but I've mastered several advanced customizations that make the app most useful to me.
  - Plugins enhance Family Historian utility.
- ✓ Complies with GEDCOM 5.5 which supports sharing data, though not all data is 100 percent compatible with other GEDCOM-based software.
- ✓ Exports and imports GEDCOM 7, including an option for a compressed zip file called a GEDZIP file.
- ✓ All data is resident on my computer and under my control; once data is in the 'cloud' I've lost control.
  - Family Historian privacy filters allow postings to the web or otherwise sharing while retaining confidential data.
- ✓ Desktop user interfaces are more responsive than with web-based apps.
- ✓ Backup is more certain than web-based.
  - I perform regular backups of my Family Historian data to Dropbox and my general computer files to an external hard drive.
- ✓ Continues to function if the vendor disappears or changes web-based access requirements.
- ✓ Finally, there's lower cost due to a one-time license fee, rather than a monthly or annual subscription.<sup>1</sup>

I first purchased the Family Historian version 6 (FH6) in August 2018 and upgraded to version 7 (FH7) in February 2020. Due to its complexity, I refer to a published guide created by the developer of the software and to an active online user group (<https://www.fhug.org.uk/>). I note herein aspects of Family Historian that have confused me or modifications that I've made through its settings. For instance, **fact** is used as shorthand for genealogical information in Family Historian, i.e., the content of a record. Also included are operational reminders. All Family Historian data is stored in **projects**, which are individual folders on my PC. I currently have one active project: BruceEdwinJacobson (C:\Users\Bruce\Documents\Family Historian Projects\BruceEdwinJacobson).

I maintain two companion applications that launch from within Family Historian. One is an online subscription to MyHeritage genealogy platform that enables access to MyHeritage

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<sup>1</sup> Tamura Jones, "Why You Need a Desktop Application as Your Main Genealogy Program," at *Modern Software Experience* (<https://www.tamurajones.net/WhyYouNeedADesktopApplicationAsYourMainGenealogyProgram.xhtml> : posted 04 September 2016).

databases from Family Historian. I also utilize the free Ancestral Sources companion application, updated to conform to FH7. It is used to efficiently document census, birth, baptism, marriage, death, and burial entries. *See* chapter 6: “Note, Fact, Source, and Citation in Family Historian.”

## FH7 Plugins

Following the upgrade to Family Historian version 7, I installed updated versions of the free Family Historian plugins I use most often. The plugins were developed by users as ‘shortcuts’ for various tasks. Here is the current state of plugin updates:

- Adjust AKA Names for Reports
- Ancestral Sources Data Entry (must also be installed in addition to Ancestral Sources).
- Backup and Restore Family Historian Settings
- Change Any Fact Tag
- Change Specific Fact
- Check Installed Plugins Against the Store
- Clean Up Notes
- Convert Text From Source to Rich Text
- Create Source Template Definitions (from FH7 project SOURCE TEMPLATE RECORDS)
- Export Gedcom File
- Find Duplicate Custom IDs
- Find Duplicate Individuals
- List All Citations for a Selected Source
- Map Life Facts
- Notes List for Individuals
- Rearrange Address and Place Parts.

### Export

One of the advantages of Family Historian is that its data organization is based on GEDCOM specifications. Family Historian v7 improved exports by using the standard UTF-8 GEDCOM 5.5.1 format (UTF-16 encoding in FH6 is not recognized by many other genealogy programs). Nonetheless, GEDCOM file exporting by FH7 was deemed lacking so a Family Historian user created the Export Gedcom File plugin. *See:* GEDCOM export subsection of chapter 8 for details.

### Backup

Family Historian has a backup function. However, the backup saves FH7 custom settings in scattered places, such as the Windows Registry and Family Historian subfolders. Users have asked the developers to simplify the backup process, but without success.<sup>1</sup> So, a Family Historian user developed the Backup and Restore Family Historian Settings plugin, which I regularly use. As the name implies, the plugin can also be used to recover data and settings.

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<sup>1</sup> Mike Tate [tatewise], “Re: re-installing AS [Ancestral Sources] on new computer,” at *FHUG: Family History User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=34&t=16595&p=90582#p90575> : posted 18 February 2019; accessed February 2019), topic 16595 post 90575.

## Workspace Windows

Family Historian has 14 windows where genealogical data is entered, organized, and viewed. The last five listed below are form-like windows sometimes referred to as ‘dialog boxes.’ The software developers consider the Focus Window (Figure 2-1) to be the “hub window of the application.” I mostly use the RECORDS Window (Figure 2-2) and the **floating Property Box** (Figure 2-3) or main data entry screen.<sup>1</sup>

- Focus Window – show relationship information for a chosen ‘focus person.’
- RECORDS Window – view, search, and manipulate FH RECORDS (described in chapter 6).
- Diagram Window – display family trees, or ‘diagrams’ or ‘charts.’
- Media Window – browse and work with documents of all kinds.
- Reports Window – display generated reports.
- Book Window – display generated books.
- Query Window – create, view, edit and run queries (stored instructions for retrieving and displaying information).
- Map Window – view events and places marked on maps.
- Web Search Window – designed to transfer data from web pages to Family Historian.
- Property Box – enter data in conjunction with other windows.
- Citation Window – enter and view details of source citations (Figure 6-2).
- Note Window – main window for entering notes.
- Automatic Source Citation Pane – specify source citations to be automatically added; as of this writing, I do not use this window.
- Projects Window – open or create a FH7 project; I currently use only one project.

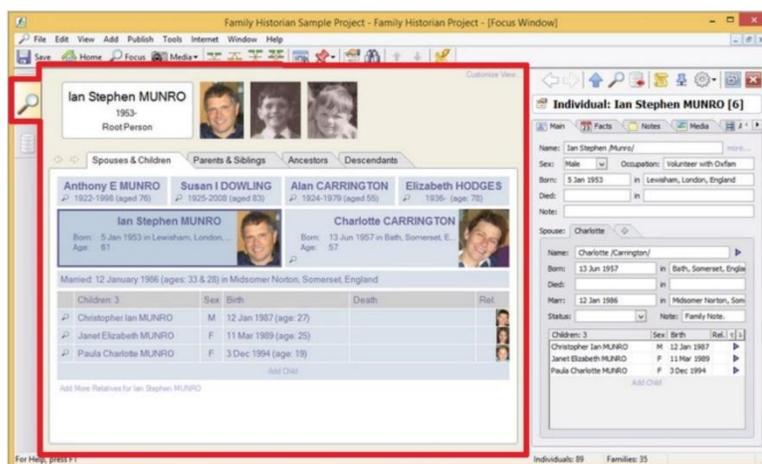


Figure 2-1: Focus Window in red (with docked Property Box). (by Calico Pie, Ltd.)

<sup>1</sup> Calico Pie Limited, “Workspace Windows” at *Family Historian7: The Help* ([https://www.family-historian.co.uk/help/fh7/hh\\_start.htm#main\\_windows.htm](https://www.family-historian.co.uk/help/fh7/hh_start.htm#main_windows.htm) : accessed 26 January 2024).

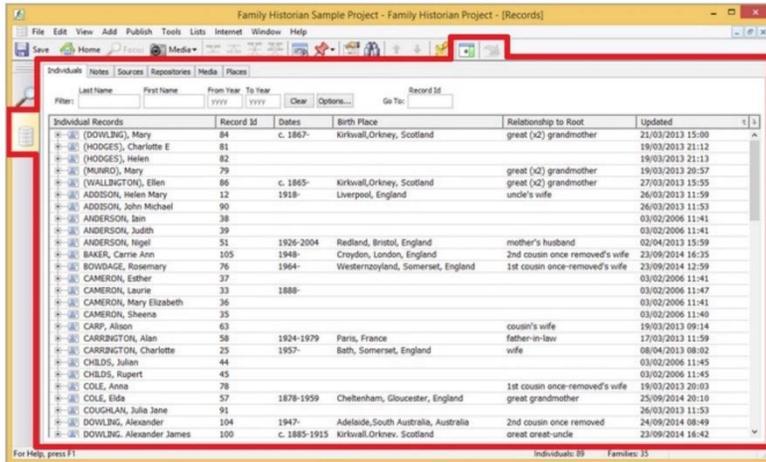


Figure 2-2: Records Window. (by Calico Pie, Ltd.)

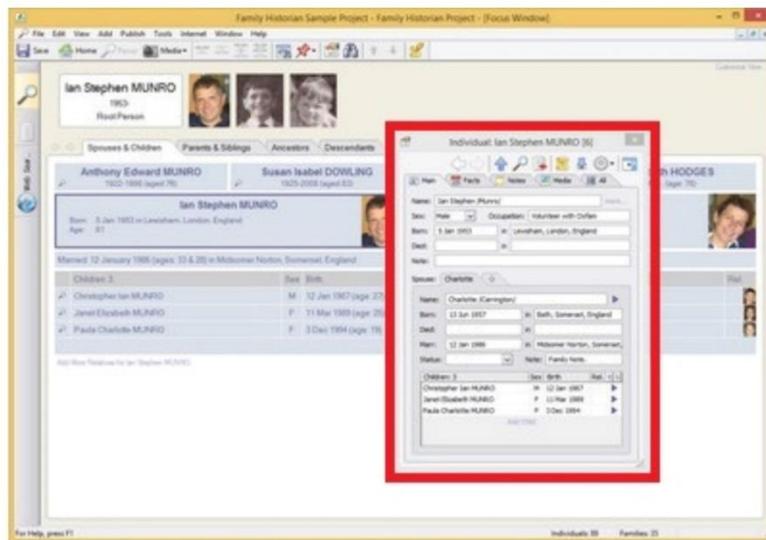


Figure 2-3: Property Box, floating. (by Calico Pie, Ltd.)

## Snapshots

Family Historian automatically takes periodic ‘snapshots’ of my GEDCOM file(s). As described in the app’s online help,

at most one snapshot is taken each day.... Only a maximum of 8 snapshots are stored, at any one time (with default settings); so when the maximum is reached, as new snapshots are stored, old ones are deleted.... Snapshots are only taken when you save changes; so if you view your project without making changes, no snapshot will be taken.... All this said, snapshots can provide a useful additional layer of protection.<sup>1</sup>

<sup>1</sup> Calico Pie Limited, “Snapshot Manager” at *Family Historian7: The Help* ([https://www.family-historian.co.uk/help/fh6/hh\\_start.htm#snapshotmanager.html](https://www.family-historian.co.uk/help/fh6/hh_start.htm#snapshotmanager.html) : accessed 06 September 2023).

### Backing-up FH7 data:

- Launch Backup and Restore Family Historian plugin from FH7 **Tools Menu**.
  - ◊ check path to Dropbox → Family History → FH7 Backups folder.

### Restoring FH7 data:

Backup and Restore Family Historian plugin.

- **Tools Menu:** Launch plugin from FH7.

Family Historian Snapshot.

- **File Menu:** Backup/Restore > Revert to Snapshot.
- **Project Window:** More Tasks button > Manage Snapshots.

### General FH7 resources:

- ▶ *Getting the Most from Family Historian6* by Simon Orde (London: Calico Pie Limited, 2016).
- ▶ “The Tour” at *Family Historian7 Genealogy and Family Tree Software*: [family-historian.co.uk/tour](http://family-historian.co.uk/tour) . A single-page overview of Family Historian features.
- ▶ FHUG forums at *Family Historian User Group*: <https://fhug.org.uk/forum/>
- ▶ “Family Historian Zoom Group:” <https://fhzg.co.uk/>
- ▶ “Backup and Restore Family Historian Settings via Windows” at *Family Historian7 Plugin Store*: <https://pluginstore.family-historian.co.uk/page/plugin/backup-and-restore-family-historian-settings-via-windows>
- ▶ “Export GEDCOM File” at *Family Historian7 Plugin Store*: <https://pluginstore.family-historian.co.uk/page/help/export-gedcom-file>
- ▶ “Finding Where Records Are Used” at *Family Historian Help*: <https://fhug.org.uk/kb/kb-article/finding-where-records-are-used/>
- ▶ “Glossary of Terms” at *Family Historian Help*: <https://www.family-historian.co.uk/help/fh7/glossary.html>

## Gedshow and GedView

### Gedshow WordPress Plugin

A Family Historian user developed a simple WordPress plugin that displays part of an uploaded GEDCOM file: occupations, birth, baptism, death, burial, residence and occupation dates, and places are shown. Also, marriage, spouse, and children are listed, as appropriate. After installation Gedshow displays the information using the shortcode, `[gedshow]`.

Some options require an individual's reference number, which can be found for the person in the header of their normal Gedshow page by hovering over their name. If a selected individual had children, a **Show Tree** button is displayed. When given and surnames are shown for individuals, the sex of the individual is shown after the surname using the Unicode symbols, ♂ for male and ♀ for female.

#### Gedshow Custom CSS

The plugin did not display properly when I installed it, and I did not like the color scheme. So, I added custom CSS (cascading style sheets) code to my WordPress installation with the help of the Gedshow developer.

```
/* Gedshow Widget*/
/* ----- */
#post-3931 .entry-content-container {max-width:90% !important;
}
.cs_tree_btn {background-color: #868686; height:40px;
}
.cs_death {background-color: #ebc7eb !important;
}
.cs_birth {background-color: #ffff80 !important;
}
.cs_marriage {background-color: palegoldenrod !important;
}
```

#### ~~~~~ Entering Gedshow shortcodes, WP classic block editor:

- `[gedshow living="yes"]` displays a list of all surnames in the database, linked to all individuals with the surname; `[gedshow living="no"]` is the default.
- `[surname sn="smith" living="yes"]` displays the data for a single surname; `[surname sn="smith" living="no"]` is the default.
- `[gs_individual id="I1" name="Y"]` displays a person's name (if Y is in the shortcode) followed by their birth, marriage, and death details and then any person-level notes. Can be placed on any page or post.
- `[gs_tree id="I1"]` displays a 3-generation ancestry tree for a chosen individual. Can be used anywhere on a page or post. *Note:* Does not check for living individuals being displayed.

### Entering Gedshow widgets:

- Gedshow Birthdays can be displayed in any widget area (ideally 250px wide or wider); the title and number of birthdays to be shown is selectable (default 10). Only day and month are shown so living individuals are shown.
- Gedshow Surnames shows a configurable number (default 10) of the greatest number of surnames in the database.
- Gedshow Anniversaries shows a configurable number (default 5) of the upcoming wedding anniversaries in the database.
- Gedshow In Memoriam shows a configurable number (default 10) of the upcoming death anniversaries in the database.

### GedView Mobile App

Family Historian does not offer a mobile app for FH7 data. Therefore, I have installed the GedView app on my iPad. It reads GEDCOM files directly, as exported from FH7, thus enabling access to data when my computer is not handy. Information is stored in a database in GedView, which they refer to as a 'tree.' The developer purports that the app permits editing, and synchronizing any changes upon import to either program, though I have yet to test this. *See:* GEDCOM export file subsection of chapter 8 for details about exporting data for upload to GedView.

- <https://www.gedview.com>

---

### Uploading GEDCOM file, GedView:

*Note:* 'Download From Website' and 'Upload To Device' connect to the internet.

- **Index:** Trees > + > Browse.
  - ◇ make sure Dropbox is selected in the **Location dropdown menu**.
  - ◇ Dropbox → Family History → GEDCOM files.

## ArkivDigital and Riksarkivet

The Swedish National Archives maintains Riksarkivet as a free online resource that presents digitized records from its archives; ArkivDigital is a subscription service offered by a private company. Both have similar records as most of the originals are held by the National Archives. Both offer English translations of their websites.

ArkivDigital has advantages. It uses full-color digital images of the originals, which are easier to read. The information is organized and presented in a more user-friendly way. Also, the Arkiv Digital company cooperates with other like platforms to share records and databases, and has unique digital copies of published records. These differences prompted me to pay for an ArkivDigital subscription.

- <https://riksarkivet.se/>
- <https://www.arkivdigital.net/>
- <https://www.arkivdigital.se/>

ArkivDigital has separate U.S. and Swedish versions of their website (*see* URLs above). There are slight differences in content, so checking both might be prudent if researching a thorny issue. ArkivDigital performs best with the Chrome browser. Several ArkivDigital indexes are helpful for quickly searching records.

- “BiS (population of Sweden) 1800-1947”
- “Birth Index (parts of Sweden)”
- “Censuses of Sweden 1940-1990”
- “Marriage index, parts of Sweden”
- “Death Index (parts of Sweden)”

### Population of Sweden Index, 1800–1947

ArkivDigital, in partnership with MyHeritage, created a searchable name index of parish and congregation books for the years 1800 to 1947. It also includes information for 1878 to 1926 from the Roteman Archives held by the city of Stockholm archives. (Unlike the rest of the index, moving in and moving out records are included for Stockholm.) In total, the index covers more than 164 million posts based on the records written by the clergy “to keep track of the population.” While extremely useful, the creators caution that “an index is only an index;”<sup>1</sup> *see* Indexes and Crowd-Sourced Family Trees section, this chapter.

---

#### Searching Population of Sweden, ArkivDigital

- **Index Search:** BiS (Population of Sweden) 1800–1947 > Simple Search.
  - > enter only birth date using dashes (European/ISO format: yyyy-mm-dd).
  - > add given names in Simple Search to narrow results, if needed.

---

<sup>1</sup> Arkiv Digital AD AB, “BiS, Population of Sweden, 1800–1947” at *ArkivDigital* (<https://www.arkivdigital.net/online/register/population-of-sweden> : accessed 25 April 2023).

### Saving record images, ArkivDigital

- Size image on screen to capture desired portion of record desired (may need to rotate: **Rotate** icon in the toolbar > **Save** icon > Save image.  
*Tip:* Do not copy ArkivDigital records in full-screen mode.  
*See* the chapter 5 action: capturing document from random webpage, FireShot.

### ArkivDigital and Riksarkivet resources:

- *Explore Your Swedish Heritage: How to search for your Swedish origin in church books and other documents on the internet* by Håkan Skogsjö (Lyrestad, Sweden: Arkiv Digital, 2020)
- “Repository Profile: An Overview of ArkivDigital” (video) at the enrolled course *Searching Sweden* by Caroline Guntur: <https://www.coursesbycaroline.com/courses/1171755/lectures/29951217>
- “Repository Profile: An Overview of Riksarkivet” (video) at the enrolled course *Searching Sweden* by Caroline Guntur: <https://www.coursesbycaroline.com/courses/1171755/lectures/29958181>
- ArkivDigital User Guide by ArkivDigital: Appendix C

## MyHeritage

MyHeritage is an online genealogy platform that was first developed by an Israeli company. Subscribers can create family trees, upload and browse photos, search historical records, and get DNA results.

- ▶ <https://www.myheritage.com/>

MyHeritage has entered into partnerships and collaborations with other companies and entities including ArkivDigital, FamilySearch, and BillionGraves. Potential MyHeritage research hits appear as a green circle with a number inside indicating the number of potential hits for an individual in their FH7 Focus Window

As mentioned above, I have a subscription that gives me access to records in the United States and England (and church books from 1840 to 1947 for Sweden) from within my Family Historian desktop application. I purchased a 50-percent-discounted 5-year subscription that expires in September 2027 (and includes a \$50 credit for purchase of other MyHeritage services.)

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### MyHeritage resources:

- Priority support: 1-844-994-1888

## Supplemental Software

I rely on other applications that are not genealogy programs to research and record family history. Of course, I utilize Microsoft Word, MS Excel, etc. in addition to the following.

### Adobe Bridge

Adobe Bridge is a free digital asset management or visual media manager app that is part of Adobe Creative Cloud. Though it has options for organizing, copying, and moving photos, I primarily use it to manage genealogical documents' metadata. It launches from Adobe Creative Cloud.

- <https://helpx.adobe.com/support/bridge.html>

### Airtable

I hold a free Airtable subscription and when on my PC employ the web-based version and the Airtable extension in the Chrome browser. I use the Airtable app on my iPad. Airtable holds my Research Plan and Research Log (*see* chapter 3: "Write It Down"), Swedish Geographic Terms Glossary, and Swedish Genealogic Terms Glossary. While data can be downloaded to a CSV file for long-term storage, attachments—such as images of genealogical records or photos of keepsakes—cannot. Airtable is tool to help organize my information, but not a permanent record.

- <https://airtable.com/>

### Blurb and BookWright

Blurb is an online self-publishing platform for print media that integrates with InDesign, Photoshop, and other desktop graphic design software. Among those others is a free program distributed by Blurb called BookWright. BookWright offers templates and full layout, typography, and cover design capabilities for books, magazines, and e-books. An advantage of Blurb over Amazon's Kindle Direct Publishing, a.k.a. KDP (which I've used in the past), is the free BookWright design software. I've downloaded the Blurb app to my iPad and the BookWright software to my laptop. Now I just need to write my family history—maybe as a few magazines?

- <https://www.blurb.com/my/account/login>

### Catalogit

I use the mobile app and web interface of Catalogit, a cloud-based collections management platform, to maintain an inventory of family keepsakes (*see* chapter 7: "Family Keepsakes"). The relatively new collections system was developed by two archaeologists who are also private collectors. I communicated with one of the founders through many emails because I do not find the organization of the app intuitive. However, it is a native mobile app and has the capability I need. My free personal account allows up to 50 entries so I will likely need a paid subscription. (Catalogit also offers museum, organization, and conservator paid accounts.) I like the reporting options available. Posting entries to either a common

website called Hub or to a WordPress site (\$20/mo. add-on) is an option with a paid subscription at any level.

- <https://www.catalogit.app/>
- <https://hub.catalogit.app/>

## Dropbox

Dropbox is a cloud storage system that synchronizes the contents of folders on Dropbox's servers with folders on my computer hard drive. Files can be edited and kept up to date using my computer-based applications or my iPad Dropbox app and by accessing Dropbox.com. I have a paid subscription.

- <https://dropbox.com>

## Epson Scan

This software, installed on my laptop, supports my Epson v600 flatbed scanner with drivers and utilities. It launches the scanner. More in Appendix E.

## FireShot

I purchased a lifetime license for FireShot Pro, an extension that I've installed on my Mozilla Firefox and Google Chrome browsers. It is useful to acquire genealogical or reference information from webpages that don't have download options.

- Captures full web pages, visible part, or just a selection.
- Edits and annotates screenshots with arrows, shapes, and text annotations.
- Appends headers, footers and watermarks with date, time, page URL, etc.
- Saves information as PDF, PNG, JPEG, BMP or GIF. Includes live links in PDFs.
- ▶ <https://getfireshot.com/>

## Folder Marker Pro

Folder Marker lets me add folder icons and to color-code folders, as described in this guide's color coding subsection of chapter 5. Changes can be made to individual folders with MS File Explorer or by using the Folder Marker program interface. The latter allows selection of multiple folders.

- <https://foldermarker.com/en/>

## Google Chrome

The internet opens a wide world of historical records to the family historian. I normally use the Firefox web browser, but use Google Chrome for genealogical research because I've installed the following Chrome extensions from the Chrome Webstore (Firefox does not offer similar addons):

- Send to Airtable – Enters web information into my Genealogy Research Log.
- Search the current site – Searches all pages of any website.
- Google Translate – Translates highlighted text or entire pages, or entire text documents.
- PDF-Exchange – Converts webpages to PDF files.

## Google Earth

I use the desktop and iPad versions of Google Earth to geocode and view places related to family history. Google Earth superimposes satellite images, aerial photography, and GIS data onto a 3D globe, “allowing users to see cities and landscapes from various angles.... Street View displays 360° panoramic street-level photos of select cities and their surroundings. The photos...can be viewed at different scales and from many angles, and are navigable by arrow icons imposed on them.”<sup>1</sup> Details about how I use Google Earth for genealogy are found in the coordinates subsection of chapter 3 and in the Mapping Family Places section, chapter 4.

- <https://earth.google.com/web/>

## Google Lens

Google Lens, which started out as a stand-alone mobile app, is now incorporated into Google’s Chrome browser. Lens uses a form of artificial intelligence that “enables computers to interpret and understand visual information from the world.... It applies machine learning models to identify and classify objects in digital images and videos, then lets computers react to what they see.”<sup>2</sup> Thus, Lens can translate an image’s text, identify an object in an image, or find the original source from an image. Right-click on any image on a web page, then select `Search image with Google Lens`. Or select the image icon in the Google search bar.

- <https://lens.google/>

## Google Translate

Accessed at [translate.google.com](https://translate.google.com), this free service translates text, documents, and websites from one language into another. I use its website interface and a mobile app in addition to the Google Translate Chrome extension. “As of 2022, Google Translate supports 133 languages at various levels.”<sup>3</sup> See chapter 3 section, Language and Translation.

- <https://translate.google.com/>

## IrfanView

IrfanView is a freeware graphic viewer with a simple interface. I especially like the first of the following features when working with genealogy-related images:

- **merging two photos**
- lossless JPG rotation, crop and Exif date change (also in batch mode)
- slideshow (save slideshow as EXE/SCR or burn it to CD)
- batch conversion (with advanced image processing of all files)
- multimedia player

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<sup>1</sup> Wikimedia Foundation, “Google Earth” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Google\\_Earth](https://en.wikipedia.org/wiki/Google_Earth) : page last edited 23 October 2021; accessed 23 October 2021).

<sup>2</sup> Arm Limited, “What Is Computer Vision?” at *arm: Glossary* (<https://www.arm.com/glossary/computer-vision> : accessed 12 November 2023).

<sup>3</sup> Wikimedia Foundation, “Google Translate” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Google\\_Translate](https://en.wikipedia.org/wiki/Google_Translate) : last edited on 14 August 2023; accessed 29 August 2023).

- paint option – to draw lines, circles, arrows, straighten image etc.
- add overlay text/image (watermark)
- IPTC metadata editing.

## OpenStreetMap

OpenStreetMap is a free, open-source geographic database that is updated and maintained by a community of mappers that contributes and maintains data about roads, trails, cafés, railway stations, and more. It is "commonly used to make electronic maps, inform turn-by-turn navigation, assist in humanitarian aid and data visualization."<sup>1</sup> OpenStreetMap was created in Great Britain in 2004 and is hosted and supported by the international nonprofit OpenStreetMap Foundation. Family Historian utilizes OpenStreetMap for mapping locations entered in the genealogy software's PLACE RECORDS.

- <https://www.openstreetmap.org/>

## PDF-XChange

I have a single-user license for PDF-XChange Editor Plus. Like the standard free PDF Editor tool, it is used to create, edit, fill, sign, highlight, and annotate PDF files. Graphics can also be moved, resized, or removed. I chose the Plus over the freeware license for the enhanced OCR (optical character recognition) and the OFFice2PDF utility that enables batch-conversion to PDF of MS Word, Excel, and HTML documents (must be launched externally). The developers claim that the OCR engine has the following features.

- Recognizes stylistic elements of text such as the Font, Color, Bold, Italic, Strikeout and Underline values.
  - Recognizes tables in scanned documents and generates shape objects along with converted text in order to maintain a crisp output.
  - Create PDFs with Editable Images and Text — replaces image-based text in source documents with standard, editable text.
  - Create PDFs with Fine Page Content — replaces original page content with updated content that contains only text and images recognized during the OCR process.
  - Supports 150 languages improved from 50 and includes 'RTL' (Right to Left) Language support such as Arabic and Hebrew.
  - Auto-Detect Image Skew automatically detects image skews (up to +/- 45 degrees) and/or incorrect page rotations (90, 180, or 270 degrees) in scanned documents.
  - Correct Auto-Detected Image skew corrects image skews and incorrect page rotations that the Auto-Detect Image Skew feature identifies.<sup>2</sup>
- <https://www.tracker-software.com/product/pdf-xchange-editor>

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<sup>1</sup> Wikimedia Foundation, "OpenStreetMap" at *Wikipedia, The Free Encyclopedia* (<https://en.wikipedia.org/wiki/OpenStreetMap> : accessed 03 October 2023).

<sup>2</sup> PDF-XChange Co. Ltd. (Tracker Software), "What is the benefit of the new OCR plugin" at *PDF-XChange by Tracker Software* (<https://pdf-xchange.eu/pdf-xchange/v9-ocr-plugin.htm> : access 22 November 2021)

## Search Engines

Google is the most popular web search engine in the world, with 92 percent share of the global market.<sup>1</sup> Below are some advanced ways to improve search results, which I learned during a conference presentation by Cyndi Ingle (of *Cyndi's List*)<sup>2</sup> and from Caroline Guntur's course, *Searching Sweden*.

Soundex is an algorithm used to search for alternate spellings of a name, using the way the name is pronounced. If a search engine offers Soundex it can help find records despite differences in spelling in the record or the record index. For instance, Soundex could find 'Smythe' for 'Smith' or errors such as 'Smth' for 'Smith.' Soundex searches ignore all vowels and the consonants h, w, and y, because these letters are most commonly switched, added, or deleted.

Soundex codes were created in the 1930s. "Each Soundex code consists of one letter and three numbers, and always begins with the first letter of the name ('S' for 'Smith,' for example)."<sup>3</sup> Most online search engines that use Soundex do not display the Soundex codes—similar names spelled differently simply appear together on the search results list.

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### Advanced Googling:

- Customize Google settings:
  - ◇ language,
  - ◇ number of results shown,
  - ◇ open results in new window.
- AND, OR, NOT – need to be in caps.
  - ◇ AND = + (plus sign),
  - ◇ OR = | (vertical line); also true in ArkivDigital search,
  - ◇ NOT = - (minus sign).
- exact phrase = in double quotes
- ~ = similar words or phrases.
- AROUND = returns words number in parens ( ).
- ' | ' (vertical line) = 'or'.
- Select the image icon in the search bar for facial recognition and other AI-assisted searches.

### Soundex resources:

- ▶ *Yet Another Soundex Converter*  
<https://bradandkathy.com/genealogy/yasc.php>

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<sup>1</sup> Wikimedia Foundation, "Google Search" at *The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Google\\_Search](https://en.wikipedia.org/wiki/Google_Search) : updated 07 May 2023; accessed 21 May 2023)

<sup>2</sup> Cyndi Ingle, "Advanced Googling" presented at Family—a Link to the Past & a Bridge to the Future, conference of New England Regional Genealogical Consortium, 3–6 April 2019, Manchester, New Hampshire.

<sup>3</sup> Ancestry.com Operations, L.P. ("Ancestry.com"), "Searching with Soundex" at *Ancestry Support* ([https://support.ancestry.com/s/article/Searching-with-Soundex?language=en\\_US](https://support.ancestry.com/s/article/Searching-with-Soundex?language=en_US) : accessed 19 November 2021).

- ▶ *Ancestor Search Surname to Soundex Calculator*  
<http://www.searchforancestors.com/utility/soundex.html>

## Indexes and Crowd-sourced Family Trees

As mentioned, emergence of the internet changed the nature of genealogical research. In addition to improving access to countless genealogical records, it has facilitated one-to-one and group interaction among genealogists through email, forums and message boards, electronic mailing lists, blogs, and social media (Facebook had more than 12,500 English language genealogy groups in 2018<sup>1</sup>), etc. It also has established collaborative online family trees as a preferred tool for amateur genealogists.

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**crowdsourcing** – the practice of obtaining needed services, ideas, or content by soliciting contributions from a large group of people and especially from the online community rather than from traditional employees or suppliers.<sup>2</sup>

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The best-known crowd-sourced platform is probably FamilySearch. It offers genealogical records gathered by the LDS Church to build family trees without charge. Find A Grave is a popular crowd-sourced online collection of cemetery records and gravestone photographs. Anyone who registers can create and amend information on these and other platforms. Therefore, information I may enter and know to be accurate can be readily altered by other users in the ‘crowd.’ I cannot control the accuracy of shared online family data (one reason I chose the desktop Family Historian software). Poor data quality is a topic of much discussion in the humanities and scientific professions and is a major disadvantage of crowd-sourcing.

An advantage is that the volume of data ‘averages out’ some errors. So, the FamilySearch unified family tree, with more than 8 billion names and growing,<sup>3</sup> may be good for looking at global populations but not as useful for detailing the life of my grandmother.

Users of paid subscription genealogy sites such as Ancestry, FindMyPast, and MyHeritage can control access to family data and thus have more quality control. For instance, no one can manipulate my family tree on MyHeritage, or even view it, unless I grant permission. However, inaccurate info is still an issue. ‘Hints’ provided by genealogy sites may point to a record in the company’s database where family historians then have the opportunity to evaluate and document the source and veracity of a genealogical record. Unfortunately, site members frequently do not take the time for documentation; the original source of the information, and thus the ability to check for accuracy, is lost. Sometimes, hints direct users to

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<sup>1</sup> Jeanne Rollberg, “Crowdsourcing Your Family History: When Everyone’s Involved, Genealogy is Preserved” at *AY About You* (<https://aymag.com/crowdsourcing-your-family-history-when-everyones-involved-genealogy-is-preserved/> : accessed 03 May 2023).

<sup>2</sup> Merriam-Webster, Inc., “crowdsourcing” at *Merriam-Webster.com* (<https://www.merriam-webster.com/dictionary/crowdsourcing> : accessed 04 May 2023).

<sup>3</sup> Wikimedia Foundation, “FamilySearch” at *The Free Encyclopedia* (<https://en.wikipedia.org/wiki/FamilySearch> : page last edited on 12 April 2023; accessed 03 May 2023).

another member's tree, and many users simply accept such a match without evaluation. The latter introduces any inaccuracies from that member's information, which could be of their own making or errors made by others. As more people uncritically accept the info, the inaccuracies are amplified as being fact.

In my research I found an Ancestry.com member's entry for my *mormor* [paternal grandmother], Anna Vitalia Lindquist (Jacobson), that indicated she was a twin. Well, she gave birth to twins and her father was a twin (don't know if her mother's family included twins) so that seemed plausible. I was suspicious, however, because it had not been mentioned in family stories. Then I noticed that both twins had the same name; okay, if a child died in infancy it was common for the next child to be given the same name. But if twins, that seemed unlikely. I looked in the online Swedish Lutheran Church household records and saw that there were two entries for her because she had moved out of and then back into the local parish. Whoever transcribed the original genealogical record mistook the two entries for two separate individuals and the Ancestry member accepted the mistake.

Such transcription errors are also among the flaws of indexes. The creators of ArkivDigital caution that "an index is only an index" and "one should always check the original source.... There can be errors in the original record on which the index is based (the priest may have written the incorrect information). The image and handwriting in the original record may be difficult to read, words and numbers may have been misinterpreted and the person who entered the information in the index may have entered it incorrectly."<sup>1</sup> I experienced the latter when looking up the birth record for my grandaunt in ArkivDigital's "Birth index, parts of Sweden." The index transcription uses the variant spelling of Otilia, with only one 't', whereas the original handwritten birth entry clearly spells her given name with double 't's: Augusta Otilia Lindquist. (I've adopted the two-t version.)

I do not rely on information I find in online family trees or indexes. They could be useful to confirm my own research conclusions or to point me in a research direction. But I only enter data in my Family Historian software if I have viewed the genealogical record and reached my own conclusion about the veracity of the found information.

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<sup>1</sup> Arkiv Digital AD AB, "BiS, Population of Sweden, 1800-1947" at *ArkivDigital* (<https://www.arkivdigital.net/online/register/population-of-sweden> : accessed 25 April 2023).

## Genetic Genealogy

DNA testing is another tool recently adopted by millions of individuals to create family history profiles. Companies such as MyHeritage, Ancestry, and 23andMe heavily promote their DNA testing services. MyHeritage alone “has recorded about 80 million members performing ancestral testing every month.”<sup>1</sup> While customers have some control, privacy of personal data is a concern. Testing companies share the huge databases of DNA information they are amassing with drug makers, app developers, and law enforcement. Unauthorized data hacking is also a reality.

Yet, adding DNA to the repertoire of genealogical research tools has advantages. These include

the ability for researchers to extend their ancestry beyond the paperwork of recent centuries, and to construct ancient pedigrees through molecular evolutionary studies. Genealogists also use DNA to solve mysteries in their immediate families, such as to discover biological parents of adoptees or to determine the accurate male ancestor in a non-paternity event (NPE).<sup>2</sup>

I'm not aware of any missing links in my ancestral line that cannot be addressed through document research. Furthermore, my research focus is first on processing the genealogical records I have in hand, and then exploiting available online records. I expect such research will create a family history profile that reaches back a few hundred years. At that point, I may consider DNA testing to unlock more ancient connections. However, I will not have my DNA tested in the near future. Privacy concerns outweigh the benefits for me.

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<sup>1</sup> Straits Research, “Ancestry Testing Market” at *Straits* (<https://straitsresearch.com/report/ancestry-testing-market> : accessed 24 May 2023)

<sup>2</sup> Library of Congress, “Genetic Genealogy: DNA and Family History” at *Research Guides* (<https://guides.loc.gov/genetic-genealogy> : accessed 24 May 2023)



### 3. “WRITE IT DOWN”

Keeping track of what I’ve learned about my family is essential, as is writing down what I don’t know. This means written objectives and strategies—a research action plan—as well as a research log to note fruitful and dead-end research. Consistency when recording data is critical for retrieval and analysis by using standardized formats for individuals’ names, dates, locations, non-English words, etc.

I’ve learned that when exploring genealogical records, accurately copying biographical information as found in sources is critical, especially when it’s contradictory. However, I create a final story through analysis and interpretation of the found information. It’s my job to sort through the raw data and present what I understand to be the true depiction of a person’s life, while also presenting the most viable evidence to explain my conclusions.

Basic tools of genealogy—pedigree charts (family trees), family group sheets, etc.—are universally accepted and are employed by Family Historian; *see* chapter 8: “Sharing Family Stories.” The software offers other ways to document, store, and display family information and allows recording broader historical context too: the software helps ‘write it down.’ Furthermore, data entered once can be accessed in numerous ways, thereby avoiding duplication. Embedded metadata, such as keywords, preserve the essence of what I’ve written down if digital files become separated from Family Historian; *see* chapter 5: “Document Management and Storage.”

#### Categories, Types, and Identifiers

‘Writing it down’ gathers information, but gathered facts must be analyzed and conclusions reached about their veracity. One tool of analysis is identifying similarities and differences and then grouping data that share similar characteristics into **categories** or **types**. Another is to identify unique bits of data and assign identifiers (**IDs**) to each. These IDs aid retrieval of that information and help sort out how it might relate to other data.

Following are the categories, types, and IDs that I employ in family history. I’ve attempted to use them consistently across the various computing platforms described in chapter 2.

#### Categories

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**CatalogIT** – a hierarchical notation of media type and format associated with family keepsake items: e.g., ‘transparency’ [Picture], ‘landscape [oil : Art],’ ...

**fact** – four classes of genealogical information: individual, family, timeline, or witness. *See* types below.

**keyword** – fifteen groupings of purposeful terms for human-made objects, persons, life-changing events, and locations: e.g., [[COMMUNICATION TOOL]], [[DAILY ACTIVITY]], [[PERSON]], [[PLACE]] ...

**source** – four classes of genealogical sources: 1<sup>st</sup> original, original, derivative, or authored.

## Types

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- alternate name** – an individual’s name classified as: aka (if not nickname) or birth (in the case of gender reassignment).
- fact** – genealogical information classified as: Events or Attributes.
- field code** – eight classes of source template definition field codes: Text, Name, Date, Place, Address, Repository, Enum, or URL.
- media** – eleven groupings for modes of expressing ideas or communicating with people: Album, Air (aerial), art, Audial, Census, Object, Letter, Picture, Publication, Text, or Video.
- RECORD** – twelve classifications of Family Historian database RECORDS: e.g., INDIVIDUAL, FAMILY, MEDIA, NOTE, PLACE, REPOSITORY, SOURCE, ...
- record creator** – twelve groupings for entities or individuals that created genealogical records in their original forms (*see* source type: FH7): e.g., Business, Cemetery Operator, Census Authority, Church, ...
- source template** – three custom source template definitions: Universal, Census, Or Published.
- source: AS** – six classes in AncestralSources: Baptism, Birth, Burial, Census, Death, or Marriage.
- source: FH7** – user-created classes in Family Historian that display my 12 record creator types shown above (FH7 suggests: military records, birth certificate, book, census, parish records, passenger list, ...).

## IDs

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- family** – a unique identifier assigned by Family Historian for each FAMILY RECORD: e.g., 1, 2, 3, 4, 5, ...
- family-member** – a unique identifier for each of my ancestors and other family members: e.g., 01.01-1.1, 01.01-1.2., 02.02-1.2, 03.03-1.3, ....
- FamilySearch** – a letter code that matches INDIVIDUAL RECORDS to the FamilySearch Family Tree of LDS Church (%INDI.\_FSID%).
- keepsake** – a link between unique items in the Jacobson-Lindquist-Phillips Archives and information in a database: e.g., art0001, pub0100, obj0002.31, txt020, ...
- media** – a unique identifier assigned by Family Historian for each MEDIA RECORD: e.g., 1, 2, 3, 4, 5, ...
- permanent** – a standard GEDCOM field (RFN tag) supported by Family Historian, though its purpose is vague.<sup>1</sup>
- placename** – a unique identifier assigned by Family Historian for each PLACE RECORD: e.g., 1, 2, 3, 4, 5, ...
- source** – a unique identifier assigned by Family Historian for each SOURCE RECORD: e.g., 1, 2, 3, 4, 5, ...
- standardized place** – a unique coordinate-based identifier for locations associated with my family: e.g., 41.30,-72.92 (a city); 59.3343,18.0663 (a city block); 41.21669,-73.06524 (a building); 42.358517,-71.062271 (a room); ...

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<sup>1</sup> [tatewise] responded to my post on the FHUG forum (<https://www.fhug.org.uk/forum/>) "What is a permanent record number?" explaining the

vagueness of the RFN tag in GEMCOM v5. [KFN] then offered that the tag has been replaced with EXID in v7.

## Research Plan and Log

Keeping a research log is standard genealogical practice, as is planning research tasks. Family Historian v7 includes simple templates for research plans and research logs, classified as RESEARCH NOTES RECORDS. However, even with FH7 text-formatting capabilities, the research note configuration is not flexible enough and these notes are unique to FH7, not understood by other apps. So, I've adopted Airtable's capabilities to capture research objectives, actions, and outcomes in an Airtable base that has four 'tables:' (a) Action Plan, (b) Log Entries, (c) Focus, and (d) Physical Repositories.

I rely on the Action Plan to identify discreet questions for genealogical investigation, which is "the starting point for every research project. It might propose an hypothesis to be proved or disproved.... It might define a need to disambiguate between two same-name people.... Or it might be as straightforward as, *Where was the privateer Jean Lafitte born?*"<sup>1</sup> The following fields in the Action Plan link to related Airtable Log entries that document the plans' implementation.

- o Research question – What am I trying to learn? What is the objective?
- o Type of action – Is the action a one-time procedural task, such as data entry, or more complex research?
- o The focus – Which ancestor, place, or event am I researching?
- o Final outcome – Did I prove my hypothesis? A quick summary reflecting on lessons learned, and how to improve the strategy next time.
- o The hypothesis – What is my working hypothesis?
- o Supporting evidence – What context do I already have that supports my hypothesis?
- o Tasks – What is my strategy for supporting my hypothesis?
- o Resource/Record types? – What would hold the type of evidence I need?
- o What repository? – What repositories or sources might hold the records I seek?
- o Other notes – Anything else?
- o Initial date / Status / End date.<sup>2</sup>

To provide connections with data when working with more complex questions, I create simple FH7 RESEARCH NOTE RECORDS, with a links to the Airtable Action Plan record URL, using a custom template. Research notes are separate from all other notes because as database RECORDS they can be linked to any number of other RECORDS.

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 830.

<sup>2</sup> Caroline Guntur, "Productive Habits: Creating a Research Plan & Log" in Searching Sweden enrolled course at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 07 March 2021). My template is based on a model Caroline offered to students in the course.

Table 3-1: Airtable Research Log Fields

FIELD	PURPOSE	FIELD TYPE
Start date	The date I began working on this.	{text}
Research question	What am I trying to learn?	{link}
Source description	Describe the source (or collection) in which I found the record. Short title? What do I need to know about it?	{text}
Explanation/Scope	Why look in this collection of records? Concise description of task.	{text}
Result	What did I discover?	{text}
Physical repository	Enter physical location link from Repository Table. (Add physical repository name in Repository Table, if needed)	{text}
Website name	What website did I search?	{dropdown select}
Fact type	What type of FH7 fact did I look for?	{multiple select}
Collection/Resource name	What is the name of the collection or resource searched?	{text}
Focus	What individual or family or place is the focus of inquiry?	{link}
Timeframe	Dates, or date range, searched.	{text}
Search parameters	Successive parameters of the search; separated by semicolons.	{text}
Success?	What were the results of this search?	{multi select}
Record file attach	If a record found, attach copy here!	{attachment}
Record URL	If this record available online, what is the direct link?	{url}
Record call or page no	Is there a call number or a page number?	{text}
Record transcription provided	Did the repository give any transcription help?	{text}
URL transcription form	Did the repository provide a blank transcription form?	{url}
Record citation provided	What is the citation offered?	{text}
BEJ Transcription	My transcription.	{text}
Collection URL	If this is a collection (for example, a database) that's available online, what is the direct link to it?	{url}
Source category	Is it 1 <sup>st</sup> Original, Original, Derivative, or Authored?	{select}
Primary or secondary?	What type of information is this?	{single select}
Stopped here this time because...	When done working in the current session, log why I stopped and where I will pick up next, starting with date.	{text}
Notes	Anything not covered elsewhere.	{text}
Notes attachment	Explanatory attachments.	{attachment}
If not original, can it be obtained?	If this is a derivative, can I access the original somehow? Where can the original be obtained?	{text}
Original ordered?	Check if 'yes.'	{checkbox}
Order Info / Receipt	If an original ordered, upload a copy of the receipt or confirmation.	{attachment}
Closed?	Select Open or Closed.	{single select}
Close date	Date when I decided if the record answered my Research Acton Plan question.	{date}

The data garnered from a source that I enter in the Research Log table supplies information for a file’s metadata and also serve as a ‘rough draft’ of my formatted sources in Family Historian, which is where I permanently keep track of such information (*See* Table 3-1). The purpose of my Research Log is to:

- keep research organized and focused,
- avoid duplicating searches of sources without good reason,
- identify what is found or not found for each research objective/question.

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#### Completing research action plan, *Airtable*:

- Open the Genealogy Research Plan & Log *Airtable* database in Chrome browser;
  - ◇ my Chrome browser has the *Airtable* extension installed.
  - > **Action tab** > complete appropriate fields shown in list above.
- Paste the *Airtable* Action Plan Record URL into appropriate FH7 *\_Action Plan* Research Note.<sup>1</sup>

#### Adding research note, FH7:

Method A

- Individual/Family/Place Property Box: **Note Tab**: Add Note
  - > Shared Research Note
  - > New... > Create Research Note > *\_Airtable Plan*
  - > complete fields.
  - ◇ do not change the pre-formatted header labels!
  - ◇ add links to FH7 data
  - ◇ copy question URL from *\_Airtable Plan* **Toolbar Menu**. and add link

Method B

- **Add Menu**: Research Note > *\_Action Plan*.

#### Completing research log entry, *Airtable*:

- Open the Genealogy Research Plan & Log *Airtable* database in Chrome browser;
  - ◇ my Chrome has the *Airtable* extension installed.
  - > **Log Entries Tab** > complete appropriate fields shown in Table 3-1 above;
  - > close research question, if appropriate.

#### Closing research questions, FH7 and *Airtable*

- Change status to ‘closed’ and end enter date in *Airtable* Research Action Plan;
  - > enter end date in FH7 Research Note.

#### Reporting research notes, FH7:

- **Publish Menu**: Publish Tools Finder > Research Reports.

#### Editing research note autotext template, FH7:

- **Tools Menu**: ManageAutotext.

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<sup>1</sup> Caroline Guntur, “Research Log[ic]: Creating an organized genealogy research log” enrolled course at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 21 March 2021). My log fields are based on a base template Caroline offered to students in the course.

## Family-Member IDs

Numbering helps readers follow the lineage of often repeating names or changing surnames by assigning a unique identifier to individuals, and many numbering systems have been devised over the centuries to help genealogists present research to others. One of the most used is the ahnentafel system, which assigns a single number for each direct ancestor of the ‘root’ individual. New numbering is assigned when different root individuals are designated.

Ahnentafel is a standard option in Family Historian, and at first, I chose it for my work in family history. I now use the **ancestral lines pairing system**. The ancestral lines system results in fewer numbers than ahnentafel and has a mathematical foundation. It is a patrilineal system, fitting to my European heritage, which utilizes for its organizing rubric a combination of family lines and generations. The leading number in the ID represents the family line followed by one that signals generation. *See* Figure 3-1. A detailed discussion of the ancestral lines numbering system is online in a New England Historic Genealogical Society journal article<sup>1</sup> and at *Ancestral Lines* ([www.ancestrallines.net](http://www.ancestrallines.net)).

A numbered ID identifies each direct ancestor of the ‘root’ individual. I’ve modified the system so that, with me as the root, my family members have unique IDs. I could use FH7’s ahnentafel should I wish to show the fixed sequence of ancestors for a person other than me. I enter my family-member IDs in the FH7 Individual Custom ID field.

### My Unique IDs

One reason I switched to ancestral lines, over ahnentafel numbering, is to efficiently organize my research materials along family lines, given that the use of Swedish patronymic names precludes relying on hereditary surnames as the organizing element (*see* Swedish naming practices subsection of chapter 3). Another reason is to have a unique ID for individual family members. To do so, a hyphen and two more numbers are added after family line and generation. The first of these numbers indicates consecutive pairings (e.g., marriages) for each male ancestor and, the next, siblings from each pairing. These two-part IDs can be represented as: Line.Generation–Pairing.Sibling. I use a placeholder zero before single digits (e.g., 01 instead of 1) for visual consistency in the first part, Line.Generation.

I adapted ancestral lines numbering to apply to both lineal ancestors and non-lineal family. Using my revised system, I have unique family IDs for my brother and me; our cousins; my nephews, grandnephew, and grandnieces; mother and father; aunts, uncles, and grands (including my foster granduncle); as well as grandmothers, grandfathers, and great-grands.

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<sup>1</sup> Capers W. McDonald, *An Ancestral Lines Pairing System: Uniquely Numbering Each Ancestral Line, Generation, Pairing and Sibling* (Boston: New England Historic Genealogical Society, 30 October 2011), PDF file retrieved from <http://americanancestors.org/>.

