GFO RootsMagic SIG
Working With Facts – Examples

GFO RootsMagic SIG

Examples of How to Use The RootsMagic
Sentence Template Language and Custom Fact Types

ABOUT THIS DOCUMENT

This document is provided by the Special Interest Group (SIG) Facilitator for use by the Genealogical Forum of Oregon (GFO) RootsMagic SIG members. It provides a variety of examples presented in GFO RootsMagic SIG meetings. They follow the recommendations found in the "Working With Facts" section of the GFO RootsMgic SIG Handout. The examples discuss & demonstrate the following topics:

- Creating Sentence Templates for the Principal and Supporting Roles
- Creating new Fact Types
- Sharing Facts for a variety of reasons

The latest version of this document of examples can be found through a hyperlink within the GFO RootsMagic SIG Handout which can be found at the GFO RootsMagic SIG webpage: https://gfo.org/learn/special-interest-groups/rootsmagic.html

Barry Wolff - GFO RootsMagic SIG Facilitator – RootsMagic@gfo.org

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EXAMPLE #1 – Birth: Twins

A. **Premise:** The premise of this first example is that you have a set of Twins and you want this information included in the Birth Fact Narrative sentences for them.
   1. **Note:** This example is taken from the Online Help webpage addressing Customizing Sentences
      a. https://help.rootsmagic.com/RM9/customizing-sentences.html
      b. Scroll down to: EXAMPLE 2: ADDING A TWIN
      c. In the Online example they jump to providing a solution. I'm going to back up and walk through the 9-step process you should go through
   2. The built-in default Birth Fact sentence for the Principal would be:
      a. John Smith was born on 1 January 1900 at General Hospital in Portland, Multnomah, Oregon.
   3. **Step 1:** Draft a sample of how you want the resulting sentence to read:
      a. John Smith, twin brother/sister of Jane Smith, was born on 1 January 1900 at General Hospital in Portland, Multnomah, Oregon.
      b. Or, maybe we only want to use the sibling's first name since they are in the same family and there's no need to repeat the Surname
      c. John Smith, twin brother/sister of Jane, was born on 1 January 1900 at General Hospital in Portland, Multnomah, Oregon.
      d. Or, maybe you would want it stated a different way …
   4. **Step 2:** Replace the pieces of the sentence where the specific information will come from one of the Fact Data Fields:
      a. [Person], twin brother/sister of Jane, was born on [Date] at [PlaceDetails] in [Place].
   5. **Step 3:** Confirm the needed Optional Data Fields are active for this Fact Type:
      a. Since we haven't added a need to use the Description Data Field, no changes to the Birth Fact Type Data Fields are necessary
   6. **Step 4:** Determine if there are additional people and/or Supporting Role names that need to be included in the sentence:
      a. In this case, we know we need a Supporting Role called **[Twin]** and in John's Birth Fact we need to share it with Jane Smith; and in Jane Smith's Birth Fact we'll need to share it with John Smith.
      b. So, let's add the **[Twin]** Supporting Role to the Birth Fact Type
      c. I'm not sure we'll use the Role Name itself in the sentence, but if we did it would be all lower case, so instead of **[Twin]**, we should make the Role Name **[twin]**
      d. We can replace the name of the twin with the Supporting Role Name
         i. [Person], twin brother/sister of [twin], was born on [Date] at [PlaceDetails] in [Place].
   7. **Step 5:** Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result:
      a. The default Prefix for **[Date]** is "in/on"; the default for **[PlaceDetails]** is "at" and the default for **[Place]** is "in":
         i. [Person], twin brother/sister of [twin], was born [Date] [PlaceDetails] [Place].
   8. **Step 6:** Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank:
      a. As a general rule, you should place Conditional Brackets around each sentence segment that includes a Data Field or Supporting Role Name so that the segment is left out if that variable is blank, or Role Name is not used.
      b. [Person]<, twin brother/sister of [twin],> was born <[Date] ><[PlaceDetails] ><[Place]>.

9. **Step 7:** Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the person is Living or not:
    a. We need to test the sex of the Principal to determine whether brother or sister should be included in the resulting sentence
    b. [Person]<, twin <%brother|sister >of [twin],> was born <[Date] ><[PlaceDetails] ><[Place]>.
10. **Step 8:** Decide whether any text formatting is desired (Bold, Italics, All Caps, etc):
    a. None required for this example
11. **Step 9:** Trial & error testing:
    a. To set up for the testing, we need to assign the **[Twin]** Role from John's Fact with Jane and Jane's Fact with John
    b. Now we paste what we've assembled as the Fact Sentence Template and see if the resulting sentence matches what we wrote out in Step 1
    c. If there are issues, we figure out what was done wrong going left to right through the template and re-test until we get our desired result
    d. I this case, we see that the Full Name of the sibling appears. We forgot to add the Given (first & middle name); or maybe we just want the first name of the person. We would correct it by using either the **:given** or **:first** Field Option to the Role Name variable. Let's make it just the first name
        i. [Person]<, twin <%brother|sister >of [twin:first],> was born <[Date] ><[PlaceDetails] ><[Place]>.
12. Once we have our desired result, we need to decide whether or not this Sentence Template will become the default for the Fact Type, or just applied as a Customized Sentence Template when necessary
    a. It's up to you to decide which approach will work best for you
13. Let's make it the default Sentence Template for our file's Birth Fact Type
    a. We open the Fact Type List and find the Birth Fact Type
    b. We select it and then click on Edit
    c. Then we select the Principal Role and click on Edit Role
    d. Before we paste our new Template in, we see that we already had Template that was modified from the original built-in Template. We added Switches so that the "Unknown" statements were inserted, rather than the respective sentence segments just being left out if the Data Fields were blank
    e. Perhaps we should merge them together?
        i. Current modified SIG Birth Fact Type:
            1. [person] was born< [Date]| date unknown>< [PlaceDetails]| place details unknown>< [Place]| place unknown>.
        ii. Custom template we just created:
            1. [Person]<, twin <%brother|sister >of [twin:first],> was born <[Date] ><[PlaceDetails] ><[Place]>.
        iii. Both templates merged together:
            1. [Person]<, twin <%brother|sister >of [twin:first],> was born <[Date]| date unknown>< [PlaceDetails]| place details unknown>< [Place]| place unknown>.
14. **Additional Thoughts:**
    a. Add a Role for Identical Twins:
        i. You'd just need to add another Conditional Bracketed sentence segment like what we created for the Twin Role, and change the word "twin" to "identical twin"
            1. [Person]<, twin <%brother|sister >of [twin:first],><, identical twin <%brother|sister >of [identical twin:first],> was born <[Date]| date unknown>< [PlaceDetails]| place details unknown>< [Place]| place unknown>.
    b. Add a Role for Triplets and Identical Triplets:

i. To add these 2 situations, you'd follow the format we created for the Twins and modify the sentence segment for triplets.
ii. Remember, when more than 1 person is assigned the same Supporting Role, all the people's names will be listed when you use the Role Name variable in a Template
    1. [Person]<, twin <%brother|sister >of [twin:first],><, identical twin <%brother|sister >of [identical twin:first],><, triplet <%brother|sister >of [triplet:first],><, identical triplet <%brother|sister >of [identical triplet:first],> was born <[Date]| date unknown>< [PlaceDetails]| place details unknown>< [Place]| place unknown>.
    2. As you can see, the more situations you want to include, the longer and potentially more complex the Sentence Template becomes. Whether you can still parse it into its individual pieces or not is something each of you will need to evaluate when deciding what your Fact Type default Sentence Template should be vs having other alternate Templates that you keep in a separate text or word processor file and use by copy/pasting into the Customize Sentence window for select individual's Facts
        a. For my own database, I can't recall ever encountering triplets and I'd be surprised if there are more than about 5 sets of twins in my 7K person database and I don't think I've encountered any data to indicate whether any of the twins were identical.
        b. I'd probably want to think long and hard about whether I want to modify the default Birth Fact Type Template in my database.
        c. **Remember:** Since the Birth Fact Type is a built-in Fact, any Template changes we make would need to be manually transferred to any other database files because modified sentence templates for built-in Fact Types don't' transfer when using Drag & Drop or Importing Fact Type Lists.
            i. So, if I were to implement this template change, I should keep a record of these changes so I have a checklist to go through should I want to replicate this Template in another file
        d. Also, this is one of the Special Fact Types, so creating a Custom Fact Type to use as a preferred substitute for the built-in Birth Fact Type is not an option

EXAMPLE #2 – Birth: Doctor & Midwife

B. **Premise:** Here's another Birth Fact example. Let's say you want to record who delivered the baby in the Principal's Narrative sentence:
   1. Let's start by looking at the built-in Birth Fact Type again.
      a. Note that for the Birth Fact, there's a built-in Dr Role already defined:
         i. Principal Sentence Template is: [person] was born< [Date]>< [PlaceDetails]>< [Place]>.
         ii. Resulting Principal sentence would be: George Robert Smith was born on 1 January 1880 at General Hospital in Seattle, King, Washington Territory.
         iii. Doctor Supporting Role Sentence Template is: [ThisPerson] delivered [person]< [Date]>< [PlaceDetails]>< [Place]>.
         iv. Resulting Doctor Supporting Role sentence would be: Dr. Joe Brown delivered George Robert Smith 1 January 1880 at General Hospital in Seattle, King, Washington Territory.
         v. The Principal's built-in sentence template currently does not mention who delivered the baby. Also, as currently structured, the Doctor Role sentence will only identify Joe Brown as a doctor if:
            1. In the case of Dr. Joe Brown being a person in the database, "Dr." must be entered as his Name Prefix
            2. In the case of Dr. Joe Brown not being a person in the database and the "Just Type Name" option is used, you must include "Dr." as part of his Given Name, or Surname if you only want to refer to the doctor by their Surname
      b. What if you encounter a Person whose Birth involved a Mid-Wife?
      c. So, let's address both situations in this example
   2. **Step 1:** Draft a sample of how you want the resulting sentence to read:
      a. George Robert Smith was born on 1 January 1880 at General Hospital in Seattle, King, Washington Territory. He(she) was delivered by Dr. Joe Brown/midwife Jane Brown.
   3. **Step 2:** Replace the pieces of the sentence where the specific information will come from one of the Fact Data Fields:
      a. [person] was born on [date] at [placedetails] in [Place]. He(she) was delivered by Dr. Joe Brown/midwife Jane Brown.
   4. **Step 3:** Confirm the needed Optional Data Fields are active for this Fact Type:
      a. Since we haven't added a need to use the Description Data Field, no changes to the Birth Fact Type Data Fields are necessary
         i. I should mention that if we were planning to include the time of birth, we would need to use the Description Data Field to capture this information
         ii. However, at least regarding the people I have researched, the number of people where this information is known is quite small, so I would just add it as a Customized sentence rather than activate the Description field that I should be leaving blank 99% of the time. It would open the door to me adding unexpected data
   5. **Step 4:** Determine if there are additional people and/or Supporting Role names that need to be included in the sentence:
      a. In this case, we know we need a Supporting Role called **[Doctor]** and another Role called **[Midwife]** in George's Birth Fact
      b. The **[Doctor]** Supporting Role already exists, but we need to add the **[Midwife]** Supporting Role to the Birth Fact Type

c. I'm not sure we'll use the Role Name itself in the sentence, but if we did it would be all lower case, so we should make the Role Names all lowercase **[doctor]** & **[midwife]**
d. Since we have 2 possible Supporting Roles that might apply, we need to include both Role Names so that they can be replaced with the name of the applicable supporting person
    i. [person] was born on [date] at [placedetails] in [place]. He(she) was delivered by [doctor]midwife [midwife].
    ii. As we discussed, this assumes the "Dr." label will be entered as part of the Name and the "midwife" label will be part of the Template

