



Manitoba
Genealogical
Society



MANI Volunteer Manual

A procedural guide for MGS Volunteers

[Title]

Draft- Revised
Date: 2016 01 01
Client: Gord McBean (Manitoba Genealogical Society)
Product: Manitoba Name Index
Author: Irene Lee

Contents

Welcome to MANI: About MANI.....	1
Please sign in.....	2
Menu bar/tasks.....	4
Main Menu.....	4
Search.....	4
Store.....	4
Volunteer.....	4
Upload.....	4
Edit Tables.....	5
Error Report.....	6
My Account.....	6
Editing tables.....	6
Selecting a table.....	6
MANI tables.....	7
Filtering table results.....	9
Updating records.....	11
Uploading records.....	11
Uploading bulk records.....	12
Uploading one record.....	12
Uploading a record to a table.....	12
Example 1 - Adding a Book.....	12
Creating records.....	14
Rules for data entry.....	14
Process for updating cemetery transcriptions.....	15
My account.....	16
MANI error reporting system.....	16
Appendices.....	17
Appendix A: Newspaper codes (as of March 2015. Check MANI table for latest additions.).....	17
Appendix B: Record type codes.....	19
Appendix C: Creating CSV files for bulk upload.....	20

Table of Contents

Indexing of sources	20
Uploading more than one record	20
What is a template?.....	20
Making a file with Microsoft Excel.....	20
Reviewing CSV files before uploading by Admin/Coordinator	23
Rules for data entry	24
Appendix D: Preparing PDF files	26
Digital documents.....	26
Appendix E: Table specifications	27
Glossary	36
Index.....	38



Welcome to MANI: About MANI

The goal of the MGS Data Project was to make the MGS data more broadly accessible to our members in a form that is easier to search. MGS Members have web access to the indexes similar to what other provincial genealogical societies have thanks to MANI.

Because our indexes are so much an integral part of our research, they may be taken for granted. They seem so extensive and so easily produced and reproduced. In the past however these important resources could be lost due to fire or due to a digital storage device failure. What was needed was a preservation scheme that maintains this unique set of Manitoba information. MANI is our solution to preserve this information and provide better access to our members. It is online 24/7

Hundreds of hours of volunteer time has gone into creating our original indexes and hundreds more to prepare them for uploading into MANI. We owe a debt of gratitude to the MGS volunteers past and present that have made MANI possible. We would also like to thank the student teams at Red River College who have worked on programming MANI and helped to create these manuals.

The Production Database is the only one that Members see.

The Development Database is the one that Volunteers see and work in. Changes a volunteer makes do not show up on the Membership view on the Production Database. The changes are made in the Development database and are pushed to the production by the administrator.

The MGS Membership System is hosted by MANI. It is separate from the rest of MANI and only accessible by the membership committee. A special access has been created for each Branch to allow that Branch to see their members' information.

MGS Online Store is a feature that allows individuals to purchase items and have them shipped. In addition, downloads of publications in electronic format may be purchased.

PPV or Pay-Per-View is a feature that allows patrons to purchase credits for page views. The credits are used for downloading individual pages from selected publications such as Cemetery Transcriptions.

[Title]

Please sign in

From the MANI home page <http://mani.mbgenealogy.com>, click on the “Login” link on the top right corner of the banner:



Figure 1: Home page

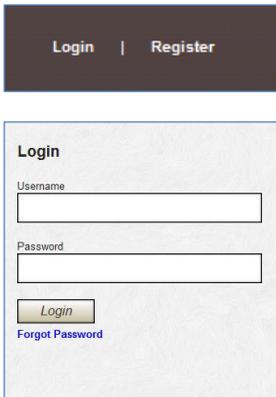


Figure 2: Login screen

Volunteers should have become proficient using MANI as a member first before using these features.

When you are finished it is best practice to use the **logout** button. This prevents others from accessing your account on the same computer. You have enhanced access standard members do not have!

Please sign in

[Title]

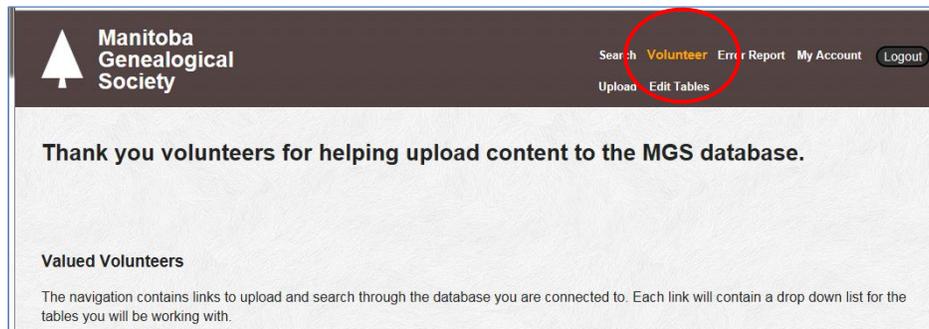


Figure 3: Volunteer screen

Select the Volunteer link at the top right corner of the banner if the administrator has upgraded your account to include the Volunteer role. You will have a sub-menu with links for Upload and Edit Tables.

Menu bar/tasks

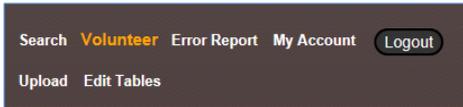


Figure 4: Volunteer menu bar

The links on the banner allow you to access the tools for Volunteers in MANI in addition to those in the Member role. Each is described below.

Main Menu

Search

Conduct a search by entering information into just one of the search fields where that field is at least a First or Last name. This is explained in more detail in the member manual. When you use this search feature you are using *your* membership account and access i.e. pay-per-view (PPV) credits.

Store

See the Members Manual for directions in using the MGS e-store

Volunteer

In Figure 5, the yellow highlighting of the word “Volunteer” indicates that you have selected the volunteer menu. The volunteer menu includes the following sub-menu items:



Figure 5: Volunteer sub-menu

Upload

Upload either single records or bulk records into MANI. Figure 6 shows the resulting screen when the upload sub-menu has been selected. Note the yellow highlighting of the word “Upload”.

Uploading recordsUploading one recordError! Reference source not found.