	Generation 1	Generation 2	Generation 3	Generation 4	Generation 5
<b>Jacobson, Line 1</b>	01.01-1.1 Carl R.	01.02-1.3 Carl E. R.	01.03-1.4 Carl A.	01.04-0.0 A. Jacob	01.05-0.0 Jacob
Family Line 9					09.05-0.0 Johanna
	(Patrilineal always odd.)				
Family Line 5				05.04-0.0 Sophia	05.05-0.0
Family Line 13				01.03-1.1 Alma	13.05-0.0
				01.03-1.2 Alfred	
				01.03-1.3 Knut	
				01.03-1.4 Carl A.	
				01.03-1.5 Arvid	
				01.03-1.6 Hjalmer	
Family Line 3			03.03-1.3 Anna	03.04-0.0 Anders	03.05-0.0 Johan
Family Line 11			01.02-1.1 Gladys		11.05-0.0 Johanna
			01.02-1.2 Lillian		
			01.02-1.3 Carl E. R.		
Family Line 7				07.04-0.0 Charlotta	07.05-0.0 Carl S.
Family Line 15				03.03-1.1 Karl	15.05-0.0 Maja
				03.03-1.2 Johan	
				03.03-1.3 Anna	
				03.03-1.4 Maria	
				03.03-1.5 Victor V.	
				03.03-1.7 Ellen	
				03.03-1.8 Augusta	
				03.03-1.9 Ernest	
				03.03-1.10f Karl	
<b>Phillips, Line 2</b>		02.02-1.2 Dorothy	02.03-1.1 Ira	02.04-0.0 George	02.05-0.0 Theodore
Family Line 10		01.01-1.1 Carl R.			10.05-0.0 Martha
	(Matrilineal always even.)	01.01-1.3 Bruce			
Family Line 6				06.04-0.0 Rosa	06.05-0.0 William
Family Line 14				02.03-1.1 Ira	14.05-0.0 Emily
				02.03-1.2 Mary E.	
Family Line 4			04.03-1.3 Helen	04.04-0.0 William	04.05-0.0
Family Line 12			02.02-1.1 George		12.05-0.0
			02.02-1.2 Dorothy		
Family Line 8				08.04-0.0 Mary	08.05-0.0
Family Line 16				04.03-1.1 Anna	16.05-0.0
				04.03-1.2 Elizabeth	
				04.03-1.3 Helen	
Pratt, No direct line			...0.03-0.0 Clara	...0.04-0.0 Josiah	
			(no children)		

Only given names shown to simplify the chart.

Figure 3-1: Example of ancestral lines numbers. (after C. McDonald, 2011)

### Lineal Ancestors

In summary, I assign a unique two-part ID to ancestors. The first part represents family line and generation; the second part indicates pairings and position among siblings. My brother and I are of the Jacobson line that ascends from our father. As the root generation, my older brother’s ID would be 01.01-1.1; my unique number would be 01.01-1.2. That is, I would be identified as of the Jacobson family line (01), root generation (01), and the second child (2) of my father’s first and single marriage (1).

### Non-Ancestral Family Members

My brother’s sons are designated as of the Jacobson line (01), with a ‘zero’ generation assignment, followed by their birth order (e.g., 01.00-3.3).<sup>1</sup> For those with no direct lineage whom I consider members of my extended family I use a single zero (0) for the line, followed by the generation with no indication of birth order (e.g., 0.03). I use two leading zeros for my generational peers (00.01), including my first cousins and my brother’s wives. Foster or adopted children in the family have ‘f’ or ‘a’ ending their IDs to associate them with the family group; both their biological and adoptive/foster parents are entered in their RECORD (*see* Name resources subsection below).

### Family IDs

Family Historian assigns a unique, sequential identifier to each Family Record when it is created, which I accept as a family ID. FH7 family IDs have no relationship to my unique family-member IDs.

### **Other IDs**

For individuals who are of interest—but have no familial relationship to me (e.g., non-family witnesses to events or business associates)—I assign only the generation with which they are associated preceded by a period (e.g., .02). These are not unique IDs, but they help order individuals inside sequential lists.

All individuals entered in Family Historian v7 are assigned unique RECORD IDs by the application, which I ignore. Family Search IDs are among others that may be entered in an individual’s FH7 database RECORD (i.e., ‘storage box’) and have the GEDCOM tag.

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### Examples – Family-member ID:

- .03 Oscar Messler – my grandfather’s business associate.
- 0.00 Dina Lee Paulucci (Doheny) – 1<sup>st</sup> cousin once removed.
- 0.01 Kenneth Edward Perkins – 1<sup>st</sup> cousin’s husband.

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<sup>1</sup> Ancestral lines numbering can be used with descendants, but it quickly generates large line numbers and is unwieldy. Capers W. McDonald, “Appendix E: A Descendant Genealogical Numbering System” in *An Ancestral Lines Pairing System: Uniquely Numbering Each Ancestral Line, Generation, Pairing and Sibling* (Boston: New England Historic Genealogical Society, 30 October 2011), PDF file retrieved from <http://americanancestors.org/>.

- 0.03 Clara Pratt – grandfather’s second wife.
- 00.01 Susan P. White – brother’s first wife.
- 00.01-1.1 Georgia Mae Phillips (Collins) (Langley) – 1<sup>st</sup> cousin.
- 01.00-3.1 Joshua Michael Jacobson – nephew.
- 01.01-1.1 Carl Ridgeway “Rick” Jacobson – older brother.
- 01.02-1.3 Carl Edwin Raymond Jacobson – father.
- 01.03-1.4 Carl Albin Jacobsson (Jacobson) – paternal grandfather.
- 02.02-1.2 Dorothy Helen “Dot” Phillips (Jacobson) – mother.
- 03.03-1.3 Augusta Ottilia “Guttie” Lindquist – paternal grandaunt.
- 03.03-1.10f Karl Johan Alvar Jansson (Lindquist) – paternal great-grandparents’ foster child; 10<sup>th</sup> child in the Petersson-Lindquist family.
- 04.03-1.3 Helen Rickards (Phillips) – maternal grandmother.
- 05.04-0.0 Sophia Jonsson – paternal great-grandmother (birth order undetermined).

## Dates, Times, and Numbers

The most readable and reliable form for presenting dates is day/month/year: 05 July 1951. This style is least likely to create confusion when entering, matching, or merging data. (It is also the format used in GEDCOM 5.5 files.) However, I reverse the order using all numerals (yyyymmdd) for digital filenames to aid sorting chronologically, e.g., 19510705. In Europe, dates are typically shown as year/month/day. Caution is needed when reading dates.

The FH7 Date Entry Dialog has tabs for entering five kinds of date specifiers: date (which can be qualified as approximate, calculated, or estimated), period, date phrase, range, and quarter date. In addition, there is the possibility of adding a ‘separate sort date’ to override other dates entered. Date ranges and date periods warrant separate consideration, especially regarding places of residence and times of emigration and immigration.

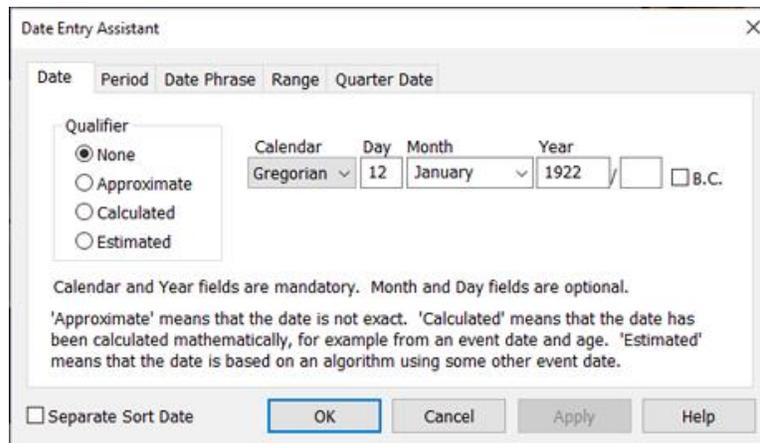


Figure 3-2: FH7 Date Entry Assistant

A date **period** is specific. For example: Bruce Jacobson was resident in Missoula, Montana, from September 1969 to October 1975. A **range** narrows down a timeframe, but is less precise: Bruce Jacobson was a resident in Missoula, Montana, sometime between 1968 and 1980.

In stating the years of a decade, do not use an apostrophe before the s. Avoid the ambiguous phrase ‘turn of the century,’ unless possible to specify which century in the same sentence or earlier in same paragraph.

### Rendering dates:

- Present dates as ‘day month year’ in text; do not abbreviate the month;
  - ◊ always render day with double digits and four digits for the year (except in narratives).
- In databases, abbreviate month as: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, or Dec, without a period in all cases.
- For filenames use only numerals: 00000000 (yyyymmdd).
- Precede estimated dates by one of the following qualifiers, all entered in FH7 without periods:

- ◇ about or circa – abt (‘c.’ is not recognized by GECOM 5.5, BUT it is used by FH7)
  - ◇ after – aft
  - ◇ before – bef
  - ◇ between – bet
  - ◇ calculated – cal.
  - If death date unknown, explain circumstances in notes; following are acceptable entries:
    - ◇ infant – a stillborn and for an individual from birth to age 3, when date unknown
    - ◇ child – someone aged 3–8, when date unknown
    - ◇ leave blank for anyone older than age 8 if no clue about the death date.
- Or enter date phrase in narrative text and FH7.
- ◇ text of up to 35 characters can be entered for a FH7 date; for instance, ‘deceased.’
  - ◇ FH7 adds quotation marks and parentheses as is the GEDCOM standard.
  - Use EN dashes between dates in all text (hyphen OK in databases).
  - Drop century between consecutive years or within same decade (1830–31), otherwise use complete dates.
  - Slash okay with dates where exact year not known (1974/75).
  - Hyphenate compound adjectives formed with ordinal numbers (20th-century values).

#### Examples – Date:

- 05 Jul 1951 – database entry.
- 05 July 1951 – narrative.
- 19510705 – filename.
- 1950s
- abt 1951
- bef 1952
- 1951–52 – same decade in narratives.
- 1836–1864
- 19th century – instead of nineteenth, etc.
  - 19th-century immigrants

#### Times of Day

Times of day are most clearly presented as numbers using the 12-hour clock. That is, use the numerals 1 to 12 followed by am [*ante meridiem*]—before midday—or pm [*post meridiem*]—after midday. In narratives, use small caps for AM and PM. The typical colon separating the hour from minutes may not work well with computer programs so, for metadata for example, replace the colon with a period (11.59 AM). Depending on the situation, ‘12 midnight’ or ‘12 noon’ might best avoid confusion in text.

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#### Examples – Time:

- 4 pm
- 11.59 AM
- 12 midnight

## Numbers and Measurements

### Rendering numbers:

- Spell out numbers under 10, except when a number 10 or above is in the same sentence.
- Spell percent, instead of % symbol; however, use % in tables and within parentheses.
- Use numerals for age; however, ‘in his sixties.’
- Use numerals for all linear measurements, percentages, and acres.
- Spell out the words ‘feet’ and ‘inches;’ symbols okay in tables or parentheses but not smart, or ‘curly,’ quotation marks and apostrophes.
- Do not elide numbers in a range (e.g., 893–897; 1,023–1,045) except year spans; add ‘to’ between age and other ranges in the text; ‘elided’ numbers okay in tables.
- Use dollar sign with money rather than writing it out.

### Examples – Number and measurement:

- 3.5 million acres
- \$200
- 7- to 10-day journey – when in same sentence
- 20 percent
- (20%) – in table or parentheses
- age 20 to 35
- 60 years old
- in his sixties
- 6 feet 9 inches
- (6' 9") – in table or parentheses
- 4 feet by 12 feet 6 inches
- 4-foot-by-8-foot opening

### Number resources:

- “The Price Converter” by Statistikmyndigheten [The Statistics Authority] estimates the current value of Kronor starting from 1921 onward:  
<https://www.scb.se/hitta-statistik/sverige-i-siffror/prisomraknaren/>

## Language and Translation

Most of the original genealogical records I find will have been written in English or Swedish. When transferring information from primary sources, I use the original language and spelling for names of individuals and places, except country names which are always in English. English with U.S. spelling is my preferred language for narratives and I have set FH7 preferences to display ‘English-United States.’ Non-English words—other than proper nouns and titles or direct quotes—are rendered in italics. I include a translation if I think it helpful.

Several apps that I use export data to Excel or CSV files. Microsoft Excel is unable to properly display UTF-8 compliant CSV files when they contain non-English characters. To resolve this issue, I open the export file in Notepad and then save it in ANSI format.

Table 3-2: Swedish Characters

	SWE KEYBOARD	ENG KEYPAD		SWE KEYBOARD	ENG KEYPAD
ä	'	Alt + 132	Ä	"	Alt + 142
å	[	Alt + 134	Å	{	Alt + 143
ö	;	Alt + 148	Ö	:	Alt + 153

### The Swedish Language

The Swedish alphabet uses three letters not found in English: Å, Ä, and Ö which follow Z, in that order. They are distinct letters and have separate vowel sounds. There are at least five ways I can create those letters when typing.

The remaining 26 are the same as English, though Q “is almost never used, except in a few last names. The same goes for Z. W is not treated like a separate letter, and can be used alternately with V. The English w-sound does not exist in Swedish and a written W is pronounced like a V.... C is sometimes used instead of K in names.”<sup>1</sup>

Three or four individual words can be strung together without any hyphens in Swedish. The meaning of these compound words can be discerned by breaking them into their individual parts. For example, *församlingsbok* is composed of ‘congregation book’ and ‘household examination roll’ comprises *husförhörslängd*.

Swedish grammar is complex, though similar to English. “Swedish verbs often look like totally different words depending on the conjugation used” and the endings of nouns change depending on how they are used:<sup>2</sup>

<sup>1</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), pp. 46–47.

<sup>2</sup> Phyllis J. Bladsen and Joseph C. Huber, “Swedish Genealogical Dictionary” (White Bear Lake, Minnesota, 1993), self-published (see Appendix A of this guide), p. iv.

ett hus - a house  
huset - the house

en dam - a lady  
damerna - the ladies.

### Old and New Spelling

The Swedish language was not standardized until the 20<sup>th</sup> century. Therefore, words found in earlier genealogical records may be ‘old’ Swedish—spellings vary.

- “In the old spelling the v-sound was written fv inside a word, and hv at the beginning of a word. In the new spelling the f and h were dropped....
- “At the end of words the v-sound was spelled f, and after the reform v....
- “In some cases e was substituted with ä....
- “In old spelling qu or qv was sometimes used instead of kv. As of 1906 only kv was used and the letter q was practically taken out of use.”<sup>1</sup>

### **Translation**

When entering data in a language other than English, I add a translation in following square brackets or in an accompanying note. In the past I’ve hired consultant Cynthia Wentland for translating some larger documents, such as Carl Albin Jacobsson’s “Trip to America.” Caroline Guntur of Searching Sweden has helped with translating some genealogical records as have volunteers at the Swedish Genealogical Society of Minnesota, which offers a translation service to members (of which I am one).

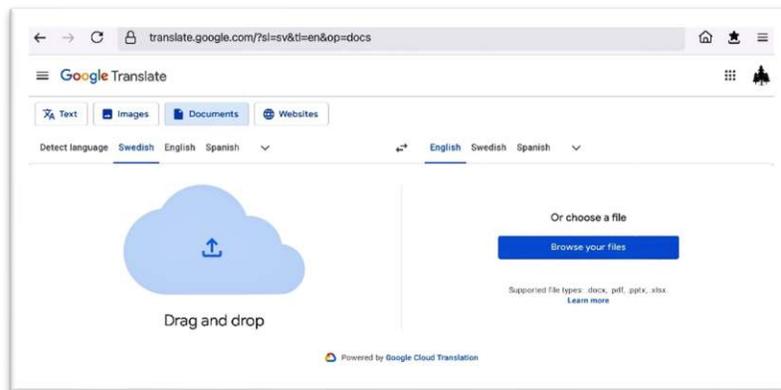


Figure 3-3: Google Translate – Documents

Otherwise, Google is my ‘go-to’ source for translation, where pronunciation of highlighted words is particularly useful. I’ve installed the Google Translate extension in Google’s Chrome browser, which is what I use for genealogical research. The browser extension translates highlighted text or translates an entire webpage. I can translate text (a) through my phone or iPad using the camera, (b) speaking in the Translate app, or (c) writing with my finger or iPad

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<sup>1</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), pp. 45–46.

pencil. In addition to those actions, images and documents (docx, pdf, pptx, or xlsx) of up to 300 pages and 10 MB can be translated by Google Cloud Translation for free at: [translate.google.com](https://translate.google.com).

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### Using original language:

- Use original language for proper nouns; except countries are in English (no italics):
  - ◊ USA, UK, and USSR abbreviated.
- Put non-English words in *italics*, but not proper nouns, titles, or quotes.
  - > when city, parish, river, etc. are part of a placename, use original language with no italics (e.g., Velinga socken [Velinga parish])
- Place translations in editorial square brackets: [translation].

### Typing in Swedish:

- Copy and paste Å, Ä, and Ö from another document.
- On IOS devices (iPad and iPhone), hold down the letter A for Å, Ä options and the letter O for Ö. Upper case or lower case is typed by holding down the Shift key as usual.
- Within FH7, hold down A or O for Swedish options, as with IOS.
- Switch between ENG and SWE icons in the lower right corner of the MS Windows 10 screen.
- ◊ I have activated the MS Windows 10 Swedish Keyboard, which rearranges other keys as well.
- Use the keypad and the Alt key to type Å, Ä, or Ö. Hold down Alt key and, on the keypad, type one of the numbers shown in Table 4-1; make sure NumLk is on. Once the Alt key is released, the letter will appear.

### Translating text, Google Translate:

- **Chrome browser:** highlight text on webpage > click Translate extension icon in browser toolbar.
- **Chrome browser:** click Translate extension icon in toolbar > Enter text or Translate This Page.
- **iPad Google Translate app:** Type or draw text or Converse or Camera.
- **translate.google.com/:** Select Text or Images or Documents or Websites.

### Displaying non-English characters, Excel:

- Open CSV file using Notepad: **File menu:** Save As;
  - > Select 'ANSI' from Encoding field at bottom of window > Save.<sup>1</sup>

### Swedish language resources:

- ▶ “Swedish Genealogical Dictionary,” by P. J. Bladsen and J. C. Huber: Appendix A
- ▶ “Swedish Words & Terms Database” by Caroline Guntur:  
<https://airtable.com/shrQbcaZfQIY7MWbS/tblHeezKKsu3IL7o2/viwYAp9cL4CQzTn85?blocks=hide>

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<sup>1</sup> YouCanBookMe, “How can I get Excel to properly display special characters in the data export?” at YCBM (<https://support.youcanbook.me/article/502-how-can-i-get-excel-to-properly-display-special-characters-in-the-data-export#> : accessed 30 August 2023).

- ▶ “Swedish Historical Dictionary Database, SHDD” at *The Swedish Genealogy Guide*:  
<https://swedishgenealogyguide.com/dictionaries/swedish-historical-dictionary-database-shdd>
- ▶ “Sweden Abbreviations in Family History Sources” at *FamilySearch Wiki*:  
[https://www.familysearch.org/wiki/en/Sweden\\_Abbreviations\\_in\\_Family\\_History\\_Sources](https://www.familysearch.org/wiki/en/Sweden_Abbreviations_in_Family_History_Sources)
- ▶ “Swedish Genealogical Word List” at *FamilySearch Wiki*:  
[https://www.familysearch.org/en/wiki/Swedish\\_Genealogical\\_Word\\_List](https://www.familysearch.org/en/wiki/Swedish_Genealogical_Word_List)
- ▶ Swedish Genealogical Society of Minnesota translation services: [info@sgsmn.org](mailto:info@sgsmn.org)

## Names of Persons

What might seem simple—a person’s name—turns out to be full of complexity. When looking into family history I found there is no uniformity in how names are documented, neither in historical sources nor by genealogists. So here’s what I’ve learned about the rendering of my ancestors’ names, and how I deal with them when recording family history.

First, a birth name establishes the identity of an individual. I use it as my primary referent even if the person was known by another name all their life, and even if a death record uses the more familiar or alternate name. Second, the arrangement of name parts differs with time and place.

A person’s name has five parts in Family Historian: (a) given name, (b) middle name, (c) surname, (d) name prefix or suffix, plus, (e) alternate names and titles. Not every person, obviously, will have all five parts. To help keep track of it all I created a **Names Tab** in the FH7 Individual Property Box (shown in Figure 3-4).

### Given Names and Surname

That individuals are from a patrilineal family with an inherited family name, or surname, is implicit in the GEDCOM specifications. Thus Family Historian has the same built-in bias, and additionally assumes the Anglo-Saxon practice of given names (a.k.a. ‘Christian names’) being followed by surnames: their original market was the United Kingdom. Yet, naming deviates broadly across cultures; not all my Scandinavian ancestors’ names conform to these rules.

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**given name** – the name that is chosen for you at birth and is not your family name.<sup>1</sup>

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In ancient times everyone had only one name, their given name. “Later, in order to differentiate between people with the same given name, a brief description of the person or their origin was added to the given name. For example Olof of the Red Beard, John the Wild, Carl the Red Nose, Anders from Lida or Lida-Anders.... John the Baptist, John the Evangelist, etc.”<sup>2</sup> In many cultures the name of an individual’s father or the farm where they resided began to be added to help distinguish individuals with the same given name. These two additions are known as **patronyms** and **farm-names**.

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**patronym** – a person's last name created from one of their father's given names.

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<sup>1</sup> Cambridge University Press, “Meaning of given name in English” at *Cambridge Dictionary* (<https://dictionary.cambridge.org/us/dictionary/english/given-name> : accessed 30 January 2024).

<sup>2</sup> Hans Högman, “Swedish Naming Practices in Earlier Times, Surnames: Introduction.” at *Hans Högman: History* (<http://www.hhogman.se/naming-practice-sweden.htm> : updated 06 February 2021; accessed 3 March 2021).

Among my Swedish kin, an individual’s given name [*förnamn*] might be a compound name (two or more names that may or may not be hyphenated) and they may have no inherited surname. In the latter case, the name following a person’s given names might be a patronym or a farm-name of which neither is actually an inherited ‘surname.’ Furthermore, both might have been used together as the ending of an individual’s name. Swedes traditionally are not given a middle name.

Table 3-3: FH7 Name Formats

<b>Surname</b>	Surname or ‘last name,’ which may be a patronym or farm-name.
<b>First</b>	First name or first of ‘given names’ when multiple given names.
<b>Given</b>	The given name is the always the first name, unless a ‘name used’ value has been provided, in which case that is the given name, or unless the first name is the surname, in which case the given name is the first non-surname word in the name.
<b>Given All</b>	All given names; i.e., everything except the surname.
<b>Full</b>	Full name.
<b>Surname First</b>	Full name, with the surname first, separated from the rest of the name by a comma.
<b>Preferred</b>	Given name and surname ( <i>see</i> also description for given name).
<b>Adorned</b>	Given name and surname, preceded by name prefix, if any, and followed by name suffix, if any.
<b>Prefixed</b>	Given name and surname, preceded by name prefix, if any.
<b>Suffixed</b>	Given name and surname, followed by name suffix, if any.
<b>Adorned (full)</b>	Full name preceded by name prefix, if any, and followed by name suffix, if any.
<b>Prefixed (full)</b>	Full name preceded by name prefix, if any.
<b>Suffixed (full)</b>	Full name followed by name suffix, if any.
<b>Stored</b>	Displays name exactly as it is stored in FH7 - e.g., ‘John /Smith/’ will display as ‘John /Smith/.’
<b>Soundex</b>	By sorting on a name’s soundex like- sounding names are grouped together. <sup>1</sup>

How I use name parts in FH7 becomes a question of deciding what I wish to accomplish with the name fields, rather than any formal rules about entries. The standard GEDCOM name tag (%INDI.NAME%) can be qualified in FH7 as shown in Table 3-3, which gives me the

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<sup>1</sup> “Names, Name Parts and Name Structures” at *Family Historian User Group – Knowledge Base* (<https://fhug.org.uk/kb/kb-article/names-name-parts-and-name-structures/> : accessed 16 November 2022).

opportunity to customize how names are entered and displayed in Family Historian software. For instance, %INDI.NAME.\_GIVEN-ALL% shows everything except the last name. The underscore in the data reference highlights that this is a non GEDCOM reference, so those modifications “can probably only be interpreted by FH...”<sup>1</sup> Is it okay to allow FH7 to interpret a compound given name as a ‘first’ and ‘middle’ name? I don’t see any alternative. Should I accept that FH7 misinterprets patronyms or farm-names? Yes, I have decided to treat them as surnames.

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**surname** – an inherited family name; last name.

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This conforms to the given name/surname binary established in GEDCOM and keeps consistency, i.e., known individuals have a surname. Family Historian always treats that final name in the Primary Name field as a surname unless I indicate otherwise by marking the more complex surname with /slash characters/. For example, using slashes if both a patronym and farm-name were used or if other circumstances might cause misinterpretation.

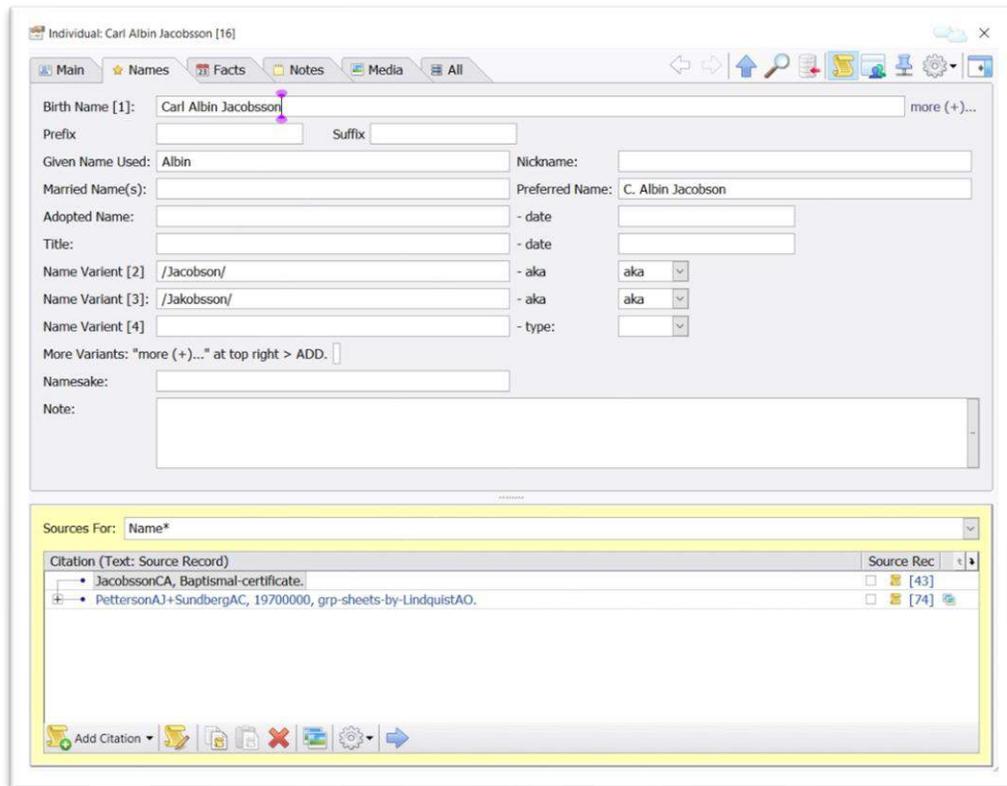


Figure 3-4: Custom names tab.

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<sup>1</sup> “Names, Name Parts and Name Structures” at *Family Historian User Group – Knowledge Base* (<https://fhug.org.uk/kb/kb-article/names-name-parts-and-name-structures/>: accessed 16 November 2022).

### Surname Suffix and Prefix

In many cultures, surname suffixes are common and present a challenge for accurate recording and reporting in genealogy software. I have not encountered surname suffixes unless patronyms are considered such. I enter generational indicators in FH7 as suffixes. Whereas I first used indicators such as Sr. (senior), Jr. (junior), III (the third), and IV (the fourth) as part of the surname, I have since learned that entering them within slashes risks a FH7 query for ‘Ford’ failing to find the surname ‘Ford Jr.’<sup>1</sup>

Prefixes might also denote the prepositional ‘of,’ ‘from,’ ‘son of,’ etc. (e.g., the prefix ‘mac’ in MacDonald denotes ‘son of Donald’). More commonly I use them for titles and honorifics. For instance, my great-grandfather is referred to as “Korpral A. J. Lindquist” in the deed to Korsgården Hadäng; I have entered *korpral* [corporal] as his name prefix in FH7 due to his 27 years of military service. “Civil, military, religious, and professional titles are capitalized when they immediately precede a personal name and are thus used as part of the name (traditionally replacing the title holder’s first name). In formal prose and other generic text, titles are normally lowercased when following a name or used in place of a name....

- “Abraham Lincoln, president of the United States (or President Abraham Lincoln of the United States); President Lincoln; the president
- “General Bradley; the general
- “Cardinal Newman; the cardinal
- “Governors Ige and Brown; the governors.”<sup>2</sup>

### **Alternate Names**

I record all variant names and spellings as found in the genealogical record. Some variants were officially sanctioned, others were the choice of an individual or family, and some were simply erroneous. Even in the last case, keeping track of someone through time requires knowing how their names were recorded.

Corresponding FH7 citations provide the timeframe for when an alternate name was used, or perhaps misspelled, because dates can only be associated with adopted name alternates in FH7. Connected FH7 notes also may include the timeframe that a name part was associated with an individual.

### Nickname

Quotation marks enclose nicknames in their first instance and are dropped for subsequent mentions in text.<sup>3</sup> Nicknames are entered in FH7 as facts using the `Nickname` field of my custom

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<sup>1</sup> “Names, Name Parts and Name Structures” at *Family Historian User Group – Knowledge Base* (<https://fhug.org.uk/kb/kb-article/names-name-parts-and-name-structures/> : accessed 20 July 2023).

<sup>2</sup> University of Chicago Press, “8.19: Titles and offices—the general rule” at *The Chicago Manual of Style Online*; the online edition of *The Chicago Manual of Style*; subscription required: accessed 19 April 2023.

<sup>3</sup> University of Chicago Press, “Citation, Documentation of Sources” at *The Chicago Manual of Style Online; Style Q&A* (<https://www.chicagomanualofstyle.org/qanda/data/faq/topics/Documentation/faq0059.html> : accessed 05 May 2023).

**Names Tab** . Using facts to record nicknames (and married names), rather than other entry options offered in FH7, makes them more likely to be recognized by GEDCOM programs.<sup>1</sup>

### Surname Alternates

My Swedish ancestors might have chosen several surnames during their lifetime depending on changing locations, professions, or simple preference. Elsewhere, individuals might have changed their surnames at marriage or adoption.

Alternate surnames are presented in the order in which they were used during an individual’s life in my practice. Because parentheses modify what comes before, I add alternate surnames in parentheses when writing names in narrative text or in metadata keywords. For instance, my cousin was married twice, first to Billy Collins and then to Eddy Langley. Her name is shown as Georgia Mae Phillips (Collins) (Langley). This is contrary to the widespread practice of putting a woman’s ‘maiden name’ in parentheses **preceding** her married name(s). But grammar and logic both support my choice.

In Family Historian, I enter married names as facts using the `Married Name(s)` field of my custom **Names Tab**. Each surname is within parentheses. I enter multiple married surnames as a single value for each person. As with nicknames, utilizing facts makes married names more recognizable to other GEDCOM-based programs.

### Legal Name Change

A legal process is another way that an individual’s name may have changed during their lifetime, either initiated by them or by others. Using my custom **Names Tab**, I enter a person’s adopted name or name changed by a legal procedure. If an individual changed their name as part of a legally sanctioned gender reassignment process, I make an exception to using their birth name and birth gender as my primary referent. In those cases I use the reassigned gender and name as the referent and the original birth name is entered as an alternate (type = `birth`); the birth gender is noted. I also enter the event in a FH7 custom `_Gender Reassignment` fact, with the date.

### Given Name Used

Family and friends knew my grandfather Carl Albin Jacobsson as Albin. I underline one of a person’s given names in narrative text if that was how they were known but it was not the first of their given names; e.g., Carl Albin Jacobsson. Such an ‘addressed by’ given name is also underlined in Family Historian notes; however, text underlining is not allowed in Airtable entries (except `Long Text` ) or Adobe Bridge. There is a `Given Name Used` field available in my custom **Names Tab** that I use in cases such as with Albin or if an individual was commonly referred to by more than one of their given names: Maria Elizabet, for instance for Maria Elizabet Lindquist.

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<sup>1</sup> Mike Tate [tatewise], “Married Name attribute or type?” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?p=138141#p138141> : posted 05 June 2023; accessed 05 June 2023).

### Preferred Name

I enter a `Preferred Name` in FH7 when an individual consistently used a combination of their names that was not expected. For instance, Carl Albin Jacobsson commonly used his first initial, second given name, and only one ‘s’ in his last name: C. Albin Jacobson.

### Also Known As

Finally, when an individual was generally known in their community as a name **other than their given or nickname** I enter the name in my **Names Tab** and assign the ‘type’ aka .

## Family Relationship Terms

When referring to individuals by name, we often add a familial relationship. I trust in general understanding of the terms mother, father, aunt, uncle, brother, sister, nephew, and niece. How to use them in conversation and text is likewise well understood. However, rendering ‘grand’ and ‘great’ relationships can be confusing. And terms to describe cousin relationships always seem baffling. Yet, I need not untangle cousin terms here, such as ‘third cousin once removed,’ as I rarely attempt their use. Family Historian automatically assigns the correct term should I need to state a cousin relationship; also, *see* name references below.

**Grand** refers to individuals who are two generations apart. For example, a grandparent and grandchild are two generations away. **Great** means three or more generations apart.

Each ‘great’ adds one more generation. A great-grandparent is three generations away because ‘great’ adds one generation, and ‘grand’ adds two generations. Like with grandparents, ‘grand’ with aunts, uncles, nieces, and nephews also means two generations away. Your grandaunt is your grandparent's sister, and you are her grandniece or grandnephew. Many call their grandaunt or granduncle their ‘great’ aunt or ‘great’ uncle. The word varies by family and region.<sup>1</sup>

In our family, we refer to my paternal grandmother's sister as 'great-aunt Guttie.' For clarity, I use grandaunt and granduncle when referencing individuals who are two generations apart: ‘great-aunt Guttie’ is my grandaunt. Similarly I am the granduncle to my nephews’ children.

## Swedish Naming Practices

The age-old custom in Sweden, like other Scandinavian countries, was for a child to take one of their father's given names and add the suffix *-son* [son] or *-dotter* [daughter], depending on whether a male or female. This practice is referred to as the use of primary patronyms. In Swedish an ‘s’ (creating the genitive case)<sup>2</sup> was usually first appended to the father’s name resulting in the double ‘ss’ of Jacobsson, for example. In other words, the individual is identified as Jacob’s son. Surnames changed with each generation and male and female

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<sup>1</sup> Ancestry.com Operations, L.P. (“Ancestry.com”), “Family Relationship Terms” at Ancestry Support ([https://support.ancestry.com/s/article/Understanding-Kinship-Terms?language=en\\_US](https://support.ancestry.com/s/article/Understanding-Kinship-Terms?language=en_US) : accessed 10 November 2023)

<sup>2</sup> Genitive is a grammatical case that marks a word, usually a noun, as modifying another word.

siblings of the same generation had different last names due to the patronymic naming custom that differentiated between genders.

Another result of patronymic naming is that the same male name might occasionally be passed down any number of times in alternating generations. This makes it difficult to know which person is being referenced. For clarity in such cases I add the lifespan of each person to their surname. For example:<sup>1</sup>

- Hans Lasson 1844–1922– great-grandfather
- Lasse Hansson 1911–1991– grandfather
- Hans Lasson 1945–2012– father
- Lasse Hansson 1976– – son

#### Jan/Johan Petter/Peter

Even within the more expected patronymic naming pattern, however, following a surname along Swedish generations is not straightforward. For instance, I was confused by trying to identify **Jan** Peter Andersson, the father of my great-grandfather Anders Johan Petersson. If I had the correct person, why is the son’s patronymic name **Petersson** and not **Jansson**? Genealogist Caroline Guntur explains that in Sweden, individuals often have several given names and any of them might be their ‘addressed-by’ name. And they don’t always come in the order one might expect. “So his name may have been Jan Peter officially, but he might have gone by just Peter or just Jan in everyday life. Similarly [sic] to how many people assume I’m Eva because my full [given] name is Eva Susanne Caroline, but I go by Caroline.... It could also be that it was a double name that should have been hyphenated, i.e., Jan-Peter. Very common in Swedish but because of phonetic spelling and such back then, not always written accurately. If that were the case, Anders Johan would have taken Petersson (the ending) to simplify.”<sup>2</sup>

Confusing the matter more are variant spellings of my ancestors’ names in church and civil records: my great-great-grandfather’s name appears as Johan/Jan Petter/Peter Andersson. Spelling variation was common in everyday life during the past, even in church “records pertaining to the same person and written by the same priest.”<sup>3</sup> It was only in the late 1800s that standard spelling rules began to be enforced in Sweden’s schools and institutions.

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<sup>1</sup> Caroline Guntur, “Part 1: Consistent Conventions,” in the enrolled course Metadata for Genealogy, at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 10 October 2022).

<sup>2</sup> Caroline Guntur [[caroline@theswedishorganizer.com]], Sweden to Bruce Jacobson, email, 19 July 2022, “patronymic custom;” privately held by Jacobson [[results@brucejacobson.com]] Seal Cove, Maine.

<sup>3</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), p. 43.

Table 3-4: Some Interchangeable Swedish Names

Johansson	Jaensson, Jansson, Jeansson, Joansson, Johannesson, Johnsson, Joh:son, Jonasson, Jonsson, Jönsson, (J:son, Hansson) *
Mattiansson	Mathiansson, Mattesson, Matthiasson, Mattisson, Matsson
Olofsson	Olausson, Olovsson, Olsson, Olzon, Ol:son
Pettersson	Pedersson, Persson, Petersson, Petrusson, Pet:son
Anna	Aina, Anita, Ann, Anne, Anette, Annie, Annika, Anny
Britta	Birgit, Birgitta, Brigitta, Brit, Brita
Catarina	Cajsa, Cari, Carin, Carna, Catharina, Catrin, Kajsa, Kari, Karin, Karna, Katarina, Katinka, Katrin
Christina	Christin, Christine, Kerstin, Kirsti, Kristin, Kristina, Kristine, Stina
Elisabet	Betty, Elise, Elsa, Else, Lisa, Lisbet, Kisken
Johan	Jaen, Jan, Janne, Jean, Jens, Joan, Joen, Johannes, John, Jon, Honas, Jöns (Hans)
Margareta	Greta, Maggie, Maret, Margit, Marit, Marta, Märta
Maria	Maj, Maja, Mariana, Marianne, Marie, Marika, Marja, Mary, Mia (Majken)
Olof	Ola, Olaus, Olav, Olle, Oluf
Petter	Peder, Pehr, Pelle, Per, Petrus, Peter, Pär
	* A colon (‘ : ’) was sometimes used to shorten names.

Table 3-4 offers variants for 14 common names.<sup>1</sup> It shows ‘Jan’ as an alternate for ‘Johan’ and ‘Peter’ for ‘Petter.’ The latter substitution is notwithstanding that Peter and Petter are two given names with shared linguistic roots that have differing regional pronunciations in Sweden. Are Jan Peter and Johan Petter referencing the same person? Entries for other household members recorded with him lead me to believe that, yes, my ancestor’s name was simply spelled differently in various records. I settled on Johan Peter for my great-great-grandfather’s given names because that is how his birth record was entered.<sup>2</sup>

All the above leads to my conclusion that the patronymic name for Johan **Peter** Andersson’s male offspring could logically be **Petersson**, with one ‘t.’ His son Anders Johan is, in fact, recorded with both variant spellings. Augusta Otilia “Guttie” Lindquist, Anders Johan’s daughter, uses Pe-**tt**-ersson for him (and his father) in a 1970 family history.<sup>3</sup> The last name is spelled Pe-**t**-ersson in his 1919 parish death record.<sup>4</sup>

<sup>1</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), p. 43.



<sup>3</sup> Lindquist, Augusta O., "Family History: Anders Johan and Anna Charlotta Lindquist"; Jacobson, Lindquist, Phillips Collection, txt00007. Privately held by Bruce Edwin Jacobson, Tremont, Maine. 1970.

<sup>4</sup> Velinga soken, "Död-och Begravningsbok för Welingne församling i Kåkinds kontrakt af Skara stift. Åren 1895-19(38)," (R) F:2 (1895-1938)Image: 48 Page: 40, at *ArkivDigital* (<https://app.arkivdigital.se/volume/v170726?image=48> : accessed 28 May 2021); online death book.

6 Mars 19	1 Maria Gröte Andersson, hemmans- äg. änka från Nybrunn	44 $\frac{6}{7}$		355	Laganfall
7 April 3	1 Anders Johan Petersson - Lindquist, hem.äg. från Hadung Torog.	46 $\frac{13}{10}$	1	30	Kräpta
8 April 20	1 Elisabet Johansson, hushållerska A. Sjögrens dala	74 $\frac{2}{3}$	1	199	Blindtarm- inflammation

Figure 3-5: Death record for Anders Johan Petersson (Velinga, 1919).

I record my great-grandfather as **Anders Johan Petersson**. Ah, but how did his daughter Augusta Otilia acquire the birth surname **Lindquist**?

### Hereditary Surnames

Starting in the 1700s and into the mid-1800s it had become common for middle-class Swedes to follow the practice of nobility in creating surnames that were passed along to the next generation. Lindquist is typical among these ‘ornamental’ hereditary names, which often combine elements related to nature. “Some of the names may appear to describe a real landscape, but the elements are arbitrarily combined.” Other common elements are farm names or combinations with *-man* [man].<sup>1</sup> The elements of Lindquist are:

- *lind* (*linde, linden*) – linden tree from Old Norse, *lind*
- *kvist* (*quist, qvist*) – twig, branch from Old Norse, *kvistr*.<sup>2</sup>

With passage of the Names Adoption Act of 1901, many Swedes decided to ‘freeze’ their primary patronyms as surnames. These are the most common kind of surnames in Sweden; they include Jakobsson (Jacobsson).<sup>3</sup> This is also when women began to adopt their husband’s family names. (A 1920 law required that women take their husband’s surname.)

<sup>1</sup> Judith Pfaff, “Ornamental Name,” at *Nordic Names* ([https://www.nordicnames.de/wiki/Ornamental\\_Name](https://www.nordicnames.de/wiki/Ornamental_Name) : accessed 20 January 2019).

<sup>2</sup> Judith Pfaff, “Surname Elements,” at *Nordic Names* ([https://www.nordicnames.de/wiki/Surname\\_Elements](https://www.nordicnames.de/wiki/Surname_Elements) : accessed 20 January 2019).

<sup>3</sup> Judith Pfaff, “Swedish Surnames,” at *Nordic Names* ([https://www.nordicnames.de/wiki/Swedish\\_Surnames](https://www.nordicnames.de/wiki/Swedish_Surnames) : accessed 20 January 2019).

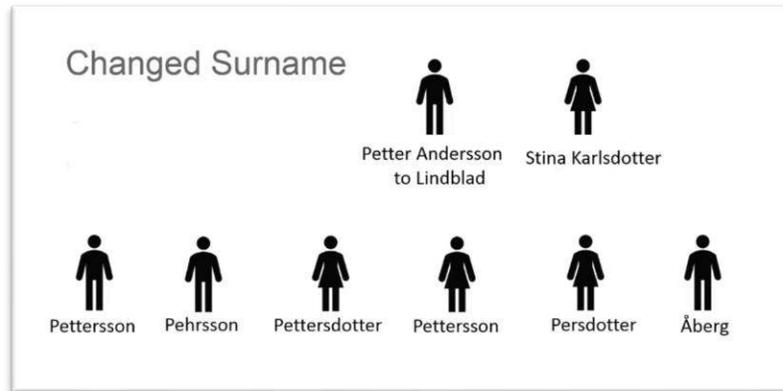


Figure 3-6: Variant surnames in one family. (after G. F. Morris, 2017)

When a father adopted a new family name, not all offspring necessarily chose to use it. A FamilySearch genealogist encountered early 1900s records for the family of Petter Andersson and Stina Karlsdotter. Figure 3-6 illustrates that Petter changed his surname from Andersson to Lundblad and that Petter and Stina’s six children chose various other surnames, including Petters-**son** by one female.<sup>1</sup> None of those choices were unusual as there were no rigid rules around assigning family names in Sweden. If a person wished to go by a different name, they simply informed the parish priest who then used the new name. Individuals commonly changed their last name upon being accepted to a craft guild, joining the military, becoming a member of the clergy, moving to a new farm (thus obtaining a new ‘farm-name’), or being admitted to nobility—and for other reasons. Into the 20<sup>th</sup> century, individuals pretty much used any surname they chose.

#### Military Surnames in Sweden

My great-grandfather, Anders Johan Petersson, took the surname Lindquist as an adult. An informant I met at the Velinga, Sweden, cemetery suggested that the change was due to my great-grandfather’s service in the army, where name changes were common among men with patronymic names. When men lived in the village soldier’s residence [*soldatboställe*]<sup>2</sup>—as was Anders Johan’s home, Dälden—name change was more likely.<sup>2,3</sup> Commonly,

the military assigned non-patronymic names to the rote (the district area in which a particular soldier served) so that they could differentiate between people. Therefore, a soldier’s name was assigned to a person when he was recruited into his position. . . . When a soldier left the military, he would

<sup>1</sup> Geoffrey Fröberg Morris, “Swedish Naming Customs” at *FamilySearch* (<https://www.familysearch.org/en/help/helpcenter/lessons/swedish-naming-customs> : accessed 23 March 2023); Figure 3-6 from Morris’ presentation online to Nordic 2017 Conference is modified slightly here.

<sup>2</sup> I did not record the name of this retired insurance salesman who spoke fine English, had grown up in and eventually bought the vicar’s house alongside the Velinga church and cemetery, and seemed to be a local historian.

<sup>3</sup> Velinga parish register.

sometimes keep this name and sometimes not; it usually depended on how long they had served or been known by that name.<sup>1</sup>

Military names usually reflected the individual’s role as a soldier or sailor, their physical characteristics, or evoked the place where they were located. “Another set of names were [sic] adopted from names of trees such as *al* - alder, *alm* - elm, *ek* - oak, *gran* - spruce, *björk* - birch, *lind* - linden, *syrén* - lilac etc.”<sup>2</sup> After military service a man might use both his military and patronymic names, as did my great-grandfather Anders Johan Petersson-Lindquist. (Though, only the last name Lindquist appears on his and my great-grandmother’s grave marker, without the preceding Petersson). Augusta Otilia Lindquist and her siblings inherited their surname from Anders Johan Petersson-**Lindquist**.

### Foster Surnames in Sweden

When an unmarried Swedish woman gave birth, the girl or boy frequently was given the mother’s family name. Sometimes, the father’s name was assigned if known. If both parents were anonymous, the child commonly took the last name of the family who fostered or adopted them.<sup>3</sup> Using the name of the foster family appears to be the case with Karl Johan Alvar<sup>4</sup> Jansson (Lindquist), the foster son of my great-grandparents. His father is not recorded; his biological mother’s surname was Jansdotter. I include him in the Anders Petersson + Anna C. Sundberg family as the 10<sup>th</sup> child, with ‘f’ appended to his family ID: 03.03-1.10f. I add ‘f’ for a foster child and ‘a’ for an adopted child.

Adoption as a legal way of taking in someone else’s child as their own wasn’t introduced in Sweden until 1917; before that fostering was the only option....The official town foster care board (*Fosterbarnsnämnden*) could place children in foster care where the foster parents received a sum of money for the care of the children.<sup>5</sup>

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### Rendering names of persons, general:

- Use a person’s full name given at birth or christening:
  - ◊ use birth surnames for all females, including married women.
- Enter in the language used at the time of the event being recorded.
- Write each person's name in the normal order in which it is given in their culture.

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<sup>1</sup> Caroline Guntur, “How did my ancestor get a military name?” in enrolled course Searching Sweden Resources Hub, at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 02 February 2021).

<sup>2</sup> Hans Högman, “Swedish Naming Practices in Earlier Times, Surnames” at *Hans Högman: History* ([http://www.hhogman.se/naming-practice-sweden.htm#xl\\_](http://www.hhogman.se/naming-practice-sweden.htm#xl_) : updated 06 February 2021; accessed 3 March 2021).

<sup>3</sup> Caroline Guntur, Illinois [\[\[caroline@theswedishorganizer.com\]\]](mailto:caroline@theswedishorganizer.com), to Bruce Jacobson, email, 07 October 2021, “Orphans”; privately held by Jacobson [\[\[results@brucejacobson.com\]](mailto:results@brucejacobson.com), 39 Hodgdon Road]], Seal Cove, Maine.

<sup>4</sup> Birth record indicates “Alvar” but others use “Halvar,” a Swedish variant of the common given name Halvard; Judith Pfaff, *Nordic Names* ([https://www.nordicnames.de/wiki/Main\\_Page](https://www.nordicnames.de/wiki/Main_Page) : accessed 20 January 2019).

<sup>5</sup> Hans Högman, “Angel Makers - Sweden” at *Hans Högman: History* ([http://www.hhogman.se/angel\\_maker.htm](http://www.hhogman.se/angel_maker.htm) : updated 06 February 2021; accessed 10 March 2021).

- Enter all names in mixed-case letters with same spelling and character spacing as shown on birth record. (The ‘all caps’ style for surnames could alter the name.)
- Capitalize all initials. Insert a period after the initial unless birth or baptismal record does not. Follow the initial and period (or the stand-alone initial) with a single space.
- Use only given name(s) in narratives after intro (except when necessary for clarity or when full name is stated in a record).
- Substitute five underscores for unknown names: John \_\_\_\_\_.
  - ◇ do not use ‘?’ ‘formerly,’ ‘unknown,’ or ‘now’ if names are unknown.
- For generational names:
  - ◇ use Sr. (senior), Jr. (junior), III (the third), IV (the fourth), etc. as appropriate, with no comma following the name and a period after abbreviations.
  - ◇ for repeating generational names add each person’s lifespan years.
- For family relationship terms:
  - ◇ foster – noun forms are open: foster mother, foster father, foster parents, foster home; adjective forms are hyphenated: foster-home background, foster-parent role
  - ◇ grand – compounds are closed: grandmother, grandparent, granddaughter
  - ◇ great – compounds are hyphenated: great-grandmother, great-great-grandfather
  - ◇ half – compound is open when referring to a sibling: half sister, half brother
  - ◇ step – compounds are closed, except with grand and great: stepdaughter, stepsibling, step-grandfather, step-grandparents.<sup>1</sup>
- Titles and honorifics: Follow *Chicago Manual of Style*.