6. **Step 5:** Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result:
    a. **Reminder:** The default Prefix for **[Date]** is "in/on"; the default for **[PlaceDetails]** is "at" and the default for **[Place]** is "in" so the Template should be:
        i. [person] was born [date] [placedetails] [place]. He(she) was delivered by [doctor]midwife [midwife].
7. **Step 6:** Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank:
    a. Remember: As a general rule, you should place Conditional Brackets around each sentence segment that includes a Data Field or Supporting Role Name variable so that the segment is left out if that variable is blank or Role Name is not used.
    b. [person] was born< [date]>< [placedetails]>< [place]>.< He(she) was delivered by [doctor].>< He(she) was delivered by midwife [midwife].>
8. **Step 7:** Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the person is Living or not:
    a. First, looking at the 2 conditional segments for the doctor and midwife roles, the way we've constructed the Template so far, it will include a doctor if there's a doctor Role and it will include the midwife if there's a midwife Role assigned.
        i. Theoretically, if both a doctor and a midwife Role are assigned to the same Birth Fact, you'll end up with 2 separate "He was delivered…" sentences
        ii. There isn't an RM Switch that can evaluate the presence, or not, of more than one Data Field in a single Switch. So, in this example, it means it's up to the user to be aware that if both Roles need to be applied, the user should Customize the Sentence template for that specific Birth Fact by merging the 2 Roles into a single sentence, such as:
            1. … < He(she) was delivered by [doctor] and midwife [midwife].>
    b. Next, we need to address the He(she) in our Template. In this case, instead of a Switch, we can use the **:HeShe** Field Option with **[person]**:
        i. [person] was born< [date]>< [placedetails]>< [place]>.< [person:heshe] was delivered by [doctor].>< [person:heshe] was delivered by midwife [midwife].>
9. **Step 8:** Decide whether any text formatting is desired (Bold, Italics, All Caps, etc):
    a. None required for this example
10. **Step 9:** Trial & error testing:
    a. Now we paste what we've assembled as the Fact Sentence Template and see if the resulting sentence matches what we wrote out in Step 1
    b. Looking at the resulting sentence with only the doctor Role assigned to someone we see:
        i. The "H" in He needs to be capitalized in 2 places since it is at the start of the sentence
            1. After looking at the Online Help, we see that this should be solved by adding the Capitalization Option "**:caps**" to each instance. So, our Template should be changed like this:

a. [person] was born< [date]>< [placedetails]>< [place]>.< [person:heshe:caps] was delivered by [doctor].>< [person:heshe:caps] was delivered by midwife [midwife].>

ii. Also notice that even though we haven't assigned a midwife Role, the conditional sentence segment is being included, minus a Name. That's because we've included the **[person:heshe]** variable inside the same set of Conditional Brackets as the Supporting Role variable. There's a Person to use with the Person variable and RM can't evaluate for the condition of 2 different variables needing to be present inside a single conditional segment. The rest is all of the text is included, minus the name of a person assigned the midwife Role. There are 2 ways to resolve this:

1. **Option 1 -** Instead of using **[person:heshe]**, we could insert a Gender Switch similar to our last example and use "**%He|She**" like we used "**%brother|sister**" in example #1. Since this doesn't utilize the **[person]** variable, each sentence segment only appears when the Role variable is present. So, the option 1 solution would look like this:
   a. [person] was born< [date]>< [placedetails]>< [place]>.< <%He|She> was delivered by [doctor].>< <%He|She> was delivered by midwife [midwife].>
2. **Option 2 -** we could insert a Switch that checks for the presence of the doctor and midwife Roles for their respective sentence segments. Which would look like this:
   a. [person] was born< [date]>< [placedetails]>< [place]>.< ?[doctor]| [person:heshe:caps] was delivered by [doctor].>< ?[midwife]| [person:heshe:caps] was delivered by midwife [midwife].>
   b. But when we try this, it doesn't work. Why, because you can't have a space between the first bracket and the question mark.
   c. When I inserted the switch, I inadvertently added a space in front of the switch symbol and a space in front of the 1st word of the desired sentence segment.
   d. Because of the initial space, RM isn't reading this as a Value Switch, it's interpreting it as a Simple Switch, where the first part is used when the variable is present, or true, and the 2nd part is used & evaluated when the first part is false. So, let's delete the space, resulting in:
   e. [person] was born< [date]>< [placedetails]>< [place]>.<?[doctor]| [person:heshe:caps] was delivered by [doctor].><?[midwife]| [person:heshe:caps] was delivered by midwife [midwife].>
3. I'm inclined to use Option 1, but there's nothing that really makes one better than the other beyond the template being shorter in option 1
4. Now we have our desired result for a doctor

c. Now let's assign a midwife and confirm this scenario works as expected too
   i. Share Birth Fact with Jane Brown

11. We confirm it works as expected. Now we would need to decide whether or not this Sentence Template will become the default for the Birth Fact Type, or just applied as a Customized Sentence Template when necessary
12. Additional thoughts:
    a. Back in step 7, said that there wasn't a switch that could evaluate the presence, or not of more than one data field in a single Switch.
    b. So, it would be up to the user to be aware that if both doctor and midwife Roles need to be applied that the sentence would need to be customized
    c. Although this is true, as you will see in Example #3, you can embed one Switch inside another Switch to accomplish this evaluation and avoid having to Customize a sentence for this possible situation

EXAMPLE #3 - Marriage: Best Man & Maid of Honor

C. **Premise:** The built-in Marriage Fact Type only includes a Role called Witness. It's left up to you to decide whether that means they signed documents as the official Witnesses, or just means that they attended the wedding as a guest. Also, note that the Witness Role is not included in the Couple's Principal Sentence Template. In this example, we're going to create separate Roles for key people like: Bridesmaid, Groom, Officiant, Flower Girl, etc. involved in the wedding. We've also decided to include the Best Man and Maid of Honor in the Couple's Principal Narrative Sentence

1. Let's start by looking at the built-in Marriage Fact Type:
   a. This is a Family Fact. That means the Principal Sentence Template will be applied to both the Principal Person and their Spouse
   b. **Remember:** RM uses the term Spouse to identify a couple. The Fact that 2 people form a Couple DOES NOT mean they are married. A Marriage Fact is what indicates a Couple were actually married.
   c. Let's look at the default Sentence Templates:
      i. Principal:
         1. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.
         2. Instead of **[Person]**, this Template uses **[Couple]**, which can only be used with Family Facts
            a. **[Couple]** will cause RM to include the names of both the Principal and the Spouse this Fact is associated with, if there is one associated with it
            b. **<#Couple#was|were>** is showing how the Plural Switch can be used:
               i. As I mentioned, you may or may not have identified the Spouse of the Principal Person
               ii. The Plural Switch causes RM to evaluate whether there are 1 or 2 people forming the Couple and, based on that, RM will use was, or were, in the resulting Narrative Sentence

      ii. Witness:
         1. [ThisPerson] witnessed the marriage of [couple]< [Date]>< [PlaceDetails]>< [Place]>.
         2. This is a Supporting Role Sentence Template
            a. **[ThisPerson]** is the Name variable you use in a Supporting Role Sentence Template when you want the Name of the Person the Supporting Role has been shared with to be inserted in their own Supporting Role Narrative Sentence
            b. **[Couple]** is how you can insert the Names of the Couple into the Supporting Role Sentence
            c. **Note:** Remember, you can use the information about the Principal in the Supporting Role Sentence Templates using the same variable names you use in the Principal's Template. However, to use the names of Supporting Role People, you use different name variables for the 2 different types of Templates
2. **Step 1:** Draft a sample of how you want the resulting sentence to read:
   a. George Robert Smith and Jane Doe were married on 1 January 1900 at Their Church in Portland, Oregon. The Best Man was Jim Smith and the Maid of Honor was Sue Doe.
3. **Step 2:** Replace the pieces of the sentence where the specific information will come from one of the Fact Data Fields.
   a. **Note:** In this case, we're just adding a sentence to the existing Marriage Sentence Template, so I'm starting with what's in the default Fact Type and adding to it:
   b. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>. The Best Man was Jim Smith and the Maid of Honor was Sue Doe.

4. **Step 3:** Confirm the needed Optional Data Fields are active for this Fact Type:
   a. Since we haven't added a need to use the Description Data Field, no changes to the Marriage Fact Type Data Fields are necessary
5. **Step 4:** Determine if there are additional people and/or Supporting Role names that need to be included in the sentence:
   a. We've identified a need for both a **[Best Man]** & a **[Maid of Honor]** Supporting Role
   b. So, we need to add these 2 Supporting Roles to the Marriage Fact Type
   c. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>. The [Best Man:Role] was [Best Man] and the [Maid of Honor:Role] was [Maid of Honor].
   d. Notice that each Supporting Role Name is used twice. The first with the Field Option **:Role** to specify we want the Role Name to be used, not the Person's Name, and the 2nd is where we want the Person's Name to be inserted
6. **Step 5:** Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result:
   a. **Reminder:** The default Prefix for **[Date]** is "in/on"; the default for **[PlaceDetails]** is "at" and the default for **[Place]** is "in," but we started with the default Template with this already accounted for, so nothing needs to be changed:
   b. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>. The [Best Man:Role] was [Best Man] and the [Maid of Honor:Role] was [Maid of Honor].
7. **Step 6:** Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank:
   a. **Remember:** As a general rule, you should place Conditional Brackets around each sentence segment that includes a Data Field or Supporting Role Name variable so that the segment is left out if that variable is blank, or Role Name is not used. Our challenge is to figure out how to package our new 2nd sentence so that it handles the following 4 scenarios:
      i. Both a Best Man and a Maid of Honor
      ii. A Best Man, but not a Maid of Honor
      iii. A Maid of Honor, but not a Best Man
      iv. Neither a Best Man, nor a Maid of Honor
   b. We know the Best Man segment and the Maid of Honor segment need to be separated with Conditional Brackets, but we're not sure how we're going to pull this off, yet. For now, we'll go with these 2 segments:
      i. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.< The [Best Man:Role] was [Best Man]> and <the [Maid of Honor:Role] was [Maid of Honor]>.
      ii. Looking at where I've placed the brackets, I recognize that the word "and" and the last period will always be included. For now, we'll move on to the next step, knowing that if Switches can't resolve this issue, we'll need to figure out what needs to be done during the last step, Trial & Error Testing
8. **Step 7:** Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the person is Living or not:
   a. **Note:** It took me 20-30 minutes of trial & error testing using Value Switches to handle the 4 scenarios correctly. Then, as I started to break down the steps to share, I realized I had added more Switches than were actually necessary, so I spent more time "simplifying" the final Template you see below. I'm sharing this to emphasize that creating Templates that are on the complex side will take time to figure out and involve a fair amount of trial & error:
      i. **Reminder:** As a reminder, the Online Help has this to say about the Value Switch:

1. A value switch is similar to a simple switch except that it allows you to check for a value without actually writing that value. It is indicated by a "?".
2. <?[Expression]| Show this if True. | Show this if False.>
3. It also says:
    a. The value switch takes any expression including fields in brackets and other switches.
    b. In other words, you can embed a Value Switch inside a Value Switch. But the Online Help doesn't go any further to show what it would look like

b. I tackled this example one scenario at a time:
    i. **Scenario #1:** Both Best Man & Maid of Honor – We get the correct result using the Template version we created in Step 6 without adding any Switches
    ii. **Scenario #2:** Best Man, but no Maid of Honor:
        1. Step 6 Template results in " **and** " appearing
        2. It shouldn't be there since there is no Maid of Honor sentence segment following it
        3. So, I added a Value Switch that only adds the word " **and** " when there is a Maid of Honor
        4. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.< The [Best Man:Role] was [Best Man]><?[Maid of Honor]| and ><the [Maid of Honor:Role] was [Maid of Honor]>.
c. Since I arrived at the final Template through Trial & Error Testing, I'm going to follow my 9-step process and stop here with my first attempt at adding Switches to the Template.

