



DATA EXCHANGE UTILITY VERSION 2.0
REFERENCE MANUAL

Banner Blue Software Incorporated
Fremont, California

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About Your Data Exchange Utility Diskette and Manual

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INTRODUCTION

The Data Exchange Utility is a program that converts Family Tree Maker card files to GEDCOM or ASCII format. It also converts GEDCOM files to Family Tree Maker card files. You can choose all or a portion of the items recorded about each person to include in the converted files.

GEDCOM is a standard file format for exchanging information between genealogy programs. The acronym GEDCOM stands for GENEalogical Data COMMunications. The Family History Department of the Church of Jesus Christ of Latter-day Saints (LDS Church) developed the GEDCOM standard.

Use GEDCOM to transfer information (without retyping) into Family Tree Maker from another genealogy program that supports GEDCOM. Then you can print beautiful family trees not possible in the other program.

ASCII files contain no information about who is a person's mother, father, brother, or sister. They are simple lists of information. ASCII information only transfers out of Family Tree Maker, not back in.

When used with other software, ASCII files let you prepare detailed reports not possible within Family Tree Maker. Use ASCII files to create a tabular list of information to load into your word processor. The Data Exchange Utility can also prepare a comma delimited ASCII file that loads into most databases.

Additionally, you can convert the information from Individual Card 4 – Notes to ASCII. Most word processors read ASCII, so you can bring your Notes into your favorite word processor for additional formatting or fancier printing.

SYSTEM REQUIREMENTS

The Data Exchange Utility requires a minimum of 512Kb of RAM (memory) and either two floppy disk drives or a hard disk. The more RAM you have available, the larger size files you can convert from one format to another.

If you want to see how much RAM is available to the Data Exchange Utility, choose **P – Program setup/status** from the Main Menu.

CUSTOMER ASSISTANCE

If you have any problems using the Data Exchange Utility, take these steps in the order listed:

1. Check the Index in this manual for a listing of the subject you need help on.
2. Call Banner Blue Technical Support. The hours are Monday through Friday, 8:00 AM to 5:00 PM, Pacific time. Our number is 510-794-6850 (ask for Technical Support). We can help you best if you call while you are at your computer.

PRODUCT UPGRADE PLAN

Periodically we make new versions of our software available to owners at substantial discounts.

ABOUT MAILING LISTS

We don't sell our registration list to other companies, and we have no intention to do so. Your name will be confidential and used only by Banner Blue.

WE WANT TO HEAR FROM YOU!

Banner Blue continually improves its products. We encourage you to write us and share your ideas about how we can improve the Data Exchange Utility. Our address is:

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PROGRAM SETUP

This section tells you how to set up and start the Data Exchange Utility on your computer system.

INSTALLING AND STARTING THE DATA EXCHANGE UTILITY ON A HARD DISK SYSTEM

Banner Blue recommends that you install the Data Exchange Utility in its own subdirectory on your hard disk. That way you avoid mixing the Data Exchange Utility files with files produced by other programs.

Follow these steps to install the Data Exchange Utility from drive A to your hard disk:

1. Place a write protect tab on the original Data Exchange Utility diskette (on 3.5" diskettes, push the black tab up).
2. Insert the Data Exchange Utility program diskette in drive A.

Note: If you are going to install the Data Exchange Utility into a subdirectory on your hard disk, make that subdirectory the current directory.

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3. From the DOS prompt for your hard disk (normally C>), type **A:HD** and press Enter . A message appears on the screen to tell you that installation is taking place. This procedure copies the files from drive A to the current drive and directory (usually drive C).

Note: If you are installing from a diskette drive other than drive A, do not use the instructions above. Use the DOS COPY command instead. Refer to your DOS manual for instructions.

When you have completed the installation process, store the original Data Exchange Utility diskette in a safe place.

Follow these steps to start the Data Exchange Utility from your hard disk:

1. Make sure the DOS prompt for your hard disk (normally C>) is on your screen.
2. If you installed the Data Exchange Utility into a subdirectory, make this subdirectory the current directory.
3. Type **EXCHANGE** and press Enter . After several seconds you see the Data Exchange Utility title screen and Main Menu.

