**People of the Founding Era: A Prosopographical Approach**
Workflow Manual
Revised June 2016

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1       **Introduction to the People of the Founding Era**

The goal of the People of the Founding Era: A Prosopographical Approach project (or PFE) is to produce a digital publication that serves as a scholarly reference work with biographical information on thousands of people born between 1713 (the end of Queen Anne's War) and 1815 (the end of the Napoleonic War), drawn from the digitized documentary editions of the Founding Fathers and other documentary editions of the Founding Era. It has two components. First, it provides fully searchable biographical statements that vary greatly in scope and extent. Second, it provides identically structured data for each person allowing for group, or prosopographical, study. In essence, we take the data just as it is created by the documentary editions and supplement it with additional research and a data structure. The focus of our research is people's basic life facts – what we refer to as prosopographical data. These facts include date and place of birth and death, occupations, and certain life events. A secondary aim is to provide connections between people in PFE through family relationships, business partnerships, institutions, and military units, for example.

PFE has been funded by the Andrew W. Mellon Foundation since 2008 in four grants periods referred to as PFE I, PFE II, PFE III, PFE IV.

The great majority of our research will be conducted online. PFE II and *The Hamilton Papers* added roughly 40,000 names to our population, and we are continuing to add more with new sources in the final phase. Considering the size of our population, we cannot spend much time fully researching and recording every detail about the life of each individual. Rather, we strive to connect together the instances of each individual throughout the various Founding Father papers and provide a solid basis of contextualized data concerning each individual.

1.1     **Project Management: Basecamp**

For project management and discussion we use Basecamp:
https://launchpad.37signals.com/basecamp/ Project materials and instructions will be posted in Basecamp.

1.2     **Project Database: DARMA**

The database suite that we use for creating records and storing information is called DARMA, produced and maintained by IDM USA.; the URL for the PFE DARMA database is:
http://dcdarma.dataformat.com/Login.aspx

## 2　The DARMA Layout

### 2.1　DARMA Homepage

This is the first page encountered upon logging onto the PFE DARMA project. This page contains a sidebar with the Collections and Lists tab, which contain every record and documentary source in the PFE project; the Criteria bar, which is used to search the collection; and the Display Bar, which displays the results of the search. These functions are described in detail below.

## Collections Tab



DARMA contains a number of collections of records that are pertinent to PFE. These collections are searchable through the Collections Tab on the DARMA PFE homepage. The two primary collections are *Biographies* and *People of the Founding Era*. *Biographies* contains roughly 117,000 text-based records from the various Founding Father papers, sorted by source. These snippets of text, called biographical references, are the context from which we have created the person records. These *Biographies* records should contain the biographical reference and appropriate citation as well as a link to the *People of the Founding Era* record.

The *People of the Founding Era* collection contains, at present, roughly 70,000 person records who make up our Founding Era population. The *PFE Occupations*, *PFE Role Names*, and *People of the Founding Era Organizations* collections contain records for the various occupations, roles and organizations that our people of the founding era held/joined.

The *PFE Flourishes* collection contains a collection of records that represented a life event, for example, 'Died while traveling' or 'Disowned by the Society of Friends'. Researchers will make links to these flourishes on the Links tab to express life events in PFE records. *Place Names* is our collection of geographic locations that represent a birth place, a death location, or a residence of a particular record. Researchers will open the birth, death or residence fields on a PFE object record and select the location.

There are three other collections, *PFE II Staging*, *PFE II Slave Population*, and *PFE II Unclear*. *PFE II Staging* records are backup records of our second extraction of persons from the

various Papers – no work should be done on staging records as corresponding *People of the Founding Era* records have been created. The *PFE II Slave Population* records contain all of the records of slaves that were created in the second extraction. These records are being researched in a separate process from the main population. *PFE II Unclear* records are those records where the original textual context does not provide sufficient information to clearly identify the person (ex. "Mr. Adams went to the Boston market" – this person will be impossible to identify definitively).

**Lists Tab**
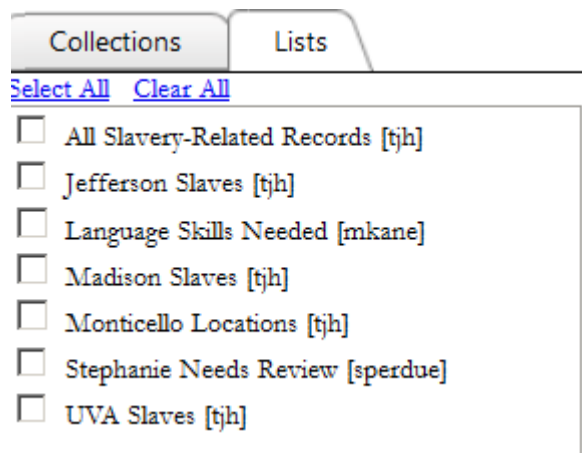


This tab contains a number of lists created to help organize and search for subgroups of individuals in DARMA. These lists are created by project administrators on an "as needed" basis. Most of the lists are related to slave populations and include the following:

! All-slavery related records
! Jefferson Slaves
! Madison Slaves
! UVA Slaves

Administrators may create lists to identify and organize records requiring certain skills to read and edit them, such as the list "Language Skills Needed" that contains source materials in languages other than English. Other lists might be created to direct and organize tasks for individual employees.

## Criteria Bar



These fields are used to search the records and documents contained in the Collections and Lists tabs in the sidebar. The "And/or Name" field contains a dropdown menu allowing you to search metadata such as forename, surname, Unique ID number, and Link Type. The criteria available in the first dropdown menu varies depending upon the collection selected to search. The Operator field is used to refine and limit the information selected in the "And/or name" field. The Operator dropdown menu has several options and you must be careful to select the appropriate one as certain operators only work with certain search criteria. Enter the information you are searching for, such as a person's name, event, location, etc. into the Value field. You can further refine or enlarge a search by clicking on the green "Plus" sign, which will add another line of identical search fields below. To clear a search field or remove it, click the red "X" symbol.

## Operator Field Selections

! Contains – displays records that contains any part of the search term entered in the Value field

! Does not contain – will display all records that do not contain the search term entered in the Value field. This is often too general of a search.

! Equals – will display only those records that are exactly like the search term in the Value field.

! Does Not Equal – will display all records that do not contain the exact search term entered in the Value field.

! Precedes - searches for all records that come before (chronologically, alphabetically, etc.) the entered search values.

! Follows - searches for all records that come after (chronologically, alphabetically, etc.) the entered search values.

! Is Empty – displays all records for which the field selected in the "And/or Name" dropdown menu contains no information. This search operator can be useful for

identifying records that need information filled in, like a person's birth place or religious faith.

! Is Not Empty – displays all records for which the field selected in the "And/or Name" dropdown menu contains some kind of information. This search is useful for identifying records that already have certain information completed. When combined with another search term, this option is also useful for excluding certain records that already contain one type of information but not another one. For example, by searching for records for which the birthdate "is not empty" and the birthplace "Is Empty," you can work on only those records where we know a person's birthdate, but not their birthplace – a very important piece of information that should be filled as often as possible.

## Display Bar

Search results will be displayed in this field. The Default view will display each record



(from left to right) by Document collection, Object Name, date last edited, and last editor. The information displayed in the results can be modified by selecting a different view from the dropdown menu. By checking the box next to Unique ID right above the results, you can also view each record's Unique ID number along with the View selected.

## Selection Bar



The menus in this bar allow you to print and export selected records or to add them to an existing list.

2.2 __DARMA Tabs__

   Each person in PFE has their own object page in DARMA, where the information about them is entered and stored. These pages are broken up into a number of tabs which organize different elements of the data. Many of the individual fields display instructions – make sure to follow them, as data in the wrong format cannot be processed.

__The Object Box__ is always displayed at the top of the page. It contains the person's full name (known as an object name), the PFE collection to which the person belongs, the person's DARMA Unique ID number, and the date and username of the last editor of the record. Occasionally, this information may need to be edited, which can be done by clicking on the pencil symbol in the bottom left hand corner.



Important Notes: Many object names were taken directly from the Rotunda Index, and duplicate records may have accidentally been created if the same individual is listed in Rotunda under multiple names (i.e. "John Walker of Albermarle" is the same as "John Walker of Virginia."). Additionally, the Unique ID number, also known as the PFE identifier, is the number that Documents Compass has assigned to each individual in DARMA. However, each individual may have many other ID numbers, including the Project ID number, the VIAF ID Number, the Monticello Slave Database ID, etc. Be very careful not to mix up which ID number you are searching for or editing, as it is easy to make mistakes. The PFE identifier displays in the object box as well as the record's URL.