[Title]

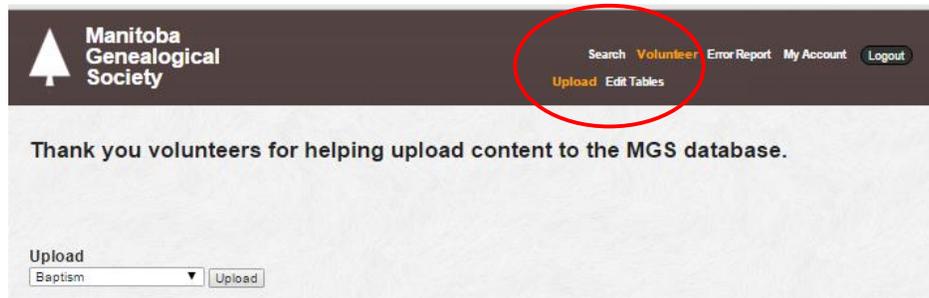


Figure 6: Volunteer upload screen

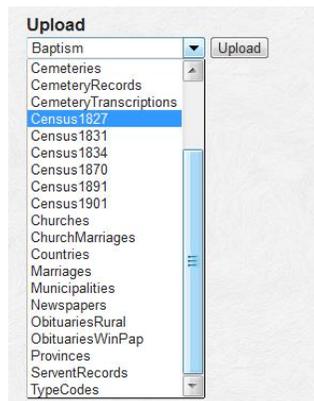


Figure 7: Selection of tables to upload

Edit Tables

View or update the content of individual tables. This will be explained in more detail on page 6. Figure 8 shows the resulting screen when the edit sub-menu has been selected. Note the yellow highlighting of the phrase “Edit Tables”.

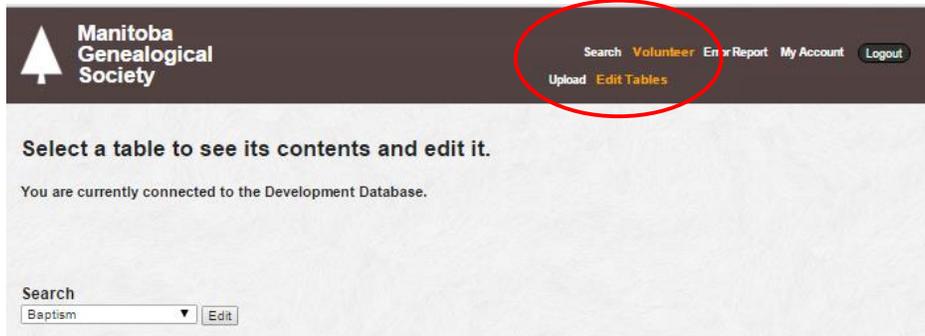


Figure 8: Volunteer edit screen

Error Report

Report problems or request features to be added to MANI. This is explained in more detail in the member manual.

My Account

Provides a sub-menu to view or change your personal MGS membership account details. This also shows your balance of pay-per-view credits. This is explained in more detail in the member manual.

Editing tables

MANI is divided up into a number of tables that store information. The following section describes how to update the information in tables.

Selecting a table

1. Click on the Edit Tables link.
2. Click on the pointing down arrow  shown below. When you click on it, a list of choices will appear (or “drop down”).

Uploading recordsUploading one recordError! Reference source not found.

[Title]

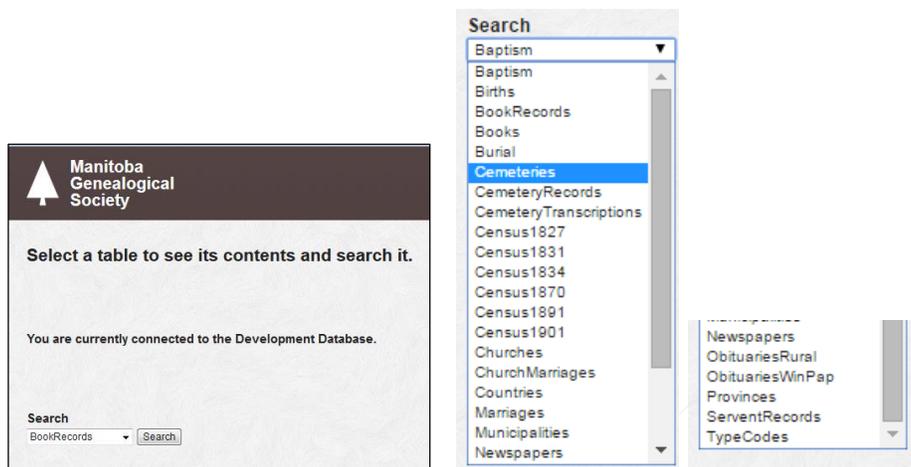


Figure 9: Selection of tables to edit

MANI tables

Each of the above tables when selected provides a complete listing of the records in that table.

The table types are described below.

Baptisms - Future collection. See the table description in the Appendix to view the fields. Each collection has been tailored to provide the proper table to record that specific type of data in their collection.

Births - Future collection. See the table description in the Appendix to view the fields. Each collection has been tailored to provide the proper table to record that specific type of data in their collection.

Book Records – Contains the indexes for books and other publications in MANI. Each book record is linked to a book that has already been entered into the Books table.

Books – This table holds the list of books and other publications that have been indexed and loaded into MANI. It includes information about the book. A future update might add links for the book table

Burials - Future collection. See the table description in the Appendix to view the fields. Each collection has been tailored to provide the proper table to record that specific type of data in their collection.

Cemeteries – Contains all cemeteries indexed by MGS and entered into MANI. Information on the cemeteries and links further information about them.

CemeteryRecords – This table holds the individuals that have been indexed in the MGS cemetery. Each record is linked to the cemetery it is part of.

Cemetery Transcriptions – This is the table for loading and storing Cemetery Transcription used for the PPV page views

Census 1827 – covers Red River settlement. Each census contained different information so they are in different tables.

Census 1831 covers Red River settlement.

Census 1834 covers Red River settlement.

Census 1870 Covers Manitoba

Census 1891 Covers Manitoba

Census 1901 Covers Winnipeg only

Churches - Future collection. See the table description in the Appendix to view the fields. Each collection has been tailored to provide the proper table to record that specific type of data in their collection.

Church Marriages - Future collection. See the table description in the Appendix to view the fields. Each collection has been tailored to provide the proper table to record that specific type of data in their collection.

Countries – Allows MANI to define the country i.e. a stray index for Manitobans.

Marriages – A table to hold information normally contained in marriage records and announcements.

Municipalities - Allows MANI to define the municipality.

Newspapers – A list of newspapers that have been indexed.

ObituariesRural – Contains all rural obituaries indexed by MGS and entered into MANI.

ObituariesWinPap – Contains all Winnipeg obituaries indexed by MGS and entered into MANI. Information from the obituaries including when published and what paper.

Provinces - Allows MANI to define the province.

Uploading recordsUploading one recordError! Reference source not found.

[Title]

TypeCodes – Publication or record types for items found in the MANI tables. They are dynamically displayed in the event legend displayed for the member search results. This is shown in Figure 10. If a new type code is added, the legend will update to include it.

TypeCodes are listed in Appendix B.

