



Genealogy/Directory

DATABASE MANAGEMENT

UPDATED 2.6.2026

DATABASE OVERVIEW

Each person has a unique id. This allows a person to be referenced in multiple places. The same person can be a spouse or parent to multiple people. Keep in mind that changing a person's name for example will change it in all the places where that person is referenced.

This provides consistency to the printed books so that a man named William is printed as such everywhere even though some of his children wrote on their forms that his name is Bill.

Residences (addresses), churches, and church communities also have unique ids that are referenced in multiple places.

Deleting any of these will delete it in all places.

Deleting William will set any of his children's Father to none and will remove any marriages.

DESCENDANTS OF BETSY

1 Betsy Smith
 b. July 3, 1891 at KS, d. Nov. 2, 1985, dau. of John G. and Mary (Troyer)
 m. July 8, 1909 to **Robert D. Smith**
 b. Jan. 21, 1872, d. June 3, 1949

CHILDREN	BORN	DIED	SPOUSE
1.1 Mary S.	03-08-1911, KS	02-25-1993, KS	Joseph H. Bontrager
1.2 Joseph S.	02-20-1913, KS	03-15-2002, CO	Ida D. Bontrager
1.3 Savannah S.	02-20-1916, KS	03-23-2004, KS	Joe D. Beachy
Edna	12-12-1918	01-04-1919	
1.5 Rhoda S.	03-03-1923, KS	06-27-2013, IN	Noah A. Troyer

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 Retired Farmer
 4225 E Longview Rd, Haven, KS 67543

CHILDREN	BORN	DIED	SPOUSE
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1.1.1.2 Vernon Jay	08-27-1959, KS		Cynthia D. Loyd
1.1.1.3 Elmer Dean	09-07-1962, KS		Rosanne C. Beachy
1.1.1.4 Carol Ann	11-06-1966, KS		David Lee Smith

RULES

When the information to enter and the information already in the system conflicts, consider what that information is. If the conflict is a residence, occupation, or church, the system should simply be updated. If the conflict is a name or date, the information in the system **should not be changed**, but can be **marked as a discrepancy**. It is the proofreader's job to note these conflicts.

The general rule is to not enter punctuation in fields.

WHICH INFORMATION TRUMPS?

Database trumps old books.

Database trumps handwritten forms, except occupations, church, address, and phone numbers.

Populated forms trump database.

CREATE A PROJECT

- ✓ **go to Customer Projects from job UI** — This goes to the projects page filtered by the Customer
- ✓ **change project type and create project** — set info in the project including primary person ID
- ✓ **enter project** — edit beside the project list
this lets the system know which project you are working on and This is necessary to track orders and discrepancies on a project basis as well as assign stories to the correct projects automatically.

GENEALOGY ENTRY

- ✓ **search for primary descendant**
enter performs search

It may be wise to use as little information as possible to search. **Name and birth year is generally the right amount when searching for a person.** This allows the person to be found even if his information has been entered incorrectly previously.

- ✓ **add additional info**
if found, edit
if not found, insert as new

If the name in the system is a shortened version, Dan for example, and the new information says Daniel, it would be appropriate to update the system to Daniel. If the name is significantly different, use the alternate name option at the top selecting add new alternate name. Enter the name to use for that specific project only and select the project name.

RESIDENCE

enter as new

FATHER AND MOTHER

Search for the father. The system will search automatically after tabbing out of the birth last name field. The list is filtered based on a person's age in relation to the potential parent. Selecting a person from the list will automatically bring that person's current spouse in as the mother.

If the father is not found, use insert as new person. Check the "Add Marriage For Parents if one doesn't exist" box to marry the parents together. Unless it is specified that the parents were not married.

Search for the mother and insert her as a new person.

SPOUSE

Search. Select or insert as new.

- ✓ **save and edit spouse**

This information is unique to the spouse. It is not necessary to enter the extra information and the primary phone again.

TIP: use the "Lives with spouse" button to pull in the residence automatically.

- ✓ **save and insert children**

Only unmarried children are entered on this form. Unmarried children living at home do not get a residence

For married children, it is important to **search first before entering.**

TIP: use Save and Insert as New using Info from (last person saved) This will add the parents to the inserted person.

clicking on person ID

opens that person, so leaving the family page open as a tab is a quick way to move along from form to form

The screenshot shows a web-based genealogy form. At the top, there are navigation links for "Main Menu" and "Add/Find Person". The main section displays a person's profile with fields for "Father ID" and "Mother ID", each with a "Search" button and a list of potential matches. Below this, a section titled "Existing Children of Matthias Paul Beachy AND Andrea Rachelle Beachy (Hershberger)" lists four children with their names, birth dates, and birth locations. At the bottom, there is an "Add Child" section with a list of parent information preferences and a form for entering a child's details, including first name, middle name, prefix, suffix, birth date, and death information. The name "Carlisle Printing" is visible in the bottom right corner of the form.