If this is the first time you have used the Data Exchange Utility, proceed to the section "Program Setup/Status" on page 4.

INSTALLING AND STARTING THE DATA EXCHANGE UTILITY ON SYSTEMS WITHOUT A HARD DISK

Note: Do not run the Data Exchange Utility from the original Data Exchange Utility diskette. Make a backup copy of the diskette and store the original in a safe place.

Follow these steps to make a backup copy of the Data Exchange Utility on a two-diskette drive system:

1. Place a write protect tab on the original Data Exchange Utility diskette (on 3.5" diskettes, push the black tab up).
2. Insert the Data Exchange Utility program diskette in drive A.
3. Insert a blank, formatted, double-sided diskette in drive B.
4. From the DOS A> prompt, type **BU** and press Enter . This command will copy all the files from the diskette in drive A to the diskette in drive B.

When you have completed the installation process, store the original Data Exchange Utility diskette in a safe place.

To start the Data Exchange Utility on a two-diskette drive system, follow these steps:

Note: Before starting the Data Exchange Utility on a two-diskette drive system, have a blank, formatted diskette available for saving files.

1. Make sure your backup copy of the Data Exchange Utility is NOT write protected. During Program Setup, the Data Exchange Utility needs to write information to your backup copy of the program diskette.
2. Insert your backup copy of the Data Exchange Utility program diskette in the default drive, usually drive A. Place the blank formatted diskette for saving card files in the second drive, usually drive B.
3. At the default DOS prompt (usually A>), type **EXCHANGE** and press Enter . After several seconds you see the Data Exchange Utility title screen and Main Menu.

Note: Do not remove the backup copy of the Data Exchange Utility program diskette from the diskette drive while you are using the program. Remove it only after quitting the program.

If this is the first time you have used the Data Exchange Utility, proceed to the next section, "Program Setup/Status."

PROGRAM SETUP/STATUS

Program setup/status lets you choose a palette of colors for your computer display. It also shows status information such as the amount of RAM (memory) available to the Data Exchange Utility.

To select the palette of colors for your computer display, select **P – Program setup/status** from the Main Menu and press Enter . On some computer displays, all palettes look the same. If this is the case for your computer, the Data Exchange Utility tells you so.

Use or to highlight your choice, then press Enter .

HELP

You can get help at any time while running the Data Exchange Utility by pressing .

WHERE TO GO FROM HERE

If you have asked the Data Exchange Utility to save card files to one of the diskette drives on your computer, you need to have a blank formatted diskette ready before you convert any files. If you do not have one available, quit the Data Exchange Utility now and format a blank diskette.

To quit the Data Exchange Utility, select **Quit** from the Main Menu.

IMPORT FROM GEDCOM

The Data Exchange Utility can convert a GEDCOM file produced by another program to a Family Tree Maker card file. This is called “importing” a GEDCOM file. Once you import the GEDCOM file, you can quit the Data Exchange Utility, start Family Tree Maker, and load the imported file as if it were created in Family Tree Maker.

If you have 640Kb of available memory, you can import GEDCOM files containing up to 1,200 individuals.

Note: If your GEDCOM file contains more than 1,200 individuals, you need to return to the program that produced the GEDCOM file. Then create another GEDCOM file with 1,200 or fewer individuals.

Note to PAF users: The Data Exchange Utility works only with PAF version 2.1 or higher.

To import from GEDCOM, follow these steps:

1. Select **I – Import from GEDCOM** from the Main Menu.

The Data Exchange Utility displays the screen labeled “**Import, Step 1 of 3 – Get GEDCOM File from Disk.**”

2. Select the GEDCOM file to import and press Enter .

Note: GEDCOM filenames must have the extension **.GED**

The Data Exchange Utility scans the GEDCOM file you selected. This may take some time depending on the size of the file and the speed of your disk drive.

After scanning the file, the Data Exchange Utility displays the screen labeled “**Import, Step 2 of 3 – Assign GEDCOM tags to FTM fields.**”

Note: FTM is an abbreviation for Family Tree Maker.