Event Legend				
b = Birth	bu = Burial	c = Census	ch = Christening/Baptism	cr = Church Record
ct = Cemetery Transcription	d = Death	fc = Funeral Card	fh = Family History	lh = Local History
m = Marriage	n = Newspaper Article	nc = Note to Creditors	o = Obituary	pi = Publication Index
sr = Servant Record	vs = Vital Statistics			

Figure 10: Event legend

Filtering table results

You can use the same table features found in the Member Search Results tables to filter and navigate through the information.

Note that the filter for the table in Figure 11 has selected 312 entries from a total of 107,703 indexed items in the table.

Table : BookRecords										
Show 10 entries	Search all columns:									
ID	LastName	FirstName	BookCode	PageNumbers	EventYear	Info	TypeCode	StatusCode	Edit	Delete
107196	BRIESE	Margaret	LH0003	Cover Picture - i			LH	CURRENT	Edit	Delete
107197	BRYDON	Margaret	LH0003	Cover Picture - i			LH	CURRENT	Edit	Delete
107198	CRAWFORD	Eida	LH0003	Cover Picture - i			LH	CURRENT	Edit	Delete
107199	JONES	Irma	LH0003	Cover Picture - i			LH	CURRENT	Edit	Delete
107200	SMITH	Hilda	LH0003	Cover Picture - i			LH	CURRENT	Edit	Delete
107201	ABERSON	Jane	LH0003	Pho - III			LH	CURRENT	Edit	Delete
107202	ARMSTRONG	Helen	LH0003	Pho - II			LH	CURRENT	Edit	Delete
107203	BENEDICTSSON	Margaret J.	LH0003	Pho - II			LH	CURRENT	Edit	Delete
107204	BROWN	Gretta	LH0003	Pho - II			LH	CURRENT	Edit	Delete
107205	DICK	Harriet	LH0003	Pho - II			LH	CURRENT	Edit	Delete

Showing 1 to 10 of 312 entries (filtered from 107,703 total entries)

Figure 11: Sample of filtered book record for LH0003.

Unique fields viewable by the volunteer are:

Status Code – Indicates the status of the record item:

[Title]

Uploading records

- **NEW** – has been added to Development Database but not yet moved to the Production Database for members to view.
- **EDITED** – existing record that has been edited and needs to be moved over to the Production Database.
- **CURRENT** – currently visible in the Production Database by members. Changes require the Administrator to approve them and move them to the Production Database.

Edit – Allows the fields of an existing record to be edited or changed. The item will be marked as EDITED in the status code

Delete – Deletes the record from the MANI table.

Uploading recordsUploading one recordError! Reference source not found.

[Title]

Updating records

When the Edit Link for a record is clicked we see the Edit This Entry screen where we can modify the information entered for that record. Each Table will include unique fields. An example is shown in Figure 12.

Edit This Entry	
LastName	<input type="text" value="BRIESE"/>
FirstName	<input type="text" value="Margaret"/>
BookCode	<input type="text" value="LH0003"/>
PageNumbers	<input type="text" value="Cover Picture - i"/>
EventYear	<input type="text"/>
Info	<input type="text"/>
TypeCode	<input type="text" value="LH"/>
StatusCode	<input type="text" value="CURRENT"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Figure 12: "Edit This Entry" screen

Uploading records

This is usually done by the Administrator or their designate. The upload link takes you to a page where you can upload a prepared file or enter a single record. Uploading CSV files is done by upload coordinators or by the administrator as there are stringent requirements for the files to be successfully loaded into MANI.

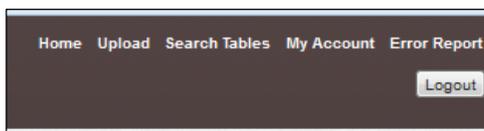


Figure 13: Upload link

Upload: This is the tool where either single records or bulk uploads of records are entered into MANI.

Uploading bulk records

Uploading bulk records is covered in Appendix C and requires additional training.

Uploading one record

Individual volunteers may be trained by the coordinators or the administrator and will be authorized to add single missing records.

Uploading a record to a table

When you upload a single item to MANI you are adding a record to a table. Each record contains information relating to one person. A record is displayed as a row. Records are made up of fields (e.g. last name, first name). Each table in MANI has a unique set of columns, each entry or cell is called a field.

Example 1 - Adding a Book

A book is one type of record stored in MANI and store in a unique table called “Books”. It contains information relating to one single book. This example assumes that the book/publication is in KOHA.

Checking if the book already exists

1. Click on Edit Tables link.
2. Select the Books or BookRecords table listing.
3. Check whether the book index exists in the MANI Books list.
4. If the book index does not already exist, you must add the book to the list **before** you can upload the index CSV file for that book. The administrator will normally add Books. Assign the next number to the book as described in the process below. The process is to look for the last number used by the book type i.e LH0021.

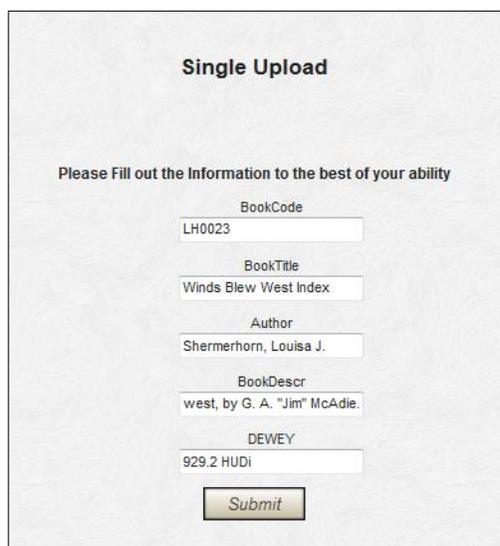
Uploading the book

1. Click on Upload link.
2. Select Books from the drop down list.
3. Click on the Upload button.
4. You are given the choice between Bulk Upload or Single Upload. Unless you are uploading a number of books, it is best to enter them one at a time because the preparation of the CSV file takes some time.
5. In the single Upload part of the screen enter (see Figure 14 for example):
 - A unique book code by combining the Record Code from Appendix B: Record type codes and the next available number after checking table. The format is LLNNNN (2 letters then 4 numbers).

Uploading recordsUploading one record**Error! Reference source not found.**

[Title]

- Book Title from KOHA
- Author from KOHA
- Description from KOHA
- Dewey from KOHA



The screenshot shows a web form titled "Single Upload". Below the title is the instruction "Please Fill out the Information to the best of your ability". The form contains five text input fields, each with a label above it: "BookCode" (containing "LH0023"), "BookTitle" (containing "Winds Blew West Index"), "Author" (containing "Shermerhorn, Louisa J."), "BookDescr" (containing "west, by G. A. 'Jim' McAdie."), and "DEWEY" (containing "929.2 HUDi"). At the bottom of the form is a "Submit" button.

