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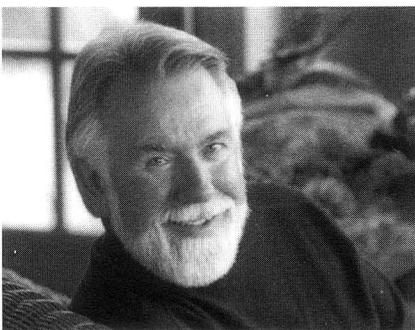
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Word for Genealogy: Utilizing Microsoft® Word in Genealogical Documents in Register, or Modified Register [NGSQ], Format, Part 1

by Alvy Ray Smith

Genealogists are generally unaware of the power built into Microsoft® WORD that is directly applicable to their field. This series of articles will demonstrate a set of WORD techniques that greatly ease the burden of writing papers or books in Register, or Modified Register [NGSQ], format. The techniques can be easily added to already existing documents.

RENUMBERING A DOCUMENT IS A FORM OF torture unnecessarily endured by authors of genealogies. An insertion or deletion of a family member necessitates a renumbering, regardless of the format used. This is particularly noisome when *Register* format is used, Modified [NGSQ]^[1] or not, because the numbering is cumulative; a change in the early parts of the document ramify throughout the entire document. Here I will show how simple techniques built into WORD obviate the need for renumbering forever.^[2] And these techniques apply to all



Alvy Ray Smith. Courtesy Kathleen King Photography, Seattle, Washington.

numbered items in a document, not just persons — for example, illustrations and appendixes.

Genealogy documents can become cumbersome, especially the larger ones. The well-known hyperlinks commonly used on the Internet also can be

used *inside* a WORD document. These links can be made invisible to readers of the document, and they greatly ease the author's task of creating the document in the first place. For example, it becomes trivial with hyperlinks to jump from the sketch of a child to the sketch of its parent and back. You, as an author, no longer have to remember where these bits of text reside in the document, nor is a search for keywords required; a simple click just takes you there.

Another class of problems, particularly in larger documents, are called table-generation problems — for example, of tables of contents, illustrations, names, and

places — where page numbers are attached to specific items. WORD techniques are available to generate these automatically, the correct page numbers being inserted automatically by WORD.

Automatic numbering and renumbering

There are two fundamental WORD skills required for enabling your document to automatically renumber. You must understand bookmarking, and you must know how to insert a sequenced number. After the general techniques are introduced, they will be applied to a document in *Register* format, and also to one in *Modified Register* [NGSQ] format.

Bookmarks. A bookmark is a named location in your document. You can place a bookmark anywhere you want. For example, in a sketch for *Preserved Partridge*, my fictitious genealogical patriarch, I might want to bookmark his name so that I can easily jump to his sketch from elsewhere in the document. (I will show you how in part 2.) I would click next to his name to indicate where I want to place a bookmark. I might click directly left of his name, for example, or I might select his entire name, meaning that I want the bookmark to be associated with this occurrence of his name.

To insert a bookmark, click on *Insert: Bookmark*^[3] and add a name of your invention for the bookmark in the box provided. Then click *Add*. I might choose for a bookmark name, in this example, *PreservedPartridge*. The only real requirement is that the name be unique among your bookmarks. **IMPORTANT** — *A bookmark cannot have embedded spaces*. So *Preserved Partridge* is not allowed, but *Preserved_Partridge* is.

Sequenced numbers. To insert a sequenced number means to insert the next number, whatever it is, into a desired location, without you yourself having to know what that number actually is. Different sequences have different names, so that WORD can distinguish between them. For example, a sequence of persons might be called *Person*, a sequence of children *Child*, a sequence of illustrations *Figure*, and a sequence of appendixes *Appendix*. Generally, this is accomplished by clicking on *Insert: Field: Seq*, then editing the command to contain the desired sequence name. Let's step through this:

In your document click on a position where you want to insert an automatic number. Then click on Insert: Field. You must then choose the Field name called Seq in the list displayed. An easier way to do this is to first choose from Categories (use the down arrow to see the list) the sequence type called Numbering, then Seq is easier to find in the shortened list under Field names. You may skip this last step, but you will have to scroll down through a long list of names to find Seq.