9. **Step 8:** Decide whether any text formatting is desired (Bold, Italics, All Caps, etc):
    a. None required for this example
10. **Step 9:** Trial & error testing:
    a. Now we paste what we've assembled as the Fact Sentence Template so far and see if the resulting sentence matches what we wrote out in Step 1 and supports all 4 Scenarios:
        i. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.< The [Best Man:Role] was [Best Man]><?[Maid of Honor]| and ><the [Maid of Honor:Role] was [Maid of Honor]>.
        ii. **Scenario #1:** Both Best Man & Maid of Honor
            1. It passes the test
        iii. **Scenario #2:** Best Man, but no Maid of Honor
            1. It passes the test
        iv. **Scenario #3:** Maid of Honor, but no Best Man:
            1. We see Scenario #3 results in " **and the**" appearing at the start of the 2nd sentence. "**and**" shouldn't appear and "**the**" should be initial caps
            2. So, I added a Value Switch around the Maid of Honor Value Switch to test for the presence of a Best Man; the reason the word "**and**" is needed, and added the lower case "**the**"
            3. Then I changed the word "**the**" in the Maid of Honor segment to "**The"** with a capital "T"
            4. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.< The [Best Man:Role] was [Best Man]><?[Best Man]|<?[Maid of Honor]| and the >>< The [Maid of Honor:Role] was [Maid of Honor]>.
        v. **Scenario #4:** Neither a Best Man, nor a Maid of Honor:
            1. We see Scenario #4 results in an extra period at the end of one of the sentences
            2. So, I added two Value Switches, one embedded in the other, to check for the presence of [Best Man] and, if not present, the presence of [Maid of Honor].
                a. If either is present, a period is included
                b. If neither is present, no period

c. This Value Switch inside another Value Switch is how you can test for the presence of 2 different things. This approach could be expanded to embed even more Value Switches should the need arise

3. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.< The [Best Man:Role] was [Best Man]><?[Best Man]|<?[Maid of Honor]| and the >>< The [Maid of Honor:Role] was [Maid of Honor]><?[Best Man]|.|<?[Maid of Honor]|.>>

vi. After stepping through all 4 scenarios and modifying the Template to address each new scenario, we need to go back and re-test each scenario to see if anything done addressing subsequent Scenarios impacted any of the earlier ones
   1. Scenario #1 results in "**the The**" appearing
   2. Scenario #2 works OK
   3. Scenario #3 works OK
   4. Scenario #4 works OK
   5. So again, we need to embed a Value Switch within a Value Switch so the word "the" with a capital "T" only appears if there isn't a **[Best Man]**
   6. [couple] <#Couple#was|were> married< [Date]>< [PlaceDetails]>< [Place]>.< The [Best Man:Role] was [Best Man]><?[Best Man]|<?[Maid of Honor]| and the >><?[Maid of Honor]|<?[Best Man]|| The> [Maid of Honor:Role] was [Maid of Honor]><?[Best Man]|.|<?[Maid of Honor]|.>>
   7. Then we re-test all 4 Scenarios to confirm we've solved all 4 Scenarios

11. Now we have our desired result, and again would need to decide whether or not this Sentence Template will become the default for the Fact Type, or just applied as a Customized Sentence Template when necessary
12. **Additional Thoughts:**
   a. Some users prefer to share Family Facts, like Marriage and Divorce, with the 2 people that form the Couple assigned to the Fact.
      i. Their goal being to insert a Narrative sentence into each Person's Timeline of Individual Events, rather than, or in addition to, having it appear later in the Person's Narrative where the Couple's Family Fact Timeline Fact Sentences appear
      ii. **Note:** Since the Marriage Fact is assigned to the Couple, sharing the Fact with the same 2 People allows you to Enhance a Narrative Report, but not risk losing the Marriage information for the Bride & Groom

EXAMPLE #4 - Parentage: Birth of Child (Point Form)

D. **Background:** In a past SIG meeting, I mentioned that some users created a Custom Individual Fact Type to address a Child's Parentage. Their reasons varied from wanting to:
   - The most common reason is to attach Source Citations that prove who the Child's Parents are, which requires a Sentence Template of some form in order for the Citation superscripts to be placed after the corresponding Fact sentence.
   - Insert Narrative sentences in each Parent's Narrative Individual Timeline a mention of the birth of each of their Children (and no Principal Template since the Child will have their Birth Fact).
   - Insert Narrative sentences in the Child and their Parents' Timelines in order to include everyone's Names using both Principal and Supporting Role Sentence Templates
     i. **Note:** The users that don't create a Principal Sentence Template for the Child enter the Parents Names in the Description Data Field so the data won't get lost in an export, and they Share the Fact with each Parent as a "Birth_of_Child" Supporting Role.
        1. They always share the Fact with the Father 1st and Mother 2nd to ensure their names are consistently listed in the same order.
        2. **Note:** If you share the Fact with both Parents at the same time, the order they will be listed is unpredictable
        3. Also, by using the actual Parent's Names from their records, rather than relying on what is entered in the Description Data Field, it ensures that when RM creates a Name Index for a Narrative Report, their names will be included for the page they appear on.
        4. **Note:** If you rely on the Names being entered in the Description Data Field, they will not trigger a need to be listed in the Report's Name Index

1. **Premise:** For this example, we're going to set our goal to create a Custom Individual Fact Type that:
   a. Allows us to include each Child's Birth Event in each Parent's Narrative Timeline
   b. We could call it Parents, Parentage or anything else that makes sense to you. For this example, it will be called: "**Parentage**"
   c. The intent is to add it to People that we have proof of who their Parents were
   d. When added, it will be assigned the same Date as the Person's Birth Fact Date, but we will assign a Sort Date order number so that it appears after the Birth Fact in the Person's Edit Person window Timeline
   e. We don't intend on using a Principal Sentence Template
   f. We just want a single Supporting Role to share with both Parents of the Principal, the Parents' Child. We'll call the Supporting Role "**birth of child**"
2. **Step 1:** Draft a sample of how you want the resulting sentence to read:
   a. **Principal:** No sentence
   b. **Supporting Role:** Birth of Child
      i. **Birth of Child:** 1 Jan 1900, John Smith, Portland, Multnomah, Oregon, age of father: 32.
      ii. **Note:** This example is showing a very different Narrative presentation style called "Point Form." I'll be discussing it more in the future as an example of something completely different from what comes as the default style in RM, but can be created by the user
   c. **Note:** Before we proceed with creating the Sentence Template for this target sentence, I thought I'd share an alternative approach that other users have developed to implement their Parentage objectives, proving that there is always more than 1 way to do just about everything in RM:
      i. Principal:
         1. Dad Smith and Mom Doe are the parents of son John Smith

   ii. Supporting Role [Parent]:
      1. John Smith's father/mother is Dad Smith/Mom Doe.
3. **Step 2:** Replace the pieces of the sentence where the specific information will come from one of the Fact Data Fields:
   a. **Principal:** No sentence
   b. Supporting Role:
      i. Birth of Child: [Date], [Person], [Place], age of father: 32.
4. **Step 3:** Confirm the needed Optional Data Fields are active for this Fact Type:
   a. **Principal:** No sentence
   b. Supporting Role:
      i. In this example, the Supporting Role sentence we drafted doesn't need the Description or Place Details Data Fields from the Principal's Fact
   c. This example requires a new Fact Type, so we need to:
      i. Open Fact Type List
      ii. Click on "**Design New Fact Type**" button
      iii. Select "**Individual Fact Type**"
      iv. Enter the Fact Type Name & an Abbreviation. We're going to use "**Parentage**" for both
      v. Now we need to:
         1. Turn on Date and Place Data fields
         2. Turn off the Description Data Field
      vi. Save the Fact Type
      vii. **Reminder:** If you recall, as part of creating & saving a new Fact Type when the Principal Role Sentence Template is left blank, RootsMagic creates a default Sentence Template for the Principal Role indicating it needs to be defined
      viii. Since we don't want a Sentence for the Principal, we need to go back now:
         1. Select & edit the new Fact Type
         2. Select & Edit the Principal Role
         3. Delete the default Sentence Template that RootsMagic created
5. **Step 4:** Determine if there are additional people and/or Supporting Role names that need to be included in the sentence:
   a. **Note:** Normally we would be going through this 9-step process the first time for the Principal Role. In this example there isn't a Principal Role sentence
   b. We've already identified the need for the Supporting Role "**Birth of Child**", but in this case it's not going to be included in the Principal Sentence Template.
   c. This is the Step where we make sure the needed Supporting Roles get created:
      i. Edit the Fact Type "**Parentage**"
      ii. Click on Add Role
      iii. Assign the desired name to the new Role:
         1. **Remember:** If you think you might end up using the Role Name in your Sentence Template, you should think about how the Role Name should be entered and whether it should be entered the way you want it to appear when used in a Template
         2. In our case, based on the Role Sentence we wrote out, we know we intend on using the Role Name, so we have 2 options:
            a. Either enter it in all lower-case text and rely on the various Field Options for controlling capitalization:
            b. Or, enter it with the capitalization the way we want it to appear

c. When we get to Step 9, we'll figure out how we want it to be set up for our situation. For now, we'll set the Supporting Role name to "**birth of child**", all lower case

iv. Since we're still defining it, we'll leave the Supporting Role Sentence Template blank and return to it after completing Step 9

v. So, we want the Supporting Role name in our Sentence Template, not the name of the Person the Role is shared with. Let's it figure out:
   1. There isn't a variable specifically for the name of the Supporting Role assigned to the Person
   2. **Reminder:** For Supporting Roles, "**ThisPerson**" is the variable for the Person's Name the Fact was Shared with, not "**Person**" which is the variable for the Name of the Principal for the Fact
   3. There's a Person Option "**:Role**" that, when added to "**ThisPerson**" will use the Role Name assigned to the Person instead of the Supporting Role Person's Name

vi. There's another option to consider, we could just keep it simple and hard code a text string in the Sentence Template:
   1. We're not planning to create a bunch of different Supporting Roles where we might want to re-use the same Template for each Role
   2. As we'll see when we get to Step 9, Trial & Error Testing, we have some testing to do to get it the way we want it if we use variables and options

vii. So, for now, we'll include both to remind us to figure out what we really want later during testing

viii. **Birth of Child/ [ThisPerson:Role]:** [Date], [Person], [Place], age of father: 32

6. **Step 5:** Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result:
   a. **Reminder:** The default Prefix for **[Date]** is "in/on"; the default for **[PlaceDetails]** is "at" and the default for **[Place]** is "in":
      i. Based on the Point Form Style in this example, we don't want any of these default Prefixes to be inserted by RootsMagic
      ii. Scroll down to **Place & Description Prefix Options** on the Sentence Template Language Online Help webpage
         1. We see that the Option "**:Plain**" suppresses the default Prefix
         2. Then, looking at **Date Options**, we see that "**:Plain**" also suppresses the default Prefix for Date
   b. Also, the age in years of the Person assigned the Supporting Role requires the use of the "**:Age**" Field Option, which would be **[ThisPerson:Age]**
   c. Birth of Child/ [ThisPerson:Role]: [Date:Plain], [Person], [Place:Plain], age of father: [ThisPerson:Age].
7. **Step 6:** Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank:
   a. **Remember:** As a general rule, you should place Conditional Brackets around each sentence segment that includes a Data Field or Supporting Role Name variable so that the segment is left out if that variable is blank, or Role Name is not used.
   b. Birth of Child/ [ThisPerson:Role]: <[Date:Plain], >[Person], <[Place:Plain], ><age of father: [ThisPerson:Age]>.
8. **Step 7:** Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the person is Living or not:
   a. We need a switch to test the sex of the Person assigned to the Supporting Role in order to determine whether father or mother should be included in the resulting sentence
   b. Birth of Child/ [ThisPerson:Role]: <[Date:Plain], >[Person], <[Place:Plain], ><age of <%father|mother>: [ThisPerson:Age]>.
9. **Step 8:** Decide whether any text formatting is desired (Bold, Italics, All Caps, etc):

a. For the Point Form Style, the text up to the first colon needs to be Bolded
b. Birth of Child/ [ThisPerson:Role]: <[Date:Plain], >[Person], <[Place:Plain], ><age of <%father|mother>: [ThisPerson:Age]>.