#### Rendering names of persons, narrative text- or Bridge-keywords only:

- Apply above general standards for rendering names.
- Put nicknames by which a person was widely known in double quotes (“ ”) after their middle or last given name.
  - ◇ drop quotation marks for subsequent mentions in text.
- Underline a given name other than first if that was how a person was known, where possible.
- Append alternate surnames to the birth name within parentheses in the order used with no punctuation before or after:
  - ◇ (married name #1) (married name #2)
  - ◇ (adoptive surname) or other (legally changed surname)
  - ◇ (voluntary aliases) – self-selected surnames, stage names, etc.

#### Entering names of persons, FH7:

**Note:** All actions below begin at Individual Property Box: Names Tab.

- Primary Name > Enter the full name, as described above: Rendering names of persons, general.
  - ◇ enter surname within /slashes/ or five underscores within slashes (to show that the final name displayed is not the surname).
  - > cite supporting records.
  - > explain details in notes.

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<sup>1</sup> Maeve Maddox, “Punctuation Review #7: Family Relationships” at *DailyWritingTips* (<https://www.dailywritingtips.com/punctuation-review-7-family-relationships/> : accessed 30 January 2023).

- Enter `suffix`, `prefix`, and `suffix` as appropriate; earned titles—military or professional titles—entered here:
  - ◊ `Dr.`, etc., entered as `name prefix` .
  - ◊ `Sr.`, `Jr.`, etc. entered as `name suffix` .
- Complete `nickname` field as needed.
  - ◊ only one `nickname` field can be added per name in FH7.
  - ◊ separate multiple nicknames applicable to a single name by commas.
- Complete `given name used` when the name a person preferred was one of their names, but not their first (underlined in narratives).
- Enter `married names(s)`, each within parentheses.
- Enter `preferred full name` if the individual commonly used a version other than their primary.
- Enter `adopted name` if appropriate.
  - ◊ add dates, if relevant.
- Enter `variant names`:
  - ◊ add all variant names as spelled in sources, select `aka type`.
  - ◊ select `birth type` if an individual changed their name at gender reassignment.
- Enter `namesake` if appropriate.
- Enter `title` if appropriate; e.g., Lord Beaconsfield.

#### Reporting names of persons, FH7:

- **View Menu:** `Standard Queries > Boys' Names`
- **View Menu:** `Standard Queries > Girls' Names`

#### Flagging twins:

- Open desired diagram/chart: `Select twins > Edit > Record Flags;`
  - > tick `Twin flag` or use `New button`.

#### Examples – Name:

- Carl Albin Jacobsson – ‘addressed by’ given name = Albin.
- Carl Ridgeway “Rick” Jacobson – nickname = Rick.
- Virginia Lee Phillips (Paulucci) (Murray) – successive married names = Paulucci and Murray.
- Carl Johan Halvar Jansson (Lindquist) – adoptive or foster name = Lindquist.
- Anders Johan Petersson (Lindquist) – voluntary alias = Lindquist.
- Anders Johan Petersson-Lindquist – hyphenated surname.
- great-grandfather Anders Johan Petersson – three generations removed (hyphenated).
- John Smith Sr. – generational name; surname = /Smith/ Sr.
- John Smith III – generational name = John /Smith/ III.
- Hans Lasson 1844-1922 and Hans Lasson 1945-2012 – **repeating** generational names; surnames = /Lasson 1844-1922/ and /Lasson 1945-2012/.
- John \_\_\_\_\_ – surname unknown = John /\_\_\_\_\_/.

#### Name resources:

- “Swedish Naming Practices in Earlier Times” by Hans Högman: Appendix G
- “Metadata for Genealogy” by Caroline Guntur:  
<https://www.coursesbycaroline.com>

- ▶ *Nordic Names* wiki: [https://www.nordicnames.de/wiki/Main\\_Page](https://www.nordicnames.de/wiki/Main_Page)
- ▶ “Recording Children with Foster/Adoptive Parents”  
FH7: <https://fhug.org.uk/kb/kb-article/recording-children-with-foster-adoptive-parents/>
- ▶ “Family Relationship Terms” [https://support.ancestry.com/s/article/Understanding-Kinship-Terms?language=en\\_US](https://support.ancestry.com/s/article/Understanding-Kinship-Terms?language=en_US)

## Privacy

At times it is important to protect information about individuals, particularly those still living. I use double square brackets to show that the information within is not to be shared publicly (e.g., `[[private]]` ). This practice applies to both narrative and database entries. FH7 also allows an entire individual’s database RECORD or their facts or notes to be designated as private.

Data flagged as private is excluded by default from exported GEDCOM files; it can be included using settings in the Export Gedcom File Options dialog. When posting GEDCOM files to public sites, I only include living individuals if I know they have given permission or they have publicly posted a tree showing themselves. I include myself in GEDCOM files I publish, most often as the ‘root.’

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### Setting RECORD as private:

- **Main tab** > tick `Private`

### Setting fact as private:

- Select fact > **COG menu** (in bottom toolbar)
  - > `Fact Flag`
  - > `Private.`

### Example – Private data:

- Libby Bischof `[[elizabeth.bischof@maine.edu]]` to Bruce Jacobson, email....

## Locations

**Location** refers to a fixed position on the Earth. One way it is defined is by longitude and latitude coordinates, which identify specific locations independent of any outside reference points. As used in my genealogical research, location has two components: place and address.

## Coordinates

To conform with the structure most commonly used in digital applications, I express latitude and longitude coordinates as decimal fractions of a degree. Decimal degrees are used in GPS and other computer applications to express degrees, minutes, and seconds.

The number of decimal places correlates directly to the level of precision. So... a lat/long rounded up to a single decimal place can accurately identify a country or region, whereas rounded up to two could identify a large city or district. But five decimal places can accurately hone in on [sic] an individual tree, and six can identify a person.<sup>1</sup>

By definition, coordinates locate a fixed point so any place that is an area can only be approximated by dropping a pin somewhere within the shape. I manually plot location coordinates related to family history and save them in Google Earth’s My Places. I only geocode FH7 place entries (rather than address) and have therefore disabled use of the Address field in the Map Life Facts plugin.<sup>2</sup>

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**coordinates** – a group of numbers representing longitude and latitude used to indicate a fixed point on the Earth.

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Any number of geographic systems use coordinates to map locations. For instance, Family Historian uses OpenStreetMap to ‘pin’ locations associated with one or more individuals (*see* Figure 4-1). At first, I used the Map Life Facts plugin to automatically determine latitude and longitude for locations, but now rely on Google Earth Pro where I determine longitude and latitude coordinates manually. Mapping of places is discussed in chapter 4: “Family Places.”

Latitude and longitude are always presented in that sequence, latitude before longitude. Positive numbers indicate a location north of the equator or east of the prime meridian (Royal Observatory at Greenwich, England), and negative numbers indicate south or west. I’ve set my Google Earth and FH7 apps to use decimal degrees, though FH7 only displays coordinates

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<sup>1</sup> “Precision Matters: The Critical Importance of Decimal Places” at *Blis Global* (<https://blis.com/precision-matters-critical-importance-decimal-places-five-lowest-go/> : accessed 18 August 2023).

<sup>2</sup> tatewise (Mike Tate), “Best format of PLACe and ADDRess for Map Geocoding,” at *FHUG: Family Historian Users Group, FHUG Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=11937&p=57617#p57617> : posted 28 December 2014; accessed December 2014), topic 11937 post 57617.

with letters (E,W,N,S) rather than plus and minus symbols. When entering data a FH7 helper dialogue allows use of plus and minus.

---

**geocoding** – the process of determining geographic coordinates for placenames, street addresses, and codes (e.g., zip codes).<sup>1</sup>

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Bridge employs an outdated format for GPS coordinates, e.g., latitude in the form of dd,mm.mmmmN or dd,mm.mmmmS. This arcane formatting requires converting coordinates between Bridge and the standard of decimal degrees. Other users were just as frustrated by entering GPS coordinates into Adobe Bridge metadata as I, and one individual fortunately created an online converter specific to the situation: [kebman.com/misc/gpsConverter.html](http://kebman.com/misc/gpsConverter.html).<sup>2</sup>

## Place

**Place** is a location that has social attributes that make it special or unique, such as jurisdictional or administrative boundaries, or characteristics that engender a sense of human attachment and belonging. While a street or road may not always have ‘place’ characteristics, I decided to include the road or street name as part of place (which aids geocoding) and adopted the ‘Continental style’ of putting the house number after the street so streets are grouped in alpha listings. According to GEDCOM specifications, a place property should hold “the jurisdictional name of the place where the event took place....”<sup>3</sup>

---

**place** – a location that has social attributes that make it special or unique.

---

Names, official boundaries, and functions of jurisdictions change over time—*see* discussion of the two counties Skaraborgs and Västra Götalands in chapter 4. I enter separate PLACE RECORDS for each historical variation I find, and reference name changes in notes, thereby framing a more accurate historical story about an event. (This is unlike my practice of using an individual’s birth name throughout their life even when they may have changed names several times.) Geocoding and standardized place IDs, described below, ensure that I can find all places that have the same location but changing placenames. The coordinates function as the base for unique identifiers. I may enter a combination of modern and historical placenames in a document’s metadata keywords to aid searching.

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<sup>1</sup> The Regents of the University of California, “GIS (Geographic Information Systems): Geocoding” at *Berkley Library, University of California* (<https://guides.lib.berkeley.edu/gis/geocoding> : accessed 03 October 2023).

<sup>2</sup> Krister Brandser, “GPS Coordinate Converter, Google Maps → Adobe Bridge” at *Kebman* (<http://kebman.com/misc/gpsConverter.html> : accessed 05 November 2022). A personal website about technology and programming.

<sup>3</sup> *See* “GEDCOM 5.5.5 Tag Definitions,” Appendix D.

Differing understandings of the meaning of terms further complicates the entry of placenames. For instance, a parish is equivalent to a county in Alaska, Louisiana, and early South Carolina.<sup>1</sup> In Sweden, parishes [*socknar*] functioned as both religious and civil jurisdictions until 1862, when coterminous municipalities were formed.<sup>2</sup>

Placename Hierarchy

Places exist within geographical and, especially for genealogists, jurisdictional hierarchies. Jurisdictions are administered by civil, church, and business authorities, and knowing jurisdictional boundaries helps in finding historical records. Understanding spatial relationships (and people's interactions with the environment) helps position places in the physical world. Places like a homestead, named building, street, or borough and exist within more general places such as a municipality, region, country, continent, or hemisphere. These places could be arranged large-to-small or small-to-large. “The underlying premise is that every place has a unique bounding parent place at any given time.”<sup>3</sup>

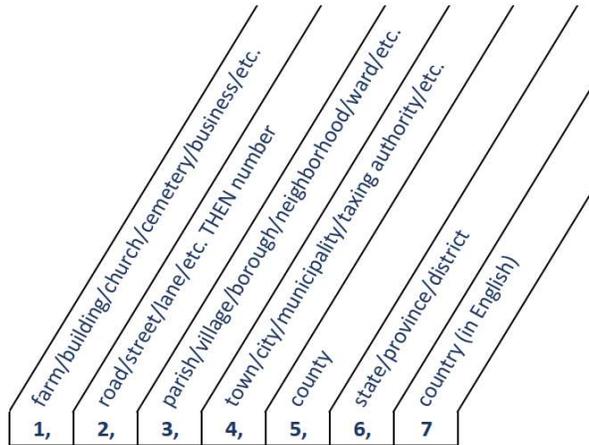


Figure 3-7: Seven placename levels.

I use a combination of geography and jurisdictions in my placename hierarchy, which culminates with countries or kingdoms. Some subordinate levels are recognized only by traditional communities, families, or even individuals. Lacking any accepted standards, the number of levels recorded varies with the genealogist and the software they’re using. I settled on seven levels and follow the norm of going from smallest unit to largest when entering

<sup>1</sup> Lena" Svensson, “What is the difference between a parish and a municipality?” at *WikiTree: Where genealogists collaborate* (<https://www.wikitree.com/g2g/608152/> : response posted 10 May 2018; accessed 28 March 2021), topic 60815.

<sup>2</sup> FamilySearch International, “Sweden: The Parish (Socken)” at *Family Search Wiki* ([https://www.familysearch.org/wiki/en/Sweden:\\_The\\_Parish\\_\(Socken\)](https://www.familysearch.org/wiki/en/Sweden:_The_Parish_(Socken)) : last edited 01 September 2018; accessed 28 March 2021).

<sup>3</sup> Tony Proctor, “Place” at *STEMMA Project* (<https://parallaxview.co/stemma/home/document-structure/place/#PLACE> : accessed 15 June 2021).

placenames in FH7, consistent with GEDCOM 5.5.1 specifications. The name of the smallest unit of the place where an event occurred stands for the hierarchy.

The 3<sup>rd</sup> level of my placename hierarchy holds boroughs, wards, parishes, etc. A descriptor identifies the types of placenames within the 3<sup>rd</sup> level when they may be unclear. For example, a borough is annotated with '(boro),' a Swedish local registration district [*rote*] or settlement [*bygd*] is followed by '(rote)' or '(bygd).'<sup>1</sup> Parishes, or *socknar*, are assumed to be the primary Swedish name in the 3<sup>rd</sup> level so they are not annotated: 'in' ['i'] precedes the parish name when there are multiple types in a 3<sup>rd</sup>-level placename. (See chapter 4 for more about *socknar* and other Swedish civil and church jurisdictions.) The following separators work well within comma-delimited place levels: parentheses, semicolons, or ampersands. That is, a filter for coop would find '&coop' or ';coop' but not '~coop.'

Words designating political divisions of the world, a country, a state, a city, and so forth are usually capitalized in narratives when they follow the name and form an accepted part of it. They are lowercased when they precede the name or stand alone. In all cases, I record placenames as found in genealogical records. Abbreviations are to be avoided so I use the full placename if known, with the abbreviation noted.

Because placename is not one of the six 'zero-level' types of GEDCOM data, it can only be associated with other data. It does not stand at the top of the GEDCOM hierarchy and there is no central list of places in a GEDCOM file.

#### FH7 Place Records and Named Lists

A PLACE RECORD is created in Family Historian using an event or attribute associated with an individual or family. I created the custom attribute `_New PLAcE` and an `'/ADD LOCATION/'` fake individual as a work-around for times when I just want to add a new place. A PLACE RECORD can thus be produced by associating it with the fake individual. Five years later, in 2024, I discovered that a new PLACE RECORD can more easily be created by right clicking in some white space in the Places Tab of the Records Window, then choosing New Place. The place must be linked to an individual via a fact to show in some common reports.<sup>2</sup>

I keep two FH7 named lists for PLACE RECORDS because some source citations require entering the city and state or sometimes just the county. Contrary to my general rule, I treat Swedish *socknar* [parishes] as towns in the list 'CITY,State/Län place' if the place is not in a city such as Stockholm and I treat *län* [counties] as U.S. states because that is how they have more or less functioned historically. *Län* are treated normally for the 'COUNTY place' named list, however (without listing the *landskap* or province).

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<sup>1</sup> Caroline Guntur, "Swedish Words & Terms Database" acquired from the enrolled course Searching Sweden (<https://www.coursesbycaroline.com> : accessed 15 July 2023).

<sup>2</sup> [ColeValleyGirl], "Re: How do I set up a 'place' independently?" at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?p=144766#p144766> : posted 22 February 2024; accessed 01 March 2024).

### Placenames in Sweden

The use of compound words in the Swedish language applies to many historical Swedish placenames. Their meaning might be fully understandable using modern definitions: for instance, *holm* [island] is part of the name of Sweden’s capital city which is built on islands: Stockholm. (Why *stock*, or *log*, is part of the name remains obscure.)

Farms in Sweden have always had individual names, often even identical for farms in close proximity. There are at least two Korsgården places and multiple places named Hulegården within Hadäng rote i Velinga—one of each name is associated with the Petersson + Sundberg family. Torp is another example: “The word today means ‘smallholding,’ but is believed to have once had a wider meaning, that of a dwelling place in general, or a village.”<sup>1</sup> Farms were usually spread out and if a farm village existed, it was generally small.

A farm, village, parish, or town placename may hold genealogical information. It may refer to an event or person, even though the connection is no longer clear. For example, Svensrud means ‘the land that Sven cleared’ from adding *-rud* (*-red*, *-ryd*) [new land] to the male given name.<sup>2</sup> Finally, to understand the parts of other placenames one must look not only to Swedish, both modern and ancient, but also to Finnish, Sami, and old English.

I must also be mindful of old and new spellings, and abbreviations. For instance, the spelling of my paternal grandmother’s home parish, Velinga, officially changed from ending with ‘e’ in 1940. More generally, standards for how letters in the Swedish alphabet were used meant that spelling of my great-grandmother’s parish changed from ‘Hvarf’ to ‘Varv’ when all uses of ‘hv’ were converted to ‘v’ about 1906.<sup>3</sup> The county where both parishes are located was sometimes abbreviated: Skb:l for Skaraborgs län.

My grandmother, Anna Vitalia Lindquist (Jacobson), moved from Velinga to Stockholm for about a year when she was 21, from December 1899 to November 1900. I found an entry in the records for Stockholm that showed she relocated to Grävlingen 11 in the Jakobsroten, or Jakob district. Web searches led me to believe that Grävlingen was the name of a city block or large building, several of which I located with that name in Swedish cities. But I was confused because online Swedish-English dictionaries translated *grävlingen* as ‘badger,’ the animal.

Turns out I had it right: it does mean badger and it is the name of a city block! “In Stockholm (as well as in other cities around the country), city blocks are often named after cute animals, flowers, or other parts of nature.” The naming system was used before many street names existed; people would have stated the block name as the location of their

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<sup>1</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), p. 35.

<sup>2</sup> Fredrik Haeffne, “SWEGGate Swedish Dictionary, Special dictionaries/Encyclopaedias” at *RootsWeb* (<https://sites.rootsweb.com/~swewgw/Geogr/thGeoNames.htm> : accessed 29 October 2022).

<sup>3</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), p. 46.

residence. “Sometimes, if there was a large building that took up an entire city block, the name could refer to the building itself, but most often, it was the block followed by the building number. In this case, ‘Grävlingen’ would be the block, and 11 the building number.”<sup>1</sup>

Standardized Place IDs

I’ve adopted a coordinate-based ID system that allows me to assign unique identifiers to locations associated with my family; I enter them in the FH7 Standardized Place field. They are useful where placenames have changed: IDs allow those locales to be identified as the same place through time. The system employs the number of decimal places in location coordinates in relation to my placename hierarchy, as shown in Table 3-5, to indicate geographic scale, i.e., a country vs. a building. I reserve up to up to six decimals for places.

Table 3-5: Coordinate and Place ID Precision

ID SCHEME	DECIMAL PLACES	PLACENME HIERARCHY ASSIGNMENT	OBJECTS RECOGNIZABLE <sup>2,3</sup>
10.	0	continent, ocean	continent, ocean ≈ 1000 km/620 mi
1.	0	<b>7<sup>th</sup></b> – country, kingdom	country ≈ 111 km/69 mi
1.	0	<b>6<sup>th</sup></b> -state, province, region	state, region ≈ 111 km/69 mi
0.1	1	<b>5<sup>th</sup></b> – county	large city; administrative district ≈ 11.1 km/6 mi
0.01	2	<b>4<sup>th</sup></b> - town, city, municipality, etc.	city, town ≈ 1.11 km / 62 mi
0.001	3	<b>3<sup>rd</sup></b> - village, borough, neighborhood, parish, local district, ward, etc.	neighborhood, village large parcel of land; ≈ 111 m/328 ft
0.0001	4	<b>2<sup>nd</sup></b> - road, street, city block	cul-de-sac ≈11.1 m/33 ft
0.00001	5	<b>1<sup>st</sup></b> - farm, house (w/ or w/o street no.), cemetery, church, named building, etc.	individual trees, structural details ≈1.11 m/3 ft
0.000001	6	apartment, room, grave	(human) ≈ 11.1 cm/4 in

Blue text indicates association with my placename hierarchy (see Figure 3-7).

<sup>1</sup> Caroline Guntur, Sweden [[support@theswedishorganizer.com]] to Bruce Jacobson, email, 23 April 2023, “https://v5.airtableu...;” privately held by Jacobson [[results@brucejacobson.com]], Seal Cove, Maine.

<sup>2</sup> Wikimedia Foundation, “Decimal degrees” at *The Free Encyclopedia* (https://en.wikipedia.org/wiki/Decimal\_degrees : last edited 03 October 2021; accessed 08 November 2021).

<sup>3</sup> StackExchange, “Measuring accuracy of latitude and longitude” at *Geographic Information Systems StackExchange* (https://gis.stackexchange.com/questions/8650/measuring-accuracy-of-latitude-and-longitude : accessed 07 February 2023).

I generally find IDs for places that sit at the lower end of my hierarchy most useful: a farm, for example. However, they’re helpful when any territorial boundary or name has changed. There is some fluidity between my 6<sup>th</sup> and 7<sup>th</sup> levels, which have no decimal places. While perhaps imprecise, the place ID system meets my needs.

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**Recording placenames, text and FH7:**

- ◇ Use name as it was known when the event took place; never use ‘formerly’ or ‘now.’
- ◇ Use spelling as in the original except for country, which is spelled in English.<sup>1</sup>
- ◇ Use full name of each place level rather than abbreviations, except for long country names—the countries United States of America, United Kingdom, and Union of Soviet Socialist Republics are abbreviated as USA, UK, and USSR, respectively.
- ◇ Spell out northeast, southwest, etc.
- ◇ Follow U.S. Board of Geographic Names style for USA placenames; no apostrophe with possessive names.
- ◇ Plural generic term is not lowercased when it follows proper placenames, e.g., Hancock and Waldo counties.
- ◇ Born/baptized/died/buried **at a parish, village, town, or city.**
- ◇ Born/baptized/died/buried **in a county or state** if the town is not known.

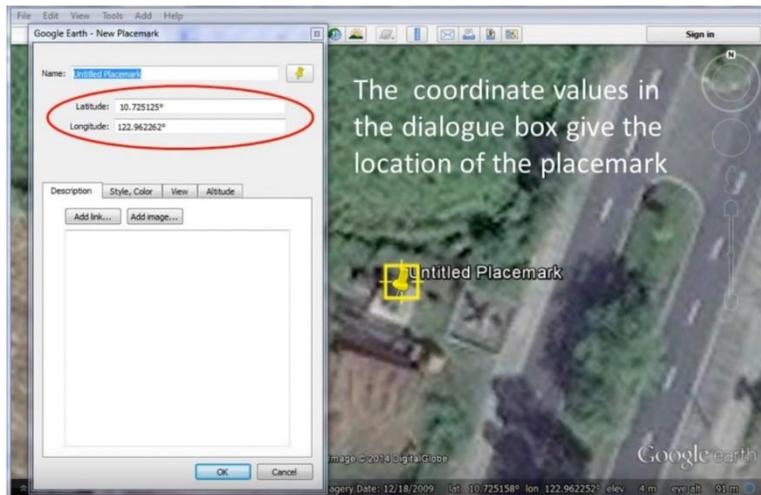


Figure 3-8: Google Earth placemark dialogue.

**Recording coordinates, text and FH7:**

- Positive number = north or east of prime meridian; negative = south or west, negative sign must come at the beginning of the number.
- Six or seven places to the right of the decimal are usual (though standardized place IDs may use fewer).

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<sup>1</sup> Gary Mokotoff, “A Proposed Standard for Names, Dates and Places,” in *AVOTAYNU*, XXIV (Number 3 Fall 2008, retrieved from [http://jgsob.org/AVOTAYNU\\_XXIV\\_3.pdf](http://jgsob.org/AVOTAYNU_XXIV_3.pdf)), PDF.

- Latitude values require no more than 3 spaces to the left of the decimal, while longitude values may use up to 4.
- Use neither degree symbols (°) nor letters for east, west, east, or south.

### Finding coordinates, Google Earth:

- **View:** Toolbar or Sidebar > Locate place in Google Earth Pro (Google has stopped supporting Pro).
- > select `Add Placemark` from the **menu** bar and position Untitled Placemark at focus place > edit in New Placemark Dialogue Box; see Figure 3-9.
- > Copy coordinates from New Placemark Dialogue Box; ignore degree symbols.<sup>1</sup>

### Entering Place, FH7:

#### Method A

- **Fact Window:** Enter historic placename in the Place field.

#### Method B

- `/ADD LOCATION/` fake individual > add `_New Place` fact.

#### Method C

- Records Window: **Places Tab**: > `New Place`.

#### ALL Methods

- ◇ use **both** the `Place` and `_New PLace` fields.
- ◇ Use seven parts for **every** placename entry as shown below and in Figure 3-7:
  - 1<sup>st</sup>** farm/estate/cemetery/church/named building/named business/etc.,  
*gård | säteri | kyrkogård | kyrka,*
  - 2<sup>nd</sup>** lane/road/street/city block, etc. THEN building/street number if used,  
*körfält | väg | address | stadskvarter,*
  - 3<sup>rd</sup>** settlement/village/hamlet/borough/neighborhood/parish/local district/ward/etc.,  
*bygd | rote | församling | socken | pastorat,*
    - ◇ Annotate any ‘boro,’ ‘bygd,’ ‘rote,’ etc. within following parentheses.
    - ◇ precede any Swedish parish holding multiple places with: ‘i [in/at] socken’
  - 4<sup>th</sup>** town/city/municipality/regional district/etc.,  
*kommun | registeringsdistrikt | härad,*
  - 5<sup>th</sup>** county,  
*län,*
  - 6<sup>th</sup>** state/province/region,  
*landskap,*
  - 7<sup>th</sup>** country, rendered in English.  
Sweden.
- ...FH7 **Tool Menu**: `Work with Data` > `Place`:
  - ◇ copy and paste coordinates in decimal degrees.
  - ◇ complete additional `Place Note` information as needed.
  - ◇ separate each component with a comma and space; insert a space and comma for any unknown place level.

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<sup>1</sup> Rwlante YouTube Channel, “Extract Coordinates (Lat/Long) from Google Earth” at *GIS & GPS Tips and Techniques, YouTube* (<https://youtu.be/xED5dopViyM> : 2014; accessed 17 October 2021).

- ◇ separators within components: semicolon ( ‘ ; ’ ), ampersand ( ‘ & ’ ), or parentheses.
- > If known, enter street (or block) name followed by street number without punctuation.
- > Enter place ID as `Standardized Version`.
- > Add to My Google Places list, if named in Google Earth.
- > Media > Add photo.
- > For use in some SOURCE RECORDS:
  - ◇ ‘CITY,State’ named list – treat *län* [county] in Sweden as state components; treat *socknar* [parishes] as towns.
  - ◇ ‘COUNTY’ named list – sequence *län* [counties] normally, as county components.

Reporting places, FH7:

- > **Tools Menu:** `Work with Data > Places...` .
  - ◇ Displays seven placename levels in columns.
- > **Tools Menu:** `_Place References`
  - ◇ Prompts for a list of places and reports all associated people and addresses.
- > **Publish Menu:** `Custom Reports > Place List`.
- > **View Menu:** `Record Lists > Places`.
- > **Query Menu:** `> Facts and Events > Events Near Place`
  - > `Place > Max. Distance (miles)`.
- > **View Menu:** `Custom Queries > Places-BJ (copy)` . > `Select Place Qualifiers.???`
  - ◇ `Tidy` – The full place details are displayed, but extra commas are removed **OR**
  - ◇ `Full` – The full place details are displayed (default)

The above two options modify how places are displayed (Short and Medium qualifiers are of little utility): I choose Tidy.

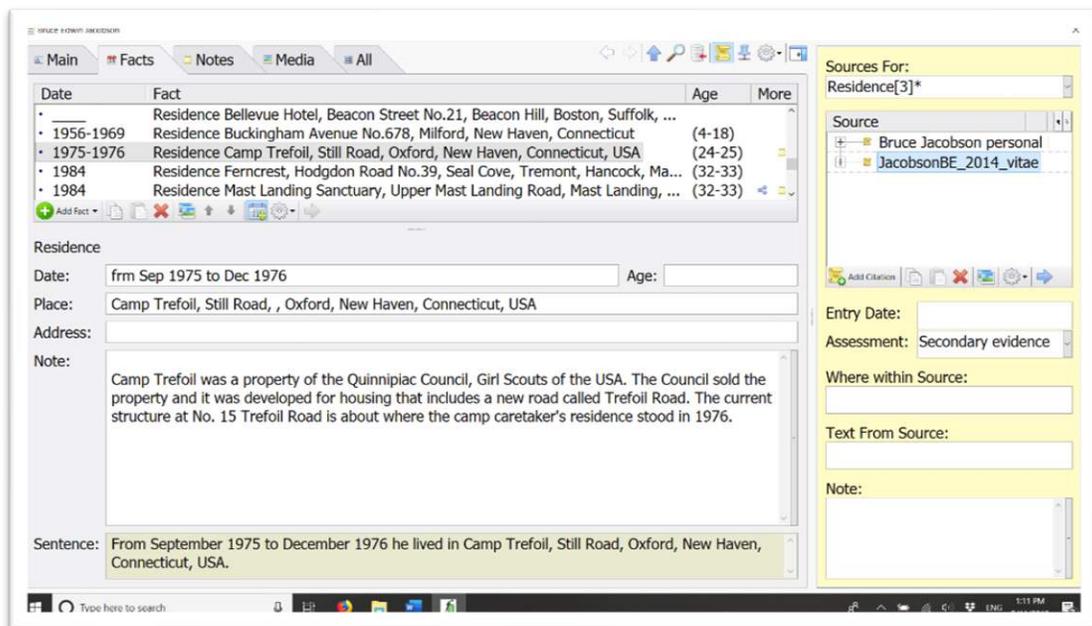


Figure 3-9: Entering place, FH7.

### Examples – Place

- Bellevue, Beacon Street 21, Beacon Hill, Boston, Suffolk, Massachusetts, USA
- Ferncrest, Hodgdon Road 39, Center, Tremont, Hancock, Maine, USA
- Dälden, , Hulegården (bygd) Hadäng (rote) Vellinge, , Skaraborg, Västergötlands
- „,Boston,,Massachusetts,USA – FH7 ‘CITY,State’ place named list.
- „,,Västra Götalands län,,Sweden – FH7 ‘COUNTY’ place named list.
- **at** Milford, New Haven County, Connecticut – street or town named.
- **in** New Haven County, Connecticut – only county or state named.
- northwestern Montana – rather than NW Montana.
- Youngs Mountain or Swans Island – no possessive apostrophe in U.S. placenames.
- Chamberlain and Churchill lakes, Hancock and Waldo counties – capitalization rule.
- Washington State; the state of Washington – capitalization rule.
- Hancock County; the county of Hancock – capitalization rule.
- New York City; the city of New York; New York State – capitalization rule.
- Second Congressional District; her congressional district – capitalization rule.
- Massachusetts Bay Colony; the colony at Massachusetts Bay; but District of Maine – capitalization rule.

### Examples – Standardized Place ID:

- 41.30,-72.92 – New Haven (city)
- 58.102,13.966 – Vellinga (parish)
- 59.3343,18.0663 – Grävlingen (city block)
- 41.21669,-73.06524 – Milford Hospital (building)
- 42.358517,-71.062271 – Bellevue 11k (room)

## Address

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**postal address** – location to which letters, packages, etc. are directed to a particular recipient; may be different than street address.

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I use **address** to mean the postal address [*postadress*] that directed traditional mail (letters, packages, etc.) to a particular recipient, entered in the structure found in the genealogical record cited.<sup>1</sup> My own residential street address has often differed from my mailing address. Consequently, online databases sometimes list my residence as that of the post office, rather than the municipality in which I resided. (I use PLACE RECORDS to log residence.) I created a custom Family Historian fact type for completing address entries with six parts. The mailing address is captured in my Postal Address (labeled `_Postal SHORT`) fact.

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### Entering postal address, FH7:

- Open Focus Window for an individual or use /ADD LOCATION/ fake individual;

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<sup>1</sup> See “GEDCOM 5.5.5 Tag Definitions,” Appendix D which states that an Address “should be formed as it would appear on a mailing label...”.

- > **Fact Tab** (in Focus Property Box): Add Fact > `_Postal SHORT` from the dropdown list;
- > Complete Address field, using postal abbreviations without periods:
  - (1) street number and street (in the order normally used)/post office box
  - (2) apartment/floor/suite
  - (3) city/town/post office
  - (4) state/province abbreviation
  - (5) zip code/postal code
  - (6) country abbreviation.
- ◇ Separate address components by commas; insert a space and comma for any unknown address element.
- > Enter short version of address, including postal code (e.g., PO Box, 100 04660 or 21 Beacon, 02108), in `_Postal SHORT` field.

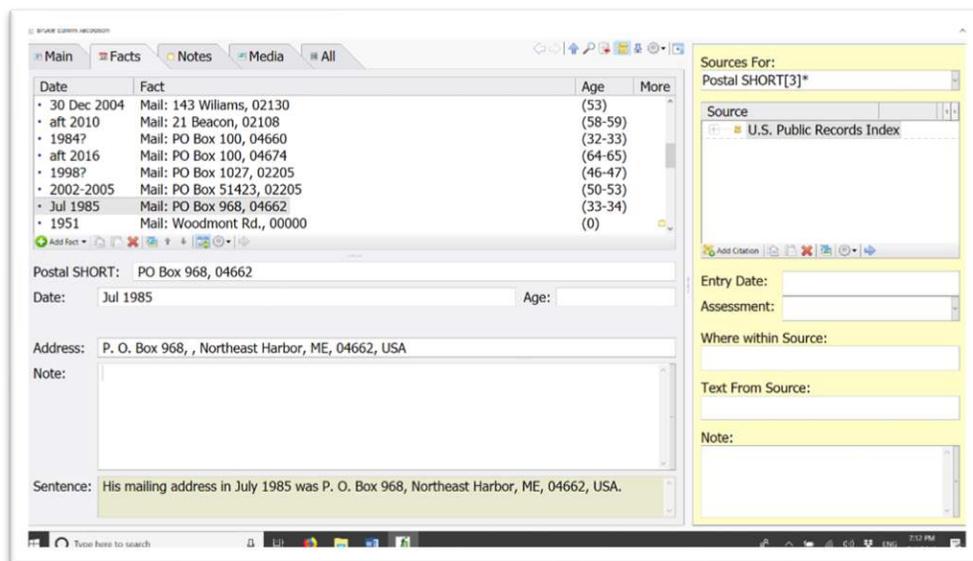


Figure 3-10: Entering address, FH7.

### Examples – Postal address:

- PO Box 100, , Mount Desert, ME, 04660, USA
- PO Box 100, 04660 – Postal SHORT.
- 21 Beacon St, Apt 11k, Boston, MA, 02108, USA
- 21 Beacon, 02108 – Postal SHORT.
- Woodmont Rd, RFD – Postal SHORT, no street number or postal code.

### Reporting addresses, FH7:

- **Tools Menu:** Work with Data > Addresses...

### Location resources:

Placenames Databases

- ▶ Ortnamnsregistret [Swedish placenames directory, 1950]:  
<https://ortnamnsregistret.isof.se/place-names>

- ▶ The GeoNames geographical database at *Geonames* holds more than eleven million placenames: <https://www.geonames.org/>

#### Glossaries

- ▶ Swedish Geographic Terms Glossary database compiled by Bruce Jacobson: <https://airtable.com/appWRCxdSiTWrv9Bi/tblCMlz4AoJqVPzWO/viwMNcjLbefGyXikg?blocks=hide>
- ▶ “SWEGGate Swedish Dictionary, Special dictionaries/Encyclopaedias” by Fredrik Haeffner (words found in modern Swe-Eng dictionaries are not included): <https://sites.rootsweb.com/~swewgw/Fact/Dict/facdic02.htm>
- ▶ Rosenberg's geographical dictionary (Sweden) at *Riksarkivet*: <https://sok.riksarkivet.se/rosenberg>
- ▶ “Searching Sweden: Words and Terms database” by Caroline Guntur: <https://airtable.com/shrQbcaZfQIY7MWbS>

#### Coordinates

- ▶ “Symbols for degrees, minutes and seconds” at *Map Tools*: [https://www.maptools.com/tutorials/lat\\_lon/formats](https://www.maptools.com/tutorials/lat_lon/formats)
- ▶ GPS coordinates to address converter to address: <https://www.gps-coordinates.net/gps-coordinates-converter>
- ▶ “Degrees Minutes Seconds to/from Decimal Degrees” at *Federal Communications Commission*: <https://www.fcc.gov/media/radio/dms-decimal>
- ▶ “GPS Coordinate Converter, Google Maps → Adobe Bridge” by Krister Brandser: <http://kebman.com/misc/gpsConverter.html>
- ▶ ISO Country Codes at *International Organization for Standardization (ISO)*: <https://www.iso.org/obp/ui/#search>

## Residences and Travels

I consulted GEDCOM standards and various online forums to sort out how I would document emigration/immigration and other changes of residence by my ancestors. I then considered how to treat their travel, keeping in mind transferability to other genealogical programs.

### What’s the Difference?

To move from one place to another is to **migrate**. If the move is long term and within one’s home country, it is treated in GEDCOM as a change of **residence**. To **emigrate** is to migrate out of a country to establish residence elsewhere; to **immigrate** is to migrate in. “For this reason, the word emigrate is commonly followed by from and the home country, whereas immigrate is commonly followed by to and the destination country.”<sup>1</sup>

Emigration and immigration are two sides of the same coin: one cannot immigrate without having already emigrated. Immigration, however, is quite often considered from a broader policy perspective, considering movement of populations rather than the movement of an individual or family from one country to another which is more the concern of genealogy.

---

**emigrate** – the act of leaving a resident country or place of residence with the intent to settle elsewhere (to permanently leave a country).<sup>2</sup>

**immigrate** – the act of coming into a country of which one is not a native to live permanently.<sup>3</sup>

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The following GEDCOM definitions are similar to those more generally accepted, like the ones above that rely on *Miriam-Webster* and *Oxford* dictionaries:

- EMIGRATION – “An event of leaving one's homeland with the intent of residing elsewhere.”
- IMMIGRATION – “An event of entering into a new locality with the intent of residing there.”<sup>4</sup>

A major flaw with all these definitions is that they rely on knowing my ancestors’ intent. Intent is rarely entered in the historical record for common folk such as my kin! Supposing I knew my ancestors’ intent was to reside in a new country, how **long** did they intend to live there? Was it a **permanent** move? Many individuals came to America, for instance, to earn

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<sup>1</sup> Dictionary.com, LLC, “emigration: More About Emigration” at *Dictionary.com* (<https://www.dictionary.com/browse/emigration> : accessed 07 April 2023).

<sup>2</sup> Wikimedia Foundation, “Emigration” at *Wikipedia, The Free Encyclopedia* (<https://en.wikipedia.org/wiki/Emigration> : accessed 07 April 2023).

<sup>3</sup> Wikimedia Foundation, “Immigration” at *Wikipedia, The Free Encyclopedia* (<https://en.wikipedia.org/wiki/Immigration> : accessed 07 April 2023).

<sup>4</sup> See “GEDCOM 5.5.5 Tag Definitions,” Appendix D.

money with the goal of returning to their homeland. Was their stay in America a temporary change of residence? Further, what was the place of departure: their home parish or the place where they left their country’s soil? And what date do I choose: when a family left their domicile or when they boarded a ship or plane? Protocols for recording emigration and immigration are ill-defined throughout genealogy.

## Residence

Residence, in GEDCOM parlance, is focused on location. It is defined as: “An address or place of residence that a family or individual resided.”<sup>1</sup> I use place (rather than address) for the location of residence when I enter FH7 data. Time also comes into play when considering residence, as seen in the following dictionary definition.

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**residence** – the act or fact of dwelling in a place for some time.<sup>2</sup>

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Family Historian entries, including for residence, reference time through associated dates. As discussed in the Numbers, Dates, and Times of Day section of this chapter, FH7 allows for entering five kinds of dates. Among those, a single date, a period, or a range might be right for annotating residence. In most cases I enter each instance of a single date for residence, following reasons expressed in the Family Historian User Group forum. One commenter argued for creating a single fact with a date range for repeats of the ‘same’ place because it is less repetitious. “That said, if the repeat covers a considerable amount of time,” he continues, “then I find I sometimes can’t see the current residence at some point because it’s futher [sic] back inside a date range fact.”<sup>3</sup>

Nick Walker states a different argument, one shared by others in the forum that swayed me toward entering residence dates individually.

Personally I like to have separate residences because it helps me to see all the various ‘snapshots’ in time for each time a source indicated to me that the person was living in that location. If I combined a lot of residences into one and have all the various citations link to that residence and then came across another record that showed they lived elsewhere for some time in the middle of that period I’d then have to split the residences again (into two) and then separate out the citations again. The downside to having multiple residences is that it can make reports seem very repetitive, but this is something that I’d rather was solved by

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<sup>1</sup> See “GEDCOM 5.5.5 Tag Definitions,” Appendix D.

<sup>2</sup> Merriam-Webster, Inc., “residence” at *Merriam-Webster.com* (<https://www.merriam-webster.com/dictionary/residence> : accessed 11 April 2023).

<sup>3</sup> Adrian Bruce [AdrianBruce], “Residence” topic 132947 at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=21439&p=132947#p132947> : 12 Jan 2023 ; accessed 18 Jan 2023).

improvements to reporting rather than having to change the way the data is recorded.<sup>1</sup>

Some individual genealogical records for residence, however, span a period of time such as those in Swedish church household examination rolls. It makes sense to enter them as found, for a period.

## Emigration-Immigration Dates

Emigration and Immigration facts document permanent moves by an individual or family. For the date of emigration I record the date that an individual or family left their homeland (i.e., country or kingdom) with the assumed intent of permanently living elsewhere. That would be the date recorded in a ship’s passenger manifest or on an airplane boarding pass or, in 19<sup>th</sup>-century Sweden, an entry in the police log at the port of departure.

If I know from the genealogical record that a fixed duration was envisioned when leaving home and the intent was not to emigrate or otherwise change permanent residence, I record the details in a custom travel fact I created (`Travel`).

For Swedish emigrants I use the church books (household examination rolls and moving in/moving out records) to corroborate the year for emigration, but not the specific date as the entry is not necessarily the day when the individual left their home country. The date of emigration and the date of immigration are usually not the same either, especially in older records when travel took longer. A commenter on the FHUG forum enters just “one end of the journey,” only for emigration.<sup>2</sup> This doesn’t make sense to me as departure and arrival are two distinct events with a distinct journey in between. GEDCOM treats them as separate events. Plus, there may be separate types of records for emigration and immigration. And, other events may have occurred during the journey, such as marriage or childbirth on a ship, which might then appear out of place in a timeline.

## Emigration-Immigration Places

Like dates, the place my ancestors left their home country is the place I record for emigration. The port of entry in their new country is the place I record for immigration, rather than the place they may have eventually settled. GEDCOM only allows a ‘to’ place for emigration and a ‘from’ place for immigration. However, Family Historian offers a `from` and a `to` field for each emigration and immigration fact; both places may not be supported by other software. I agree with the following viewpoint and do not use both fields in any one FH7 database RECORD.

From a purely GEDCOM standpoint I don’t understand where a FROM and TO location can be entered! I only see one place to enter a location that makes sense!

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<sup>1</sup> Nick Walker [NickWalker], “Residence” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=21439&p=132947#p132947> : 12 Jan 2023 ; accessed 18 Jan 2023)

<sup>2</sup> Adrian Bruce [AdrianBruce], “Emigration Fact - Copying and Using Both Copies” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=21346> : 24 Dec 2022; accessed 18 Jan 2023).

In GEDCOM v5.5.1 the EMIG tag (old domicile) and IMMI tag (new domicile) would have single PLAC and DATE tags.... There are at minimum 2 GEDCOM events (EMIG and IMMI) each with a place and a date....<sup>1</sup>

So, I complete either ‘to’ or ‘from’ in FH7, depending on which is appropriate, and record the in-between journey in my custom `Travel` fact.

## Travel

I record the journey from one’s primary residence to other places in my custom `Travel` fact when there are overnight stays and the trip is of significance—say, emigration or a pilgrimage to ancestors’ graves. For example, on 20 April 1902, my grandfather Carl Albin Jacobsson (Jacobson) left his Swedish hometown of Norberg, Västmanland, aboard a train headed west. The next day he **emigrated** from Göteborg where he boarded a ship and then 10 days later, on 4 May, **immigrated** to Ellis Island where U.S. authorities processed him as an immigrant. After an overnight stay at a settlement house he found more permanent housing in Brooklyn’s Park Slope neighborhood at Warren Street 670, Brooklyn. He had **traveled** to Park Slope during the period 20 April to 05 May 1902 with overnight stays at Göteborg, Liverpool, and Brooklyn (at the settlement house). Travel events found in genealogical records are usually to a country that is not then an individual’s or family’s permanent residence.

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**travel** – journey from one’s primary residence to other places when there are overnight stays and the trip is of significance.

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Given that only one place can be entered in `Travel`, I use the primary or most-distant destination. In most cases return to an individual’s home base is assumed; outbound and inbound legs are entered separately only if each was in some way significant. I usually use a date range to cover the length of each trip. I cite passenger lists, etc., as sources and include entry and exit ports, stopovers, and methods of travel in linked notes.<sup>2</sup> Fellow travelers are included as FH7 ‘witnesses’ when entering a `Travel` fact. The principal is added as a witness too, for structuring narrative sentences generated by FH7.<sup>3</sup>

In creating the custom `Travel` fact I enabled an Auto-Create Note function to hold meta-field note labels for recording overnight stays. The notes are in double square brackets ( `[[ ]]` ) meaning they will not appear in notes when privacy is enabled, but do appear in

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<sup>1</sup> [KFN], “Emigration Fact – Copying and Using Both Copies” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=21346> : 27 Dec 2022; accessed 18 Jan 2023).

<sup>2</sup> [AndyHatchett], “Documented standards for genealogy data entry” at *StackExchange: Genealogy and Family History* (<https://genealogy.stackexchange.com/questions/2562/documented-standards-for-genealogy-data-entry/2564#2564> : 09 December 2012; accessed 20 January 2023).

<sup>3</sup> Helen Wright [ColeValleyGirl], “Re: Travel” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?p=135729&hilit=witness+travel+witness#p135729> : accessed 30 March 2023).

report sentences. I add the reason for the travel in a `{cause}` field which then appears in FH7 reports. *See* actual report sentence examples for my travels below.

#### Recording emigration and immigration:

- For emigration, use date and place of departure from homeland rather than residence.
- For immigration, use date and place of arrival at port of entry in new country rather than final destination.
- Enter ‘from’ place for emigration and ‘to’ place for immigration.
- Use FH7 `Travel` fact when the international travel is for a fixed duration rather than a permanent move.

#### Entering travel, FH7:

- **Fact Tab of Property Box: Add Fact;**
  - > `Travel`: Enter general region and purpose of trip (the `{value}`);
  - > `Date`: Usually a period, never a single day;
  - > `Place`: Enter primary or most-distant destination;
  - > `Note`: Edit with add overnight stays or delete meta-field notes;
  - > `Add witnesses`: `fellow traveler` or `traveler` for principal individual
- **All Tab of Property Box: Right Click on fact:**
  - > `Add Cause`: Enter reason for the travel;
  - > `Add Note`: Enter second linked note if needed when meta-field note being used for overnight stays.

#### Examples – Autogenerated travel sentence, FH7:

- He traveled Central and Southwestern Sweden to explore family history from 23 June 2018 to 30 June 2018 (destination in Örebro, Örebro, Närke, Sweden) with Barbara Mackey and Barbara's cousins.
- He traveled the Baltic Sea on a cruise ship from 16 June 2018 to 23 June 2018 (destination in Санкт-Петербург [St. Petersburg], Russia) with Barbara Mackey including an overnight stay at Stockholm, Helsinki, and Talin.

## 4. FAMILY PLACES

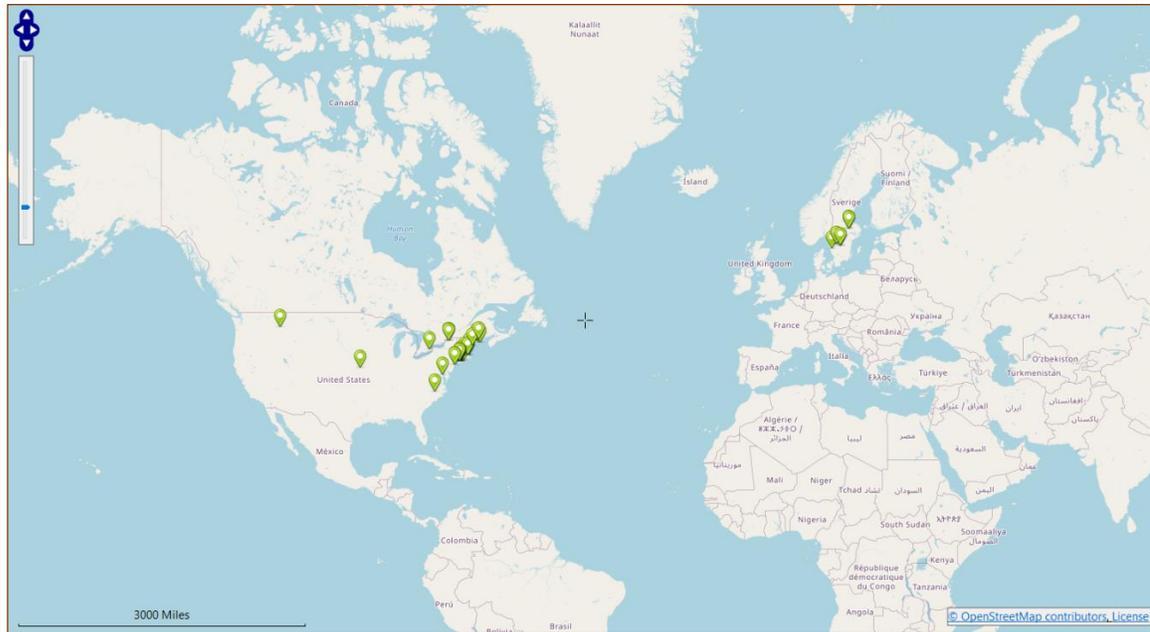


Figure 4-1: Family locations.