Figure 14: "Single Upload" screen

Once you click the Submit button you should get a screen that says "You have entered a row successfully into Books" to confirm the action.

Enter single entries into other tables following a process similar to above.

[Title]

Creating records

Whether entering a single record or creating a csv file for bulk uploading, the following rules apply.

Rules for data entry

- Last Name should be in all CAPITALS.
- Make a duplicate entry for maiden names or alternate names. Each of the different last names (married and maiden) should be entered in the last name field with the alternate name being in brackets after the first name. See Figure 15.

415	McBRIDE	James Irvine	1878	1966	2	1	0001	ct	CURRENT	Alexander
416	McBRIDE	Janet Aiken (nee FERGUSON)	1843	1902	2	1	0001	ct	CURRENT	Alexander
417	McCLELLAND	Bessie (Mrs CRITCHLEY)	1865	1948	24	1	0001	ct	CURRENT	Alexander

Figure 15: Example of entries maiden names

- Do **not** put a space in names beginning with “MC” or “MAC” (e.g. McBean and MacDonald). The Mc and Mac should be mixed case with the remainder being ALL CAPITALS for the last name. See Figure 15 and Figure 16.

1600	HARASYMCHUK	Fedor (Fred)	STC	1981	Mar 11	o
1606	HARRIS	G.G. (Rev.)	MT	1981	Apr 2	o
1622	HAWKER	Alfred Edgar (Ed)	PPDG	1981	Dec 04/07/16	o

Figure 16: Example of entries with alternate names

- Use four digit years 1999.
- The following characters cannot be used:
 - Quotes “ ”
 - Periods .
 - Commas ,
 - Asterisks *
 - Percent %
 - Pipe, which is a vertical line
 - “Dittos”, which means “Same as above”

Process for updating cemetery transcriptions

A planned approach is required when updating Cemeteries as it effects so many other areas in MGS, not just the printed cemetery transcriptions.

1. Mark the cemetery transcription with a note indicating that the transcription is in the process of being updated. The cemetery transcriptions are stored in the buff file cabinet by the office located in the centre of the MGS Library.
2. If doing minor additions, add new entries as an Addendum sheet(s) at the end of the listing to preserve the original page numbers because the electronic indexes point to those page numbers.
3. Any total revamp of a Transcript has to be discussed with **all of the players it affects:**
 - a. Chair of Special Projects
 - b. VP IT
 - c. Librarian

A total revamp will require:

- New transcription and index. Each record in MANI for that Cemetery must be edited for the new page numbers.
- Revised PDF copy of the Cemetery transcription to replace the previous PDF file in MANI. The PDF files are delivered as part of the pay-per-view or online cemetery transcription sale from MANI and the MGS bookstore.
- Revised Word transcription file, Excel index file and PDF (complete) file to replace the previous copies. These are placed in the MGS Network storage drive.

There is a file naming convention for each of these files that must be used.

Commented [GLM1]: Insert file naming convention and folder heierarchy standards.

Add File naming convention

Commented [GLM2]:

List network location of files.

Commented [GLM3]:

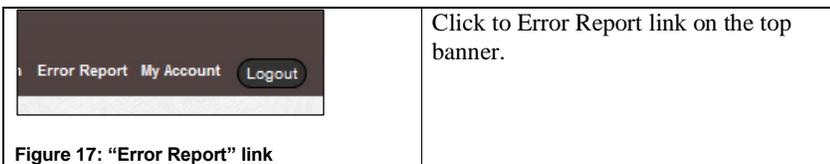
[Title]

My account

You can change information in your account, such as your password. You can also view a list of everything you've purchased, renew your membership, and join new branches. See the Members manual for more details.

MANI error reporting system

A feature has been built into MANI so that you can record and report problems or request features be added to MANI.



Click to Error Report link on the top banner.

Figure 17: "Error Report" link



The form is titled 'Error Report' and contains the following fields and text:

- Text: "Please submit the form with as much information as you can. We'll try and fix the problem as fast as we can. Only the name and description is required."
- Text: "Name:" followed by a text input field containing "John Doe".
- Text: "Email:" followed by a text input field containing "Example@example.com".
- Text: "We'll be using your email to contact you if we have further questions about the error. Feel free to leave it blank if you don't wish to be contacted."
- Text: "Title:" followed by a text input field containing "Example: Search error".
- Text: "Description of how the error occurred:" followed by a large text area containing "Example: When I'm searching for my last name there's some random code/words and numbers showing up at the top of the page."
- Text: "Submit Query" button.

1. Enter your name [mandatory field].
2. Enter your email address. This will be used if further clarification is needed or information needs to be sent to you.

Describe the steps that you took leading up to the error you received so that someone else can follow the exact process you used and get the same results. E.g. "As a member, I logged on and entered McBean into the last name field and clicked on the Search. I had the include entries with no year values checked. In the search results, I clicked on the link for William John McBEAN who died in 1982 which is an obituary entry. Nothing happened!"

Figure 18: "Error Report" screen

Appendices

Appendix A: Newspaper codes (as of March 2015. Check MANI table for latest additions.)

CODES 1980 - 2005	
CODE	PAPER
BBG	Baldur-Belmont Gazette
BDS	Brandon Daily Sun
BEW	Birtle Eye Witness
BGN	Balder - Gazette-News
BMB	Beausejour Manitoba Beaver
BO	Birtle Observer
BPP	Brandon Penny Pincher
BR	Boissevain - Recorder
BRR	Brokenhead River Review (Beausejour)
BSUN	Brandon Sun
BT	Brandon Today
BWB	Brandon Blade
BWM	Brandon Weekly Mail
BWS	Brandon Weekly Sun
CF	Canadian Farmer (Kanadysky Farmer)
CHN	Kanadai Magyar Ujsag (Canadian Hungarian News)
CNE	Carberry News-Express
CP	Carberry Plains
CRO	Crossroad (Birtle, Rossburn, Shoal Lake, Hamiota)
CVL	Carmen Valley Leader
CWW	Crow Wing Warrior (Morris)
DE	Der Nordwesten
DH	Dauphin Herald
DH/GE	Dauphin Herald/Grandview Exponent
DH/IS	Dauphin Herald/Interlake Spectator
DTS	Deloraine Times & Star
EDI	Emerson Daily International
EDM	Emerson Daily Manotabau
EE	Ethelbert Echo
EI D	Emerson International Daily
EI	Emerson International
FA	Farmers Advocate, The (Neepawa,

