

# THE CLERGY OF THE CHURCH OF ENGLAND DATABASE

*An AHRB funded project*

## RESEARCH ASSISTANTS' HANDBOOK

Version 6.1  
*'Salisbury Edition'*

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# HOW THE HANDBOOK IS ORGANISED

Welcome to the *Clergy of the Church of England Database* project handbook. We hope that – whether you are a prospective or current Research Assistant for the project, a prospective user, or merely someone interested in finding out more about this ambitious project and how we have gone about tackling it – you will find its contents both helpful and interesting.

The handbook is divided into three parts. **Part 1** contains a general introduction to the project and an illustrated guide to the data-entry screens and how Research Assistants will navigate them as they enter data. It contains all the basic information you will need to understand what the Research Assistants will be asked to do. **Section I** introduces the scope and nature and project team of the *Clergy of the Church of England Database*. **Section II** describes the main types of source material we will be using for the project and the terms we will employ to refer to the various events and pieces of information you may be asked to enter. It also sets out the general principles that will govern all data entry. **Section III** contains examples of the data-entry screens that will be employed for inputting different categories of clerical data, and gives advice on how to navigate through and between screens. It also discusses any issues relating to the entry of data using a particular screen that are not relevant when similar information is being entered elsewhere.

**Part 2** of the handbook covers ‘**Equipment and Procedures**’. It contains information on how to handle the computer (**Section IV**) and software (**Section V**), and discusses how data is to be returned to the project and arrangements for payment of Research Assistants (**APPENDIX**).

Don’t be daunted by the length and apparent complexity of **Part 3**! Once you start entering data following the procedures in Part 1 you will find the software extremely easy to use, and may only occasionally need to turn to this reference section. The reference section is long because we have tried to supply you with clear and explicit guidance on ‘what to do next’ when confronted by dilemmas or complexities in the sources, and using the index you should be able to locate relevant advice quickly. (It is of course important that you read all three parts of the manual through at the beginning of your work for the project.).

# I

## THE PROJECT

**T**he *Clergy of the Church of England Database* will run for five years, and began formally in October 1999. Its objective is to construct a relational database of clergymen of the Church of England between 1540 and 1835, and it is funded by the Arts and Humanities Research Board. The database will fill a major gap in our knowledge of one of the most important professions in early modern England and Wales, and will take advantage of new technology to provide an invaluable research tool for both national and local historians who often need to discover biographical information about individual clergymen.

### *The Church of England between 1540 and 1835 and its records*

Throughout the period between 1540 and 1835 the Church of England was the single most important employer of educated males in England and Wales, and at times possessed an institutional presence that surpassed that of the state. The parish was the major unit of local government throughout this period. An understanding of the dynamics of the clerical profession, both in terms of individual careers and of fluctuations in the profession's overall size, distribution and character, is thus central not only to the interpretation of the development of society and religion, and especially the history of the professions, but also to studies of particular localities and regions or the biographical investigation of artistic, scientific, administrative, political and economic activity in England and Wales. At present the dispersal of relevant manuscripts in diocesan archives across the country has prevented any systematic investigation of the clerical profession – of the instances of clerical pluralism and non-residence, for example, or of the size of the profession at any particular date. As we all know, even the tracing of individual careers has been a time-consuming and frustrating exercise, not least because the few published sources are limited in both geographical and chronological scope. Thanks to the accurate documentary record of ordinations and preferments preserved in record offices, however, the basis for answering such questions as these exists to a greater extent than for other professions. By bringing together these sources, this project will create an invaluable resource not only for historians studying the Church, but also for those whose research touches in any way on the tens of thousands of clergy alive in the three centuries since the Reformation.

### *The nature and scope of the Clerical Database*

In October 1999 the project team began work on designing a relational database covering clerical careers to be made available in electronic form for public access over the World Wide Web. As the database will be a major research tool for scholars in many disciplines with a historical dimension, it is being designed in such a way as to enable a wide variety of data retrieval and analyses. Local historians and scholars will be able to establish the succession of clergy in particular localities, trace individual career-paths as they cross diocesan boundaries, and investigate such issues as patterns of clerical migration and patronage across geographical and chronological blocs of their choice.

Rather than containing a series of prose biographies, the database will record information about clerical lives in interlinked tables, and will consequently be well-

suites to facilitate not only biographical research, but also more structural investigations of the Church, its clergy, its livings and patrons. For the first time it will be possible rigorously to investigate the changing size and character of the clerical body over the whole period between 1540 (the creation of the first of six new dioceses by Henry VIII) and 1835 (the publication of the Ecclesiastical Duties and Revenues Commission report, which inaugurated the period in which reliable and regularly updated lists of clergy and their livings, e.g. *Crockford*, became available).

The principal records to be consulted are registers of ordination and institution, and licensing and subscription books, which will allow the key career data for almost all clergymen to be assembled. However, pressures on time and on the budget mean that we cannot abstract relevant information from every type of record. Educational qualifications and dates of death are two examples. We will record college affiliations and university degrees where they occur in our selection of records, but we are not able to undertake an exhaustive search of the registers of colleges at Oxford and Cambridge. Foster's *Alumni Oxonienses* and Venn's *Alumni Cantabrigienses* will still need to be consulted alongside our findings, though we expect our data often to correct and expand on these printed sources. Nor will we be systematically using wills or parish registers, with the result that entries are unlikely to record the precise date of death or burial of a cleric, although this can be estimated from the date that his successor was instituted to the last living he is known to have held. These are two obvious limitations of the proposed database. Its strength, which in our view more than compensates for this, is its national coverage across nearly three hundred years so that for the first time we can provide an accurate account of the careers of those many clergy who were ordained in one diocese, and subsequently held curacies or livings in two or three others. We also hope that our work will stimulate extraction of related records, which will advance local research, and which in the longer term may be possible to 'bolt on' to the database.

#### *The project team and their roles*

**Dr Kenneth Fincham**, Project Director, is Reader in Seventeenth-Century History at the University of Kent. He has published *Prelate as Pastor: the episcopate of James I* (Oxford, 1990), and edited *the early Stuart Church 1603-1642* (1993) as well as two volumes for the Church of England Record Society. He is also an associate editor of the *New Dictionary of National Biography*.

**Dr Stephen Taylor**, Project Director, is Reader in Eighteenth-Century History at the University of Reading. He has published widely on both the later seventeenth and the eighteenth centuries, including jointly editing – with John Walsh and Colin Haydon – *The Church of England c.1689-c.1833* (Cambridge, 1993). He is reviews editor of *Parliamentary History*, general editor of the Church of England Record Society, and an associate editor of the *New Dictionary of National Biography*.

**Dr Arthur Burns**, Project Director, is Lecturer in Modern British History at King's College London. He is author of *The Diocesan Revival in the Church of England c.1800-1870* (Oxford, 1999) and is one of the joint editors of a new history of St Paul's Cathedral to be published in 2004. He is also an associate editor of the *New Dictionary of National Biography*.

**Mrs Mary Clayton**, Senior Research Officer (from July 2003), completed an M.Phil. on eighteenth-century Haslemere at Royal Holloway College, University of London, in 1993. She has already worked for the Database Project as a Research Assistant in

the diocese of London, and most recently she has been a researcher for the Old Bailey Project at the University of Hertfordshire.

**Mr Tim Wales**, Senior Research Officer (from September 2003), was educated at the University of Cambridge and has a particular interest in the history of poverty and poor relief. He was most recently a Research Editor for the Oxford Dictionary of National Biography and is currently completing an edition of *The Visitation of London begun in 1687* for the Harleian Society.

**Dr Peter Yorke** was the Project's Senior Research Officer between 1999 and January 2003. He was awarded his Ph.D. on 'Iconoclasm, ecclesiology and "the beauty of holiness"' at the University of Kent in 1997 and is now revising it for publication. He is a contributor to the *New Dictionary of National Biography*.

The three project directors have complementary expertise in the interpretation of ecclesiastical records for the period 1540-1660 (Kenneth Fincham), 1660-1760 (Stephen Taylor) and 1760-1835 (Arthur Burns). At the end of the project they will also write an introduction, explaining its methodology and highlighting the great research potential of the database, to accompany its electronic publication. They are assisted by a Senior Research Officer, Peter Yorke, who for the academic year 1999-2000 is based at King's College London.

The Master Database for the project is based at the Centre for Computing in the Humanities, King's College London (CCH, KCL). The Centre has undertaken all the technical work for the project, including the design and development of the software. The work has been supervised by the Centre's director, **Dr Harold Short**, the project's Technical Director. Dr Short is also technical director of several other major projects, including the *Prosopography of the Byzantine Empire* and the *Prosopography of Anglo-Saxon England*, and is Chair of the Association for Literary and Linguistic Computing.

The Associate Technical Director is **John Bradley**, senior analyst in the CCH, who is also involved in various other projects, including the *Analytical Onomasticon to the Metamorphoses of Ovid* and the *Stellen bibliographie zum "Parzival" Wolframs von Eschenbach*. Dr Bradley was the designer and principal developer of the TACT text analysis system.

Much of the software development for the inputting screen has been carried out by the Technical Project Officer, **Dr Hafeed Walda**. Dr Walda is a freelance archaeology and IT consultant, and has also worked for the *Daidalos* database of Ancient Sculptors at KCL and the *Corpus Vitraeaum Medii Aevi* at the Courtauld Institute for Art. Dr Walda has also directed excavations at Lepcis Magna in Libya over the past three years, and will shortly publish a book on Libyan contributions to Roman art.

## II

# SOURCES AND DATA

The Clergy of the Church of England Database will seek to record as much information concerning what we call ‘clerical events’ as can be extracted from the official records of the Church with the resources we have available. Church records contain very reliable information on most of the key events that occurred in clerical careers, and the information is usually contained in records that adopt a common format in which the same elements occur in the same order, making data-recovery comparatively straightforward. Matters become more complicated, however, when the most useful sources have been lost or destroyed. The project directors are visiting each diocese in advance of recruiting research assistants to identify lacunae in the records and to develop strategies for attempting to recover the missing information using the records that do survive in each case.

### *The records*

In all dioceses, the most important sources will be the episcopal records, above all subscription books, episcopal registers and act books, ordination books, registers of orders, and liber cleri. We have therefore designed a series of screens tailored to the structure and nature of the records these contain. **Episcopal registers** and **act books** are generally records of events that required the authorisation of the bishop and in particular the most important appointments and decisions of the bishop. They contain, for example, records of the institution and collation of clergy to livings, and in some cases of ordinations, licensings and resignations. The exact make up of the register or act book varies considerably from diocese to diocese, but most also contain many records irrelevant to the project, such as records of land transactions or consecrations of churches. Other act books exist for deans and chapters and other clerical authorities who sometimes possessed ‘ordinary’ or ‘peculiar’ jurisdiction over certain parishes or offices, and in such cases carried out many of the same acts recorded by bishops in their registers. **Ordination books/ registers** and **institution books** are more specialised versions of the same type of record, confined to records of one or more type of clerical event.

**Subscription books** record the taking of oaths which often accompanied clerical events. In many dioceses several such books could be on the go at the same time, as oaths were often taken by ‘surrogates’ acting on behalf of the bishop. Depending on local tradition, they sometimes record much more information than merely the oath and its occasion, and can be particularly useful in recovering the names of curates or covering gaps in the sequence of registers. In some places, for example, Chichester, the records they contained were so detailed that eventually a decision was taken not to continue a separate register.

**Liber cleri** and **registers of orders** (sometimes called ‘consignation books’, ‘exhibition books’ or ‘visitation books’) are both forms of records created at the formal episcopal ‘visitations’ of the diocese, which occurred in all dioceses at an interval of several years. Similar records were also generated by annual archidiaconal visitations. The ‘liber cleri’ was a call book in which the attendance of clergy at the visitation was noted down, and they thus provide snapshot pictures of the clergy of a particular area at a particular date, usually also including curates and schoolmasters. They can sometimes be used to cover gaps in other record sequences. Registers of orders record the practice

of asking clergy attending the first visitation of a new bishop to bring along all their documentation: licences, ordination papers, records of appointment etc. for inspection (newly appointed clergy were also sometimes asked to bring their documents to the first visitation they attended in the diocese). The registers thus record in varying detail important events in the clerical careers of those present, which could prove invaluable in record linkage or filling gaps.

### *Clerical events*

Perhaps the simplest way to introduce the 'clerical events' with which we will be concerned is to follow them through the life of a typical clergyman.

A clerical career began with the entry of a candidate into the clerical order through the act of '**ordination**'. Only a bishop could ordain a clergyman, and the records of ordinations are commonly found in episcopal registers, although in some cases bishops maintained separate records of ordination. Ordinations are also sometimes indirectly recorded through the record of the subscriptions made by the person being ordained, or in a register of orders. Most clerics underwent two successive ordinations, one to the order of deacons, and one (usually after a decent interval, but sometimes almost simultaneously) to the order of priests, although in the earliest part of our period there were several other ranks to which candidates could be admitted. Records of ordination usually include important information on the educational career of the candidate. They also sometimes record the name of the position to which the candidate had a 'title', and in some cases where this was a curacy, the salary which he would receive once in post. More generally they record the name of the ordaining bishop. Most clergy were ordained by the diocesan bishop, sometimes in the cathedral, sometimes in a diocesan church or the episcopal palace, sometimes in London. When a bishop was ill or circumstances made such ordination inconvenient to either bishop or candidate, however, the ordination might be carried out on '**Letters Dimissory**' by another bishop. Where no full record of ordinations survives, we may seek to make use of '**ordination papers**' which are the bundles of documents provided by the candidates to support their application.

### **An ordination record**

On Sunday, 3rd July 1761, a general ordination was held by the Right Reverend Robert Bishop of London in the chapel of the episcopal palace at Fulham.

#### Priests

John Jones BA Corpus Christi College Cam.