**Primary Fields:** The Primary Fields tab displays core fields from the other tabs in order to present a single view of the record's most important information. Information entered into corresponding fields in other tabs will automatically display in the Primary Fields tab. This information includes the fields for full name, gender, life dates, birth and death place, faith, canonic URLs from Rotunda, and citations. It includes the Check Out field, which displays the username of the record's primary editor.

| Primary Fields | Info | Places / Dates (PFE-only) | Costa |
|---|---|---|---|
| Full Name | Babb, Mary Bowen | | |
| Generational Name | | | |
| Gender | F | | |
| Faith | | | |
| Birth Date | 1742-04-03 | | |
| Birth Date Certainty | high | | |
| Birth Place link | Frederick County, Virginia, United States | | |
| Death Date | 1825 | | |
| Death Date Certainty | high | | |
| Death Place link | Greene County, Pennsylvania, United States | | |
| Residence Place link | Frederick County, Virginia, United States | | |
| Workflow Status | Ready | | |
| Record Checked Out By | E. Berry | | |
| Check Out Date | 2014-03-22 | | |
| Docs Compass Citation | Ancestry (accessed 2014-03-22). (view) | | |
| Rotunda Canonic URLS | | | |
| PFE II Rotunda Index Entry | (view) | | |
| Monticello Slave DB | | | |
| Montpelier Database ID | | | |

**Info Tab:** Most of the space on this tab is dedicated to categorizing the component parts of names. The "name type" drop-downs allow us to specify maiden names, nicknames, surnames, and other bits of info. Faith, Gender and generational names are recorded here. Role names should now be entered as links, not in the old role name fields.

| Primary Fields | Info | Places / Dates (PFE-only) | Costa | |
|---|---|---|---|---|
| Full Name | | Babb, Mary Bowen | | |
| Generational Name | | | | |
| Gender | | F | | |
| Faith | | | | |
| Faith (uncontrolled) | | | | |
| Old Role Name 1 | | | | |
| Old Role Name 2 | | | | |
| Forename | | Mary | | |
| Forename 1 Type | | | | |
| Forename 2 | | | | |
| Forename 2 Type | | | | |
| Forename 3 | | | | |
| Forename 3 Type | | | | |
| Forename 4 | | | | |
| Forename 4 Type | | | | |
| Forename 5 | | | | |
| Forename 5 Type | | | | |
| Surname | | Bowen | | |
| Surname 1 Type | | maiden | | |
| Surname 2 | | Babb | | |
| Surname 2 Type | | married1 | | |

As it provides the official version of the name, to be displayed on the published PFE site, it is important that the info tab in DARMA contain accurate representations of individuals' names. Names on the info tab are broken into components, divided into Forenames and Surnames, and sorted by various name types:

!    "Middle" for additional forenames, included as a forename.
!    "Maiden" a woman's birth name, **included as surname1.**
!    "Married 1, 2, 3, etc." Surnames taken upon marriage, listed in chronological order.
!    "Nickname" is for shortened or familiar versions of names, such as Polly for Mary or Sally for Sarah.
!    "Pseudonym" is for pen names, aliases or any other fictional names used by individuals.
!    "Alternative" is for variant spellings (Abbot, Abbet, Abbott).

!      "Native American" is for individuals with both European and Native American names.

!      Mostly these people will be Native Americans, but we also have records for names given to George Washington by various tribes.

!      "Landed" is for men who changed surnames upon inheriting land.

!      These are not role names (new titles), but changes to their personal name.

!      "Dynastic" is for surnames that are drawn from an individual's membership in a dynasty, such as the Bourbons of France.
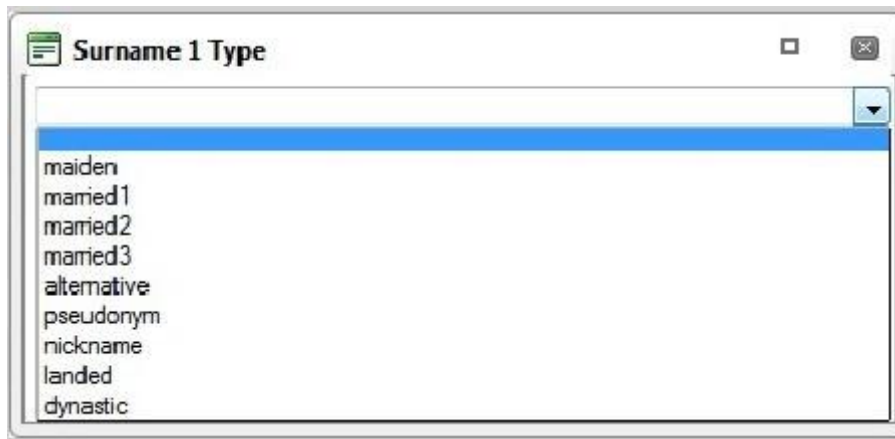


**Project Specific ID** – this ID number often contains both numbers and letters and is provided to us from the participating project. They are not consistent. For example, an ID number starting with the letter "N" means that this individual is part of the Pinckney Papers biography collection. This number is not the same as the DARMA Unique ID number listed in the Object box. The Old PFE ID and the PFE II Biographical Text fields are rarely used and can usually be ignored.

**Places & Dates Tab:** This tab replicates much of what is found on the Primary Fields tab; filling out a field on one tab fills it out on the other as well. It contains fields for residences, birth and death places. Also included is an uncontrolled <u>flourish field</u> – this is to be used only when a link cannot be made to a flourish record.

| Primary Fields | Info | Places / Dates (PFE-only) | Costa |
|---|---|---|---|
| Birth Date | | 1742-04-03 | |
| Birth Date Certainty | | high | |
| Birth Place link | | <u>Frederick County, Virginia, United States</u> | |
| Death Date | | 1825 | |
| Death Date Certainty | | high | |
| Death Place link | | <u>Greene County, Pennsylvania, United States</u> | |
| Residence Place link | | <u>Frederick County, Virginia, United States</u> | |
| Flourish Info DO NOT USE | | | |
| Floruit1 Date DO NOT USE | | | |
| Floruit1 Description DO NOT USE | | | |
| Floruit2 Date DO NOT USE | | | |
| Floruit2 Description DO NOT USE | | | |
| Event Dates (unclassified) | | | |

When entering places and dates in DARMA, there is a particular format which must be obeyed. If material is not entered in the correct format, it cannot be processed clearly when we publish it. **Dates** must be in the format **YYYY-MM-DD** – this is the standard machine-readable, ISO format. Always use ISO dates in DARMA. See **Section 3 "PFE Research Workflow"** below for more information on date formats.

**Place Names:** Place Names exist as a separate collection of records, which can be linked to in the birth, death, and residence fields on the Primary or Place/Dates Tab.  To avoid confusion and inconsistency, use modern place names for all locations in PFE. We currently have a database of 10, 548 geographic locations available, which should cover most of the locations needed for recording information about people of the founding era. However, occasionally new records are necessary, see Section 3's instructions on "creating new place records."

<u>**COSTA:**</u> This tab was created to accommodate the unique data from the Runaway Slave ad project and it is only used for storing that project's data.

**Workflow Tab:** This tab tracks the progress of an individual record and records the primary researcher of a record.

| Primary Fields | Info | Places / Dates (PFE-only) | Costa | Workflow | Sources | Links ( |
|---|---|---|---|---|---|---|
| Attachments (0) | Lists (0) | | | | | |

| | |
|---|---|
| Workflow Status | Ready |
| Workflow Notes | I couldn't really found out much else about Mary Bowen (her record was partially completed) which I found to be pretty standard on the Ancestry "trees," but not precise death dat... (view |
| Record Checked Out By | E. Berry |
| Check Out Date | 2014-03-22 |
| Date Added | |
| Temp Link ID | |

**Workflow Status**: This is the primary field for recording the status of a record in the workflow.

**Workflow Status**

Ready ▼

Advertisement
**Ready**
Marked for Deletion
Needs Review
Record not to be published
Advertisement - Needs Review
Special Project - Under Review

Last edited: EBerry 3/22/2014 1:44:39 PM

Save   Cancel

- !      Ready - When a researcher has completed research on a record, select the value 'Ready'.
- !      Marked for Deletion - If a record needs to be deleted, select Marked for Deletion. This is usually used for duplicate records that need to be removed. Only a senior administrator is able to actually delete a record.
- !      Needs Review – used to indicate that a researcher has noticed an issue with a record that he/she cannot resolve. These records will be reviewed by a project manager.

!       Record not to be published – this status is often used for records that are outside of the primary date range of the project or that provide useful information for the editors, but do not meet the primary goals of the project. In this case, there is little need to delete the record, but it should not be published on the public website.

!       Advertisement Needs Review – this status is primarily used to designate Runaway slave adds from the Geography of Slavery project, most of which need additional research and review to fill out the record after the initial extraction.

!       Special Project Under Review – This status is used to designate records that require a different workflow (such as research on slave populations). Unless assigned to the project, you will probably never use this option.

**Workflow Notes:** This field is mainly used to note problems with the record. When making a note, the editor should record their initial or username and the date, which makes future consultation about a record much easier.

**Record Checked Out By**: The primary field for self-assigning work by researchers. Researchers making substantial changes to a record should indicate they are working on this record by selecting their username from a dropdown menu. Staff making only small changes need not check out the record.