	Rivers)
FFR	Flin Flon - The Reminder
FP	Free Press (Manitoba, later Winnipeg)
FPW	Free Press Weekly
G	Germania
GE	Grandview -The Exponent
GG	Glenboro Gazette
GLE/BAL	Glenboro/Baldur Gazette
CODE	PAPER
GP	Gilbert Plains Maple Leaf/Gladstone Age Press
GW	Gladstone Age & Westbourne Co. Advertiser
HE	Hamiota Echo
HH	Headingly Headliner
HLP	Gladstone Herald Press Leader
IS	Interlake Spectator
JPN	Jewish Post & News
KG	Killarney - The Guide
LAK	LAKESIDE LANCE
LAL	La Liberte
LBL	Lac Du Bonnet Springfield Leader
LH	Logberg-Heimskringla
LL	La Liberte
LMAN	Le Manitoba
LMET	Le Metis
LN	Snow Lake News
LV	The Villager
MAN	MANITOBAN
MG	Manitoba Gazette
MH	Manitoba Herald
ML	Manitoba Liberal
MM	Manitoba Mountaineer
MMN	Manitoba News Morden
MNE	Melita - New Era
MOT	Morden Times
MOT/WC	Morden Times/Western Canadian Manitou
MT	Minnedosa - Tribune
NAT	Natotawin - The Pas First Nations
NB	Neepawa Banner
NBN	Nickle Belt News (Thompson)
NC	Neepawa Canadian
NH	Manitoba Herald
NN	New Nation

[Title]

Appendix A: Newspaper codes

NP	Neepawa Press
NR	Neepawa Register
NS	Northern Star, The
NT	Tribune(Neepawa)
NTA	Northland Times (Arborg)
NW	Nor'Wester
OLTC	Oak Lake Town & Country News
ON	Opasqua News (The Pas)
OT	Opasqua Times (The Pas)
PC	Pinawa Channel
CODE	PAPER
PFV	Pine Fall Voice
PMS	Pilot Mound Standard
PPDG	Portage La Prairie Daily Graphic
PPL	Leader (Portage la Prairie)
PPWL	Portage la Prairie Weekly, Manitoba Liberal
PPWT	Portage La Prairie Weekly Tribune
PS	Plumas Standard
PST	Prairie Star
PT	Pembina Times
RB	Rivers Banner
RCS	Rapid City Standard
RER	Reston Recorder
RG	Rivers Gazette
ROC	Rockwood Chronicle
ROR	Roblin Review
RRVE	Red River Valley Echo (Altona)
RSR	Rosburn Review
RUB	Russell Banner
SATT	Stonewall Argus & Teuton Times
SC	Sentinal Courier (Pilot Mound)
SE	Selkirk Enterprise
SEJ	South East Journal (Emerson, Altona, Morris,Winkler)
SFN	Snowflake News
SH	Selkirk Herald
SI	Selkirk Interocean
SJ	Selkirk Journal
SL	Snow Lake
SLC	Shoal Lake Crossroads
SLN	Snow Lake News
SLS	Shoal Lake Star

SMR	Southern Manitoba Review (Cartwright)
SMT	Southern Manitoba Times (West Lynne)
SNR	Stonewall News & Rockwood County Advertiser
SPD	Souris Plain Dealer
SRP	Scratching River Post -Morris
SRR	Swan River, The Report
ST	Seniors Today
STC	Steinbach - Carillon
SVE	Souris Valley Echo
SWW	South Western Weekly (Melita)
S&T	Swan River Star & Times
CODE	PAPER
TC	Thompson Citizen
TGE	Gladstone Enterprize, The
TRB	Beausejour - The Review
TS	TIMES SPURT
TT	Treherne Times
VEA	Virden Empire-Advance
WC	Western Canada (Manitou)
WDS	Winnipeg Daily Sun
WDT	Winnipeg Daily Times
WRE	Winnipeg River Echo
WRR	Winnipeg River Review
WS	Winnipeg Siftings
WT	Winkler Times

Appendix B: Record type codes

The record type field tells you what sort of information can be found in that source. It is given as a code:

b = birth	Index of birth records either registers or newspaper announcements
Bu = Burial	
c = census	Index of Census records
ch = christening / baptism	
cr = church record	Index of church records
ct = cemetery transcription	
	Normally these will be included in the MGS Cemetery transcriptions not here. This category is reserved for Cemetery transcriptions that can't be entered into the MANI Cemetery transcriptions collection
d = death	Index of Death records either registers or newspaper announcements
fc = funeral card	
fh = family history	Index of Family History books and other publications produced on a particular lineage
lh = local history	Index of Local History books and other publications produced about a geographic area
m = marriage	Index of Marriage records either registers or newspaper announcements
n = newspaper article	
	Index of Names mentioned in Newspapers
Nc = Note to Creditors	
o = obituary	
	Index of a publication containing Obituaries
pi = publication index	
	Indexes of books that do not fit in any of the above categories
Sr = Servant Records	
Vs = Vital Stats	

Appendix C:

Creating CSV files for bulk upload

This is the method for uploading bulk files into MANI. Special training is required to ensure MANI standards are met. Authorization and training by the Administrator is required before individuals attempt this.

Indexing of sources

MGS and its branches have transcribed cemeteries and created record indexes for source documents such as newspapers and books. These larger index collections are uploaded using Excel files.

Uploading more than one record

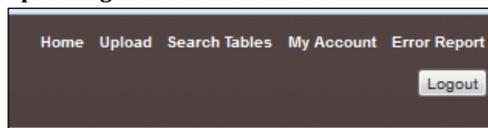


Figure 19: Upload link

Upload: This is the tool where either single records or bulk uploads of records are entered into MANI.

What is a template?

This is a spreadsheet used for preparing indexes to upload into the MANI online database. They will be supplied to you by the MANI Coordinator.

- Templates show the order that the information has to be entered based on which table you are planning to enter data into.
- Each table will have one template made specifically for it. The name of the template file indicates which table it is for.
- Sample directions will come with the MGS Excel file for indexing.
- See Appendix B: Record type codes for MANI record types.

Making a file with Microsoft Excel

- Every row in the Excel file is one entry into the database.
- The top left cell needs to contain "".
- After the first row, the first cell in each row stays **EMPTY**.
- The value in the Status Code column should always be NEW.
- In all Excel files:
 - Format all of the cells that you are entering data into to be text cells.
 - Search and remove/replace any of the following special characters:

Symbols you need to search for and replace

	Symbol	Remove	Replace with
Quotes	“	Yes	Replace with brackets ()
Commas	,	Yes	A back slash \ in dates
Asterisk	*	Yes	
Periods	.	Yes	

- Remove decimal in numbers by rounding numbers. For example, round 23.45 to 23. Round ages to the lower number. For example, the age of 30.75 should be rounded to 30.
- * ● Before the Administrator uploads the Excel file, they will delete the original first row, i.e. column headers and then save it as a CSV file. The first entry should appear in the first row of the Excel spreadsheet.
- If data is missing, leave a blank cell where that data should be or the data will be entered into the incorrect columns of the table after that point
- Do not save as a CSV file. The Administrator will do this. If you load a CSV file that is half done, Excel auto formats data incorrectly and completely changes it.
- If the file has more than one line in Excel and you open the file in notepad, it will appear as a single line. This does not mean your data is wrong. The program does not read the data correctly. To read the data correctly, use a different program such as TextPad, TextPad++, or Sublime Text 2 (All programs listed are free downloads).
- There is a max number of lines of 48,500 per upload file.