Philip Peters MA Ball. Coll. Oxon

James Sellers MA Trinity Coll. Oxon

#### Deacons

Francis Hatchard BA Trin Coll Dublin

John Douglas MA Trinity Coll. Oxon

Peter Johnson BA Alban Hall Oxon (on letters dimissory from the Bp of Hereford)

William Weekes Literate

Once in orders, the clergyman would seek his first appointment. In many cases this would take the form of a curacy, to which he might be nominated by the incumbent of the living to whom he would provide assistance. Our record of such event usually

takes one of the following forms: a record in the register or a separate licensing book recording the issue of a licence, sometimes accompanied by details of the person nominating the curate and the salary agreed; a record in the subscription book of the oaths taken when the licence was issued (though not necessarily on precisely the same day - hence the need to record the event as a subscription and not a licensing), sometimes accompanied by details of the salary; a printed form of licence of a standard format bound up into a separate volume (the standard record in the early nineteenth century). One of the most frustrating things about the records from which we work is that it is clear that often very few curates were being formally licensed, or at least the issuing of licences was not being properly recorded. Sometimes bishops attempted to 'round up' curates in the diocese, but otherwise we may come across these shadowy figures in records of attendance at visitations (*liber cleri*). Just occasionally we may be able to use loose bundles of 'licensing papers' which survive.

#### **A record of the licensing of a curate**

March 20 1760. John Cookesley Clerk, AB, was licensed by his grace to perform the office of a curate in the parish church of Brasted, a peculiar in Kent, and a salary of seventy-five pounds per annum was assigned to him to be paid by George Heath Clerk DD Rector of the said parish. So I attest GW Dickes

#### **A record of a subscription associated with a licensing**

I James Ford Clerk AB to be licensed to perform the office of a Curate in the parish Churches of Newington and Halston in the County of Kent and Diocese of Canterbury do willingly and from my heart subscribe to the Thirty-Nine Articles of Religion agreed upon by the Archbishops and Bishops of both Provinces and the whole clergy in the Convocation holden at London in the year 1562 and to the Three Articles of the 36th canon of the Canons Ecclesiastical published in 1603. Witness my hand this fourteenth day of July in the year 1802.

One complication we encounter is that records of the appointment of "perpetual curates", who were also licensed, but who were not assistants in the same way, are often not very clearly differentiated. In many cases the word 'curate' was used without qualification in records of the licensing of perpetual curates, and the best clues to the fact that we are dealing with a perpetual curate are that it was more common in this instance to record the name of the previous holder of the office, there is unlikely to be any mention of a salary, and the name of the nominator is unlikely to be that of the incumbent of the living.

We also encounter licences or related subscriptions for other positions: notably schoolmasters and lecturers/preachers. We want to record these, but not those for non-clerical positions, such as surgeons.

As we see in the case of the curate, the process by which a clergyman gained a position involved several stages, and depending on the records which survive, we may need to record appointments through using any one or more of them. Moreover the process varied according to the status of the position to which a clergyman was appointed.

In the case of appointments to cathedral stalls, offices or prebends, and of rectories and vicarages, several different records were generated, not all of which can be taken as reliable evidence that the appointment was actually made, and not all occurring on the same day. We therefore need to record precisely which stage of the process a record relates to.

A clergyman would be '**presented**' to the living by the patron of the living, and in some cases we may need to use the records this generated, although this is perhaps the least reliable indication of an actual appointment taking place. Far more useful is the record of the '**institution**' of the clergyman by the ordinary holding jurisdiction over the living (or where the ordinary was also the patron a '**collation**'). The records of these events are often particularly rich, including not only details of the patron(s) who presented the candidate to the living, but also details of his education and the name of the previous incumbent, often accompanied by the reason for (but not the date of) the vacancy. In order to obtain a more precise date for the vacancy which an appointment was designed to fill, we will sometimes make use of the separate records which sometimes survive of the '**resignation**' of livings by incumbents. A final set of records which we may need to rely on in some places are those of the '**induction**' or (in the case of cathedral clergy) '**installation**' of the candidate to his position, the terminal act in the process when often a junior diocesan officer would confirm the clergyman in possession of his new office. One complication which affects some records of these sort of actions is that some bishops delegated the power of institution to subordinates by way of '**commission**'. In these instances our sources often contain separate records of the issuing of the commission and the act itself, which in some cases means that much of the most useful information about the person instituted is recorded in the note of the commission rather than that for the institution itself. In these cases we may ask researchers to input information from both records into a single screen.

#### **A record of the institution of a rector**

On the twenty-fifth day of January in the year ... 1788 Richard Postelthwaite clerk was admitted and instituted by the Rt Revd. Beilby, Bishop of London to the Rectory of Nevendon otherwise Nenvendon in the county of Essex and diocese of London void by the death of John Pawley clerk the last incumbent and belonging to the presentation of John Thornton of Clapham in the County of Sussex Esq the undoubted patron thereof ...

#### **A record of the resignation of a vicar**

On the 20th Day of December the aforesaid year the Right Revd John Bishop of Chichester accepted the resignation of the vicarage of Steyning in the county of Sussex made personally by John Gray Clerk, MA

#### **A record of the issue of a commission**

January 16 1762 a special commission was granted to Christopher Smith MA Rector of Langton by the Right Revd. John, Bishop of Bristol, to institute Robert Gutch BA to the Rectory of Brianston in the County of Dorset and Diocese of Bristol void by the death of John Smith, Clerk, the last incumbent thereof on the presentation of Henry William Portman of Orchard Portman in the county of Somerset in full right.

Memo: by a certificate it appears that the said RG was accordingly instituted on the 20th January 1762.

Where none of these records survive, as in the case of the curates we may need to reply on the records of '**subscription**' associated with the appointments.

There are three other main types of sources that enable us to retrieve information relating to clerical events. First, '**Liber cleri**' record the attendance of clergy (importantly including curates) at visitations of the diocese, and thus enable us to compile a record of who was in post where at a particular date. We have designed a screen to enable the barebones information they contain to be entered as rapidly as possible. At some visitations, a record was made of all the clergy's own documents relating to ordination and appointment. From these were compiled the '**Registers of**

**Orders'** which we will be able to use to obtain records of events earlier in clerical careers. A set of screens will help deal with the fact that the records are thus at one remove from the events. Finally, there are records of the granting of permission to hold livings in plurality, which are of obvious importance to the project in assisting record linkage. These '**Dispensations**', issued by the archbishop, are sometimes recorded in registers of orders, but can also be obtained from the records of the archbishopric of Canterbury.

#### **An example of a record from a Liber Cleri**

Basildon	John Smith MA vicar present Peter Jones BA curate absent James Percall schoolmaster present
Bradford	vicar vacant Peter Wales BA curate present

#### **An example of the issue of a dispensation**

Henry Twistleton Clerk AM of Catherine Hall in Cambridge, and chaplain to the Rt Honble Henry Earl of Tholand, being already possessed of the Rectory of Westmill in the County of Hertford, and Diocese of Lincoln, valued at £20, real value about £60 per annum, & presented to the Rectory of Widington in the County of Essex, and Diocese of London, valued at £25, real value £500 per ann., distance from each other about 9 miles, Petd. his Grace for his Disp. which was granted by fiat Nov. 30 1717.

As you are probably aware, in some dioceses at certain periods the records only survive in the most fragmentary form. Where all else fails we may turn to two other types of record not ideally suited to our purposes but which contain relevant information. The **Bishop's Transcripts** are annual returns signed by either the minister or churchwardens of births, marriages and deaths in the parish: these may consequently inform us as to the identity of an incumbent at a specific date in a parish's history. **Probate records** are primarily wills, but also inventories or grants or bonds of administration, which can in the case of those relating to the clergy may inform us both of the office and location of a cleric, and provide a useful guide to the date of his death in the date of the probate or inventory.

The databases into which you enter the data are specifically tailored to the capture of the data: when you return your disks we will transfer the data you collect using them into a completely different database with its own distinctive structure, the 'Master Database'. The process of filtering that this will involve will allow us to identify interconnections hard to perceive or record in the inputting databases.

By doing this, as we indicated at the outset, we hope to draw important conclusions about the Church and clergy on both a national and a local scale from our findings. This will only be possible if each entry is made in accordance with certain clearly defined procedures. Failure to follow such protocols for even a small number of entries could potentially invalidate results from the whole project.

We have therefore defined six **key principles** to underpin all the other guidance offered in the *Research Assistants' Handbook*. They are set out below.

# Key Principles

## 1: CONSISTENCY

You should ensure that all the data is entered consistently in the prescribed manner. Any anomalies must be recorded in the 'Comment' and 'Problem boxes' rather than inserted in the other data boxes in a manner inconsistent with the criteria for entry.

## 2: THOROUGHNESS

Future users of the *Clergy of the Church of England Database* must be confident that any relevant information contained in the sources we have selected is also contained in the database. They should not need to examine the sources themselves to recover information that might have been omitted regarding those aspects of clerical lives which the database embraces. When the completed national database is launched in 2004 it will be accompanied by a handbook specifying the sources which have been included, in some cases listing pages/folios which have been chosen from within documents which contain other information which has not been entered. It is therefore important that you ensure that all relevant material is extracted. If you encounter information which you are not certain is relevant to the database but are not confident that it can be safely ignored, you should record it in the 'Comment/Problem boxes'. It is also important that you do not 'skip' entries, even where you are certain that a record duplicates material already contained in the database. Future users may well welcome the fact that events are recorded in more than one source.

## 3: ACCURACY

It is obviously crucial that names, dates, place names and other material extracted for the database are transcribed with care. Not only will errors prove frustrating for future users, but they will also seriously handicap the project's ability to link together records pertaining to the careers of individuals. You will no doubt often find yourself uncertain about the correct reading of an entry, as the Project Directors themselves found during the preliminary examination of the records. In such circumstances you should not hesitate to record that uncertainty following the guidance offered in the relevant section of the handbook, rather than make a 'best guess'. It is also important that where you are responsible for entering the name of the bishop or ordinary responsible for a clerical event, say, for example, in a register covering more than one episcopate, that you are very careful to ensure that the correct ordinary is entered for every event. Similarly, if a database is to contain entries from more than one source, you must be careful to remember to change the source name.

## 4: 'WHAT YOU SEE IS WHAT WE GET'!

Local traditions in record-keeping and ecclesiastical organization mean that the records in all dioceses are likely to throw up surprising and puzzling anomalies and departures from standard forms of description of offices, status, etc. Indeed one of the most exciting aspects of the project is that it is likely for the first time to expose such regional variations in ecclesiastical organization to serious scholarly investigation. It is therefore

important that you do not attempt to ‘correct’ even minor irregularities in nomenclature except where the relevant section of the manual *explicitly* instructs you to do so. This principle reflects an underlying principle of the project as a whole, which is that it has been decided in almost all circumstances to retain the form in which data is found in the sources. The same principle underlies Principle 5:

### **5: IGNORE ‘LOCAL KNOWLEDGE’**

You may already be familiar with the records you are inputting, and you may also already know a great deal about the clergymen to whom they refer. You might know, for example, that ‘Thomas Jones’, vicar of Peopleton, is the same person as the ‘Thom. Johnes’ recorded as rector of Goodton, about whom more details, or more accurate information, are available elsewhere. Nevertheless, such local knowledge must not be used to make corrections to the data recorded in the boxes, or to supply missing information. It would be helpful to have such information entered in the ‘Comment boxes’, if it is immediately to hand, but it must not ‘contaminate’ the recording of the information as set out in the sources. This is equally the case where a scribe entering two or more events involving the same person in quick succession leaves out details regarding, for example, education in all but the first entry.

### **6: FOLIO BY FOLIO**

Unless the contract document for the source *explicitly* specifies otherwise, the entry of information from any source should proceed on a folio-by-folio basis, even if this may at first glance appear inefficient. Faced by a large document requiring the use of several different inputting screens, you might be tempted to proceed in a different manner, for example first extracting all the ordinations, and then turning to the institutions, the licensings etc. However careful you were, this would inevitably carry the risk that some entries might inadvertently be omitted. We would therefore ask you to record the information in the database in the sequence in which you encounter it in the source.

### III

## THE SCREENS AND HOW TO USE THEM

This section takes you step-by-step through the data-entry sequence established for the various screens we will be using, shows you examples of completed screens, and explains which other sections of the Handbook will help you with the entry of particular elements.

#### *Which screen?*

As we explain in **Part 2**, when you begin work as a Research Assistant you will be issued with a laptop computer already loaded with files, which will be used to enter the information contained in the documents that you have contracted to enter. There will be at least one, and possibly more than one, file designated for each document, identified by a filename based on the shelfmark of the document. Each of these files will have been tailored to be as appropriate as possible for the entry of the data contained in the document to which it relates. In particular it will contain a series of screens that will have been chosen to reflect the range of clerical events and the richness or sparsity of the information contained in the records. You will receive instructions on which types of events should be recorded using which type of screen. The choice of screen to record a particular type of event may well be different depending on the nature of the individual document: thus subscriptions may sometimes be recorded on the 'subscription' screen, but in other instances may require the use of separate 'ordination' and 'appointment' screens.

#### *What to do if a document never provides the information required for a particular box*

While we will make every effort to ensure that the screen is as appropriate for its task as possible, it is inevitably the case that it may not precisely match the document. It may contain a box for the entry of information never to be found in a particular set of records. Thus the 'appointment' screen will always contain provision for the entry of fairly full details of a clerical educational career, but you may find that a document for which you are instructed to use this screen *never* contains such full information. Where the missing element is not essential to the identification of an event (such as the name of the cleric, the location, date or event type where relevant) just leave the relevant boxes blank. You do not need to enter the fact that there was no such information in the 'Problem box' on every record. You should only do this where the information is physically present but illegible, or the document has been damaged so that information which would normally be there has been lost, or it is clear that a scribe failed to fill in a section of the record. In the cases of the more important elements in the record, please follow the guidelines set out in the relevant paragraphs of **Section II**, such as the **Key Principles**, and in **Part 3**, especially sections on 'Missing, blank or illegible' data. If a minor element of information is always missing, you might let the Senior Research Officer know when you send in the data you have extracted, as it might help in processing the data.

*'Red box'*

In each screen the first thing you may need to do is alter the 'Red box' information relating to the source and ordinary. Use the mouse to click on these items.

