# PowerUp SIG February 14, 2017: Data Standardization

# Names

To standardize or not to standardize? That is the question. There are good reasons both for and against. What do you do? If you do standardize, what standardization do you do and not do?

Note: Research and examples herein are based primarily on Family Tree Maker.

Do you use the same preferred spelling for everyone in that family or line, or do you change it based on the supporting records?

# Name fields (AKA, Alternate Name, non-preferred Name)

What name(s) do you enter in each type of field?

Data to Enter	Preferred Name (1 ✓ only)	Non- preferred Name	AKA	Alternate Name	Do Not Enter
Full, first-middle-last maiden name					
Full, first-middle-last married name					
Married name (if you use maiden name for preferred name and maiden is already listed)					
Name with first and/or middle initial from new source if full name is already entered					
Nickname					
Alternate spelling					
Completely different alias					

### **Punctuation**

- Use period after initial? Title? In suffix?
- Use comma before suffix?
- Use punctuation within suffix?

#### **Unknown Names**

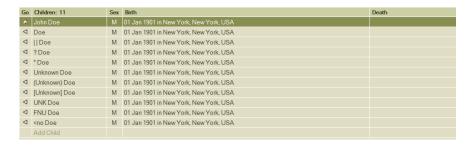
#### Web Search

- How you enter unknown names can affect how they sort, how easy they are to identify, and how they affect Web Search.
- Web Search ignores information in the Suffix field of the Edit Name box.



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**Web Search** appears to ignore most special characters, including all braces and brackets, the pipe, and backslash<sup>1</sup>, even if they are in the First Name or Last Name field.



- Best choice: First (and Middle, if known) and Last Name
- 2<sup>nd</sup> choice: Spaces and special characters only (other than wild cards such as ? and \*), or blank first and/or last name. I use:

```
First name: pipe space pipe
Last name: backslash space backslash² \\
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• 3rd choice: One or two words or abbreviations to indicate an unknown name, first name, or last name. Unless specifically edited, a single word or abbreviation for a new person with no father defaults to the last-name position.

Since special characters except for specific wild cards are ignored, any word or abbreviation containing letters, whether containing special characters or not, is treated as an actual name and skews the search.

•	FNU LNU	Searches for FNU LNU
•	First Last	Searches for FIRST LAST
•	<no name=""></no>	Searches for NO NAME
•	UNK	Searches for UNK
•	(Unknown)	Searches for UNKNOWN
•	[Unknown]	Searches for UNKNOWN
•	Unknown	Searches for UNKNOWN

Note: Typing <No name> is not the same as downloading <No name> in a search, such as for the parent of the subject in a census search. FTM treats the downloaded version differently than the typed version in a search.

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<sup>&</sup>lt;sup>1</sup> From FTM Help: **Unknown suffix.** Family Tree Maker is programmed to recognize most suffixes, such as "Ph.D.", but there are some that it won't recognize. To ensure that the suffix is recorded as a suffix and not the last name, **use backward slashes to indicate the last name**, then type the suffix after the closing slash. [Ed: Bolding is mine.] Samuel Jasper \Adams\ Ph. D.

Eliza Emmanuella \Della Bocca\ M.D.

<sup>&</sup>lt;sup>2</sup> Ibid. I chose two backslashes with a space between them to indicate the last name, specifically because FTM does recognize them as marking the last name. I use pipes with a space for the first name because backslashes in the First Name field might cause errors in the database and because they provide a visual difference from the backslashes.

 The question mark and asterisk are wild cards. Used alone as a name, they are likely to return too many results to show.

## Make an Unknown Name easier to identify in the index

I may not have the best choice for special characters to use for an unknown name, as FTM sometimes rearranges the characters without my help. However, I definitely find using the suffix field to identify the unknown person extremely helpful.

| | \ (relation of name)
Note: I found the use of the suffix box in a blog online, but I can't remember which one.

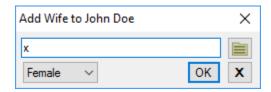
The pipes and backslashes I came up with myself to avoid affecting Web Search.]

#### Examples:

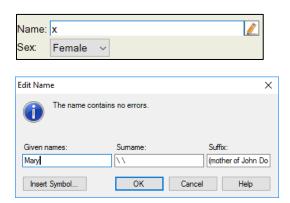
- o | | Smith (husband of Sarah Smith)
- John \\ (1st husband of Sarah Smith)
- | | \ \ (wife of John Jones)

#### To enter a new name:

1. Temporarily type anything in the initial Name box.



Click in the Name box, click the pencil at right, and enter the name in Edit Name. Sometimes it's necessary to repeat the process to get the name parts to stay in the appropriate boxes in Edit Name.



To modify an existing name, click in the name field and click the pencil at the right end of the box. Then proceed as above.

#### Index sort, based on choice of unknown name designation

In the Index lists below, unknown names appear in different positions based on the choice used. Do you want unknown names to appear at the top or alphabetically based on first letter of the choice?

The automatically created <No name>, 1, sorts differently than a hand-typed <No name>, 2, when sorted by Family name, Given name.