Do not open a CSV file in Excel. It reformats the data and causes it to be wrong.

Creating CSV files for bulk upload

Example Excel file

The Status Code column will be at the end to the farthest right. It should always contain the word “NEW” for a bulk upload file. (see example files included in folder). Figure 21 shows what the file looks like when you open it in Excel.

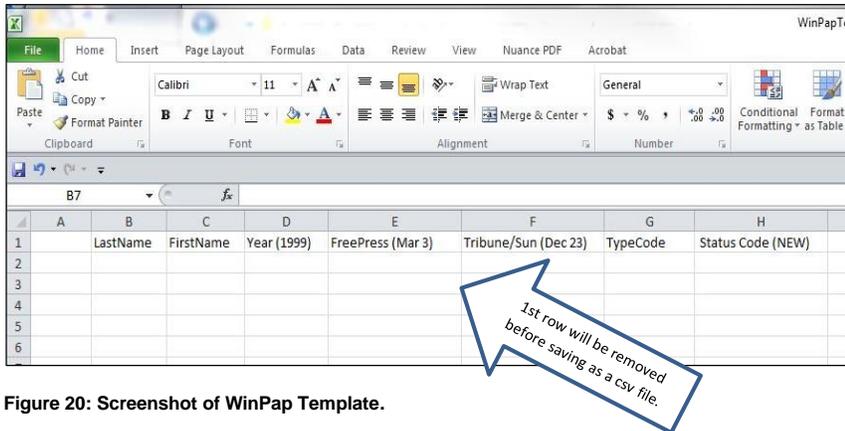


Figure 20: Screenshot of WinPap Template.

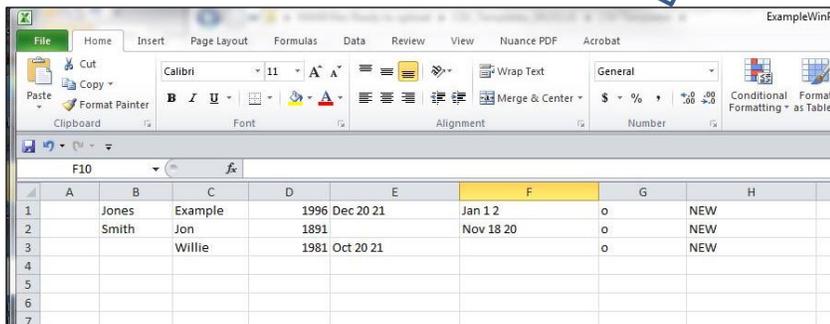


Figure 21: Screenshot of example Excel file, header removed by Administrator

Figure 21 is a screenshot of an example file that is ready to be converted to a CSV file that would be used for the WinPap bulk upload function.

- Column A will be empty for every row that you enter except for the first row.
- The following must be entered into cell A1:="". This must be entered into cell A1 for every file.

Row 1 is an example for what an entry would look like if every column has content.

Row 2 is an example of what you would enter if you did not have a Free Press publication date.

Row 3 is an example of what having no Last Name and no Tribune/Sun publication date.

Creating entries in the tables

- DEWEY has a maximum of 15 characters as assigned in the MGS KOHA Online Catalogue System.
- Book description has a maximum of 256 characters including spaces.
- In the BOOKS Table the Event year =.
- Event legends have a maximum of 3 characters.
- Add all titles and nicknames in brackets after the first name (Dr) (Mrs) (Billy)
- Years are recorded with 4 digits.
- Maximum 40,000 entries per spreadsheet.
- Date Field: The date field contains only the year (e.g. "1872"). In many cases there is no date given.
- Location: The location field gives the location of the event itself. It is simply the historic municipality or city in Manitoba. For non-Manitoba locations, we enter what is provided. We use the name given, e.g. Red River, not Winnipeg. In many cases there is no location to use.
- TypeCode ct = Cemetery Transcription See Appendix B MANI Event Types.

Commented [GLM4]: Define entry

Reviewing CSV files before uploading by Admin/Coordinator

1. Do not load a CSV file into Excel. Use the original XLS file. The Admin or Coordinator will save the worksheet to a CSV file at the end of this process. Only view finished CSV files in NotePad, TextPad, or Sublime Text2. All are free downloads.
2. Remove header.
3. Add the symbols ="" to cell A1.
4. After 1st row, the first column is empty.
5. Ensure all the cells are formatted as text cells.

Creating CSV files for bulk upload

6. Search and remove/replace any of the following special characters:

Symbols you need to search for and replace

	Symbol	Remove	Replace with
Quotes	“	YES	Replace with brackets ()
Commas	,	Yes	A back slash \ in dates
Asterisk	*	Yes	
Periods		Yes	

7. Review the contents to ensure that the above rules above have been adhered to.
8. Enter NEW into the status column.

Rules for data entry

- Last Name should be in all CAPITALS.
- For maiden names: Make a duplicate entry for maiden names or alternate names. Each of the different last names (married and maiden) should be entered in the last name field with the alternate name being in brackets after the first name. See Figure 22.

415	McBRIDE	James Irvine	1878	1966	2	1	0001	ct	CURRENT	Alexander
416	McBRIDE	Janet Aiken (nee FERGUSON)	1843	1902	2	1	0001	ct	CURRENT	Alexander
417	McCLELLAND	Bessie (Mrs CRITCHLEY)	1865	1948	24	1	0001	ct	CURRENT	Alexander

Figure 22: Example of entries with maiden names

- In all Excel files OR manual entries, “MC” or “MAC” last names (e.g... McBean and MacDonald) should **not** have a space in them. The Mc and Mac should be mixed case with the remainder being ALL CAPITALS for the last name.

1600	HARASYMCHUK	Fedor (Fred)	STC	1981	Mar 11	o
1606	HARRIS	G.G. (Rev.)	MT	1981	Apr 2	o
1622	HAWKER	Alfred Edgar (Ed)	PPDG	1981	Dec 04/07/16	o

Figure 23: Example of entries with alternate names

- Remove or replace all punctuation as listed in previous section called “Making a file with Microsoft Excel” on page 20.
- Use four digit years 1999.
- Do not use the following characters:
 - o Percent %
 - o Pipe, which is a vertical line
 - o “Dittos”, which means “Same as above.”

Creating CSV files for bulk upload

Appendix D: Preparing PDF files

Digital documents

All existing files that could be read with the existing hardware/software have been addressed. We will prioritize collections for future treatment based on factors such as the value, importance, and needs of the collection, as well as the anticipated level of use for the collection.

