

# Genealogy Basics – Personal Preferences

By Joe Petrie

My personal preferences apply only to my own database. Some preferences were workarounds necessitated by the choice of my first genealogy software in the 1980s. I learned fairly quickly that the software's lack of features was to help me to define features for the replacement software that followed. I selected that first software because it came highly recommended by a dear friend who was using it. Let's face it; I simply did not know a lot about either genealogy software or even about genealogy. I learned by experience that there was no Notes nor GEDCOM. There was no Register Report. I had inputted over 6000 records when I decided to make the change. Loading the new software's database was a chore. All 6000 records and marriage records had to be entered anew. More importantly, attributions (sources) had to be entered in Notes.

My personal preferences are:

1. For ancestors and relatives with children where the children use the mother's surname, I create a father record with the same last name as the children's last name – even in the very rare case where I know the father's real and different surname. Why? For those situations, my first genealogy software automatically identified an unknown parent as **UNKNOWN** including in reports. I was appalled. Essentially, the software forced me to create a record for the unknown party to eliminate the offensive **UNKNOWN**. (After I changed my genealogy software, I continued the practice because I was comfortable.)
2. For relatives that have children but “look like” and probably never married, I record the couple as being married, i.e., I create a marriage record. Why? They may in fact be married but I simply could not find a record. Or the female may have decided to keep her Maiden Name.
3. I do not record Divorces or Annulments. Why? In my genealogy software, there is no way to identify an annulment. I simply do not know the circumstances and prefer that the couple have their privacy. I extend my preference to all couples who have remarried after a death, divorce or annulment as well as those who are living together.
4. I do not identify adopted family members. Some of these individuals never know that they were adopted until they are adults. In prior centuries, they never needed to know. Why don't I record someone as being adopted? I surmise that at a very early age I was told that my father had an adopted sister. Years later, she and Dad found out that she was never officially adopted. During tough times in Ontario, Dad tried to sponsor her family's immigration into the USA. He was frustrated because he needed an official adoption record. He was so angry at his deceased parents' failure to adopt or at the loss of the paperwork in the court system that his angst showed. I think that it was the only time in my life that Dad showed his sons any anger. We were blessed by that!
5. In the software's Notes, I usually record a source – except when the source is an obituary for a deceased relative and the new record is for a survivor or a survivor's spouse. I copy the obituary into the software's Notes for the deceased. When I create records for survivors, I don't write in the record that the source is an obituary. Please note that attribution is the most important item in the Notes. Recently, a cousin wrote to tell me that I did not attribute something that she had provided. Further research looks like another cousin provided the records to her after deleting all the sources in the Notes.

6. In the software's Notes, for information that I get from individuals, I do not distinguish between oral or written sources. Most of the sources are written. Why? It is a shortcut because I do not type very fast. I always assume that I have a paper audit trail in my file cabinets.
7. In the software's Notes, many of my records have obituaries. Sometimes in obituaries, where I can't identify a married woman's maiden name, I create a record for her with the husband's surname. In the software's Notes, I indicate that her maiden surname is unknown. For example, the obituary may contain an item like: son John (Mary). A new record for John's wife Mary will initially have her surname as the same as John's while I research to find the wife's maiden name. Lots have never been found.
8. In many of the software's Notes, I identify web sites. I never identify parts of web sites. Why? Web Sites are so easy to change. For example, the Friends of Irish Research web site was changed recently to add our free Seminars to our School link. The free Seminars are an important part of our service to the community and community outreach efforts.
9. I do not capture and load images of official documents from web sites to my database. I do not include photos or newspaper images etc. Why? I try to use as little storage as possible. Images especially photos use a lot of space.
10. If possible, I never use information from Ancestry's Public Trees or Family Search's Free Family Trees. Why? Too often there is conflicting information. Ancestry Public Tree software for example identifies conflicts. (Usually one is correct and the others must be copies or errors.) When faced with conflicting information that I can't resolve, I identify the conflicts in my software's Notes. For errors, I also try to get the informant to change the errors because I can't. (It is not my record.) There will be another article with a good news story on Ancestry's Family Trees.

Please note that to-date. I have not had to record a same sex marriage. My current genealogy software can't accommodate it. The marriage part of the software requires a Male and a Female. I suspect that when I need to record a same sex marriage, I'll have to: (1) find software that allows recording of same sex marriages; (2) generate a GEDCOM file; and (3) use the GEDCOM to load the new genealogy software. The new software will need to handle over 30 thousand people; have easy to use software for produce and input a GEDCOM file; have software to match and to merge duplicate records; have a relationship calculator; have tables to validate and fill in USA and Canadian Counties; and have software to easily produce Pedigree Charts, Family Group Sheets and a Register Report with an Index. For my wife's family, tables to validate Irish and British locales would be an added benefit.

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Your comments and suggestions are important to me. My address is: [joe-apg@norwoodlight.com](mailto:joe-apg@norwoodlight.com)

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