My family has ancestral ties to the United States of America (USA), Great Britain (GB), and Sweden (SWE). My research about locations associated with my family has thus far focused on the USA and Sweden, with an emphasis on the latter due to my unfamiliarity with the Swedish language and the country's geography. As I continue to explore my family's past I anticipate following the research trail to places in 18<sup>th</sup>- and 17<sup>th</sup>-century England (GB-ENG) and possibly Wales (GB-WLS), Scotland (GB-SCT), or elsewhere.

### Sweden's Civil and Church Divisions

The kingdom of Sweden has ancient roots, though its precise age is unknown. "Historians usually start the line of Swedish monarchs in the 10<sup>th</sup> century from when Svealand and Götaland were ruled under the same king..."<sup>1</sup> Over time, both internal and external boundaries have changed, particularly during the periods of the Swedes' European empire. Being aware of the territorial changes helps during genealogical research when finding a place or considering the lasting influences of now-neighboring countries. Swedish Lutheran Church records date back to medieval times.

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<sup>1</sup> Wikimedia Foundation, "Sweden" at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Sweden#The\\_Kingdom\\_of\\_Sweden](https://en.wikipedia.org/wiki/Sweden#The_Kingdom_of_Sweden) : page last edited 05 February 2021).

## ‘Lands’ and Provinces

Modern-day Sweden is divided into three regions known as *landsdelar* [lands]: Norrland, which is to the north (and was once included what is now north-western Finland); Svealand which is in central Sweden and has been the administrative center of the Kingdom since the Middle Ages; and Götaland in southern Sweden.

Österland, now Finland, was a fourth *landsdel*. See Figure 4-2.<sup>1</sup> My genealogical focus is Svealand and Götaland.

*Landsdelar* have no administrative function.<sup>2</sup>

Similarly, Sweden’s 25 geographical provinces [*landskap*], which have been around since the 1200s, have served no administrative function since 1634. Historically, the provinces were centers of regional power, under the authority of families of strong military and political power (i.e., dukes and duchesses). These cultural regions retain historical legacies and a means of cultural identification—dialects, foods, and folklore generally follow provincial borders.

### Västergötlands landskap

Västergötlands landskap [province], home of my paternal grandmother’s line, is in southwestern Sweden bounded on the northwest by Sweden’s largest lake, Vänern, and on the northeast border by Sweden’s second largest lake, Vättern. The shoreline of Vänern is 330 kilometers (210 U.S. mi) long, with 130 km (81 U.S. mi) along Vättern.<sup>3</sup>

Göta Älv, Sweden's largest river [*älv*], drains from Vänern to the sea at Göteborg, or Gothenburg (the only Swedish city with an alternate English name). Important cities and towns have been situated along the river for centuries, it being part of the Göta Kanal [Göta canal] which, from Göteborg, “spans the width of Sweden to the Baltic Sea south of



Figure 4-2: ‘Lands’ of Sweden  
(Wikimedia Commons)

<sup>1</sup> Wikimedia Foundation, “File:Sverigekarta-Landsdelar, namn och landskap.svg” at *Wikimedia Commons* ([https://commons.wikimedia.org/wiki/File:Sverigekarta-Landsdelar,\\_namn\\_och\\_landskap.svg](https://commons.wikimedia.org/wiki/File:Sverigekarta-Landsdelar,_namn_och_landskap.svg) : accessed 11 February 2024).

<sup>2</sup> Wikimedia Foundation, “Lands of Sweden” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Lands\\_of\\_Sweden](https://en.wikipedia.org/wiki/Lands_of_Sweden))

<sup>3</sup> Wikimedia Foundation, “Västergötland” at *Wikipedia, The Free Encyclopedia* (<https://en.m.wikipedia.org/wiki/Västergötland> : page last edited 09 March 2019).

Stockholm.”<sup>1</sup> The river’s name translates as ‘River of Geats’ which refers to the Geats, or Goths, who inhabited the region through the Middle Ages.<sup>2</sup> Also known as Västergötaland in Bokmål, one of the two major written standards of Norwegian which means ‘book language’ or the literary form of Norwegian.

### Västmanlands landskap

My paternal grandfather’s family is from Västmanlands landskap, or ‘land of the western men’ province, which is composed of forested, rocky terrain. Sweden’s third largest lake, Mälaren, marks the southwestern border of the province.<sup>3</sup> It drains to the Baltic Sea. The terrain rises from the fertile lowlands around Mälaren, to a hilly, wooded moraine landscape in the north.<sup>4</sup>

The more rugged terrain of the northern portion is known for mining, which began in the 1300s. “Historically significant, there are as many as 20,000 known ancient remains in Västmanland—including graves dating back to the early Iron Age....”<sup>5</sup> From the early 1500s to 1719 the province was divided between Västerås and Strömholm counties. Västmanland county [Västmanlands län] was created in 1634.<sup>6</sup>

## Counties of Sweden

Counties [*län*] are the country’s umbrella jurisdictions, functioning like the states in the USA. County boundaries changed over the years, the most recent being in 1997 when counties were reorganized and renamed throughout Sweden.<sup>7</sup> Two modern-day counties, Västra Götaland (letter code O) and Västmanland (letter code U), are of particular interest in tracing my ancestry. The current 21 counties each have a unique letter code, first used in 1916 and reassigned in 1998. Officially recognized until 1974, they are often used in family history research.

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<sup>1</sup> European Union, “The Göta älv Estuary” at *IMMERSE (Implementing Measures for Sustainable Estuaries)* (<https://northsearegion.eu/immerse/project-estuaries/the-goeta-aelv-estuary/> : accessed 06 November 2023).

<sup>2</sup> Wikimedia Foundation, “Göta älv” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/G%C3%B6ta\\_%C3%A4lv](https://en.wikipedia.org/wiki/G%C3%B6ta_%C3%A4lv) : age was last edited 06 May 2023).

<sup>3</sup> Wikimedia Foundation, “Västmanland” at *Wikipedia, The Free Encyclopedia* (<https://en.wikipedia.org/wiki/V%C3%A4stmanland> : page last edited 25 January 2019).

<sup>4</sup> German-Swedish Chamber of Commerce, “Holiday accommodation in Västmanland – self-catering” at *Trip to Sweden* (<https://www.sweden-holidays.com/sweden/v%C3%A4stmanland/holiday-home-rental-accommodation/search/SE/44> : accessed 06 November 2023).

<sup>5</sup> Visit Sweden (company), “

<sup>6</sup> FamilySearch International, “Västmanland County, Sweden Genealogy” at *Family Search Wiki* ([https://www.familysearch.org/wiki/en/V%C3%A4stmanland\\_County,\\_Sweden\\_Genealogy#History](https://www.familysearch.org/wiki/en/V%C3%A4stmanland_County,_Sweden_Genealogy#History) : page last modified 12 December 2018).

<sup>7</sup> Wikimedia Foundation, “Provinces of Sweden” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Provinces\\_of\\_Sweden](https://en.wikipedia.org/wiki/Provinces_of_Sweden) : page last edited 05 January 2019).

The now unofficial county letters are:<sup>1,2</sup>

- A – Stockholms stad [city] (up to 1968)
- AB – Stockholms län [county] (from about 1969)
- AC – Västerbotten
- B – Stockholms län (except the city before 1968)
- BD - Norrbotten
- C – Uppsala
- D – Södermanland
- E – Östergötland
- F – Jönköping
- G – Kronoberg
- H – Kalmar
- I – Gotland
- K – Blekinge
- L – Kristianstad (from 1997 part of Skåne county)
- M – Malmöhus (from 1997 part of Skåne county)
- N – Halland
- O – Göteborg och Bohus (from 1998 part of Västra Götaland county)
- P – Älvsborg (from 1998 part of Västra Götaland county)
- R – Skaraborg (from 1998 part of Västra Götaland county)
- S – Värmland
- T – Örebro
- U – Västmanland
- W – Kopparberg (from 1997 named Dalarna county)
- X – Gävleborg
- Y – Västernorrland
- Z - Jämtland

I note similarities in the names of the following relevant territorial areas. The first two are within the region that had been occupied by the Geats (western Göta country), and the second pair are within “(The) Land of the Western Men’, where the ‘western men’ (*västermännen*) were the people living west of Uppland, the core province of early Sweden.”<sup>3</sup>

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<sup>1</sup> FamilySearch International, “Swedish County Letters,” at *Family Search Research Wiki*, ([https://www.familysearch.org/en/wiki/Swedish\\_County\\_Letters](https://www.familysearch.org/en/wiki/Swedish_County_Letters) : accessed 18 December 2023).

<sup>2</sup> Hans Högman, “Swedish Counties / Svenska län” at *Hans Högman: History* ([http://www.hhogman.se/swe\\_counties\\_map\\_eng.htm](http://www.hhogman.se/swe_counties_map_eng.htm) : updated 12 June 2019; accessed 10 March 2021).

<sup>3</sup> Wikimedia Foundation, “Västmanland” at *Wikipedia, The Free Encyclopedia* (<https://en.wikipedia.org/wiki/V%C3%A4stmanland> : page last edited 08 October 2023).

- Västergötlands landskap – historical province
- Västra Götalands län – present-day county
- Västmanlands landskap – historical province
- Västmanlands län – county

## Church Jurisdictions

The fundamental Lutheran Church jurisdiction, a *pastorat* [pastorate], defines the geographical scope of a vicar's responsibility. A *pastorat* may be composed of one or several *socknar* [parishes]. *Socken* is a medieval word for 'coming together, congregate.'<sup>1</sup> Each *socken* is made up of one, two, or more *församlingar*, or congregations (multiple *pastorat* make up a *kontrakt*.)

Church records predate civil records, can be incredibly detailed, and are mandatory references for genealogists. The king of Sweden was head of the Church of Sweden and all Swedes were required by law to be church members into the 1800s. Thus, as an extension of the state, clerical surveys are essentially annual censuses dating back to the 1600s. Records might have been kept in one book for the *pastorat*, or sometimes a separate book for each *socken* or *församling*.<sup>2</sup> The Church was the keeper of official population records until 1991.

## Registration Districts and Civil Jurisdictions

Making distinctions between church and civil jurisdictions is confused by the Swedish Lutheran Church being, in some form, the State church until 2000. What were once church boundaries and functions often became civil boundaries and responsibilities. Focusing on a particular time helps in deciding whether to search clerical or civil records for information.

### Härader

Prior to county administrative subdivisions, the sectional administration of the provinces was overseen by *härader*, or hundreds. Velingå, for example, was in Vartofta härad. "The Hundred Court was where people in the countryside settled disputes."<sup>3</sup> All types of civil and criminal cases were heard in the *härader* where ordinary Swedes served as lay judges and as assessors of estates (which indicates generally widespread literacy and understanding of the law in Sweden during the past several centuries).<sup>4</sup> Hundred court records include property transactions and probate. An estate inventory [*bouppteckning*] was conducted for all deceased persons who owned property to ensure that a percentage of their residual estate was paid to

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<sup>1</sup> Per Clemensson and Kjell Andersson, *Your Swedish Roots: A Step by Step Handbook* (Provo, Utah: Ancestry, 2004), p. 32.

<sup>2</sup> FamilySearch International, "Swedish Pastorat," at *Family Search Research Wiki*, ([https://www.familysearch.org/wiki/en/Swedish\\_Pastorat](https://www.familysearch.org/wiki/en/Swedish_Pastorat) : page last modified 26 February 2019).

<sup>3</sup> Caroline Guntur, "Areas & Subdivisions of Sweden," in the enrolled course *Searching Sweden*, at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 05 February 2021). <https://www.coursesbycaroline.com/courses/1171755/lectures/29759146>

<sup>4</sup> Maria Agren, *Domestic Secrets: Women & Property in Sweden, 1600-1857* (Chapel Hill: University of North Carolina Press, 2009), p. 169.

the poor of the parish.<sup>1</sup> An accounting of most everything owned by deceased individuals and listing of heirs make *bouppteckningar* valuable family history sources.

### Fögderi

Counties could be divided into smaller geographic areas for the primary purpose of tax collection and law enforcement. Called *fögderi*, their boundaries often matched the boundaries of the *häradar*.<sup>2</sup>

### Rotar

Registration areas originally delineated for military purposes, *rotar*, were adopted for other types of record keeping. Rural inhabitants were usually entered into parish records according to household within each *rote* (singular), and in rural areas the term could be thought of as a group of farms. The larger population in a city congregation [*stadsförsamling*] made keeping records impractical for the clergy. Therefore, surveys in city parishes were subdivided into *rotar*. A city *rote* might be thought of as a neighborhood or ward.<sup>3</sup> Keeping household examination and moving records fell to the Roteman Institution [*rotemannainstitutionen*] in cities in the late 1800s.<sup>4</sup> In Stockholm, the *rotemannainstitutionen* kept population records in a *mantalsbok* for each large building or city block, from 1878 to 1926.<sup>5</sup> Other authorities also utilized registration districts [*rotar*] for bookkeeping, both in cities and rural areas.

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### Civil jurisdiction resources:

- ▶ The FamilySearch Wiki is a great reference tool for exploring Sweden's historical counties, parishes, and other jurisdictions: [familysearch.org/wiki/](http://familysearch.org/wiki/), e.g., Skaraborg County, Västmanland County.
- ▶ "Swedish Civil Jurisdictions for Family History (1630–1900)," Appendix G

## Skaraborgs / Västra Götalands Län

During the 1970s Sweden conducted a nationwide local government reform, which followed other changes over the centuries in the kingdom's territorial and administrative boundaries. Therefore, it is important to know the names of both current and past counties, parishes, and similar defined areas where records were kept about ancestors.

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<sup>1</sup> Hans Högman, "Genealogy in Sweden (1)." at *Hans Högman: Genealogy* ([http://www.hhogman.se/swe\\_genealogy.htm](http://www.hhogman.se/swe_genealogy.htm) : updated 09 December 2022; accessed 11 September 2023).

<sup>2</sup> FamilySearch International, "Swedish Fögderi," at *Family Search Research Wiki*, ([https://www.familysearch.org/en/wiki/Swedish\\_F%C3%B6gderi](https://www.familysearch.org/en/wiki/Swedish_F%C3%B6gderi): page last modified 10 April 2020).

<sup>3</sup> GFröbergMorris, "Naming Customs: Swedish Genealogy in Cities" at *Swedish Genealogy Guide* (<http://swedishgenealogyguide.com/archives/tag/naming-customs> : 09 May 2014 and 16 March 2015; accessed 20 January 2020).

<sup>4</sup> Caroline Guntur, "Areas & Subdivisions of Sweden," in the enrolled course *Searching Sweden*, at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 05 February 2021).

<sup>5</sup> Fredrik Haeffner, "SweGGate Swedish Population Registration" at *RootsWeb* (<https://sites.rootsweb.com/~swewgw/Fact/Hist/facHisPopul.htm#Mantalsl%C3%A4ngder> : updated 20 May 2005; accessed 24 April 2023).

For instance, the location of Anna V. Lindquist’s 1888 birth at Däliden (a soldier’s croft), Hulegården (a settlement), Hadäng (a district), Velinga (a parish that was at the time annexed to Daretorp parish), Skaraborgs län (a county) would now be considered within Velinga (a hamlet), Tidaholms kommun (a municipality) in Västra Götalands län (county). From the 1600s up until December 1997, Västergötland province was divided into Skaraborg (R) county, Älvsborg (P) county, and a minor part of Gothenburg and Bohus (O) counties. From 01 January 1998, nearly all the province has been considered part of the newly created Västra Götaland (O) county.<sup>1</sup> To research my *farmors familj*—paternal grandmother’s family—I need to be aware that Velinga parish was once part of Skaraborgs (R) county, which is sometimes abbreviated as ‘Skb:l.’

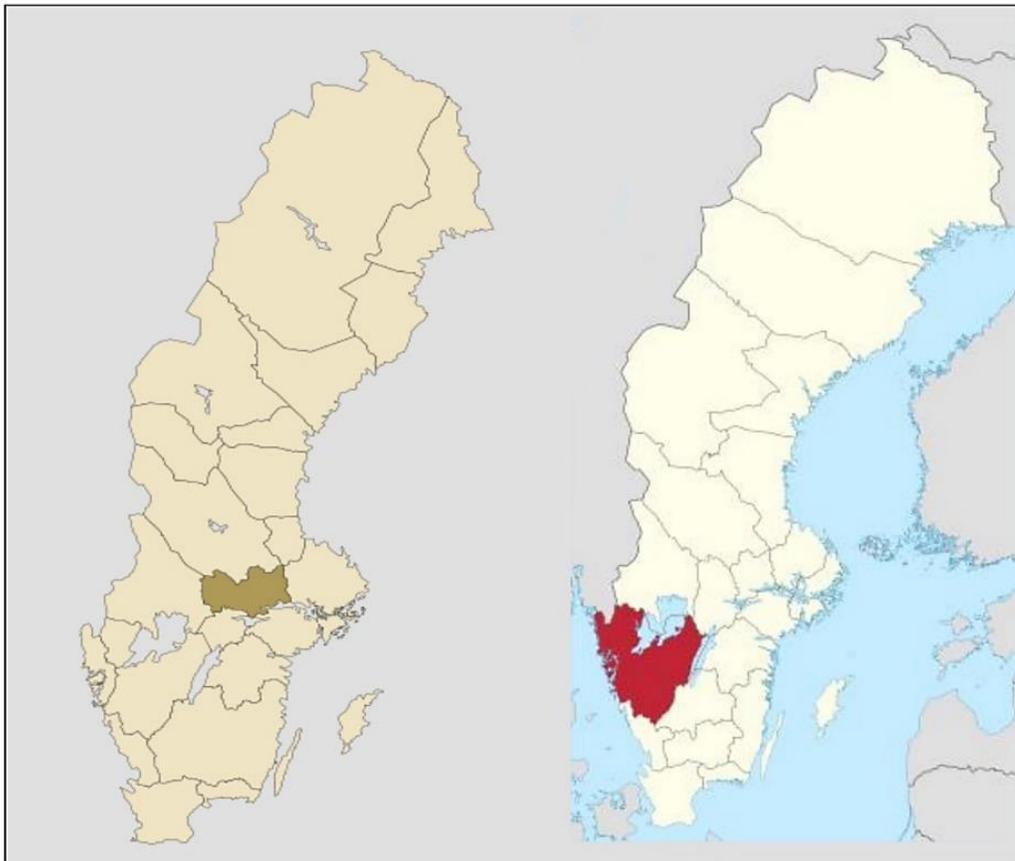


Figure 4-3: Two modern Swedish counties – Västmanlands Län (left); Västra Götalands Län (right).

### Tidaholms Kommun

Urban and rural areas were merged into larger unitary municipalities during the 1970s local government reforms. Tidaholms kommun is a modern-day municipality in Västra

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<sup>1</sup> Wikimedia Foundation, “Provinces of Sweden” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Provinces\\_of\\_Sweden](https://en.wikipedia.org/wiki/Provinces_of_Sweden) : page last edited 05 January 2019).

Götalands län. Its seat is the city of Tidaholm, on the banks of the river Tidan. The city of Tidaholm (c. 1910) was, in 1974, combined with the surrounding rural Hökensås jurisdiction and parts of Dimbo and Fröjered. Twenty former entities, as of 1863, are within the present amalgamated municipality [*kommun*].<sup>1</sup>

*Velinga/Velinge, Daretorp, and Härja Socknar*

My grandmother's ancestors came from four historical parishes [*socknar*] in present-day Tidaholm municipality: Velinga/Velinge, Daretorp, Härja, and Varv/Hvarv.<sup>2</sup> Velinga has medieval origins. Both Daretorp and Härja were *pastorat* [vicarages] at various times, with responsibility for Velingas socken. Velinga and Daretorp were combined in 1962. In 1998, that combined parish joined with the ancient Härja socken to be included in Tidaholms *pastorat*. From 2010, the Tidaholm församling [congregation] has been within Hökensås *pastorat*.<sup>3</sup>

According to a genealogy prepared by \_\_\_\_\_,<sup>4</sup> graves of my ancestors are in the following historical country congregations or parishes [*landsförsamling*] all within modern-day Tidaholm municipality in Västra Götaland (O) county.

- Daretorp
- Falköping
- Fröjered
- Härja
- Kungslena
- Velinga

In 2018, I visited my great-grandparents' grave at Velinga cemetery, and walked in Daretorp and new Härja cemeteries.

The first thing I learned about **Velinga**, is that there are at least four other parishes in Sweden with similar names: Valinge, Vålinge, and Vällinge and Vellinge. Prior to 1940 the parish name was spelled Veling, ending with 'e' rather than 'a'

| Velinga Parish, Skaraborg, Sweden Genealogy |                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Jurisdictions                               |                                                                                                                                                                                                                                                                                                                                                        |
| <b>Stift</b>                                | Skara                                                                                                                                                                                                                                                                                                                                                  |
| <b>Pastorat</b>                             | <p>Velinga has been the annex parish in Daretorp, Velinga and Härja parishes since 1962.</p> <p>Until 1961, Velinga was the annex parish in Daretorp, Velinga and Brandstorp parishes' <i>pastorat</i>.</p> <p>The official name of the parish was formerly Veling. From 1940 onwards, the official name was Velinga after the land register form.</p> |
| <b>Län</b>                                  | Skaraborg                                                                                                                                                                                                                                                                                                                                              |
| <b>Landskap</b>                             | Västergötland                                                                                                                                                                                                                                                                                                                                          |
| <b>Härad</b>                                | Vartofta                                                                                                                                                                                                                                                                                                                                               |
| <b>Tingslag</b>                             | -1912 Dimbo, 1913-1970 Vartofta and Frökind                                                                                                                                                                                                                                                                                                            |
| <b>Domsaga</b>                              | Falköping                                                                                                                                                                                                                                                                                                                                              |
| <b>Fögderi</b>                              | -1946 Vartofta, 1946-1966 Tidaholm                                                                                                                                                                                                                                                                                                                     |
| <b>Kommun</b>                               | 1952-1970 Hökensås<br>Landskommun, 1971-1973 Hökensås, 1974- Tidaholm                                                                                                                                                                                                                                                                                  |
| <b>Militär indelning</b>                    | SKARABORGS REGEMENTE, Kåkind's kompani                                                                                                                                                                                                                                                                                                                 |

Figure 4-4: Velinga jurisdictions. (Wikimedia Commons)

<sup>1</sup> Wikimedia Foundation, "Tidaholm Municipality" at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Tidaholm\\_Municipality](https://en.wikipedia.org/wiki/Tidaholm_Municipality) : page last edited 09 December 2017).

<sup>2</sup> There is also a Varv *socken* in Östergötaland län. The old spelling is Hvarv.

<sup>3</sup> Wikimedia Foundation, "Velinga församling," at *Wikipedia, The Free Encyclopedia* ([https://sv.wikipedia.org/wiki/Velinga\\_f%C3%B6rsamling](https://sv.wikipedia.org/wiki/Velinga_f%C3%B6rsamling), page last edited 09 November 2018), in Swedish.

<sup>4</sup> xxxxx, sent in a letter to Augusta Otilia Lindquist in 19xx

(not be confused with Vellinge Parish).<sup>1</sup> Furthermore, ‘W’ and ‘V’ were interchangeable, so it’s not unusual to see a spelling where either is used, i.e., Welinga or Velinga. There is also a Veling district within Veling/Velinga parish. Figure 4-5 shows relevant jurisdictions associated with Veling/Velinga.<sup>2</sup> For consistency, I have adopted the modern spelling in most instances: Velinga.

Hadängs Rote

One place of interest within **Velinga** parish is the registration district [*rote*] of Hadäng where the Anders Johan Petersson-Lindquist family lived. Hulegården (Hulegård) Hadäng is the settlement where Dälden *soldatbos* (*soldatboställe*), soldier’s croft NO. 846, is located; a *soldatbo* consisted of a cottage and farmland. Anders Johan was the *rotedat*, or soldier [*soldat*] for the district [*rote*]. Each *rote* was supported by two or more farmers who were thereby exempt from conscription as long as they provided and maintained soldiers for the army or sailors for the navy. (Two *mantal*, or enough farm production to support two families, were required per soldier or sailor.)<sup>3</sup> I counted nine *soldater* within Velinga in the late 1800s.<sup>4</sup>

### Västmanlands Län

*Väst-man-land* translates as ‘west-man-land,’ or western country. Västmanland county (letter code U) borders the counties of Södermanland (D), Örebro (T), Gävleborg (X), Dalarna (W), and Uppsala (C). A stretch of shoreline on lake Mälaren (Sweden’s third largest) is within the county.<sup>5</sup>

| Norberg Parish, Västmanland, Sweden Genealogy |                                                                                                                                       |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Jurisdictions                                 |                                                                                                                                       |
| Stift                                         | Västerås                                                                                                                              |
| Pastorat                                      | -1810 Norberg and Västansfors, 1811- Norberg                                                                                          |
| Län                                           | 1634-1640 Västmanland, 1641-1646 Sala, 1647- Västmanland                                                                              |
| Landskap                                      | Västmanland                                                                                                                           |
| Härad                                         | Gamla Norbergs bergslag                                                                                                               |
| Tingslag                                      | -1899 Gamla Norbergs bergslag, 1900-1928 Gamla Norberg and Vagnsbro, 1929-1970 Gamla Norberg                                          |
| Domsaga                                       | -1857 Gamla Norberg, Norrbo, Vagnsbro and Skinnskatteberg, 1858-1928 Västmanlands norra, 1929-1973 Västmanlands mellersta, 1974- Sala |
| Fögderi                                       | 1720-1946 Bergslag, 1947- Fagersta                                                                                                    |
| Kommun                                        | 1863-1951 Norberg, 1952-1970 Norbergs köping, 1971- Norberg                                                                           |
| Militär indelning                             | <b>Västmanlands Regemente:</b> Bergs Kompani<br>Extra Soldat-Roteringen<br><b>Västmanlands Regemente:</b> Bergslags (Bergs) kompani   |
| NAD Ref Code                                  | SE/ULA/11099                                                                                                                          |

Figure 4-5: Norberg jurisdictions (Wikimedia Commons).

<sup>1</sup> “Sveriges församlingar genom tiderna – Velinga 168504” at *Skatteverket* [tax authority] (<https://www.skatteverket.se/privat/folkbokforing/attvarafolkbokford/folkbokforingenshistoria/sverigesforsamlingargenomtiderna/forteckning/v.4.18e1b10334ebe8bc8000822.html> : accessed 15 February 2021).

<sup>2</sup> FamilySearch International, “Velinga Parish, Västmanland, Sweden Genealogy,” at *Family Search Wiki* ([https://www.familysearch.org/wiki/en/Velinga\\_Parish\\_Skaraborg\\_Sweden\\_Genealogy](https://www.familysearch.org/wiki/en/Velinga_Parish_Skaraborg_Sweden_Genealogy) : last modified 18 February 2021; accessed 28 March 2021).

<sup>3</sup> Hans Högman, “The Late Allotment System, ‘Yngre indelningsverket’” at *Hans Högman: Military* (<http://www.hhogman.se/late-allotment-system-1.htm> : accessed 11 July 2022).

<sup>4</sup> (SWE)-Velinga, 1870-1880, church-bk-R-AI-8-ppI-IV (<http://www.arkivdigital.se/aid/show/v26683.b4> : accessed

<sup>5</sup> Wikimedia Foundation, “Västmanland County,” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/V%C3%A4stmanland\\_County](https://en.wikipedia.org/wiki/V%C3%A4stmanland_County) : page last edited 21 January 2019).

An online timeline shows that from 1634 to 1640 the area was known as Västmanlands län, it was Salas län from 1641 to 1646, and again Västmanland from 1647 to the present.<sup>1</sup>

Västerås is the oldest city of Västmanland, founded around 990 (it was also the name of a county from the early 1500s to 1719). In the early 1970s nationwide government reform merged urban and rural areas into unitary municipalities. The present-day *kommuner*, or municipalities, in Västmanland län include Norbergs kommun.<sup>2</sup>

### Norbergs Socken and Stad

My paternal grandfather's line comes from Norberg. Figure 4-6 shows associated jurisdictions for Norberg parish.<sup>3</sup> Norbergs stad, or the town of Norberg, has been the seat of the larger Norberg municipality since 1863. Structures survive in town from the 1300s and 1700s,<sup>4</sup> including Engelsberg Ironworks. The UNESCO World Heritage site

is an outstanding example of an influential European industrial complex of the 17th to 19th centuries. It is the best preserved and most complete example of a Swedish iron-working estate (*järnbruk*) of the type which produced superior grades of iron. This made Sweden an economic leader in this field for two centuries and significantly contributed to the country's prosperity during that period. Important examples of the technological equipment of this era as well as associated administrative and residential buildings are preserved within the property.<sup>5</sup>

Engelbrekt Engelbrektsson was born on a farm outside the town in the 1390s. He is well-known in Sweden as a leader of rebellion against the King in 1434, and I often encountered his name in public places during a 2018 visit to Norberg.



Figure 4-6: Former open-pit mine, Kärngruvan. (© Göran Bergman, 2019)

<sup>1</sup> FamilySearch International, "Norberg Parish, Västmanland, Sweden Genealogy," at *Family Search Wiki* ([https://www.familysearch.org/wiki/en/Norberg\\_Parish,\\_V%C3%A4stmanland,\\_Sweden\\_Genealogy](https://www.familysearch.org/wiki/en/Norberg_Parish,_V%C3%A4stmanland,_Sweden_Genealogy) : page last modified 19 September 2018).

<sup>2</sup> FamilySearch International, "Västmanland Province, Sweden Genealogy," at *Family Search Wiki* ([https://www.familysearch.org/wiki/en/V%C3%A4stmanland\\_Province,\\_Sweden\\_Genealogy](https://www.familysearch.org/wiki/en/V%C3%A4stmanland_Province,_Sweden_Genealogy) : page last modified 04 January 2018).

<sup>3</sup> FamilySearch International, "Norberg Parish, Västmanland, Sweden Genealogy," at *Family Search Wiki* ([https://www.familysearch.org/en/wiki/Norberg\\_Parish,\\_V%C3%A4stmanland,\\_Sweden\\_Genealogy](https://www.familysearch.org/en/wiki/Norberg_Parish,_V%C3%A4stmanland,_Sweden_Genealogy) : page last modified 19 May 2022).

<sup>4</sup> Wikimedia Foundation, "Norberg Municipality," at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Norberg\\_Municipality](https://en.wikipedia.org/wiki/Norberg_Municipality) : page last edited 31 December 2018).

<sup>5</sup> UNESCO World Heritage Convention, "Engelsberg Ironworks" at *World Heritage List* (<https://whc.unesco.org/en/list/556/> : accessed 06 November 2023).

## Norberg Mines

My great-grandfather Jacob Jacobsson worked in the local mines [*gruvoor*] for 47 years, starting at age 18 or 19 and rising to foreman at 21. He was mine foreman at Tremänning, Hackspett, Hedberget, Kolningberget—serving in the latter for 27 consecutive years—and Kärrgruvan.<sup>1</sup> The northern part of Norberg is called Kärrgruvan, where there are many open-pit iron mines such as the one shown in Figure 4–7.<sup>2</sup>

The name Kärrgruvan comes from a small open-pit mine with the same name and can be translated as ‘the marsh mine’ or ‘the swamp mine.’...

There is a mining museum in Kärrgruvan called Norbergs gruvmuseum. Under the museum there is a deep shaft used to bring water out of the mines. A waterwheel a couple of kilometers away from there, called *Polhemshjulet* [The Ferris wheel], ran the pumps with a lever mechanism. Inside the museum visitors can be shown how the process worked. The museum also shows how the earliest method for extracting iron ore worked; to break the mountains by using gunpowder, nitroglycerine and dynamite. Drilling techniques, tools and machines for that are shown in the museum.<sup>3</sup>

The mining museum in Kärrgruvan is at Mossgruveparken, which is a park situated over one of the area’s richest iron ore deposits.<sup>4</sup> Those deposits are, in turn, part of a mining district called Bergslagen, which is “a historically, culturally, and linguistically distinct region of Svealand in central Sweden” that covers part of Västmanland (U), Dalarna (W), and Värmland (S) counties.<sup>5</sup>

## Hackspettbackes and Östanmossas Bygdir

Hackspettbacke and Östanmossa are two rural neighborhoods [*bygdir*<sup>6</sup>] within Norberg’s mining district that are recorded residences for Jacob Jacobsson and family. The Hackspett mine, where Jacob was foreman, was presumably at Hackspettbacke *bygd*. *Hackspett-backe* translates as ‘Woodpecker-hill.’

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<sup>1</sup> “Västmanland, Norberg, A 75-year-old. Homestead owner J. Jakobsson, Östanmossa,” undated clipping, calculated 1917, from unidentified newspaper; privately held by Carl R. Jacobson, [125 Horse Creek Trail], Middlesex, North Carolina. Inherited 1997 from the estate of Dorothy H. Phillips (Jacobson). Translation held by Bruce E. Jacobson [39 Hodgdon], Seal Cove, Maine. (File name: Jacobsson\_19170000\_75-bday-newsclipping.pdf.)

<sup>2</sup> Göran Bergman, “Kärrgruvan” at *Google Maps* ([https://maps.app.goo.gl/pyu5j9rXckbNxyUd8?g\\_st=ic](https://maps.app.goo.gl/pyu5j9rXckbNxyUd8?g_st=ic) : accessed 11 December 2023). Photo dated April 2019.

<sup>3</sup> Wikimedia Foundation, “Kärrgruvan” at *Wikipedia, The Free Encyclopedia* (<https://en.wikipedia.org/wiki/K%C3%A4rrgruvan> : page last edited 08 October 2019, accessed 11 December 2023). English version.

<sup>4</sup> SpottingHistory.com, “Norberg Mining Area: Norberg, Sweden” at *SpottingHistory.com* (<https://www.spottinghistory.com/view/1162/norberg-mining-area/> : accessed 13 December 2023).

<sup>5</sup> Hudson Institute of Mineralogy, “Bergslagen mining district, Sweden” at *minedat.org* (<https://www.mindat.org/loc-122548.html> : accessed 14 December 2023). English version.

<sup>6</sup> ‘Bygd’ is a word of old usage usually applied to a group of houses in the countryside. I have adopted it for use with my historical records, in part, because it has only four letters. (*see*: <https://en.wiktionary.org/wiki/bygd>)

Östanmossa is where Jacob was living on the occasion of his 75<sup>th</sup> birthday.<sup>1</sup> It is also the location of Östanmossgruvan which produced iron ore from 1859 to 1934 and was worked to a depth of 377 feet.<sup>2</sup> I have not uncovered records of his working at that mine.

### Rosendal i Enåkers Socken

Rosendal, another neighborhood recorded as Jacob Jacobsson's residence, is located in Enåkers parish which is near Norberg. The parish lay within Herby municipality from 1887 to 1952 (then in 2020 was designated within the successor Herby municipality). Jurisdiction was transferred from Västmanland (U) to Uppsala (C) county in 2007.<sup>3</sup>

### Karbennings Socken

Karbenning parish was formed in 1686 and its jurisdictional associations have changed several times since. It is a recorded residence for Jacob Jacobsson. The congregation is presently part of the Norberg-Karbenning parish, and within Norberg municipality.<sup>4</sup>

### Norberg mining resources:

- "Engelsberg Ironworks" at *World Heritage*: <https://whc.unesco.org/en/list/556/>
- "Östanmossa mine, Röberg ore field, Norberg, Västmanland County, Sweden" at *minedat.org* (English version). Includes interactive map of historical mines in the district. <https://www.mindat.org/loc-14533.html>

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<sup>1</sup> "Västmanland, Norberg, A 75-year-old. Homestead owner J. Jakobsson, Östanmossa," undated clipping, calculated 1917, from unidentified newspaper; privately held by Carl R. Jacobson, [125 Horse Creek Trail], Middlesex, North Carolina. Inherited 1997 from the estate of Dorothy H. Phillips (Jacobson). Translation held by Bruce E. Jacobson [39 Hodgdon] Seal Cove, Maine. (File name: JakobssonJ\_19170000\_75-bday-clipping.pdf.)

<sup>2</sup> Hudson Institute of Mineralogy, "Östanmossa mine, Röberg ore field, Norberg, Västmanland County, Sweden" at *minedat.org* (<https://www.mindat.org/loc-14533.html> : accessed 14 December 2023). English version.

<sup>3</sup> Wikimedia Foundation, "Heby kommun" at *Wikipedia, The Free Encyclopedia* ([https://sv.wikipedia.org/wiki/Heby\\_kommun](https://sv.wikipedia.org/wiki/Heby_kommun) : accessed 15 December 2023). Translated to English.

<sup>4</sup> Wikimedia Foundation, "Karbennings" at *Wikipedia, The Free Encyclopedia* ([https://sv.wikipedia.org/wiki/Karbennings\\_f%C3%B6rsamling](https://sv.wikipedia.org/wiki/Karbennings_f%C3%B6rsamling) : accessed 13 December 2023).

## United States of America Civil Divisions

Powers not granted to the United States of America by the Constitution are reserved to the states or to the people (10<sup>th</sup> Amendment). So, both federal and state government records are key in genealogy. The states, in turn, delegate some of their powers to county or municipal jurisdictions. National, state, and local sources must all be consulted when researching USA family history. Other governmental sources include those associated with Native Americans and the colonial powers that administered areas of North America prior to the United States: Great Britain, France, The Netherlands, Spain, Sweden, and Russia.

### New England Region

I have strong familial ties to New England which is composed of six northeastern U.S. states: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, and Connecticut. I have lived in three of those. My grandparents settled in Connecticut and Massachusetts, after migrating from Maryland in the case of my mother's family and from Sweden for my father's. The glacial landforms of mountains, lakes, and indented coastline plus the mixed New England-Acadian forest habitats contribute to my sense of New England as home.

Indigenous Algonquian tribes have inhabited what is called New England for roughly 10,000 years. An abbreviated timeline of early European jurisdiction in the area follows.

- 1497 – Giovanni Caboto (John Cabot) lands on North America's eastern shore and claims it for the king of England.
- 1602 – Bartholomew Gosnold sets up a colony with others that lasts 22 days.
- 1604–05 – Pierre Dugua initiates French colonization of North America under authority of the king of France at Saint Croix Island, present-day Maine.
- 1614 – Captain John Smith returns to England with a cargo of fish and furs from what he calls 'New England.'
- 1620 – Pilgrims aboard the *Mayflower* reach the tip of Cape Cod in November, and Plymouth in December to establish a colony.
- 1638–39 – Portsmouth is founded in Rhode Island Colony and Providence Plantations; Hartford, Windsor, and Wethersfield join together to form Connecticut Colony.
- 1690s–1760s – Great Britain and France battle for control of North America.
- 1783 – Great Britain recognizes independence of the United States.

### Counties and Municipalities of Connecticut

County governments were abolished in the state of Connecticut in 1960, however counties are still relevant for students of history and geography. All legal power is now vested in the state and in local governments. Though named differently, the 179 municipal governments all have similar powers and functions. These municipalities include cities, boroughs, towns, and townships. The state capital is Hartford. There are eight historical counties in Connecticut. Fairfield County, specifically the City of Bridgeport where my paternal grandparents [*farföräldrar*] and their twin daughters lived for a time, and New Haven County are relevant to my family's past and Lutheran church records there might be useful.

New Haven County

The county of New Haven is the locus of much of my family history. It is where my parents were born, where they married, and is their final resting place. I was born and raised in the county's town (and then city) of Milford; my brother and I graduated from Milford High School. Both maternal and paternal grandparents lived in New Haven County during my lifetime, and they lie near their children at Beaverdale Memorial Park, which straddles the Hamden and New Haven line—New Haven also being the name of a city where relatives lived. I've visited Beaverdale graves of the following family, all of whom had a role in my upbringing.

- |                                                     |                                                                    |
|-----------------------------------------------------|--------------------------------------------------------------------|
| 1. Carl <u>Albin</u> Jacobsson (Jacobson)           | 8. Carl Edwin Raymond Jacobson                                     |
| 2. Anna Vitalia Lindquist (Jacobson)                | 9. Dorothy Helen Phillips (Jacobson)                               |
| 3. Augusta Otilia "Guttie" Lindquist                | 10. Ira Ridgeway Phillips                                          |
| 4. Gladys Olga Vitalia Jacobson<br>(Jantzer)        | 11. Helen Rickards (Phillips)                                      |
| 5. Lillian Alice Viola Jacobson<br>(Welter) (James) | 12. George Cadmus Phillips                                         |
| 6. Raymond Charles Welter <sup>1</sup>              | 13. Virginia Stevens (Phillips)                                    |
| 7. Howard E. James                                  | 14. Clara Agnes Pratt <sup>2</sup> (Cade) (Bushnell)<br>(Phillips) |
|                                                     | 15. Hazel May Pratt                                                |

**Counties and Local Governments of Maine**

The state of Maine, the 23<sup>rd</sup> state admitted to the Union, was created in 1820 from the District of Maine, then part of the Commonwealth of Massachusetts. Augusta is the capital. Three of Maine's 16 counties are relevant to my family. I have lived in Cumberland, Waldo, and Hancock counties. My brother has been a resident of Waldo County since 1979 and I've owned my home in Hancock County since 1984. These counties were the ancestral homeland of the four Wabanaki Nations, primarily the Penobscot. County governments hold many genealogy records, especially those related to property transactions and probate, and provide essential services for citizens within their jurisdiction. They predate the creation of the state of Maine.

The 483 cities, towns, and plantations in Maine enjoy home rule authority. "Under 'home rule,' municipalities may govern themselves in any way that is not denied them by state or federal law. This authority sets Maine apart from many other states where the authority of municipal government is exactly the reverse." Maine municipalities generally

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<sup>1</sup> Aunt Lil's first husband and cousin Lorraine's father, Ray Welter, died in 1954 when I was 3 years old; I have no memory of him.

<sup>2</sup> The parents of my grandfather's second wife Clara and her sister Hazel are buried there too: Josiah Pratt (d. 02 May 1946) and Sarah J. \_\_\_\_\_ (d. 27 Nov 1950). I have no info about their son George W. Pratt.

govern through town meeting or through a representative town/city council that acts as the legislative body of the community.<sup>1</sup>

There is no municipal government for more than half of the land area of Maine. The state and county governments provide services in this unorganized territory where the Maine Legislature serves as the “local governing body.” The unorganized territory is composed of 429 townships, plus coastal islands not within municipal jurisdiction.<sup>2</sup>

### **Counties and Municipalities of Massachusetts**

The Commonwealth of Massachusetts is divided into 14 counties. The Commonwealth was created in 1691 from two British colonies: Massachusetts Bay Colony (1629) and Plymouth Colony (1620). Its original 1780 constitution continues to govern. The name of the state is derived from one of the area’s Indigenous peoples, the Massachuset.<sup>3</sup>

The state capital is Boston—where I have maintained my official residence since 1989—in Suffolk County. Worcester County was the home, for a while, of my *farföräldrar* [paternal grandparents] and their twin daughters. Civil records are kept at all levels of Massachusetts government: state, county, and municipal. Massachusetts municipalities

are classified as either towns or cities, distinguished by their form of government under state law. Towns have an open town meeting or representative town meeting form of government; cities, on the other hand, use a mayor-council or council-manager form. Based on the form of government, there are 294 towns and 57 cities in Massachusetts. Some municipalities, however, still refer to themselves as ‘towns’ even though they have a city form of government.<sup>4</sup>

#### City of Worcester, Worcester County

Worcester is the name of both a county and a city in Massachusetts. The city was home to the largest concentration of Swedes in New England in the early 20<sup>th</sup> century.<sup>5</sup> Within 30 years of my *farföräldrars* arrival the Swedish population of the city peaked at some 40,000. Many were drawn by the factories established along the banks of the Blackstone River,

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<sup>1</sup> Maine Municipal Association, “Local Government in Maine,” at *Maine Municipal Association* (<https://www.memun.org/Training-Resources/Local-Government> : accessed 02 May 2023).

<sup>2</sup> Maine Revenue Services, “Unorganized Territory,” at *Maine.gov* (<https://www.maine.gov/revenue/taxes/property-tax/unorganized-territory> : accessed 02 May 2023).

<sup>3</sup> FamilySearch International, “Massachusetts Genealogy Guide,” at *Family Search Wiki* ([https://www.familysearch.org/wiki/en/Massachusetts\\_Genealogy\\_Guide](https://www.familysearch.org/wiki/en/Massachusetts_Genealogy_Guide) : page last modified 23 December 2017; accessed 15 February 2021).

<sup>4</sup> Wikimedia Foundation, “List of municipalities in Massachusetts,” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/List\\_of\\_municipalities\\_in\\_Massachusetts](https://en.wikipedia.org/wiki/List_of_municipalities_in_Massachusetts) : accessed 15 February 2021).

<sup>5</sup> Wikimedia Foundation, “Swedish Americans,” at *Wikipedia, The Free Encyclopedia* ([https://en.m.wikipedia.org/wiki/Swedish\\_Americans](https://en.m.wikipedia.org/wiki/Swedish_Americans) : page last edited 18 February 2019; 15 February 2021).

though my grandfather Carl Albin Jacobsson (Jacobson) was managing a photo studio there within four years of his 1902 immigration to America.

For the most part, Swedes of the era assimilated easily into the rhythms of American life, but even so, many immigrants took pains to preserve Swedish traditions and find ways to stay connected to one another.... Swedes in Worcester created new organizations that helped to keep alive the ways of life of Mother Sweden, and even more importantly, to create opportunities for kindred fellowship and a means for Swedes to help one another, especially the newly arrived immigrants.<sup>1</sup>

Several of the early churches, organizations, businesses, benevolent associations, and communities exist today, though a few have changed their names. These include the community around Quinidamine Village, the hospital, and the Swedish cemetery where a few of my extended family are buried. Records at local Lutheran churches and community organizations may hold useful information about my family as there is an active interest in Swedish heritage in Worcester. The 120<sup>th</sup> Annual Scandinavian Midsummer Festival was held 24 June 2023 at the Scandinavian Athletic Club at nearby Shrewsbury, Massachusetts.<sup>2</sup>

### **Delmarva Peninsula**

The Delmarva Peninsula is a large peninsula situated on the Mid-Atlantic coast of the U.S., with Delaware Bay, the Delaware River, and the ocean to the east; Chesapeake Bay to the west. Pennsylvania borders on the north. The state of Delaware occupies most of the peninsula along with portions of Maryland and Virginia. “The term Delmarva is therefore derived from the letters in the name of the three states that share the peninsula: DELaware, MARYland, and VirginiA.”<sup>3</sup>

The peninsula was home to both of my maternal grandparents’ families starting as early as the mid 1700s. My ancestors lived in Delaware and Maryland, including Delmar or ‘The Little Town Too Big for One State.’ The town motto boasts that it straddles the state line of DELaware and MARYland.<sup>4</sup> While growing up I couldn’t make sense of family references to Delmar, Delmarva, Delaware, Maryland—wait, where is our family from?

The Assateague, Choptico, Moteawaughkin, Hatsawap, and Manaskson, among others, are the Indigenous inhabitants of the Atlantic coast of the peninsula. The Chesapeake shore

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<sup>1</sup> Swedish Match U.S. Division, “Next Stop: Worcester, Mass. – A Sesquicentennial of Swedes” at *Umgåes: A Swedish American Gathering Place* (<http://www.umgasmagazine.com/next-stop-worcester-mass-sesquicentennial-swedes/> : accessed 28 February 2019).

<sup>2</sup> The Swedish National Federation of Worcester, *120th Annual Scandinavian Midsummer Festival* (<https://sacmidsummer.com> : accessed 14 May 2023).

<sup>3</sup> Wikimedia Foundation, “Delmar, Delaware,” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Delmar,\\_Delaware](https://en.wikipedia.org/wiki/Delmar,_Delaware) : page was last edited 14 December 2022; accessed 30 April 2023)

<sup>4</sup> Diptarka Ghosh, “Delmarva Peninsula,” at *WorldAtlas* (<https://www.worldatlas.com/peninsulas/delmarva-peninsula.html> : updated 27 April 2021; accessed 30 April 2023).

is the homeland of the Choptank and Nentigo people.<sup>1</sup> An abbreviated timeline of early European jurisdictions of the peninsula follows.

- 1566 – expedition from Spanish Florida reaches the Delmarva Peninsula.
- 1631 – Dutch West India Company establishes settlement named Zwaanendael, which was destroyed after a year.
- 1638 – New Sweden colony established in northern portion.
- 1664 – British occupy New Netherland colony, including reestablished settlement in what is now Delaware.
- 1682 – Duke of York transfers lands that include the peninsula to William Penn.
- 1776 – Delaware declares independence from Pennsylvania.<sup>2</sup>

The 17<sup>th</sup>-century Swedish colony is of particular interest due to my paternal Swedish heritage. New Sweden was established by a consortium of Swedish, Dutch, and German business interests

along the Delaware River with settlements in modern Delaware (e.g., Wilmington), Pennsylvania (e.g., Philadelphia) and New Jersey (e.g., New Stockholm and Swedesboro)... At the time (until 1809) Finland was part of the Kingdom of Sweden, and some of the settlers of Sweden's colonies came from present-day Finland or were Finnish-speaking.<sup>3</sup>

This seaboard area colonized by Swedes and Finns had previously been claimed by the Dutch, and they regained its control after about 20 years under Swedish rule.

## Counties and Municipalities of Delaware

The Pennsylvania counties of New Castle, Kent, and Sussex declared their independence in 1776 and entered the Union as the state of Delaware. The latter two counties have historically been predominantly agricultural and New Castle County has been more industrialized. On 07 December 1787, Delaware became the first state to ratify the Constitution of the United States and promotes itself as ‘The First State.’ The name Delaware comes from Thomas West, 3rd Baron De La Warr, an English nobleman and Virginia's first colonial governor.<sup>4</sup> “There are 57 incorporated municipalities in Delaware. The Delaware General Assembly charter incorporated municipalities.”<sup>5</sup> The capital city is

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<sup>1</sup> Diptarka Ghosh, “Delmarva Peninsula,” at *WorldAtlas* (<https://www.worldatlas.com/peninsulas/delmarva-peninsula.html> : updated 27 April 2021; accessed 30 April 2023).

<sup>2</sup> Diptarka Ghosh, “Delmarva Peninsula,” at *WorldAtlas* (<https://www.worldatlas.com/peninsulas/delmarva-peninsula.html> : updated 27 April 2021; accessed 30 April 2023).

<sup>3</sup> Wikimedia Foundation, “Swedish colonies in the Americas” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Swedish\\_colonies\\_in\\_the\\_Americas/](https://en.wikipedia.org/wiki/Swedish_colonies_in_the_Americas/) : accessed 05 October 2023).

<sup>4</sup> “State of Delaware” at *GENi* (<https://www.geni.com/projects/State-of-Delaware/41596> : accessed 15 February 2021).