**Check Out Date:** This field is used to indicate the last date the record was checked out for substantial changes.

**Date Added:** This field indicates the date on which the record was created in DARMA.

**Temp Link ID** - This is an internal reference used by the programmers and can be ignored.

## The Sources Tab

The Sources tab will contain all of the source and citation information relating to the research performed on a People of the Founding Era collection record. The Docs Compass Citation field on the Primary Fields tab is replicated here.

| Primary Fields | Info | Places / Dates (PFE-only) | Costa | Workflow | Sources |
|---|---|---|---|---|---|

| Attachments (0) | Lists (0) |
|---|---|

| | |
|---|---|
| Docs Compass Citation | Ancestry (accessed 2014-03-22). (view) |
| Docs Compass Notes | |
| Missing Role Names | |
| Missing Occupations | |
| Missing Organizations | |
| Missing Flourish | |
| Rotunda Canonic URLS | |
| PFE II Rotunda Index Entry | (view) |
| Monticello Slave DB | |
| Montpelier Database ID | |
| Mount Vernon Database ID | |
| Encyclopedia VA link | |
| VIAF Number | |
| Costa ID Number | |

**Docs Compass Citation:** This field will provide the published citation for the individual record. Clicking on the Docs Compass Citation field will open an XHTML text editor window. Following the Citation Guide, create a citation for the source or sources that were used to research a PFE record. Although we are doing our research on websites, the published citations **will not include** URLs (place URLs in the Docs Compass Notes data field instead).

**Docs Compass Notes**: This field is specifically designed to be a non-published field of data related to research sources. Its purpose is to allow researchers to share information with each other, and record information important to the research process. Clicking on the Docs Compass Notes field will open a Freeform Text Editor window. See example of a Freeform Text Editor in the Appendix entry "Types of Fields."

Types of information to be added to the Docs Compass Notes field:
!        Record specific URLs of websites used, ex. Wikipedia or Google books URLs.

!        List additional resources for consultation, but which may not be appropriate for publication.

!        Elaborate on the research process for a certain record.

!        Describe conflicting information in various sources or other discrepancies.

!        If you make large changes to a previously researched record, record the problematic issue and the correction.

●        Sign your note with your username and the date – DARMA only records the last person to save a data field.

!        Do not use the Doc Compass Notes field on the Source tab to address workflow issues better addressed on the Workflow tab, such as reasons for marking a record for review or deletion.

**Sample Docs Compass Note**:



**Missing Role Names, Occupations, Organizations, Flourish:** These three fields allow a researcher to enter a role name, occupation, flourish or organization which is not currently in DARMA. These fields will periodically be reviewed so that new roles, occupations or organizations can be added to our database.

**PFE II Canonic URL:** About 15,000 records in the *People of the Founding Era* collection do not have an attached biography record. When we ran the second extraction of names from the

GW papers, we collected index links, which were shortly thereafter changed in Rotunda, thus breaking all of our links. Since a subscription to the published People of the Founding Era website will also include a Rotunda subscription, we will be providing our users with a canonic URL for these ~15, 000 records created from the GW papers.

**Monticello Slave DB, Montpelier Database ID, and Mount Vernon Database ID:** These fields are used for the enslaved individuals projects and record non-PFE database ID numbers.

**Encyclopedia VA link:** This field is for the records which have a corresponding article in the Encyclopedia Virginia, another digital humanities project at the VFH. It is not necessary to check for this link: most, if not all, records with such a corresponding article have already been researched.

**VIAF number:** Most important figures, such as George Washington, will have Virtual International Authority File numbers that serve as an international ID number. This number can be found on Wikipedia.

**Costa ID number:** If it exists, this is a unique project identifier assigned by Costa to his data.

## The Links Tab:

This tab is used to create connections, known as links, between records in DARMA. These links indicate a wide variety of things, from the connections between Person and Biography records to the network of personal and organizational relationships that forms a major aspect of PFE. The number and types of links have been dramatically expanded since the first document extraction in the PFE I grant.



**Incoming and Outgoing Links:**

!      Incoming Links are all links that originate in another record, either in PFE or the Biographies collections, and establish a relationship with the individual of the current record.
!      Outgoing links are used to create a relationship between the current record and another individual in PFE or a biography.
!      Example: Thomas is Martha's father
     "      From Thomas's record, an outgoing "Family: Father" link should be made to Martha's record
     "      From Martha's record, an outgoing "Family: Child" link should be made to Thomas's record
     "      It is not necessary to make links in both directions – making a link in one direction (whichever you come to first) will suffice. This Link will appear as an incoming link on Thomas' record.
●      The PFE record is the primary record. When creating links to biography records, organization records, and occupations, the link type should be an outgoing link from the main record to secondary records.


**Link Types**:

!      Family links – these links made up the great majority of linking in PFE I. We are primarily concerned with the "nuclear family" – parents, children and spouses. If we have these relationships between generations of family, it will be possible to build family trees in which relationships such as aunt/uncle and cousins. It is still possible to make extended family links, however.
!      Occupation links – should be made only to the All PFE Occupations collection.
!      Role Name links – should be made only to the various Role Name collections.
!      Flourish links – should only be made to the PFE Flourishes collection.
!       Business link – at present, these links include employer/employee, partner and associate.
!      Servitude links – these include "Served" (for unbound servants), "Indentured to" (for those bound for a period of time), and "Owned by" (for slaves)
!      Organization links – these are for scientific, charitable and social organizations
!      Education and Military links – these are for people involved with educational institutions and military units.
!      Possible Duplicate – used to indicate records which may be the same but cannot be determined
!      Match Combine – an administrative link type used mostly for cleaning up records. When you can show that two records are the same person, make a match combine link between the two records.

**Attachments Tab**: We're not using this tab at present.

**The Lists Tab:** Lists allow a person to keep track of the records on which they are working and quickly search their particular subset of records in DARMA.



A record can be added to a list by selecting the appropriate list from the dropdown menu under the lists tab and clicking "Go." To remove a record from a list, simply click the red "X" symbol on the lists tab.

3      **PFE Research Workflow (Or "How to Make a Record")**

**General Work Guidelines**

On average, each record should be researched for **5-10 minutes**. Thus a more comprehensive guideline is to research 6-12 records an hour, which should translate to roughly 90 records per ten hours of work per week.

For individuals well-represented in the historical record, researchers should focus on basic life information rather than details. Due to the size of our population, we need to focus on presenting a solid record of each individual. Therefore, prioritize birth and death dates & places, a primary occupation, a canonic URL for records without a biography record, and links to other persons in DARMA. Input all information in the correct format – all information must be machine readable and our website will not work properly if data is not entered in a standardized format.

The second extraction of names from Rotunda (PFE II) pulled in every person mentioned in the Papers. It is important to remember that while some people had a tremendous impact on the historical record, others left little to no evidence of their existence and may not be mentioned again in any historical record. Therefore if you are completely unable to research an individual, and it becomes quickly obvious that there is no information to be found about this person, move on to another record in order to utilize your time more efficiently. In this case, it is acceptable to leave the record empty. Just make a note in the Docs Compass Notes field on the Source tab to indicate what sources you examined.

Above all, exercise caution: no information at all is better than wrong or misleading information.

At **bi-weekly meetings,** we will discuss examples of records that people have been researching. The meeting will be scheduled on Basecamp. We will discuss records as a group to identify things done well or things that could be improved. If people have questions they want addressed, they can nominate their own records; otherwise, we can pick records at random and work through them.

**Step 1: Check out a Record**
!      Click the box next "People of the Founding Era" in the Collections tab on the homepage.
!      Search for "Record Checked Out By/ Is Empty" to locate un-researched records. Select a record from the displayed results. (If working on a specific project, perform the appropriate search.)
!      Open the Workflow Tab.
!      Select your username from the Record Checked Out By drop down list.

!      Enter the date in the "Check out Date" field.

!      Editors making minor changes or adding additional links to a researched record need not check out the record as their info is saved automatically after making a change. However, the person represented in the <u>Record Checked Out By</u> field is the primary researcher for that record.
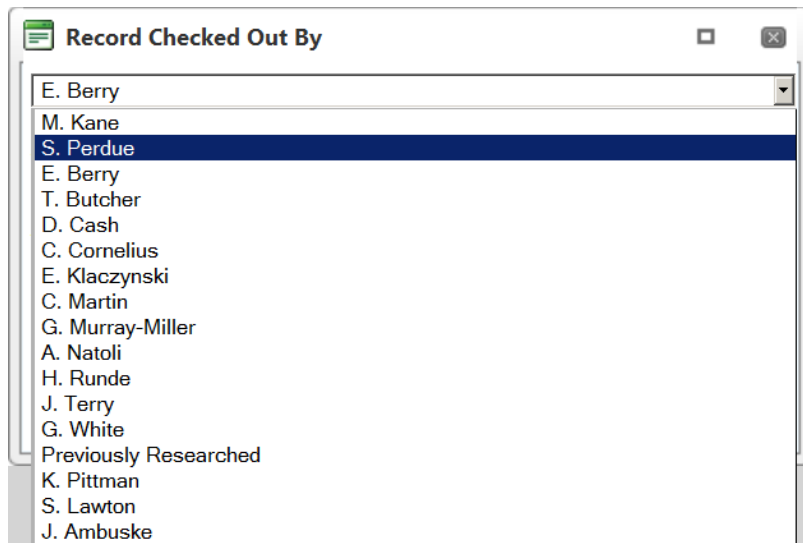


**Step 2: Locate Biographical Sources**

!      Use Biography Records first. Open the Links tab in the object record and look for a link to a biography record. Click on the Biography link and go to its Info tab. For the full context of the document, rather than just a snippet, copy and paste the Source URL into your web browser. To start transcribing information into an individual's record, see **Step 3 below.**

!      Search the Rotunda Index (http://rotunda.upress.virginia.edu/founders/Utilities/indexsearch.xqy) for more documentation. Be careful to look for records that might be listed under an alternate name. For instance "John Walker of Albemarle County" might contain more documents that are for the same individual as "John Walker of Virginia." Many records already contain links to their index entries in the PFE II Rotunda Index Entry field on the <u>Sources Tab</u> – however, links to the GW Papers will be broken since the GW Papers has changed their index slightly (some Jefferson links are also now broken). Thus, for records with broken index entry links, search for the person in the Rotunda index search tool listed above.