10. **Step 9:** Trial & error testing:
    a. Now we paste what we've assembled as the Fact Sentence Template for the Birth of Child Supporting Role and see if the resulting sentence matches what we wrote out in Step 1:
    b. Birth of Child/ [ThisPerson:Role]: <[Date:Plain], >[Person], <[Place:Plain], ><age of <%father|mother>: [ThisPerson:Age]>.
        i. Looking at our initial results:
            1. We need to clean up the intro that we discussed back in step 4:
                a. We see the text we entered gave us exactly what we wanted
                b. We see the variable with the "**:Role**" Option yielded it in all lower-case
                c. Let's try applying "**:Proper**" to see how it works
                    i. As you can see, it capitalized the first letter of each word
                d. This is an example of 2 ways to achieve the same result. One way is simple and the other, more complex.
                    i. This example has only 1 Supporting Role
                    ii. If there were a series of Roles, with similar lead-ins, perhaps using variables might be an easy way to ensure all the Role Sentence Templates followed the same structure
                    iii. Following the Keep It Simple approach, we'll go with hard coding the text
                e. Birth of Child: <[Date:Plain], >[Person], <[Place:Plain], ><age of <%father|mother>: [ThisPerson:Age]>.
            2. **Place –** do we want the entire place (town, county, state, country), or would it be better to just include the 1st portion using "**:First**"?
                a. I think using "**:First**", resulting in just the Town name, is too short
                b. I also think including everything, including the Country is probably too long
                c. **Note:** The other option available in RootsMagic is to use the abbreviated version of the Place.
                    i. We haven't covered "Working With Places" yet but in order to use it, you must manually define each desired Place by entering the abbreviation on the Place Page.
                    ii. Then you can use the "**:Short**" Place Option
                d. Rather than get ahead of ourselves, since learned about entering preferred abbreviated place names, for now we'll use the entire Place Name
                e. Birth of Child: <[Date:Plain], >[Person], <[Place:Plain], ><age of <%father|mother>: [ThisPerson:Age]>.
            3. Lastly, it appears the use of "**:Age**" has a Prefix that needs to be suppressed:
                a. Looking at "**Age Options**" in the Oline Help, we see that we should add "**:Plain**" so that just the number of years will be displayed
            4. Birth of Child: <[Date:Plain], >[Person], <[Place:Plain], ><age of <%father|mother>: [ThisPerson:Age:Plain]>.
        ii. Now that we have it displaying what we want when all the necessary data is entered, we need to test it out to confirm it will display correctly when some of the Data Fields are not filled in.
        iii. We have the following Scenarios to test:
            1. **Scenario #1:** No Fact Date, which also affects the ability to calculate the Supporting Person's Age

a. The comma at the end of the **[Place]** segment needs to be moved to the beginning of the Age segment
b. Birth of Child: <[Date:Plain], >[Person], <[Place:Plain]><, age of <%father|mother>: [ThisPerson:Age:Plain]>.

2. **Scenario #2:** No Place
   a. The comma at the end of the **[Person]** segment should be moved to the beginning of the **[Place]** Segment
   b. Birth of Child: <[Date:Plain], >[Person]<, [Place:Plain]><, age of <%father|mother>: [ThisPerson:Age:Plain]>.
3. **Scenario #3:** No Sex for the Supporting Person
   a. To test, we change the Supporting Person's **Sex** to "**Unknown**"
      i. We see that the result implies the Person is a male and uses "father"
      ii. We set up the Gender Switch to only handle the obvious Male & Female settings.
      iii. Although you might consider what we've put together "good enough" because you believe everyone in your database will be identified as either Male or Female, that's not going to always be the case.
   b. Let's go ahead and address how an Unknown Sex should be handled in the Template:
      i. Per the Online Help, we just need to add a vertical line to create the 3rd result section for an Unknown Gender
      ii. When we add it, and the Sex is set to Unknown, we see that we get "… age of: 20."
      iii. It would read better if it had "**parent**" where we were inserting "father" & "mother"
      iv. Birth of Child: <[Date:Plain], >[Person]<, [Place:Plain]><, age of <%father|mother|parent>: [ThisPerson:Age:Plain]>.
4. **Scenario #4:** Sex is female
   a. To test, we change the Supporting Person's sex to "Female"
   b. No issues, the Gender Switch works as expected
5. **Scenario #5**: No Birth Date (or Christen Date) to calculate Age from
   a. It appears the change we made for Scenario #1 also works for Scenario #4. No additional changes appear to be needed

iv. So, our final Sentence Template is:
   1. Birth of Child: <[Date:Plain], >[Person]<, [Place:Plain]><, age of <%father|mother|parent>: [ThisPerson:Age:Plain]>.

11. Now that we have our desired result, we need to cut/paste this Sentence Template to the Fact Type Supporting Role for Birth of Child
12. **Additional Thoughts:**
    a. This new Custom Fact Type can be used to attach Parentage Source Citations
    b. The Shared Supporting Role and corresponding Sentence Template allows you to Enhance the Individual Timeline Narrative of the Child's Parents by including the birth of their children
    c. Even though there isn't a Sentence Template for the Principal, should we ever transfer the data in RootsMagic to Ancestry, FamilySearch or to many other genealogy software programs, even though the Shared Fact Role may not transfer, the Parentage Fact and tagged Source Citations linked to the Fact added to the Child will not be lost, along with whatever information you enter in the Description Data Field

EXAMPLE #5 - Non-Married Couples

E. **The Setup:** This next example is not about crafting specific Sentence Templates. It's about looking at the big picture before proceeding and how that might change your approach regarding implementing Fact Types, Principal Sentence Templates, Shared Facts, Supporting Roles and corresponding Supporting Role Sentence Templates.
   1. **Premise:** We rely on the presence of a Marriage Fact to confirm a Couple was actually married. There are several other scenarios regarding the relationship of a Couple that can be encountered in our research that RootsMagic does not have a built-in Fact Type to support documenting them. Scenarios such as:
      a. A Couple that never married, but they considered themselves "Partners"
         i. You could consider a creating Partner Fact Type:
            1. Similar to the Parentage Fact Type example #4; it would provide a Fact to attach your Source Citations documenting how you know they were "Partners"
            2. And you can create a Partner Sentence Template that could be included in their Narrative reports
      b. A Couple that you believe were married, but have not found any records to "Prove" that they were, or were never married:
         i. Many users choose to add nothing until they have some form of Proof
         ii. While some users feel they need to identify that the Couple was married because they feel if they are a Couple, they must have been married (especially for older generations)
         iii. You might want a tailored Narrative sentence that captures your belief a marriage existed, but has not been proven
      c. A Child that has only 1 "Parent" due to extenuating circumstances (unknown father, violence, artificial insemination, etc):
         i. In these cases, the biological Spouse would not have a record in RootsMagic and RootsMagic would identify the Spouse as "Unknown Spouse"
         ii. You might want a tailored Narrative sentence that captures the circumstances of the Couple coming together and having a Child
      d. A single person that never married, never had a partner and never had a child
         i. Some users want to add something so they stop spending valuable research time trying to find a non-existent partner, when they determined one does not exist as a result of earlier research efforts
   2. All of these examples have a couple of things in common:
      a. They all involve a Couple (except the last one), so the corresponding Fact Type would typically be a Family Fact Type, not an Individual Fact Type
      b. They all involve a desire to document information about People that don't have a Marriage Fact assigned to them:
         i. Some users want to document what they know/don't know about the Couple's relationship rather than being silent
         ii. Some users rely on this to remind them they don't need to search for a Marriage record
   3. Rather than creating unique Fact Types to address each of these different situations, another approach could be to establish a single Fact Type that could be used for all of these purposes:
      a. Idea #1:
         i. Create a "**Marital Status**" Fact Type with a generic Principal Sentence Template that relies on the differentiation text to be entered into the Description Data Field
      b. Idea #2:
         i. Create a "**Marital Status**" Fact Type but don't create a Principal Sentence Template

ii. Create Supporting Roles, with tailored Supporting Role Sentence Templates that would be shared with each Person that forms the Couple
iii. Similar to the Parentage Fact Type example #4; this would allow you to attach relevant Source Citations and enhance each individual's Narrative Timeline, but only add one new Fact Type to the Fact Type List

c. Idea #3:

i. Create a "**Marital Status**" Fact Type and tailor what outputs you do/don't want it included in the output settings for the Fact Type and use it solely as a Status Fact Type with no sentence templates

EXAMPLE #6 - Death: Young Child or Parent

F. **Premise:** This next example looks at a variety of situations where you might want to enhance certain people's Narrative about their Child, or their Parents, dying young:
   1. Situations like:
      a. Including the death of children that pre-decease the Parent in the Parent's Narrative timeline
      b. Or, including a Parent's unusually early death in a Child and/or their Spouse's Narrative Timeline
   2. To start, let's look at the built-in Death Fact Type, which as we see, comes with 2 Roles:
      a. Principal Role:
         i. [person] died< [Desc]>< [Date]>< [person:Age]>< [PlaceDetails]>< [Place]>.
         ii. Looking at the structure of the Template:
            1. When able to calculate it, RootsMagic includes the Person's age
            2. The Description Data Field is where the Cause of Death is expected to be inserted into the Death Fact sentence
            3. In addition to the cause of death, you can add additional text in the Description Data Field. You just have to make sure that what you enter blends into the resulting sentence by watching the sentence at the bottom right of the Edit Person window change as you type in the Description field
            4. So, there's no real need to modify the built-in Template in order to enhance the resulting sentence due to a Person's own early death
      b. Witness Role:
         i. [ThisPerson] witnessed the death of [person]< [Date]>< [PlaceDetails]>< [Place]>.
         ii. If you were to use this Role, I'm not sure it requires consideration of mentioning an early death.
   3. Considering the Premise for this example, it would appear that we're going to need to add 2 new Supporting Roles to the Death Fact Type:
      a. **Supporting Role #1:** Early Child Death to be shared with each Parent
      b. **Supporting Role #2:** Early Parent Death to be shared with their surviving Children and Spouse
      c. As indicated in the SIG Handout, I recommend working through new Templates one at a time using the 9-step process.
         i. If there's any commonality between them you can start the 2nd Template knowing that the structure of the 1st one works the way you want it to
         ii. I believe this is a less confusing approach than trying to address any differences in the Templates concurrently.
         iii. I leave it to each of you to decide how you prefer to tackle developing new Templates
      d. This example focuses on Supporting Role #1, addressing the early death of a child by enhancing the Sentence Template for each Parent's Narrative report timeline
   4. So, let's start the process…
   5. **Step 1:** Draft a sample of how you want the resulting sentence to read:
      a. Here are a bunch of possible sentences that users have suggested:
         i. George Robert Smith lost his son. John Smith died on 6 November 2024.
         ii. George Robert Smith lost his son John Smith on 6 November 2024 at home in Portland, Multnomah, Oregon.
         iii. George Robert Smith lost his son John Smith on 6 November 2024. He died of cancer at home in Portland, Multnomah, Oregon when he was 3 years old.
         iv. George's son John pre-deceased him in 2024. He was 3 years old when he died.