3. Now you must tell the Data Exchange Utility what pieces of information to import.

Note: The Data Exchange Utility automatically places names, birth, death, and marriage information into the proper Family Tree Maker fields. If that is the only information you wish to import, you may skip this step by pressing **[F10]** to continue.

One at a time, highlight the name of each FTM field into which you wish to place information from the GEDCOM file. Then press Enter .

The Data Exchange Utility pops up another window with a list of the tags in the GEDCOM file. A “tag” labels a piece of information (for example, the tag for Occupation is OCCU). You see only the tags actually used in the GEDCOM file.

Select a tag that describes the information you want to place in the current Family Tree Maker field. The Data Exchange Utility closes the window, allowing you to repeat the process until you have assigned all the GEDCOM tags to FTM fields. You can assign as many or as few tags as you like.

A GEDCOM tag of NONE assigned to an FTM field means the field will be empty. Often you will not have information for every FTM field.

When GEDCOM files store Notes (lengthy paragraphs of information about an individual) they cannot store full paragraphs. They actually store each line separately. If you choose to import Notes into Family Tree Maker, each line will be followed by a carriage return (even though you don't see the , it's there).

Sample Notes in a word processor

A brief story about Abraham Lincoln.

He volunteered and became a Captain in the Black Hawk War of 1832. He commented afterwards that he saw no live, fighting Indians, but had a good many bloody struggles with the mosquitoes.

Sample Notes in a GEDCOM file

A brief story about Abraham Lincoln.

He volunteered and became a Captain in the Black Hawk War of 1832. He
commented afterwards that he saw no live, fighting Indians, but had a good
many bloody struggles with the mosquitoes.

Press to continue when you have completed assigning tags to fields.

The Data Exchange Utility now displays the screen labeled **“Import, Step 3 of 3 – Save Card File to Disk.”**

4. Type a name for the new, imported FTM card file and press Enter .

The Data Exchange Utility begins importing the GEDCOM file. As it imports each individual and marriage, it displays the individuals' names (you see a total of 4 importing steps).

The Data Exchange Utility gives you the option to view a list of the warnings and errors it detected. Warnings and errors are also saved in a file on your disk. The file has the same name as your new FTM card file, but with the extension **.LST**. For example, if the name of your new, imported file is **MYFAMILY.FTM**, the name of the warnings and errors file is **MYFAMILY.LST**. See page 7 for a list of common warnings and errors.

5. To work with your imported file, quit the Data Exchange Utility and start Family Tree Maker. Get the imported card file like any other card file.

Common Warnings and Errors During Import from GEDCOM

Information that Is too Long or Not Assigned to an FTM Field

Because of differences between programs, it is possible for some of the GEDCOM information to be too big to fit in a Family Tree Maker field. If some information does not fit, or if you chose not to assign some information to FTM fields, the Data Exchange Utility notifies you at the completion of the import.

Roots III GEDCOM Files

GEDCOM files prepared in Roots III may have some information that cannot be imported into Family Tree Maker. This includes: quality of evidence for dates (the **Sure** field), detail footnotes, record footnotes, and external source files. If the Data Exchange Utility finds this information, you will be warned in the LST file only once. There is not a warning for each time this information is encountered.

IMPORT FROM GEDCOM OPTIONS

Press **F5** at any time during the import process to display the screen labeled “**Import Options.**” This screen allows you to clean up information in some GEDCOM files.

Delete underscores from names? Some programs (like PAF) add an underscore between compound names (for example, St._Germaine). Select **Yes** to replace the underscore character with a space. Yes is the default choice if you do nothing. Select **No** to leave your names alone.

Add spacing in location fields? Some programs (like PAF) don't put spaces between the city, county, and state. Select **Yes** to include the normal space between these words and to delete extra commas. Yes is the default choice if you do nothing. Select **No** to leave your locations alone.

If location is too long. Some programs (like PAF) have longer location fields than Family Tree Maker does. For example, if a location is recorded as:

Warren, Trumbull County, Ohio, United States of America

Keep first part imports: Warren, Trumbull County, Ohio

Keep last part imports: Ohio, United States of America

Keep last part is the default choice if you do nothing. The Data Exchange Utility always keeps as much as possible.