!      Search the Internet last. Internet sources should only be used after exhausting the available Biography records and Rotunda documents, usually to fill in gaps in these records. See a list of frequently-used sources on the Internet in Section 4 "Research" below.

**Step 3: Data Entry**

! Go to the <u>Info tab</u> and use the biographical sources you found in Step 2 to enter the person's forenames, surnames, full name, gender, and religious faith in the appropriate fields.

    " Check that any existing information is correct as a previous programmatic extractions often contained errors and misrepresented names. In many cases, we will also need to add new names to the info tab, particularly pseudonyms and married names that may not have appeared in the Rotunda entries.

    " For example, instead of 'John' the name might be 'John of' or names of firms or names of multiple people in the same record often end up with the word "and" listed as a forename. These mistakes are very important to correct.

| Primary Fields | Info | Places / Dates (PFE-only) | Workflow | Sources | Occu |
|---|---|---|---|---|---|
| Full Name | Bass, Maj. and Lt. Col. Jonathan | | | | |
| Role Name 1 | Maj. | | | | |
| Role Name 2 | Lt. | | | | |
| Controlled Role Names | Col. | | | | |
| Uncontrolled Role Names | | | | | |
| Forename | and | ⟵ No. | | | |
| Forename 1 Type | | | | | |

    " Pay special attention to the "gender" field, as programmatic processes were used to assign this value. The default value is male, but a list of common female names was compared with the population to assign female gender values. This was not 100% accurate, and the default value "male" was mistakenly assigned to female records.

! Open the Places/ dates tab and enter their birth and death dates, as well as their birthplace, death place, and any known residences.

**Birth Date**

1742-04-03

Known Dates= YYYY-MM-DD enter as 1789-04-01_____precise date YYYY-MM enter as 1789-04_____year and month YYYY enter as 1789_year only Circa Dates= c. YYYY enter as c. 1789-- Before YYYY enter as Before 1789-- After YYYY enter as After 1789-- After YYYY-MM-DD enter as After 1789-04-01-- DO NOT USE slashes, commas, ca., or text of any kind

Last edited: EBerry 11/2/2013 5:13:29 PM

Save    Cancel

" **Dates** - Use the ISO format YYYY-MM-DD for all dates in DARMA. You may also enter just "YYYY-MM" or "YYYY" if you don't have more specific info. If uncertain of the exact year, use "c.YYYY" or the date range "YYYY to YYYY" or "YYYY-MM to YYYY-MM." **Use the word "to." Do not use dashes.** We now discourage the use of "before" or "after" with dates as these are too wide-ranging. Optimally, all dates will be entered with a high degree of certainty. Only use the medium or low certainty values when absolutely necessary. It is often better to leave the dates out if you are this uncertain. If you cannot get within ten years of the actual date, do not put a date.

- Date certainty:
    # High – the date is accurate within two years.
    # Medium – the date is accurate within five years.
    # Low – the date is accurate within ten years, or there is reason to treat the source as suspect.

" Places - Click on the data field to open the Places Collection.

- Enter the place name in the object bar and select it from the results in the dropdown menu. Enter place names based upon their present-day location. Many locations in historical Virginia, North Carolina, and Massachusetts are now in the states of West Virginia, Tennessee, and New Hampshire.

- If you cannot find the specific location, such as a neighborhood, look for the next level up in order of city, county/township, state, country. If you still cannot find an acceptable location, see instructions on "Creating place records" below.

- Enter date of a person's residence at this location in the attribution field. - Click the green "Plus" symbol and then "Save."

! Open the Source Tab.

" If you used any research besides Rotunda documents (Internet, books, articles), enter its citation in the "Docs Compass Citation" field. You do not need to cite

the references drawn from Rotunda – this is cited either as the canonic URL or the biography record which is linked to person record.

- Do not include website URLS in this field, just the name of the website and the date it was accessed.
- See the **"Citation Style Guide" in Section 4 "Research" below for formatting policies**.

" In the "Docs Compass Notes" field make any notes regarding your research process or problems (such as inconsistent Birth and Death dates) in **all** sources, including Rotunda documents. Place URLs from Internet resources in this field. It is not required to use this field, but it is helpful.

" If you found Rotunda documents that do not have a biographical record in PFE, enter the Canonic URL from the citation box at the bottom of the document in Rotunda into the "Canonic URL" field in the Sources tab.

" If there is no entry in the "PFE Rotunda Index Entry," copy and paste the index entry from the Rotunda Index Search tool into this field. If it already has an Index entry from the George Washington Papers (GEWN), update this field by performing a search for this object name using the Rotunda Search tool.

" Ignore the fields with the word "missing." If you know the individuals VIAF, Monticello slave DB number, etc., enter it into the appropriate field as well, but this is rarely necessary.

**Step 4: Make Links**
! Open the links tab.
! Select Link type in the drop-down menu.
! Select the sub-collection containing the target record. For example, select "W surnames" for the target record "Walker, John."
! Begin typing the desired object name – after three characters, DARMA will suggest possible matches. Keep typing until the correct name appears, then select it and click Create Link.
! Fill in any relevant data in Info Fields 1 and 2. Info 1 is for dates only. Info 2 is for other bits of information relevant to the link, broken down by link type. See instructions by link type below.

" The same date formatting rules apply here as elsewhere. See Workflow section of Places and Dates above.
" The date range format "YYYY to YYYY" is also applicable if there is uncertainty between two specific dates, such as someone who bought a business in either 1737-04 or 1738-04, which becomes "1737-04 to 1738-04"

! Flourishes, Occupations, and Role links are made by selecting the collections "PFE Flourishes, PFE Occupations, or PFE Role Names" from the collection menu. Flourish links and Role Links have some special requirements. See instructions for these kind of

links below. Occupation links are created and filled in basically the same as relationship links, and rarely require data in Info fields 1 and 2.

! If you suspect there is a duplicate record, make an outgoing link to that record using link type "Possible Duplicate." If you've confirmed there is a duplicate record, make an outgoing "Match-Combine link." For instructions on how to combine duplicate records, see "Match-Combine" in the appendix.

! If you accidentally create a link or need to edit the link type, you can delete it by pressing the X button or alter it with the pencil-and-pad button.



**Incoming Links**

| Type | Collection | Source | |
|------|-----------|--------|---|
| Biography | A Surnames | Abercrombr, Robert | ✏ ✗ |

Link Type Instructions:

! **Family links**: As a general rule, family links do not need any information in Info 2, and most do not need a date in Info 1 either – birth and death dates suffice to convey the duration of a parent/child or brother/sister relationship

! **Spouse** links need a beginning date, the date of marriage. They do not need an end date except in cases where the marriage ended before death, such as divorce or annulment

! **Romantic Affair** links require a beginning date and an end date, if at all possible. This link is meant to indicate long lasting, socially significant, non–marital relationships.

! If such information can be found, Adopted Child links should indicate the date at which the child was adopted

! **Servitude links**: with a few important exceptions, servitude links will not need anything in Info 2, as much of that information will be stored elsewhere
   " The location of servitude will be captured in Residence information
   " The specific task performed by a servant or slave will be captured as an Occupation
   " Important life events, for the most part, will be captured as Flourishes
   " Served and Indentured to should capture the period of service as accurately as possible in Info 1
   " Likewise, Hired Out to should indicate the period in Info 1
   " If a slave belonged to one master their entire lives, it is not necessary for Owned by to include dates in Info 1, just as brother/sister links do not need it
   " If a slave does pass from one owner to another, make separate links for each owner.
      - For the first owner, indicate the date at which ownership ended in Info 1 and the manner of transfer in Info 2 For instance, "sold to x," "bequeathed to x," or "in dowry to x."