   b. This variety of suggestions highlights the fact that we're all different in terms of what we want to have as an output from our database files when we document our ancestor's life stories. The choices we have from these ideas are:
      i. Full Name vs just Given Name
      ii. One Sentence vs multiple sentences
      iii. Include cause of death, or not
      iv. Include age, or not
      v. Include date of death, or year of death, or (not one of the examples) leave date out completely and rely on age and/or placement in the Narrative Timeline
         1. **Note:** The Sort Date field will control the placement of the sentence in the timeline regardless of whether or not the Date field is used in the sentence template
   c. For our example, let's mash some bits of these suggestions together and see what the Template would look like:
      i. Georges son John pre-deceased him in 2024. He died of cancer at home in Portland, Multnomah, Oregon. John was 3 years old.
6. **Step 2:** Replace the pieces of the sentence where the specific information will come from one of the Fact Data Fields:
   a. [ThisPerson:Given:Poss] son [Person:Given] pre-deceased him in [Date:Year]. [Person:HeShe] died [Desc] at [PlaceDetails] in [Place]. [Person:Given] was [Person:Age] years old.
7. **Step 3:** Confirm the needed Optional Data Fields are active for this Fact Type:
   a. The built-in Death Fact Type already uses all the Optional Data Fields, so no changes are required
8. **Step 4:** Determine if there are additional people and/or Supporting Role names that need to be included in the sentence:
   a. We've already identified the **[Early Child Death]** & **[Early Parent Death]** Supporting Roles are needed, but haven't identified the need for any additional ones
   b. This is where we add the **[Early Child Death]** & **[Early Parent Death]** Supporting Roles to the Death Fact Type
9. **Step 5:** Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result:
   a. **Reminder:** The default Prefix for **[Date]** is "in/on"; the default for **[PlaceDetails]** is "at" and the default for **[Place]** is "in" so the Template should be:
   b. [ThisPerson:Given:Poss] son [Person:Given] pre-deceased him [Date:Year]. [Person:HeShe] died [Desc] [PlaceDetails] [Place]. [Person:Given] was [Person:Age] years old.
10. **Step 6:** Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank:
    a. In addition to placing Conditional Brackets around each sentence segment that had a Data Field, because this has multiple sentences, we also need to consider Conditional Brackets for entire sentences
    b. As we discovered in earlier examples, we're going to need to use some Switches to make them work correctly. We'll wait for the next step in the process to address that aspect…
    c. [ThisPerson:Given:Poss] son [Person:Given] pre-deceased him< [Date:Year]>.< [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.>< [Person:Given] was [Person:Age] years old.>
11. **Step 7:** Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the person is Living or not:
    a. Looking at what we have so far, we're going to need Switches for:

i. **Sentence #1:**
   1. **Son/Daughter:**
      a. [ThisPerson:Given:Poss] <%Person%son|daughter>< [Person:Given] pre-deceased him< [Date:Year]>.< [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.>< [Person:Given] was [Person:Age] years old.>
   2. **Him/Her:**
      a. [ThisPerson:Given:Poss] <%Person%son|daughter>< [Person:Given] pre-deceased [ThisPerson:HimHer]< [Date:Year]>.< [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.>< [Person:Given] was [Person:Age] years old.>
      b. **Note:** We could have used **<%ThisPerson%him|her>** and gotten the same results

ii. **Sentence #2:**
   1. Test for the presence of at least one of these 3 variables **[Desc]**, **[PlaceDetails]** or **[Place]**. If none are present, sentence #2 needs to be suppressed completely:
      a. [ThisPerson:Given:Poss] <%Person%son|daughter>< [Person:Given] pre-deceased [ThisPerson:HimHer]< [Date:Year]>.<?[Place]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe] died< [Desc].>< [Person:Given] was [Person:Age] years old.>

iii. **Sentence #3:**
   1. Test for the presence of an Age (**[Person:Age]**). If not present, sentence #3 needs to be suppressed completely:
      a. ThisPerson:Given:Poss] <%Person%son|daughter>< [Person:Given] pre-deceased [ThisPerson:HimHer]< [Date:Year]>.<?[Place]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe] died< [Desc].><?[Person:Age]| [Person:Given] was [Person:Age] years old.|>

12. **Step 8:** Decide whether any text formatting is desired (Bold, Italics, All Caps, etc):
    a. None required for this example
13. **Step 9:** Trial & error testing:
    a. Now we paste what we've assembled as the Fact Sentence Template and see if the resulting sentence matches what we wrote out in Step 1
    b. We see the following issues:
       i. The father's given name includes his middle name, we only wanted to use his first name
       ii. The year appears inside brackets and there's an extra space. These are indications of a template formatting issue
       iii. Sentences #2 & 3 also appear to also have a formatting issue.
    c. When you have a whole bunch of things that don't look right, always start at the beginning of the Sentence Template and work left to right through it to resolve your issues.
       i. Why, because RootsMagic processes Sentence Templates left to right and when the formatting of Field Names, Switches and/or Conditional Brackets are not correct, RootsMagic displays what is written, as it's written, starting from where it can't properly interpret the template
    d. So, the first thing to address is that specifying the father's "**:Given**" name includes more than just the Person's first name, which is what our original sentence indicated we wanted to use.
       i. Looking at the Online Help for the Sentence Template Language, we see several Field Options.

ii. We need to decide whether we want to replace the "**:Given**" Name Option with either the "**:First**" or "**:Casual**" Name Option
   1. Using "**:Given**" results in everything entered in the Given Name Field being used
   2. Using "**:First**" results in the first word entered in the Given Name Field being used
   3. Using "**:Casual**" results in the Person's Nickname being used, if there is one. Otherwise, the first word entered in the Given Name Field is used , just like "**:First**"
   4. ThisPerson:First:Poss] <%Person%son|daughter>< [Person:Given] pre-deceased [ThisPerson:HimHer]< [Date:Year]>.<?[Place]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe] died< [Desc].><?[Person:Age]| [Person:Given] was [Person:Age] years old.|>

iii. At this point, perhaps we should also ask ourselves what our original intent was for the son. Was it Given Name, First Name or Casual Name.
   1. Based on our overall plan for enhancing Narrative reports, we might come to different answers depending on whether or not this is the only Fact in the Parent's Narrative Timeline that will be mentioning the Child's name
      a. If this is the only Fact, then I think I'd be inclined to use their Given Name
      b. If I was also going to include the Child's birth in the Parent's Timeline, where the full Given Name would be mentioned, I might be inclined to consider using their First Name in this Template
   2. For this example, we'll leave it using their Given Name

e. Next, we look at the segment that includes the year of death.

i. As we examine the result, we see that the expected date year is present, the issue is that what were supposed to be Conditional Brackets are shown as Less Than & Greater Than symbols in the resulting sentence.

ii. So, let's start by confirming we have the proper number of sets of brackets surrounding the sentence segments in the first sentence
   1. We see the 1st set surrounding the son/daughter Switch
   2. Then we see 2 starting (Less Than) Conditional Brackets implying that one conditional segment is embedded inside another conditional segment.
   3. But we only see one closing (Greater Than) Conditional Bracket and then we get to the end of the 1st sentence.
   4. It appears we are missing a closing Conditional Bracket just prior to the period of the 1st sentence
   5. Or, do we have one too many starting (Less Than) Conditional Brackets?
   6. We insert a closing Conditional Bracket and see that it solves the formatting issue in the 1st sentence
   7. Then we delete the bracket we just added, along with the starting bracket after the son/daughter switch and see the same result
   8. Since the Date is already in conditional brackets and the only other variables in this segment would be the Principal and Supporting Person, there's no need to have this starting Conditional Bracket, so the proper fix is to leave this bracket deleted
   9. [ThisPerson:First:Poss] <%Person%son|daughter> [Person:Given] pre-deceased [ThisPerson:HimHer]< [Date:Year]>.<?[Place]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe] died< [Desc].><?[Person:Age]| [Person:Given] was [Person:Age] years old.|>

f. We now see the following issues:

i. There appears to be 2 spaces between "him" and "1930" and the expected default prefix word "in" is not present
ii. There are still formatting issues with Sentences #2 & #3
iii. In sentence #3, RootsMagic has inserted "at the age of" as a default Prefix. We don't want these words inserted

g. Again, we go left to right and look at why we have 2 spaces and are missing the word "in":
   i. We look at the Template and see that we are adding a space (the blank space is in front of the Date Field).
      1. It appears that because we are using the Field Option "**:Year**" the default Prefix that RootsMagic uses becomes a blank space
      2. So, deleting the blank space in our Template will solve the space issue, but what we really need to do is add the word "**in**" which we thought would appear as the default Prefix. It appears that in this situation, it must be hard coded into the Template
      3. Now we see that because we hard coded the word "in" in front of the Date, RootsMagic no longer is adding the default Prefix of a blank space. So, we need to add the blank space back
      4. [ThisPerson:First:Poss] <%Person%son|daughter> [Person:Given] pre-deceased [ThisPerson:HimHer]< in [Date:Year]>.<?[Place]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe] died< [Desc].><?[Person:Age]| [Person:Given] was [Person:Age] years old.|>

h. Now we need to figure out what's going on with sentence #2:
   i. I don't know about you, but staring at the entire sentence template makes it difficult to focus on the middle sentence.
      1. Since the first sentence works like we want, I'm going to temporarily delete it so we can focus on getting sentence #2 to work correctly
      2. While I'm at it, I'm going to also delete sentence #3 since it will need to stand on its own too
   ii. Since we're seeing a lot of template language that should be replaced with data, let's start by checking for the proper number of Conditional Brackets
      1. I go left to right counting starting brackets and subtracting one for each closing bracket
      2. If there are an equal number, I should end up with zero
      3. Instead of zero, I end up with 3
      4. So, it would appear that 3 closing brackets are missing in the template
   iii. Now we'll go left to right, looking at each value switch section to confirm where the missing brackets belong:
      1. The 1st Value Switch tests for the existence of data in the **[Place]** Data Field. The brackets for this Switch are around the entire 2nd sentence
      2. The "True" section has pairs of brackets around each Data Field Name
      3. The "False" section starts with our Value Switch test for the existence of data in the **[PlaceDetails]** Data Field
         a. We see that this section has the starting bracket, but there should be a 2nd closing bracket inside the closing bracket for the **[Place]** Value Switch
         b. So, let's add it. 2 more brackets to add…
      4. Now we look at the "True" section of the **[PlaceDetails]** Value Switch and see it has pairs of brackets around each Data Field Name
      5. Looking at the "False" section, it starts with our Value Switch test for the existence of data in the **[Desc]** Data Field

a. We see that this section has the starting bracket, but there should be a 3rd closing bracket inside the closing bracket for the **[PlaceDetails]** Value Switch
b. So, let's add it. 1 more bracket to add…

6. Now we look at the "True" section of the **[Desc]** Value Switch
   a. We see there is only a starting bracket around the [Desc] Data Field
   b. Our initial thought would be to add the missing closing Conditional Bracket
   c. But, if you think about it, the Value Switch for this section is only going to be "True" if there is data in the **[Desc]** Data Field
   d. So, instead of adding the missing closing bracket, we could delete the starting bracket instead
      i. **Note:** In fact, the Conditional Brackets are "Optional" for the **[Place]** and **[PlaceDetails]** Data Fields, but only in the "True" section for the corresponding Value Switch that is testing for the existence of that Data Field
   e. Although it adds more symbols to the sentence template, I'm electing to add the missing closing bracket. Why, because I like to keep things simple where I can and it's easier to remember that every Data Field variable should have Conditional Brackets around it, just in case it's blank

iv. So, with the first 2 sentences working, our full template now looks like this:
v. [ThisPerson:First:Poss] <%Person%son|daughter> [Person:Given] pre-deceased [ThisPerson:HimHer]< in [Date:Year]>.<?[Place]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe] died< [Desc]>.>>><?[Person:Age]| [Person:Given] was [Person:Age] years old.|>

i. All the symbols and brackets have disappeared, but we see:
   i. The "**H**" in he, starting the 2nd sentence needs to be capitalized
   ii. In the 3rd sentence, RootsMagic has inserted "**at the age of**" in front of his age
j. Looking at the Online Help, it appears that we can use either "**:Caps**" or "**:Proper**" to resolve the "**H**"
   i. Either will work in this application because we know it will only be applied to a single word
   ii. [ThisPerson:First:Poss] <%Person%son|daughter> [Person:Given] pre-deceased [ThisPerson:HimHer]< in [Date:Year]>.<?[Place]| [Person:HeShe:Caps] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe:Caps] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe:Caps] died< [Desc]>.>>><?[Person:Age]| [Person:Given] was [Person:Age] years old.|>
k. Finally, we need to suppress the unexpected default Prefix that RootsMagic inserted, "**at the age of**"
   i. If you check the Online Help, you'll see that we didn't focus on what the default Prefix was for "**:Age**"
   ii. We need to use the "**:Plain**" Field Option
   iii. [ThisPerson:First:Poss] <%Person%son|daughter> [Person:Given] pre-deceased [ThisPerson:HimHer]< in [Date:Year]>.<?[Place]| [Person:HeShe:Caps] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe:Caps] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe:Caps] died< [Desc]>.>>><?[Person:Age]| [Person:Given] was [Person:Age:Plain] years old.|>
l. We now have a Sentence Template that creates the original sentence we defined in Step 1
m. It's now time to test it to confirm it responds to the absence of the various Data Fields the way we think it should for the following Scenarios:
   i. **Scenario #1:** Sex of Supporting Person – Male, Female, Unknown
      1. Should be OK as written since, per the Online Help, the "**:HimHer**" Person Option addresses Sex set to Unknown