<sup>5</sup> State of Delaware, “Incorporated Municipalities,” at *Delaware.gov* (<https://delaware.gov/guides/municipalities/> : accessed 02 May 2023).

Dover and the largest city today is Wilmington. My maternal grandmother, Helen Rickards (1885–1959), and her parents were born in Delaware.

### **Counties and Municipalities of Maryland**

The province and then the colony of Maryland predates the state by almost 150 years. Today, the state's 23 counties perform most local government functions. "Baltimore City, although a municipality, has been considered on a par with county jurisdictions since the adoption of the Maryland Constitution of 1851."<sup>1</sup> All of the other 156 cities, towns, and villages are self-governing, with equal powers under state law. They are subject to county administration.<sup>2</sup> Annapolis, in Anne Arundel county, is the state capital. My maternal grandfather, Ira Ridgeway Phillips (1885–1969), was born at Salisbury, the county seat of Wicomico County. His parents and ancestors were born elsewhere in Maryland and Delaware.

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<sup>1</sup> Maryland State Archives, "Local Government: Counties," at *Maryland Manual On-Line* (<https://msa.maryland.gov/msa/mdmanual/01glance/html/county.html> : accessed 30 April 2023).

<sup>2</sup> Wikimedia Foundation, "List of municipalities in Maryland," at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/List\\_of\\_municipalities\\_in\\_Maryland](https://en.wikipedia.org/wiki/List_of_municipalities_in_Maryland) : page last edited 29 December 2022; accessed 02 May 2023).

## Mapping Family Places

Maps are useful tools for researching and sharing family history. My take on the key role of maps in this regard is well-stated by the State Library of Victoria, Australia. Here's their answer to the question, Why use maps for family history research?

**Maps allow you to pinpoint a place that you can't otherwise find,** particularly a place that has changed names. As borders changed, so did place names, and it is helpful to know all the names by which a place is known—particularly when the name may have been incorrectly scribbled down on an immigration card by someone who had never heard of the location.

**Maps reveal what life was like in your local area or the kinds of lives your ancestors lived.** Historical maps can help you to reconstruct what life was like for your ancestors. For example, a town plan showing features such as houses, businesses, churches and schools can help you to understand the kinds of jobs and educational opportunities that were available to them.

**Topographic maps reveal the natural features of an area,** such as creeks, hills, swamps, forests, or even the kinds of soils or rocks in the region. With a topographic map you can see how difficult it may have been for an ancestor to farm the land, or traverse a mountain or large lake to get to the closest town or even to church or school. In the past these geographical structures served as solid boundaries that seriously affected migrations.

**Maps can help you find other family history resources.** A map can tell you which administrative district covered the area where your ancestors lived. This allows you to check the appropriate district records to further your research.

**Discover the regional centres that may hold records pertaining to your ancestors.** This is particularly true in Europe and the UK where parish registers are important sources of information, and the United States where local archives and courthouses hold many historical records.

**Maps make information from other sources clearer.** If another source, such as a newspaper article or a diary entry, mentions particular locations, a detailed map may allow you to pinpoint the exact whereabouts of your ancestor. Maps make it easier to follow the narratives provided by other sources.

**Maps in atlases provide information about the economic, environmental or social conditions at a particular time.** You can use this information to make deductions about:

- The sorts of lives your ancestors would have led
- Towns they might have frequented
- Jobs they may have held
- What they might have farmed.

Maps can reveal:

- the layout of a particular town or locality at a particular point in time
- clues about what life in a particular place might have been like
- how a place changed over time
- the exact location of the home, workplace or property of a particular individual
- the exact location of places mentioned in other sources
- the location of historical features which no longer exist.<sup>1</sup>

## Family Historian Maps

Family Historian uses OpenStreetMap to graphically display my geocoded PLACE RECORDS in the FH7 Map Window. This tool visually ties family places to individuals and facts. I choose the individuals and associated facts to be shown and manage the geographic scope, layers of color-coded map pins, etc. One example: I can display the birth places or residences of my Swedish grandparents' ancestors and see if there is any historical overlap in the Jacobson and Lindquist families. By using the 'time-slider' I can observe changes over time or focus on a specific period.

The Map Life Facts plugin for FH7 creates an interactive webpage for locations by dropping a location pin on a map using Google Geocoding and Google Mapping Services. (When I enter coordinates in FH7 they automatically transfer to Map Life Facts.) Both the plugin and FH7 also create a list of places that hyperlink to the map pins.

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### Dropping pins on OpenStreetMap, FH7:

- **Map** icon in FH7 toolbar > View Map Window.
  - ◇ New window buttons appear in FH7 toolbar when Map Window opens.
  - ◇ Also use Map dropdown menu at the very top of FH7.
  - ◇ Various other buttons and menu options within the window are useful.
- > Consult *Getting the Most from Family Historian*<sup>6</sup>, pages 155-161.
- > Click on map > Save Map As > JPEG file.

## My Google Places

If I feel a place is particularly significant in telling my family story, then I do more than create a FH7 PLACE RECORD. I create an entry in Google's My Places. My Places is among a suite of tools from Google that support genealogical research. It is a feature of Google Maps, Google Earth Web, and Google Earth Pro. I refer to it as 'My Google Places.'

Before going into the details of My Google Places, I note its use to create an ancestor's migration timeline by the former *Family Tree Magazine* editor Diane Haddad. She created

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<sup>1</sup> Creative Victoria, "Maps for Local and Family History: Why Maps?" at *State Library Victoria* (<https://guides.slv.vic.gov.au/mapsforlocalhistory/why> : accessed 18 December 2023). Creative Victoria is a government body dedicated to supporting, championing, and growing the state's creative industries, spanning arts, culture, screen, and design.

the custom map with corresponding timeline text shown in Figure 4-8 for a family history photo book.<sup>1</sup>

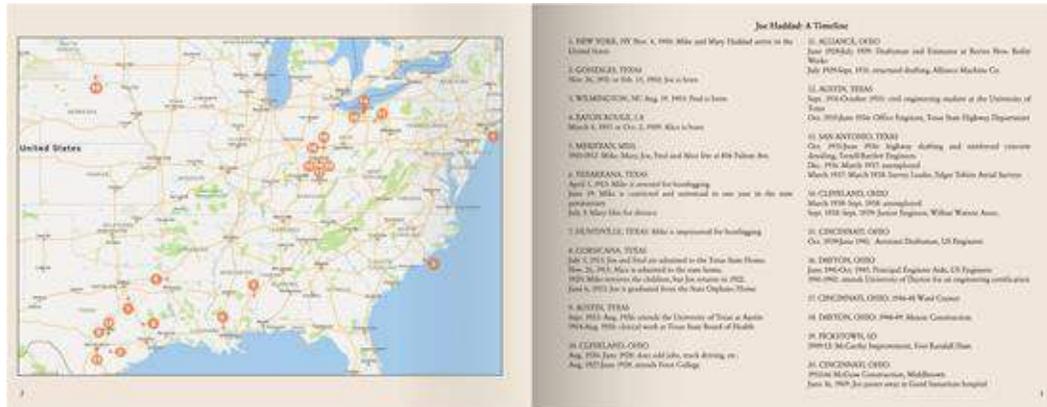


Figure 4-7: Google My Map migration timeline with numbered placemarks. (by Diane Haddad)

Once I have determined coordinates for a family place—see the chapter 3 action: Working with coordinates, Google Earth—I use My Google Places to display those of significance with Google Earth Pro, Google Earth Web, or with my Google Earth iPad app.

My Google Places relies on two file formats to attractively display geographic data: KML (Keyhole Markup Language) and KMZ (Keyhole Markup Language Zipped). “In a nutshell, KML and KMZ are both file formats that are used to display geographic data in Google Earth and other mapping apps. KML is an XML-based file format for storing three-dimensional geographic data, whereas KMZ is a compressed file format that contains one or more KML files as well as their associated resources.”<sup>2</sup> When a ‘placemark’ or pin is created in Google Earth, it is saved in either a KML or KMZ file.

~~~~~  
**Working with My Google Places:**

- **View:** Toolbar or Sidebar > Locate place in Google Earth Pro (Google has stopped supporting Pro).
- > select **Add Placemark** from the **menu** bar and position **Untitled Placemark** at focus place > edit in **New Placemark Dialogue Box**; see Figure 3-8.
- > name placemark with first element of the placename, i.e., the smallest jurisdiction
- > provide any translation of placemark as first line of description, in quotes

<sup>1</sup> Family Tree Editors, “Using Google Maps for Genealogy and Family History” at *Family Tree*, (<https://familytreemagazine.com/websites/google-maps-genealogy/> : accessed 18 December 2023).

<sup>2</sup> Md. Sajid, “Difference Between KML and KMZ” at *Tutorials Point* ([https://www.tutorialspoint.com/difference-between-kml-and-kmz#:~:text=Definition-KML%20is%20a%20file%20format%20for%20storing%20geographic%20data%20in,well%20as%20their%20associated%20resources.&text=It%20is%20an%20XML%2Dbased%20file%20format,compressed%20\(Zip\)%20file%20format.](https://www.tutorialspoint.com/difference-between-kml-and-kmz#:~:text=Definition-KML%20is%20a%20file%20format%20for%20storing%20geographic%20data%20in,well%20as%20their%20associated%20resources.&text=It%20is%20an%20XML%2Dbased%20file%20format,compressed%20(Zip)%20file%20format.) : accessed 19 December 2023).

Table 4-1: Coordinate Precision and My Google Places Properties

DECIMAL PLACES	DECIMAL DEGREES	PLACENAME HIERARCHY ASSIGNMENT	OBJECTS RECOGNIZABLE <sup>1,2</sup>	ICON	TEXT	TILT
0	10.000000	continent, ocean	continent, ocean ≈ 1000 km/620 mi	-	-	-
0	1.0000000	7 <sup>th</sup> – country, kingdom	country ≈ 111 km/69 mi	none	grey (#c4c5c5) x 1.9	60°
0	1.0000000	6 <sup>th</sup> -state, province, region	state, region ≈ 111 km/69 mi	none	CAPS grey x 1.0	60°
1	0.100000	5 <sup>th</sup> - county	large city; administrative district ≈ 11.1 km/6 mi	none	yellow (#ffff00) x 1.0	60°
2	0.010000	4 <sup>th</sup> - town, city, municipality, etc.	city, town ≈ 1.11 km / 62 mi	none	yellow x 1.0	60°
3	0.001000	3 <sup>rd</sup> - village, borough, neighborhood, parish, local district, ward, etc.	neighborhood, village large parcel of land; ≈ 111 m/328 ft	none	CAPS yellow x 1.0	60°
4	0.000100	2 <sup>nd</sup> - road, street, city block	cul-de-sac ≈ 11.1 m / 33 ft	white target x 1.0	white (#ffffff) x 1.0	46°
5	0.000010	1 <sup>st</sup> - farm, house (w/ or w/o street number), cemetery, church, named building, etc.	individual trees, structural details ≈ 1.11 m/3 ft	white target x 1.0; house x 1.2; triangle x 1.2	white x 1.0	46°
6	0.000001	apartment, room, grave	(human) ≈ 11.1 cm/4 in	-	-	-

Blue text indicates association with my placename hierarchy (see Figure 3-7).

- > 1<sup>st</sup> and 2<sup>nd</sup>-place level: default white text, Range = 1000 (default), Tilt = 46°
  - ◇ residence of direct ancestor – ‘homegardenbusiness’ icon (default color) x 1.2
  - ◇ place of interest – white ‘target’ icon x 1.0
  - ◇ church/cemetery of note – white ‘triangle’ icon x 1.2
- > 3<sup>rd</sup> to 7<sup>th</sup> levels: no icon, yellow text, adjust Range as desired, Tilt = 60°
- > 3<sup>rd</sup> and 5<sup>th</sup> levels: ALL CAPS text
- > save (OK) in My Places folder established by Google within Google Earth Pro.
- Copy coordinates from New Placemark Dialogue Box; ignore degree symbols.<sup>3</sup>

<sup>1</sup> Wikimedia Foundation, “Decimal degrees” at *The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Decimal\\_degrees](https://en.wikipedia.org/wiki/Decimal_degrees) : last edited 3 October 2021; accessed 08 November 2021).

<sup>2</sup> StackExchange, “Measuring accuracy of latitude and longitude” at *Geographic Information Systems StackExchange* (<https://gis.stackexchange.com/questions/8650/measuring-accuracy-of-latitude-and-longitude> : accessed 07 February 2023).

<sup>3</sup> Rwlante YouTube Channel, “Extract Coordinates (Lat/Long) from Google Earth” at *GIS & GPS Tips and Techniques, YouTube* (<https://youtu.be/xED5dopViyM> : 2014; accessed 17 October 2021).

### Synchronizing My Google Places on PC with iPad, Google Earth:

- Google Pro: Right-click My Places folder > Save Place As to the My Google Places folder in Family History on Dropbox.
- Google Earth app on iPad: **Projects Menu:** Open > Import KML file.

### Maps and family history resources:

- ▶ “Historical Boundaries of the United States, 1783–1912,” by Lincoln Mullen:  
<https://lincolnmullen.com/projects/us-boundaries/> A great interactive timeline map.
- ▶ *Walking With Your Ancestors: A Genealogist’s Guide to Using Maps and Geography* by Melinda Kashuba (2005).
- ▶ Library of Congress Maps: <https://www.loc.gov/maps/>  
Search Maps or click Collections with Maps to view collections of maps by topic.
- ▶ David Rumsey Map Collection: <https://www.davidrumsey.com/>  
79,000 online maps spanning the 16<sup>th</sup> to 21<sup>st</sup> centuries.
- ▶ Perry-Castañeda Library Map Collection by University of Texas at Austin Libraries:  
<https://maps.lib.utexas.edu/maps/>  
70,000 maps from all over the world – most are copyright free.
- ▶ “Several Million Aerial Photos” by ArkivDigital:  
<https://www.arkivdigital.net/flygbilder>  
The images are taken from the 1950s and forward.



## 5. DOCUMENT MANAGEMENT AND STORAGE

**Document** has traditionally meant text fixed on paper, and that meaning still resonates for many genealogists. “However, document includes all media and formats. Photographs, drawings, sound recordings, and videos, as well as word processing files, spreadsheets, web pages, and database reports, are now generally considered to be documents.”<sup>1</sup> My understanding, which developed in my professional work with the National Park Service, conforms with this broader, contemporary concept of the term.

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**document** – information or data fixed in some media.<sup>2</sup>

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My family history documents hold genealogical information (biographical data), reference information (background and research aids), administrative details, and archival materials. More information about safe handling and storage of physical material can be found in the archival storage subsection of chapter 7.

Some genealogical documents I process are **sources**: they are the physical forms that hold genealogical records (*see* source and record subsection of chapter 1). Many more documents are digital images of genealogical **records**; in other words, discreet biographical information found in a source. A photo of a register entry for a birth is an example of a record; the entire registry is the source. Whether source or record, management and storage are similar.

### Documents As Media

Media is the plural of **medium**, which has several alternative dictionary entries. The following Merriam-Webster definition is one that I find useful for family history: “means of effecting or conveying something.”<sup>3</sup> The plural form is described there as “a mode of artistic expression or communication.” Certainly that resonates with works of the written word, and ‘mixed media’ in art.

For archivists, media “refers to the thing that bears the information, as distinguished from the base. For example, in printing, the ink is the medium and the paper is the base. In videotape, the magnetic material that holds the signal is the media, and the polyester film is

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<sup>1</sup> Richard Pearce-Moses, “A Glossary of Archival and Records Terminology,” online database at *The Society of American Archivists* (<https://dictionary.archivists.org/entry/document.html> : accessed 24 January 2020), search term: “document,” notes.

<sup>2</sup> Richard Pearce-Moses, “A Glossary of Archival and Records Terminology,” online database at *The Society of American Archivists* (<https://www2.archivists.org/glossary> : accessed 24 January 2020), search term: “document,” definition 2.

<sup>3</sup> Merriam-Webster, Inc., “medium” at *Merriam-Webster.com* (<https://www.merriam-webster.com/dictionary/medium> : accessed 20 January 2024).

the base.”<sup>1</sup> I suppose a carved incision is the medium and stone is the base for a headstone. But the Webster definition also calls out digital files because use of the word is common in computing.<sup>2</sup> In the end, “a medium is a way or means of expressing your ideas or of communicating with people.”<sup>3</sup>

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**media** — means of expressing ideas or of communicating with people.

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### Media Type and Format

Both electronic—digital—and non-electronic—hard copy—documents convey genealogical information; each has **media** and **format** characteristics. Three-dimensional objects are also relevant to understanding my family history, especially those I’ve identified as keepsakes (*see* chapter 7). Useful information is, ultimately, expressed by an array of media. I categorize media into one of 11 types that rely on a broad concept of the term, such as the definition above.

Media are inherent in all genealogical documents and all media are set out in some specific arrangement. That is, every medium has a format. One example: “The general physical appearance of a book, magazine, or newspaper, such as the typeface, binding, quality of paper, margins, etc.”<sup>4</sup> is its format, as described in the first definition below.

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**format** – the form, arrangement, presentation, or configuration of something.<sup>5</sup>

**file format** – a standard way that information is encoded for storage in a computer file.<sup>6</sup>

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I employ a more specific usage with digital files. The Internet Assigned Numbers Authority defines media types that tell computer programs “the format of files and their contents so that they can be processed and/or displayed correctly.” They have two

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<sup>1</sup> Richard Pearce-Moses, “A Glossary of Archival and Records Terminology,” online database at *The Society of American Archivists* (<https://dictionary.archivists.org/entry/medium.html> : accessed 19 September 2023), search term: ‘medium,’ Note.

<sup>2</sup> Merriam-Webster, Inc., “medium” at *Merriam-Webster.com* (<https://www.merriam-webster.com/dictionary/medium> : accessed 20 January 2024).

<sup>3</sup> HarperCollins Publishers Limited, “Definition of ‘medium’” at *Collins English Dictionary* (<https://www.collinsdictionary.com/us/dictionary/english/medium> : accessed 20 January 2024)

<sup>4</sup> Dictionary.com, LLC, “Format” at *Dictionary.com* (<https://www.dictionary.com/browse/format> : accessed 30 January 2024).

<sup>5</sup> Kat IP Pty Ltd., “What is another word for format?” at *Word Hippo* (<https://www.wordhippo.com/what-is/another-word-for/format.html> : accessed 23 September 2023).

<sup>6</sup> Wikimedia Foundation, “File format” at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/File\\_format](https://en.wikipedia.org/wiki/File_format) : accessed 28 January 2024).

components: (a) “a category of file format, such as audio, image, text, or video,” and (b) “the format of the file; for example, an image could be a GIF, JPEG, PNG, or WebP”<sup>4</sup>

Table 5-1: Media Types

TAG	TYPE	TYPE DESCRIPTION	FORMAT EXAMPLES
abm	album	photo album, bound scrapbook, yearbook	hard copy, PDF
air	aerial	from aloft: map, survey, aerial photo, satellite image, etc.	hard-copy, TIFF
art	art	painting, drawing, visual arts, and other images not already classified	hard-copy, 3D, TIFF
aud	audial	usually an audio recording but could be information from spoken-word added to a database without supporting media.	MP3, magnetic tape, etc.
cns	census	civil and church (SWE A1, A11, B records) population census and similar source.	PDF
obj	object*	three-dimensional (3D) object used for creating keepsake IDs; technically a base for text, picture, or other format.	3D item
ltr	letter	correspondence, including email and text messages, etc.	hard-copy, PDF
pic	picture	snapshot or portrait: people, places, objects, etc.	print, transparency, negative, JPEG, TIFF, etc.
pub	publication	published book, e-book, news and journal article, blog, webpage, etc.	hard-copy, PDF, etc.
txt	text	all other text-based documents	hard-copy, PDF DOC, etc.
vid	video	moving images in all forms	film, MP4, MOV, etc.

\* technically a base.

In the CatalogIT inventory of family keepsakes, the `category` field holds a hierarchical notation of media type and format for each item.

#### Reporting media, FH7:

- Tools Menu: Check for Unlinked Media
  - ◇ Checks all media files in the media folder that are linked to media records the FH7 project and optionally deletes unlinked files.

<sup>4</sup> “Media Types” at *PHP & MySQL* (<https://phpandmysql.com/extras/media-types/>; accessed 27 January 2024) website by publisher Wiley (<https://www.wiley.com/en-us>) for *PHP & MySQL: Server-side Web Development*; Jon Duckett,

## Document Folders

I store documents in both digital and physical folders. I keep mirror digital folder structures on the hard drive of my computer and in the cloud, with Dropbox. The two sync automatically. When I upload digital documents to Family Historian for citation, I use the same folder structure. Paper and digital folders generally follow the same naming system.

## People Folders

In most cases the first element of organization for patrilineal family history is a family group. I create a digital and paper folder for each pairing, i.e., a legally committed couple or any two people with children. Each family folder includes genealogical information from the time of a couple's marriage, partnership agreement, or other official pairing, plus any relevant notes or related material. Data about individuals is kept with their family group if one is known.



Figure 5-1: Family history sample directory structure.

Folders for traditional families are labelled with the husband's and wife's names used at birth, male first. Initially I used their full names, but found the label length unwieldy. Now I use initials for given names that are not their given name used: Carl E. R. Jacobson + Dorothy H. Phillips for my own family group, for instance. Individuals in same-sex couples are listed alphabetically. Names are preceded by ID numbers (*see* chapter 3: "Write It Down") to keep them grouped by pedigree. Use of ancestral numbering avoids confusion in families that followed patronymic naming practices. As discussed in the Family-Member IDs section of chapter 3, information on individuals that are not in my direct line are also included if they figured prominently in my family's life.

Items that pertain to events prior to pairing, such as birth certificates and family census pages, are kept in the parents' folders. Individuals stay with their original family folder

until they are paired, when a new family household folder is then created. If a person was not paired, their biographical information stays with that of their parents. For instance, my information is in a subfolder within the 01.02-1.3 Carl E. R. Jacobson + 02.02-1.2 Dorothy H. Phillips folder; material up to the time of my brother's first pairing is also there. After his first pairing, a new family household folder holds related material. With digital sources there are true subfolders for offspring; paper folders and subfolders are ordered numerically using family-member IDs. Subfolder labels use an individual's family-member ID and full name.

Paper folders are arranged in the file drawer in two large groups: those labeled on the left tab for my father's ancestors (odd leading numbers) and my mother's on the right (even leading numbers). Color coding further distinguishes my paternal and maternal lineages. Subfolders and folders holding relevant information about other persons of interest are inserted with the appropriate generation, labeled on the middle tab.



Figure 5-2: Paper biographical folder examples.

### Color Coding

The colors for people folders or labels for other physical storage containers—and digital scenarios where color can be added—match the color of the appropriate family line.<sup>1</sup>

- paternal grandfather's lineage: **BLUE**
- paternal grandmother's lineage: **GREEN**
- maternal grandfather's lineage: **RED**
- maternal grandmother's lineage: **YELLOW<sup>2</sup>**
- other family members or associates: **GREY** or **WHITE**

<sup>1</sup> Kimberly Powell, "How to Organize Your Genealogy Files," at *ThoughtCo* by Dotdash Press (<http://thoughtco.com/organizing-your-genealogy-files-1420709> : posted 05 July 2018).

<sup>2</sup> Mary E. Vassel Hill, "Charts," at *The FamilyRoots Organizer Color-Coding System* (<http://www.genrootsorganizer.com/> : accessed 20 January 2019).

Given a patrilineal system, the **02.03-1.1 Ira R. Phillips + 04.03-1.3 Helen Rickards** folder would be red if I were the root generation; the **01.03-1.4 C. Albin Jacobsson + 03.03-1.3 Anna V. Lindquist** folder would be blue. *See* Figure 5-2.

### Creating people folders:

- Create a folder for each legally committed couple or family group (a couple having children) and for individuals.
  - > Label family folders with the male's name at birth (given names followed by surname), joined with a plus (+) to the spouse's name, using initials for more than one given name.
  - > Label folders for individuals with their full name.
  - > Include each individual's ancestral lines ID number before their name (*see* Family-Member IDs).
- Color code folders:
  - ◇ paternal grandfather's lineage: **BLUE** (r22 g234 b246 & 'blue')
  - ◇ paternal grandmother's lineage: **GREEN** (r205 g250 b180 & 'green')
  - ◇ maternal grandfather's lineage: **RED** (r255 g210 b210 & 'light red')
  - ◇ maternal grandmother's lineage: **YELLOW** (r255 g255 b175 & 'dark lemon')
  - ◇ extended family, no direct lineage: **GREY** (r199 g199 b199 & 'grey')
  - ◇ family associates: **WHITE**.

#### Paper

- Arrange in drawer by lineage:
  - ◇ odd ancestral IDs on left tab of third-cut paper folders
  - ◇ even ancestral IDs labeled on right tab
  - ◇ persons of interest on middle tab, inserted at the appropriate generation.

#### Digital

- Apply color using Folder Maker Pro 'color names' above.
  - > right click folder or launch program for multiple folders.
- Assign folder icon as appropriate:
  - > right click folder and select `Properties > Customize > Change Icon >` browse and apply desired icon.

### Administration and Reference Folders

Correspondence related to my research, Family Historian software license, etc. are in the administrative folder. A simple hyphen (-) precedes the digital folder name to provide order in sorted lists. -Administration subfolders have common-sense labels.

Research aids, material providing historical context, and other general background information is in the -Reference folder: a hyphen (-) precedes the digital folder name. Background subfolder names are preceded by 'bkg-'. Subfolders holding documents directly related to an individual or family, but not strictly genealogical, are nonetheless included in their genealogy folder for ease of retrieval. For example, bkg-JacobssonCA is a

subfolder of 01.03-1.4 Carl Albin Jacobsson. As seen below, place folders are treated differently because they can be a mix of background and genealogical information.

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#### Creating **reference** and **administrative** folders:

- No tab or color assignments.
- Label general topics with simple descriptors.
- Include individual or family name for reference subfolders labels that hold non-biographical information specific to them; precede with 'bkg-' (e.g., bkg-Anders Johan Petersson)

### Place Folders

Place folders contain contextual information, usually non-biographical, about an individual, a family group, or generations of a family such as descriptions of their home parish or town and farm or neighborhood. Though, they may also hold census records or other data for a whole district or ward. Places thus have their own filing protocol that distinguishes them from other reference and genealogical documents. Manila paper place folders are labeled on the middle tab, filed by country and then organized by standardized place ID.

I begin folder labels for places with the country abbreviation in parentheses. Though folder names can get long, country is followed by my standardized place IDs, which groups them geographically. The focus (usually, a specific placename) terminates both paper and digital folder labels.

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#### Creating **place** folders:

- Start place folder labels with the country abbreviation in parentheses (USA, SWE, ENG, etc.).
- Insert standardized place ID after the country, copied from FH7 PLACE RECORD.
  - ◊ *See* Standardized Place IDs section of chapter 3.
- Follow with the focus, usually placename of smallest jurisdiction.

Paper

- Label on middle tab;
- Arrange by country.

### Archival Folders

First Originals—one-of-a-kind documents—are kept in safe storage separate from genealogical files. These physical archival folders are acid-free, reinforced third-cut, brown folders, one for each grouping of documents.

A single digital ARCHIVAL folder holds TIFFs-of-record and PDFs-of-record. (JPEG images are in the people or place folders that correspond with their focus.) Most of these TIFFs and PDFs are 1<sup>st</sup> Originals and a few are simply items for which I wish to have a

permanent copy. Keepsake IDs differentiate the 1<sup>st</sup> originals: *see* Family Keepsakes, Inventory.

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### Creating archival folders:

#### Paper

- Use brown, acid-free, buffered, third-cut folders
- Label in pencil, so items can easily be added to a folder
- Folder labels mimic archival filenames: keepsake ID, followed by focus:
  - ◇ left tab – photos (pic)
  - ◇ middle tab – photo albums (abm), and areal images (air)
  - ◇ right tab – letters (ltr), publications (pub), and other text (txt)

#### Digital

- Single digital ARCHIVAL folder holds genealogical files and other files that are simply family keepsakes.

### Examples – Folder:

- 01.01-1.2 Bruce Edwin Jacobson
- 01.02-1.3 Carl E. R. Jacobson + 02.02-1.2. Dorothy H. Phillips
- 01.03-1.4 C. Albin Jacobsson + 03.03-1.3 Anna V. Lindquist
- 0.02 Raymond C. Welter + 01.02-1.2 Lillian A. V. Jacobson
- 0.01 Edward C. Langley + 00.01 Georgia M. Phillips
- 0.01 Kenneth E. Perkins + 00.01 Lorraine M. Welter
- .03 Albinus Hasselgren
- ARCHIVAL
- - Administration
- - Reference
- bkg-JacobssonCA
- (SWE 58.11134, 13.99777) Dälden

### Folder resources:

- ▶ “Color-Coding Fun, Part 2: Customizing Your Folders on a PC” by Caroline Guntur at *Organizing Photos by the Swedish Organizer*:  
<https://www.organizingphotos.net/color-folders-pc/>
- ▶ Reordering paper folders:
  - ◇ Smead, 10410 Super Tab folders (14 pt.), letter size, third cut; blue, green, red, and yellow.
  - ◇ Amazon Basics, File Folders, letter size, 1/3 cut tab (manufactured by Tops Products, Covington, TN); gray.
  - ◇ White folders out of stock.

## Digital Document Workflow

My digital working documents are stored within Family Historian as **media** (FH7 assigns an ID number). All such media can be linked to genealogical data—a major advantage of the FH7 application. I process both text-based (PDFs) and image-based (JPEGs and TIFFs) documents similarly prior to saving them as genealogical (or archival) files. My workflow has four broad steps, which are described in detail in the rest of this section.

- A. Obtain new digital document.
- B. Configure metadata, including keywords.
- C. Save as genealogical and possibly archival file.
- D. Work with digital media.

I keep multiple copies of digital documents for backup security. Folders on my PC and in the cloud on Dropbox may include document files not found in FH7 folders (and certainly not found in my paper folders).

### A. Obtain and Log Digital Document

Once I discover a useful genealogical document, I create a research log entry. My digital documents usually come from internet searches or scans of 1<sup>st</sup> Originals and other documents in-hand. The FireShot browser extension allows me to save webpages with genealogical or reference information as images or PDFs. Otherwise, each web-based application or browser has its own method for downloading, not detailed here. Though, note to self: Do not copy ArkivDigital images in full-screen mode. Most genealogy websites download files as images, which requires my converting text-based documents to PDFs; *see* A.3. below. I scan genealogical documents that I have in-hand; *see* A.4.

#### Scanning Guidelines

I purchased an 8½-by-11-inch flatbed scanner, in 2019, to digitalize genealogical documents and family keepsakes. (My phone camera mounted on a tripod works for larger items.) The scanner comes with EpsonScan software which is suited for my purposes. There is little agreement in the resources I consulted about the 'correct' settings to use when scanning images and documents. Table 5-1 presents my take on DPI (dots per inch) and other settings.<sup>1, 2, 3</sup>

If I plan to enlarge an image after scanning, I increase resolution by the same amount I will increase image size. For example, if the resolution is 300 DPI but the final image size will increase to 200 percent, I would change the resolution setting to 600 DPI. Dots per inch

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<sup>1</sup> Denise May Lavnick, *How to Archive Family Keepsakes: Learn How to Preserve Family Photos, Memorabilia & Genealogy Records* (Cincinnati, Ohio: Family Tree Books, c. 2012), p. 111.

<sup>2</sup> Matt Day, "Scanning Film with Epson, V600" at *YouTube* (<https://youtu.be/2buwklEqmU> : accessed 04 Sep 2019).

<sup>3</sup> Jen's Nilsson, "Epson Flatbed Scanner Tutorial" (Pictureline, 18 Feb 2021 at *You Tube* (<https://youtu.be/2m2TaTAzLho> : accessed 04 Jan 2022).

is directly proportional to the final file size of the scan. To preserve maximum options for future use of photos, I save photos as TIFF files of between 20 and 40 megabytes.

*Table 5-2: Scanning Guidelines*

ITEM	DPI	COLOR	FILE SIZE
letter	300	24-bit color	
photograph	600–800	24-bit color	20–40 MB
album page	600	24-bit color	
publication, text; census	400–600	24-bit color	
aerial image, map	1200?		
tintype, daguerreotype	1200	24-bit color	
color film negative, mounted slide	2400 to 3200	48-bit; transparency	20–40 MB
black & white film negative	2400 to 3200	16-bit grayscale	20–40 MB
working document, web upload	300 for printing, 72 for screen display	24-bit color	

#### A.1. Logging research entries, Airtable:

- Open Genealogy Research Plan & Log database in Airtable using Chrome browser (with Airtable extension installed): **Log Entries** . Complete fields as information is discovered in the document; *see* Table 3:1;
  - > attach newly discovered file to Airtable Research Log entry using ‘found’ filename;
  - > add file with temporary ‘found’ filename to appropriate folder in Dropbox.

#### A.2. Capturing document from webpage, FireShot

- Navigate to webpage with Chrome browser (with FireShot extension installed);
  - ◇ In ArkivDigital: click wrench icon > adjust Image Settings.
  - > click blue S in browser ribbon > Capture Selection
  - > Save as PDF

#### A.3. Creating PDF from image, PDF Exchange:

- Open PDF Exchange Editor:
  - > **File Menu:** Open > Browse > All Files (\*.\*) > Select (double-click) one image in temporary location to create a new PDF page; repeat for each image then
  - > Insert separate pages into one PDF document;
  - > **Home Menu:** Highlight record’s focus w/ Rectangle (orange, 1 pt.);
  - > **Organize Menu:** Add Header and Footer (pre-formatted footer) > Add;
  - > **Convert Menu:** OCR , if document is primarily typeset or other printed format;
  - > double check for weird conversion of text.
  - > **File Menu:** Save PDF with temporary filename in Dropbox and delete images (though retain them in Airtable).

#### A.4. Scanning, Epson v600:

- Consult Appendix E: Epson Scanner Operation for details.<sup>1</sup>
- Remove dust from photos and negatives with an air duster or brush.
- Place negatives 'upside down' in holders provided for film size; emulsion or dull side up, glossy side down (can lay on glass with space at top/back of bed if no holder).
- Always use `Professional Mode` to have most control.
- Always check `Unsharp Mask(level=Medium)`.
- For prints, choose the same size on scanner bed to create matching size files.
- For newspapers, magazines, etc., check `Descreening`.
- `DIGITAL ICE` and other settings can remove scratches, etc., but scan time much longer.
- Click `Folder` to select file location and save files with temporary filename.
- `Preview` and check/adjust settings.
- `Scan`. Double click on images opens them in destination folder.

#### B. Add Metadata

My descriptive filenames help keep track of what's in a digital file (*see* C. Save Document). But even with longer filenames (remember the eight-character limit?) the name can only suggest file content. In the past, writing on the flyleaf of a book, the back of a photo, or the edge of a 35mm slide captured valuable information. Not an option with their digital counterparts.

**Metadata** provides information about other data. Metadata can be embedded in a document and is part of the file structure. The information stays with the file contents. If my digital files become separated from all the useful information about them held in Family Historian, some basics will be available in the embedded metadata. Maintaining metadata, using templates and consistent formats, is just as important as managing and caring for items in my physical collections of keepsakes.<sup>2</sup>

One type of metadata, one that aids searching, is keywords. There are others. For example, the Exchangeable Image File Format (Exif) is a schema developed by a group of photographic manufacturers to embed technical data. Another type, IPTC data, helps tell the story of a document, such as a photo that includes people or a place important in a family's history. Protocols to send photos 'across the wire' were developed by the International Press Telecommunications Council (IPTC) during the 1960s. Since then, IPTC standards have gone through several transitions. In the early 2000s, Adobe created an open standard for embedding metadata into image files called Extensible Metadata Platform (XMP).

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<sup>1</sup> Epson, *Epson Perfection Photo Users Guide* (<https://files.support.epson.com/pdf/prv6ph/prv6phug.pdf> : 2015; accessed 07 Sep 2019), PDF document.

<sup>2</sup> Murtha Baca, ed., *Practical Principles for Metadata Creation and Maintenance in Introduction to Metadata* (Los Angeles, Getty Research Institute, 2016, <http://www.getty.edu/publications/intrometadata/practical-principles/> : accessed 17 February 2021).

Table 5-3: XMP Metadata Elements Utilized

IPTC-CORE	
Creator	Who created the genealogical record?
<i>Job Title</i>	Creator's job title. Creator is prerequisite.
<i>contact info</i>	Address; City; State/Province; Postal Code; Country; Email(s); Website. Creator is prerequisite.
Headline	A brief synopsis of the description. Same as Title.
Description	Narrative description of the content of the file: who is involved, what is their role, what time of day or year, where, why? Sometimes called 'caption.'
Keywords	Hierarchical controlled vocabulary of words important for searching and grouping files.
Date Created	Date the document's content was created rather than the date of the creation of the digital representation.
Title	Brief synopsis of the description. Same as Headline.
Credit Line	Does the creator require credit? If so, copy here.
Source	Details about the entity that owns the document; i.e., repository.
Copyright Notice	Copy from document as appropriate.
Copyright Status	Select: Copyrighted, Public Domain, Unknown.
Rights Usage Terms	Terms of use if known.
IPTC-EXTENSION	
Location Shown & Location Doc Made	These two location elements have the same sub-fields shown below. Complete both if relevant.
<i>Sub-location</i>	Focus of document, <b>see</b> chapter 3. 1 <sup>st</sup> : farm, estate, cemetery, church, named building, named business/etc.; 2 <sup>nd</sup> : lane, road, street, etc. followed by number; 3 <sup>rd</sup> : village, borough, neighborhood, parish, local district/ward/etc.
<i>City</i>	4 <sup>th</sup> : town/city/municipality/regional district/etc.
<i>Province/State</i>	6 <sup>th</sup> : state/province/region.
<i>Country Name</i>	7 <sup>th</sup> : country, rendered in English.
<i>Country ISO Code</i>	Two or three letter code for country where the focus event occurred.
<i>World Region</i>	The name of a location's world region.
Type of Source	<ul style="list-style-type: none"> <li>• Original data captured by a real-life scene,</li> <li>• Digitized from a negative on film,</li> <li>• Digitized from a positive on film,</li> <li>• Digitized from a print on non-transparent medium,</li> <li>• Created by software.</li> </ul>
GPS	
Latitude & Longitude	Unfortunately, Bridge uses an outdated format that requires conversion. <a href="http://kebman.com/misc/gpsConverter.html">http://kebman.com/misc/gpsConverter.html</a>
EXIF	
Dates	Date of original and date digitized.
FILE PROPERTIES	
Preserved Filename	LAST STEP OF MY WORKFLOW IN ADOBE BRIDGE. The legacy filename before I formatted it for genealogical purposes.

I use Adobe Bridge digital asset management software to edit metadata for JPEG, TIFF, PDF, and other genealogical document formats.<sup>1</sup> Bridge enables manipulation of Exif, GPS, IPTC-Core (legacy IPTC was superseded by IPTC-Core) and other types of metadata. I've selected Bridge preferences to customize entering and editing metadata. Table 5-2 shows the fields I use within each of the following types.

- File Properties – characteristics of the file, including the size, creation date, and modification date. I can manipulate only one field: `Preserved Filename`.
- IPTC-Core – editable metadata about the file.
- IPTC-Extension – other information about people, places, and objects that are the focus of the file,<sup>2</sup> including rights-related details.
- Camera Data (Exif) – technical information automatically assigned by a digital camera when the image was taken; mostly not editable.
- GPS – global positioning system (GPS) information. Bridge employs an arcane format for GPS metadata which requires converting all entries for GPS.
- Audio or Video – can be turned on in Bridge preferences as needed.

Not all image software conforms to the standards published by IPTC. Commonly the `Title` and `Headline` fields are confused. Therefore, I put the same text in both fields. Also, some developers label the standard field named 'Description' as 'Caption' (but not Adobe Bridge). Photos may indeed have captions, but they are external to embedded metadata. Generally, the purpose of IPTC metadata is to answer the following questions.

- |                        |   |
|------------------------|---|
| ○ Who is involved?     | ○ How did it happen?                                  |
| ○ What happened?       | ○ Why was it done this way?                           |
| ○ Where did it happen? | ○ What is the source of the information? <sup>3</sup> |
| ○ When did it happen?  |   |

### IPTC 'Creator'

The IPTC user guide describes the `Creator` field as: "Name of the creator of the image. Where the artist cannot or should not be named, the name of a company or organisation may be used."<sup>4</sup> Given that the IPTC standards were developed by and for photographers, this use of the `Creator` field makes sense. However, when dealing with a scan of a historical photo or logbook, who created 'the image'? Was it the 19<sup>th</sup> century photographer or writer, or the person who created the 21<sup>st</sup> century digital copy?

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<sup>1</sup> Other free software I use also allows metadata editing. For example, IrfanView has IPTC and EXIF capabilities but data entry is clunky. Even MSWindows File Explorer has viewing and limited editing capability.

<sup>2</sup> Matt Golowczynski, "What is IPTC metadata? Everything You Need To Know" at *Smartframe* (<https://smartframe.io/blog/what-is-iptc-metadata-everything-you-need-to-know/> : 06 May 2020; accessed 02 May 2021).

<sup>3</sup> IONOS, "IPTC: Easily view and edit image metadata" at *Digital Guide IONOS* (<https://www.ionos.com/digitalguide/websites/web-design/what-is-iptc-data/> : 28 September 2020; accessed 23 April 2021).

<sup>4</sup> IPTC Photo Metadata Working Group, International Press Telecommunications Council, "Photo Metadata User Guide," at *IPTC* (<https://www.iptc.org/std/photometadata/documentation/userguide/> : February 2020; accessed 16 October 2022).

Photographers posit that the 'creator' is the latter. In other words, if I took a digital photo of a genealogical document with my phone camera, I would be the creator of the file rather than the entity responsible for the intellectual/creative content. Is this useful in capturing historical information? Guidance by genealogists on this matter is sparse.

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**creator and record creator** – entity or individual that created a genealogical record in its original form.

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I use the `Creator` field and its sub-fields to document the creator of the genealogical document: the clerk who logged a birth, the artist who painted a portrait, or the photographer who captured a home-town landscape. This practice supplies information more useful to researchers. For instance, online Google image search-results display the `Creator` field to credit a photo. Seeing my name there—as the person who photographed an oil painting of a Swedish landscape owned by my grandparents—has little value compared to seeing that it was painted in August 1934 by Otto Jansson in Kalmars Län. Otto Jansson is the creator of the genealogical document!

The `Creator` metadata field has the same content as the Author/Creator field in my FH7 SOURCE TEMPLATE RECORDS. A document's creator will often not be known to me. If so, I enter 'unknown' in the `Creator` metadata field and leave blank the attendant sub-fields. I had been

### Document File Keywords

IPTC-Core keywords are part of a file's metadata and therefore stay with the image or other document. They are purposeful words or short phrases that point to the meaning or subject of a document and help when searching digital files. The system is not new with computing: Think of a library card catalogue where each card held several keywords. A controlled vocabulary limits the way keywords are entered.

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**keywords** – purposeful words or short phrases embedded in a document's file structure that point to its meaning or subject.

---

I'm building an authority list of keywords in Adobe Bridge. It is a standardized hierarchical vocabulary of words, phrases, terms, names, etc. that conforms with my other naming protocols. Using the authority list provides a consistent way to describe data related to a document and avoids spelling errors and those similar-but-not-quite-the-same entries. Having the authority accessible in the Keywords Panel of Adobe Bridge simplifies data entry; I select from the list presented. As an 'open' list I add new keywords as needed.

I’ve organized my keywords using a hierarchy that I could have created from scratch—indeed I did begin to build my own hierarchical keyword list. But others have already undertaken similar work. Why ‘reinvent the wheel’? Therefore, I used Nomenclature (with which I’m already familiar) as my starting point and then modified it to suit my genealogical purpose.

Table 5-4: Document Keyword Categories

Category*	Description	Examples
[[BUILT ENVIRONMENT]]	objects created to define space for human activities.	building, site feature, bridge, tower, stonewall
[[COMMUNICATION RECORD]]	expressions of human thought, moods, emotions, or ideas such as literature, art, ceremonial objects, or advertising media.	book, painting
[[COMMUNICATION TOOL]]	tools, equipment, and supplies used to enable communication.	pen, violin, camera, artist paint brush
[[DAILY ACTIVITY]]	words describing all activities shown or discussed that are not ‘Life Events’	hiking, cooking, running, quilting
[[DISTRIBUTION or TRANSPORTATION OBJECT]]	created to transport or distribute animate and inanimate things, including containers.	car, train tracks, boat, aircraft, wheelbarrows, bowl
[[FURNISHING]]	objects created to provide for the physical needs of people, generally by offering comfort, convenience, or protection.	bedding, household accessories, lighting,
[[LIFE EVENT]]	life-changing events shown or discussed; the focus of civil and church records.	birth, death, baptism, marriage, death, burial
[[LOCATION]]	names of locations and places that are the focus of the text or depicted in an image; <i>see</i> chapter 3.	Beech Mountain, Acadia National Park, Maine
[[NATURE]]	phenomena of the physical world and its life, excluding humans or substantially human creations.	mountain, thunderstorm, dog, redwood, horse, river
[[ORGANIZATION]]	names of organizations featured.	First Lutheran Church, National Park Service
[[PERSONAL OBJECT]]	created to serve the personal needs of an individual as clothing, adornment, body protection, or an aid in grooming.	dress, hairbrush, hardhat
[[PERSON]]	the focus individuals’ full names, including nicknames and alternate names.	Georgia Mae Phillips (Langley), Carl Ridgway “Rick” Jacobson.
[[RECREATIONAL OBJECT]]	objects used as toys or to carry on the activities of games, sports, gambling, or public entertainment.	basketball, swing, backpack, doll
[[REPOSITORY]]	primarily for searching Jacobson-media type prefixes.	Abm-album, art-visual arts, ltr-correspondence, pic-photo, vid-moving images
[[TOOL or EQUIPMENT]]	created to manage, <i>oversee</i> , capture, harvest, or collect resources or to transform or modify particular materials and includes those for science and technology.	rake, fishing rod, drinking cup, loom, microscope, sextant
Other Keywords	unclassifiable: everything else.	–

\* These category headings are not entered in a document’s keywords.

Nomenclature is a structured and controlled list of object terms used for indexing and cataloging human-made objects, generally organized by functional context. It is the controlled vocabulary most extensively used for historical and ethnological collections in North America. Yet, it has just 10 top-level headings. I consolidated those and added some—such as person, life-changing event, and location—for a total of 15 headings; *See* Table 5-4. An advantage of using Nomenclature is that I can look up more than 15,000 words that are already hierarchically classified.<sup>1</sup> All my keywords are singular to maintain consistency, plus most plural forms of English words will thereby be found in a search.

Clicking a ‘child’ keyword check-box in the Adobe Bridge Keywords Panel enters its keyword ‘parents.’ Top-level headings are for organizational purposes only and are not genuine keywords. I discovered that square brackets around them prevents their selection. `Shift-click` applies just a single keyword, without its parents. (I chose the ‘automatically apply parent’ with ‘shift-click’ option in Preferences.)

MEDIA RECORD Keywords

Family Historian has a `media keyword` field that autogenerates a ‘MEDIA RECORD keyword’ of either Audio, Document, Picture, or Video based on the file format, e.g., pdf, jpeg, etc. There is also a default FH7 setting to import media file keywords, which I disable. Those procedures are not useful to me. I tried pasting the Bridge metadata keywords into the field, but the formatting was all kerflooey and the effort didn’t seem necessary. Instead, I use the `media keyword` field for entering my media types, described in this chapter’s subsection D.

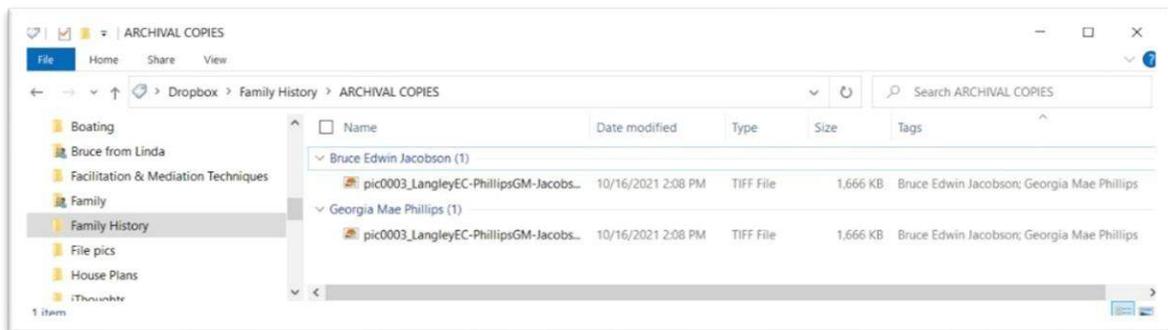


Figure 5-3: File Explorer view grouped by tags (Keywords).

Tags

Microsoft and other programs call keywords, ‘tags.’ Tags are displayed in the Details View of MS Windows File Explorer, sorted by the first keyword affiliated with a file. Tags are searched using the File Explorer Search Tool and can be grouped by tags. Unfortunately, tags

<sup>1</sup> Nomenclature Committee (a collaborative), “User Guide” at *Nomenclature for Museum Cataloging* ([https://www.nomenclature.info/mode\\_d\\_emploi-user\\_guide.app?lang=en](https://www.nomenclature.info/mode_d_emploi-user_guide.app?lang=en) : 2022; accessed 26 October 2022).

for PDF files are not supported in Windows File Explorer. Figure 5-3 shows the search results grouped by tag of a folder that holds a single file that has two keywords.<sup>1</sup> Explorer may also be used for adding tags to some file formats, but I use Adobe Bridge exclusively.

### Document Location

I document the place that is the focus of a genealogical record and where the document was created, if different, using PTC-Extension elements, even though similar info can be included in the IPTC-Core description text and document keywords. My placename hierarchy described in chapter 3, and summarized in Table 5-3 (p. 5.12), is the basis for entering [[LOCATION]] in the IPTC-Extension location elements and keywords. Adobe Bridge employs an arcane format for GPS metadata that requires converting all GPS coordinate entries for Bridge metadata (*see below*: Metadata resources).

### Metadata Templates

I created an Adobe Bridge template called `_Family History`. The template's data may replace existing metadata in the file or be appended to existing data, depending on the **menu** selection I choose. It, and any other template, can be applied to individual files or multiple files. My `_FamilyHistory` template includes the following pre-filled data, though all IPTC elements can be edited if information different from the pre-filled is more accurate. I have also saved copies of `_FamilyHistory` with modified elements for specific batch jobs. My pre-filled template data is as follows.

- o `Creator:Unknown.`
- o `Description: This digital iteration of a historical record was created by Bruce Jacobson of Boston, Massachusetts, USA. Email: results@brucejacobson.com. Website: https://brucejacobson.me/family-history/ . Date: 2023.`
- o `Copyright:Unknown.`

I have another metadata template for original photos taken by me that have genealogical information.

### B.1. Creating new document keywords. Bridge:

- Genealogy Workspace: Keywords Panel – Do one of the following:
  - > New Keyword OR New Sub Keyword button at bottom,
  - > Right-click in keyword list, choose New Keyword OR New Sub Keyword,
  - > **'Hamburger' Menu** (upper right corner) > New Keyword OR New Sub Keyword.
- Follow chapter 3 formatting rules for:
  - ◇ language and translation
  - ◇ locations.

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<sup>1</sup> Caroline Guntur, "Native Organizing, Part 3: Tagging Photos with Keywords in Windows" at *Organizing Photos by The Swedish Organizer* (<https://www.organizingphotos.net/organizing-sorting-tags-keywords-windows/> : 2017; accessed 16 October 2021).

- Follow chapter 3 names of persons protocols , except:
  - ◊ add married name or alternate name in parenthesis after birth name – e.g., Mary Maiden (Married).
- Stick to a single form for verbs: running, playing, jumping (rather than mixing run, play, jumping).<sup>1</sup>
- Use only singular form of nouns, even when more than one object – e.g., ‘shoe’ to indicate a pair of shoes (but pants, scissors, etc.).
- Use lower case, except proper nouns.
- Check that new keyword sits properly as a child in the hierarchy.

### B.2. Assigning document keywords, Bridge:

- Genealogy Workspace: Keywords Panel:
  - > find and highlight file or files in Dropbox folder.;
  - > select the keywords’ check-box or add missing keywords: *see* B.1. above;
  - > select  to embed keywords in file.
- Limit of 10 to 25 relevant keywords.

### B.3. Formatting IPTC metadata, Bridge:

- Adobe Creative Cloud, Bridge, Genealogy Workspace: Metadata Panel:
  - > Find and highlight file or files in Dropbox folder with cursor.
  - > **‘Hamburger’ Menu** in the upper right corner > Do one of the following:
    - > Replace Metadata > `_FamilyHistory` or related template, OR
    - > Append Metadata > `_FamilyHistory` or related template.
  - > complete IPTC–Core fields (*see* Table 5-3).
  - > convert GPS coordinates to Bridge format
  - > complete IPTC-Extension fields (*see* Table 5-3).
  - > Type of Source
  - > GPS: Longitude and Latitude
  - > GPS: Altitude.
  - > select  in lower-right corner of pane to apply changes.

### Viewing metadata keywords:

- Adobe Bridge Genealogy Workspace: Metadata Panel > Select file.
- PDF-XChange: **File menu** > Document Properties
- IrfanView: Open image file >  **Information** icon in Toolbar > IPTC or EXIF.
- MS Windows File Explorer: Details View > Tags column (may need to be added to the view).
  - ◊ Tags are searched using the File Explorer Search Tool.
  - ◊ Additionally, files can be grouped by tags, which is shown in Figure 5-3.
  - ◊ PDFs not supported.

### Metadata resources:

- “GPS Coordinate Converter, Google Maps → Adobe Bridge” by Krister Brandser at *Kebman*: <http://kebman.com/misc/gpsConverter.html>

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<sup>1</sup> Victoria Bampton, “What kind of keywords should I assign to my photos?” at the Lightroom Queen (<https://www.lightroomqueen.com/photo-keyword-ideas/> : 2020; accessed 16 October 2021).

- ▶ “Search Terms” at *Nomenclature for Museum Cataloging*:  
<https://www.nomenclature.info/recherche-search.app?lang=en>
- ▶ “Metadata for Genealogy,” by Caroline Guntur at *Courses by Caroline Guntur*:  
<https://www.coursesbycaroline.com> (video)
- ▶ “Adding Photo Metadata Using Adobe Bridge CC: Part Two—Configuring Bridge and Adding Metadata” by Alison Taylor at *Pictures and Stories*:  
<https://www.picturesandstories.com/news/2017/2/13/using-adobe-bridge-cc-to-enter-photo-metadata> (video)
- ▶ “List of ISO 3166 country codes” at *Wikipedia*:  
[https://en.wikipedia.org/wiki/List\\_of\\_ISO\\_3166\\_country\\_codes#UNI2](https://en.wikipedia.org/wiki/List_of_ISO_3166_country_codes#UNI2)
- ▶ “Photo Metadata User Guide” by Photo Metadata Working Group at *IPTC*:  
<https://www.iptc.org/std/photometadata/documentation/userguide/>

### C. Save Document

Once metadata has been added to a digital file it is time to save it in Adobe Bridge as a genealogical document. I assign a new filename using the Batch Rename function in Bridge—applied to files singly, one-at-a-time—following the file format and naming protocols described below.

#### Digital File Format

I save text-based documents as PDF/A (Permanent Document Format/Archival) files, which not only differentiates them from images (such as air photos and maps) but offers the possibility to read typed text with OCR (optical character recognition). PDF/A is a format that embeds images and fonts used in a document within the PDF file for forward compatibility. PDF/A format allows for storing

archive documents in an internationally recognized format. It’s considered software-agnostic because it can be displayed regardless of the type of software used. In essence, a PDF/A file stores all its relevant data within the file itself, making it secure, easy to access, and searchable for long periods.<sup>1</sup>

It is best to save MS Word documents as standard PDFs and then use my PDF-XChange Editor app to convert them to the PDF/A format. (Make sure the Word file has all font subsets included: `File > Options > Save > Embed Fonts only.`)

Photographic documents and other visual images are saved as JPEG (Joint Photographic Experts Group) or TIFF (Tagged Image File Format) files. FH7 also accommodates videos, audio recordings, and most any other document format; these other digital files keep their native extensions. JPEGs can be ‘saved as’ PDFs using an Adobe Acrobat online converter. PDF/A files are smaller than TIFFs.

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<sup>1</sup> Alp Tetikel, “What is the PDF/A format, and how to use the PDF/A format for your Digital Archive” at *DocShifter* (<https://www.docshifter.com/blog/what-is-pdf-a-how-to-use-pdf-a-for-digital-archive/> : access 21 November 2023).

The TIFF format is preferred for images-of-record (particularly 1<sup>st</sup> Originals) because it is the most stable format. JPEG image quality degrades each time a file is opened and saved. JPEGs are smaller files suited for viewing on the internet or for consulting during research. I may have both a TIFF and a JPEG copy of an image, one for preservation stored in the ARCHIVAL folder and the other a working copy in a family group folder or uploaded to Family Historian. The filenames of copies are the same, with the addition of a media type prefix, or keepsake ID in the ARCHIVAL folder (*see* below). Though TIFF images are usually quite large, they can be safely reduced in size using a lossless process.

Family Historian saves charts as vector files, which are fundamentally different from TIFFs and JPEGs. *See* Sharing with Family Historian section, chapter 8.

### Genealogical Document Filenames

I am fundamentally interested in persons and, to a lesser extent, places. Because the focus of my research is patrilineal family history, genealogical information stored in digital files is most useful when associated with family groups or, in some cases, individuals. This has implications for file naming, organization, and retrieval.

My filenames are in U.S. English and lowercased unless proper nouns. They start with the name of a person or place, followed by the date represented as eight digits (YYYYMMDD), and end with a descriptor. Words within each of these three elements are joined with hyphens (-) and the elements are joined by underscores (focus\_yyyymmdd\_multi-word-descriptor).

Surname is followed by given-name initials in caps for individuals (e.g., JacobsonBE); two partners are joined with a plus sign (' + '). For a location, the locale or smallest jurisdiction that is meaningful is the focus preceded by the country abbreviation in parentheses and a hyphen, e.g., (SWE)-Dälden. Each descriptive filename suggests the who, what, when, and where of the file contents.

Blank spaces are not used in my filenames; hyphens and underscores separate words. Filename character length should be about 35 characters and not exceed the 255-character limit set by Microsoft for the entire string from drive letter (e.g., c:) to file extension. Leading zeros facilitate sorting in numerical order: 001, 002, ...010, 011 ... 100, 101, etc. instead of 1, 2, ...10, 11, ...etc. I avoid the following characters in both file and digital folder names because they may be used in operating systems to perform specific tasks.

~	tilde	*	asterisk	>	right angle bracket
`	back tick	=	equal sign	'	single quotes
!	exclamation point	{	left curly bracket	"	double quotes
@	at sign	}	right curly bracket	:	colon
#	pound		vertical bar (pipe)	,	comma
\$	dollar sign	\	back slash	..	consecutive periods
%	percent	/	forward slash	?	question mark
&	ampersand	<	left angle bracket		

## Census Data

Census documents are treated differently. The first element of the filenames for federal, state, church, colonial, Indian, and school surveys is the 'cns-' prefix followed by the year(s) of the population survey. This indicates the 'what-' and the 'when\_' of the record. Next comes the 'where\_' and then the 'who\_' represented by the head of household, whom I flag with a plus sign (' + '), or an individual noted as living separately from the family. Other useful info follows the final underscore.

Some Swedish church records, which have had uniform record codes assigned since the late 1800s, are census equivalents. I treat the 'A' and some 'B' clerical records shown below as census records for file naming, using 'cns-yyyy' as the beginning. (*See Appendix G for other types of Swedish church records.*)

### *AI – husförhörslängder*

These are the household examination records. By law the parish priest had to meet with everyone in his parish once a year. The purpose of these visits was to assess their gospel knowledge, and note when they last took communion. During the visit he would record their names, place of residence, their age or birth information, and moving information, along with other notes.<sup>1</sup>

### *AII – församlingsböcker*

In compliance with the Royal ordinance of Aug. 6, 1894 the Husförhörslängd was replaced with a new record called a församlingsbok (congregation book or parish book). Like the husförhör, this book was used to register all the people who resided in a parish, but without the religious emphasis. At this time the notation of when a person took communion and how well they did on the catechal examination was removed.... The församlingsbok continued to be used right up to July 1, 1991 when the population registration was turned over to the tax authorities. Theoretically, this record covers 100% of the population.<sup>2</sup>

### *B – inflyttningslängdr och utflyttningslängder*

These are the parish moving in and out records. By law everyone had to be recorded in a home parish. When you moved to another place, you had to report where you were [sic] going to. After getting to the new location, you were supposed to notify the priest of your arrival.<sup>3</sup>

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<sup>1</sup> FamilySearch International, "Sweden Church Records, 1308 – 1940 Images Published on FamilySearch," at *Research Wiki* ([https://www.familysearch.org/en/wiki/Sweden\\_Church\\_Records,\\_1308\\_%E2%80%93\\_1940\\_Images\\_Published\\_on\\_FamilySearch](https://www.familysearch.org/en/wiki/Sweden_Church_Records,_1308_%E2%80%93_1940_Images_Published_on_FamilySearch) : page last modified 12 December 2022; accessed 11 January 2024)

<sup>2</sup> FamilySearch International, "Sweden Church Records," at *Research Wiki* ([https://www.familysearch.org/en/wiki/Sweden\\_Church\\_Records](https://www.familysearch.org/en/wiki/Sweden_Church_Records) : page last modified 18 December 2023; accessed 11 January 2024)

<sup>3</sup> FamilySearch International, "Sweden Church Records, 1308 – 1940 Images Published on FamilySearch," at *Research Wiki* ([https://www.familysearch.org/en/wiki/Sweden\\_Church\\_Records,\\_1308\\_%E2%80%93\\_1940\\_Images\\_Published\\_on\\_FamilySearch](https://www.familysearch.org/en/wiki/Sweden_Church_Records,_1308_%E2%80%93_1940_Images_Published_on_FamilySearch) : page last modified 12 December 2022; accessed 11 January 2024)

The purpose of keeping the moving in and out records was primarily based on taxation. Authorities needed to know where each individual lived to assess and collect the taxes.<sup>1</sup>

Families often were in one place for a long time, and entries for a whole district or ward might provide information about relatives living near to each other. However, by ‘splitting’ civil census and Swedish clerical sources I’m able to create entries for parts of parish books or census schedule for each separate family group.

### Archival Filenames

All my archival filenames begin with the three-letter prefix that shows the media type. For one-of-a-kind documents (1<sup>st</sup> Originals) the media type prefix is followed by a four-digit number; together they form the keepsake ID. *See* Table 7-1 and its accompanying Keepsake ID discussion (p. 7.7). As with other digital files, the name then continues with the focus (person or place), the year, and a descriptor all separated by underscores.

#### C.1. Naming digital **genealogical** files:

- Render filenames in lowercase U.S. English (except proper nouns) in this order:
  1. **focus** of the genealogical record such as ‘who’ (individual/family), ‘where’ (location/place), etc.
    - If place is the focus, begin with the ISO country abbreviation in parentheses.
  2. **date** – YYYYMMDD; no date – 00000000.
  3. any relevant **descriptor** for the focus, the ‘what.’
- Add ancestral lines numbering for digital folder labels, but not filenames.
- Render census files in lowercase U.S. English, except for proper nouns, in the following order separated by underscores ( \_ ):
  1. **cns-YYYY\_**, the ‘what’ and ‘when,’
  2. **place**, the ‘where,’
  3. **head of household** or **focus individual**, the ‘who,’
  4. other **relevant info**, such as date of the survey (e.g., 05July), etc.

#### C.2. Naming digital **archival** files:

1. **keepsake ID**\_ if 1<sup>st</sup> Original or **media type prefix** (e.g., txt\_) for other archival documents.
2. **focus**\_ such as an individual, family, location, etc.,
3. **date**\_ – YYYYMMDD; date unknown – 00000000,
4. any relevant **descriptor** for the focus.

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<sup>1</sup> FamilySearch International, “Swedish Moving In and Out Records” at *Research Wiki* ([https://www.familysearch.org/en/wiki/Swedish\\_Moving\\_In\\_and\\_Out\\_Records\\_\(Inflyttnings\\_och\\_Utflyttningsl%C3%A4ngder\)](https://www.familysearch.org/en/wiki/Swedish_Moving_In_and_Out_Records_(Inflyttnings_och_Utflyttningsl%C3%A4ngder))) : page last modified 18 December 2023; accessed 11 January 2024)

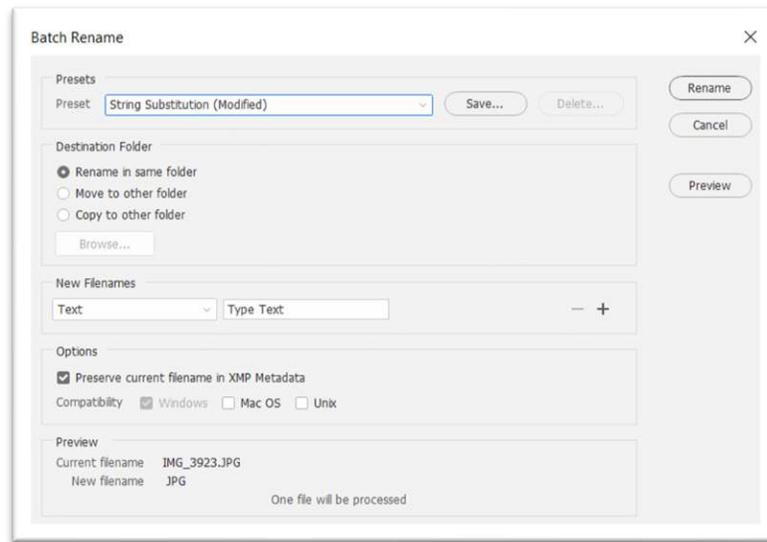


Figure 5-4: Adobe Bridge Batch Rename dialog.

### Examples – Digital genealogical and archival file:

- (SWE)-Däliden\_20110000\_farm-map.jpeg – genealogical.
- (USA)-Milford\_19390000\_history-book-p39.pdf
- PeterssonAJ+SundbergAC\_aft-19190000\_headstone.pdf – genealogical.
- pic\_JacobsonLAV-JacobsonGOV\_00000000\_carriage-portrait.tiff – archival image-of-record.
- pic0001\_JacobsonCER+PhillipsDH\_19451024\_wedding-party.tiff – 1<sup>st</sup> Original archival.
- abm0100\_JacobsonLAV\_19830000\_remembrances.pdf – archival PDF-of-record.
- pic0001.1\_WoodmontRd\_19560200\_house-demo021-MilfordCT.tif – archival image series.
- txt0003\_JacobsonBE\_19510705\_CT-birth-cert.pdf
- cns-1940\_NewHaven\_JacobsonCA+\_federal-04April.pdf – civil census.
- cns-1787-1862\_Velinga\_PeterssonAJ+\_parish-register.pdf [*krykobok*] – clerical census.
- cns-1865-1870\_Härja\_AndersonJP+\_household-exam-bk.pdf [*husförhörslängd*]

### C.3. Saving genealogical or archival files, Bridge:

- Highlight file in Genealogy Workspace: **Tools Menu**: Batch Rename ;
  - > Preserve current filename > Type Text > Rename;
  - > Follow C.1 or C.2.
- For genealogical records: replace file in appropriate Dropbox Family History folder.
- For archival records:
  - > Export To with preset `_Archival` as TIFF.
  - > Export To with preset `_Thumbnails` as PNG, after appending `'_THUMBNAIL'` to filename.
  - > To edit preset: **Window** > Export.
  - > Save in ARCHIVAL folder.

### File resources:

- Convert PDF to JPG at *Adobe Acrobat*:  
<https://www.adobe.com/acrobat/online/pdf-to-jpg.html>

## D. Work with Digital Media

In Family Historian, all digital document files (jpeg, pdf, mp4, etc.) are stored as ‘media.’ Digital documents are added to FH7 either individually or through multiple selection. Family Historian offers several ways to incorporate files into MEDIA RECORDS, including drag-and-drop, with two starting points. I can either start with a particular record or begin with the media item. I find the method described in step D.1 the most direct. I use digital filenames for `Media Titles` when the files are uploaded to FH7.

### Media Tags

I enter media types into a FH7 `Keywords` field in the **Media Tab** of the Records Window that I have labeled Media Type. By default, Family Historian autogenerates either Audio, Document, Picture, or Video for this field based on the file format, e.g., PDF, JPG, etc. Instead, I assign one of the media tags representing a media type described in Table 5-1. (I turned off the default ‘Copy Image Tag Values to the Media Record’ and ‘Autogenerate Keywords’ FH7 settings.) I employ ‘object (obj)’ as a type even though, considering the description of media above, an ‘object’ may more likely be referred to as a ‘base.’ I find object (obj) useful in my Catalogit archives inventory and when using media tags to document keepsake IDs in FH7.

### Media Links

Documents can be linked to an individual, family, place, or source through a FH7 ‘simple link’ once digital files have been uploaded to FH7 (*see* chapter 6 for more about SOURCE RECORDS and Citations). For instance, I might link a person to a picture because they are shown or because they were the photographer. In addition to simple links, Family Historian offers a way to ‘frame’ and then link to parts of images, such as individuals’ faces in photos.

Linking is straightforward and accomplished in the **Links Tab** of the media Property Box. However, both simple and face links are best accomplished in the **Media Tab** of the Records Window, as described in *Getting the Most from Family Historian*<sup>6</sup>, pages 57-59. Media may also be linked from within AncestralSources by following the `Add/View Images...` link.

The official guide to Family Historian describes the advantages of linking to faces using a sample photo of several people, including an individual named Ian Munro. The guide’s author asks, How can Ian Munro be clearly indicated?

One bad solution to this problem is to use an image-editing tool to ‘crop’ the picture, to only show Ian Munro. This is a bad solution because in cropping the picture, you are losing what is best about it. The best and most interesting pictures are ones that show groups of people—especially family members—in interesting, and evocative contexts. Often..., the picture may even say something about family relationships and dynamics. You won’t get any of that if you crop out each person!

In practice, we have found that even if you have a picture with only one person in it, it is still a good idea to link the person to their face. The reason is that for many purposes—in diagram boxes, in individual-related sections in reports and books, and in similar contexts within websites and elsewhere—a tight close-up on a face is exactly what you want. But even when it's just one person, you still don't want to lose the rest of the picture. If you have a picture of a man wearing a military uniform, say, you want both the close-up of his face, but also the whole picture shot of him in his uniform.<sup>1</sup>

The official guide goes on to say that any portion of a photo can be selected and linked within Family Historian using the same procedure as for a face.

The source(s) for a MEDIA RECORD, or a face frame within a photo, can be individually cited in Family Historian. In both cases the citation is added to the **link**, as shown in the Figure 6-4, which is a FHUG forum screenshot.<sup>2</sup> (See chapter 5 subsection, media links, for details.)

### External File Links

When I add documents to FH7 I choose a location in Family Historian project folders that mimic my Dropbox file structure. While these media files are part of FH7 they are external to the GEDCOM file. The Work With External File Links dialog shows all 'external file links' in a project. The dialog cannot be used to move or rename files; it only manages links (stored file names) to external files. Options include the ability to simultaneously update the `File` field in any number of selected MEDIA RECORDS. See Figure 5-6.

#### D.1. Adding media, FH7:

- **Add Menu:** Pictures or **Add Menu:** Other Media;
  - > **Dropbox** : find file in appropriate folder > Select file > Open .
  - ◇ choose to see All Files ( \*.\* ) for other media.
  - > Add Media to Project Window: `Location` button and choose or create appropriate folder (same folder name as on Dropbox) > Add .
  - > Media title field populates with filename: keep filename as media title.
  - > enter year only in Date field;
  - > enter/select `Media Type` ; see Table 6.2;
  - > add relevant Note;
  - > finally, **Add Menu:** OK.

#### D.2. Viewing media, FH7:

Selected RECORDS

- Select one or more FH7 RECORDS,
  - > View Media icon in toolbar:
  - > select option from dropdown menu ('X' = previously selected RECORDS):

<sup>1</sup> Simon Orde, *Getting the Most from Family Historian*6 (London: Calico Pie Limited, 2016) pp. 43-44.

<sup>2</sup> Mike Tate [tatewise], "Citing selected headshots within a photo" at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?t=22644> : posted 13 January 2024; accessed 17 January 2024).

- ◇ View all media,
- ◇ View media of X,
- ◇ View media linked to X.
- > view results in Display Pane.

## Media List

- **View Media** icon in toolbar opens Media List in Media Window,
  - > select option from Media List or Find dropdown menus  
(I don't use MEDIA RECORD Keywords)
  - > view results in Display Pane.

## D.3. Linking media:

See Chapter 5 in *Getting the Most from Family Historian6* (pp. 57-59).

## Link an Individual to Their Face

- Open individual's Property Box Media tab > select image > Edit Media Item dialog.
  - ◇ **Link to Face** button – draw rectangle with crosshairs, etc.
  - ◇ **Select Frame** button – edit or delete.

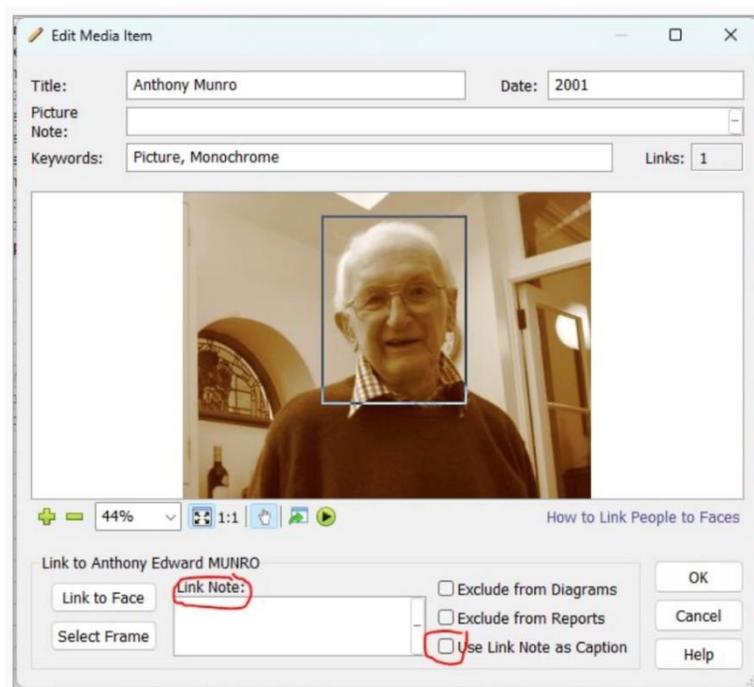


Figure 5-5: Linking to media frame.

## D.4. Fixing broken media links:

See "Fix Broken Links" in *Getting the Most from Family Historian6* (p. 53).

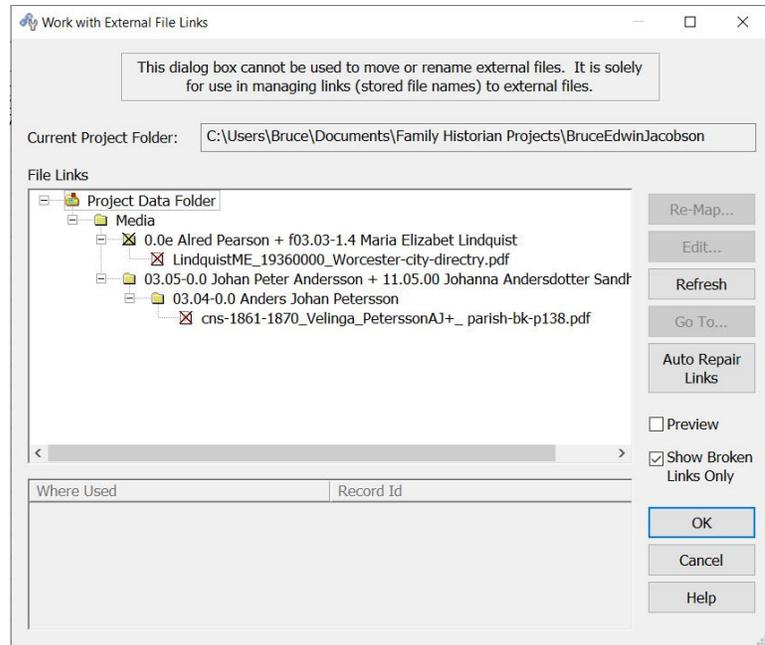


Figure 5-6: Work With Broken Links Dialogue.

#### D.5. Reporting media:

- **Media Menu:** Camera dropdown menu: Media List.
- **View Menu:** All Media.



## 6. FACT, SOURCE, CITATION, AND NOTE IN FAMILY HISTORIAN

Records consist of genealogical information, as described in chapter 1. This chapter considers RECORDS as described by Family Historian: “imaginary storage boxes” that hold data about an individual, a family, or a source. There are 12 different RECORD types in FH7, 3 of which are of no immediate concern to me (SUBMITTER, SUBMISSION, and HEADER). The other nine are:

- INDIVIDUAL RECORDS – hold facts about each person such as name, birth, and death.
- FAMILY RECORDS – hold parent child relationships and family facts such as marriage.
- SOURCE RECORDS – hold source document details cited by the facts
- SOURCE TEMPLATE RECORDS – hold fields specific to the type of source.
- REPOSITORY RECORDS – hold details of source document repositories.
- NOTE RECORDS – hold general notes shared by multiple RECORDS.
- MEDIA RECORDS – hold details of external media files such as photos and documents.
- PLACE RECORDS – hold placename details such as latitude and longitude.
- RESEARCH NOTE RECORDS – link to my Airtable research log.

Most of the database RECORD types are discussed in this chapter 6. *See* other chapters for details about MEDIA, PLACE, and RESEARCH NOTE RECORDS.

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### Finding where FH7 RECORDS are used:

There are several ways to find where FH7 RECORDS are used, though not a single, simple method.<sup>1</sup>

- **View menu:** Record Links...
  - ◇ Only lists the host RECORDS where the chosen RECORD is used and not the specific field(s). So must search further and can only do so in one host RECORD at a time.
- **View menu:** Citations to Source Record...
  - ◇ Only lists CITATIONS linked to a SOURCE RECORD so does not list other links to sources.
- **Tools menu:** Work with Data > Places... dialogue
  - > Where Used...
    - ◇ Only works for PLACE RECORDS but does list every field where the place is used.
- **Tools menu:** Where Used Record Links > Select RECORD Type > OK.
  - ◇ Lists all fields where the chosen RECORD(S) are used but needs to be updated whenever new features are added to Family Historian.
- Fact Witness dialogue Go To > Local Event for Principal/Witness.
- Media Property Box > **Links** tab

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<sup>1</sup> Mike Tate [tatewise], “Better way to find where records are used” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=43&t=22561> : posted 14 Dec 2023; accessed 27 Dec 2023).

## FH7 Facts

Family Historian uses facts to document the things that happened to, or describe, each individual ancestor. They are shorthand for genealogical information, classified in FH7 as: individual, family, timeline, or witness facts. The latter two are not used as often as individual and family facts. All facts are either events or attributes. Broadly speaking, **events** are things that happened to an individual, such as birth, marriage, death, burial, or being enumerated in a census and **attributes** are things that describe them, such as physical features, occupation, or religion. Another way to think about them: “attributes describe ongoing states and events describes changes to ongoing states.”<sup>1</sup>

Facts are entered for individuals in several areas of Family Historian, and in Ancestral Sources. The list of FH7 events and attributes is much too long to recite here (I’ve also added custom facts), so the following list of facts is only a sample.

adoption	civil action	location
alternate name	death	marriage
birth	degree	migration
burial	divorce	military service
christening	immigration	occupation

I can search, sort, and retrieve my family information by any individual, family group, fact, source category, etc. These characteristics serve as research aids: If I wish to find the sources or genealogical records associated with a particular type of information, death for example, FH7 generates a report.

When considering which fact to select for an individual I am mindful of the following.

- **Baptism vs. Christening** – “The GEDCOM standard supports both baptism and christening and so does Family Historian.... Christening is the giving of a name and being admitted to the Christian Church. It is often done by baptism, which is the religious rite of immersing or sprinkling with water.”<sup>2</sup> Christening is usually the appropriate term in my family.
- **Burial vs. Memorial** – I consider a headstone to be a memorial to an individual because sometimes the named person is not actually buried there. Hence, it is not a burial fact. Consider, for instance, a fisherman or sailor who was lost at sea. I created a custom `Memorial` fact to record information from headstones and other memorials erected to individuals.
- **Education vs. Graduation** – I choose `education` rather than `graduation` unless only graduation date is known; `degree` could be used in addition to either.
- **Occupation vs. Employment** – I prefer `occupation` rather than `employment` for distinct periods of work within an occupation because GEDCOM does not

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<sup>1</sup> Adrian Bruce [AdrianBruce], “Re: Emigration Fact - Copying and Using Both Copies” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=21346> : accessed 29 March 2023).

<sup>2</sup> “Baptism or Christening” at *Family Historian User Group – Knowledge Base* (<https://www.fhug.org.uk/kb/kb-article/baptism-or-christening/> : accessed 01 April 2024).

recognize ‘employment.’ The GEDCOM standard defines an occupation as: “The kind of activity that an individual does for a job, profession, or principal activity.”

## Civil and Church Record Facts

I use the Ancestral Sources utility to document civil and church data for an individual’s **birth, baptism, marriage** or civil union, **death**, and **burial** (*see* vital records discussion in chapter 1: “Introduction”). Ancestral Sources is integrated with Family Historian so that each can access the same file when both apps are open, with saved changes in one shown in the other upon reload. The application is especially useful for recording facts for multiple individuals found in a single **census** entry using the `_Census` (civil/church) source template. Info about the source itself is best finalized in FH7 once a minimal SOURCE RECORD is created in AS.

### Entering civil and church facts, AS:

*Note:* A draft templated SOURCE RECORD is created when entering facts using AncestralSources.

- FH7 **Tools Menu:** Ancestral Sources Data Entry.
  - > choose a data entry mode > edit templated source...
  - > select source template from dropdown;
  - > complete fact-related fields.
  - ◇ for census facts:
    - complete grid in census template.
    - create plain-text transcription: `Auto` > `_Civil & Church Facts` > Copy and paste into note.
    - transcribe into note any info for individuals that is not included in grid.
    - create rich-text transcription: `Auto` > `_grid` .
  - > `Save File` > Proceed to FH7, complete source, and add media.

## Anecdotal Facts

At times I find biographical information that is not a match for one of the ‘standard’ facts offered in Family Historian. If I think finding such information will be a common occurrence, I create a correlated custom fact. For odd bits of info about events in the life of an individual or family that will likely not be repeated, I created a custom anecdote fact. For instance, mention in a 1906 newspaper article that my grandfather played the flute in a Worcester, Massachusetts, church orchestra is an ‘anecdote.’

I enter the `date` and `place` of the event, if known. Then, I compose a phrase in the fact note, to be displayed in individual or family reports. NO CLOSING PERIOD is included so that the date and place fields continue as part of the sentence. The sentence expression for reports is: `{note} {date} {place}`.<sup>1</sup>

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<sup>1</sup> “Recording General Events in Individuals Timeline” at *Family Historian/family-historian@groups.io* (<https://groups.io/g/family-historian/topic/104897831> : posted 28 March 2024; accessed 29 March 2024).

## Preferred Facts

A fact can be displayed in preference to other facts of the same type by setting a Preferred Fact Flag (right click on the fact or click the  icon at the bottom of the window). Otherwise, the first birth and death facts will be used to calculate life span, for instance. I “might also want to mark one of a person’s occupations as preferred, if he or she had other occupations, but it is this one that they are best known for.”<sup>1</sup> A Preferred Full Name field is shown for all individuals in the **Names Tab** of their Property Box.

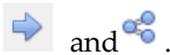
## Witness Facts and Associated Persons

A **witness fact** allows multiple INDIVIDUAL RECORDS, or just names, to be linked to a fact. Family Historian introduced witness facts because there were often more people than just the principal(s) involved with an event (or attribute). Some examples:

- marriage of individuals – witnessed by bridesmaid, best man, witnesses who signed the register, and minister who carried out the ceremony
- grant of probate by individual who made the will – witnessed by executors and beneficiaries.
- birth of individual – witnessed by parents or midwife.<sup>2</sup>

Witness facts are also used to verify a parent-child relationship when there is a specific record citation that claims such a relationship. Entering the FH7 witness roles of ‘mother’ and ‘father’ for birth and baptism events identifies those relationships, rather than indicating the parents were present at an event.<sup>3</sup> This is a bit odd, but that’s how Family Historian set it up: *See* parent-child citation section, below.

Once entered, a witness fact links in both directions, that is, it automatically enters in both the principal’s and witnesses’ RECORDS. While useful, witness facts are not within the GEDCOM standard. Once linked, the following two icons appear in the FH7 Property Box Facts Tab:



and .

The **associated person** feature complies with GEDCOM specifications. Yet it is not well supported in genealogical software, including Family Historian where reports and diagrams or charts do not display such associations. Unlike witnesses, associated person links must be added separately for all individuals. The associated person link is one-way. Therefore, I installed the Property Box Tabs: Associated Persons download (produced by [tatewise]) so

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<sup>1</sup> Calico Pie Limited, “Property Box: Facts Tab, Fact Tab” at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/> : accessed 19 November 2021).

<sup>2</sup> “Witness Facts” at *Family Historian User Group – Knowledge Base* (<https://www.fhug.org.uk/kb/kb-article/witness-facts/> : updated 23 February 2024; accessed 01 March 2024).

<sup>3</sup> Mike Tate [tatewise], “Recording the sources for a relationship” at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=77&t=21838> : posted 08 May 2023; accessed 17 May 2023).

that associations can be easily edited in the individuals' Property Boxes. Associated persons are particularly useful when working with Ancestral Sources.<sup>1</sup>

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#### Entering witnesses, FH7:

- Individual Property Box: Double click on a fact > Enter data.

#### Entering associated persons, FH7:

- Individual Property Box: **Assoc Tab**: > Enter data.

### Timeline Facts

When viewing the **Facts Tab** of an Individuals Property Box it may be most useful to only see the key facts. The Show Timeline Facts icon in the toolbar beneath the facts list toggles the display of all or only timeline facts. In the toolbar, click the Wheel Menu icon to select the timeline facts to be shown for an individual or family.

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#### Converting to a new fact type, FH7:

- **Tools Menu**: Change Specific Fact Tag
  - ◇ Converts an INDIVIDUAL or FAMILY RECORD fact to a new fact type.

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<sup>1</sup> Mike Tate [tatewise], "Re: Associated Person feature" at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?p=78715#p78715> : accessed 01 March 2024).

## FH7 Source Records

Documents with any of the media types described in chapter 5 might be sources of genealogical information. Family Historian v7 promotes the ability to enter a source's data when a document is encountered, rather than create facts and then add sources and record citations as was the usual case in FH6. This data-driven approach is a logical workflow that matches the way I work. Templates make it easier to 'write it down' in consistent, structured ways when I encounter sources. (In addition to the source templates described here, I also use text templates and sentence templates; consult the software documentation for more.)

Once a **SOURCE RECORD** is created in FH7, the genealogical information it contains—FH7 **facts**—is documented with FH7 **citations**. A citation is the link that binds a piece of genealogical information to other data in Family Historian.

If a source exists only in one place, then documenting its physical location as a repository is essential. However, a repository is not documented for any source that is widely available. Occasionally I enter **REPOSITORY RECORDS** so I can return to where I first found a source, even when they are widely available. Repository entries in FH7 are straightforward.

I can display all **SOURCE RECORDS** in a FH7 list, showing details about each. I have configured the list as specified in Table 6-1. Viewing **SOURCE RECORDS** in a property box, the displayed fields I chose are shown in Table 6-2.

*Table 6-1: My Records Window Sources List Specifications*

My Heading	Reference/Function
Short Title ("Source Records")	%SOUR.ABBR%
Links	=LinksTo()
Media	=MediaCount()
Template	%SOUR._SRCT>%
FH ID	=RecordId()
_Source Category ID	%SOUR.REFN[2]%
_Media Type	%SOUR.REFN[1]%
_Keepsake/Media	%SOUR.REFN[1].TYPE%
Author/Creator	%SOUR.AUTH%
_Creator Type	%SOUR._TYPE%
Title	%SOUR.TITL%
_Pub Info	%SOUR.PUBL% <sup>1</sup>
Updated	=LastUpdated()
_Edit Titles	SOUR.CHAN.NOTE2[1].SOUR2[1]

<sup>1</sup> GEDCOM/FH7 defines %SOUR.PUBL% as, when and where a source is published or created.

## Lump or Split?

I had to decide how I would enter sources in Family Historian and AncestralSources when setting up the software. Using a census schedule as an example, would I lump all records in that census year under a single source or create a separate source for each family or page in the schedule? Advice in the software help-files and the Family Historian Users Group favored splitting: most of the detail is recorded in the source and does not have to be entered in separate citations. I'm primarily a 'splitter' (Method 1 in AncestralSources). It is common to find both methods used in FH7 projects and, occasionally, I do 'lump.' Such is the case with authored publications and my personal knowledge.

*Table 6-2: Source Record Property Box Specifications*

Item Name	BJ Label	Data Reference
Main (Template) Tab		
Short Title	(paste filename)	%SOUR.ABBR%
Gen Sour Type & _Custom ID	1 <sup>st</sup> orig orig deriv auth	%SOUR.REFN[2]%
ditto	Creator Type	%SOUR._TYPE%
Custom ID & ID type	abm air art aud obj ltr pic pub txt vid	%SOUR.REFN[1]%
ditto	Keepsake or Media	%SOUR.REFN[1].TYPE%
Author:	Individual Creator:	%SOUR.AUTH%
Publisher	Publisher	%SOUR.PUBL%
Repository	Repository:	%SOUR.REPO%
Repository Name	n/a	%SOUR.REPO>NAME%
Repository City	n/a	%SOUR.REPO>ADDR.CITY%
Repository State	n/a	%SOUR.REPO>ADDR.STAE%
Text from Source	Text from Source:	%SOUR.TEXT%
Template	TEMPLATE	%SOUR._SRCT%
Edit Title Tab		
Short Title	(paste filename)	%SOUR.ABBR%
Title	Title:	%SOUR.TITL%
Main (Generic) Tab		
Short Title	(paste filename)	%SOUR.ABBR%

## Templates and Expressions

The building blocks of templates are expressions, which are used to extract, act upon, or compare data values. They are composed of field codes, data references, functions, or angle-bracket expressions. Expressions have two technical components: data references (e.g., %INDI.BIRT%) and functions (e.g., =RecordID() always with an equal sign) and they involve operators such as: + - \* / = < > and or, etc. Expressions are discussed in this chapter in regards to two types of templates: 'source autotext templates' and 'source

templates.’ Expressions are also used to build queries, define content or style of diagram boxes, define data items in reports, customize columns in named lists, and more.

### Angle-bracket Expressions

Angle-bracket expressions remove field codes from output sentences if the value is empty. They can be used in place of field codes, can be unlimited in number, and can be nested one within another. Plain text may be added within the angles before or after field codes. One common use of angle-bracket expression is for inserting alternative text in the output if a field or expression is blank.

Within an angle-bracket expression, a vertical bar after the main part, indicates alternative text, to be output if the main part is blank. For example, this expression