- For the second owner, indicate the date at which ownership began in Info 1 and, with different language than the first, the manner of transfer in Info 2. For instance, "sold by x," "bequeathed by x," "in dowry from x"
  " If a slave was freed, indicate the date of manumission in Info 1 and the manner of manumission in Info 2. For instance, "purchased freedom," "freed by will"
- ! **Business links**: If the name of a firm or other business can be found, indicate the name in Info 2, such as Virginia favorite "Allen, Allen, et cetera & so forth"
  " The task performed by an <u>Employee</u> should be captured as an Occupation
- ! **Links to Arts & Science, Social & Philanthropic, and Political (not Governmental Body) organizations**: with a couple of exceptions, these only need a date in Info 1 – the date at which membership began, and the date at which it ended if an end date can be found (do not need to include death date)
  " If possible, include the particular <u>Freemason</u> lodge to which an individual belonged in Info 2
  " For the <u>Democratic-Republican Societies</u>, the <u>Sons of Liberty</u> and the <u>Society of the Cincinnati</u>, indicate the colony or state in which the individual participated in the organization
  " For the knightly orders, such as the <u>Most Honourable Order of the Bath</u> or the <u>Most Noble Order of the Garter</u>, include the grade (rank) if you can find it. A full list of the grades can be found in the info bar at the right of each order's Wikipedia page
- ! **Links to Governmental Bodies**: indicate the date during which an individual participated in the body in Info 1; many of these links will require values in Info 2 as well
  " For national and state <u>Congresses and Legislatures</u> and <u>Parliament</u>, indicate the office held and the constituency represented
  " For instance, "Senator from New Hampshire," "Congressman from Charlottesville," or "MP from Berwickshire, Roxburgh and Selkirk"
- ! **Links to Military Units**: the term of service in a unit should be indicated in Info 1 " We should be able to correlate the dates at which a rank was held in Role Names with the dates here, so that ranks do not need to be stored in more than one place
  " For <u>State Militias</u> and <u>British Army regiments</u>, indicate the name of the unit in Info 2 if you can find it
- ! **Links to Educational Institutions**: most of these will require values in both Info 1 and Info 2
  ! When making <u>Student at</u> links, indicate the period of education in Info 1 and the degree obtained (or "Did not graduate") in Info 2
  " When making <u>Taught at</u> links, indicate the period of service in Info 1 and the subjects taught (if they can be determined) in Info 2

"      For instance, "rhetoric; natural philosophy; theology"

!      **Biography and Match_combine links** do not need anything in Info 1 or Info 2.


**Making Role Links:**

!      To reduce redundancy, only to link to role names that are distinct, in language, from the occupations associated with them. For example, if someone is linked to the occupation minister, then a role name link is unnecessary

!      On the Link Type menu, select "Role." On the collection menu, select" PFE Role Names." Start typing the desired role name in the object field, and select it from the dropdown menu. Fill in Info fields 1 and 2 according to the instructions below. Click "Create Link."

!      Info 1 is for dates. Indicate the period during which an individual held a particular role. Or, if the role name did not expire (for instance, a King is a King for life unless dethroned, and former Presidents are still addressed as "President X"), include only the date at which they acquired the role.

!      Some role names require values in Info 2:

     "      **American Army, Navy and Marine** ranks often do not need anything in Info 2 – links to military units will provide additional information. However, links to militia units or the British Army can include regimental data in info 2.

     "      Military role names are how we record military ranks, the occupation of a Colonel (or another officer rank) would be Officer (or naval officer, etc.) and the occupation of a Private (or another enlisted rank) is Enlisted Soldier.

     "      **Clergy:** <u>Abbess, Abbott, Archbishop, Bishop, Canon, Canoness, Dean, Prince Archbishop, and Prince-Bishop</u> require the name of the individual's clerical jurisdiction in Info 2. For instance, Abbott of Clairvaux.

     "      **Diplomatic**: <u>Ambassador</u> and <u>Envoy</u> require the name of the country or entity to which the individual was sent. For instance, Thomas Jefferson, Minister to France.

     "      **Education**: <u>Chancellor, Dean, President, Provost and Rector</u> require the name of the school at which they served in Info 2. For instance, President of the University of Virginia.

     "      **Gentry**: <u>Chevalier, Laird, and Seigneur</u> require the name of the attached estate in Info 2.

     "      **Nobility** role names require a value in Info 2.

         -      For instance, Duke of Wellington, Duc de Burgogne

     "      **Royalty**: <u>Emperor, Empress, Prince Consort, Queen Consort, Sultan, Sultana, Tsar and Tsarina</u> should have a country value in Info 2 – Use consistent formatting for prepositions, as follows:

- English language nobility, clergy, school administration: put "of" before the place name, as in Arthur Wellesley, **Duke of Wellington**
- Non-English nobility: follow the format provided in the record or found on Wikipedia, as in Louis Philippe, Duc **d'Orléans** or Wilhelm VI, Landgraf **von Hessen-Kassel**
- With nobility, it is still necessary to include the number associated with the title in the Generational Name field on the main record's INFO TAB.

**Linked Flourish Instructions**

We now have a controlled list of life events, stored in the PFE Flourishes collection. Linking to these from a person's record gives us a greater ability to search and sort life events, while retaining the ability to add dates and some qualifying information in Info 1 and Info 2.

As before, focus on creating flourishes primarily for those individuals about whom it is not possible to find much basic information. The goal is not to catalog every event in a person's life, but to provide at least one data point for as many members of the population as possible.

A list of all of the flourishes currently in the collection is available on Basecamp at https://basecamp.com/1796837/projects/191240workflow/uploads/5767201#comment_105297253. The list of flourishes can also be found by searching the flourish collection in DARMA.

To create a Flourish

! Select "Flourish" in the Link Type Menu

! Select "PFE Flourishes" from the collections list

! Type the desired flourish in the object field - any matching flourishes will appear once you have typed at least three characters. Select the desired Flourish

! Enter the date in Info 1 - always use ISO standard format, just like in the Birth and Death place fields.

! In Info 2, enter any qualifying information you feel is important. The format for this info is less controlled than the dates, because any number of details might be relevant, but try to be *brief* – if you can say it in five words, don't use ten.

! If you come across any major life events which do not correspond with anything already on the list, use the Flourish Info field on the Places/Date tab to note them

! Try to avoid redundancy – if something can be covered by an occupation, relationship or organization link, don't include it as a flourish

**Step 5: Create new Records**

If you don't need to create new records, skip to Step 6 Below.

For Persons:

! Sometimes, the documents will contain information on individuals who did not have their own Index Entry in Rotunda and therefore might not have their own PFE record in DARMA. Our main focus is on filling in those records already in PFE and researchers should not spend lots of time creating new or very detailed records. However, certain records should be created if it can be done quickly and easily, especially those for spouses.

! First, Check for alternate names and duplicate records by searching the Biography and PFE collections and the Rotunda Index. Often, an individual actually does already have a record, but it might be listed as "John Smith (of Albemarle) instead of the name you are searching for, John Smith (1725-1800). Try alternate spellings of names as well, "Jack" for "John" and "Smyth" or "Smithe," etc.

! After verifying that there is no record, click "Create" in the red "DARMA DC" header.

! Enter the person's name and select the appropriate surname collection from the dropdown menu. Click "Create."

! Fill out the new record by following **Workflow Steps 1 through 4** listed above. " For Spousal Records: Enter the spouses name and sex in the Info Tab, and then link the two records with a Family: Spouse link, including the date of the wedding in info field 1.

    " Do not go beyond the boundaries of our period (1713-1815), especially at the latter end.

For new Place Names:

! When you cannot find a location in the Place Name collection, you can create a new record.

! In the DARMA Header, click 'create.'

! Enter the Place Name, following the Settlement, County, State, Country, Bloc* pattern and for collection click Place Names. Here is a sample record: (http://dcdarma.dataformat.com/Display.aspx?id=297962)

    " Before you enter the Settlement, County, State, Country, Bloc* information, look up the location to verify its modern place name. Wikipedia is a decent resource for this. Careful attention is necessary to verify the modern place names, often times Ancestry.com or older genealogical books will list place names that are out of date or simply do not exist. Also, take care to search the place name collection to see if your place name is already in the database, possibly under an alternate spelling (St. for Saint, Newcastle upon Tyne for Newcastle-upon-Tyne, etc.).

! Select "PFE Place Names"

! Click "Create"

! Fill in the Full Place Name, Standard Settlement Name, Standard County Name, Standard State/Province Name, Standard Country Name and Standard Bloc* fields.

Follow the guideline for international places: https://basecamp.com/1796837/projects/257752-research-resources/messages/8006799international-place.

! Do not fill in Lat/Long or Feature ID. We will review these new records and assign them coordinates and feature IDs separately.

! Go to the Workflow tab, and under Workflow Status, select **Needs Review**.
   " If you are looking over an existing record, and there is an error, you can use the Workflow Status of 'Needs Review' to flag a record for review.
   " There is a notes field on each Place Name record. Use this field to record any information regarding a possible issue with the record (such as alternate name spellings or the like).

! Fill in all applicable fields – including counties. This is especially important for townships since a state may have more than one same named township. All townships in PA have already been entered into the database, as well as all US counties, so look thoroughly before making a new record.

! A full guide to the administrative divisions of most European countries is available on basecamp. (https://basecamp.com/1796837/projects/257752-researchresources/messages/8006799-international-place).

! Once you are done creating this new record within the Place Names collection, you will be able to go back to the record you are working on and locate the new place under the birth/death/residence link lookup lists.

! *Bloc is only applicable to places in the United Kingdom. So, for London, the record is called London, London, England, United Kingdom – Settlement, County, NO STATE, Country, Bloc. There are no states/provinces for the UK so it will still be a 4 part name.