2. But we discover that this results in "**him/her**" instead of the expected "**they**"
3. So, we'd need to decide whether to leave the template as is, or change this sentence segment to a Gender Switch with 3 different results
4. We've already covered how to do use the Gender Switch in example #4 so I'm going to move on

ii. **Scenario #2:** Sex of Principal Person - Male, Female, Unknown
1. We discover that when the Sex is Unknown, this results in referring to the person as "**son**" and "**He/She**," not "**They"** as implied in the Online Help
2. Similar to Example #4, the cause of "**son**" appearing is because when we added the Gender Switch in Step 7, we didn't consider a 3rd Option for when "Unknown" Sex was encountered.
3. For the "**He/She**" result, we'd need to decide whether to leave it as is, or change this sentence segment to a Gender Switch with 3 different results
   a. In Step 7, I mentioned a Gender Switch could also be used. This can be resolved by changing to a Gender Switch and adding "child" as a 3rd option for "Unknown" sex, similar to our use of "Parent" in Example #4
   b. I'm going to skip working through this as well since there's nothing new to explore and example #4 contains the relevant information

iii. **Scenario #3:** Death Date – No date at all and date with no year specified
1. No death date
   a. Both first and 3rd sentences read correctly
2. Day and month, but no year
   a. Both first and 3rd sentences read correctly

iv. **Scenario #4:** Death Description – no description
1. Sentence #2 reads correctly

v. **Scenario #5:** Death Place Details – no Place Details
1. Sentence #2 reads correctly

vi. **Scenario #6:** Death Place – no Place
1. Sentence #2 reads correctly

vii. **Scenario #7:** Birth Date of Principal Person – no date
1. Sentence #3 reads correctly

n. So, we've tested all the applicable scenarios and our final version appears to work as we wanted:
i. [ThisPerson:First:Poss] <%Person%son|daughter> [Person:Given] pre-deceased [ThisPerson:HimHer]< in [Date:Year]>.<?[Place]| [Person:HeShe:Caps] died< [Desc]>< [PlaceDetails]>< [Place]>.|<?[PlaceDetails]| [Person:HeShe:Caps] died< [Desc]>< [PlaceDetails]>.|<?[Desc]| [Person:HeShe:Caps] died< [Desc]>.>>><?[Person:Age]| [Person:Given] was [Person:Age:Plain] years old.|>

14. Now that we have our desired Sentence Template for the first Supporting Role we identified:
   a. The next step is to cut/paste the Template into the Fact Type's Supporting Role to make it the default and automatically reset the Template for the Fact we used for testing
      i. Or, copy/paste it to the Fact Type Supporting Role and then reset the Sentence Template for the Person's Fact that we were using for trial & error testing
15. Finally, we would repeat the process we just went through and develop the Sentence Template for the 2nd Supporting Role to share with Children whose had a parent die young
   a. After drafting the desired sentence in Step 1, you can probably save time by modifying a copy of the template we just finished creating
   b. Rather than walk through the series of steps to create another Template very similar to the one we just created, I'm going to leave that up to those interested in using this example

EXAMPLE #7 - Census/Residence: Reporting entire household

G. **The Setup:** There are a variety of ways people and online sites prefer to handle Census data:
   1. These approaches include:
      a. Some people consider a Census record:
         i. As both a Fact, or Event, that people participated in; and a source for information
            1. For example, FamilySearch attaches their Census records to people as a Census Fact
         ii. As a source for deriving information, and not a specific Person's Fact, or Event
            1. For example, Ancestry attaches their Census records to people as a Residence Fact
            2. **Note:** In some countries, the instructions for their Census require people to report where they slept on the Census date, which may not be their actual residence
         iii. You've probably noticed that you haven't seen a Census Fact in my SIG Demo database file
            1. When I started using RootsMagic, I merged the research several older relatives had done in the past. I imported most of them into RootMagic files using TreeShare from their Ancestry Trees, and as I mentioned, Ancestry assigns their Census records to Residence Facts
            2. It's only been in the last couple of years, after reading many online opinions from others, that I have started arguing with myself as to whether I should stick with my current approach, or perhaps have been swayed to switch my approach.
            3. At this moment in time, I don't have a feel for whether I am winning, or losing, this argument
         iv. Like most things in genealogy, there is no written rule, or correct answer, to this question that I am aware of
      b. In RootsMagic, some people prefer to use:
         i. The Census (family), or Residence (family), Family Facts and then Share the Fact with people other than the Person's Spouse
            1. In most cases that get discussed in Facebook, or in the RootsMagic Community, it seems like the user initially thought that because it had "family" in the Fact Type name that they could apply it to everyone in a family, not just the parental Couple
            2. Most knowledgeable RootsMagic users, plus RootsMagic Technical Support, recommend not using these two Family Fact Types
            3. According to RootsMagic Technical Support, these two built-in Family Fact Types are only included in order to properly import data from some other genealogy software programs
         ii. Most Users use either the Census or the Residence Individual Fact
      c. Regardless of whether you use a Census Record to document a Census and/or Residence Fact:
         i. Most people like to associate a Census record to every member recorded on it
            1. Some attach a copy of the same Fact to each Person enumerated
               a. **Note:** This has become much easier to do with the introduction of the Copy Fact function in v10
            2. Some attach it to the Head of Household and Share the Fact with each enumerated Person
               a. Some share the Fact using a single Supporting Role
               b. Some use a different Role based on the reported relationship recorded on the Census record
         ii. Some people like to associate it with just the Head of household and include everyone in the household in the Fact Note, which can be included in the Narrative report for the Head of Household, following the Narrative sentence

   iii. As I've mentioned previously, I think some of these approaches were the result of the lack of a copy Fact function prior to v10 and general desire to reduce data entry effort more that a desire to enhance a person's Narrative
2. **Premise:** For this example, I am going to share an example based on a request for help someone asked for in the online RootsMagic Community, administered by RootsMagic:
   a. RootsMagic Community discussion: https://community.rootsmagic.com/t/sentence-template-based-on-roles-only-display-if-has-role
   b. The person was trying to craft a Sentence Template that would generate a Narrative sentence that would appear in the Head of Household's Narrative report as a list of all the people enumerated in their household for each Census. They didn't know how to suppress part of the Template if there was no one that a Role had been shared with
3. Let's follow the play-by-play as people weighed in with responses:
   a. Here's the initial post by kevync1985:
      i. He provides the current version of his Template
      ii. Along with a sample showing how it works with a Wife, multiple Daughters and Sons
      iii. And a sample of his problem. He doesn't want the line with the Daughter(s) heading to appear when there are no Daughters in the Census household
   b. Thejerrybryan (a longtime, very experienced, user) responded:
      i. The answer to the original question: Use Conditional Brackets
      ii. But then he goes on to address the multi-line aspect of what he's trying to do
         1. I don't think I touched on this, but a Sentence Template doesn't have to be a traditional sentence. It can be a multi-line list by inserted line feeds/carriage returns in the appropriate places in the template
         2. Note his comment about playing with the location of Conditional Brackets to get the line feeds in the proper Conditional Bracket section and then shows an example of where the start of the Conditional Bracket segment probably needs to start
      iii. Then he provides additional feedback about how he could use the Plurals Switch
      iv. By the way, Jerry is the primary user that prefers the "Point Form" Narrative style for his Sentence Templates that I used in Example #4
   c. Then nkess jumps in asking his own questions about how the original poster did it
      i. Notice that he started crafting his version using Census (family)
      ii. He asks: How would the kid's names get brought in?
   d. Then TomH responded to nkess's question
      i. TomH is another longtime user. In fact, he's the person that runs the "Sqlite Tools For RootsMagic" website that I have provided links to for a few topics. Tom is very knowledgeable on the internal structure and working of the database and all its Tables
      ii. Assign the appropriate Role and share the Fact with them
   e. Then nkess responds that he did that
      i. He starts thinking maybe it's because he chose a Family Fact
   f. Jerry responds to nkess
      i. Being a Family Fact is not the issue
      ii. He then repeats one of the reasons I've shared with you previously as to why he probably should use the Individual Census Fact rather than the Family Fact version
   g. Then Jerry indicates more information is needed to help nkess figure out why he can't get it to work
   h. Then TomH weighs in again
      i. He provides additional reasons why using a Census Family Fact is not really appropriate for this specific example

   ii. i.e. The same Narrative sentence will appear for both people the Family Fact is assigned to and the Template nkess has drafted is just for the Head of Household
i. nkess responds to Jerry & Tom
   i. It appears to me that nkess is in the early days of learning how the Sentence Template Language works
j. Kevync1985 returns to his posting and shares the big listing of Supporting Roles he has created
   i. Basically, he has created a Supporting Role for every possible relationship that you might find on a Census record
   ii. **Note:** I'd like to remind everyone that to get the order he has listed here, he had to create them in that order.
   iii. I'm sure he spent a fair amount of time coming up with his list of Roles and deciding the order he wanted them to appear before he created the 1st Role in RootsMagic
k. Kevny1985 then responded to Jerry's recommendation on using the Plurals Switch
   i. We learn that he has not yet actually added all the Supporting Roles he's defined to his Template yet
   ii. He shares an updated example of his Template generated Narrative sentence and the corresponding Sentence Template
   iii. Notice that he has incorporated:
      1. A household summary with a count of the number of daughters and sons using the "**:Count**" Field Option
      2. He's added Conditional Brackets around some sentence segments, but not the Household summary.
      3. But he acknowledges that he needs to
l. Then slickopr1, a new person, weighs in with his version, based on what he thinks would be a good way to present it:
   i. Notice his use of:
      1. Bold formatting – I'm not sure if that was intended for the Template or just to put emphasis in the different Roles since he didn't include the necessary Bold formatting codes
      2. **[Date:Year]** & later **[Date:Plain]** – this allows him to display the year in 1 place, while the full date represents the data of recording/enumeration
      3. **[Place:Short]** – As I mentioned in example #4, the use of "**:Short**" tells RootsMagic to use the Place Abbreviation, which we'll learn when we get to Working With Places means RootsMagic will use whatever you enter in the Abbreviation Data Field for each Place in the Place List. If nothing has been entered, the full Place name will be used
      4. **[Person:HeShe:Caps]** – Ensures that the Principal Person, the Head of Household can be either male or female and the new sentence will start with a capitalized He or She
      5. **[Person:Age:Plain]** – results in just the number of years being inserted with no default Prefix wording
      6. **[Husband:First:Surname:Proper]** – This results in First & Last Names only, no middle names, nicknames, Prefix or Suffixes
      7. In reviewing the included Conditional Brackets, it appears there are quite a few closing brackets that are missing
4. This activity all took place in December 2024. There's been no further interaction on this thread. We have to assume that kevync1985 got enough feedback on ideas to get to a final template that worked the way he wanted it to.