EXPORT TO GEDCOM

The Data Exchange Utility can convert a Family Tree Maker card file to a GEDCOM file. This is called “exporting” to a GEDCOM file. Once you create the GEDCOM file, you can quit the Data Exchange Utility, start another genealogy program, and load the exported file.

Note: The Data Exchange Utility exports information for every individual in the Family Tree Maker card file that you select. If you want to export information for only a portion of the individuals in your card file, use the **Save selected descendants** command in Family Tree Maker. With this command you can create a new, smaller card file. Then use the Data Exchange Utility to export to GEDCOM.

To export a Family Tree Maker card file to GEDCOM, follow these steps:

1. Select **E – Export to GEDCOM** from the Main Menu.

The Data Exchange Utility displays the screen labeled “**Export, Step 1 of 4 – Get Card File from Disk.**”

2. Select the card file to export and press Enter .

The Data Exchange Utility displays the screen labeled “**Export, Step 2 of 4 – Assign FTM fields to GEDCOM tags.**”

Note: FTM is an abbreviation for Family Tree Maker.

3. Now you must tell the Data Exchange Utility what pieces of information to export.

Note: The Data Exchange Utility automatically assigns names, birth, death, and marriage information to the proper GEDCOM tags. If that is the only information you wish to export, you may skip this step by pressing **F10** to continue.

One at a time, highlight the name of each FTM field you wish to export to the GEDCOM file. Then press Enter .

The Data Exchange Utility displays another window with a list of the possible GEDCOM tags. A standard “tag” identifies each piece of information for other programs designed to read GEDCOM.

Select a tag that describes the information in the current FTM field. The Data Exchange Utility closes the window, allowing you to repeat the process until you have assigned all the FTM fields to GEDCOM tags. You can assign as many or as few fields as you like.

If you have an event (a date and a location) for which there is no GEDCOM tag, use the **EVEN** (Event) tag. You can use the **EVEN** tag more than once. Each time you use it, the label from the corresponding FTM field will be attached. Thus, you will be

able to tell one event from another. (The MISC (Miscellaneous) tag works the same way and it may be understood by some GEDCOM programs that don't understand the EVEN tag.) If you have textual information for which there is no tag, you can also use the MISC tag. You can use the MISC tag more than once. As with events, the label from the corresponding FTM field will be attached.

The Data Exchange Utility does not export an FTM field assigned a GEDCOM tag of NONE. In fact, if you have FTM fields that are empty for all individuals, you should leave the tag set to NONE. Empty fields are not exported no matter what the tag is.

When GEDCOM files store Notes (lengthy paragraphs of information about an individual) they cannot store full paragraphs. They actually store each line separately. If you choose to export your Family Tree Maker Notes, each line will be followed by a carriage return (even though you won't see the , it's there). See page 6 for an example of Notes in a GEDCOM file.

Press to continue when you have completed assigning fields to tags.

The Data Exchange Utility displays the screen labeled “**Export, Step 3 of 4 – Submitter Information.**”

4. Submitter information identifies you as the originator of this information. Fill in as much of this information as possible. This allows the person receiving your information to identify where it came from.

Note: Unit Number and Stake are for use by members of the Church of Jesus Christ of Latter-day Saints.

Important note to Ancestral File submitters: GEDCOM files exported from the Data Exchange Utility are registered for submission to the Ancestral File. It is especially important for those submitting their information to the LDS Ancestral File to completely fill out the submitter information. Also, you should now press to display **Export Options** (described below). Then select **ANSTFILE** as the Destination. Without complete submitter information and the proper destination, your file may not be accepted.

The Data Exchange Utility displays the screen labeled “**Export, Step 4 of 4 – Save GEDCOM File to Disk.**”

5. Type a name for the exported GEDCOM file and press Enter . The name must have an extension of **.GED** as in **MYFILE.GED**

The Data Exchange Utility begins exporting the GEDCOM file. As it exports each individual and marriage, it displays the individuals' names.