## Step 6: Complete the Record

! Go to the Workflow Tab.
! In the Workflow Status field:
   " Select "Ready" for a complete document.
   " Select "Needs Review" if there are problems with the record.
   " Select "Marked for Deletion" if you've transferred links and info to another duplicate record and the current record is ready for deletion.
      - In the Workflow Notes, make a note in the following format. "transferred links and info to record #// initials-date."

! If you're working from a list, go to the Lists Tab, and hit the red "X" symbol to remove the record from your list.

Congratulations! You're done!

4	**Research**

4.1	**Frequently-Used Sources**
	The following is a list of the sources that we have utilized frequently, with their strengths and weaknesses. They are listed by strength of usefulness and accuracy. Google Books is a very frequently used resource and very valuable, however accuracy will vary from book to book.

**ODNB & ANB:** The Oxford Dictionary of National Biography (for Brits) and the American National Biography are both extremely reliable and provide a significant amount of detail. Only a small number of people from our population will appear on these sites – but when they do, ODNB and ANB have all the necessary info. Unfortunately, Documents Compass no longer subscribes to the ANB, but most relevant entries have already been transcribed into a Biography record in PFE.
!	American National Biography (www.Anb.org).
!	The Oxford Dictionary of National Biography (http://www.oxforddnb.com/). This site can be accessed through the UVA library databases collection. You may need a UVA Netbadge account or a VPN.
!	Dictionary of Canadian Biography Online (http://www.biographi.ca/index-e.html) is similarly useful, but we don't have many Canadians in PFE. Many loyalists moved to Canada after the war so keep sources like this in mind when researching British soldiers / loyalists.

**Biographical Directory of the United States Congress**: An official site with brief biographical capsules. Includes Continental Congressmen. Generally has a little more info than Wikipedia, and is less subject to change. (http://bioguide.congress.gov/biosearch/biosearch.asp)
!	**Biographical Directory of Federal Judges**, 1789-present (http://www.fjc.gov/history/home.nsf/page/judges.html)
!	**Biographical Directory of the Maryland State Legislature** (http://www.aomol.net) has similar info for state legislators, though it only runs through 1789. Other states seem not to have similar sources online.

**Wikipedia:** Wikipedia is actually quite reliable for our purposes and most often contains info taken from other websites and databases we use on a regular basis. Nevertheless, it is a website of user-generated data so all data taken from Wikipedia should be critically analyzed. Only a small portion of our population will have Wikipedia pages. It is also a convenient source for info on place names.

Wikipedia pages list sources, which may also be online, so you can expand research outward. Quite often Wikipedia links to databases like **Biographical Directory of the United States Congress** so when those sources are available, use and cite them for a person's object record.

**Find A Grave (http://www.findagrave.com/):** Records which include a photo of the grave can be useful, as they provide a source for the info right on the page. Double-check any info that isn't actually from the tombstone, though. Find A Grave Flowers is fairly useless.

**America's Historical Newspapers:** A database of thousands of newspapers up to 1900, digitized and text-searchable. It is often possible to find obituaries of individuals not prominent enough to show up on Wikipedia – these tend to be better on death place and date than birth. http://infoweb.newsbank.com/iw-search/we/HistArchive/?p_product=EANX&
To limit the results, it's wise to select the time period(s) when a person probably died.

**Political Graveyard (http://www.politicalgraveyard.com/index.html):** A collection of brief biographies of political figures. Includes a wider range of individuals than the US Congress directory, but provides less information than some other sites.
As much of the info comes from anonymous contributors, try to verify with other sources.

**Google Books:** A wide variety of sources are available on Google Books; their historical reliability can vary quite widely. As a rule, books from academic publishers can be treated as fairly reliable. Books of family genealogy are likely to be better-researched than Ancestry.com records. **If they contradict Rotunda, though, use Rotunda's information**.
! Based on the copyright and digitization status of a book, it may be fully available, available for limited preview, or only available in snippets.
! Books are books, so the citations will remain good even if a book is no longer available on Google.
! It is possible to search through the volumes of journals, and multi-volume sets, but they tend to be arranged in no particular order.
! A list of some titles which can come in handy:
! *Herringshaw's National Library of American Biography: Contains Thirty-five Thousand Biographies of the Acknowledged Leaders of Life and Thought of the United States; Illustrated with Three Thousand Vignette Portraits*
! *Historical Register of Officers of the Continental Army During the War of the Revolution, April 1775, to December, 1783 - Francis Bernard Heitman* – This is an excellent source on the military service of every Continental Army officer.
! *Colonial And Revolutionary Families Of Pennsylvania*
! *Colonial families of the United States of America: in which is given the history, genealogy and armorial bearings of colonial families who settled in the American colonies from the time of the settlement of Jamestown, 13th May, 1607, to the battle of Lexington, 19th April, 1775*
! *Legislators of the Massachusetts General Court, 1691-1780: A Biographical Dictionary*
! *The National Cyclopaedia of American Biography*
! *Some prominent Virginia families*

**Archive.org:** Shares many titles with Google Books. May have whole books that Google only previews. However, its search function isn't as effective as Google's.

**HathiTrust Digital Library (www.hathitrust.org)** The HathiTrust contains a large number of digitized books and often includes multiple editions of the same work. This site sometimes proves more helpful than Google books. Not all sources require an institutional login. For those that do, UVA has a subscription to HathiTrust which can be accessed through a UVA Netbadge login or VPN.

**Sons and Daughters of the American Revolution:** These websites tend to have lots of information about revolutionary war veterans; however most of the information comes from family tradition and is user-generated data. Treat these records with the same skepticism as Ancestry.com and private genealogy websites. If a person was an officer in the continental army, corroborate with Heitman's book, noted above. Sar.org and Dar.org

**Geni, Family Tree Maker and private genealogy pages:** These are generally about as reliable as Ancestry.com, minus the latter's large store of primary documents. Citing these sites, especially the private family pages, is risky, as they have a tendency to disappear entirely. If you do use sites such as these, try to corroborate the info with other sources.

**Ancestry.com:** We've used Ancestry.com in the past, but it seems less reliable the more we look at it. It has images of thousands of documents, from census records to Sons of the American Revolution applications – these can be useful if handled carefully. The user-created family trees and person pages should be avoided, though. The information in them is generally not cited and frequently inconsistent or inaccurate, and family trees often disappear when users close their accounts.

! Screen name **sueanddc** Password: **pfe1776**
! Look carefully at the text in documents, because transcriptions may be wrong: one document read "Spotsylvania" twice, but was transcribed as "Rushsylvania" and "Spotswood."
! Never, ever take place names from Ancestry.com. They're more often wrong than right. Check Wikipedia for correct county names, etc.
! Ancestry.com, in its brighter moments, will have source documents loaded into their database. When possible, cite these documents directly instead of the generic Ancestry.com (accessed YYYY-MM-DD).

4.2    **Citation Style Guide**

!    Separate references with a semi-colon, conclude references with a period.

!    List print sources (books, journals, newspapers and magazines) before online sources

!    Books: list alphabetically by author; likewise list those with no author alphabetically

"        Format: First Last, *Title* (YYYY), p. #/pp. #-#

"        Do not abbreviate inclusive page spans (e.g. pp. 293-4 should be pp. 293-294)

"        Multiple volumes: *Title*, vol. #

"        *Example:* Thomas Kemp Cartmell, *Shenandoah Valley Pioneers and their Descendants* (1899), pp. 470-477.

!    Essays in edited volumes: list alphabetically by essay author's name, when possible

"        Format: Essayist First Last, "Title," in *Title*, ed. First Last [when possible] (YYYY), p. #/pp. #

"        *Example*: John D. Kelly, "Seeing Red: Mao Fetishism, Pax Americana, and the Moral Economy of War," in *Anthropology and Global Counterinsurgency*, ed. John D. Kelly et al. (2010), 77.

!    Journals: list alphabetically by author of whenever possible

"        Format: First Last, "Title," *Title*, vol. # (YYYY), p. #/pp. #-#

"        William Seymour, "A Journal of the Southern Expedition, 1780-1783," *Historical and Biographical Papers*, vol. 2 (1896), p. 9.

!    Newspaper articles: make sure to include the title of the paper and the publication date " When possible, include the title or type of article/entry in the citation:

"        Obituary, *Title* (YYYY-MM-DD)

"        Obituary, *The Baltimore Patriot* (1826-02-06).

!    Online Sources: List alphabetically by name of database. Include date accessed; don't include URL or the title of the record

"        Format: Website.com (accessed YYYY-MM-DD)

"        Capitalize titles such as Ancestry.com

"        When the website provides a short title, use it instead of a URL

"        e.g., RootsWeb instead of rootsweb.ancestry.com

"        Abbreviate American National Biography to ANB and Oxford Dictionary of National Biography to ODNB

-        Only abbreviate ANB and ODNB, fully write out other databases like Biographical Directory of the United States Congress.

-        Example: ANB (accessed 2012-04-16); RootsWeb (accessed 2012-04-16); Wikipedia (accessed 2012-04-16).

While we have ANB biography records in our database, we do not have the publishing rights and they will not be presented on the website. Thus, when you refer to information from an ANB biography, make sure you cite ANB (accessed YYYY-MM-DD).