*What to do if a document requires the use of several screens*

When you are dealing with an episcopal register, for example, you may find that you are instructed to use two or more screens to enter the data. You will find that the file designated for that document contains all the relevant screens, and that you can move easily between them using the 'Palette' facility in FilemakerPro (see **Part 2, section V** below). If you find you encounter information for which none of the screens in the file seems appropriate and which does match another screen described in this handbook, *please let the Senior Research Officer know as soon as possible.*

## III.1 HOW TO FILL IN THE 'APPOINTMENT' SCREEN

### See example screens 1.1-5

This screen is used for entering a variety of clerical events, but chiefly institutions and collations recorded in an episcopal register, or licences granted to curates (including perpetual curates). It can also be used for entering material relating to presentations and resignations. In some instances you may also be asked to enter details of subscriptions where they serve as substitute records for collations, institutions, etc.

On activating the screen by pressing '**New Record**', the first thing to do is to check that the 'Red box' information is correctly set for the first record. Use the mouse and cursor to select from the drop-down menus or to enter the appropriate material for 'Source', 'Source Type', 'Ordinary' and 'Jurisdiction' following any guidance in the schedule. Ignore 'Source date' unless dealing with a register of orders. Remember you may need to alter some of this information as you proceed through the documents allocated to the database. Now proceed to enter the date and the personal details of the clergyman who is being appointed. Enter as much information as is provided in the source (you may find there are some boxes which the source you are using never enables you to fill). Where there are drop-down menus and the item you wish to enter is not present you may need to use the 'other' option and enter the item in the 'Problem box'. Now click on the first Ev Date box. You will find the cursor moves through the following sequence of boxes:

- 1) **Ev Date d/m/y:** Enter the date on which the event occurred, following the guidelines in VI.2. Use the tab to move from the day to the month and the year fields in order.
- 2) **Surname:** Enter the surname, following the procedures in VI.1.
- 3) **Forename:** Follow the procedures in VI.1. For Latin forenames, see the handlist with which you are issued.
- 4) **EdQual:** There is a drop-down menu here. Enter the degree following the guidelines in VI.1 on 'Educational Qualification'. This is also where you enter fellowships using the 'other' procedure.
- 5) **Title:** There is a drop-down menu here. See VI.1.
- 6) **EdUniv:** There is a drop-down menu here. Enter the university attended by the cleric, following the guidelines in VI.1.
- 7) **EdColl:** Enter the name of the college from which the degree was obtained or at which the fellowship is held, following the guidelines in VI.1.
- 8) **EdYear:** Enter the year in which the degree was awarded if recorded.

The cursor will next move on to the section of the screen concerned with the event.

- 9) **Type:** There is a drop-down menu here. Enter the type of event that is being recorded. (If you have been asked to enter the contents of a subscription book using this screen, please follow the instructions in your schedule as to whether to record the

‘subscription’ itself or the nature of the event to which the subscription relates.)

- 10) Office** There is a drop-down menu here. Enter the office to which the clergyman is being appointed, following the guidelines in VI.3.
- 11) Location\_1:** Use this box to enter the name of the parish, institution or jurisdiction following the guidelines in VI.4. Make sure you are clear which information if any needs to be entered in “Location 2”.
- 12) Location\_2:** Enter information (if any) that should be entered in this box following the guidelines in VI.4.
- 13) Location\_3:** In certain dioceses you will be asked to enter the county here (see the relevant supplement).

The cursor now moves on to the section of the screen which will contain information relating to the patron involved in the appointment. If the appointment you are recording is of a type which does not involve a patron, such as licensing to a curacy where no nominator is mentioned, or resignation, you may now click on the ‘**Problem Description**’ or ‘**Comment Boxes**’ (see below, **23/4**). You may need to proceed to enter information on the previous holder of the office, in which case go to the **Vacancy Tab** (see below, **25**). Or there may be nothing more to add, in which case click on ‘**New Record**’.

- 14) Pat\_Type:** There is a drop-down menu here. Record the patron type following the guidelines in VI.5.
- 15) Pat\_Role:** There is a drop-down menu here. Record the patron role following the guidelines in VI.5.
- 16) Pat\_Gender:** There are three buttons. Click on the appropriate one following the guidelines in VI.5.
- 17) Surname:** Enter the surname of the patron following the guidelines on spelling set out in VI.5. Where a patron is not a named private individual you will still enter information here relating to ecclesiastical corporations/ named offices etc., so read the discussion of how to enter information relating to different types of patron in VI.5 carefully before beginning.
- 18) Title:** There is a drop-down menu here. Enter the title if any of the patron: see VI.1 on how to do this. Where a patron is not a named private individual you may still enter information here, so read the discussion of how to enter information relating to different types of patron in VI.5 carefully before beginning.
- 19) Forename:** See VI.1 and the handlist for Latin names for entering forenames. Where a patron is not a named private individual you may still enter information here, so read the discussion of how to enter information relating to different types of patron in VI.5 carefully before beginning.
- 20) Gender:** Click the appropriate button to classify the individual patron being entered following the guidelines in VI.5. You are offered a choice of ‘M’ (male) or ‘F’ (female).
- 21) Guardian:** Use these buttons to enter the relationship between various people involved in patronage where one is acting as a proxy for

another. See the section on 'Guardians and proxies' in VI.5. This *does not* only apply to Guardians, but also to those exercising the patronage as proxies for the mentally ill or Roman Catholic patrons. If no such proxy relation exists, do not enter anything here.

**22) Residence/Office:** Use this box to enter information relating to the residence and office held by individual patrons, following the guidelines in VI.5. Remember, when entering information about some office holders identified by their position, such as bishops, this should be left blank. So read the discussion of how to enter information relating to different types of patron in VI.5 carefully before beginning.

If there is only one patron involved in a presentation, you may now have finished entering the information on this screen: you may need to click on the 'Vacancy' tab at this point to continue. Alternatively you may have further patrons to enter where multiple patrons are involved (see the relevant section of VI.5). In this case continue to enter further patrons until all have been entered.

You can also choose at this point to click on

**23) Problem Description** and/or

**24) Comment** to enter any relevant material following either the guidelines on using these boxes set out in the discussion of each of the other boxes in **Section VI**, or the overall principles set out in the section on **Key Terms**.

When you have finished with these boxes you may be in a position to proceed to a new record by clicking on '**New Record**'. But in many instances you now need to click on the

**25) 'Vacancy' tab.**

This will enable you to continue entering material from the record that relates to the previous incumbent of a living, and will take you to a separate vacancy screen. Please note, this is *not a new record*, but a continuation of the one on which you are already working. If you click on '**New Record**' what you now enter will not be linked to the material already entered. After clicking on and activating the 'Vacancy' screen, you will find the cursor moves in the following sequence. Enter as much information as is provided in the source. First enter the personal details of the previous incumbent.

**26) Surname:** Enter the surname of the previous holder of the office here, following the procedures in VI.1.

**27) Title:** There is a drop-down menu here. See VI.1.

**28) Forename:** Follow the procedures in VI.1. For Latin forenames, see the handlist with which you are issued.

**29) EdQual:** There is a drop-down menu here. Enter the degree following the guidelines in VI.1 on 'Educational Qualification'. This is also where you indicate fellowships using the 'other' procedure.

- 30) Ap\_EdUniv:** There is a drop-down menu here. Enter the university attended by the cleric, following the guidelines in VI.1.
- 31) EdColl:** Enter the name of the college from which the degree was obtained or at which the fellowship was held, following the guidelines in VI.1.
- 32) Ap\_EdYear:** Enter the year in which the degree was awarded if recorded.

Then enter details concerning the nature of the vacancy.

- 33) Ev Date:** Enter the same date as given for the appointment.
- 34) Vac\_Reason:** There is a drop-down menu here. Enter the explanation of the vacancy offered by the source. If the reason given by the source does not appear on the menu, please enter “other” and record the reason in the ‘Comment Box’.
- 35) Office and  
36/7/8) Location:** These will be carried forward from the appointment screen and so will not need to be filled in.

Tab through 36-8 or click on

- 39) Problem Description or  
40) Comment** to note any difficulties or additional information concerning the vacancy.

You will now have entered all the fields available. If there is anything else left that you think might be valuable to the project please use the relevant **Comment** box (24 or 39) or note any outstanding concerns in the **Problem Description** box (23 or 38). You can return to the ‘Appointment’ screen using the ‘**Appointment Tab**’ at any point.

**WHAT FOLLOWS IS IMPORTANT.** When you are confident that you have completed the entry, **make sure that you are back in the ‘Appointment’ section of the screen** and then click on ‘**New Record**’.

#### **A note on deletions**

Note that there is an additional button for deleting records of individual patrons at the left side of the patron section of the screen. You should use this to delete patron records if you are deleting the remainder of the screen using the ‘Delete Record’ button, or simply to remove a single patron record.

## III.2: HOW TO FILL IN THE 'ORDINATION' SCREEN

### See example screen 2

This screen is only to be used for the recording of ordinations or the issue of letters dimissory. It is designed to be equally easy to use whether a document is recording occasional ordinations as part of a sequence of different types of events, or is dedicated to providing lists of ordinands. (It may on occasion be used with other screens for entering materials in a subscription book.) For ordinations recorded in Registers of Orders there is a slightly simpler version of the same screen.

On activating the screen by pressing '**New Record**', the first thing to do is to check that the 'Red box' information is correctly set for the first record. Use the mouse and cursor to select from the drop-down menus or to enter the appropriate material for 'Source', 'Source Type', 'Bishop', 'Diocese' and 'Ordaining Bishop' following any guidance in the schedule. Normally the entry for 'Bishop' and 'Ordaining Bishop' will be the same. Remember you may need to alter some of this information as you proceed through the documents allocated to the database. After this, the first thing to enter is the personal details of the clergyman who is being ordained. Enter as much information as is provided in the source (you may find the level of detail contained even in a single source varies considerably). Where there are drop-down menus and the item you wish to enter is not present you may need to use the 'other' option and enter the item in the 'Problem box'. Now click on **Ev Date**. You will find the cursor moves through the following sequence of boxes:

- 1) **Ev Date d/m/y:** Enter the date of the ordination here, following the guidelines in VI.2. Use the tab to move from the day to the month and the year fields in order. The date you enter will automatically be carried forward to the next record facilitating the entry of multiple ordinations.
- 2) **Surname:** Enter the surname, following the procedures in VI.1.
- 3) **Forename:** Follow the procedures in VI.1. For Latin forenames, see the handlist with which you are issued.
- 4) **Ed Qual:** There is a drop-down menu here. Enter the degree following the guidelines in VI.1 on 'Educational Qualification'. This is also where you indicate fellowships, using the 'other' procedure.
- 5) **Title:** There is a drop-down menu here. See VI.1
- 6) **Ed Univ:** There is a drop-down menu here. Enter the university attended by the cleric, following the guidelines in VI.1.
- 7) **Ed Coll:** Enter the name of the college from which the degree was obtained or at which the fellowship is held, following the guidelines in VI.1.
- 8) **Ed Year:** Enter the year in which the degree was awarded if recorded.

**If your document contains such information as age, residence, date of birth, etc, the tab sequence will now proceed as follows; otherwise the**

**tab sequence in your database may now take you to 13 below:**

- 9) Date of Birth:** Enter the date of birth if recorded.
- 10) Age:** Enter the age of the cleric being ordained. Please remember that, if the source states ‘in his 25<sup>th</sup> year’, his age should be recorded as 24.
- 11) Residence:** Enter any details provided about the ordinand’s place of residence.
- 12) Birthplace:** Enter details of the ordinand’s birthplace if recorded.

The cursor now moves on to enable you to enter material relating to the ordination recorded in the document.

- 13) Ev Type:** Select the event from the drop-down menu. This will carry forward, facilitating the entry of group ordinations. If the record relates to the *issue* of letters dimissory, now proceed to Box 16.
- 14) Ev Place:** Enter the place at which the ordination occurred here. See VI.6 on how to decide what to enter here and what to enter in box 15. The entry you make will automatically be carried forward to the next record facilitating the entry of multiple ordinations.
- 15) Ev\_Church:** Enter the church in which the ordination occurred here. See VI.6 on how to decide what to enter here and what to enter in box 14. The entry you make will automatically be carried forward to the next record facilitating the entry of multiple ordinations.
- 16) ClerStatus:** There is a drop-down menu here. Enter the orders that are being conferred on the clergyman here. The entry you make will automatically be carried forward to the next record facilitating the entry of multiple ordinations.

In some records, there is a note of the ‘title’ on which a clergyman was ordained deacon: either an office, a place (e.g. ‘Willesden’, but no mention of post), an Oxbridge fellowship or even the private income of the candidate. Where a cleric was priested, the title may have been his current office. Where either of these is recorded, we would like you to record it in

- 22) EvEntit.** Please enter the title as free text as recorded in the source.

You may now have entered all the information relevant to the ordination of the individual concerned that is contained in the record. In this case you may click on ‘**New Record**’ to commence entering details of another ordination. The information contained in boxes **18–12** will be carried forward to help you if you are dealing with another ordination on the same day and to the same clerical status. But *please be careful to ensure that you alter clerical status and event type if you move from recording the priesting of clerics to the ordination of deacons etc. or vice versa, or from issue of letters dimissory to ordinations etc.*

Alternatively, you may have found some difficulties in completing the record, or encountered additional information you wish to note down for the Senior Research Officer. In this case now click on **19) Problem Description** and/or **21) Comment**. For example, some records of the issue of letters dimissory record the date of the subsequent ordination. Record this in the Comment Box.

Thirdly, you may have encountered a case of an ordination conducted on the basis of the issue of letters dimissory. In this case click on

**17) Letters Dimissory:** This button indicates the use of letters dimissory by another bishop to send the cleric for ordination by the bishop whose records you are entering. After clicking it you should proceed to complete

**18) Authorising - Bishop:** Enter the name and diocese of the bishop issuing the letters dimissory here following the guidelines set out in VI.6.

Fourthly, the record may state that the ordination was not carried out by the incumbent diocesan bishop, but was in fact conducted by another bishop (NB this is not the same as the issuing of letters dimissory, which were not involved in these cases). In this case, click on boxes **20) 'Ordaining Bishop Name'** and **21) Diocese** in the **'Red box'** section of the screen and enter the bishop who performed the ordination. (Normally, this will be in the form, e.g., 'Robert St Asaph', but, if the bishop's surname is recorded in the record, please include it in your entry.) A dialogue box will then appear on the screen stating that 'This field is defined to contain only specific values. Allow this value?.' Click on 'Yes'. If the record makes clear the relationship between the diocesan bishop and the bishop performing the ordination, click on **21) Comment** to enter a note about that relationship.

