

Notes on PediTree CSV Import

1. Starting a One-Name Study in PediTree.

- a. As a member of the 'Guild of One-Name Studies', I believe that PediTree is the best programme available for undertaking a One-Name Study. This talk is based on my article in the latest edition of the 'PUG Newsletter'.

2. Introduction

- a. Good morning, my name is Rod Clayburn.
- b. I am a committee member on Pedigree Users Group. I also undertake various committee works for the Guild of One-Name Studies.
- c. I have used Pedigree since 1986 and converted to PediTree.

3. Introduction

- a. I shall be showing you how I would start up a One-Name Study if I were beginning today.
- b. I was investigating a quick way for members of the Guild of One-Name Studies to start a fresh One-Name Study. What better way to start than with PediTree / PediTree as I did!
- c. However, importing data into Pedigree was rather tortuous if you did not have it in GEDCOM format.
- d. My initial 1986 imports were in CSV format from tables of Births, Marriages and Deaths that I had collected.
- e. On changing over to PediTree, the CSV import facility was not available; I discussed this with Murray Kennedy and Colin Liebenrood — now they have now added the CSV import facility to PediTree.

4. Introduction

- a. I shall progress as far as I can, then Murray will take over and hopefully correct or improve on my methodology!

5. Topics of Discussion

- a. What do I require?
- b. Where to obtain the data?
- c. How to prepare data prior to importing into PediTree.
- d. How to import into PediTree.
- e. So, the topics will run from "Where do I obtain my data?" through preparing the data and finally "Importing data into PediTree"

6. What do I require?

- a. Before starting to compose a One-Name Study, the 'Ideal' would be to have already loaded into PediTree, a complete set

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of Births, Marriages, Deaths, IGI, Census Returns, Wills etc.

7. Placement Inside PediTree

- a. In this 'Ideal', each of these databases would be a separate entity. However, the present structure of PediTree limits what can be achieved in this respect. The basic task will be to load a combined BMD database for import into the SOURCE record type for reference purposes.

8. One-Name Study

- a. In order to kick-start a One-Name Study, you could also create a Birth database for import into the PERSON record type. In order to kick-start a One-Name Study, you could also create a Birth database for import into the PERSON record type

9. One-Name Study

- a. This could be repeated for MARRIAGE and Death records from the GRO.

10. One-Name Study

- a. Maybe followed up with CENSUS, IGI, WILLS etc?

11. Where to obtain the data?

- a. My own personal choice for starting out is to download from FreeBMD. I shall start by showing you the FreeBMD search page.

12. Where to obtain the data?

- a. Please use the FreeBMD website, not the database available through Ancestry.

13. Where to obtain the data?

- a. I shall start by showing you the FreeBMD search page.

14. "FreeBMD Search"

- a. You can see that I have entered the search CLAB*N* with wildcards.
- b. Highlighted 'All Districts' and 'All Counties'
- c. Then I set dates from 'Sep 1837' up to 'Dec 1930'
- d. This should bring up most of the variants I require to know. Of course the FreeBMD databases are not yet fully complete and a recheck will be required later.

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15. "Downloading the results"

- a. We now have to download all our results.
- b. This is achieved by using the download button - circled in blue.

16. " Offer is to 'Open' or 'Save' file.

- a. Choose 'Open' and it should open in Notepad" This is the default way to open the download file.

17. "You may then save as a text file"

- a. You will be offered the choice of opening the saved file Clabxnx.txt.. This should be taken; my default is to open in Notepad.

18. "Highlight the event data only"

- a. Highlight all the required text results only.
- b. You will see that the event column contains Births, Marriages and Deaths.
- c. Do not highlight the column headings

19. "Copy from Notepad"

- a. Right click or use drop down menus to copy text.

20. "Paste into Excel as 'Text'

- a. "Open an Excel Spreadsheet.
- b. Paste your results into Excel using the 'Paste Special' option and selecting 'text'.

21. "An alternative is to open direct into Excel and crop extraneous data there"

- a. Murray suggest and alternative method. That is to open the saved file directly into Excel. Then crop out lines above and below the data that are not required.

22. "Save Excel file as Clabxbx from FreeBMD.xls"

- a. Save the Excel Spreadsheet with name of choice.

23. Use the Excel Spreadsheet to Manipulate your data in order that it is ready for importing into PediTree

- a. Use the Excel Spreadsheet to manipulate your data in order that it is ready for importing into PediTree.

24. "Insert a blank row at the top"

- a. Start by adding column titles

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25. "Add the column headings and enhance the text"

- a. Add the column headings and enhance the text with borders and colour.

26. "Highlight 'Surnames' only and copy"

- a. Highlight the 'Surnames' only and copy.

27. "Paste as 'Unformatted Text' into a Word processor"

- a. Paste as 'Unformatted Text' into a Word Processor — I use MS Word

28. "Change case to 'UPPERCASE' and copy"

- a. Change case to 'UPPERCASE' and copy

29. "Return to Excel and paste back as 'Text'"

- a. Return to Excel and paste back as 'Text' using 'Paste Special'.

30. Add the Autofilter option

- a. We then require to add the 'Autofilter' option. Using the drop down menu, Data, Filter, Autofilter. This allows us to find mismatched registration districts etc.