There are five steps for creating digital copies of documents for which there is presently no digital file:

1. Scanning to capture an image of each page in the document.
2. Converting the image to a document, usually a Word file, but can also be a PDF or Excel file, using OCR (Optical Character Recognition) software.
3. Proofing, where we correct any of the errors made in the OCR process.
4. Indexing and file preparation – file naming, organizing, inserting structured formatting to the document.
5. Verifying, which is the final check of the file to ensure it is ready to be loaded into the database.

Note that only about 500 of our 1300 cemetery files are digital so there is still much work to be done.

Updating the cemetery collection: some of the cemetery transcriptions were completed 40 years ago and so need updating to include recent burials. We have to develop procedures for managing these new transcriptions and keeping the indexes in sync.

Appendix E: Table specifications

Baptism	Column name	FirstName	LastName	ChurchID	Info	TypeCode	StatusCode
	Null Status	null	null	not null	null	null	null
	Data Type	varchar	varchar	varchar	varchar	char	varchar
	Length	128	128	8	256	3	8

Births	Column name	LastName	FirstName	Sex	Birth	PlaceOfBirth	Parents
	Null Status	null	null				
	Data Type	varchar	varchar				
	Length	128	128				

Births (continued)	Column name	Other	TypeCode	StatusCode
	Null Status	null	null	null
	Data Type	varchar	char	varchar
	Length	128	3	8

Book record	Column name	LastName	FirstName	BookCode	PageNumbers	EventYear	Info	TypeCode	StatusCode
	Null Status	null	null	not null	null	null	null	null	null
	Data Type	varchar	varchar	varchar	varchar	int	varchar	char	varchar
	Length	128	128	6	64		128	3	8

Books	Column name	BookCode	BookTitle	Author	BookDescr	DEWEY	StatusCode
	Null Status	not null	not null	null	null	null	null
	Data Type	varchar	varchar	varchar	varchar	varchar	varchar
	Length	6	128	128	256	15	8

Appendix E: Table specifications

Burial	Column name	FirstName	LastName	ChurchID	Info	TypeCode	StatusCode
	Null Status	null	null	not null	null	null	null
	Data Type	varchar	varchar	varchar	varchar	char	varchar
	Length	128	128	8	256	3	8

Cemeteries	Column name	CemCode	CemDescr	GPS_Lat	GPS_Long	Municipality	Town	CemDescr_MHS	Cemeteries (continued on next line)
	Null Status	null	null	null	null	null	null	null	
	Data Type	varchar	varchar	varchar	varchar	varchar	varchar	varchar	
	Length	32	512	64	64	128	128	512	

Cemeteries (continued)	Column name	LegalDescr	CemLink	Notes	Status Code
	Null Status	null	null	null	null
	Data Type	varchar	varchar	varchar	varchar
	Length	128	512	512	8

Cemetery Records	Column name	LastName	FirstName	Birth	Death	PageNumber	CemeteryID	CemID	Cemetery Records (continued on next line)
	Null Status	null	null	null	null	null	not null	not null	
	Data Type	varchar	varchar	int	int	varchar	int	varchar	
	Length	128	128			128		8	

Cemetery Records (continued)	Column name	TypeCode	StatusCode
	Null Status	null	null
	Data Type	char	varchar
	Length	2	8

Appendix E: Table specifications

Cemetery Transcriptions	Column name	Name	Description	Municipality	Price	Shipping	Download	StatusCode
	Null Status	null	null					null
	Data Type	varchar	varchar					varchar
	Length		128					8

Census 1827 / 1831 / 1834	Column name	Page	Settlement	LastName	FirstName	Age	Country	Religion	Married Men	Census 1827 / 1831 / 1834 (continued on next line)
	Null Status	null	null	null	null	null	null	null	null	
	Data Type	int	varchar	varchar	varchar	int	varchar	varchar	int	
	Length		128	128	128		128	128		

Census 1827 / 1831 / 1834 (continued)	Column name	UnMarriedMen	Married Women	UnMarried Women	Sons Above16	Sons Under16	Daughters Above15	Daughters Under15	Servent Male	Census 1827 / 1831 / 1834 (continued on next line)
	Null Status	null	null	null	null	null	null	null	null	
	Data Type	int	int	int	int	int	int	int	int	
	Length									

Census 1827 / 1831 / 1834 (continued)	Column name	Servent Female	Total	TypeCode	Status Code
	Null Status	null	null	null	null
	Data Type	int	int	char	varchar
	Length			3	8

Census 1870	Column name	Page	Line Number	LastName	FirstName	Sex	Parish	PlaceOf Birth	Census 1870 (continued on next line)
	Null Status	null	null	not null	null	null	null	null	
	Data Type	int	int	varchar	varchar	varchar	varchar	varchar	
	Length			128	128	6	128	128	

Census 1870 (continued)	Column name	Age	Fathers Name	Colour	MaritalStatus	NotesOn Original	Additional Data	TypeCode	Census 1870 (continued on next line)
	Null Status	null	null	null	null	null	null	null	
	Data Type	int	varchar	varchar	varchar	varchar	varchar	char	
	Length		128	128	128	128	128	3	

Census 1870 (continued)	Column name	Status Code
	Null Status	null
	Data Type	varchar
	Length	8

Appendix E: Table specifications

Census 1891	Column name	Location Number	District Name	District	Sub District	SD	Page	Family Number	Census 1891 (continued on next line)
	Null Status	null	not null	null	not null	null	null	null	
	Data Type	varchar	varchar	int	varchar	varchar	int	int	
	Length	128	128		128	128			

Census 1891 (continued)	Column name	Last Name	FirstName	Sex	Age	Married Widowed	Relationship ToHead	Coun ProvOf Birth	Census 1891 (continued on next line)
	Null Status	not null	null	null	null	null	null	null	
	Data Type	varchar	varchar	varchar	int	char	varchar	varchar	
	Length	128	128	6		1	128	128	

Census 1891 (continued)	Column name	Birth Father	Birth Mother	Religion	Occupation	TapeCode	TypeCode	Status Code	Census 1891 (continued on next line)
	Null Status	null	null	null	null	null	null	null	
	Data Type	varchar	varchar	varchar	varchar	varchar	char	varchar	
	Length	128	128	20	128	6	3	8	

Appendix E: Table specifications

Census 1901	Column name	LastName	FirstName	MiddleName	Age	District	SubDistrict	SubDistrict Name	Census 1901 (continued on next line)
	Null Status	not null	null	null	null	not null	not null	null	
	Data Type	varchar	varchar	varchar	int	varchar	varchar	varchar	
	Length	128	128	128		128	128	128	