You should now have completed entering all the material relating to an ordination. Either click on **'New Record'** to start recording another ordination as described above or tab on to

**19) Problem Description** and/or

**21) Comment:** to enter any relevant material following either the guidelines on using these boxes set out in the discussion of each of the other boxes in section VI, or the overall principles set out in the section on **Key Terms**.

After completing these boxes click on **'New Record'**. In the top left of the screen a 'Duplicate Record' button has been provided to speed entry where a lot of names are listed and nothing else changes. We would ask you to use it with care to avoid missing important changes, and also to bear in mind that when used *everything* in the record, comments included, is carried forward. It may be safer to rely on the standard carrying-forward mechanisms.

### III.3 HOW TO FILL IN THE 'SUBSCRIPTION' SCREEN

#### See example screens 3.1-3

As explained in **Section VI.7**, the 'Subscription' screen is primarily intended for recording subscription records that contain only a minimum of information concerning the event to which the subscription was related, or indeed where a subscription occurred unrelated to a 'clerical event'. These latter instances can nonetheless be of value as indicating the office held by a particular clergyman at a specific date. In some instances subscription records can be very full, and in these instances you will probably have been instructed to use a different set of screens.

On activating the screen by depressing '**New Record**', the first thing to do is to check that the 'Red box' information is correctly set for the first record. Use the mouse and cursor to select from the drop-down menus or to enter the appropriate material for 'Source', 'Source Type', 'Ordinary' (where relevant) and 'Jurisdiction' following any guidance in the schedule. Ignore 'Source date' unless dealing with a register of orders. Remember you may need to alter some of this information as you proceed through the documents allocated to the database. Now enter the personal details of the clergyman who is subscribing. Enter as much information as is provided in the source (you may find there are some boxes which the source you are using never enables you to fill). Where there are drop-down menus and the item you wish to enter is not present you may need to use the 'other' option and enter the item in the 'Problem box'. You will find the cursor moves through the following sequence of boxes:

- 1) **Ev Date d/m/y:** Enter the date on which the subscription was recorded, following the guidelines in VI.2. Use the tab to move from the day to the month and the year fields in order.
- 2) **Surname:** Enter the surname, following the procedures in VI.1.
- 3) **Title:** There is a drop-down menu here. See VI.1. In the case of subscriptions for events other than ordination, you should also record if a cleric is described as 'priest' or 'deacon' in this box.
- 4) **Forename:** Follow the procedures in VI.1. For Latin forenames, see the handlist with which you are issued.
- 5) **EdQual:** There is a drop-down menu here. Enter the degree following the guidelines in VI.1 on 'Educational Qualification'. This is also where you indicate fellowships using the other procedure.
- 6) **EdColl:** Enter the name of the college from which the degree was obtained or at which the fellowship is held, following the guidelines in VI.1.
- 7) **EdUniv** There is a drop-down menu here. Enter the university attended by the cleric, following the guidelines in VI.1
- 8) **EdYear:** Enter the year in which the degree was awarded if recorded.

The cursor now moves on to enable you to record details of the subscription itself. The event type is always subscription. The cursor will now appear in

- 9) **Subscription reason:** You must click on one of three buttons. If the subscription relates to an ordination, click on '**Ordination**'. If it relates to

an institution, a collation or a licensing, click on **'Appointment'**. If it occurs on a special occasion, click on **'Others'**.

If you clicked on **'Ordination'** in 9), you should next fill in box **10)**. If you clicked on **Appointment'**, you should tab through **10** leaving it blank and next complete box **11)**. If you clicked on **'Others'**, you should tab through **10** leaving it blank unless relevant information is contained there, and complete **11-13** if there is relevant information. Otherwise move straight to **15**. The cursor itself will move with the tab key from **9** to

**10) Cler\_Status:** There is a drop-down menu here. In the case of an ordination, enter the clerical status to which the subscriber was being ordained. Otherwise only complete the box if the subscription record contains no other information about the office and location of the clergyman subscribing.

In the case of an ordination after completing 10 if there is no information about the title involved either now click on **16) Problem Description** and/or **17) Comment** if you wish to enter something there or click on **New Record** to begin entering another subscription. If the record of an ordination contains information about a title or the subscription relates to an appointment, or records the office held by a clergyman when subscribing for another reason, now enter data in

**11) Office:** There is a drop-down menu here. Enter the office to which the clergyman is being appointed or which he holds, following the guidelines in VI.3.

**12) Location\_1:** Use this box to enter the name of the parish, institution or jurisdiction following the guidelines in VI.4. Make sure you are clear which information if any needs to be entered in "Location 2".

**13) Location\_2:** Enter information (if any) that should be entered in this box following the guidelines in VI.4.

**14) Location\_3:** In certain dioceses you will asked to fill in the county here (see the relevant supplement).

You may now have completed entering all the information concerning a subscription related to an appointment, in which case either now click on **16) Problem Description** and/or **17) Comment** if you wish to enter something there or click on **New Record** to begin entering another subscription. If you entered **'Others'** when completing 9), you must still complete

**15) 'Others' Comment:** Use this box to explain the occasion of the subscription you have recorded if was not an ordination or an appointment.

Having completed box 15, you can either click on **'New Record'** to commence entering a new subscription, or tab to

**16) Problem Description** and/or

**17) Comment:** to enter any relevant material following either the guidelines on using these boxes set out in the discussion of each of the other boxes in section VI, or the overall principles set out in the section on **Key Terms**.

Having completed these boxes, click on '**New Record**' to commence entering another subscription.

## III.4 HOW TO FILL IN THE 'LIBER CLERI' SCREEN

### See example screen 4.1

The 'Liber Cleri' screen has a very specific purpose: it is to be used to enter lists of clergy holding positions at a particular date as recorded at visitations by a variety of ordinaries. You will usually be asked to enter a sequence of such lists at regular chronological intervals. We primarily intend to use such lists as a means of providing evidence of clergy holding livings in periods for which little other evidence survives. For further details, see **Section VI.8** below.

Click on '**New Record**'. On activating the screen, the first thing to do is to check that the 'Red box' information is correctly set for the first record. Use the mouse and cursor to select from the drop-down menus or to enter the appropriate material for 'Source' and 'ordinary', following any guidance in the schedule. Remember you may need to alter some of this information as you proceed through the documents allocated to the database. Where there are drop-down menus and the item you wish to enter is not present you may need to use the 'other' option and enter the item in the 'Problem box'. The cursor moves through the following sequence:

- 1) **Source:** There may be a drop-down menu here. Check the right reference is set; alter it to one of the others listed in the drop-down menu when you have completed the first document if more than one source is allocated.
- 2) **Ordinary:** There may be a drop-down menu here. Enter the name of any ordinary listed at the head of the visitation record if in the menu. Otherwise use the 'other' procedure and if what is provided is the generic title (i.e. 'Archdeacon') enter that in the Problem Box; note 'uncertain' if there is no clear indication.
- 3) **Problem Description:** Here enter any problem that afflicts the document as a whole.
- 4) **Comment:** Enter here any comment relating to all the entries or general principles apparent in the record keeping for that year which need to be noted.
- 5) **Date: dd/mm/yy:** Here enter the date of the visitation as precisely as possible, following the guidelines in VI.2. Use the tab to move from the day to the month and the year fields in order.

You are now ready to start recording the details of the clergy listed as attending the visitation. Enter as much detail as is provided

- 6) **Location\_1:** Use this box to enter the name of the parish, institution or jurisdiction following the guidelines in VI.4. Make sure you are clear which information if any needs to be entered in "Location 2".
- 7) **Location\_2:** Enter information (if any) that should be entered in this box following the guidelines in VI.4.
- 8) **Office:** There is a drop-down menu here. Enter the office which the clergyman holds, following the guidelines in VI.3 and VI.8.

- 9) Surname:** Enter the surname, following the procedures in VI.1.
- 10) Title:** There is a drop-down menu here. See VI.1. You can use the 'other' option and enter free text in the Problem Box if required.
- 11) Forename:** Follow the procedures in VI.1. For Latin forenames, see the handlist with which you are issued.
- 12) EdQual:** There is a drop-down menu here. Enter the degree following the guidelines in VI.1 on 'Educational Qualification'..

If there are any problems or comments arising from the *individual record of one clergyman or location other than those discussed in Section VI.8*, now move on to complete

**13) Comments.**

If there is nothing you wish to add, pressing the **tab** key will take you on to another line for a new location and clergyman to begin entering another location or clergyman. If you have reached the end of a visitation, and wish to move to entering the records for another year, click on **New Record**. Remember to alter the source box if you have changed sources, and to alter the date. Then proceed as before from **3**).

**A note on deletions**

You will see that you have two options for deleting text in the '*Liber Cleri*' screen, as well as the 'Undo typing' and 'Clear field' options. The '**Delete Record**' button at the top of the screen will delete the complete set of records you have entered on the screen, and you should probably avoid using this if possible. When you depress it, it will ask if you wish to delete the entire record or merely one related record. If you choose the former, all the entries on current '*Liber Cleri*' screen will be deleted; if you choose the former, only the latest line of data you have entered.

To the left of the boxes in which you enter the details of parish and clergy is another, red '**Delete**' button. Use this button to delete the contents of any one line of data relating to a single cleric or parish. When it is pressed, the computer will ask if you wish to delete this one related record. Respond yes, and the row of information will be removed.

## III.5 HOW TO USE THE 'DISPENSATION' SCREEN

### See example screen 5.1

This screen is used for entering either dispensations or related material.

On activating the screen by pressing '**New Record**', the first thing to do is to check that the 'Red box' information is correctly set for the first record. Use the mouse and cursor to select from the drop-down menus or to enter the appropriate material for 'Source', 'Source\_Type', 'Ordinary' and 'Jurisdiction' following any guidance in the schedule. The jurisdiction will almost always be the Archbishopric of Canterbury or the Archbishopric of York, and the ordinary the respective archbishop (but see **VI.9** below). Ignore 'Source date' unless dealing with a register of orders. Remember you may need to alter some of this information as you proceed through the documents allocated to the database. Now proceed to enter the date and the personal details of the clergyman who is receiving the dispensation. Enter as much information as is provided in the source (you may find there are some boxes which the source you are using never enables you to fill). Where there are drop-down menus and the item you wish to enter is not present you may need to use the 'other' option and enter the item in the 'Problem box'. Now click on the first Ev Date box. You will find the cursor moves through the following sequence of boxes:

- 1) **Ev Date d/m/y:** Enter the date on which the event occurred, following the guidelines in VI.2. Use the tab to move from the day to the month and the year fields in order.
- 2) **Surname:** Enter the surname, following the procedures in VI.1.
- 3) **Forename:** Follow the procedures in VI.1. For Latin forenames, see the handlist with which you are issued.
- 4) **EdQual:** There is a drop-down menu here. Enter the degree following the guidelines in VI.1 on 'Educational Qualification'. This is also where you indicate fellowships using the 'other' procedure.
- 5) **Title:** There is a drop-down menu here. See VI.1.
- 6) **EdUniv:** There is a drop-down menu here. Enter the university attended by the cleric, following the guidelines in VI.1.
- 7) **EdColl:** Enter the name of the college from which the degree was obtained or at which the fellowship is held, following the guidelines in VI.1.
- 8) **EdYear:** Enter the year in which the degree was awarded if recorded.

The cursor will next move on to the section of the screen concerned with the event. You first need to record details of the position the appointment to which has led to the application for a dispensation.

- 9) **Type:** This is preset to dispensation.
- 10) **Office** There is a drop-down menu here. Enter the office to which the clergyman is being appointed following the guidelines in VI.3.
- 11) **Location\_1:** Use this box to enter the name of the parish, institution or jurisdiction following the guidelines in VI.4. Make sure you are

clear which information if any needs to be entered in “Location 2”.

- 12) Location\_2:** Enter information (if any) that should be entered in this box following the guidelines in VI.4.
- 13) Location\_3:** Enter the county and diocese here.

Now click on

**22) Living Real Value** and enter this if recorded.

You now proceed to the section of the screen concerned with other livings already held by the cleric and mentioned in the application for dispensation to hold in plurality. You enter them in a section of the screen like that for a liber cleri.

- 23) Office** There is a drop-down menu here. Enter the office already held by the clergyman being appointed following the guidelines in VI.3.
- 24) Location\_1:** Use this box to enter the relevant name of the parish, institution or jurisdiction following the guidelines in VI.4. Make sure you are clear which information if any needs to be entered in “Location 2”.
- 25) Location\_2:** Enter information (if any) that should be entered in this box following the guidelines in VI.4.
- 26) Location\_3:** Enter the county in which the living stands.
- 27) Jurisdiction:** Enter the diocese or other jurisdiction.
- 28) App\_real\_Value:** Enter the real value of the living as recorded.

If other livings are held in plurality, you now proceed to enter them in the same way. When all have been entered you may click on

**14/15) Problem Description/Comment Box** and add any relevant remarks.

When all is complete, click on ‘**New Record**’.

Sometimes you may information relating to an ordination as an annotation of a dispensation record. In such a case after completing the information relating to the livings you can continue into the **Ordination** section of the screen. First enter

- 29) Date** Enter the date following the usual rules
- 30) Ordination** Indicating with the button the orders received
- 31) Jurisdiction** The diocese in which the ordination occurred
- 32) Bishop** The bishop who conducted the ordination.

You may then proceed to **14/15** if there are comments or problems, and then to New Record.

**A note on deletions**

In the area of the screen for listing existing livings to the left of the boxes in which you enter their details is another **Delete** button. Use this button to delete the contents of any one line of data relating to a living. When it is pressed, the computer will ask if you wish to delete this one related record. Respond yes, and the row of information will be removed.

## III.6 HOW TO USE THE 'REGISTER OF ORDERS' SCREENS

The nature of the source-type we define as registers of orders is significantly different from that of the other varieties we have so far considered, and the screens while closely related to those already discussed have significant differences.