Now you will want to edit the field command that you are preparing to enter into your document. You will not see the command (in the document) but only its effects. To edit, click on the button Field Codes, which opens up an editing box with the word SEQ already typed in and labeled Field codes.^[4] You will type the name of your sequence next to that word. (WORD automatically inserts a space for you after SEQ.) For example, here is where you might type the word *Person* for your automatic person sequence. Of course, you can see the command in this editing box.

In general you will now want to add some formatting instructions to your field command, but in the simplest case, this is not necessary. Be sure that the box next to Preserve formatting during updates is checked.^[5] When you are done, simply click OK. The next number in the (named) sequence will automatically appear where you inserted this command. It would be an Arabic number in this case because that is the default without explicit formatting instructions. It will start at 1 if you have not told it otherwise with a special formatting instruction. In the examples below, formatting will be further explained.

Example 1. Suppose our first sketch in *Register* format is devoted to Preserved Partridge. Our goal is never to use an explicit person number, only automatically generated person numbers (or fields that will be shaded in gray^[6]). We might wish a brief sketch to look like this:

1. PRESERVED¹ PARTRIDGE was born 1642, died 1701, and married in 1664 CHARITY HOPKINS, who was born 1643, and died 1699.

When I entered this sketch, I did not type the leading 1. I started the paragraph with the period that would follow the number and then typed the rest of the paragraph. Then I clicked just left of the leading period where I wanted an automatic number to be inserted. Here I invoked the skill for insertion of automatic numbers described above and entered the command

SEQ *Person*

via the sequence described above: Click on Insert: Field: Seq: Field Codes. Then I typed the word *Person* next to the word SEQ, and clicked OK. The Arabic numeral 1 appears automatically.

I could have *forced* the 1 by the command

SEQ *Person* \r 1

which resets the named sequence to the number following the \r.^[7]

Example 2. Now let's add children to Preserved's sketch. We will use the sequenced number skill several times, in several variations, to accomplish this. Suppose we want the full sketch to look like this, in *Register* format (Modified *Register* [NGSQ] will be explained in the following example):

1. PRESERVED¹ PARTRIDGE was born 1642, died 1701, and married in 1664 CHARITY HOPKINS, who was born 1643, and died 1699.

Children:

- i. ZEBULON² PARTRIDGE, born 1664.
- 2 ii. EXPERIENCE PARTRIDGE, born 1668.
- iii. BETHUEL PARTRIDGE, born 1670.

Since daughter Experience is to be expanded into her own sketch, she is given the next successive person number. You should be able to do this by now. Simply insert, where you want her number to appear, the command

SEQ *Person*

(assuming that I no longer need to explain all the clicking and typing that this really means).

Now we apply the sequenced number skill in new ways. In the numbered list of children there are two things to notice: (1) The list always restarts from i in every sketch; and (2) the numbers are lowercase Roman numerals.

The command to use for the first child in such a list is

SEQ *Child* \r 1 * roman

where I have arbitrarily chosen the name *Child* for this special type of sequenced number.^[8] I don't want this sequence of numbers to interfere with my main person numbering scheme — the *Person* numbers. You can choose any name you want, of course.

Since the numbering must restart at i in each sketch, I have explicitly supplied the \r 1 formatting instruction to the command. If you have trouble remembering this, you can find the formatting commands in the dialog box for Insert: Field: Seq: Field Codes: Options: Field Specific Switches. Click on \r and —VERY IMPORTANT— click on Add to Field to insert the switch into the command being constructed in the editing box. This step is very easy to overlook, and I cannot overemphasize the care you should take not to skip it. You will get unexpected results if you do, and such unexpected results should immediately alert you to the possibility that you forgot to Add to Field. You will also have to explicitly type the 1 (or other desired start number) after the switch \r. Then click OK. No space has to separate the \r from the 1, but I use one anyway.

To format the number as a lowercase Roman numeral, either explicitly type the formatting command * roman as shown or perform this sequence: Click on Insert: Field: Seq: Field Codes: Options: General Switches: Formatting: i, ii, iii, Don't forget to click Add to Field before you click OK! No space has to separate * from roman, but I use one anyway.

Now back to Preserved's sketch: The other two children are easy. Just insert in the appropriate places the command

SEQ Child * roman

where the only difficulty might be forgetting to format for lowercase Roman numerals, or forgetting to click the Add to Field button.