-

5      **Appendices**

5.1    **Match-Combine**

Records with a Match-Combine link need to be combined so that there is only one record.
Follow these instructions to do so.

!      Identify the record with the fewest links.
- "     In the Workflow Status, mark this record for deletion.
- "     In the object box, Add "(DUP)" to the end of the object name of the record marked for deletion, ex; "Smith, John (DUP)".  This ensures people will not add new links before the record is deleted. Any data from this record needs to be transferred to the retained record.

!      Transfer all links from the deleted record to the retained record, paying close attention to the Biographical links.
- "     For Biography records, click on the biography link and go to its link tab. Create an incoming link to the record you are keeping. Remove the incoming link from the record marked for deletion.
- "     For most other links you will just be recreating them in the retained record.

!      Ensure the information from the tabs of the deleted record is replicated in the tabs of the retained record: e.g. Residence places, Birth/Death dates, Aliases, and the canonical URL if there is one (Geography of Slavery records do not have canonical URLs).

!      Return to the Workflow tab and record the following information in the Workflow Notes: Match combine // All links/info transferred - initials- YYYY-MM-DD. In the retained record mark the workflow status as Ready.

## 5.2    Making a Record: Examples

**Example 1- Louis XVIII of France: Unique ID # 54936**
This is an example of a quick, easy to research record. Often times very important figures, such as generals, nobles, or politicians, will have ANB, ODNB, Biographical Directory of the United States, or Wikipedia entries. For this example I found an unfinished PFE entry - **Louis XVIII of France.**

A Wikipedia search reveals a page on Louis XVIII http://en.wikipedia.org/wiki/Louis_XVIII_of_France. Check the information on Wikipedia against the information in the Rotunda Biography to ensure that the Wikipedia article is about the same person as mentioned in Rotunda. If they are the same person, then proceed with the website's article. The box on the right hand side of the page will contain birth and death information. **Next, copy pertinent information into DARMA.**

| Primary Fields | Info | Places / Dates (PFE-only) | Costa | Workflow | Sources | Links (20) | Attachments (0) | Lis |
|---|---|---|---|---|---|---|---|---|
| Full Name | Louis XVIII, King of France (Louis Stanislas Xavier) |
| Generational Name | XVIII |
| Gender | M |
| Faith | |
| Birth Date | 1755-11-17 |
| Birth Date Certainty | high |
| Birth Place link | Versailles, Yvelines, Île-de-France, France |
| Death Date | 1824-09-16 |
| Death Date Certainty | high |
| Death Place link | Paris, Paris, Île-de-France, France |
| Residence Place link | |
| Workflow Status | Ready |
| Record Checked Out By | T. Hiblar |
| Check Out Date | 2013-04-22 |
| Docs Compass Citation | Britannica Online Encyclopedia (accessed 2011-08-22); NNDB (accessed 2013-04-22); Wikipedia (accessed 2012-12-05). (view) |
| Rotunda Canonic URLS | |
| PFE II Rotunda Index Entry | ADMS-index-1-16-1350: Provence, Comte de, later Louis XVIII, King of France (view) |
| Monticello Slave DB | |
| Montpelier Database ID | |

On the <u>Info Tab</u>, **fill in elements of the person's name.** In this case his birth name is Louis Stanislas Xavier. I have Bourbon listed as his surname since that is his dynastic name and his most important surname. These names are quite important to list accurately since our published website will use these fields to identify persons.

| Primary Fields | Info | Places / Dates (PFE-only) | Costa | |
|---|---|---|---|---|
| Full Name | | Louis XVIII, King of France (Louis Stanislas Xavie | | |
| Generational Name | | XVIII | | |
| Gender | | M | | |
| Faith | | | | |
| Faith (uncontrolled) | | | | |
| Old Role Name 1 | | | | |
| Old Role Name 2 | | | | |
| Forename | | Louis | | |
| Forename 1 Type | | | | |
| Forename 2 | | Stanislas | | |
| Forename 2 Type | | middle | | |
| Forename 3 | | Xavier | | |
| Forename 3 Type | | middle | | |
| Forename 4 | | | | |
| Forename 4 Type | | | | |
| Forename 5 | | | | |
| Forename 5 Type | | | | |
| Surname | | Bourbon | | |
| Surname 1 Type | | dynastic | | |

Now, on the <u>Workflow Tab</u>, indicate this record has been researched. In the Workflow Step Status field, mark **Ready.** Also check out the record and add the date.

| Primary Fields | Info | Places / Dates (PFE-only) | Workflow | S |
|---|---|---|---|---|
| Workflow Step | | Research | | |
| Workflow Step Status | | Ready | | |
| Missing Data | | none | | |
| Record Checked Out By | | T. Hiblar | | |
| Check Out Date | | 2013-04-22 | | |
| Deleted/Duplicate Record Notes | | | | |
| Date Added | | 2011-01-01 | | |

Next, go to the Sources Tab - **fill in the appropriate citation.**

| | |
|---|---|
| Primary Fields | Info | Places / Dates (PFE-only) | Costa | Workflow | **Sources** | Links (20) | Attachments (0) | Lists (0) |

| | |
|---|---|
| Docs Compass Citation | Britannica Online Encyclopedia (accessed 2011-08-22); NNDB (accessed 2013-04-22); Wikipedia (accessed 2012-12-05). (view) |
| Docs Compass Notes | http://en.wikipedia.org/wiki/Louis_XVIII // http://www.nndb.com/people/834/000093555/ |
| Missing Role Names | |
| Missing Occupations | |
| Missing Organizations | |
| Missing Flourish | |
| Rotunda Canonic URLS | |
| PFE II Rotunda Index Entry | ADMS-index-1-16-1350: Provence, Comte de, later Louis XVIII, King of France (view) |

Finally, go to the Links Tab and **create the appropriate links for this person.**

The primary occupation for Louis XVIII is King of France and Navarre, so we need to make an Occupation / All PFE Occupations / King link for him. Add the date range in info 1 and the place relevant to 'king' in info 2. Normally date ranges can just be years, but if there is specific or significant reason, record the exact date (in this instance it is very important to note that Louis XVIII was not king from 1815-03-20 to 1815-07-08 – see Napoleon's Hundred Days). We also know he is Comte de Provence, so add that role name as well. The date for info 1 is his date of birth since he was styled such at that time.

## Outgoing Links

| Type | Collection | Info 1 | Info 2 | Target | |
|------|-----------|--------|--------|--------|--|
| Biography | Adams Family Correspondence | | | Provence, Comte de, later Louis XVIII, King of France | 🖊 ✖ |
| Biography | Adams Family Correspondence | | | Provence, Comte de, later Louis XVIII, King of France | 🖊 ✖ |
| Biography | Diary and Autobiography of JA | | | Provence, Comte de, later Louis XVIII, King of France | 🖊 ✖ |
| Biography | Dolley Madison Digital Edition | | | Louis XVIII, King of France | 🖊 ✖ |
| Biography | Presidential Series (PGW) | | | Provence, Louis-Stanislas-Xavier, comte de | 🖊 ✖ |
| Occupation | PFE Occupations | | | Aristocrat | 🖊 ✖ |
| Occupation | PFE Occupations | | | Count | 🖊 ✖ |
| Occupation | PFE Occupations | | | Duke | 🖊 ✖ |
| Occupation | PFE Occupations | 1814-04-11 to 1815-03-20, 1815-07-08 to 1825-09-16 | | King | 🖊 ✖ |
| Occupation | PFE Occupations | | | Royalty | 🖊 ✖ |
| Flourish | PFE Flourishes | | Grand Master of the Order of St. Lazarus | Took holy orders | 🖊 ✖ |
| Role | PFE Role Names | 1755 | de Provence | Comte - Nobility | 🖊 ✖ |
| Role | PFE Role Names | 1814-04-11 to 1815-03-20, 1815-07-08 to 1825-09-16 | of France and Navarre | King - Royalty | 🖊 ✖ |
| Family: Spouse of | M Surnames | 1771-05-14 | Versailles, Paris, France | Marie Joséphine of Savoy (1753-1810) | 🖊 ✖ |
| Family: Brother of | C Surnames | | | Charles X (1757-1836) | 🖊 ✖ |
| Family: Brother of | L Surnames | | | Louis XVI (1754-1793) | 🖊 ✖ |

## Incoming Links

| Type | Collection | Info 1 | Info 2 | Source | |
|------|-----------|--------|--------|--------|--|
| Family: Spouse of | M Surnames | 1771-05-14 | Versailles, Paris, France | Marie Joséphine of Savoy (1753-1810) | 🖊 ✖ |
| Family: Brother of | C Surnames | | | Charles X (1757-1836) | 🖊 ✖ |
| Family: Brother of | L Surnames | | | Louis XVI (1754-1793) | 🖊 ✖ |
| Family: Grandparent of | M Surnames | | | Maria Karolina Zofia Felicja Leszczyńska, Queen of France (1703-1768) | 🖊 ✖ |

'King' only needs to be added as an occupation here. If you click on the occupation of King, under the links tab you will see that it has a 'Maps to' link which connects it to the Role Name of 'King'.