Registers of orders documents represent the accumulation of clerical data collected during visitations. Like *libri cleri*, the records of clerics and their offices contained in registers of orders proceed by livings listed in alphabetical order. However, the information concerning clergy holding offices in those livings is much richer, and the software we have developed to capture this data is equipped to handle this. Usually clergy attending visitations in their livings were expected to produce details of their ordinations, appointments (i.e. the date of their institution and sometimes reasons for the vacancy prior to it) and any dispensations to hold other livings, either in or outside of the diocese, granted by their metropolitan. They might also be expected to present details of licensing, usually to preach. Accordingly we have produced a unique database for registers of orders containing a specially modified palette and a linking mechanism from which cleric details can be transported from *libri cleri* to the ordination, appointment and dispensations screens as required - in order to prevent repetitive data entry.

**NB:** Unfortunately, this linking mechanism is complex and still under development, so we have to ask you to be prepared for data *not* to carry forward and therefore to enter the information again. But in these circumstances, please still use the procedures *as if* something was carried forward as set out below rather than use new record, as otherwise an important link between the two elements of the record will not be created.

Begin by opening up the database in the usual manner. Click on **liber cleri** on the palette.

Click on '**New Record**'. On activating the screen, the first thing to do is to check that the 'Red box' information is correctly set. Use the mouse and cursor to select from the drop-down menus or to enter the appropriate material for 'Year' (actually date), 'Source' and 'Bishop' (actually ordinary), following any guidance in the schedule. In Registers of Orders this information remains the same regardless of the ordinary recorded in any of clerical events recorded in the documents the clergy presented. You are given additional boxes to record this information. If you have more than one Register of Orders allocated to the Database, however, you may need to alter some of this information as you proceed through the documents.

*Always* begin data collection using registers of orders with the **libri cleri** screen. For inputting here, follow *exactly* the same procedure outlined in **Section III.4** above. Note, however, that after the 'Comment Field' **13** used for notes on individual entries that there is a **button labelled 'C/F'**. This stands for 'carry forward'. If you click this button the cleric details data collected from that particular row should (but may not -- see **NB** above) carry forward automatically to the other screens to allow you enter details of other clerical events recorded for that clergyman., such as ordination, appointments and dispensations. If there is no such additional information, proceed to the next row as in the normal **liber cleri** screen. Otherwise, click the button.

You now need to return to the **palette** to select the next screen you will need. Let's assume you first need to go to **ordination**. Select '**ordination**' from the palette.

When the screen has appeared ( a simpler version of the main ordination screen), click the '**last entered record button**' (you will need to do this on every occasion – even the first!).

The first time you do this you will then need to type in the 'Red Box' information as instructed in the schedule and as you have already done for 'Liber cleri': Source, Source\_Type, Source\_Date, Diocese and Bishop.

We hope that all the cleric details have carried forward to this screen: if not, you will need to re-enter them. Now all you need to do is enter the ordination data, following an abbreviated version of the procedure set out in **III.2** above. Note, however, that the tab order is slightly different. Thus the personal title of the cleric is omitted between 'Ed Qual' and 'Ed Univ', and comes instead after **Ev\_Type**, itself now coming after other details of the event have been entered. '**Authorising bishop**' box **18** has been replaced by '**ord. Bishop**'. Here you should enter the name and diocese of the bishop named as responsible for the cleric's ordination, in the form 'George, Chichester'.

If further information concerning the ordination is contained in the source, such as details of bishops supplying letters dimissory, or individuals supplying letters testimonial, enter that data in the **Comment box**.

It may be the case that you have more than one ordination record pertaining to an individual cleric, such as details of his being admitted to the clerical status of both deacon and priest on separate occasions and in separate dioceses. To prevent unnecessary repetition we have installed a '**duplicate record**' **button** that you will see at the top of the screen next to the '**Info**' button. If you have a second ordination to enter for the same cleric, **click the 'duplicate record' button**. The ordination data you have collected for a cleric will then be carried forward to a fresh screen in which you can record the other event by amending the details concerning the second ordination as required.

When you have collected all the ordination data pertaining to a cleric, you will probably next want to record information relating to his appointments.

Return to the **palette** and bring up the **appointments** screen.

Click the **last entered record button**. If this is the first time you have used this screen, you will then need to type in the 'Red Box' information as instructed in the schedule and as you have already done for 'Liber cleri' and Ordination: Source, Source\_Type, Source\_Date, Jurisdiction and Ordinary.

You can now enter the details of his appointments following exactly the same procedure as in **III.1 above**. Enter each appointment recorded as a new record.

You may also encounter details of a cleric's dispensations to hold other livings. Again the cleric's details should but may not carry forward to this screen, which you can access in the usual way. Begin by clicking the **'last entered record' button**. Again, reproduce the register's details in the 'Red Box' area as you have for the other screens, following the instruction in your schedule. Now proceed to complete the boxes as set out in **III.5** above.

Once you have completed data entry for a particular cleric, **return to the libri cleri**, and continue entering the details of the next recorded cleric in the same way in the line below the one you have just completed. You will only need to click **'New Record'** on this screen if you are entering more than one register of orders. Please remember to read the note on deletions in this screen in section **III.4** above.

# KEY TERMS

The terms discussed here relate chiefly to the software and hardware with which you have been issued. Terms relating to the source material are generally defined in **Part 3**.

**‘Authority table’**: The list of possible entries contained in a ‘drop-down menu’ [qv].

**‘Box’**: An area on the ‘screen’ [qv] in which the Research Assistant is permitted to make a data entry. This may also be referred to as a ‘field’ [qv].

**‘Clerical event’**: An event in the life of a clergyman which has left a trace in the diocesan records and which may contain several elements to be entered in the database.

**‘Comment box’**: On each ‘screen’ [qv] one ‘box’ [qv] is set aside for Research Assistants to supply any additional information which might be of use to the Database project but which is not accommodated by the other boxes. In some instances you will receive guidance on what should be entered, but the box is always available for the use of the Researcher.

**‘Database’**: A copy of the FilemakerPro program set up on the computer to receive the data relating to a specified set of records. Each Research Assistant may be allocated several databases.

**‘Drop-down menu’**: For some ‘boxes’ [qv] on the entry ‘screens’ [qv] the project team will pre-programme a range of possible entries which will appear when the Research Assistant clicks on the box.

**‘Field’**: An area on the ‘screen’ [qv] in which the Research Assistant is permitted to make a data entry. This may also be referred to as a ‘field’ [qv].

**‘File’**: A database [qv] file on the hard disk of the computer or on a floppy disk.

**‘Free text’**: This refers to any entry made by a Research Assistant which does *not* use a ‘drop-down menu’ [qv] or ‘authority table’ [qv]. Most of the ‘boxes’ [qv] on the ‘screens’ [qv] will permit Research Assistants to enter ‘free text’ even where menus are available.

**‘Master Database’**: The database held on the computer at King’s College London into which all the information collected by the inputters will be transferred so that it can be accessed over the World Wide Web and the records of the various dioceses consolidated.

**‘Mouse’**: The device used to control the cursor on the screen which can be manoeuvred to position it, and with two buttons on the top, the left hand button allowing you to ‘click’ to locate the cursor for entry or to select an option.

**‘Palette’**: This term refers to the screen box in Filemaker Pro which is used both to navigate between various ‘screens’ [qv] and to exit from the program.

**‘Problem box’**: On each ‘screen’ [qv] one ‘box’ [qv] is set aside for Research Assistants to note any difficulties they have experienced in extracting information from a record and to note any damage which has destroyed any part of it. In some instances you will receive guidance on what should be entered, but the box is always available for the use of the Researcher.

**‘Screen’**: The form which will appear on the screen of the laptop computer designed to accommodate the entry of data relating to one or more type of ‘clerical event’ [qv]. There may be more than one screen available in a ‘file’ [qv].

**‘Scroll-bar’**: The bar at the right hand side of a ‘drop-down menu’ [qv], ‘box’ or ‘screen’ which can be activated by the ‘mouse’ to scroll through material part of

which may be hidden. You can either drag a marker on the scroll-bar or click and hold down on the arrows at the top and bottom of the scroll to activate the bar.

**‘Window’**: the active area of the computer screen when a programme is in use. It can usually occupy either the whole screen (when it is smaller an option made available on a button with a rectangle on it in the top right of the screen on the blue bar), be shrunk using the buttons in the top right on the blue bar to about half-size (indicated by a button with two overlapping rectangles), or indeed be ‘minimized’ to get it out of the way (indicated by a button with a single line at the bottom in the top-right of the screen on the blue bar) (‘resizing’).

## IV THE RESEARCH ASSISTANT’S COMPUTER

**T**he AHRB has funded the provision of a limited number of laptop computers to be used by Research Assistants for the inputting of data, which will be redeployed to new researchers as work comes to an end in each diocese. Laptops are expensive and fragile objects! We will have only some ten machines with which to enter the data from all the dioceses over the five years of the project, and the funding does not allow any possibility of replacing machines lost or damaged in circumstances not covered by the extended warranty made available by the manufacturers. The terms under which insurance companies are prepared to insure laptops against theft are also generally incompatible with the ways in which they will be deployed on the project.

It is therefore of the *utmost importance* that you take the greatest possible care not to risk damage to the computer with which you work. For the same reason we are doing all we can as project directors to ensure that the machines do not suffer unnecessary wear and tear from usage not associated with the project by removing from the hard disks all software which will not be needed by the Research Assistants.

With the aim of ensuring that the machines remain operative for the duration of the project, the following principles have been established to govern their use by Research Assistants. You may find that not all of them apply in your particular instance. For example, where possible we intend that the computers will be stored at the Record Office to facilitate multi-user inputting, and, where this is the case, some of the rules will not be relevant. Some of the most important are incorporated in the computer issue document which you will be asked to sign.

### IV.1 Principles governing use of project computers

- 1) **The laptop is issued for use in respect of the project alone.** Research Assistants must not load any other software or files of their own on to the machines either for leisure use or for their own scholarly researches. They should also refrain from running any software not connected with the project in either the A: drive or the CD drive. The project software is not to be used for purposes not connected with the project without the explicit permission of the Project Directors.

- 2) To avoid virus infection, **Research Assistants must not insert floppy disks of their own into the A: drive of the machine** unless they are previously unused and have not been inserted into another machine from which an infection might have been contracted. For the same reason, moreover, **the disks issued to Research Assistants by the project should not be used on any other computer.**
- 3) The databases and other software on the machine are specifically set up for the purposes of the project after extensive testing. **Research Assistants must not attempt to redesign or 'improve' the software themselves.** Any problems they identify with the design of the software must be referred to the Senior Research Officer so that they can be addressed by the Technical Director and his staff.
- 4) Wherever possible **the laptop should be run off the mains electricity** supply rather than using the battery.
- 5) Users should **avoid turning the machine on and off unnecessarily.** Whenever users intend leaving the machine for more than 15 minutes we would none the less recommend that users back up and shut down the machine. If you do not do this there is a danger that the machine will 'hibernate' and sometimes this makes it difficult to restart without using the emergency restart pinhole key.
- 6) **The computer must not be left unattended** unless adequate security precautions have been taken to ensure that it is not stolen.
- 7) The data entries should be regularly backed up on the disk provided, and **without fail** at the end of a data-entry session.
- 8) **The computer must always be transported in its proper carry-case.**
- 9) **Any technical problem with the computer must be reported to the Senior Research Officer at once.** He will then be able to implement the technical support which forms part of the manufacturer's warranty. Do not attempt to repair the computer yourself, and do not take it to a local freelance computer repair service. Any accidental damage to the computer must also be reported to the Senior Research Officer as quickly as possible.
- 10) **The computer and any associated peripherals must be returned to the Project team and their condition checked before any payment can be made to a Research Assistant for inputting.** Should any damage become apparent which is clearly down to misuse or insufficient care in the handling of the machine, **the Project reserves the right to seek to recover the cost of necessary repairs or replacement from the Research Assistant.**

As a Research Assistant, you will be given an introduction to using your computer during the Induction day. The Senior Research Officer will always be happy to answer any further queries, or to refer them to the Project Technical Officer. What follows should merely serve as an *aide-memoire*.

## IV.2 Using your computer

You may already be familiar with laptops and simply need to familiarize yourself with an unfamiliar model. Other Research Assistants will be encountering a laptop for the first time. This section is largely for their benefit. **Please note that the following guidelines apply only to the Satellite 2140CDS. Some of the computers purchased in recent months have been a more recent model, and differ in some details. If you receive a more recent machine, the SRO will brief you on its operation.**

The Toshiba Satellite 2140CDS computers which are provided by the project come with a number of peripherals (accessories). You should familiarize yourself with them before attempting to use the machine. Along with the laptop itself in its carry-case you will find:

Two lengths of cable, one permanently attached to an adapter, and the other ending in a conventional plug.

A Logitech mouse with permanently attached cable for linking to computer.

*How to set up the computer for use.*

- 1) Attach the cable with power supply adapter to the cable ending in the normal plug for the wall-socket. Then plug the computer plug into the appropriate socket on the back of the computer on its right-hand side, taking care to align the pins.
- 2) Plug in the mouse to the appropriate socket on the right-hand side of the computer (indicated by the mouse icon).
- 3) Plug the computer in to the electricity supply. The successful connection of the computer to the supply is indicated by the illumination of a small indicator light on the front right of the machine. As already indicated in the principles set out above, your machine can run on its battery in an emergency such as a power cut. But unless specifically advised by the Senior Research Officer that local conditions necessitate more general use of the batteries, please always run the machine from the mains using the adapter.

*You are now ready to turn on the computer.*

On the left hand side of the laptop you will find a rocker switch with an 'on' icon. Once you have connected the laptop to the power supply depress the switch to the right to turn the machine on. (Depressing the left hand side of the switch will turn off the machine if it is running on its battery.).

You now must wait for the computer to complete its boot-up sequence. While this is proceeding a cursor (white arrow) will appear next to an hour-glass icon. When this icon vanishes you are ready to proceed. You can use the mouse to manoeuvre the cursor arrow, and clicking its left-hand button will enable you to select commands and execute them and to position the cursor in text.

*Turning your laptop off.*

Having closed down Filemaker Pro and executed the back-up procedures, move the cursor to the 'Start' button in the bottom left of the screen and click the left hand button. From the menu which appears, select 'Shut Down'. The computer will offer you the option to shut down the computer at once, restart it or suspend it. Select the appropriate button and click 'Yes' to execute the command. When the computer has shut down, *carefully* unplug the peripherals and place the various items in the carry-case.