```
<{code1} | EMPTY! >
```

... would put out the value of {code1} if not blank, but would put out the text 'EMPTY!' if {code1} was blank. The value after the vertical bar does not have to be plain text. Like the main part, it can be any kind of mixture of text and expressions (field codes or angle-bracket expressions). So, for example, if you want the value of {code2} to be output if the value of {code1} is blank, you could use this:

```
<{code1} | {code2} >
```

Each angle bracket expression can have multiple vertical bars—as many as you like. The 2<sup>nd</sup> part—i.e. the part after the first vertical bar—is only output if the 1<sup>st</sup> part (the part before the first vertical bar) is blank. The 3<sup>rd</sup> part (the part after the 2<sup>nd</sup> vertical bar) is only output if the 2<sup>nd</sup> part is blank. And so on. So, for example, consider the following expression:

```
<{code1} | {code2} | {code3} >
```

In this case, {code2} is only output if {code1} is blank, and {code3} is only output if both {code1} and {code 2} are blank.<sup>1</sup>

### Viewing data references with Query Window, FH7:

- Open the Query Window at top of **Query dropdown menu**: select a query which selects type of record to view data references (e.g., Individual Record), All Facts, etc.
  - > **Columns Tab** > black triangle at bottom of Fields list
  - > **Dropdown Menu** > Show Data Reference in Box
  - > click any field in Fields list, appropriate data reference will be displayed.

### Expression resources, FH7:

- ▶ “Understanding Data References” at *Family Historian Help*: <https://www.family-historian.co.uk/help/fh7/understandingdatareferences.html>

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<sup>1</sup> Calico Pie Limited, “Source Template Formats” at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html> : accessed 25 January 2024).

- ▶ “Understanding Expressions” at Family Historian User Group: <https://fhug.org.uk/kb/kb-article/understanding-expressions/>

Source Autotext Templates, Ancestral Sources

Autotext templates try to produce a transcription of the genealogical record in a source document automatically. An autotext template can be a combination of text, keyword tags, and functions. When the `Auto` button is clicked on the Ancestral Sources main entry screen, a suitable autotext template can be selected and the various keywords and functions applied. The generated text will undoubtedly need editing before the entry is saved.

So called ‘standard’ templates are supplied for each of the following record types: census, birth, baptism, marriage, and burial autotext templates. However, they were crafted for use with U.K. records. The rich-text transcriptions of these templates are tables which are not compatible with FH7 reports and with other genealogical programs. Therefore, I generate a plain-text transcription that I paste into a note and also generate a rich-text grid transcription, which is easier to work with in FH7. The AncestralSources developer guided me in creating multiple autotext templates for Swedish church records because the column layout of the clerical surveys differs over time and between parishes.<sup>1</sup> I created a MASTER that I copy and modify to create autotext templates for various household and congregation surveys. I treat the AS-created SOURCE RECORDS as ‘bare bones’ versions that will be finalized in Family Historian.

~~~~~

**Copying, creating, and editing autotext templates, AS:**

- ▶ **AcestralSources Tools Menu:** Census Template... (Editor) .

Method A.

- ▶ Select existing census template Type, Region, and Year range > Copy > New  
**Note:** For clerical surveys first add any new columns to MASTER template.
  - > start a new template by entering Type, Region, and Year (the range of years to which this template applies) > Paste .
  - > edit fields and columns as needed > Save .

Method B.

- ▶ Start a new template by typing Type, Region, and Year range (‘description’ not used) > Complete fields > New > Save .

---

<sup>1</sup> Nick Walker [Nickwalker], “Invalid Date Field” topic 21987 at *Family Historian User Group - Forum* (<https://fhug.org.uk/forum/viewtopic.php?f=34&t=21987> : accessed 01 June 2023)

## Source Templates

Source templates are similar to templates used in generating sentences for FH7 narrative reports and for AncestralSources autotext. However, the expressions used in source templates are more flexible and powerful and should not be confused. “They are separate and distinct.”<sup>1</sup>

Source templates are made up of expressions and text (anything that is not an expression). Expressions in a SOURCE TEMPLATE RECORD generate (a) source record titles, (b) bibliography entries/source list entries, (c) footnotes/full references, and (d) footnotes/short-form citations. “Every field defined as part of a source template definition, has a name and a code.” Field codes within each format are replaced with the actual field values in the linked SOURCE RECORD. The added data then becomes a part of the SOURCE RECORD and can be edited in FH7 independent of the template.<sup>2</sup>

All source entries in FH6 were generic with a limited number of entry fields and a reliance on the title for key information. So, I did my best to follow Mills’ *Evidence Explained* while conforming to the FH6 structure. Family Historian added **source templates** in FH7 which allows me to capture information in a set of fields better matched to the specific source I’m recording, and offers the ability to style text with italics, underline, bold, and caps (except for the RECORD Title ). Source templates can have as many fields as desired for specific groups of genealogical sources or records.

The Advanced Collection of source templates provided in Family Historian v7 is modeled on *Evidence Explained*. Those templates use the details entered to automatically generate all three of Mill’s documentation formats. I edited templates from the Advanced Collection to create a few custom templates. Using them worked well. However, Mills suggests “more than 1,000 citation models”<sup>3</sup> to capture genealogical sources. After some months passed I attempted to create templates for diverse types of sources following models in *Evidence Explained* and I couldn’t remember how to use all the master components I had created.

Next I cloned templates from the Advanced Collection for the sources I commonly encounter, and changed only the FH7 data fields to hold the most critical information for identifying a source used by GEDCOM, such as Title and Author/Creator . (I took this approach because the other data generated by a FH7 source template will likely not be transferable to different genealogy apps; the generic data conform with GEDCOM specifications and probably are transferable to other genealogy software; *See* top part of Figure 6-2.)

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<sup>1</sup> Calico Pie Limited, “Source Template Formats” at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html> : accessed 25 January 2024).

<sup>2</sup> Calico Pie Limited, “Source Template Formats” at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html> : accessed 25 January 2024).

<sup>3</sup> “Evidence Explained: Hardcover – May 22, 2015” at Amazon (<https://www.amazon.com/Evidence-Explained-Elizabeth-Shown-Mills/dp/0806320176> : accessed 07 January 2024).

It was getting much too complicated. Should I go back to generic templates? Employing both generic and templated sources is ill advised. Or is there some other useful approach?

My frustration in finding a simple yet effective method for recording source information was shared by others, and in particular others working with Family Historian. Jeffry P. La Marca documented the citation style that he created over the course of 20 years in the book, *Simple Citations for Genealogical Sources*. He created three templates, one each for census records, traditional documents, and non-traditional sources.<sup>1</sup> Based on posts in the FHUG forum,<sup>2</sup> I cloned and edited La Marca's templates and then modified a couple of my existing custom templates using a similar approach. I renamed, rearranged, and added fields to the Simple Citations templates. After my changes they are no longer Simple Citations templates, but the 'simple' approach was an inspiration.

Details for my custom \_Universal, \_Published, and \_Census templates, including the expressions I developed for each source template format, are found in Appendix C:2. To ease data entry in Ancestral Sources I created a \_Universal subset template: \_Birth-Bapt-Marr-Death-Burial.

Because I'm 'splitting' sources, each database SOURCE RECORD must include information about the source plus details to identify the genealogical record being cited. Thus, the templates are more complex than if referencing sources alone. I still consult Mills to add appropriate detail within the more general fields of my custom source templates. They offer a choice among just a few templates for an informative, consistent, and straightforward way to keep track of and share where I find family history data.

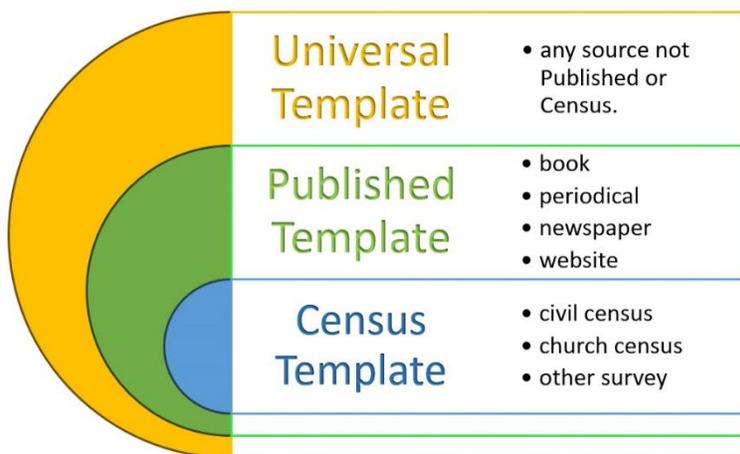


Figure 6-1: Three source template types.

<sup>1</sup> Jeffry P. La Marca, *Simple Citations for Genealogical Sources* (Family Root Publishing Co., LLC, Orting, Washington, 2023).

<sup>2</sup> "Simple Citations Templates for Family Historian 7" at *Family Historian User Group - Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?t=20862> : accessed 06 January 2024).

### Source Template Definitions

I create, clone, or edit source templates using the FH7 **Source Template Definitions** tool. A field defined within a SOURCE TEMPLATE DEFINITION RECORD becomes a field in a SOURCE RECORD or a field in a CITATION for sources created from that template.<sup>1</sup> Template fields are created within four **source template formats**.

1. Record Title Format – auto-generated from other fields (and editable).
2. Bibliography Format/Source List Entry – duplicate entries are merged into a single entry.
3. Footnote Format/Full Reference.
4. Short Footnote Format/Short-Form Citation.<sup>2</sup>

The last three template formats above are based on *Evidence Explained*, as discussed in chapter 1. In the first format, ‘record’ is used in the Family Historian rather than the genealogical sense and is the name by which that SOURCE RECORD is known within the software; I include the title of the genealogical record in the FH7’S SOURCE RECORD title so critical information will be included in GEDCOM file exports.