31. Use the 'Autofilter' facility to look for errors"

- a. Add 'Autofilter' data facility and search for errors that can be corrected.
- b. You may have to look up the BMD images on Ancestry or FindMyPast to double check.

32. Make corrections — This district was 'Norwich'

- a. Make corrections — this entry was actually Norwich when checked against images of indexes from Ancestry.

33. What should be changed or added?

- a. So what should be modified to make ready for PediTree import?

34. First stage — the date format

- a. First stage is to make the 'Date' format compatible with PediTree.

35. Change 'Quarter' format

- a. Change quarter format with 'Replace' edit tool.
- b. Change each quarter individually - Mar to Q1 etc.

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36. Add 'Date' column and Insert a CONCATENATE formula to merge 'Quarter' and 'Year' columns into 'Date'

- a. Use the CONCATENATE formula to merge quarters and years into a single date format.

37. Copy date formula and paste into other date cells

- a. When you have the correct CONCATENATE formula, copy this cell and paste into the remaining 'Year' cells as a 'Formula' only.

38. Second stage - add the sex

- a. Second stage is to add a sex to each entry.

39. Insert 'Sex' Column and sort on 'Forename[s]'

- a. Insert 'Sex' Column and sort on 'Forename[s]'. This makes it easier to sort the males and females.

40. Copy and paste 'F' into 'Sex' column for all female entries

- a. Copy and paste 'F' into 'Sex' column for all female entries

41. When all female entries completed, sort on 'Sex' and fill all blanks with 'M'

- a. This is the easy way of adding males.

42. Third stage - enhance the source reference

- a. Third stage is to enhance the 'Source' reference

43. Enhance the 'Registration District' entry.

- a. Insert an extra column and use formula to add a description.

44. Add a 'GRO Reference' column, merging 'Event', 'Volume' and 'Page' data

- a. Add a 'GRO Reference' column, merging 'Event', 'Volume' and 'Page' data

45. One further stage you may wish to consider.

- a. Now that you have the data tidied up, it would be useful for later to make up individual Excel Sheets for the Births, Marriages and Deaths.

46. Use the 'Autofilter' to select Births in the 'Event' column.

- a. Use the 'Autofilter' to select Births in the 'Event' column.

47. Copy to Sheet2

- a. Manually, that is with the pointer, select all the exposed cells. Copy them and move to Sheet2.

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48. Select cell 'A1' and 'Paste Special' as values only.
 - a. Select cell 'A1' and 'Paste Special' as values only.
49. After tidying, you now have a set of 'Births' with 'Mothers Maiden Name' where given.
 - a. Don't forget to make the Mother's Maiden Surname uppercase if you did not during the initial work.
50. If required — repeat this exercise for the 'Marriages' and 'Deaths'
 - a. If you think this is a good idea, then repeat it for 'Marriage' and 'Death' entries.
51. You should now be in a position to start experimenting with PediTree CSV importing
 - a. Are we ready to import the data? No quite, it is better if the data columns that are not required are removed.
52. Name Sheet1 'MASTER' and Sheet2 as 'TRIAL1'.
 - a. Name Sheet1 'MASTER' and Sheet2 as 'TRIAL1'.
 - b. Copy all of MASTER to TRIAL1 as VALUES only, this removes the formula content of each cell.
53. On TRIAL1 Sheet, delete all the columns that are not required for import to PediTree.
 - a. On TRIAL1 Sheet, delete all the columns that are not required for import to PediTree.
 - b. Obviously I have not shown all the variations you can make, that would be a personal choice.
54. Save 'TRIAL1' sheet as an MS DOS .csv file.
 - a. Save 'TRIAL1' sheet as an MS DOS .csv file. You will be told that only one sheet at a time may be saved in this format — no problem.
55. Open the .csv file with Notepad or similar text editor and check that it has comma-separated values [CSV] ready for PediTree.
 - a. Open the .txt file with Notepad or similar text editor and check that it has comma-separated values [CSV] ready for PediTree.
56. "Content should look like this"
 - a. It should look like this, note the commas between the data.

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57. Open up your copy of PediTree and select a new blank database. In this instance we shall call it 'CLABXNX'.
 - a. Open up your copy of PediTree and select a new blank database. In this instance we shall call it 'CLABXNX'.
58. Use 'File', 'Import', 'CSV' and select the csv file from where you have placed it.
 - a. Use 'File', 'Import', 'CSV' and select the csv file from where you have placed it.
59. Do not forget to use PediTree in updating mode.
 - a. Do not forget to use PediTree in updating mode.
60. To import as a SOURCE, select source fields to match data available.
 - a. Import as a 'SOURCE', select source fields to match data available.
61. Import ready
 - a. Import is ready; you will note that some of the fields available in the GRO BMD Index do not match a source record. In this case I shall just use a text field. There is probably a better way and I shall ask Murray to advise.
62. Create a SOURCE Index.
 - a. Create a 'SOURCE Index' by selecting List, Index Create and Source.
 - b. For this example I shall select type, date and refnum.
63. This is a view showing the SOURCE Index in Birth, Death and Marriage order.
 - a. This is a view showing the SOURCE Index in Birth, Death and Marriage order. I am sure that you all can manipulate the PediTree system to produce what you require.
64. Over to Murray Kennedy who will explain more!
 - a. Over to Murray who will tell you were I went wrong and how to improve the import.