# V

## FILEMAKER PRO EXPLAINED

The project team have employed Filemaker Pro in developing the Research Assistants' inputting software as it is the easiest programme for those without a computing background to master. You will find that it will become very easy to use once you have got used to its internal logic. In fact the most complicated operations you will confront are probably those required to start the programme running and the procedures for backing up your data, neither of which occur within Filemaker Pro itself. The induction day should provide the opportunity to familiarise yourself with the programme, but for future reference the basics are set out below. Some of the terms use in this section are explained in '**Key terms**' above.

First of all you must start up the computer as set out in **Section IV**.

### V.1 Starting up Filemaker Pro

Having successfully started the computer up, you will see a series of icons on the screen. Using the mouse, place the cursor upon the icon for '**My Documents**'. Double-click the left-hand button on the mouse to open it. You will now see a window containing a series of icons representing the various databases allocated to your documents in the schedule given to you by the project team. Select the database on which you wish to work and again double-click the left mouse button. You will now see a list of the files in the database. Select '**CCE**' by placing the cursor on it and double-clicking once more. Shortly a box will appear requesting you to enter the password you will have been given by the Senior Research Officer during training. Enter it, taking care to use the correct case for each character and click to confirm. If you have entered the correct password, Filemaker Pro will proceed to load the database.

When loading is complete, on the left of the screen you will see a box setting out a list of options such as 'Ordination', 'Appointment', 'Subscription', 'Liber Cleri', and 'Quit'. This is known as the '**palette**'. Select the appropriate option for the first record you wish to enter by clicking on it. This will bring up the appropriate data-entry screen. At the very top of the screen you will see a series of options such as 'File', 'Edit', 'Insert', 'Format', etc. Since most of these relate to the design of the database, you can ignore most of them and will indeed be denied access by the software. The only items in this sequence that you might need to use are 'Window' and 'Help'. Immediately beneath is a 'toolbar' with a series of icons. You will not need to use these either. Further down are a series of buttons. You *will* need some of these, and their purposes are set out below. Others are purely for editorial work by the project team ('**Sort**', '**Info**', '**Reports**'). You will also see a red button labelled '**Close**'. Tempting as it may be to use this, you should *not* use this to exit from a screen, and indeed have no occasion to use it. Ignore it.

Check that the correct reference is given in the source box. Then click on the '**New Record**' button. You can now proceed to enter the first record.

### V.2 Entering a record and correcting mistakes

For details on how to proceed through each individual screen please see the relevant part of **Section III**. You can use the **'tab'** key to move from one entry box to the next on each screen, or the cursor to 'jump' either forwards or backwards in the sequence. To move backwards through the sequence of boxes/fields, use the tab while holding the **shift** key down.

In any field/box where there is a drop-down menu this will appear as soon as you move the cursor into the box. You can select an item from the menu *either* by using the mouse to activate the scroll bar at the right *or* by entering the initial letter of the word you wish to enter which will bring you to the word, or indeed by a combination of the two. (Where more than one word on the same menu begins with the same letter, swiftly typing the second letter will bring you to the correct word, but too long a delay will result in the cursor moving to a word beginning with the second letter.) You can then click on the right word. Where the item you require is not included in the menu, you should select 'other' and enter the item in the 'Comment box'.

Where a choice of buttons is offered to enter or classify an entry, simply click on the relevant button using the mouse. If there is a default setting, you can move on if it does not require alteration.

If you misspell a word in an entry and notice it while you are entering you can obviously use the **'backspace'** key or **'delete'** key to make an instant correction. As in a word-processor you can highlight text using a mouse for deletion. But there are also ways of making other deletions. There are two buttons to the top right of the entry area. Clicking on **'Undo typing'** will delete all that you have typed in the field/box so far since clicking on it or entering it using the tab key; clicking on **'Clear Field'** will empty it completely regardless of whether all its contents have been entered at the same time or instead some have been entered earlier. If you wish to undo a 'Clear Field' command, go to the menu at the top of the screen and select the 'Edit' menu and then 'Undo clear'. To undo an 'Undo typing' command, simply click on the same button once more.

When you have completed filling out a record following the guidance in Section III, you should click on the **'New Record'** button at the top of the screen. This will bring up a new blank record, or one in which a number of fields have been programmed to carry forward from a previous entry.

It is important to remember that **as soon as you press 'New Record' a new record is indeed created**. *Even if you leave it blank it will form part of the database*. It is desirable therefore that you do not leave rogue 'blank' entries. If you are in the midst of processing data, the best way to do this is so as to avoid creating rogue entries is to use **'Undo typing'** and/or **'Clear Field'** to remove what has been entered and then begin entry again, or instead to type over the erroneous matter (nb see the sections on the Liber cleri screens for the slightly more complex arrangements for deleting records on those screens). If you use the **'Delete Record'** button to remove the blank or corrupt you will not only need to confirm the action before the computer proceeds with the deletion, but you will also *not* remove the record of the entry from the CceId/Patron link in the database. Should you do this, therefore, please let Peter Yorke know when you send him the data, and avoid doing it wherever possible.

If you need to move from one screen to a different one to enter the next record, use the **'palette'** facility. If it is not visible summon up the palette using the

palette button (it may still be hidden behind the entry screen, in which case you might find it helpful to use the '**Window**' option on the menu bar at the top of the screen, selecting '**CCE**', or, if you know how, to resize the screen window). Then click on the relevant button for the screen you need. This is how you might move between, for example, 'ordination' and 'appointments' screens when entering records in a register. *Do not* be tempted to 'close' the screen you have been using before moving on: you may need it again, and you risk creating problems for yourself as well. Leave all opened until you are ready to quit the programme.

### **V.3 Navigating around the records you have already entered in the database; finding an existing record**

You may at some point wish to re-examine some or all of the records you have created. It is of course important that sorting of data entries etc., is left to the Project team to implement, but you may find a need at some point to check on the consistency of usage, or suspect that you have seen a name before and wish to see if a similar name has already been entered. If you do find a need to search for an individual record or to find as many records with a common element as possible, here is how to go about it.

On the left of the screen (although you can hide it) is an area containing a button and a **calendar icon**. If you have been entering data on the entry screen the button is labelled '**Form View**' when you are entering data on the screens. If you click on it a box will appear giving you the opportunity to view data you have collected using the screen in a list form. If you select this option the programme will display the information collected using the active screen in the current database in a tabulated form. You can scroll through the various events recorded. If you click on the 'form' icon alongside one record the entry screen for that record will be called up allowing you to review or revise it. The **calendar icon** also assists navigation between the records. If you click on its bottom leaf you will move forward sequentially to the next record entered. Clicking on the upper leaf allows you to move back.

Clicking on the '**View as List**' button while displaying an entry screen represents a different way of moving to a 'list' display of all data so far entered. When you are in list mode this button is disabled and instead a '**View as Form**' button allows you to revert to entry-screen display. When pressed this returns you to the last form being used for entry.

If you are in the list mode of display, clicking the '**Surname button**' allows you to change back and forth between a list in a sequence arranged according to the order in which events were entered and a list arranged alphabetically by the surname of the principal clergyman to whom the record relates.

If you have been scrolling through your entry screens or using the list and now want to return to the point you had reached in entering data, click on the '**Last entered record**' button. This will take you to the last 'new record' you have created. Check that all is in order and that the correct source is given in the source box, and then proceed. Note that if you have created a new record but have not yet entered any data, *it will be this blank screen to which the programme returns you* if you depress this button.

If you want to move to a particular record or to select those with a shared feature you can use the '**Find Record**' facility. If you press this button when you are

in a data entry or list screen, you will bring up a blank screen. You may now enter any element in the data for which you wish to search in the field in which you wish to search for it: a whole word, or indeed a part of a word. (Thus if you enter 'st' you will retrieve all records with words containing this sequence of letters.) As you enter material a new button will appear beneath the 'calendar' and 'view as' buttons. This is the *continue* button which allows your search to commence. Once you have entered the search item the programme will bring up any record with matching contents in the relevant field (if you use this facility in the list screen you will retrieve a list of the relevant records).

'**Find record**' can also be used to search for records by patron. To do this, click on the red triangle to the left of patron surname. A 'patron' screen will then appear (which you can also change to 'view as list'). From this point proceed as above.

## V.4 Quitting Filemaker Pro

Filemaker Pro automatically saves your data as you enter it. You can therefore quit the programme without performing a distinct 'save' action before doing so (although we require you to perform a back up *immediately after*: see below, **Section V.5**). To exit *always* summon up the 'palette' and click on 'Quit'. If the palette button is not visible it can always be accessed using the '**Window**' button on the toolbar at the top of the screen, using 'CCE'. The programme will now automatically close down, leaving you in the Windows environment. *Do not* exit using the 'Close' or 'Exit' command on the file, or, if you are an experienced Windows user, using the buttons on the bar.

## V.5 How to save your data and back up

Backing up your data is the most important and regular management operation you will need to perform. A reassuring fact is that each piece of data you enter is *automatically* saved in the database as you enter it. You can therefore quit easily without risking data loss. It is important to remember, however, that **if you exit immediately after opening a blank 'New Record' this will be saved as a data entry. You should therefore exit after completing entries for a record but before clicking on 'New Record'**.

As described in the **appendix**, you will be supplied with two floppy disks designated for each of your databases. One of these will ultimately be used to forward your data to the Senior Research Officer for integration into the main database. You are required to back up each session's data entry on both of these two disks. While you are in the process of entering the data, the two disks represent a double insurance against accidental damage which could lead to data loss (and such disasters really do happen!). Later the second can keep the data safe while the first copy is in the post. The Senior Research Officer will set up your computer so that you can back up your data with minimum effort. He will also demonstrate how to back up at the induction session. The following instructions are thus for your reference only.

Always save the back up copy on to the floppy disks provided by the project, and be careful to observe the guidelines for handling these disks set out in the principles in **Section IV** and in the **appendix**.

*Procedure for backing up.*

1. Quit File Maker pro and ensure that no other programmes are running on your machine.
2. Open up your named folder (eg 'Arthur Burns') as when first opening up Filemaker. Insert the first back-up disc into the floppy drive.
3. Using the mouse, point at the yellow folder icon indicating the folder containing the database you wish to save (e.g. 'RAB1'). Click the right-hand button on the mouse. This will bring up a 'shortcut' menu.
4. Scroll down the shortcut menu until you come to 'Add to Rab1 zip'. This is the fifth entry down. DO NOT SELECT EITHER 'ADD TO ZIP' or 'ZIP AND E-MAIL'. Click this option using the left-hand button on the mouse.
5. This will produce a zip file on the hard disk named after your database that will appear in your named folder with your CDBs.
6. Using the mouse, click the right button while pointing at the newly created zip-file to produce a new shortcut menu. Click the option 'send to' (the sixth option down). This will create a sub-menu from which you should click the first option '3 1/2 Floppy (A)' using the left button on the mouse. This will create a copy of the compressed CDB on floppy disc (provided there is one in your floppy drive!).
7. Once the CDB is saved delete the zip file you created on the hard disk: not the one saved to the floppy disk in the A: drive -otherwise problems can arise when you need to use Winzip again to back up after future work on your CDB.

ALWAYS ENSURE THE FLOPPY DISK IS REMOVED FROM YOUR LAPTOP BEFORE YOU SHUT DOWN, AND BEFORE YOU TURN THE MACHINE ON.

## **APPENDIX**

### **PROCEDURES FOR DATA RETRIEVAL AND TROUBLESHOOTING**

**W**hen you are issued with an invitation to act as a Research Assistant, it will be accompanied with a schedule specifying the documents from which we would like you to extract information for the database. The documents will be identified by record office shelfmark (sometimes including specific folio references) and a brief description of their nature, and they will be listed in the order in which we would like them to be processed.

The laptop computer, with which you will be issued or to which you will be granted access in the archive may contain separate databases for each of the documents you are processing, or, if they are small and related, a single database may be allocated to several documents. Each database name will generally be based on the record office shelfmark of the main document it will contain. This database, on the hard disk of the computer, is the one in which you should enter material while working in the record office. You will also be issued with a number of floppy disks,

each labelled with one or more filenames. These disks have two purposes. First, you should use them to make back-up copies of the files in the database which contain the data you have entered (copying them from the hard disk of your portable computer to the floppy disk) at the end of each session of work in the record office: see **Section V.5** above. Second, you should use these disks to return data to the project office.

#### *Returning data to the Project Office*

Please return completed files to the project office by sending us the 2nd floppy disk, after ensuring that you have copied the final version of the relevant data files from the hard disk onto the floppy using the Winzip process as if backing up. This should be done at the points indicated in the schedule, rather than saving up the disks for return in a single block at the end of your assignment, in order to facilitate an even flow of work in the project office.

The schedule of documents will have as its first item a relatively short document. When you have finished extracting the required information from this document, please save the file to disk and send it to the Senior Research Officer, Peter Yorke, in the envelope provided for the purpose. Please do not proceed to the next document before you have received a reply from Peter Yorke, which should normally occur within one week.

#### *Payment of Research Assistants*

The schedule you receive with the invitation to act as a Research Assistant will detail the payments for extracting information from each document. Normally, we shall ask you to complete a form requesting payment when you have completed all your research for the project. However, in the case of Research Assistants undertaking a large burden of work for the project, payment will be made in stages as the work progresses. Please allow six weeks from the date of your claim for receipt of your cheque.

At this stage we shall also send you a questionnaire about your experience of working on the project. We would be very grateful if you would take the time to complete and return this, as it will help us develop our procedures for use in other dioceses in the future.

#### *Support*

Please see the local supplement you will have been issued with detailing procedures for the particular diocese and period on which you are working. Otherwise, if you encounter any difficulties, in the first instance please contact the project's Senior Research Officer, Mrs Mary Clayton, either by telephone or email:

work telephone (Reading) 0118 3788147

Mary's email address is [m.e.clayton@reading.ac.uk](mailto:m.e.clayton@reading.ac.uk)

# VI

## REFERENCE SECTION

### VI.1 ENTERING NAMES AND PERSONAL DETAILS

#### *Surname*

Enter the surname exactly as it is spelt in the document. If you are unsure of your reading, please enter what you think is the correct reading in the 'Surname box' and make a note in the 'Problem box'. Thus, you may think that a surname probably reads 'Tanner', but might be 'Turner'. You should enter 'Tanner' as the surname and record in the 'Problem box' 'Surname may be Turner'. If a surname is illegible, for example as a result of damage, please enter "illegible" in the surname box and any characters that you can decipher in the "problem box" (e.g. 'J\*\*kins'). Where the name has actually been omitted and you have a blank space where it should have been, then please record 'unknown'.