### Source Template Records in FH7 Projects and Ancestral Sources

Source Template **Definitions** sit outside of Family Historian projects! Each definition, including those I create, must be imported into my FH7 project file. Once added, the resulting SOURCE TEMPLATE RECORD appears in the project’s Source Template list in the Records Window. It is divorced from the corresponding definition. If I update the definition, I compare and synchronize those changes to the record in the project.

SOURCE TEMPLATE RECORDS must also be added to Ancestral Sources for the record types described below (because I selected to use Source Templates and Recording Method 1: split citation). When using Ancestral Sources, I go to the Source Template Editor screen and select each of the templates in turn. If the templates are not in Ancestral Sources, I add them from FH7.

### ~~~~~ Editing source templates, FH7:

- **Tools Menu:** Source Template Definitions...
  - > **Collection:** \_BJ-Custom, **Category:** MASTER, **Template:** \_MASTER-to clone > Highlight record > Clone
  - > View/Edit...
  - ◇ use <angle-bracket expression> as needed to manage blank output results
  - > Save > Close editor.
- Compare/Sync With Source Template Record... which opens Compare Source Template Definition to Source Template Record Window.
  - > View/Sync > Add to Project > Close.

---

<sup>1</sup> Calico Pie Limited, “Source Template Formats” at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html> : accessed 25 November 2022).

<sup>2</sup> “Understanding Expressions” at *Family Historian User Group – Knowledge Base* (<https://fhug.org.uk/kb/kb-article/understanding-expressions/> : accessed 25 November 2022).

### Adding FH7 source templates to Ancestral Sources, AS:

- **fh7 Tools Menu:** Ancestral Source Data Entry plugin.
- **AS Tools Menu:** Source Template Editor.
  - > **Source Type Menu:** Source Type > click New.
  - > **All Templates Dropdown Menu:** select template > click Save.

### Merging SOURCE TEMPLATE RECORDS, FH7

- Select destination record.
- **Edit Menu** (toolbar): > Merge/Compare Records.
  - > Select record(s) to merge > OK
  - > Follow prompts.

### Source template resources, FH7 and AS:

- FH7 Help page includes links to several detailed source template pages: [https://www.family-historian.co.uk/help/fh7/hh\\_start.htm#sourcetemplateformats.html](https://www.family-historian.co.uk/help/fh7/hh_start.htm#sourcetemplateformats.html)
- “Introduction to Ancestral Sources (Level: Beginner)” on “Ancestral Sources Videos” page at *Family Historian User Group – Knowledge Base* by Nick Walker: <https://fhug.org.uk/kb/kb-article/ancestral-sources-videos/>
- “Source Template Formats” by Calico Pie, Ltd. at Family Historian Help: <https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html>.
- “Auto-text Templates” at *Family Historian User Group – Knowledge Base* by Nick Walker: [https://ancestral.fhug.org.uk/webhelp/hh\\_start.htm#html/hs185.htm](https://ancestral.fhug.org.uk/webhelp/hh_start.htm#html/hs185.htm)
- “Understanding Expressions” is a compilation of expressions that Family Historian User Group members have found useful: <https://fhug.org.uk/kb/kb-article/understanding-expressions/>.
- “Simple Citations for Genealogical Sources” by Jeffrey P. La Marca: <https://simplecitations.com/index.html>

### Source Title

Family Historian offers `Title` and `Short Title` fields for every source. I attempted to better understand source titles by posting a query in the online FHUG forum which prompted 50 replies (I was not the only one confused; imprecise FH7 help text didn’t help).<sup>1</sup> Tags for both a title and a short title are included in GEDCOM 5.5 and are likely to be recognized by other genealogical programs. The forum discussion considered the merits of using the two, given that FH7 help suggests that only the `Title` (a.k.a., long title) is needed.

#### Short Title

Short titles let me know at a glance the focus (individual, family, or place), the timeframe, and the general topic. Short titles mimic my document filenames, offering the ‘who,’ ‘what,’ ‘when,’ and ‘where’ (*see* Digital Document Workflow section, chapter 5). This is consistent with Mills’ advice to offer “only the minimum details needed to (a) recall and identify the

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<sup>1</sup> Bruce Jacobson [BEJ], “Source Record Title confusion” topic 21603 at *Family Historian User Group - Forum* (<https://fhug.org.uk/forum/viewtopic.php?f=32&t=21603> : accessed 03 March 2023).

source and (b) disambiguate it from any similarly named sources.”<sup>1</sup> I replace underscores with commas when I enter short titles, and both short and long titles end with a period.

If a location is the focus of the source, a country abbreviation is always included first in the short title, followed by a hyphen: e.g., (SWE)-Dälden, 20180000, vicinity-map. This positions them at the beginning of alpha-ordered lists. I use ‘cns-yyyy’ to being census records.

### Long Title

My FHUG forum question was about the `Title` field and, more generally, the transferability of my FH7 data to other platforms I use and those used by anyone who may utilize my research. I tried to clarify how the FH7 titles are treated by GEDCOM. My goal is to ensure that the essential information from the title of a genealogical record is recorded in a GEDCOM file exported from FH7 in a way that it is more likely to be interpreted correctly by other genealogical applications. This is especially important for templated sources because, as noted earlier, the data generated by a FH7 source template may not be understood by other software. My conclusion from the forum is to use the long title to reference essential bibliographic information about a genealogical record found within each source.

By default, FH7 populates the `Title` field with the IPTC metadata description. I’ve turned off the “Copy Image Tag Values to the Media Record” setting and, instead, autogenerate the long title with source templates. In all cases I then edit titles in my custom **Edit Titles Tab** to clarify, shorten, or remove redundancies. Edits are not over-ridden by future updates to source templates (though a new autogenerated title is a possibility). ‘Splitting’ has implications for referencing genealogical information: for example, the long title usually includes the page number or other locator within the source.

Family Historian v7 implemented word processing features in all notes and `Text from Source` fields. These include fonts and text styles, text and highlight coloring, paragraph styles, and tables. However, word processing does NOT apply to the long title field. As a reminder, Family Historian considers the title as a description of the SOURCE RECORD and I use it as the title of the **genealogical** record. Thus, I need a technique to format words, such as book titles, that should be rendered in italics within narrative reports.

My first idea was to embrace any words that should be italicized with underscores (e.g., `_title_`) to signal the need for formatting outside of FH7 because Microsoft Word optionally autoformats such marked characters to italics. I then discovered that option applies only as I type, not when I paste text into a Word document. Also, I realized GEDCOM and Family Historian utilize underscores in coding, which might be confusing to anyone familiar with GEDCOM-based software. I now use the style code or HTML tag for italics to embrace any

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 831. She makes this admonishment about Subsequent Notes, but it applies equally here; besides it’s fun to use the word ‘disambiguate.’

words in a long title that should be rendered in italics: `<i>title</i>`. The '`<i>`' tag is widely known and its meaning should be clear, even to those unfamiliar with computing terms.

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*See section below, FH7 Source-Related Data Entry.*

## FH7 Citations

In other styles of writing, I use the author-date format of Chicago Manual of Style (CMOS) or American Psychological Association (APA) to cite the material I've consulted. These mainstream formats were developed for published material that is created with the intent to disseminate it widely, e.g., books. The 'go to' sources for genealogists are unpublished materials created for limited sharing or for preservation only that are printed, imaged on film, or produced digitally. Referencing these sources sometimes conflicts with standard academic advice. For family history—with the wide variety of specific resources consulted and the need for layering in ways not common in other disciplines' documentation—I approach citation differently than other styles of writing.<sup>1</sup>

I employ Chicago humanities style as elaborated by Elizabeth Shown Mills' advice in *Evidence Explained* when preparing a family history document. I use Mills' three documentation formats: source list entry (a.k.a. bibliography), first reference note ('footnote' entry in FH7), and subsequent note ('short footnote'). After preparing 800 pages of style guidelines and examples, Mills acknowledges that citation rules cannot be applied to all records one may encounter during family history research. She posits that

citation is an art, not a science. As budding artists, we learn the principles—from color and form to shape and texture. Once we have mastered the basics, we are free to improvise. Through that improvisation, we capture the uniqueness of each subject or setting. As historians, we use words to paint our interpretations of past societies and their surviving records. In order to portray those records, we learn certain principles of citation—principles that broadly apply to various types of historical materials. Yet records and artifacts are like all else in the universe: each can be unique in its own way. Therefore, once we have learned the principles of citation, we have both an artistic license and a researcher's responsibility to adapt those principles to fit materials that do not match any standard model.<sup>2</sup>

Thankfully, Elizabeth Shown Mills stated my understanding of citations, which differs from Family Historian terminology that had confused me. She states, "citations are statements in which we identify our source or sources for a particular assertion."<sup>3</sup> After considering 35 postings in response to a topic I entered in the FHUG forum, I now also understand that a **Family Historian citation** is composed of (a) a link that connects a SOURCE RECORD with one fact, (b) fields for specifying where within a source certain genealogical information can be found,

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), 2.18, pp. 50-51.

<sup>2</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 41.

<sup>3</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 42.

and (c) links to associated data such as MEDIA or NOTE RECORDS. Citation fields could be empty when splitting sources, with the citation holding only links and any reference details contained in the SOURCE RECORD.<sup>1,2</sup> An example of a split citation for a templated SOURCE RECORD is shown under the heading citation-specific details in Figure 6-2 Citation Window example. **So, a Family Historian citation does more than simply identify the source.**

When a FH7 citation is created it looks in the project for the source template selected and uses field codes stored in that template's formats to generate citation entries. Field codes within each template format are then replaced with the actual field values found in the linked SOURCE RECORD. Multiple citations can be associated with any source by adding a citation in the Citation List Pane of an Individual Property Box or Family Property Box. Ordinarily there will be no need to modify the existing FH7 SOURCE RECORD.

A fact can have multiple citations and several different facts can have identical citations. To illustrate, if 5 individuals were each linked with both a census fact and an occupation fact then 10 citation RECORDS would be created, all having the fields defined as citation fields in the template. Completely different data could be entered into each of those 10 citations.<sup>3,4</sup>

The order in which citations appear in a FH7 fact matters when retrieving information using a query. **I arrange citations regarding perceived reliability.** Family Historian MEDIA RECORDS (and photo frames) can be linked to sources through citations once digital files have been uploaded to FH7 (*see* Digital Document Workflow section, chapter 5).

### **Bibliography vs. Footnotes**

My approach to citation while working in Family Historian differs from when I am preparing a document for publication. Within Family Historian I've further modified Mills' CMOS guidelines into my 'simple' citation style, generated by FH7 source templates (*see* source templates subsection of this chapter). As part of my simplification, I dropped the use of FH7 bibliographies. I agree with the approach expressed by a Family Historian user who creates "extensive footnotes" in their FH7 reports and doesn't "see the need for a (FH7 constructed) bibliography." The user includes in their reports information about

where to locate source material to guide a researcher instead. It is a manually prepared list not dissimilar to an annotated bibliography.

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<sup>1</sup> Family Historian User Group, "Sources and Citations in Version 07 (for New Users): What Are Sources and Citations" at *FHUG: Family Historian User Group — Knowledge Base* (<https://fhug.org.uk/kb/kb-article/sources-and-citations-in-version-7-for-new-users/> : accessed 26 November 2022).

<sup>2</sup> Calico Pie Limited, "Source Template Formats" at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html> : accessed 25 November 2022).

<sup>3</sup> Family Historian User Group, "Understanding Source Templates" at *FHUG: Family History User Group, FHUG Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=21211> : accessed 28 November 2022).

<sup>4</sup> Calico Pie Limited, "Source Template Formats" at *Family Historian Help* (<https://www.family-historian.co.uk/help/fh7/sourcetemplateformats.html> : accessed 25 November 2022).

Family history research differs from historical research where a bibliography is best practice and source material is not predominantly a collection of online databases and digital collections where citations are what matter (and not the website collection or the online location they came from which will change over time).

For example, as a history graduate, I would cite precisely where I found an item in a newspaper but the bibliography would only contain the title of the newspaper. Having a long list of newspaper titles in a bibliography is meaningless in family history research but having extensive footnotes pinpointing where I found relevant items necessary. Instead, I will be including information on where to find digital images of newspapers or holdings of physical newspapers in my 'annotated bibliography'.<sup>1</sup>

My Family Historian documentation, which relies on footnotes, includes all the information someone would need to assess the evidential value of a source.

The screenshot shows the 'Citation Window' in Family Historian. The main area is titled 'Prepared Citation' and contains the following fields:

- Source Record [166] - 311 citations
- Paste Filename: PetersonAJ+SundbergAC, 19700000, grp-sheets-by-LindquistAO.
- Keepsake (keep/no)?: keep
- Select Record Creator Type: individual
- Select Repository: privately held by Bruce Edwin Jacobson
- Publisher: (empty)
- Simple Creator: Augusta "Guttie" Lindquist
- Creator Entity: state, agency, country, church denomination, company, etc.
- Dept. Or Office: department, parish, office, etc.
- Jurisdiction: ,,New Haven,,Connecticut,USA
- Creator Individual: Augusta O. Lindquist
- Creator Role: Indiv: compiler
- Date Source Created: 1970

Below these are 'Prepared Citation Details' fields:

- Assessment: (dropdown)
- LUMP Record Date: (text)
- Where in Lump Source: (text)
- Event Type Responsible: (dropdown)
- LUMP Citation Note: (text)

At the bottom, it shows 'Source media: 1 Prepared citation media: 0' and buttons for 'Enable Automatic', 'Copy Citation', and 'Data Entry Assistant'.

The right-hand pane shows the citation output:

- Footnote** (no text)
- Short Footnote** (no text)
- Bibliography**: "Family History: Anders Johan and Anna Charlotta Lindquist", by Augusta "Guttie" Lindquist (New Haven, Connecticut, USA, 1970); group sheets photocopy, re: Anders Johan Petersson (Lindquist) and Anna Charlotta Sundberg (Linquist) families.

Figure 6-2: Citation Window example.

<sup>1</sup> Tamara [t4ms], "Re: Handling identical source names" at FHUG Family Historian User Group, FHUG Forum (<https://www.fhug.org.uk/forum/viewtopic.php?p=145206#p145206> : posted 12 March 2024; accessed 13 March 2024).

## Finding Aid and Index Citation

“In the framework of history research, an index is usually a tool, rather than a record.”<sup>1</sup> Elizabeth Shown Mills goes on to explain that the veracity of indexed information is questionable due to the variables that lead to the compilation. Indexes and finding aids are useful in locating genealogical records, but the original source should then be cited in final historical works. The original record should never be cited if only an index, finding aid, or other referring source supplied the useful information. Similarly, as discussed in chapter 2, the creators of the Swedish genealogy website ArkivDigital caution that “an index is only an index” and “one should always check the original source.”<sup>2</sup>

## Online Material Citation

Citing online material can be especially complex. Mills offers four basic rules regarding online sources.

**Rule 1:** Most websites are the online equivalent of a book [not a repository] . . . .

**Rule 2:** A website that offers multiple items by different creators is the equivalent of a book with chapters by different authors. . . .

**Rule 3:** A website is a publication, not a repository. . . .

**Rule 4:** Websites require a thoughtful examination.<sup>3</sup>

Genealogy websites, like Ancestry and FamilySearch, offer citations inconsistent with the style I’ve adopted; I do not copy them.

## FH7 Prepared Citations

The Prepared Citation Window allows me to create a temporary prepared citation, or a citation to an existing source. It contains details for the citation that will be linked to facts discovered within the source. There is only one prepared citation in a project at one time; there may be none. The prepared citation is saved in the FH7 HEADER RECORD and, while it survives closing and reopening the project, it disappears when overwritten with a newly prepared citation, i.e., when I move on to the next source. If I wish to use a prepared citation, I can go to the bottom of the Prepared Citation Window and `Enable Automatic`, which adds the Automatic Source Citation panel just below the Main Toolbar. The advantage of the automatic source citation is that a single record can be applied to multiple facts, like the way Ancestral Sources operates for civil and church records.

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 48.

<sup>2</sup> Arkiv Digital AD AB, “BiS, Population of Sweden, 1800-1947” at *ArkivDigital* (<https://www.arkivdigital.net/online/register/population-of-sweden> : accessed 25 April 2023).

<sup>3</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), p. 57.

## Parent-Child Citation

A certified birth certificate or adoption decree are two ways to verify a parent-child relationship. To be able to cite these and other records claiming such a relationship I must add witnesses to the child's FH7 birth event. "Fact Witness Roles of Mother and Father for Birth, Baptism & Christening events are identifying relationships not saying they were present at the event."<sup>1</sup> If there is not a record documenting the relationship, then the witness roles are not added.

To document with a citation that X is the child of Y (or Y is the parent of X) I add the witness role of father, mother, or parent to X's `birth` fact. Usually,

when you add someone as a witness to an event, they will get a sentence in narrative reports, describing their role in the event. But you don't want that to happen with a parent because the narrative report will list their children anyway, and the sentence would consequently be redundant. For this reason, by default, the father, mother, and parent roles for a birth event are marked to be excluded from reports (you can mark any sentence to be excluded from narrative reports by clicking on the little button to the right of the Sentence field, and choosing Exclude Sentence on the dropdown **menu** that appears).<sup>2</sup>

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*See section below, FH7 Source-Related Data Entry.*

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<sup>1</sup> Mike Tate [tatewise], "Recording the sources for a relationship" at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=77&t=21838> : posted 08 May 2023; accessed 17 May 2023).

<sup>2</sup> Calico Pie Limited, "How to Cite Sources for Relationships," at *Family Historian Help* ([https://www.family-historian.co.uk/help/fh7/hh\\_start.htm#howto\\_recordsourcesforrelationships.html](https://www.family-historian.co.uk/help/fh7/hh_start.htm#howto_recordsourcesforrelationships.html) : accessed 12 May 2023).

## FH7 Source-Related Data Entry

A SOURCE RECORD holds data about individuals and families in Family Historian. Fully citing where biographical information was found includes details about where the genealogical record was in the source, about the source itself, and sometimes about the repository. Documenting sources is one the most tedious and often overlooked — yet essential — tasks in genealogy.

### Adding a source, AS:

**Note:** Enter civil and church facts in AncestralSources, and then finalize the SOURCE RECORD in FH7.

- **FH7 Tools Menu:** Ancestral Sources Data Entry > **AS Tools Menu:** Source Templates... (Editor) > Select source template and complete bare-bones source fields.
  - > complete fact-related fields. *See* Civil and Church Record Facts.
  - > Save File > Proceed to FH7, complete source, and add media.

### Adding a source, FH7:

**Note:** Enter civil and church facts in AncestralSources, and then finalize the SOURCE RECORD in FH7.

- **FH7 Add Menu:** Source/Citation > Create Source from Template/Prepared Citation... > \_Custom Collection and enter info.
  - > enter `Source Categories`:
    - ◇ (a) first-original, (b) original, (c) derivative, or (d) authored.
  - > enter `Media Tag`:
    - ◇ abm, air, art, aud, cns, obj, ltr, pic, pub, txt, or vid
    - ◇ media or keepsake
  - > enter transcription in `Text From Source`:
    - ◇ first line blank to aid report formatting
    - ◇ use quotation marks for verbatim text.
  - > describe the source's physical characteristics in `Note` field (dimensions, pages, etc.);
    - ◇ add other info as a new note in **Source Notes Tab:** `Add Note` > `Add Local Note`
  - > **Edit Titles Tab:** *See below*, Editing long and short titles.

### Using a prepared citation, FH7:

- **Main Toolbar:** Source > View Prepared Citation.
  - > Prepared Citation Window > Enable `Automatic` which adds the Automatic Source Citation panel just below the **Main Toolbar**.
  - > enter citation into the Citation Pane of the Facts Window (or Copy Citation and manually paste the citation).

### Adding split citation, FH7:

- Open Individuals Property Box or Families Property Box, click Yellow Scroll to show sources.
- Click Add Citation and select a source in the citation pane of the window.
 

**Note:** May have to resize window to see Add Citation.

Optional Method.

- Copy Citation from current Prepared Citation and paste in citation pane.
- ◊ select assessment from dropdown: primary evidence, secondary evidence, questionable, or unreliable.
- ◊ enter Note if appropriate to draw attention or explain any part citation-specific info from the source.

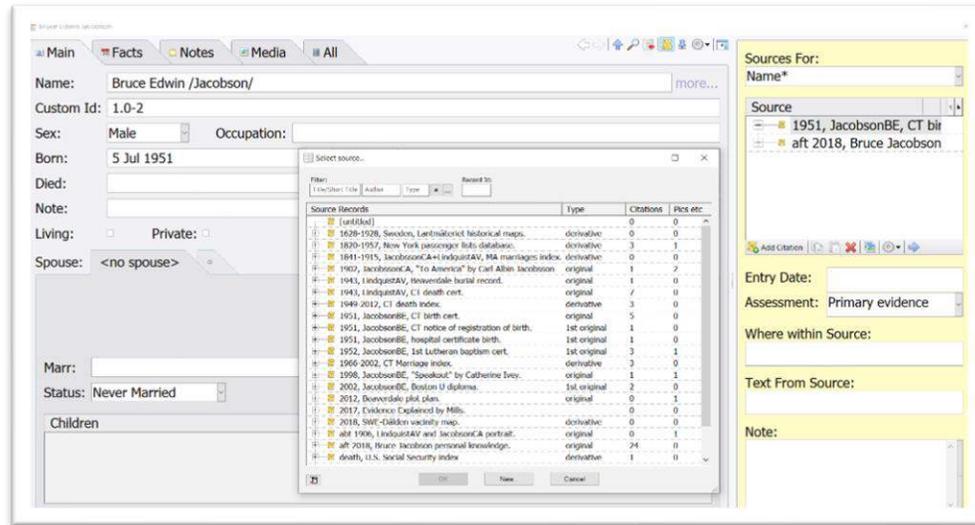


Figure 6-3: Adding split citation, FH6

### Completing additional citation fields for **lumped citations**, FH7:

- Where within Source, with page number, for example.
- Text From Source, with any specific text from record not already in source text.
- Date of Entry, for personal knowledge entries.
- Note, with any other explanatory information; add specific details that qualify me as a credible source for personal knowledge.

### Ordering multiple citations, FH7:

- Arrange citations in the preferred order of veracity. For a birth date, for instance:
  - 1 Birth Certificate – created soon after the event by people with first-hand knowledge (usually!).
  - 2 Baptism Register – same as birth certificate.
  - 3 1939 Register – what the individual themselves thought their date of birth was (but is subject to deliberate massaging or transcription error).
  - 4 Death Certificate or Index – what somebody else thought the date of birth was.
  - 5 Gravestone – same as death certificate.<sup>1</sup>

<sup>1</sup> Mark Dunbar [Mark1834], "Re: Multiple Source Citations," at *FHUG: Family Historian Users Group*, FHUG Forum (<https://www.fhug.org.uk/forum/viewtopic.php?p=114767#p114767> : posted 25 May 2021; accessed May 2021).

**Formatting long titles, FH7:**

Long titles are autogenerated by source templates.

- Edit as needed in the **Titles Tab** of the SOURCE RECORD.
  - follow Mills' basic rules; include any 'split' page number and 'parent' source for part of a work

*Table 6-3: Record Creator Types*

| CREATOR TYPE              | SAMPLE RECORDS FOUND IN SOURCE                                                                                                                                                                                                                           |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| business                  | finances and accounting, permits, licenses, guild and trade membership, officers, employees, occupation, retirement, pension, physical description, education, awards, work history, indenture, apprenticeship, health issues, etc.                      |
| cemetery operator         | names, birth, death, cremation, internment, family members, other individuals associated with deceased, military service, occupation, religion, residence, plat ownership and location, etc.                                                             |
| census authority          | residence, birthplace and date, marital status and date, family members, occupation, military, real estate, immigration, naturalization, education, etc.                                                                                                 |
| church                    | birth, baptism, marriage, annulment, death, gender, circumcision, religion, bar/bat mitzvah, confirmation, first communion, ordination, etc.                                                                                                             |
| civil agency              | birth, death, marriage, divorce, gender, adoption, names, real property mortgaged or owned, taxes paid, financial status, etc.                                                                                                                           |
| court/probate             | cause of death, divorce, name change, imprisonment, possessions, guardians, family members including foster and adoptive, others close to individual, financial status, burial, financial status, etc.                                                   |
| individual                | personal information about all kinds of events and attributes associated with focus individuals and families; especially life-changing events.                                                                                                           |
| migrant-related authority | departure, arrival, naturalization, citizenship, names, family members, birth, marriage, dates and mode of travel, health, language spoken, etc.                                                                                                         |
| military                  | birth, baptism, marriage, death, occupation, hobby, education, divorce, military service, names, family, physical description, residence, address, etc. names, birth, death, gender, medical conditions, campaigns, spouse, discharge status, rank, etc. |
| nonprofit NGO             | names, medical conditions, group membership, hobby, physical description, financial status, adoption, family members, etc.                                                                                                                               |
| school (formal/informal)  | training, avocation, course of study, friends, graduation place and date, parents' names, physical description, hobbies, etc.                                                                                                                            |
| writer                    | all manner of <u>analyzed</u> biographical details, historical context, reports, and news concerning focus individuals and families.                                                                                                                     |

- Prepared Citation Window: **Edit Titles Tab** to remove redundancies or for clarity;
  - ◇ **published standalone works**: copy exact title in italics (book, cd, DVD, journal, map, website, etc.)
  - ◇ **collection, file, series, sub-series, and record group** copied exactly, using headline-style capitalization; file titles may carry quotation marks for clarity, titles of larger record sets do not
  - ◇ **parts of a published work**—such as a chapter in a book, an article in a journal, a song on an album, or a database at a website copy exact title in quotation marks
  - ◇ **unpublished manuscript or typescript**: copy the title exactly with quotation marks

- ◇ when a manuscript or record book has **no title**, create generic description; do not use italics or quotation marks (not quoting anything).
- ◇ record long title in **original language** with any needed translation in square brackets.<sup>1</sup>
- ◇ for **online church** records, put exact title in quotation marks.<sup>2</sup>
- ◇ spell author/creator's name as presented; if database, the author is the compiler.
- ◇ All titles end with a period (.).

#### Applying one source to multiple facts:

- Prepared Citation Window: Enable Automatic and follow directions.

#### Editing **short titles**, FH7:

- Prepared Citation Window: **Edit Titles Tab**.
  - ◇ accept file/media name for short title ;
  - ◇ replace underscores with commas.  
(e.g., focus, YYYYMMDD, media descriptor-separated-by-hyphens)
  - ◇ delete media type and, if relevant, keepsake ID.

#### Examples – Long title:

- "Speakout Centers on Living in Fear" in Bangor (Maine) Daily News\_02 February 1998, archived HTML edition, by Catherine Ivey (<http://www.qrd.org/qrd/www/usa/maine/bdn-2.2.98.html> : accessed 24 February 2019).
- Fösamlingsbok för Velinga församling 1895–1917 (AID: v154333.b38.s28, NAD: SE/GLA/13619), Anders Johan Peterss. Lindqvist on page 28, by Velinga parish (R) (<http://www.arkivdigital.se/aid/info/v154333.b1> : accessed 18 January 2020); online parish register (Alla:1).
- "Family History: Anders Johan and Anna Charlotta Lindquist," by Augusta O. Lindquist (New Haven, Connecticut : 1970) ; typescript photocopy.
- Master of Education Diploma for Bruce Jacobson, by Boston University (Boston, MA : 2002).
- Bridgeport City Directory including Stratford, Fairfield and Southport\_, by The Price & Lee Company (Bridgeport, CT : 1910).
- Evidence Explained: Citing History Sources from Artifacts to Cyberspace\_, by Elizabeth Shown Mills (Kindle e-Edition : 2017).

#### Examples – Short title:

- JacobsonBE, 19520000, 1st-Lutheran-baptism-cert.
- JacobsonBE, 19510705, CT-birth-cert.
- (SWE)-Dälden, 20180920, vicinity-map.
- cns-1895-1917, Valinga-parish-bks-p28.

#### Reporting sources and citations, FH7:

- **Publish Menu**: Custom Reports > Source Summary Report (copy) .

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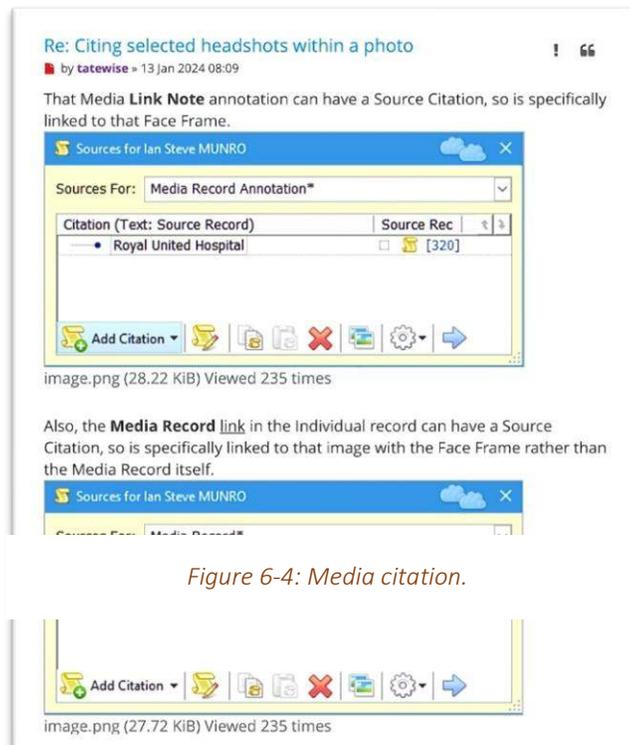
<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), pp. 52–53.

<sup>2</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), 7.18, p. 333.

- **Publish Menu:** Record Detail Reports > Record Detail - Source.
- **Publish Menu:** Special Data Reports > Data - Source Types : displays record creator type
- **View Menu:** Query > All Custom Queries > Sources for Given Record (copy).
- **View Menu:** Query > All Custom Queries...> Sources by Title.
- **View Menu:** Query > All Custom Queries...> Source by fact.
- **View Menu:** Citations to Source Record...
- **View Menu:** Query > All Custom Queries...> Unsourced Facts
- **Tools Menu:** List All Citations for a Selected Source
  - > select source > OK.
  - ◇ Finds all the citations to a source and list: record, fact, entry date, where within source, and text from source.

**Citing media, fh7:**

- **Media Window: Links Tab > Add Frame Link or Add Simple Link**
  - > Link to:
    - ◇ an Individual
    - ◇ a Family
    - ◇ a Place
    - ◇ a Source Record
    - ◇ nothing (note only)



### Citing parent-child relationships, FH7:

Method A.

- Child's Property Box > **Facts Tab** > double click birth event

Method B.

- : Witness icon in toolbar
  - > Witness Window > add individual as father, mother, or parent.
  - > Add citation.

### Viewing footnotes and bibliography citations, FH7:

- Select source in source list.

Method A.

- **Main Toolbar:** Source > Prepare Citation to Existing Source
  - > Prepared Citation Window displays resolved citation.  
*Note:* Ignore the confusing titles of these **menu** items and windows.
  - > at top of window: Show Side Panel

Method B.

- Open any individual's Property Box and select a fact with a citation.
  - > at the bottom of the citation pane: Edit Citation
  - > Citation Window displays resolved citation.
  - > at top of window: Show Side Panel
  - > close Prepared Citation Window.

### Converting generic census sources, AS:

- Watch: [https://www.youtube.com/watch?v=IBKVEa\\_tbiA](https://www.youtube.com/watch?v=IBKVEa_tbiA)

## FH7 Notes

A NOTE RECORD holds one standalone note that can be shared by multiple other RECORDS. One must use the `Add Note > Shared Note Record...` command to create a NOTE RECORD.

The **Notes Tab** can show up to five types of notes for individuals. The first three types listed below are added there and the fourth type is added only in the **Facts Tab**. See Research Plan and Log section, chapter 3, for info about the fifth type, research notes.

1. individual note – the most common type; e.g., applies to one individual overall such as about their name.
2. shared note for a couple – applies to both partners in a family couple; added only when the current RECORD is INDIVIDUAL
3. shared note – applies to multiple individuals in various records (not just two spouses).
4. fact note – about an event or attribute associated with an individual or family; can only be added in the **Facts Tab** .

### Local Notes

A local note may be added to INDIVIDUAL, FAMILY, SOURCE, REPOSITORY, MEDIA, or PLACE RECORDS and for any fact and are internal to the RECORD to which they were added. The FH7 default is to then display the first note for an individual or family in the **Main Tab** of their Property Box, which I found confusing when viewing individuals. I removed it there and rely on the **Notes Tab** to add, view, and edit fact notes about individuals. I left the first note displayed in the **Main Tab** of the Family Property Box. There is no limit on the number of notes.

#### Listing notes for individuals, FH7:

- >Records Window or Focus Window or Diagram: Select individual
- **Tools Menu**: Notes List for Individual
- ◇ Lists all notes linked to a selected individual.



## 7. FAMILY KEEPSAKES

My brother, Carl Ridgeway “Rick” Jacobson, and I were co-executors for the estate of our mother, Dorothy Helen Phillips (Jacobson). Her estate encompassed belongings from a married life shared with our father, Carl Edwin Raymond Jacobson, as well as material from our childhood, each of their lives prior to marriage in 1945, and keepsakes from their parents’ homes. The estate also included belongings of our father’s aunt, Augusta Ottilia “Guttie” Lindquist. Our home at 678 Buckingham Avenue in Milford, Connecticut, held these items until they were divided between my brother and me at our mother’s passing in 1997.

These inherited items form a collection of family keepsakes. Some are objects that were passed down through the family. Others are documents related to our family’s past. My goal is to properly inventory, store, and interpret the family-related keepsakes—both documents and objects—so I can pass specific items to my nephews or donate others with value beyond the immediate family to professionally managed repositories.

Care of the documents is discussed in the Jacobson-Lindquist-Phillips Archives section below. (*Reminder:* A ‘document’ is “information or data fixed in some media.”<sup>1</sup>) I do not have a system for managing the objects in my possession, other than assigning an inventory ID, taking a photo, and recording as much info as I have about each one.

### Jacobson-Lindquist-Phillips Archives

I seek meaning in the family items in my possession, notably the **documents** which I have named the Jacobson-Lindquist-Phillips Archives. The absence of my maternal grandmother’s surname, Rickards, is because few items in my possession belonged to her family.

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**archives** – materials created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator, especially those materials maintained using the principles of provenance, original order, and collective control; permanent records. (also archive)<sup>2</sup>

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<sup>1</sup> Richard Pearce-Moses, “A Glossary of Archival and Records Terminology,” online database at *The Society of American Archivists* (<https://www2.archivists.org/glossary> : accessed 24 January 2020), search term: ‘document,’ definition 2.

<sup>2</sup> Richard Pearce-Moses, “A Glossary of Archival and Records Terminology,” online database at *The Society of American Archivists* (<https://www2.archivists.org/glossary> : accessed 15 April 2019), search term: “archives”, definition 1. Pearce-Moses goes on to say, “some United States archivists deprecate the use of the form ‘archive’ (without the final ‘s’) as a noun, but that form is common in other English-speaking countries.”

The family archives is at my home, 'Ferncrest,' at 39 Hodgdon Road in an area of Tremont, Maine historically known as Center (mailing address Seal Cove, 04674). I have all manner of text-based paper ranging from official instruments (e. g., deeds), to letters and diaries, to travel mementos, to drivers' licenses and membership cards, to letters, to baptismal certificates, and more. They span three generations on both my maternal and paternal lines. Some documents are one-of-a-kind originals (1<sup>st</sup> Originals).

I'm keeping all that have survived, most of which have biological information or provide context for my ancestors' daily lives. Rick has a substantial number of related items, especially family photos, in his homes at Middlesex, North Carolina, and Troy, Maine, which have been sorted though not cataloged, or conserved.

## Photographs

Given that Grampa Jacobson was a professional photographer and that Mother methodically took family snapshots, we have thousands of family photos. Over the years they have been piled in cardboard boxes and stuffed in paper envelopes for storage or pasted into albums. My brother has sorted most photographic prints by family branch or topic. Rick passed along photos to our cousins if the subject seemed more relevant to their interests. I am putting those that I hold in proper storage, making digital copies of photos that have genealogical interest, and culling those that appear to have no value whatsoever. But how do I decide if an image is worth keeping?

The principal factor for deciding whether to keep an image is whether it helps tell my family story(ies). Key to that decision is knowing what is depicted. Is the person or place identified? When was it taken? MyHeritage uses AI to estimate the date of photos using clothing, hairstyles, etc. They claim 90 percent accuracy, and are usually within 4 to 5 years of the actual date. A date is automatically estimated for all photos uploaded to MyHeritage that are not dated in the metadata (*see* photo references below). Caroline Guntur suggests using Google Lens or other AI applications when coming across unknown people or places in photos.

- Try using facial recognition to see if you get any matches; *see* Appendix F for more details on this approach.
- For unknown locations, try reverse lookups to pin down more information.
- For unknown sources of photos, try an online image search to see if you can find other people who have the same photos (and have shared it online).<sup>1</sup>

Blurry photos, duplicates, and solitary pictures of pretty sunsets are prime candidates for disposal.

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<sup>1</sup> Caroline Guntur, "Part 2: Brick Wall Busters," in the enrolled course Metadata for Genealogy, at *Courses by Caroline Guntur* (<https://www.coursesbycaroline.com> : accessed 10 October 2022).

### Photo Negatives

Coming from a family of savers, my brother and I have the original film negatives from many thousands of family photos. We have prints for some; for others, the negative is the only record. There are three sizes.

- 35 mm format film has “been employed in countless photographic applications” since its introduction for the Leica camera in the 1920s. I still have one of my own 35 mm single-reflex-lens cameras. The film is still available and there are storage options for this format.
- 127 format film was used in cameras from 1911 to the mid-1960s, including two family cameras in our collection: a folding ‘pocket vest’ and Mother’s box Brownie. 127 film is smaller than the more common 120, which means that 120 storage materials can be used if the negatives are stored flat to prevent curling.
- 616 format film was produced from 1932 to 1984 for smaller cameras such as the Brownie Junior. The film produced negatives about the size of postcards, or 2.5 inches by 4.25 inches (63.5 mm × 108 mm).<sup>1</sup>

### Transparencies

Our immediate family was a fan of vacation slideshows. I sorted and labelled a thousand or so mounted slides during the 1990s and made a few digital copies. The current task is to provide better storage and make digital copies of those with genealogical value which are in three formats.

- Kodak Ektachrome Transparency mounted color slide, cardboard frame (2" × 2", image = 1-1/2" × 1-1/2").
- Agfachrome and Kodachrome mounted color slide, cardboard frame (2" × 2", image = 1" × 1-3/8").
- Kodachrome mounted color slide, cardboard frame (2" × 2", image = 1" × 1").

### Photo resources:

- “Introducing PhotoDater™, an Exclusive, Free New Feature to Estimate When Old Photos Were Taken” by MyHeritage: <https://blog.myheritage.com/2023/08/introducing-photodater-an-exclusive-free-new-feature-to-estimate-when-old-photos-were-taken/>

### Archival Storage

Careful handling and storage will ensure that our family’s unique archival resources are conserved and accessible. I keep archival copies of documents separate from genealogy working files. There is no official standard for safe storage, however, so the adjective ‘archival’ is meaningless when buying material. Reputable suppliers are Hollinger, Light Impressions, Gaylord, University Products, and Archival Methods.

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<sup>1</sup> Wikimedia Foundation, “616 film” at *Wikipedia, The Free Encyclopedia* ([https://en.m.wikipedia.org/wiki/616\\_film](https://en.m.wikipedia.org/wiki/616_film) : page last edited 05 Dec 2018)

Generally, I store items of like kind and size together. Few original groupings of items survived the repacking and consolidation of multiple moves between households. Even so, I document groupings that I find as I process material and keep them intact.

I've chosen to store the slide transparencies in photo-safe paperboard trays within a drop-front box, after trying other methods for personal and work-related storage during the past 40 years. Other documents no larger than 8-1/2 by 11 inches are stored in metal file drawers, arranged by focus, i.e., individual, family, place, event, etc. My experience with hanging folders is that items inside tend to sag and curl over time, plus the hangers take up a lot of space. So, I use acid-free, PAT, buffered folders held in place by the installed drawer keepers. (See chapter 5 for details about naming and other filing procedures.) Appropriately-sized paperboard boxes store larger paper and photographic material flat to minimize damage.

### Digital Information

As discussed in chapter 5, my digital ARCHIVAL folder is composed mostly of TIFF and unoptimized PDF/A files. At some point I shall devise a system for migrating my digital information to new storage media due to ever-changing retrieval technology. Computer programs evolve or might even be abandoned leaving data inaccessible. For instance, I can no longer access the Apple Macintosh files in which Mother typed Carl Albin Jacobsson's "Journey to America."

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### Handling archival items:

- It's now generally accepted practice to use clean hands, washed with soap and water, for handling documents and textiles rather than wearing gloves.
- If gloves are worn, for example for handling photos, nitrile is favored over cotton due to the tighter fit, which promotes better control.

### Storing archival materials:

- Metal is the usual choice for shelves and inert plastic for containers—not PVC!
  - ◊ Acceptable plastics for safe storage are polypropylene, polyethylene, and polyester.
  - ◊ All wood off-gasses and is not suitable for storage, either as shelving or containers. Same with cardboard.
- Buffered paper should be used as interleaves, for mounting, or for containers.
- Storage materials should be acid-free, with a pH of 7.0 or greater.
- Paper and other storage materials should be free of lignin because it produces acids and darkens paper.
- UV-filtering materials help prevent light damage and fading.
- Adhesives must be pH neutral and not contain reactive chemicals.
- Archival enclosures should be the ideal size with enough support to protect fragile items.
  - ◊ Multiple containers provide layers of support.
- Unbuffered paper has been the choice for storing photos, unlike other documents, but now either buffered or unbuffered is acceptable.
- Paper in contact with photos must have passed the PAT: photographic activity test.

## Mörtfors Southern Light

Among my family's keepsakes, I have paid particular attention to an oil painting: *Mörtfors Southern Light*. The story I remember, is that the painting depicts a locale that my paternal grandparents [*farföräldrar*] visited during a trip to Sweden. While I'm not certain when they acquired it, a date written in pencil on the reverse of the canvas, at the top, and on the bottom stretcher may coincide with the trip. The script at the top reads, *Mörtfors, Aug. 1934, Soda Ljust, Kalmar Län* [Mörtfors, Aug. 1934, Southern Light, Kalmar County]. The bottom appears to be *Mörtfors Södra Ljust, Kalmar Län* [Mörtfors Southern Light, Kalmar County].<sup>1</sup> It is signed Otto Jansson. Gustaf Otto Gabriel Jansson (1879–1949) was a Swedish painter, cartoonist, graphic artist, and sculptor who settled at Mörtfors in 1915.<sup>2</sup>



Figure 7-1: Mörtfors Southern Light by Otto Jansson, abt. 1934. (photo 2019)

During my childhood the painting hung on the brick chimney, over the fireplace, in my *farföräldrars* home at 21 Hawthorne Avenue, Hamden, Connecticut. Grampa Jacobson's chair was near the hearth. He smoked cigars. Heat from the chimney breast and years of exposure to cigar smoke damaged the canvass, paint, and frame.

I have hung the painting in my house at Hodgdon Road, Seal Cove, Maine, since before my mother's passing in 1997. In 2018, The Maine Project for Fine Art Conservation assessed its condition, at my request. I then engaged MEAC to conserve the painting, which was

<sup>1</sup> Google translation.

<sup>2</sup> Wikimedia Foundation, "Otto Jansson," at *Wikipedia, Den Fria Encyklopedin* ([https://sv.wikipedia.org/wiki/Otto\\_Jansson](https://sv.wikipedia.org/wiki/Otto_Jansson) : page last edited 12 October 2018), in Swedish.

completed in 2019.<sup>1</sup> Unfortunately, they lost the stretcher that had the place and date of the painting written in pencil. Photos of the stretcher and the back of the canvas, where the pencil record also existed, and a Mylar tracing of the place and date are now the only documentation of the painting's provenance (I inserted the tracing between the back of the canvas and the stretcher). Furthermore, the painting no longer fit in the original frame, so that has been replaced (though I have kept it).



*Figure 7-2: Canvas back (top) and stretcher (bottom) of Mörtfors Southern Light.*

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<sup>1</sup> Project MEAC: The Maine Project for Fine Art Conservation, "Damage Assessment, Treatment and Conservation Bill [for Mörtfors Southern Light]" (142 High Street, Portland, Maine: 08 January 2019); Bruce Edwin Jacobson, "ADDENDUM: Otto Jansson, Artist" (4 December 2018), attached to Project MEAC, "Damage Assessment."

## Keepsake Inventory

I keep an inventory of personal and family keepsakes in Catalogit, a cloud-based collections management system. Though I created the inventory primarily for keeping track of my Jacobson-Lindquist-Phillips Archives, it holds entries for all keepsakes (documents and objects) in my stewardship. Those keepsakes include one-of-a-kind documents held as digital and as ‘hard’ copies, and 3-D objects passed down to or acquired by me.

Previously, I attempted to use an Airtable base for the inventory, but images are only available in an Airtable export for two hours and there are no free reporting options. I found that inserting images in Excel was problematic when I tried to put the inventory in a simple spreadsheet. So the best solution seems to be keeping the inventory in Catalogit and capturing data and images with frequent reports. The saved reports, printed or as PDFs, provide a permanent record should I no longer subscribe to Catalogit.

Because I do not require a museum-quality cataloging system, I employ a fraction of Catalogit’s capabilities. I use one of five categories in their classification hierarchy: ‘Collectible,’ which is meant primarily for archives, art, audio recordings, motion pictures, objects, photographs, publications, and vehicles. Table 7-1 shows the inventory fields that I typically use, with mandatory fields for each of my entries indicated. I complete other fields as needed.

### Keepsake ID

**Keepsake IDs** link my keepsakes and the information about them in my Catalogit inventory. I write IDs in pencil on physical items (or on an attached paper tag) and use the IDs in filenames, primarily for digital one-of-a-kind documents (1<sup>st</sup> Originals) held in my Jacobson-Lindquist-Phillips Archives. I also apply the IDs to archival documents with critical information that simply might be difficult to relocate, such as newspaper clippings lacking any publication data. Each Keepsake ID is composed of a three-letter ‘media type’ tag followed without space by a four-digit number, assigned consecutively for each like-kind grouping: art0001, for example. Media types are described in Table 5-1: Ten Media Types. I initially assigned numbering in parentheses, which were distracting and took valuable space in filenames.

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**keepsake ID** — a link between items in the Jacobson-Lindquist-Phillips Archives and information about them in a database.

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Some items may have several parts. In these cases, such as slideshows on a single subject, I append a decimal point followed by numbers for each part. This practice maintains the correct sequence in ordered lists. For example, art0001.1, art0001.2, etc. Museums sometimes use letters for this purpose but I tried it and after 26 items that approach got complicated.

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**Creating inventory entries, Catalogit:**

-  icon > add media >
  - ◊ a thumbnail or screenshot preferred; documents already stored in multiple locations.
  - > **All** Entry Types: Collectible > Done.
  - > Name/Title
  - ◊ for **genealogical** documents configure similar to FH7 source Short Title; all other Titles simply descriptive.
  - > Complete fields as indicated in Table 7-1.
  - > Create.

*Table 7-1: Keepsake Inventory Fields*

CATALOGIT FIELD	DESCRIPTION
Entry Name*	Short and descriptive. Follow Short Title format for FH7 media ARCHIVAL copies.
Object ID*	Keepsake ID (abm-, air-, art-, aud-, obj-, ltr-, pic-, pub-, txt-, or vid-).
Description*	Same as metadata description if a digital file; include details such as size and date.
Tag*	Select document media type tag.
Category*	Select: album (abm), air, art, aud (audial), object (obj), letter (ltr), picture (pic), publication (pub), text (txt), video (vid) or subordonates.
Location*	Select physical storage location: File cabinet 1, Flat box 4, Ferncrest storage, Digital ARCHIVAL Folder, etc.
Location > Note	Copy and paste filename of digital documents when location is computer or cloud storage.
General Notes	Anything else worth noting.
General Note > Keywords	Paste digital document's metadata keywords.
Image*	Copy of picture file or new image of other documents and objects.

\* mandatory.

**Reporting keepsake inventory, Catalogit:**

Individual Item Report

- **Open item – three dots’** menu , upper right: Print
  - > Page > Page Setup > All > select properties to print
  - > Print

Inventory by Folder; e.g., Jacobson-Lindquist-Phillips Archive

- **‘hamburg’** menu , upper left: select folder (ex., All Entries).
  - > **‘three dots’** menu: Report: Inventory.

Entries by Location

- **‘hamburg’** menu , upper left: Profiles > Location > select desired location.
  - > **‘three dots’** menu: Usage Report > complete Page Setup > Print.

## Entries by Format

- **'hamburg'** menu , upper left: Profiles > Tag > select desired tag.
- > **'three dots'** menu: Usage Report > complete Page Setup > Print.

## Reporting J-L-P archives inventory, FH7:

- *J-P-L Archive Inventory (custom query)* > Run.
- > **Save Menu:**  > Save As Comma-Separated CVS File (ANSI): ANSI is outdated character encoding but is the one that works.
- > **Excel File Menu:** Open.

## Exporting keepsake data and media, Catalogit:

- **'three dots'** menu , upper right: Export > CVS > select properties to export:
  - ◇ Media type to export – 'Original as JPG'
  - ◇ Media basename (i.e., filename) prefix – 'Entry/Object ID'
  - ◇ Repeating data – 'Include all items'
- > Next > Export.

## Converting Catalogit export to ANSI format, Notepad/Excel:

Catalogit exports data as a CSV (comma-separated values) file, which is most readily manipulated in Microsoft Excel. However, Excel is unable to properly display UTF-8 compliant CSV files when they contain non-English characters. To resolve this, I change the CSV file to ANSI format, either in Excel or Notepad.

## Notepad

- Open exported CSV file > File > Save As.
- > Select 'ANSI' from the 'Encoding' field > Save.
- > Open this new CSV file using Excel.

## Excel

- Open blank workbook > **Data Menu:** Get External Data > From Text/CSV
- > Select the CSV file > Import:
  - ◇ Comma delimiter.
  - ◇ Unicode (UTF-8).
- > Load.
- > Save Excel file.