EXAMPLE #8 - Property Transfer: Seller & Buyer

H. **Setup:** Last May Don, one of our SIG members, contacted me looking for advice:
   a. He had a couple of properties in Sweden that was passed between various family members, across quite a few generations
      i. He was seeking advice on how to connect the property transfers through the generations so that the information could be followed
      ii. I asked for clarification on what the overall goal was. i.e. was it just to record the data in RM, or to get it out of RM in Narrative reports, etc. He confirmed was interested in Narrative output that people could follow
      iii. I offered several options on how he could proceed based on a series of questions and whether his answer was yes, or no
      iv. The key takeaway for Don was my advice to: "determine what you want to get out, and then design the input to create the output"
   b. The result of my advice and focus on what he wanted to get out of RootsMagic resulted in his creation of a new Individual Fact Type to document the transfer of each property between the Buyer & the Seller.
   c. Part of his approach was to ensure the name of the property was entered as part of the Fact Description so that, in addition to generating a Narrative report:
      i. He could create a Group containing all the people that owned a specific property by filtering on the Fact Description field containing the property name
      ii. He could then use this Group to produce an Individual List report that included everyone that at some point in time was an owner of the specific property
      iii. He could also create a Custom Report containing the People and Property Transfer Facts for the Group of people, sorted by date, or Name
   d. In November, he contacted me again:
      i. He was attempting to craft a similar Fact Type and Template where the Seller and Buyer were both Couples:
      ii. He had created another new Fact Type; this time a Family Fact Type because the transaction involved a Couple that were the sellers
      iii. Individual Fact: [person] sold< [desc]>< to [buyer]>< [date] ><[placedetails] ><[place]>.
         1. For this Individual Fact Type, he created a **[Buyer]** Role
      iv. Family Fact: [couple] sold [desc] to [buyer] [date] [placedetails] [place].
         1. For this Family Fact, he wanted to have a **[Buyer]** Role for the Buyer Couple
      v. He was struggling to figure out how to get the Buyer Couple's names into the Family Fact assigned to the Seller Couple
         1. The solution was fairly simple because you can't share a Fact with a Couple
         2. My advice was to share the Family Fact with each Individual Buyer, not the Couple
            a. The **[Buyer]** Role would be basically the same as what he created for the Individual Fact Type
         3. I also recommended he add Conditional Brackets to his template in case not all the Data Fields used in the Template always had data entered in them
2. **Premise:** So, let's take a more generic view. Let's create a Custom Fact Type and define the necessary Supporting Roles that would allow you to document the transfer of property that involves one or more Sellers; which may, or may not be husband & wife; and one or more Buyers, which also may, or may not be husband & wife.
3. Before we jump in, let's look at the built-in Property Fact Type that comes in RootsMagic:

a. **Principal Role:** [person] owned [Desc]< [Date]>< [PlaceDetails]>< [Place]>.
   i. As written, this results in a sentence stating the Principal Person owned whatever is inserted in the Description Data Field. This could be real estate, a car, a treasured heirloom, or any other property worthy of recording.
b. **Witness Role:** [ThisPerson] witnessed the property of [person] as [Desc:A]< [Date]>< [PlaceDetails]>< [Place]>.
   i. I'm not sure I grasp the intent of this Template in its default form. I guess it depends on what the property is that the Person assigned this Supporting Role is witnessing
   ii. **Note:** The use of **[Desc:A]** tells RootsMagic to place either "**a**" or "**an**" in front of the text entered in the Description Data Field depending on whether the first letter of the first word in the Description is a consonant, or a vowel
c. It would appear that this built-in Property Fact Type was not intended to capture transactions of property.
   i. Rather than changing its original intent, my vote is to leave it as is and use it for things like documenting the period of time property was owned by a Person regardless of whether it was real estate, cars or some other memorable form of property

4. Considering the Premise for this example, it would appear that we should be creating a new Custom Fact Type, although once we work it all out, maybe we should revisit this decision
   a. Let's call our new Fact Type, "**Property Transfer**"
   b. Since we want to be able to use this in situations where multiple people are involved, and they won't always be a Couple, we should focus on creating it as an Individual Fact Type
   c. As Don's approach indicated, in addition to the Principal Role, 2 Supporting Roles are required:
      i. **[Seller]:** Everyone that is currently a partial owner of the property being transferred/sold will be assigned this Role
      ii. **[Buyer]:** Everyone that is going to be a partial owner of the property after the transfer/sale will be assigned this Role
      iii. **[Principal]:** So, in a situation like this, who gets assigned the Principal Role?
         1. Referring back to Don's initial approach, he was assigning the Fact to the Seller
         2. So, in our example, should we assign it to:
            a. The 1st Person listed in our list of Sellers?
            b. Maybe it should be the closest family relative involved with the transition?
            c. Instead of assigning it to a Seller, perhaps it should always be a Buyer?
         3. Another thing to consider is the limitation of Shared Facts:
            a. You're not guaranteed that the information about other People assigned a Supporting Role will survive a data transfer outside of RootsMagic
            b. So, the path we decide to take will result in different approaches to tackling this example
   d. If ensuring that information is not lost when transferring data outside of RootsMagic IS A PRIORITY:
      i. That would mean we need an approach that ensures everyone involved is assigned their own Fact as a Principal
      ii. I've come up with 2 Options that will meet this requirement. Both Options require 2 Custom Fact Types. One to capture the transaction information for each person involved; and the other to create the desired Narrative sentences:
         1. **Option #1:**
            a. One Fact Type to be assigned to each Seller
            b. A second Fact Type to be assigned to each Buyer

c. Only one of these Facts, assigned to one of the people involved, would be shared with all others, assigning the 2 Supporting Roles (**[Seller]** & **[Buyer]**) to all involved, in order to create the desired Narrative sentences
d. The Principal Sentence Template for both Fact Types would be blank
e. **Remember:** If all "**Include When**" checkboxes for the Fact Type are left checked, a blank Principal Sentence Template will ensure nothing is included in a Narrative report, even when the checkbox is checked; but the data entered in the Fact's data fields will be included in both a Family Group Sheet and an Individual Summary report.

2. **Option #2:**
   a. One Fact Type that contains the information about everyone involved in the transaction using the Description and/or Notes Data Fields.
      i. This Fact would be copied to all people involved in the transaction
      ii. The Principal Sentence Template would be blank
      iii. **Remember:** Again, if all "**Include When**" checkboxes for the Fact Type are left checked, a blank Principal Sentence Template will ensure nothing is included in a Narrative report, even when the checkbox is checked; but the data entered in the Fact's data fields will be included in both a Family Group Sheet and an Individual Summary report.
   b. The other Fact Type would be assigned to one of the people involved. It would be shared with all others, including the Principal, assigning the proper Supporting Role (**[Seller]** & **[Buyer]**) to all involved in order to create the desired Narrative sentences
   c. The Principal Sentence Template for this Fact Type would also be blank
      i. The same reminder about the Fact Type "**Include When**" checkboxes apply
3. I think Option #2 may be a bit more straightforward

e. If ensuring that information is not lost when transferring data outside of RootsMagic is NOT A PRIORITY:
   i. Then we just need one Fact Type to be used to create the Narrative sentences
   ii. And we need to only assign the Fact to one Person as the Principal
   iii. The Principal Sentence Template for this Fact Types will be blank
   iv. The Principal and all others involved in the transaction will need to be assigned the proper Supporting Role as either a **[Seller]**, or a **[Buyer]**, in order to create the desired Narrative sentences
f. So, after talking through all those options, for today's example we're going to:
   i. Ignore the possible need for a 2nd Fact Type in order to ensure that everyone involved still has information about the property transfer should the data be transferred outside of RootsMagic
      1. The only unique aspect to this 2nd Fact Type is that the Principal Sentence Template needs to be blank to prevent its information from being included in Narrative Sentences
      2. Or, you could Edit the Fact Type and uncheck the appropriate "**Include When:**" checkboxes
   ii. Whomever ends up being assigned as the Principal for this example won't materially affect the Supporting Role Sentence Templates we are about to craft
      1. Although not significant in the development of the Templates, I think it would be important that the user of this Fact Type have their own "rule" for who they assign as the Principal for database management consistency reasons

5. So, let's start the process…
6. **Step 1:** Draft a sample of how you want the resulting sentence to read:
   a. **[Principal]:** Our initial starting concept is that a Principal Sentence Template is not needed
   b. We have 2 Options to consider for structuring our desired Supporting Role sentences:

i. **Option #1:** The same sentence for both **[Seller]** & **[Buyer]**:
   1. **[Seller]** & **[Buyer]** Supporting Roles:
      a. Seller1, Seller2 and Seller 3 sold the property known as Lot #57 to Buyer1, Buyer2 and Buyer3 on 1 January 1920 at 721 Saint George Avenue in Woodbridge, Middlesex, New Jersey, United States.

ii. **Option #2:** Different sentences for each Supporting Role:
   1. **[Seller]** Supporting Role:
      a. Seller1, Seller2 and Seller 3 sold the property known as Lot #57 to Buyer1, Buyer2 and Buyer3 on 1 January 1920 at 721 Saint George Avenue in Woodbridge, Middlesex, New Jersey, United States.
   2. **[Buyer]** Supporting Role:
      a. Buyer1, Buyer2 and Buyer3 bought the property known as Lot #57 from Seller1, Seller2 and Seller 3 on 1 January 1920 at 721 Saint George Avenue in Woodbridge, Middlesex, New Jersey, United States.

c. For our example, I'm going to proceed using Option #1, a single Template that can be used for both Roles, will suffice.
   i. Implementing Option #2 is just a matter of rearranging parts of Option #1 around to restructure the resulting Narrative sentence

7. **Step 2:** Replace the pieces of the sentence where the specific information will come from one of the Fact Data Fields:
   a. Seller1, Seller2 and Seller 3 sold [Desc] to Buyer1, Buyer2 and Buyer3 on [Date] at [PlaceDetails] in [Place].
   b. **Note:** We're not using **[Person]** to substitute the Principal's name for any of the desired people's names
8. **Step 3:** Confirm the needed Optional Data Fields are active for this Fact Type:
   a. This is going to be a new Fact Type, so let's create it and confirm that all the Optional Data Fields are active since we need the Date, Description , Place Details and Place information
   b. **Reminder:** We decided to call this new Fact Type: "**Property Transfer**"
   c. **Reminder:** We decided we don't want a Sentence Template for the Principal Role, so after creating the Fact Type, we need to go back and remove what RootsMagic created automatically for the sentence template
9. **Step 4:** Determine if there are additional people and/or Supporting Role names that need to be included in the sentence:
   a. We've already determined there won't be a Principal Sentence Template and we are going through this process to create the Supporting Role Sentence Template
   b. We identified the **[Seller]** & **[Buyer]** Supporting Roles and haven't identified the need for any additional ones
      i. So, let's add these 2 Supporting Roles to our Property Transfer Fact Type
      ii. For now, we'll leave the Sentence Templates blank
      iii. We need to add the Supporting Roles to our draft template
   c. [Seller] sold [Desc] to [Buyer] on [Date] at [PlaceDetails] in [Place].
10. **Step 5:** Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result:
   a. **Reminder:** The default Prefix for **[Date]** is "in/on"; the default for **[PlaceDetails]** is "at" and the default for **[Place]** is "in"
   b. [Seller] sold [Desc] to [Buyer] [Date] [PlaceDetails] [Place].