Where the source provides two surnames for individuals, either as alternative spellings or as 'known as', please enter the first in the 'Surname box' and the second in the 'Comment box'. In some sources, particularly subscription books, individuals signed their names at the end of entries. In such cases, where the spelling of the signature and of the name as written in the main body of the record differ, please enter the signature spelling in the 'Surname box', recording the spelling from the main text in the 'Comment box'.

Where the source provides a qualifier to a person's name, e.g., 'the younger' or 'his son', it should be recorded in the 'Comment box'.

When trying to interpret handwriting, it may of course be useful to refer to entries immediately above and below a problematic entry as it might help elucidate a 'problem' letter.

#### *Titles*

Please enter any title (but *not* educational qualification) that precedes or follows the name given in the source, e.g., 'Mr', 'Dr', 'Sir', 'bart'. A drop-down menu will give common forms. If you encounter any form not on the drop-down menu, please select 'Other' and type the new form in the 'Problem Box'.

Almost invariably clergymen are described in the records as 'clerk' or 'clericus'. This title should not normally be entered in the 'Title box'. However, we *do* wish you to record the description of someone as 'clerk' or 'clericus' if it is the *only* information that identifies the person as a clergyman. We have identified three cases where this may occur: (i) schoolmasters; (ii) subscriptions, where it is unclear why the subscription is taking place; (iii) patrons who also happen to be clergymen.

Between 1540 and about 1560 some documents may record the former monastic titles of some clerics. These should be entered in the 'Title box'. The most common are 'OCfr' or 'Ordinis Carmelitarum fratrum' (Carmelites), 'OCist' or 'Ordinis Cisterciensis' (Cistercian monks), 'OSA' or 'Ordinis Sancti Augustini', 'OSB' or 'Ordinis Sancti Benedicti' (Benedictine monks), 'OP' or 'Ordinis Praedicatorum' (Dominican friars), 'OFM' or 'Ordinis Fratrum Minorum' (Franciscan friars). These forms are also included in the drop-down menu.

When processing records of institutions, you will sometimes encounter patrons who are peers or bishops. Normally their names will appear in the form

‘Thomas, duke of Newcastle’ or ‘Edmund bishop of London’. These should be entered as follows:

SURNAME = Newcastle	SURNAME = London
FORENAME = Thomas	FORENAME = Edmund
TITLE = duke of	TITLE = bishop of

The titles of peers and bishops are included in the pull-down menu. Titles of peeresses – Duchess, Marchioness, Countess, Viscountess, Lady – should be entered as free text. There are different procedures for dealing with the titles of other ecclesiastical dignitaries as patrons: please see the relevant paragraphs of **Section VI.5** below.

#### *Forename*

Enter the forename(s) as in the document. Before c.1740 many sources will give forenames in Latin. These should be transcribed in Latin. Research Assistants are provided with a list of common Latin christian names in order to help with the expansion of abbreviated forms. If you find an abbreviated form and are not sure what the expansion is, please enter the abbreviated form and make a note in the ‘Problem box’. If there is an illegible or blank entry, please follow the procedure set out for ‘Surname’ above.

#### *Educational qualification*

A drop-down menu of common qualifications is available. Please note that ‘BA’ and ‘MA’ often appear as ‘AB’ and ‘AM’ respectively, ‘BD’ as ‘B.Th.’ or ‘STB’ (‘Sanctae Theologiae Bacchilaureatus’), and ‘DD’ as ‘D.Th.’ or ‘STP’ (‘Sanctae Theologiae Professor’). In some cases you will find people who do not have degrees referred to as ‘**litteratus**’, ‘**literate**’, or ‘**lit.**’. This should also be entered in the ‘EdQual box’. Where the educational qualification is accompanied by a note of the date of the award, you should enter the year given in the ‘EdYear box’.

Sometimes you will come across references to people as fellows of Oxbridge colleges. The Latin term is ‘**socius**’. Please enter the degree in the ‘EdQual box’, and ‘Fellow of x college’ in the ‘Comment box’.. Thus, for ‘Thomas Smith, fellow of King’s College, Cambridge’, you should enter ‘fellow of King’s College, Cambridge’ in the ‘Comment box’. For ‘Thomas Smith, MA, fellow of King’s College, Cambridge’, enter ‘MA’ in the ‘EdQual box’ and fellow of King’s College, Cambridge’ in the ‘Comment box’. If you encounter any form not on the drop-down menu, please select ‘Other’ and type the new form in the ‘Problem Box’.

#### *University*

A drop-down menu allows you to select the most common universities. If you encounter any form not on the drop-down menu, please select ‘Other’ and type the new form in the ‘Problem Box’.

#### *College*

Please enter the college as it appears in the source, translating from Latin into English where possible. Please use common sense here – ‘the College of St John’, for example, should be entered simply as ‘St John’s’.

## VI.2 ENTERING DATES

Dates should be entered in the form 03/8/1745, the day, month and year being entered in their respective boxes (note the zero in the day entry for single-digit numbers).

Please do not worry about 'old style' dates or the introduction of the Gregorian calendar. Simply enter dates as they appear in the documents. Thus, '17 January 1683' should be entered '17/1/1683'.

Where part of a date is missing or illegible, please record the components that you *can* read in their proper boxes. Leave that relating to the unrecoverable element of the date blank. If there is a good reason for believing that some or all of the missing information can be supplied from elsewhere or by deduction, please explain in the 'Problem box'.

## VI.3 ENTERING 'OFFICES'

### *Definition*

For the purposes of the project, an **'office'** is defined as 'a clerical position held in relation to a living, jurisdiction, person or institution' (cathedral, gaol, workhouse, etc.). It does **not** include the **'location'**, which might be either the name of the parish, the title of the jurisdiction or the institution, or the name of a person if a chaplain. **For guidance on how to enter these various types of location, see Section VI.4.** In certain instances the entry for the office and location may involve a degree of duplication.

While variations in terminology (discussed below) should be recorded, spelling will be standardised and terms translated.

Where an individual is recorded in a single entry in a record as being appointed simultaneously to two or more offices, these must be entered separately as distinct appointments.

### *Missing, blank or illegible office*

You may encounter a record where information regarding an office is either omitted or has been lost. You should still insert the information that can be extracted from the record in the relevant boxes, and alert the Senior Research Officer to the matter using the 'Problem box'. If you know any other information that may help identify the office, please also enter it in the 'Problem box'. If you cannot decipher the office name in the source with complete confidence, please follow the procedure as set out for illegible personal names (see above, **Section VI.1** under 'Surname').

### *Parish offices/ministers of chapels*

The most common forms will be clerical offices held in relation to a parochial living: **'curate'**, **'perpetual curate'**, **'vicar'** (sometimes **'perpetual vicar'**) or **'rector'** [OFFICE] of 'Peatling Magna' [LOCATION]. Others, more or less common, which fall into the same category include **'lecturer'**, **'preacher'**, **'sequestrator'**. Ministers of proprietary chapels, etc., should be treated in the same manner: **'minister'** [OFFICE] of the 'Exeter Chapel' [LOCATION].

Experience suggests that we will encounter variations in local usage. Thus in some instances an office described in some records as a 'perpetual vicarage' is later described as a 'vicarage'. In such instances you must record the form used in the record and must not attempt to standardise it.



### *Entering personal chaplains*

In certain sources you will encounter royal chaplains, domestic chaplains of the nobility, and domestic and examining chaplains of bishops. In these cases enter as follows:

‘John Smith’ [NAME]  
‘Domestic Chaplain’ [OFFICE]  
‘Bishop of London’ [LOCATION 1]

In such cases, however, you should also enter a patron record noting the individual identity of the person making the appointment, e.g. ‘Charles James, Bishop of London’, following the normal guidelines for entering patrons, in **Section VI.5**.

### *Miscellaneous*

The project directors know from their own experience that it is highly likely that you will come across other instances in which unexpected offices are encountered, or which only appear irregularly. One example is the office of ‘**preacher**’ [OFFICE] ‘throughout the archdeaconry/diocese etc.’ [LOCATION]. Another is the case of schoolmasters. These should be recorded as ‘**schoolmaster**’ [OFFICE] of ‘Peatling Magna School’ [LOCATION]. In such instances particular care needs to be taken concerning the clerical title (if any) of the person involved (see **Section VI.1** under ‘Title’ above). You should also consult **Section VI.4** on how to enter the location element of such records. Other purely lay offices, such as doctors, surgeons, midwives, etc., must not be entered.

If in any doubt about how to enter a clerical appointment or unsure about how to divide the position into ‘office’ and ‘location’ elements, please highlight your concerns in the ‘Problem box’. You should also do this when encountering an office not in the drop-down menu and which you have not previously encountered or read about in this handbook.

### *Entering simultaneous appointment to more than one office*

In cases where an individual is appointed to more than one office (for example, a series of stipendiary curacies), or to two or more offices which are always appointed conjointly, you must nevertheless enter each appointment as a separate entry.

### *What to do if a record contains information regarding the value of an office or stipend*

You will sometimes find a note of the value of a living or the stipend attached to a curacy as part of a record: for example, many curates’ licences or subscriptions from the early nineteenth century have such information scribbled on them or record it formally. In such instances, and where there is no separate provision for value in the screen, please record the value in the ‘Comment box’.

### *What to do if the record does not record an appointment to an office but an ‘endorsement’ or permission to continue in office*

We have found in some dioceses that bishops conducting visitations clearly encountered curates *in situ* who had not as yet been licensed. Rather than dismissing them, it is clear that the bishop often chose to recognise the appointment retrospectively. Where you encounter such a record, please record it as if an appointment at the date of the endorsement, but record in the ‘Comment box’ that this was an endorsement, not a new appointment.

## **VI.4 ENTERING ‘LOCATION’**

### *Definition*

For the purposes of the project, '**location**' is defined as the name of a parish or other ecclesiastical jurisdiction in which an '**office**' is held (e.g. 'Islington, Archdeaconry of Middlesex') **or** an ecclesiastical or secular institution in which an '**office**' is held (e.g. 'Chichester Cathedral', 'Gloucester Gaol', 'Portsmouth Workhouse'). It also embraces churches which are **not** parochial churches, in which case the location element includes **both** the name of the church and the name of a parish or settlement as appropriate (e.g., 'Exeter Chapel, London'; 'St Paul's Covent Garden, St Martin-in-the Fields'). Importantly, moreover, when we are dealing with cathedrals or collegiate churches, in order to allow the entry of the 'office' element of an appointment to be readily searchable, in these instances one element of the location will be the precise title of the position to which someone has been appointed: thus 'Prebend of Peatling Magna', '3rd canonry of Rochester Cathedral'. For further discussion of the relationship of '**location**' and '**office**', see **Section VI.3** above *passim*.

An oddity comes in the case of the offices of domestic/royal chaplains, in which case the '**location**' is defined as the person to whom the person is chaplain.

### *Missing, blank or illegible location*

You may encounter a record where information regarding a location is either omitted or has been lost. You should still enter the information that can be extracted from the record in the relevant boxes, and alert the Senior Research Officer to the matter using the 'Problem box'. If you know the name of the archdeaconry, or any other information that may help identify the location if it is likely to be a parish, please use the 'Problem box'. If you cannot decipher the place name or other element in a location in the source with complete confidence, please follow the procedure as set out for illegible personal names (see above, **Section VI.1** under 'Surname').

### *Place names*

The names of parishes, churches and benefices must be entered into the 'Location box' reproducing the spelling that is found in the source.

In most cases, the place name will be simply the name of the parish, but in some cases it may be that of a dependent or proprietary chapel within a parish. Many of the names of places that you will encounter have been subject to a variety of spellings and aliases during their long histories, as you can see from the list of livings with which you will have been provided. This list contains a few variant spellings, but is not to be treated as an authoritative record of every living and every living's possible spelling and possible alias. It is also possible that you will encounter place names of livings (such as chapels etc.) that are not included in the list. You may occasionally need to refer to this list for guidance, but the spelling entered in the location box *must always* be that you find in the source. If you are not certain, enter what you think is the correct spelling and make a note in the 'Problem box'. The list also gives the archdeaconry to which the living belongs, and this should conform to any reference to the archdeaconry found in the source. If it does not, please alert the Senior Research Officer to this using the 'Problem box'.

As for aliases, if you come across, for example, 'Rumbaldswyke alias Wike Church', enter what you find in the 'Location boxes', no matter how long the

sequence of aliases you find in the source. Only use the ‘Problem box’ if you believe there is a possibility of misinterpretation.

London researchers have drawn our attention to contemporary use of Latin place names. If you are certain that you know the English location, then please enter location using your English translation and enter the Latin spelling in the comment field. Please only do this if you are one hundred per cent certain of your translation. If you encounter a location written in Latin, but do not know the vernacular equivalent, enter the Latin spelling in the respective location box(es) and draw our attention to this using the problem description box. Please remember, however, that some English place names are ‘Latinised’ – one thinks, e.g., of Bognor Regis and the many parish names that include ‘Magna’, ‘Parva’, etc. Such place names should obviously **not** be translated.

#### *Entering cathedral names and jurisdictional names*

In these instances standard forms will be used regardless of the way in which the source records them. Thus an archdeaconry’s name will be entered in one form (e.g., ‘Archdeaconry of Lewes’), as will that of a cathedral (e.g., Chichester Cathedral’). The titles of canonries, prebends, etc., however, must be entered as recorded in the source.

#### *Entering secular institutional names*

In these cases it may be harder to establish a standard form without the risk of masking important changes in the nature of institutions or indeed changes in institutions. In the case of schools, gaols etc., please therefore enter the name as you find it.