**Example 2- Susanna Angier: Unique ID # 141120**

Look at the biographies record, Angier, Susanna (daughter of Oakes)
http://dcdarma.dataformat.com/Display.aspx?id=131382

This tell us: "The Angiers had three daughters: Mary (b. 1776), Sarah (b. 1780), and Susanna (b. 1783). All three were still living in 1786 (same, 16:7)."

The biographies record tells us that Susanna had two sisters, **Create Family: Sister links between Susanna and Mary and Susanna and Sarah.**

We don't have much information at this point, so examine the document in Rotunda to get a better understanding of Susanna Angier.
http://rotunda.upress.virginia.edu/founders/ADMS-04-07-02-0146

The document tells us that Susanna's mother was Susanna Howard (or Haward) Angier (1751–1793) and her father was Oakes Angier. **Create Family: Daughter links between Susanna Angier and her parents.**

Oakes had an eldest son, which the footnote says was Charles. **Create a Family: Brother Link.**

The document also says "*Oakes Angier's brother was Samuel Angier (1743–1805), Harvard 1763.*" **Create a Family: Niece link to Samuel Angier**.



Wait, there are two Samuel Angier PFE I records. Which is correct? Examine the biographies records linked to the respective PFE I records of Samuel Angier. The biography for Samuel Angier mentions that he is the brother of Oakes, and links to the same document that discusses

Susanna, Mary and Sarah, while the record for Samuel Angier (HC 1787) does not mention the other Angiers. Thus the first Samuel Angier is Oakes' brother.

We have gathered information about Susanna's family from the rotunda document, but nothing beyond familial relations.

A quick Google search reveals a page for Genealogy.com that describes Susanna's marriage and children.

This site tells us that she married Hon. Oliver Ames in 1803 and that they had 8 children. Personalized genealogy websites are not always the most accurate however, so it would be good to confirm this information.

Further research produces a Google books hit, *The New England states: their constitutional, judicial, educational, commercial, professional and industrial history, Volume 1.* – This book confirms the marriage and children of Susanna and Oakes.

Since we now know her married name is Ames, change the full name under the Primary Fields tab to Ames, Susanna Angier. Also change the record name. Change the name of the attached biography record as well.

If you change a person's last name, make sure they are still in the right collection of surnames within PFE. Angier to Ames is still within '– A surnames.'

We have created a lot of familial data for Susanna, but relatively little in the way of life/death dates/places or occupational information. Next I did a more refined Google Books search for Susanna Angier Ames – we now know her married name. This produced more hits, but most refer to her as the mother of one of her children. One record, however, does mention that she lived from 1783-1847, and born in Easton, MA – this is consistent with the birth date provided by Rotunda.

**Enter the birth and death dates and birth location into DARMA under the Primary Fields Tab**. Since Rotunda can confirm the birth date, and genealogy books on Google books are generally reliable, **mark the certainty high.** Unfortunately, in this instance, we can only see snippets from this book (the full text is not available through Google Books) but enough data is available to use the information and create a citation. Since we know she was born in Easton, we can identify in which county she was born via a quick Wikipedia search.

| Primary Fields | Info | Places / Dates (PFE-only) | Workflow | Sources |
| --- | --- | --- | --- | --- |
| Full Name | Ames, Susanna Angier | | | |
| Generational Name | | | | |
| Gender | F | | | |
| Faith Controlled | | | | |
| Birth Date | 1783 | | | |
| Birth Date Certainty | high | | | |
| Birth Place link | Easton, Bristol County, Massachusetts, United States | | | |
| Death Date | 1847 | | | |
| Death Date Certainty | high | | | |
| Death Place link | Easton, Bristol County, Massachusetts, United States | | | |
| Residence Place link | | | | |
| Record Checked Out By | T. Hiblar | | | |
| Check Out Date | 2013-04-22 | | | |
| Docs Compass Citation | Ann Theopold Chaplin, Descendants of William Ames of Braintree, M educational, ... [view] | | | |

PFE II Canonic URLS

While doing further research on this family I discovered Susanna's death place and entered it. Now that we have used two different Google books as sources, these need to be cited under the author. Use the **Citation Style Guide**.

Ann Theopold Chaplin, *Descendants of William Ames of Braintree, Massachusetts* (2004), p. 442; William Thomas Davis, *The New England states: their constitutional, judicial, educational, commercial, professional and industrial history,* vol. 1(1897), p. 376.

Workflow Tab
Check out the record to yourself.
Select **Ready** on Workflow Status.

5.3 **Types of Fields in DARMA**
Date: Must be entered in the format YYYY-MM-DD to be processed correctly. To indicate uncertainty, you can include "c.", "Before", or "After" prior to the date. To indicate a date range
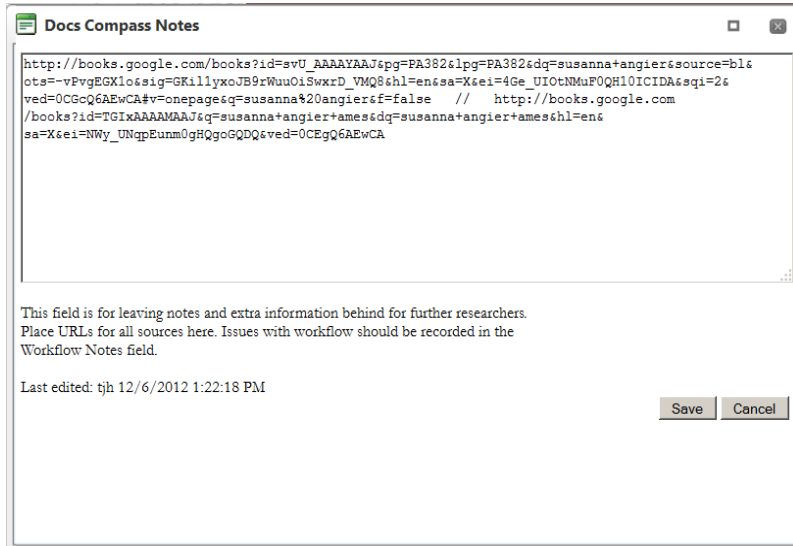
or multiple possible dates, use the format "YYYY to YYYY." *No other formats will work correctly*.

**Short Text:** Allows you to enter a small amount of text, but does not allow for formatting.

**Freeform Text:** The same as Short Text, but you can enter more characters. Distinguishable because the text window is larger; you cannot use enter to create line breaks in the Freeform Text box.
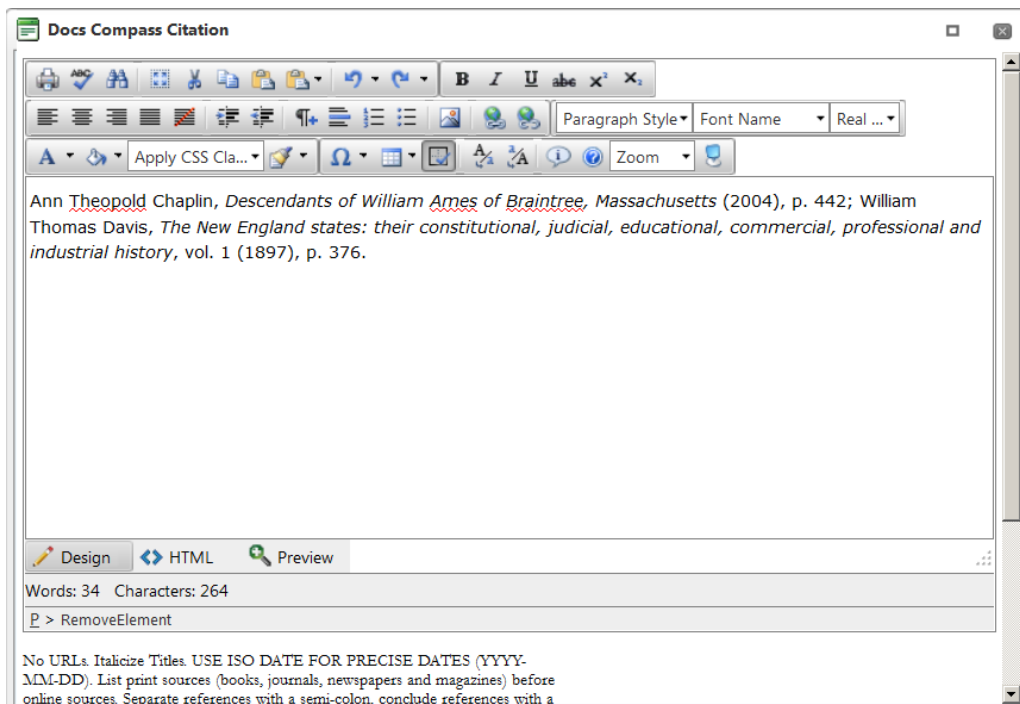


**XHTML Text:** This field brings up the full text editing window, including formatting options and the ability to view and edit the HTML tagging.

**Dropdown List**: A list with a small number of options to choose from. Only one can be chosen.



**Lookup List:** A list with (sometimes very, very) many options. Start typing the item you're looking for, select it when it comes up, and click the plus sign. You can add more than one item to these fields.