11. **Step 6:** Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank:
    a. [Seller] sold< [Desc]> to [Buyer]< [Date]>< [PlaceDetails]>< [Place]>.
12. **Step 7:** Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the person is Living or not:
    i. No Switches appear to be needed
13. **Step 8:** Decide whether any text formatting is desired (Bold, Italics, All Caps, etc):
    a. None required for this example
14. **Step 9:** Trial & error testing:
    a. Since this is a new Custom Fact Type and it needs to involve at least 6 people to test it, we need to
        i. Identify a Principal, at least 3 Sellers and at least 3 Buyers
            1. The Person assigned with the Principal Fact should also have a Shared Role as either a Seller or a Buyer, which is easily identifiable due to the outline of a person and the Supporting Role name placed in front of the Fact name
        ii. There are no sex/gender related Switches in our template, but you might want to mix some male/females in
    b. Now we paste what we've assembled as the Fact Sentence Template into the Sentence Template for a Seller and see if the resulting sentence matches what we wrote out in Step 1
    c. We see the following issues:
        i. The name of the Person with the assigned Shared Role we are using isn't included
            1. We see the Online Help description of this variable is a little misleading
                a. **[Seller]** & **[Buyer]** list all the other people assigned these Shared Roles
                b. When used in a Principal's template, **[Seller]** & **[Buyer]** will list everyone assigned either of these Shared Roles
            2. We need to add **[ThisPerson]** to include the name of the Person with the assigned Shared Fact.
            3. [ThisPerson], [Seller] sold< [Desc]> to [Buyer]< [Date]>< [PlaceDetails]>< [Place]>.
        ii. The sentence now reads like our original sentence
    d. Now we need to test the scenarios for dealing with missing data in Data Fields
        i. We quickly see that it handles each scenario fairly well.
        ii. When the Date is missing, the sentence is a bit awkward. Perhaps this could be improved with some additional wordsmithing…
    e. Going back to Don's original scenario of a married couple being a Seller and/or Buyer and looking at what we've crafted, there is a subtle issue remaining:
        i. As crafted, all females involved in the property transfer will be listed with their maiden surnames, which in most cases would not be the surname listed on the record at the time of the transaction since most females would be married and taken their husband's surname.
        ii. This raises the question of which is the desired name to be used for the Shared Fact Narrative sentence?
            1. If it's the maiden name, then we're done
            2. If it's the married surname and it's different from the maiden surname, then we still have a problem…
                a. A married surname is only available when using a Family Fact and they are the Principal Couple, along with their husband
                b. With RootsMagic's current capabilities, I think there are only 2 options available:
                    i. Customize the Sentence Template for everyone involved in that transaction by hard coding everyone's names and not use **[Buyer]** & **[Seller]** in the template

ii. Or, add a Note that states that the person abc was known as xyz at the time of the property transfer

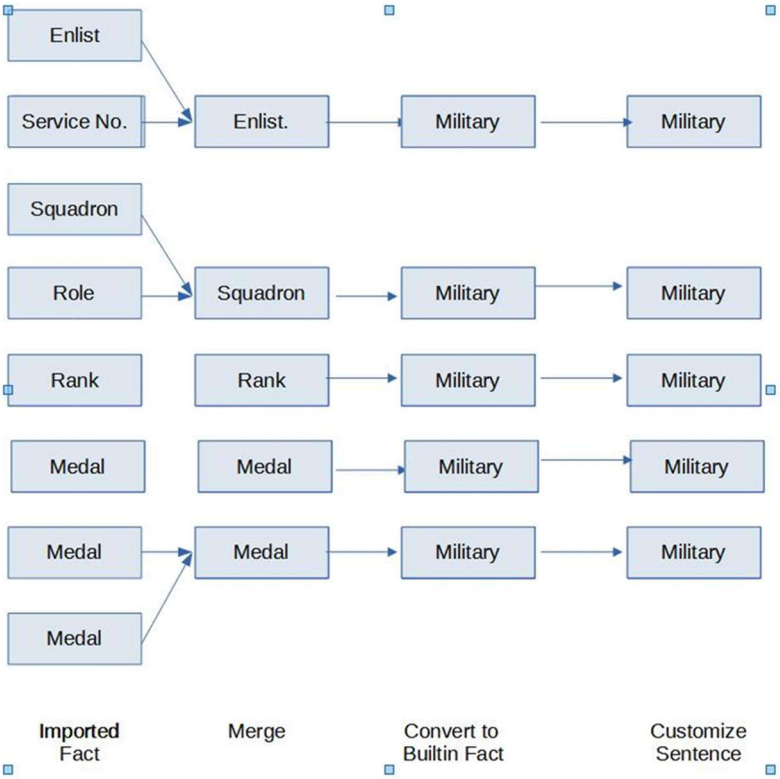
15. At the beginning of this example, I said we'd revisit our initial assumption that we could do all this with a single Fact Type
    a. I think we've succeeded, as long as we aren't also trying to preserve the information in a way that it won't get lost when transferring external to RootsMagic
    b. If there were other unique situations and we felt they might be common enough to warrant it, we could create additional Shared Supporting Roles to be assigned in lieu of **[Seller]** and/or **[Buyer]**
    c. Perhaps such as inherited property…
16. One last thing I want to highlight with this example of listing many people involved in an Event.
    a. Not everyone involved with a particular property transfer has to be added to your database as a separate individual:
        i. For your research, it may be beneficial to have a database record for each person involved in a transaction like this, but it's not required
        ii. **Reminder:** When sharing a Fact with other people, instead of finding an existing Person in your database, you can decide to share a Fact with people you don't want to add to your database by electing to just type in their names for the Shared Fact Role.
        iii. If you choose to share a Fact with people not in your database, they will still be listed as someone with the same assigned Role as others. Just remember:
            1. They won't have their own separate Role sentence, because they don't have a Person record and therefore won't ever have a Narrative generated about themselves
            2. And, you only have Given and Surname fields to record the desired name information

EXAMPLE #9 - Cleaning up Imported Custom Fact Types

I. **Premise:** This example is different from everything we've discussed so far. Don, one of our SIG members, contacted me last October with another situation and asked for my thoughts on how to proceed:
   1. He had transitioned his data from another genealogy software program to RootsMagic
   2. He has an ancestor in his family tree that was a gunner in the squadron that bombed the infamous Bridge Over the River Kwai as part of the Burma-China Campaign during WWII. He had military service information which he had originally recorded in his old software program
   3. When he imported the data into RootsMagic, it resulted in:
      a. Eight (8) separate Fact entries, using six (6) different Custom Fact Types, being created due to how his old software had captured each piece of information.
      b. As we know, each of these new RootsMagic Custom Fact Types initially doesn't have a Sentence Template.
      c. Plus, the way the information was broken up was making it challenging to create a cohesive narrative about this person's military service
      d. Original Import of Data - Edit Person window:

Age	Facts	Date	Details					
0	**Birth**	31 May 1921						-
19	**Enlisted**	30 Nov 1940	with service number					-
20	**Marriage**	20 Dec 1941	Some Place Wife AIRMAN-5					-
21	**Rank**	18 Dec 1942	China-Burma-India Technical Sargeant					-
-	**Medal**	(World War II)	China-Burma-India Distinguished Flying					-
-	**Medal**	(World War II)	China-Burma-India Air Medal					-
-	**Medal**	(World War II)	China-Burma-India China-Burma-India					-
-	**Regiment**	(world War II)	China-Burma-India 10th Air Force / 7th					-
-	**Service No.**	(World War II)	ASN xxxxxxxxx					-
-	**Trade/Skill**	(World War II)	China-Burma-India Gunner					-
23	**Witness-M**	Jun 1944	Western United Stat Husband LAST NAM					2
78	**Death**	10 Apr 2000	Western United Stat					-
-	**Primary Name**		J. B. AIRMAN-1					

4. This one individual was the only person in his database with extensive military history and he wanted to merge & simplify the information
5. I offered the same options to consider that I've provided everyone in the SIG Handout:
   a. Use the built-in Fact Type (Military in this case) for all, or some of the information
      i. The built-in Military Fact Type Sentence Template is:
      ii. [person] served in the military< [Desc]>< [Date]>< [PlaceDetails]>< [Place]>.
   b. Use the Miscellaneous Fact Type for all, or some of the information
      i. The built-in Miscellaneous Fact Type Sentence Template is:
      ii. [person]< [Desc]>< [Date]>< [PlaceDetails]>< [Place]>.
   c. Create separate Custom Fact Types for all, or some of the information
   d. Which option, or options, make the most sense depends on:
      i. How many people might have this information
      ii. And whether, or not, being able to filter or search, on the different types of military service information is desired
6. He decided to use the built-in Military Fact Type for everything and proceeded to clean up the data by:



   a. Merging information together where it made sense
   b. Changing all the Facts from using the Custom Fact Type to the built-in Military Fact Type
   c. Customize the Sentence Template for each of the Facts, primarily by changing the word "served" to something more appropriate for the information being documented
   d. The result was four (4) Facts, all using the built-in Military Fact Type each with a slightly customized Sentence Template
   e. Final Results –Edit Person window:

Age	Facts	Date	Details					
0	**Birth**	31 May 1921						-
19	**Military**	30 Nov 1940	and was assigned servi					-
20	**Marriage**	20 Dec 1941	Some Place Wife AIRMAN-5					-
21	**Military**	18 Dec 1942	China-Burma-India The with the 10th Air Force					-
-	**Military**	1942-43 (Worlc	China-Burma-India The received the military av					-
23	**Witness-M**	Jun 1944	Western United States Husband LAST NAME-(					2
78	**Death**	10 Apr 2000	Western United States					-
-	**Military**	1942-43 World	China-Burma-India The the Air Medal					-
-	**Primary Name**		J. B. AIRMAN-1					

7. The Resulting Narrative Report looks like this:

Narrative Report for J. B. AIRMAN-1

1. **J. B. AIRMAN** was born on 31 May 1921.[1]

He enlisted in the military and was assigned service number ASN xxxxxxxxx on 30 Nov 1940.[2]

He served in the military with the 10th Air Force / 7th Bombardment Group / 436th Bombardment Squadron as an aircraft engineer / gunner with the rank of Technical Sargeant on 18 Dec 1942 in China-Burma-India Theatre.[3]

J. received the military awards of the Distinguished Flying Cross w/Oak Leaf Cluster and the China-Burma-India Theatre Ribbon w/2 Battle Stars in 1942-43 (World War II) in China-Burma-India Theatre.[4]

He witnessed the marriage of Husband LAST NAME and Sister IN-LAW in Jun 1944 in Western United States.

He died on 10 Apr 2000 at the age of 78 in Western United States.[5]

J. received the Air Medal in 1942-43 World War II) in China-Burma-India Theatre.[6]

J. B. AIRMAN and Wife AIRMAN were married on 20 Dec 1941 in Some Place.

Wife AIRMAN, daughter of Father IN-LAW and Mother IN-LAW, was born on 12 Feb 1922 in Some Place.

She appeared in the census on 23 Apr 1930.

She appeared in the census on 11 May 1940.

Wife witnessed the marriage of Husband LAST NAME and Sister IN-LAW in Jun 1944 in Western United States.

8. This addressed everything Don wanted to accomplish. However, one needs to be aware that some of the Descriptions are longer than 100 characters and would be truncated if exported via Gedcom.

Summary

J. In summary:
   1. When it comes to Working With Facts, it boils down to what information about each person's life you want to record as Facts, or Events:
      a. In RootsMagic, there are a handful of "Special Fact Types" that have special properties and/or uses within the program
      b. The rest of the Fact Types are all created using the same structure and optional Data Fields
      c. The Fact Type names help differentiate the type of Fact or Event and the associated Sentence Template and Supporting Roles that can be shared with other people
   2. When it comes to Sentence Templates for Fact Types, it boils down to:
      a. What do you want to see when the data you enter for a Person is output in forms that include Sentences generated from the Sentence Templates
         i. It's up to each of us to decide whether we want to assign Supporting Roles by sharing Facts with other people
         ii. It's also up to each of us to decide if we want them to appear in the Principal, and/or the Supporting Role sentences of a Narrative report.
         iii. While deciding the above, we also need to be aware of the potential data transfer limitations should the desire to transfer RootsMagic data to another genealogy software product or online site
      b. If you attempt to modify and/or create your own Sentence Templates and don't' get the results you expected, and you can't figure out what the issue is, you have several options to get help and hopefully get it set up and working properly:
         i. You can post what you are trying to do at one of these sites:
            1. The RootsMagic Users FaceBook Group
            2. Or, the RootsMagic Community website
            3. There are some users that monitor postings at both sites that are very experienced in writing Sentence Templates. They can provide assistance, or explain why it can't be done with the current Sentence Template Language capabilities
         ii. Or, you can send an email to the RootsMagic SIG email address rootsmagic@gfo.org explaining what you are trying to do, and what you have tried so far.
            1. I'll take a look at it to see what advice I can offer
         iii. And, with your permission, perhaps share it at a future SIG meeting as another example of what can be done using the Sentence Template Language
   3. In the end, you'll need to decide how much effort you want to spend planning and customizing vs working within the built-in capabilities of RootsMagic Fact Types you want to do.