Example 3. Same as the example above but for Modified Register [NGSQ] format in which every person gets a number, whether expanded into a separate sketch or not, a plus sign (+) indicating expansion into a separate sketch:

1. PRESERVED¹ PARTRIDGE was born 1642, died 1701, and married in 1664 CHARITY HOPKINS, who was born 1643, and died 1699.

Children:

- 2 i. ZEBULON² PARTRIDGE, born 1664.
- + 3 ii. EXPERIENCE PARTRIDGE, born 1668.
- 4 iii. BETHUEL PARTRIDGE, born 1670.

The only difference between this and the previous example is that two additional *Person* numbers need to be inserted, for Zebulon and Bethuel, using the by now well-known command

SEQ Person

The *Child* numbering is exactly the same as before.

Example 4. Adding a sketch for Experience Partridge requires use of the bookmarking skill and brings the full power of automatic renumbering into play. Suppose Experience's sketch will look like this, in Register format:

2. EXPERIENCE² PARTRIDGE (*Preserved*¹) was born 1668, died 1735, and married SAMUEL THOMAS, who was born 1666, and died 1727.

It is important that the number of this sketch match the number in the list of children in Preserved's sketch, even if that number changes (and we will change it in an example below). The rule that will be followed is this: After the first sketch, we introduce new numbers only in children lists, never in person, or sketch, lists. So how do we get the number 2 above to automatically insert itself in Experience's sketch?

The main technique involves the use of a bookmark, followed by use of a field command referencing that bookmark. The first step is to bookmark every child who is to be expanded into a separate sketch. In this case, we have one such child, child ii in the sketch for Preserved Partridge. In that line select the *Person* number field (the 2, not the ii) and insert a bookmark for it by clicking on Insert: Bookmark and inserting a name for the bookmark. IMPORTANT — Be sure to put a space between the word *Person* and your bookmark name. For this example I invented the bookmark name *EXPERIENCEofPRESERVED*. I tend to be wordy so that I will have no difficulty picking out a particular bookmark later when I might have hundreds of them in my document. If you know there

will be only one Experience in your document, you might simply call the bookmark *Experience* or *EXPERIENCE*. What you have done is to associate this bookmark with the automatically generated number assigned to Experience in the list of children under Preserved.

IMPORTANT — The instruction above is to select the *Person* number field before inserting a bookmark for it. This means exactly what it says: Select the entire number field. WORD will do the right thing if you click just left of the number field, but it will fail (in a way that is very difficult to debug) if you simply click some arbitrary place on the line to insert the bookmark. I recommend you select the entire field. One way to do this is to push down the left mouse button with the cursor just to the left of the number and then drag the cursor to the right until the entire field is highlighted, then release the mouse button and insert the bookmark to be associated with this selection.

Now we will use the new bookmark to number Experience's own sketch. Click on the position where this number is to appear to the left of the first line of Experience's sketch. Then insert the command

SEQ Person EXPERIENCEofPRESERVED

in the usual way, but with one addition. That is, click on Insert: Field: Seq: Field Codes, and then type the word *Person* after the word SEQ which is already provided. Then either type the bookmark name from memory, or click on the Options button, then click on Bookmarks, then find the desired bookmark in the list supplied, and click on it. Then —VERY IMPORTANT — click Add to Field before clicking OK. This will cause the number associated with the specified bookmark to be inserted in the desired position. That's the magic of automatic renumbering. If, for some reason, the number assigned to child Experience changes, then the number of her sketch will automatically renumber too.

Example 5. Same as the example above but for Modified Register [NGSQ] format:

3. EXPERIENCE² PARTRIDGE (*Preserved*¹) was born 1668, died 1735, and married SAMUEL THOMAS, who was born 1666, and died 1727.

Exactly the same technique is used here as in the example immediately above. Since the automatic number generated in the Modified [NGSQ] case is a 3 instead of a 2, the number 3 automatically appears as the number for Experience's sketch.

You now know the basics of automatic numbering. Let's exercise the scheme with an example requiring a renumbering. You will see that no renumbering work is involved at all!

Example 6. Here we insert a new second child, resulting from some recently acquired research on the family of Preserved Partridge:

1. PRESERVED¹ PARTRIDGE was born 1642, died 1701, and married in 1664 CHARITY HOPKINS, who was born 1643, and died 1699.

Children:

- i. ZEBULON² PARTRIDGE, born 1664.
- 2 ii. PATIENCE PARTRIDGE, born 1666.
- 3 iii. EXPERIENCE PARTRIDGE, born 1668.
- iv. BETHUEL PARTRIDGE, born 1670.