ADDITIONAL DIRECTORY ENTRY

- ✓ **add a church community** — main menu / church communities / add new
- ✓ **add new churches** — main menu / church / add new
assign the church to the correct community
- ✓ **codes** — Child codes for directories are generated based on the data. There are different code sets that can be used.
The following are the most common codes and notes regarding how the database thinks about generating codes.
 - A. SINGLE AMISH, LIVING WITH PARENTS**
 - » no spouse
 - » Is Amish, checked
 - » no address (setting in template to assume same as parents)
 - B. MARRIED, AMISH LISTED IN THIS DIRECTORY**
 - » has spouse
 - » Is Amish, checked
 - » has a church in this directory
 - C. MARRIED, AMISH, NOT LISTED IN THIS DIRECTORY**
 - » has spouse
 - » Is Amish, checked
 - » not in a church in this directory
 - D. NO LONGER AMISH**
 - » Is Amish, not checked
 - E. SINGLE, AMISH, NO LONGER LIVING WITH PARENTS**
 - » no spouse
 - » Is Amish, checked
 - » residence ID different than parents
 - S. SPECIAL NEEDS**
 - » Special Needs, checked
- ✓ **follow genealogy instructions** — both husband and wife should be assigned to church, if a child is to have his own listing in the directory, he needs to be assigned to the church as well and must have a different residence ID than his parents

FIELD SPECIFIC RULES

✓ Names

Multiple middle names can be entered in the middle name field.

Two capital letters such as JD will be punctuated as J.D. automatically when printed. A two letter name such as Jo will not be punctuated. Capitalization is important.

Current last name is for a married woman's additional last name.

Birth last name is the maiden name and does not change.

Jr should be placed in the suffix field.

A woman's current last name should reflect her most recent marriage.

✓ Twins

Add numbers to the hour field for the sort order.

TIP: *to import (twin) or (triplet) in the child listing, simply enable the Multiple Births field on the settings page*

✓ Stillborn

Check "Is Stillborn."

Only enter the child's name if known, otherwise leave blank.

Enter birthdate (death date can be skipped)

✓ Date Fields

0000 can be entered in any year field when the date is unknown.

TIP: *When a couple is divorced, but no date is given, enter 0000 in the ended year field in the marriage section.*

TIP: *Negative numbers can be used to sort children order correctly when the date is unknown. The number will be treated as though it is not negative in the sort order. These numbers will not print*

✓ Birthplace, Deathplace, Married Place

City and state is preferred. County and state is acceptable.

Country is not required unless it is the only information given.

Enter comma between city and state: *Goshen, IN* or between county and state: *Holmes County, OH*

Do not enter Hospital or Carecenter or their names

✓ Occupation/Workplace

Use occupation field. (workplace field is used only for special projects)

Use a pipe "|" between multiple occupations. No spaces. Like this: Carpenter|Farmer

Use the singular noun form whenever possible.

Mason not masonry. Roofer not roofing. Woodworker not woodworking.

Use homemaker instead of housewife, at home, mother, etc.

Use Self-employed rather than self employed.

- ✓ **Extra (Church Information)**
 - Add church information in the extra field for genealogies.
 - If an Amish church number or Bishop name is given as the church, simply enter Amish.
 - Use Non-denominational rather than nondenominational.

- ✓ **Location**
 - Unknown-(anything you like) can be used in the address line 1 and will not import

- ✓ **Married by**
 - Enter only a person's name unless only one name is given with title such as Reverend or Pastor preceding it.
 - Enter "John Doe" if info submitted says "Reverend John Doe".
 - Enter "Pastor Troyer" if submitted says "Pastor Troyer" (no first name given).
 - Do not enter anything if only title given.

- ✓ **Stories**
 - Add stories to descendant.
 - Make minor edits.
 - Correct grammar and punctuation.
 - Spell out month and day names.
 - Numbers under 10 should be spelled out.
 - NOTE:** *Stories must be assigned to projects to be included in an import. When entering the database through the edit button beside the project, that project is auto-selected for any story added.*

- ✓ **Gaurdianship**
 - Use to assign "parents" when not biological.