Census 1901 (continued)	Column name	Reel	Page	TypeCode	StatusCode
	Null Status	null	null	null	null
	Data Type	varchar	int	char	varchar
	Length	6		3	8

ChurchMarriages	Column name	FirstName	LastName	Info	ChurchID	TypeCode	StatusCode
	Null Status	null	null	null	not null	null	null
	Data Type	varchar	varchar	varchar	varchar	char	varchar
	Length	128	128	256	8	3	8

Churches	Column name	ChurchName	Municipality	MGSNumber	Info	Denomination	TypeCode	StatusCode
	Null Status						null	null
	Data Type						char	varchar
	Length						3	8

Countries	Column name	CountryName	StatusCode
	Null Status	null	null
	Data Type	varchar	varchar
	Length	255	8

Appendix E: Table specifications

Marriages	Column name	GroomLast Name	GroomFirst Name	GroomFrom	BrideLast Name	BrideFirst Name	BrideFrom	Marriages (continued on next line)
	Null Status	not null	null	null	not null	null	null	
	Data Type	varchar	varchar	varchar	varchar	varchar	varchar	
	Length	128	128	128	128	128	128	

Marriages (continued)	Column name	EventYear	Place	SourceName	SourceDate	TypeCode	StatusCode
	Null Status	null	null	not null	null	null	null
	Data Type	int	varchar	varchar	int	char	varchar
	Length		128	128		3	8

Municipalities	Column name	MunName	ProvID	statusCode
	Null Status	not null	not null	null
	Data Type	varchar	int	varchar
	Length	128		8

Newspapers	Column name	NewspaperCode	NameOfNewspaper	StatusCode
	Null Status	not null	not null	null
	Data Type	varchar	varchar	varchar
	Length	4	128	8

Obituaries Rural	Column name	LastName	FirstName	PaperCode	Dates	EventYear	Info	TypeCode	StatusCode
	Null Status	not null	null	null	null	null	null	null	null
	Data Type	varchar	varchar	varchar	varchar	int	varchar	char	varchar
	Length	128	128	5	64		128	3	8

Appendix E: Table specifications

Obituaries Win Pap	Column name	LastName	FirstName	EventYear	FreePress	Tribune OrSun	CemID	TypeCode	StatusCode
	Null Status	not null	null	not null	null	null	null	null	null
	Data Type	varchar	varchar	int	varchar	varchar	int	char	varchar
	Length	128	128		25	25		3	8

Appendix E: Table specifications

Provinces	Column name	Province	StatusCode
	Null Status	not null	null
	Data Type	varchar	varchar
	Length	32	8

ServentRecord	Column name	FirstName	LastName	LocationCode	NameDocument	Date	MicroFilm Reference Number	ServentRecord (continued on next line)
	Null Status	not null	null					
	Data Type	varchar	varchar					
	Length	128	128					

ServentRecord (continued)	Column name	Age	Origin	Work Location	Notes	TypeCode	StatusCode
	Null Status					null	null
	Data Type					char	varchar
	Length					3	8

Type Codes	Column name	TypeDescr	StatusCode
	Null Status	not null	null
	Data Type	varchar	varchar
	Length	30	8

Glossary

Term	Definition
cell	The entire spreadsheet is composed of rows and columns of cells. A spreadsheet cell is comparable to a field in database.
column	A column is a vertical set of cells. A column will contain a set of data values of a particular simple type. Each cell in the column will have the same type of data (for example, numbers or text) for each row of the table. The columns provide the structure according to which the rows are composed.
CSV	Comma Separated Values. A file that stores tabular data (numbers and text) in plain-text form. CSV file contains a number of records, separated by line breaks of some kind. Each record consists of fields, separated by commas or tabs.
Development database	Contains records that volunteers are working on and have not yet been approved on.
Excel	Software that allows you to organize, format, and calculate data with formulas. It using a spreadsheet system broken up by rows and columns.
field	A space allocated for a particular item of information. In <i>database</i> systems, <i>fields</i> are the smallest units of information you can access.
field - key	The key or most important field. A field in a record that holds unique data which identifies that record from all the other records in the file or database.
filter	A computer software program that selectively narrows down or screens out incoming information.
KOHA	An online catalogue of all books and reference material held in the library, searchable by title, author and keyword. KOHA is an open-source integrated library system used by many libraries throughout the world.
link	A segment of text in a webpage that, when clicked, causes another webpage to be displayed
MANI	The MAnitoba Name Index
MGS	Manitoba Genealogical Society
parentheses	Also known as round brackets ()
PDF	Portable Document Format. A type of file that is an electronic image of text and graphics. A PDF looks like a printed document and can be viewed, printed, and electronically transmitted.
Production database	Contains records that members can see and use. These records are also referred to as “live” records.
query	Request for information
record	A <i>record</i> is a <i>database</i> entry that may contain one or more values. Groups of <i>records</i> are stored in a table,
row	A row—also called a record—represents a single, implicitly structured data item in a table. Example: a church record.
SQL	Structured Query Language. A standard interactive and

	programming language for getting information from and updating a database.
table	A table contains a series of records. A table contains cells (values) set up in vertical columns (identifiable by name, for example Event Year) and horizontal rows (records). A table has a specified number of columns, but can have any number of rows (records).
templates	A file that serves as a starting point for a new document. When you open a template, it is pre-formatted in some way.
upload	To transfer (software, data, character sets, etc.) from a smaller to a larger computer.

Index

- account 3, 6, 16
- alternate names .. 14, 24, 25
- book**..... 7, 12, 13, 23
- bulk..... 4, 12, 20, 22
- cemetery**7, 8, 15, 19, 23, 26
- CSV** ... 11, 12, 20, 21, 22, 23, 36
- development** 1, 10, 36
- edit3, 5, 6, 10, 11, 12
- error report 6, 16, *See* MANI error reporting system
- Excel.. 15, 20, 21, 22, 23, 24, 26, 36
- filter..... 9, 36
- KOHA.....13, 23, 36
- link 2, 3, 6, 11, 12, 16, 20, 36
- maiden names ... 14, 24, *See* alternate names
- MANI error reporting system 16
- marriage 8, 19
- name 1, 14, 23, 24, 36
- newspaper..... 17, 19
- password 16
- PDF.....15, 26, 36
- production**.....1, 10, 36
- query36
- record 7, 8, 9, 10, 11, 12, 14, 15, 16, 19, 20, 36
- search 1, 4, 9, 16, 20, 21, 24
- table.. 3, 5, 6, 7, 8, 9, 10, 12, 20, 21, 23
- template 20, 22, 37
- updating..... 11, 15, 26, *See* edit, *See* edit
- upload... 3, 4, 11, 12, 13, 20, 21, 22, 23, 37



Manitoba
Genealogical
Society

MANItoba
The MAnitoba Name Index



MANI Users Manual
A procedural guide for MGS Volunteers