I actually did no insertion of commands to effect this change. I simply copied the line containing Experience and then pasted it, in the same place. Then I changed the name Experience to Patience in the new second line, and changed the date to 1666. This works because the correct fields for the numbers have already been inserted and they were faithfully copied when I did the copy and paste. **IMPORTANT:** *To see the automatic renumbering, you must cause the fields to be updated.* To do this, select the lines that will be affected, and then click on F9. The safest thing to do is to select the entire document (Edit: Select All will do this, or click in the main text and type Control + A), then click F9. This regenerates all the number fields in the document.

Do not copy the first line, Zebulon's line, because it contains the embedded command

SEQ Child \r 1 * roman

which resets the Child number to i. You *can* copy and paste any of the other children's lines, but choose one that has the same fields as you wish to appear in the new line.

Of course, you can always resort to entering by hand the SEQ commands as described earlier, but once crucial parts of a document are established, such as the first sketch, then much can be accomplished with just copy and paste.

When the sketch for Experience Partridge is updated (by selecting it and clicking F9), its number automatically becomes a 3. No work on the author's part is required. The author's work is to add a sketch for Patience Partridge, using the numbering techniques already described.

Example 7. Same as the example above but for Modified Register [NGSQ] format:

1. PRESERVED¹ PARTRIDGE was born 1642, died 1701, and married in 1664 CHARITY HOPKINS, who was born 1643, and died 1699.

Children:

- 2 i. ZEBULON² PARTRIDGE, born 1664.
- +3 ii. PATIENCE PARTRIDGE, born 1666.
- +4 iii. EXPERIENCE PARTRIDGE, born 1668.
- 5 iv. BETHUEL PARTRIDGE, born 1670.

Exactly the same technique works for Modified Register [NGSQ] format. The only difference in this case is that, after updating the document (with select and F9), the sketch for Experience will automatically be renumbered 4. ♦

In the next issue:

**Updating existing documents and troubleshooting
automatic numbering and renumbering,
and internal hyperlinks**

Notes

¹ There is controversy about the naming of this format, which is also called Jacobus, *Record* format (for *The New York Genealogical and Biographical Record*), or NGSQ format (for the *National Genealogical Society Quarterly*). Since the NGSQ terminology is highly favored today by a substantial number of important genealogists, I have elected to show that name also every time I use the Modified *Register* name, so that there is no confusion about my intent.

² Henceforth WORD will signify Microsoft® WORD in all its many versions, a product of the Microsoft Corporation. The version I use for all examples is Microsoft® WORD 2002, running under the Microsoft® WINDOWS XP operating system. Some modification of procedures described herein may be required for other versions.

³ This abbreviates the wordy sequence: Click on Insert (in the menu bar near the top of the window); then click on Bookmark. Using this technique, the entire sequence in this paragraph could be abbreviated to: Click on Insert: Bookmark: *PreservedPartridge*: Add. Regular sanserif typeface indicates WORD commands or dialog box labels, and *Italic sanserif* typeface denotes invented strings of text or numbers that you provide.

⁴ In some versions of WORD, you will not have to click on a button to get this editing box to appear. It will just be there, labeled Field codes.

⁵ This inserts an option called * MERGEFORMAT, so don't be surprised if you stumble onto that one. It simply means to use the formatting in the vicinity of the inserted number. For example, the text in the vicinity of the inserted number is boldface, then the inserted number will be boldface. This is usually what you want to happen.

⁶ To make this parenthetical phrase true, click on Tools: Options and set Field shading to Always. Then click OK. Alternatively, you can set Field shading to When selected, in which case, a field will be shaded in gray only when you select it. I recommend Always, but if you also have Bookmarks checked, then you might opt to go with When selected. Otherwise the field shading can mask the Bookmarks indicators (gray [and] brackets).

⁷ WORD does not distinguish case in these commands, and spaces are not required before or after switches, so these commands could be equivalently written *seq person*, and *seq person\r1*, respectively.

⁸ As previously indicated, this command could be written equivalently *seq child\r1*roman*.

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