STEPS

✓ Data Entry

create project
find/enter primary descendant
import standard template
update to suit
enter data

✓ Design Proof

a design proof can be made prior to all data entered
if using standard template, find matching indesign file here:
z Indesign Templates/Genealogies/Standard Book Templates
import
revise any project settings and indesign template
send first 12-16 pages for design proof
include letter explaining incomplete data
example here: z Indesign Templates/Genealogies/
Letterhead . Genealogy Design Proof.indd

TIP: set project settings to max generations "2" for a quick test

✓ Proof to Proofreader

after all data entered, import for proofreader

- » mark proofread, locked, and confirmed text with appropriate character styles
- » include object IDs/barcodes for testing purposes
- » include project order quantities when we are tracking those

TIP: before sending to proofreader, ensure all data needed is included. For directories, compare member list to ensure correct households are included.

✓ Make changes

when making proofreader changes, mark items as discrepancies rather than changing data for orange and green fields

✓ Proof to Proofreader (round 2)

import

- » mark discrepancies with "Discrepancy" character style

✓ Send Discrepancy Letters

We contact people directly regarding discrepancies with the most direct person. If the discrepancy is on a married child, we send the letter there rather than to his parents.

use template to create letters:
/Volumes/CarlisleFile/Carlisle File/z Indesign Templates/
Genealogies/Discrepancy Letters.indt

import

- » include only listings with discrepancies
- » remove listings as needed

mail letters
print extra copy to send with proof to customer

✓ Proof to Customer

import

COLORS

(DEFINITIONS FOR TYPIST)

- The information has been used in 1 or more proofread projects.
These fields can be edited by right clicking and choosing Carlisle Interface Settings / Enable for Editing.
- The information has been used in 3 or more proofread projects.
Can only be edited with administrator access.
- The person has confirmed their information as correct.
This information should never be changed.

COLORS

(DEFINITIONS FOR PROOFREADER)

- **Proofread and mark changes.**
Black text indicates new information. Addresses always print black.
- **Proofread and mark changes.**
Information has been used in 1 or more proofread projects.
- **Scan briefly and mark changes.**
Information has been used in 3 or more proofread projects.
- **Do not proofread.**
The person has confirmed their information as correct.
- **Do not proofread.**
There is conflicting information that has already been used and proofread on a previous project. The typist/designer will send out forms directly to the person to settle conflict.

SETTINGS FOR IMPORT

Take a deep breath and move slowly through the settings page!

It is very powerful and allows for the data to import into InDesign in nearly any arrangement.

TIP: when setting up import into InDesign, it is helpful to set the import to "All one file" and limit the import to 2 generations. This will speed things up significantly.

✓ Settings Templates

Project settings can have multiple templates (think Design A and Design B for design proofs)

There are standard templates that can be imported and used.

The standard templates have matching InDesign Files.

Carlisle File/z InDesign Templates/Genealogies/Standard Book Templates

The active template is used automatically when importing.

✓ Included Relations

note that the Marriage List order affects who the current spouse is.

✓ Markup

use the following to insert special characters in the prefix and suffix fields

<SPACE> = space	<EM_SPACE> = em space
<NEWLINE> = paragraph return	<EN_SPACE> = en space
<BREAK> = forced line break	<EM_DASH> = –
<PAGE_BREAK> = page break	<EN_DASH> = -
<COLUMN_BREAK> = column break	<TBR> = tab or if text is not able to fit on a single line, then forced line break + tab
<BULLET> = •	<TBRT> = tab or if text is not able to fit on a single line, then tab + forced line break + tab
<AMP> = &	
<TAB> = tab	

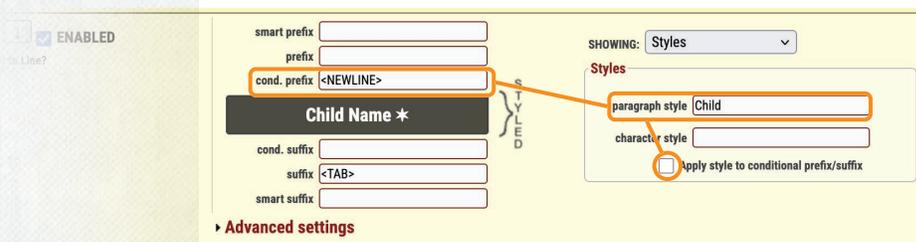
✓ Styles

name inserted in field connects to InDesign Paragraph and Character styles

if style doesn't exist in InDesign file, it will be created. If a matching style exists in the InDesign file, it is used, else a new style is created.

TIP: Styles will not match when they are inside an InDesign style group.

NOTE: When a <NEWLINE> is being added before a field, the paragraph style should not apply to it, else the previous paragraph can get an incorrect style applied to it.