## Examples – Keepsake ID:

- art0001
- aud0010
- pub0100
- pic1000.1
- pic1000.2
- obj0002.31
- obj0002.32
- vid0020
- txt0200

## Related Collections

I have donated items of historical value to professionally managed repositories, as described below. In future, I shall consider a clause reverting items to the family, should the institutions choose to ever deaccession them. As a practical consideration I'll limit the number of generations to which the reverter applies. All the items described below are available for viewing in person, with advance notice, or in some cases accessible on the internet.

### Acadia National Park

In 2019, I gave an oral history interview to Acadia National Park staff about my former position as Chief of Planning and Land Resources at the park. The audio recording and an interview transcript are archived in the park's collections at Bar Harbor, Maine. A copy of each is part of the Jacobson-Lindquist-Phillips Archives. It is my intent to donate a collection of picture postcard to the park archives. The images depict places within Acadia's 1988 legislated fee-acquisition boundary.

### Historic New England

The Society for the Preservation of New England Antiquities, a.k.a. Historic New England, holds items from my paternal ancestors that were among the belongings passed to me through my mother, Dorothy Helen Phillips (Jacobson). They are my great-grandmother's paisley 'wedding shawl,' my grandmother's silk pillowcase, my grandfather's account of his immigration to America from Sweden, and a small cotton cloth stamped with men and women singing and the Christmas greeting "Glad Yule" (c. 1930). I delivered the shawl to Historic New England's collection storage facility at Haverhill, Massachusetts, first, then the other items. (They are HNE record 2015.129.1 and 2015.129.2). Historic New England acknowledged the gifts in light of their effort to build their ability to "interpret the Swedish immigrant story in New England."<sup>1</sup>

My grandaunt, Augusta Ottilia "Guttie" Lindquist, left a note tucked in the folds of her mother's 'wedding shawl.' As deciphered by my mother, Guttie's scrawling script reads: "This (illegible) have belongs to Charlatta [Charlotta] Lindquist (illegible) (illegible) (illegible) married to Anders Johan Lindquist in Munkatarp [Munkatorp] Kungslerrlen(?) [Kungslena] Sweden April 30 1875. Bought in Jan. 1875 A S Beck Should shawl give(?) to either Yale or Historic Museum if accepted(?). Augusta Lindquist, 308 Whitney Ave., New Haven, Conn." I carried out Guttie's wish to have an institution care for the paisley shawl by donating it to Historic New England as an unconditional gift 26 October 2015.

In 1902 my grandfather, Carl Albin Jacobsson, emigrated from Sweden. He chronicled his journey, starting with departure at the Norberg, Västmanland, train station and ending with

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<sup>1</sup> Laura Johnson, Associate Curator, Historic New England, Haverhill, Massachusetts, to Bruce Jacobson, letter, 08 October 2015, acceptance of donation; privately held by Jacobson, Seal Cove, Maine.

arrival at a rooming house in Brooklyn, New York. I rediscovered the hand-written account as I began to methodically go through the items I had inherited through my mother. To ensure its immediate safety, I donated it to Historic New England 10 September 2015, along with a copy of an English translation that my mother had prepared with Victor Arvidson and my 2009 journal entry about my visit to Ellis Island (Ref. code MS029.002.005).

Later, I discovered that my mother had actually translated a handwritten original copy of our grandfather's account now in my brother's possession and that it differed slightly from the original copy I had donated. Subsequently I had my copy professionally translated to English and emailed the translation to the curator at Historic New England to accompany the document they hold.

I also donated to Historic New England a framed painting, on a silk pillowcase, of a swan. It was owned by Anna Vitalia Lindquist (Jacobson), my paternal grandmother and is inscribed with "Anna," and signed "Albinus Hasselgren, -05-." My brother Rick remembers it sitting on the living room couch at our grandparents' home at 21 Hawthorne Avenue, Hamden, Connecticut.<sup>1</sup> Johan Albin (Albinus) Hasselgren (20 March 1880–09 April 1916) was a Swedish-American artist who spent his last four years at a sanatorium at Westfield, Massachusetts.<sup>2</sup> I made the unconditional gift 26 October 2015 (Accession no. 2015.129.1).

### Maine State Library

The Maine State Library holds the following of my publications<sup>3</sup> in physical or in digital collections (<http://digitalmaine.com/>). I contributed all but *Tides of Change* to the library, during 2018 and 2019. (I don't know how the library obtained *Tides of Change*.)

- *Tides of Change: A Guide to the Harraseeket District of Freeport, Maine* (1985).
- *Storied Lands & Waters of the Allagash Wilderness Waterway: Interpretive Guide and Heritage Resource Assessment* (2018).
- "Allagash Wilderness Waterway Bibliography" (2018).
- "Allagash Wilderness Waterway Sample Lesson Plans" (2018).

Other libraries and archives in Maine also hold these and similar documents I've prepared, including for the National Park Service.

### Northeast Historic Film

On 02 October 2007, I made two gifts of home movies to Northeast Historic Film, a nonprofit archive that collects, preserves, and shares northern New England's moving image heritage. One group of film was presumably shot by my dad, primarily in Connecticut and

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<sup>1</sup> Carl Ridgeway "Rick" Jacobson, Troy, Maine, telephone interview by Bruce Edwin Jacobson, 29 October 2014; handwritten notes privately held by interviewer, Seal Cove, Maine, 2019.

<sup>2</sup> Wikimedia Foundation, "Albinus Hasselgren," at *Wikipedia, The Free Encyclopedia* ([https://en.wikipedia.org/wiki/Albinus\\_Hasselgren](https://en.wikipedia.org/wiki/Albinus_Hasselgren) : accessed 27 Oct 2014). A 19 April 2019 edit of the wiki changes some basic facts, but the above remains as stated.

<sup>3</sup> I either authored these documents or conceptualized them and then edited the writing of others.

New York, and features scenes of Christmas with my young cousins Lorraine and Renzie, sightseeing trips, and damage from a hurricane. The collection, named the Carl E. R. Jacobson Collection, consists of 8 reels of silent, black & white, 8 mm film, totaling approximately 200 feet (identifiers 2254.0001–2254.0008). I have a VHS videotape and a MP4 digital file of the movies, both of which are included in the Jacobson-Lindquist-Phillips Archives.

On 30 July 2019 I made an unconditional gift of a reel of 8 mm film (and its mailing package labelled, “Woodmont Rd. House Destroyed”) to the Carl E. R. Jacobson Collection (identifier 3032-0001). My brother and I agreed that since we had no way to view the movie, and that the subject was of broader interest, the donation was appropriate. The movie records the day in 1956 that contractors for the State of Connecticut bulldozed our house at Woodmont Road in Milford, Connecticut, to make way for the Connecticut Turnpike (now Interstate 95). The film was shot with a camera owned by Seth Winters either by him or Dorothy Helen Phillips (Jacobson), as remembered by my brother Rick who was present. In August, the archives made a MP4 digital file of the movie for the family’s use.

I made another donation to Northeast Historic Film of a box of home movies and editing equipment I bought at the Big Chicken Barn, an antique store. Those are the Bruce Jacobson Collection. The archives, with its three-story vault holding more than 10 million feet of film, is at Bucksport, Maine.

## University of Southern Maine

During the 1990s, I took part in the formation and then activities of a gay and lesbian social group based on Mount Desert Island, called Out on MDI (OOMDI). We met for potlucks, organized a conference at College of the Atlantic for questioning youth, and sponsored outings such as hiking in Acadia, marching in an early Gay Pride parade in Portland, and entering a float in the annual Bar Harbor Fourth of July parade. I shepherded the purchase of a commemorative wall tile for the new Mount Desert Island YMCA building as part of my participation, in 1996. The small rainbow trout tile is among a mosaic ‘school’ of ceramic fish tiles funded by YMCA donors. I am proud that our “Lesbian and Gay Community of MDI” wall tile is beside the drinking fountain, in prominent view.

On 05 March 2018, I donated a three-ring binder of material to the Lesbian, Gay, Bisexual, Transgender, Queer+ Collection, Jean Byers Sampson Center for Diversity in Maine, Special Collections, University of Southern Maine Libraries at Portland, Maine. The binder held OOMDI organizational meeting notes, newsletters, and photos of activities; information about the YMCA rainbow trout ceramic wall tile; and a *Bangor Daily News* article describing a Maine Speakout event at which I spoke.<sup>1</sup>

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<sup>1</sup> Catherine Ivey, “Speakout Centers on Living in Fear,” *Bangor (Maine) Daily News*, 02 February 1998, HTML edition, archived (<http://www.qrd.org/qrd/www/usa/maine/bdn-2.2.98.html> : accessed 24 February 2019).

My brother Rick also donated material to an archive at the University of Southern Maine. The 2022 gift of postcards to the Osher Map Library and Smith Education Center culminated his attempt over four decades to collect a postcard labeled “Main St.” or “Greetings From” for every town in Maine. If the town name or post office no longer existed at the time of his research, Rick attempted to correlate the location to a then present-day name in documentation accompanying the gift, using *The Length and Breadth of Maine* by Stanley Bearce Attwood as his guide. The exact number of postcards in the collection is not known, but nearly 500 are in ‘archival’ sleeves, arranged systematically in several notebooks.



Figure 7-3: Example postcards from the Jacobson Collection, Osher Map Library.

The Osher Library gratefully accepted the deed of gift in keeping with its collecting focus on Maine towns, including Maine postcards. The intent to keep “the collection together and accessible to the public”<sup>1</sup> was important to Rick in making the gift. Once accessioned and digitized at Osher’s in-house lab, the Jacobson Collection postcards will be added to more than 80,000 items available for inspection or for download at [www.oshermaps.org](http://www.oshermaps.org), or perhaps added to the USM Libraries Digital Commons platform, <https://digitalcommons.usm.maine.edu>.

A selection of the postcards accompanied a 2023 exhibit at the Osher Library’s gallery titled, *Maine on Display: 19th Century Wall Maps and Bird’s Eye Views*. “The great majority of

<sup>1</sup> Libby Bischof [[[elizabeth.bischof@maine.edu](mailto:elizabeth.bischof@maine.edu)]] to Bruce Jacobson, email, 15 February 2022, “Jacobson Maine-town postcard collection?;” privately held by Jacobson [[[results@brucejacobson.com](mailto:results@brucejacobson.com)]] Seal Cove, Maine.

these 3.5- by 5-inch postcards on display were produced in two distinct periods of postcard history—the ‘Post Card Period,’ 1902–1907, and ‘Divided Back Period,’ from 1907–1915.<sup>1</sup>

### **University of Massachusetts Boston**

During my tenure as staff at Boston Harbor Islands National Recreation Area I collected copies of newsletters and other public-facing documents about the new national park. Upon my departure, I donated the items to the Boston Harbor Islands Special Collection of the Joseph P. Healey Library’s University Archives & Special Collections at the University of Massachusetts Boston. The archive was established in 1981 as a repository to collect archival material in subject areas of interest to the university, as well as the records of the institution itself.

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<sup>1</sup> Osher Map Library and Smith Education Center, “Postcard Views of Maine at the Turn-of-the-Century,” exhibit label from *Maine on Display: 19th Century Wall Maps and Bird’s Eye Views*, July 18 through October 28, 2023 (University of Southern Maine, Portland, Miane).

## 8. SHARING FAMILY STORIES

It is my hope that others will benefit from my toils in family history. What's the use of writing it down if no one reads my work or of conserving family keepsakes if there's no way for others to enjoy or to learn from them? To safeguard and share family-related material, I organize the items in my possession and find repositories for those with value beyond the immediate family. *See* chapter 7: "Family Keepsakes."

By following the guidance within this manual, I hope to share my work with genealogists, who will find my research reliable and useful. I would like to donate my genealogy database and supporting documentation to an archive, such as at the New England Historic Genealogical Society, for distribution, safe-keeping, and wider use. More importantly, I intend to craft short, image-rich life stories to engage others with what I've learned about my relatives.

### Telling Stories

The primary way to share my writing is through history vignettes for family consumption (once I've collected enough verified information to support my narratives). For the time being, I share those stories at [brucejacobson.me](http://brucejacobson.me), in the category Family History. Perhaps it will make sense to collect them one day into larger memoir-style biographies, i.e., narratives about important periods in an individual's or family's life story. Joan Ferris Curran states well in the following excerpt my approach to telling family stories: it's not just about the facts.

While the facts will provide the backbone of your text, your job is to provide the flesh and blood—to make these people interesting to the reader. Tell about the formative period of a person's life. Far too many family histories are written by older adults for older adults, and youth is forgotten. Be sure to include pictures, but if you don't have any, give some sort of physical description. A single word—*tall, lanky, portly*—will provide a mental image. And be sure to give something of the essence of the individual. Speaking about his grandfather, a friend said he was the sort of man in whose presence one backed out of the room. That one sentence says so much!

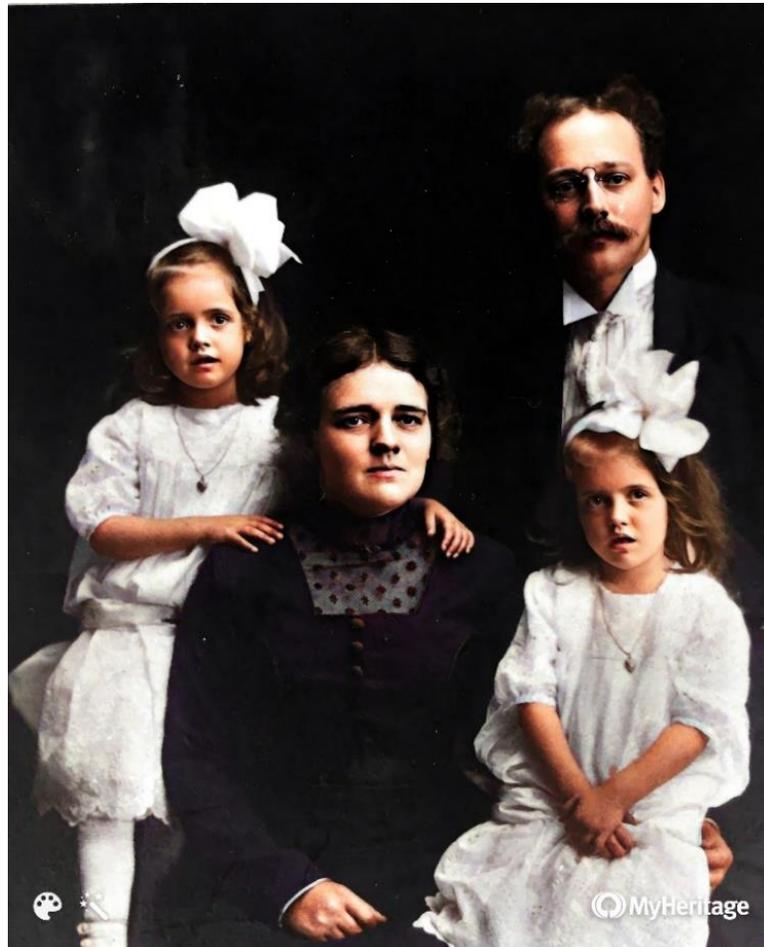
Tell about where the family lived—not just the name of the town but something about the town, its people, what it was like living there. And remember, going back in time is like entering a foreign country. Provide some historical orientation. Was this a time of war? Depression? Epidemic? How did these events affect your family? Include the elements of struggle—the challenges and problems of daily life.<sup>1</sup>

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<sup>1</sup> Joan Ferris Curran, *Family History: A Legacy for Your Grandchildren*, Third Edition, Revised (Boston: New England Historic Genealogical Society, 1996), p. 13.

## Photos Tell a Story

Photos are important sources of family information. While they might be used to illustrate narrative text, photos can also tell a visual story on their own. The placement of individuals in a group photo might reveal positions of power or respect. The arrangement of items in a photo album or scrapbook represents deliberate choices made by the person who created it about which items to include and their order of presentation. Taking apart album pages destroys their created story, and destroys the context for each item, whether it be an image, news clipping, card, or other memento. I select images deliberately for use in family history, ones that enhance story telling. In general, that means choosing clear photos of individuals, families, and the places associated with their lives. I document each image within its context, such as when part of a scrapbook.



*Figure 8-1: Colorized photo of Carl Albin Jacobsson, Anna Vitalia Lindquist, with twin daughters Gladys Olga Vitalia Jacobson and Lillian Alice Viola Jacobson (n.d.).*

## Other Visual Tools

I, as storyteller, have more than narrative text and photos as tools with which to share family history. Among them, drawings and illustrations may play a part. A family chart, such as that shown in Figure 8-3, helps readers visualize familial connections. Other visuals might shed light on details that make communicating about an ancestor's life simpler. The image of the ad in Figure 8-2 says so much more than simply stating that my grandfather Carl Albin Jacobsson (Jacobson) managed a photo studio in Worcester. Maps, too, can be powerful visual tools that correlate places with an individual or family, and their activities. *See* Mapping Family Places section, chapter 4.



Figure 8-2: Anderson Studio advertisement from Scandinavia. (18 July 1906, p. 18)

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### Story resources:

- ▶ “Watch our FREE lessons” by Carol Baxter:  
<https://www.writingfabulousfamilyhistories.com>
- ▶ “Write, Design, and Publish Your Family History Book” by Clémence Scouten:  
<https://www.coursesbycaroline.com/courses/enrolled/1619883>
- ▶ “Productive Habits: Writing a Narrative / Research Report” by Caroline Guntur:  
Appendix I and <https://www.coursesbycaroline.com/courses/1171755/lectures/29713792>
- ▶ “Illustrating Your Family History” by Caroline Guntur:  
<https://www.coursesbycaroline.com/courses/1171755/lectures/33010474>

## Who is the Focus?

I established in chapter 1 that I am using an inclusive definition of ‘family.’ Yet I can’t include every story about every individual to whom I’m related. Andrew Lee and Devon Noel Lee are among family historians who identify alternative ways to approach family history. I expect to use several of the following approaches they have delineated when telling my family’s stories.

- 1) **Individuals** – the focus is on a single person. Think of this as a biography. It could also be a collection of ‘sayings’ or stories from that particular person. Include additional family members’ stories as they intersect with the focal individual.
- 2) **Families** – the focus is on a family. A family project would involve all of the members of a single family and includes events in which that [sic] everyone participated. Events involving a single individual may appear to detail what that [sic] each family member was doing in the overall family story.
- 3) **Superfamilies** – the focus is on a few generations of related families in a particular geographic area. The location may have had many intermarriages so you could end up with one superfamily. Many early county histories end up being superfamilies.
- 4) **Ancestors** – the project selects a starting person and climbs the family tree into the past several generations. Keep in mind, the more generations included, the more daunting the task.
- 5) **Descendants** – the project selects a person or couple and records family stories as you progress forward in time through their children, grandchildren, and so on.<sup>1</sup>

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<sup>1</sup> Andrew Lee and Devon Noel Lee, *Pass Your History On* (FHF Group LLC), Kindle Edition. Permission granted for personal enjoyment.

## Writing with Style

I have choices to make about grammar, punctuation, and the myriad other elements of crafting thoughts into sentences—all of which are in addition to the rules about recording and citing genealogical information presented in the preceding chapters. This section presents more general stylistic guidelines that inform my writing about family history (including this manual).

I distilled the styles from generally accepted rules combined with my own house-style decisions. Many of my choices have been informed by collaboration with copyeditor Jane Crosen. A list of sometimes problematic words can be found in Appendix A. *The Chicago Manual of Style*, and Kate Turabian's *A Manual for Writers*, both published by the University of Chicago Press, are the foundation for my narrative style choices. Mills' guidance from *Evidence Explained* also helps me make formatting choices.

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### Using general house styles:

- Use short, simple, easy-to-understand words and sentences.
- Be concise; avoid wordy phrases.

#### Capitalization

- Lowercase style preferred; where it is likely a statement or fact will be misunderstood or misread; capitalization acceptable.
  - ◇ CMOS 'down' style for all common names of plants, animals, trees and plants, etc. (except for proper names: European hare)
  - ◇ lowercase two-word short titles that could apply in general to a number of organizations (e.g., steering committee; task force; working group; regional office)
- Initial caps for proper nouns including titles of books, reports, chapters, etc.:
  - ◇ specific organizational titles; capitalize two-or-more-word short titles when they are descriptive of a single specified function or organization (e.g., National Park Service; Park Service)
  - ◇ course and workshop titles.

#### Punctuation and Spacing

- Use serial comma throughout (e.g., the Brown, Pratt, Nelson, and King families).
- Close up spaces around EN dashes, unless used in place of colon.
- Double 'smart' quotation marks (no italics) are for:
  - ◇ direct quotes with fewer than 40 words; use ellipse plus period after complete sentence in quoted material
  - ◇ individuals' nicknames, first occurrence
  - ◇ web pages, blogs, and online indexes
  - ◇ individual lectures, speeches
  - ◇ podcasts, individual videos
  - ◇ short poems
  - ◇ short stories
  - ◇ single TV episodes

- ◇ songs
- ◇ articles and papers
- Double quotation 'straight' marks indicate inches in measurements.
- Single quotation marks (apostrophes):
  - ◇ draw attention to a word;
  - ◇ indicate unusual use of a word; or
  - ◇ provide distance from a word (British English norm, but contrary to CMOS format.)<sup>1</sup>
- Editorial square brackets enclose:
  - ◇ language translation
  - ◇ corrections, clarifications, words added (i.e., not found in original quoted material), etc.
  - ◇ parenthetical statement within parenthesis
  - ◇ an aside
  - ◇ author of an online forum post; real name of author first, if known<sup>2</sup>
- Use comma after 'e.g.,' 'i.e.,' (except listed in series in running text).
- Place period at end of last item in bullet list if it completes introductory sentence; otherwise, no period.

#### Typography and Word Choice

- Add word space between two initials in personal or business name, but not abbreviations like U.S.
- Spell out 'and' in titles and figure references; no ampersands (&).
- Figure captions are descriptive and end with a period, followed by source info if any without period.
- Table captions are treated as titles with initial caps and no period.
- **Bold** adds emphasis to a word.
- Italics used for:
  - ◇ non-English words
  - ◇ vessel names (but not initialism indicating type of vessel; e.g., USS)
    - double quotes (" ") if text formatting not available
  - ◇ works of art and art exhibitions
  - ◇ parts of a published work
    - chapter in a book
    - blog names, podcast series
  - ◇ concerts, movies, plays
  - ◇ law cases
  - ◇ long poems
  - ◇ magazines, journals, newspapers
  - ◇ radio and television shows
  - ◇ record albums/CDs.

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<sup>1</sup> Collins, "When do you use quotation marks (' ') or (" ") in English?" at *Collins English Dictionary* (<https://grammar.collinsdictionary.com/us/easy-learning/when-do-you-use-quotation-marks-or-in-english> : accessed 20 July 2023).

<sup>2</sup> American Psychological Association, "Online Forum (e.g., Reddit) References" at APA Style (<https://apastyle.apa.org/style-grammar-guidelines/references/examples/online-forum-references> : accessed 18 November 2023).

- Enclose words with HTML if italics formatting not an option (e.g., <i>italicized word</i>)
- Identify lists within sentences with lowercase letters and parentheses, as follows: (a) the first point, (b) the second point, (c) a third one, and (d) the final one.
- Small caps for postnominals after a name and for acronyms and initialisms.<sup>1</sup>

**Formatting text styles, this manual:**

- Heading 1 – Calibri (Body), 22 pt, #C45911
  - ◇ chapter headings, odd page, no indent first paragraph
- Heading 2 – Calibri (Body), 16 pt, #C45911
  - ◇ page break before
- Heading 3 – Calibri (Body), Bold, 12.5 pt, #0D0D0D
- Heading 4 – Calibri Light (Heading), 12 pt, #000000
- Heading 5 – Calibri (Body), Bold, 11.5 pt, #833C0B
  - ◇ actions, examples, and resources
- Heading 6 – Calibri Light (Heading), 10.5 pt, #262626
  - ◇ sub-head of Heading 4 and Heading 5
- Menu Icon > \_appName > non-breaking spaces > Outside Border
- {\_nospace} – no spacing after paragraph
- small caps, 10 pt > FAMILY HISTORIAN RECORD
- underline, words only > Property Box: or Focus Window
- {\_appName} > software brand name
- {\_appMenu} > **menu** or **tab**
- {\_appField} > software field
- {\_filename} > file name or [file folder](#) (add color if applicable)
- {fh7} > FH7
- {\_table text} >
 

table text	rutrum tellus pellentesque	quis enim lobortis
lorem ipsumquam adipiscing	proin fermentum	eiusmod elementum
- {\_quote - block} >
 

Block quote. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Rutrum tellus pellentesque eu. Lorem mollis aliquam ut porttitor leo.

Scelerisque felis imperdiet proin fermentum. Tempus imperdiet nulla malesuada pellentesque elit eget gravida cum. Quis enim lobortis scelerisque fermentum dui faucibus in ornare.
- {definition} and {\_definition: word} (#C45911) >

---

**sample word** – Definition quis enim lobortis scelerisque dui faucibus in ornare elementum nisi quis eleifend quam adipiscing.

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<sup>1</sup> Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, Kindle Edition (Baltimore, MD: Genealogical Publishing Co., 2017), 2.61, p. 76.

Writing resources:

- ▶ Appendix I: Genealogy Reporting and Writing Guides.

## Sharing with Family Historian

I have only begun to explore ways that information can be organized, retrieved, and presented in Family Historian to help share family stories. They include standard and customized reports, query reports, named lists, websites, GEDCOM file exports, and more. Reporting for specific Family Historian facts is considered in preceding chapters. Here, I present more general ways that FH7 can share biographical information.

I've modified the content and layout for the variety of reports and queries I use and have saved them with a leading underscore (" \_ "). Data marked private is not displayed in most reports. The best way to retrieve information is to start in the Family Historian toolbar with the *Publishing Tools Finder* under the dropdown **Publish Menu** . Only *All Reports* and *All Queries (Lists and Tables)* displays my custom reports.

### Pedigree Charts/Family Trees

A pedigree chart—a.k.a. ancestor chart or family tree chart—displays a person's ancestry visually in various formats. Figure 8-3 is a preliminary pedigree chart for my family generated in Family Historian, using a fan format. It employs the color coding for family lines I described in chapter 5: "Document Management and Storage." Family Historian calls family trees 'diagrams' and also 'charts.'

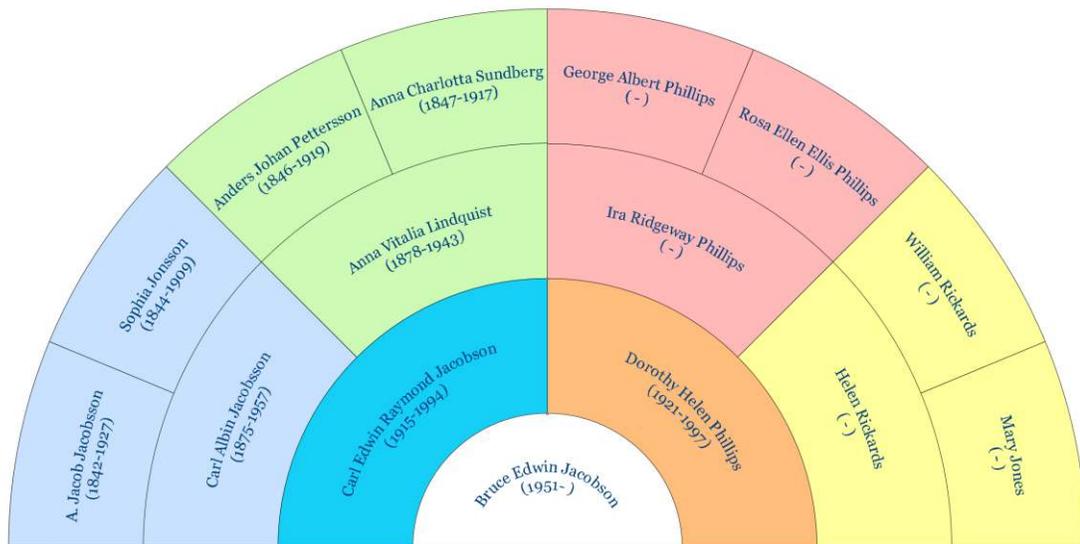


Figure 8-3: Fan Chart Example

### Vector Files

FH7 charts can be saved as a vector files, rather than more conventional raster files such as JPEGs, TIFFs, or PNGs. Using vector files allows the chart image to always display at full resolution, no matter how much it is scaled. The difference between vector and raster files is

vector files are images that are built by mathematical formulas that establish points on a grid. Raster files are composed of the colored blocks commonly referred to as pixels. Because they can infinitely adjust in size without losing resolution, vector files are more versatile for certain types of tasks than raster files. The most common types of vector files are:

- .AI – Short for Adobe Illustrator, this file is commonly used in print media and digital graphics, such as logos.
- .EPS – Encapsulated PostScript is an older type of vector graphics file....
- .PDF – The Portable Document Format is built for the exchange of documents across platforms....
- .SVG – The Scalable Vector Graphics format is based in XML (a markup language used widely across the Internet that's readable by both machines and humans). It's useful for the web, where it can be indexed, searched, and scripted.<sup>1</sup>

MSWord supports vector graphics files using a Windows format called Enhanced Metafile (EMF). In Word, insert the chart vector exactly as you would any other image format.<sup>2</sup>

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#### Exporting charts as vector files:

- Generate the required diagram/chart in FH7.
- **Diagram menu** (main toolbar) > Save Diagram As...
  - > Enhanced Metafile (emf)
  - > Select options > Save

#### Adding twins to charts:

Adding the following Box Condition Expression customizes diagrams/charts to automatically add a **Twins** icon when appropriate. Thereafter, in their Property Box on the **All Tab** that Twin flag will be shown.

- **Charts** in main toolbar and create a diagram for any individual or couple. > **Diagram menu**: Diagram Options... (or right-click background). > **Boxes Tab**: Add Condition > Expression.
  - > add expression:
 

```
=IsTrue( (Diff( DayNumber( %INDI.BIRT.DATE% ), DayNumber( Field( NextSib( %INDI% ), 'INDI.BIRT.DATE' ) ) ) < 2 ) Or ( Diff( DayNumber( %INDI.BIRT.DATE% ), DayNumber( Field( PrevSib( %INDI% ), 'INDI.BIRT.DATE' ) ) ) < 2 ) )
```

---

<sup>1</sup> Adobe, "What is a vector file and how to use them" at *Adobe: Creative Cloud* (<https://www.adobe.com/creativecloud/design/discover/vector-file.html> : accessed 27 Mar 2024).

<sup>2</sup> [Mark1834], "Re: Importing charts into a word document" at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?p=145630&sid=afae10c8c69bea4549101878c03c6b9e#p145630> : posted 22 Mar 2024; accessed 27 Mar 2024).

Note that the expression must all be on one line, so first copy and paste to say Notepad and remove any line breaks, then copy and paste to `Expression` field. Allowing a day difference in dates accommodates twins born over midnight.<sup>1</sup>

> Box Features > set icon called 'organization': 

## Family Group Sheet and Individual Summary Report

A family group sheet includes information from civil and church records for immediate family members. Typically, it lists the father and mother at the top followed by the names of their children. Family Historian offers options (`More options...`) to set the level of detail when producing family group sheets. An individual with more than one spouse will be shown on more than one group sheet. Family group sheets can include sources for all facts and a bibliography when created in Family Historian.

Individual summary reports—similar to family group sheets—can be generated in Family Historian for every individual entered in the app, which can include sources and a bibliography. I find individual timelines more useful.

## Individual's Timeline

Timelines are an efficient way to get a sense of the notable events in a person's life. In FH7 timelines show not only an individual's own facts, but also events and attribute of their close relatives. For instance, the death of a parent or birth of a child. I can choose which facts to include in the Select Facts dialogue.

FH7 offers a couple of ways to produce timelines, either as reports or queries, and I prefer the latter because of their simpler format. Timeline query results list various facts (events and attributes) that are relevant to the life of the person selected. The set of facts listed is determined by the settings configured in the **General tab** of Preferences; any facts flagged as 'Rejected' are excluded. Export of query results can be saved as an Excel spreadsheet and then printed. I favor a custom query that I created: `_Individual Timeline by Year (Custom)`.

## Outline Descendants/Ancestors Report

This report is a good way to summarize members of a family by generation in an outline format that can be saved as a PDF. It is pretty customizable.

## Narrative Reports

Family Historian has three standard reports that attempt to describe a person's life using sentences composed from the facts recorded about them. Any fact (event or attribute) in which the individual figures as either a 'principal' or a 'witness' is included. The report narrative is generated from sentence templates, which results in awkward phrasing and repetition. (Soon,

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<sup>1</sup> Mike Tate [tatewise], "Twin Icon for Diagrams" at *Family Historian User Group – Forum* (<https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=15968&p=85950#p85950> : posted 04 June 2018; accessed 11 November 2022).

I'm sure genealogy apps will start using AI to generate narratives.) The standard FH7 narrative reports are Descendants by Generation, Ancestors by Generation, and Individual Narrative. The software's printed guide recaps narrative reports as follows.

- You can add a principal as a witness to their own fact, and you can add anyone (witness or principal) more than once as a witness to any fact. But however many times a person has been added as witness to a fact, there will only ever be one sentence generated for that fact, in narrative reports about them. If they are a principal, the generated sentence will be a *principal* sentence, based on their first occurrence as a witness to the event. If not, the sentence generated will be a *witness* sentence, based on their first occurrence as a witness to an event.
- Both principal sentences and witness sentences are generated from *sentence templates*, which are part of the *fact definition* for each fact type.
- You can preview and override sentences in the **Sentence** field at the bottom of the Facts tab, and (for witnesses) at the bottom of the Witness Window.<sup>1</sup>

## GEDCOM Export

A GEDCOM file is the standard way to share data among genealogy software applications. A Family Historian user was dissatisfied with FH7'S GEDCOM export function, so he created a plugin. Among other tasks, "the plugin eliminates FH GEDCOM Extension List custom tags, adheres to GEDCOM Standard Release 5.5 and 5.5.1 excluding non-standard tags, and introduces custom tags for some destination product dialects. Multimedia files can be converted into various styles or removed entirely."<sup>2</sup> The Export Gedcom plugin's export settings allow customization for several commercial genealogical applications. I have tried the following plugin settings for export to my Gedview app:

- (Str) Standard GEDCOM Release 5.5.1 – 27 March 2024
  - all sources listed for events.
  - lists sources arranged by long title, which groups all with quotation marks, italics marks, etc. which was confusing at first, but that is what I intended: critical information about the source is displayed in the long title.

---

### Exporting GEDCOM file, Export Gedcom File plugin:

- Before running Export Gedcom File plugin, the creator advises these tasks be performed in FH7:
  - ◇ **File Menu:** Validate to detect & correct GEDCOM structural errors
  - ◇ **Tools Menu:** Uncategorized Data or Tools > Plugins > UDF List to list & fix UDF

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<sup>1</sup> Simon Orde, *Getting the Most from Family Historian6* (London: Calico Pie Limited, 2016) p. 172.

<sup>2</sup> Mike Tate, "Export Gedcom File" at *Family Historian7 Plugin Store* (<https://pluginstore.family-historian.co.uk/page/help/export-gedcom-file> : accessed 01 November 2022).

- ◇ **Tools Menu:** External File Links to detect and repair broken Media links
- ◇ **Tools Menu:** Plugins > Check for Unlinked Media to reveal orphaned Media
- ◇ **Tools Menu:** Plugins > Show Project Statistics to find invalid dates and other snags.
- Export a subset of FH7 RECORDS:
  - > **File Menu:** Import/Export > Export > GEDCOM File
  - > select a subset of INDIVIDUAL RECORDS
  - > ensure the Exclude options are all unticked except Unconnected Records and review the other options
  - > Usually Destination: Default, Format: UTF-8, and MEDIA RECORDS: Use Full File Paths will work well.
  - > after saving it in the Public folder, open the standalone GEDCOM file in FH.
  - > launch Export Gedcom File plugin from FH7 **Tools Menu**.
- Set Export Gedcom File plugin
  - > Select GEDCOM Destination (I've tried the following):
    - ◇ (Str) Standard GEDCOM Release 5.5.1 – As of 2023, 5.5.1 is the version used by GedView.
    - ◇ (Std) Standard GEDCOM Release 5.5 – Okay.
  - > Select [[private]] Text Options > (Exclude)
- Run Export Gedcom File plugin.

## Publishing with BookWright and Blurb

I use the BookWright design app and Blurb online publishing platform, described in chapter 2, on the recommendation of Clémence Scouten who led a three-part course on creating a family history book. Among her suggestions:

- Playfair Display Extra-Bold – heads (Google Font only offers semi-bold))
- Source Sans Regular – text (not found in Blurb list of compatible fonts)
- landscape 10" x 8" standard format is good
- print book, then link to an e-version or also buy a PDF for upload to web.

I heeded the following advice because it took a long time for me to learn the spelling of the Swedish word *län* due to the similarity between a lowercase ‘l’ and an uppercase ‘L’ in the Palatino Linotype font I’m using for this manual. She cautions, “when selecting a typeface—especially a sans serif—it’s useful to assess the similarities between the uppercase ‘L’, lowercase ‘l’, and numeral ‘1’ characters.”<sup>1</sup>

Blurb imports RichTextFormat files, which can be created in MSWord (‘save as’). I’ve downloaded fonts, as shown in Table 8-1 (*see* next page) to Word on my laptop app so I can compose text with Blurb-compatible fonts ([www.blurb.com/ebook-fonts](http://www.blurb.com/ebook-fonts)) for design placement in BookWright.

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### Publishing resources:

- ▶ “Write, Design, and Publish Your Family History Book” by Clémence Scouten: <https://www.coursesbycaroline.com/courses/enrolled/1619883>
- ▶ Storyworth – hard-cover books created using question prompts delivered via email: <https://welcome.storyworth.com/>
- ▶ Remento – recorded memories become written stories using question prompts delivered via email: <https://www.remento.co/>

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<sup>1</sup> Elliot Jay Stocks, “Choosing Reliable Typefaces” at *Google Fonts* ([https://fonts.google.com/knowledge/choosing\\_type/choosing\\_reliable\\_typefaces](https://fonts.google.com/knowledge/choosing_type/choosing_reliable_typefaces) : accessed 12 September 2023).

Table 8-1: My MSWord Fonts Compatible with Blurb Publishing

GOOGLE		OTHER	
<b>Abril Fatface 11 pt. Word font.</b>	Yes	ITC American Typewriter™	
Advent Pro		Typewriter™ Condensed	
Alegreya		<b>Arial® 11 pt. Word font.</b>	Yes
Amaranth		<b>Avenir® 11 pt. Word font.</b>	Yes
<b>Arvo 11 pt. Word font. (4 styles)</b>	Yes	Calvert®	
Crimsontext		Monotype® Century™ Schoolbook	
Dosis 11 pt. Word font.	Yes	Courier New 11 pt. Word	Yes
Droid Serif		Linotype® Didot	
Economica 11 pt. Word font. (4 styles)	Yes	English Script	
Exo 11 pt. Word font. (2 styles)	Yes	Futura®	
<b>Francois One 11 pt. Word font.</b>	Yes	<b>Georgia® 11 pt. Word font.</b>	Yes
<b>Jockey One 11 pt. Word font.</b>	Yes	Neue Helvetica®	
Josefin Slab 11 pt. Word font. (2 styles)	Yes	Neue Helvetica® Condensed	
Josefin Sans 11 pt. Word font. (2 styles)	Yes	ITC Dartangnon®	
Jura		Museo	
<b>Lato 11 pt. Word font. (10 styles)</b>		Museo Sans	
<b>Lora semi-bold 11 pt. (2 styles)</b>	Yes	Proxima™ Nova	
Marvel 11 pt. Word font. (4 styles)	Yes	Snell Roundhand®	
<b>Maven Pro 11 pt. Word font.</b>	Yes	Stempel Garamond™	
Neutron		ITC Stone® Humanist	
Open Sans		<b>Times New Roman® 11 pt. Word font</b>	Yes
<b>Oxygen 11 pt. Word font. (3 styles)</b>	Yes	<b>Trebuchet™ 11 pt. Word font.</b>	Yes
<b>Playfair Display Semibold 11 pt. (2)</b>	Yes	<b>Verdana® 11 pt. Word font.</b>	Yes
<b>PT Sans 11 pt. Word font. (4 styles)</b>	Yes	<b>ITC Zemke Hand™ 11 pt. Word font.</b>	Yes
Quicksand 11 pt. Word font.	Yes		
Rambia			
Roboto			
<b>Raleway 11 pt. Word font.</b>	Yes		
Titillium Web			
Ubuntu			
Volikorn			

## Sharing with brucejacobson.me

I created brucejacobson.me (<https://brucejacobson.me/>) to share information about my work, play, and family history. It's a mix between a blog and a personal website, which I administer as a managed WordPress site through GoDaddy.com. WordPress comes with two content formats: posts and pages.

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**blog post** – a blog post typically covers a specific topic or query, is educational in nature, ranges from 600 to 2,000+ words, and contains other media types such as images, videos, infographics, and interactive charts.<sup>1</sup>

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I use both posts and static pages to offer content in five topical headings: Spaces & Places, With Friends, Work Life, Family History, and Vacation Rental. Family History contains:

- **Family Stories** – vignettes about my immediate Jacobson+Phillips family (<https://brucejacobson.me/tag/sn-jacobsonphillips-family/>), and about my grandparents and their relatives:
  - Jacobson (.../tag/sn-jacobson/),
  - Lindquist (.../tag/sn-lindquist/),
  - Phillips (.../tag/sn-phillips/)
  - Rickards (.../tag/sn-rickards/).
- **My Family's Names** – biographical facts (.../my-family-names/) about individuals in my extended family, such as birth and death dates, marriages, children, etc.; utilizes the Gedshow WordPress plugin.
- **My Family History Manual** – a copy of this document (.../manual/) for viewing and download.

### Family Stories as PDFs

I like the formatting I've developed for my Family Stories blog posts and have searched for a way to present them in other formats. I finally figured it out: take a screenshot using FireShot and save it as a paginated 8.5 x 11-inch PDF. I select the primary content area that tells the story of the post, eliminating navigation menus and other extraneous elements. The selection width is always 800 pixels and length is as needed to capture the story content..

---

#### Saving Family Stories as PDFs, FireShot

- WordPress Dashboard: Settings > Media
  - > Image Size Max Width = 800 px
  - Return image size to 1200 pixels when screenshot/PDFs complete.
- Open URL in Chrome browser: Reset browser width to 100% (*see* Figure 8-4)

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<sup>1</sup> Rachel Leist, "How to Write a Blog Post: A Step-by-Step Guide" at Hubspot.com (<https://blog.hubspot.com/marketing/how-to-start-a-blog> : updated 15 September 2023; accessed 16 November 2023).

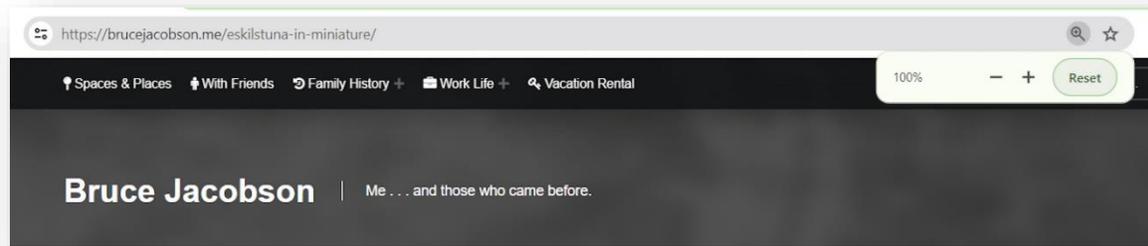


Figure 8-4: Chrome browser width Reset to 100%.

- Launch FireShot extension.
  - > Capture selection/element and... > Save as PDF.
  - > Left-click top left edge of featured image .
  - > Hold and drag to 800 px (right edge of image) and then down to story's end.
  - > Export to PDF Window: Tick the following choices:
    - ◇ split long screenshots to pages.
    - ◇ enable smart page breaks.
    - ◇ create text – selectable and searchable PDF.
    - ◇ enable web links
    - ◇ enable header and footer (*see* settings, Figure 8-5)
  - > Page Size: > Custom Width and Height...
    - ◇ width: 8.5 inches
    - ◇ height: 11 inches
  - > OK > name and save file as PDF/A format.

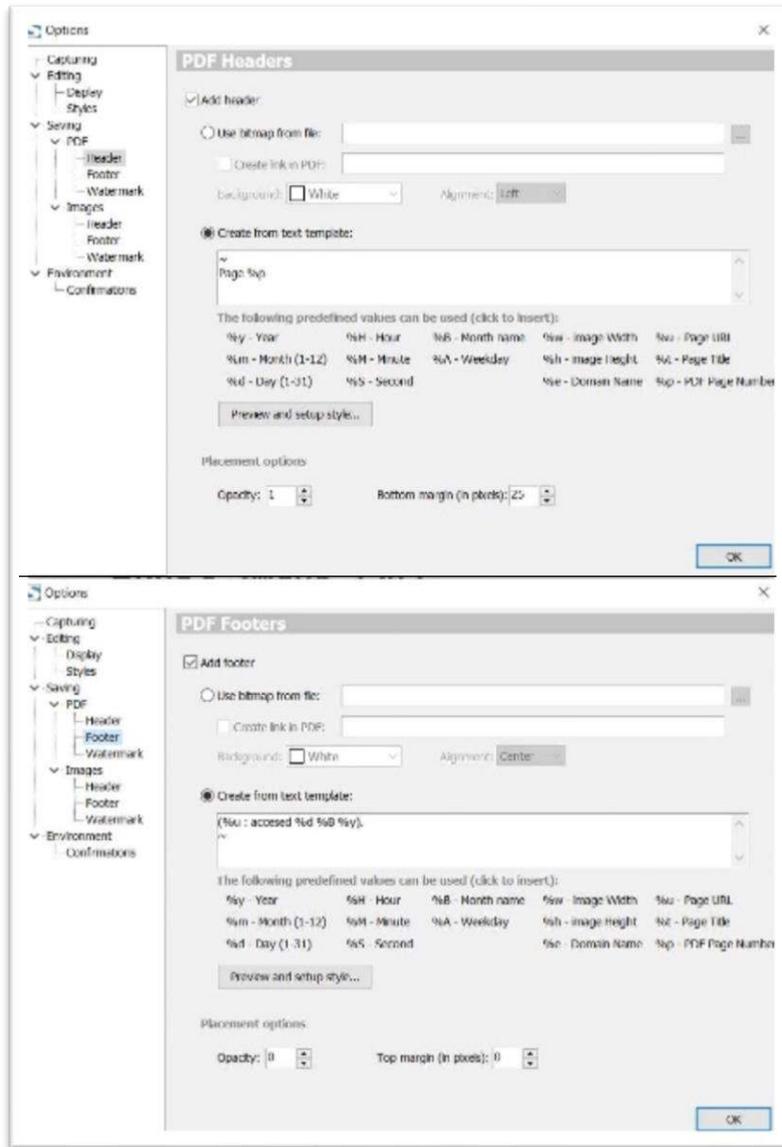


Figure 8-5: FireShot header and footer settings.

# APPENDICES

(separate binder)

## A: Glossaries and Word Lists

### 1. Style Sheet Word List

compiled by Jane Crosen and Bruce Jacobson

### 2. Swedish Genealogical Dictionary

by Phyllis J. Bladsen and Joseph C. Huber

### 3. Så Stavar du Namnen: Släktforskarförbundets namnlista

[How to Spell Names: The name list of the Association of Genealogists]

by Håkan Skogsjö

## B: Geography and Jurisdictions

### 1. Swedish Historical Maps & Online Map Collections

by Bob Johnson, NordicFamilyHistory.com

### 2. Swedish Civil Jurisdictions for Family History (1630–1900)

based upon *Hur riket styrdes: Förvaltning politik ock arkiv 1520–1920* by Björn Asker

### 3. Sweden: Official Standard Names

by U.S. Board on Geographic Names

### 4. My Family Placenames

by Bruce Jacobson

## C: Family History Software Guidance

### 1. FH7 Historian Data Model

by Colevalleygirl@colevalleygirl.co.uk

### 2. FH7 Custom Source Templates

compiled by Bruce Jacobson

### 3. ArkivDigital User Guide

by ArkivDigital

## D: Genealogy Standards

### 1. GEDCOM 5.5.5 Tag Definitions

by Tamura Jones

### 2. Standards for Name Date & Place

by Gary Mokotoff

### 3. Getting It Right: Data Entry Standards for Genealogists

by Judith Schaefer Phelps

## E: Scanner Operation

### 1. Edited Epson Manual

### 2. The User Guide For Digital Ice3™ Technology

### 3. Epson Perfection V600 Scanner Manual

### 4. Choosing PPI When Scanning

by George Soules

## F: Genealogy Research Aids

### 1. Using and Managing a Genealogy Research Log

by Thomas MacEntee, High-Definition Genealogy

### 2. Source Type Descriptions

by FamilySearch

### 3. Using Facial Recognition

by Caroline Guntur

### 4. Dissection and Analysis of Research Problems

by Elizabeth Shown Mills from webinars sponsored by Family Tree

### 5. History of U.S. Census Agency

by United States Census Bureau

## G: Swedish Genealogy Tips

### 1. Basics of Swedish Research

by Kathy Meade, ArkivDigital

## **2. Lutheran Church Record Codes**

compiled by Bruce Jacobson

## **3. Parish Register Examples, Sweden**

by Family History Library, Church of Jesus Christ of Latter-Day Saints

## **4. Using Swedish Taxation Records To Solve Tough Genealogical Problems**

by Jill Morelli, CG®, CGL (A PDF handout for the presentation at [https://www.youtube.com/watch?v=6i\\_tQUt4PAc](https://www.youtube.com/watch?v=6i_tQUt4PAc) )

## **5. Swedish Naming Practices in Earlier Times**

by Hans Högman

## **6. Researching Military Conscription – Sweden**

by Hans Högman

## **7. Military Allotment System – Sweden**

by Hans Högman

# H: Family History Travel Tips

## **1. How to Travel Trouble-free and Absorb Your (Swedish) History**

by Jan Carlson. (A PDF outline for the presentation at <https://youtu.be/X3p8e2DD1Fo> )

# I: Genealogy Reporting and Writing Guides

## **1. Genealogy Report Template: Simplified SOSA System**

by Caroline Guntur

## **2. Microsoft Word Template for Register Style**

by New England Historic Genealogical Society

## **3. Editing an Oral History Transcript**

by Minnesota Historical Society