- ✓ **Conditional Prefix / Suffix** — only added when the field has a value,
for example, if a child didn't have a birth date,
conditional prefix or suffix would not import
- ✓ **Prefix / Suffix** — added every time, regardless of whether a field has a value
for example, a prefix or suffix would import
regardless whether or not a birthdate existed
- ✓ **Smart Prefix / Suffix** — added when conditions defined are matched
only enabled fields in same group are listed
think of it as an include if statement, such as **include if any** of
fields marked any have a value **and all** of the fields marked all
have a value **and all** of the fields marked none have no value
in this example, a Forced Line Break would be inserted before Spouse
Name when there either Spouse Name or Location has a value

ENABLED
Fit to Line?

smart prefix <BREAK>
prefix
cond. prefix

Spouse Name *

cond. suffix
suffix
smart suffix

STYLING

SHOWING: Smart Prefix Options

Smart PREFIX Conditions
The smart prefix text will only output when these conditions are met.
Conditions Help

field name	ignored	any	all	none
Is Adopted Indicator *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Name *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Birth Date *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Code *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is Stillborn *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Death Date *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spouse Name *	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Location *	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advanced settings

- ✓ **Smart Hide** — functions like smart prefix / suffix but hides the
field value when conditions are met
for example, it can be used to hide Death Date when Is Stillborn

ENABLED
Fit to Line?

smart prefix
prefix
cond. prefix

Death Date *

cond. suffix
suffix
smart suffix

DISPLAY

SHOWING: Smart Hide Options

Smart Hide Conditions
This field will be HIDDEN when these conditions are met.
Conditions Help

field name	ignored	any	all	none
Is Adopted Indicator *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Name *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multiple Birth *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Birth Date *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Code *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Church Number *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is Stillborn *	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Death Date *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spouse Name *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Location *	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Advanced settings

- ✓ **Text Variables** — There are a number of variables that can be used in InDesign
after the import has been completed. This is most useful when
importing "Each section as a File". Then Section Name can
automatically put the church name and number on a parent page.
In a genealogy, there is a field "Section Title
Name Format" which determines how the name is
formatted for the Section Title text variable.
- ✓ **Parent Pages** — Can be set in the settings page so that Divider Section,
Text Section, and Index all import using different
parent pages found in the InDesign file

RENDER TYPES

* Fields

Outputs the data of the corresponding field/s.

In some cases, a field renderer combines multiple field data, for example, Child Name can combine first, middle, last, prefix, and suffix fields depending on the advanced settings used.

Other fields, such as Multiple Birth, Number, and Child Code are calculated.

▮ Lists

No direct output. Repeats for each item.

For example, the Child List includes all the children in a marriage.

▮ Groups

No direct output. Used to group field and lists.

For example, while the Child List correlates means all the kids from a particular marriage, the Child Group is for each child and groups together Child Name, Birthdate, Spouse, etc.

The screenshot displays a vertical stack of field renderers, each with its own configuration panel. The renderers shown are:

- Children Of Line ***: Includes fields for cond. suffix, suffix, and smart suffix.
- Child List :**: Includes fields for smart prefix, prefix, cond. prefix, cond. suffix, suffix, and smart suffix. A "STYLED" label is present.
- Child .:**: Includes fields for prefix (set to <NEWLINE>), cond. prefix, cond. suffix, and suffix. A "STYLED" label is present.
- Number ***: Includes fields for smart prefix, prefix, cond. prefix, cond. suffix, suffix (set to <TAB>), and smart suffix. A "STYLED" label is present.
- Is Adopted Indicator ***: Includes fields for smart prefix, prefix, cond. prefix, cond. suffix, suffix, and smart suffix. A "STYLED" label is present.
- Child Name ***: Includes fields for smart prefix, prefix, cond. prefix, cond. suffix, suffix, and smart suffix. A "STYLED" label is present.
- Birth Date ***: Includes fields for smart prefix, prefix (set to <TAB>), cond. prefix, cond. suffix, suffix, and smart suffix. A "STYLED" label is present.
- Birthdate ***: Includes fields for smart prefix, prefix, and cond. prefix (set to <SPACE>).

Each configuration panel includes a set of controls: an "ENABLED" checkbox (checked), "Fit to Line?" and "Is Table?" checkboxes (unchecked), and an "Advanced settings" link. To the right of each panel is a "SHOWING: Styles" section with "paragraph style" and "character style" dropdowns, and an "Apply style to condition" checkbox (checked). A "Carlsle Printing" watermark is visible at the bottom right of the interface.

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Amish

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