#### *Entering chaplains’ employers*

Simply enter the position of the employer in Location 1 in the generic form: e.g., ‘Bishop of London’, ‘Duke of Newcastle’, but enter the specific individual involved in the ‘patron’ section of the screen, following the procedures in **Section VI.5**.

#### *How to break down the components of ‘Location’ to enter in the ‘Location boxes’:*

##### *I ) parishes and chapelries*

Most locations that you will encounter will be simple in form: the place names of parishes. In these cases, enter the place name in ‘Location 1’. This applies even where the parish name has more than one element, e.g. ‘St Peter’s, Chichester’, or an alias. Do not enter anything in ‘Location 2’ or ‘3’ in such instances. When dealing with a chapel within a parish and not the parish church (this will normally be clearly apparent in the source) enter the parish name in ‘Location 1’ and the name of the chapel in ‘Location 2’. For example:

‘Islington’ (parish) [LOCATION 1]  
‘Angel Road chapel’ [LOCATION 2]

#### *How to break down the components of ‘Location’ to enter in the ‘Location boxes’:*

##### *II ) Cathedral and other offices in ecclesiastical institutions*

In these instances enter the name of the institution in ‘Location 1’ and the *full* title of the office in ‘Location 2’: e.g.

‘Chichester Cathedral’ [LOCATION 1]    ‘Chester Cathedral’ [LOCATION 1]

'Prebend of Pest Magna' [LOCATION 2] '3rd Canonry' [LOCATION 2]

This may involve an element of duplication with the entry of the office.

*How to break down the components of 'Location' to enter in the 'Location boxes':*

*III) 'Secular' institutions*

Enter the name of the institution in 'Location 1' and leave 'Location 2/3' blank: e.g.:

'Chichester City School' 'Chester Workhouse' [LOCATION 1]

*Location in the Master Database*

It may be of some assistance to know how what you enter in the Location boxes relates to what will be found in the final public version of the Master Database (MDB). The information in 'Location 1' and 'Location 2' will be loaded directly into the MDB in the form in which you enter it. However, all place names will be linked to a 'definitive' list of parish names compiled from other sources, such as the Royal Historical Society volume of local administrative units and Richards' volume for Wales. Thus, it will be possible to search the MDB for a parish using either the 'definitive' spelling or any of the alternative spellings of that parish name that have been entered by RAs. The information about county (or archdeaconry, etc.) that you are sometimes asked to enter in 'Location 3' will not be loaded into the MDB. Rather, it will be used at the Project Office to ensure that, in cases of doubt, we have identified the parish correctly – e.g., that we are linking a record relating to Bury to the correct Bury.

## **VI.5 ENTERING INFORMATION CONCERNING PATRONS**

Patrons may be either a named individual, a group of named individuals, an individual presenting in virtue of his office (for example a bishop, dean, vicar, or indeed the king), or a corporation or institution (for example, 'the dean and chapter of Chester', trustees etc.). Sometimes patronage is exercised on someone else's behalf, notably where a minor's patronage is exercised by a guardian, or the 'real' patron is a Roman Catholic or a lunatic. This is also the section of the screen in which information is entered about electors, and incumbents nominating curates to their livings. Some care therefore needs to be exercised to ensure that information is entered appropriately in the boxes. In order to facilitate searches of the database and to simplify data entry, in a few instances we have allocated equivalent elements of the titles and names of patrons to different boxes depending on the type of patron involved. The general instructions that follow must therefore be read in conjunction with the more specific instructions relating to different categories of patron.

*Patron type*

The Database will enable researchers to examine the changing profile of the distribution of patronage in the Church of England. You will therefore find a drop-down menu in the 'Pat\_Type' box, which offers you several options for the classification of the patronage exercised in an event. If the patron is a single lay individual or a group of named lay people enter 'Lay'; if the patron is the monarch, the Prince of Wales, the Lord Chancellor, the Chancellor of the Duchy of Lancaster or the Lord Keeper enter 'Crown'; if it is a bishop or archbishop acting in virtue of his

office enter 'Episcopal'; if it is a dean and chapter acting collectively, or a dean, canon, prebendary or parochial clergyman acting in virtue of his office enter 'Ecclesiastical Corporation'; if a sole clergyman, be he bishop or curate, presenting in his own right enter 'Clerical' (even if merely an incumbent appointing a curate to his own living); if it is a lay body, for example a Mayor and Corporation or named body of trustees enter 'Lay Corporation'; if it is a college or the master and fellowship of a college enter 'Univ. Collegiate'; if it is the 'parishioners/inhabitants', or another unincorporated group of laity, enter 'lay'. Where the record indicates that more than one of these patron types is involved enter 'Mixed'. You *must* enter one of the list provided, or leave the box blank if no patron is named. If for any reason you are uncertain about how to classify the patronage, contact the Senior Research Officer.

#### *Distinguishing different types of clerical patron*

As you will gather from the preceding paragraph, it is hoped to distinguish between clergy presenting in right of their office (which in the Database we will designate 'Ecclesiastical Corporations') and those who do so in virtue of private patronage belonging to them personally. We suspect this may be more easily said than done! It is clear that over time conventions regarding the recording of patrons changed, and that there was considerable regional variation. We do not think that there is likely to be a foolproof and universally applicable set of rules that will instantly allow us to distinguish one from the other. Two factors which may alleviate the problem this might appear to pose are a) that we do not think that there will be too many instances of higher clergy presenting to family livings in the dioceses in which they hold office and b) that a failure to clearly record the fact that a presentation was made in right of private patronage might have created a danger that a successor to the office might have claimed the right to present. We anticipate in consequence that in many instances it will be apparent from the source when a clergyman from the bishop down is presenting in right of private patronage. Where this is the case, you should be able to make the correct entry in 'Patron Type' with confidence. In other instances, we ask you to follow the following guidelines, which we anticipate will generally yield the more likely option:

1) Where an archbishop, bishop, dean, canon or prebendary is recorded as making a presentation, treat it as a presentation in virtue of the office, and record it as 'Episcopal' or 'Ecclesiastical Corporation' as appropriate, unless it is clear from the document that this is not the case;

2) Where a parochial clergyman is recorded as making a presentation to another parochial living, treat it as an example of private patronage unless it is clear from the document that this is not the case, and record it as 'Clerical';

3) Where a parochial clergyman is presenting to a parochial chapel, within his own parish, treat this as a presentation in virtue of the office, and record it as 'Ecclesiastical Corporation'.

We recognise that this rough and ready strategy may not always result in Research Assistants making correct entries, but we can reassure you that when the Project Directors and Senior Research Officer process the entries they will seek to make corrections as appropriate so that there will be as few errors as possible in the master database.

#### *Patron role*

Records of appointments in episcopal registers and similar sources generally include a statement of the role in which the patron is acting. In most cases this is a statement that the presentation is being made by the legal owner of the advowson, and the presentation is recorded as '*pleno jure*', 'in full right', '*verum et indubitatum patronum*', 'true and undoubted patron', '*verum, ut dicitur, pleno jure*', or some similar phrase. In all such cases please record the 'Pat\_role' as 'own right'. In some instances, however, such as a lapsed presentation, sequestration, or an archiepiscopal option, the normal patronage arrangements for a position are interrupted and the patronage exercised on a one-off basis by a different patron. Such instances are usually very clearly identified in the records, as the 'real' patron would be anxious to protect his rights. Please use the 'Pat\_role' box to identify instances of 'options', 'lapses', etc. Please also take care to read the relevant section of the record carefully – 'true patron by lapse' and 'true patron for this turn' are, of course, examples of patronage being exercised by lapse and for this turn respectively. Do not use the 'Pat\_role' box to identify instances where patronage is being exercised by a guardian or proxy (see below, *Guardians and other proxies*). Please note that where there is no direct evidence in the source relating to the role exercised by the patron in any one instance, this box should be left blank.

This box is also important when dealing with incumbents appointing assistant or stipendiary curates in their own livings, in which case 'nominator' should be entered, or in the case of elections to lectureships etc., in which case 'elector(s)' should be entered.

Where a bishop is appointing someone to administer a sequestered living, his role should be recorded as 'sequestration'.

#### *Patron gender*

One important issue that the Database hopes to address is the extent to which women played a role in the exercise of patronage in the Church of England. We are therefore collecting information about the gender of patrons in two ways. We want to establish the gender profile of each act of patronage, and also to collect information that will allow searchers to identify individual women active in patronage. Use the 'Gender' buttons when entering information about each individual involved in an act of patronage to indicate if they are male or female.. The 'Pat\_Gender' buttons allows you to report the overall gender profile of the body of patrons involved in each act. Where both men and women are involved, enter 'mixed'. Corporate patronage can be assumed to be male unless there is explicit evidence to the contrary.

#### *Personal names, titles, forenames*

When entering the personal name or title of a patron, please follow the guidelines for spelling etc. set out in Section VI.1 above. In the case of incumbent clergy nominating assistant/stipendiary curates, do not enter 'Rector' etc as title, or 'Reverend': leave it blank.

#### *Patron residence and office*

Most records concerning patrons record their place of residence or, in the case of individual clergy exercising patronage, their living. Use the 'Residence/ Office' box to record whatever information falls into this category: thus in this instance place and office are entered in the same box. Possible entries could thus be 'Hambleton Hall, Devon', or 'Rector of Lewes'. Where county information is given for lay residences

record it; also if a clerical patron's address is extra-diocesan. For guidelines on spelling place names, see VI.4 under '*Place names*' above. We don't anticipate that the residence section will be used independently of the patron's name for searching the finished database, so where entering here would add nothing to the information contained under name, leave 'Res\_Office' blank. For example, leave it blank for episcopal, royal, collegiate and collective chapter or secular corporate patronage.

#### *How to enter crown patronage*

If the patron is 'His Majesty King George', enter 'George' under SURNAME, and 'King' as TITLE. Leave FORENAME blank. Other examples:

'Frederick' [SURNAME]

'Prince of Wales' [TITLE]

'Chancellor of the Duchy of Lancaster' [SURNAME]

'Lord Chancellor' [SURNAME]

In these two last instances, if a personal name is given, enter it in the 'Comment box'.

#### *How to enter episcopal or archiepiscopal patronage*

If the patron is 'William, Bishop of Chichester', acting either in virtue of his office or private patronage, enter 'Chichester' as SURNAME, 'William' as FORENAME, and 'Bishop of' as TITLE. Ensure that the patronage is correctly classified, however.

#### *How to enter collective chapter patronage*

If the patron is 'the Dean and Chapter of Chichester Cathedral', enter 'Chichester, Dean and Chapter' under SURNAME. Leave TITLE and FORENAME blank.

#### *How to enter individual clerical patronage whether in virtue of office or private patronage*

These are entered in an identical manner: the distinction is preserved by the way the patronage is classified in the "Patron Type" box (see above, *Distinguishing different types of clerical patron*). If the patron presenting in virtue of his office or as a private individual is 'William Ashburnham, Dean of Chichester', enter 'Ashburnham' in SURNAME, 'William' in FORENAME, and 'Dean of Chichester' in RESIDENCE/OFFICE. Similarly, for a prebendary, enter 'Chichester Cathedral, prebendary of X' in RESIDENCE/OFFICE.

If you find that the record of a clerical patron records his degree, enter this as the first item in RESIDENCE/OFFICE along with the other information, e.g. 'BA, rector of Littlehampton, Sussex'.

#### *How to enter corporate lay patronage*

If the patron is the 'Mayor and Corporation of Lewes', or 'Mayor and Jurats of Rye', enter 'Lewes, Mayor and Corporation' or 'Rye, Mayor and Jurats' under SURNAME. Leave TITLE and FORENAME blank.

#### *How to enter collegiate patronage*

If the patron is ‘the Master and Fellows of the College of St John, Cambridge’, or ‘John Smith, Master of Balliol and the Fellows of Balliol’ enter ‘St John’s, Cambridge’ or ‘Balliol, Oxford’ under SURNAME. Leave TITLE and FORENAME blank. Please translate, and use common sense here – ‘the College of St John’, for example, should be entered simply as ‘St John’s’.

#### *How to enter ‘multiple’ patrons*

Many acts of patronage involve several patrons, or a combination of real patrons who for some reason cannot exercise their patronage and those exercising it as their proxy. For the latter see the next section. In the case of simple combinations of named individuals, simply enter each patron’s information on a new line. The screen will allow you to enter as many patrons as you wish. Where the patrons are not named, but are an unincorporated group of laity, such a parishioners or inhabitants, enter it here but make sure that if it is the ‘parish of Willesden’s inhabitants, do not just enter ‘parish of Willesden’ but also include ‘inhabitants/parishioners’.

#### *How to enter guardians and proxies*

Where it is clear from the record that the patronage is actually being exercised by one individual on behalf of another who for some reason is debarred from making the presentation, for example because they are a minor, a Roman Catholic or a lunatic, we would like you to record both the ‘proxy’ patron and the ‘true’ patron following the normal rules. You should then indicate which is which by using the button, clicking TP to indicate the ‘real patron’ and G to indicate the ‘guardian’ or other proxy. Where a presentation does not involve a proxy, leave this button alone.

## **VI.6 ENTERING ORDINATIONS**

Most aspects of entering an ordination are straightforward, and are dealt with when we discuss the ordination screen in **Section III**. There are two points that should be made here, however.

#### *Entering the place of ordination*

We have established two boxes that will accept information relating to the place of ordination, which may be recorded in some of the sources dealing with such events, for example, bishops’ registers. The ‘Ev\_Place’ box is available to record the location of the event. This could be a town or city: for example, London, or the cathedral city. But it could equally be the location of the bishop’s palace. The box labelled ‘Ev\_Church’ is available to record the church in which the ordination occurred: for example, ‘Chichester Cathedral’, ‘St George’s Hanover Square’. In the case of an ordination in an episcopal (or other) palace, the entry in ‘Ev\_Church’ would be ‘chapel’.

#### *Entering ordinations involving the use of letters dimissory*

In some instances bishops arranged to have clergy ordained on their behalf by one of their colleagues through the issue of ‘letters dimissory’. Such instances are usually clearly indicated in the sources relating to the diocese of the bishop who actually carried out the ordination. When you encounter such a case, please indicate this by

clicking on the 'Letters dimissory' button and then filling out the box beneath it, entering the name and diocese of the bishop issuing the letters as given in the source in 'Authorising - Bishop'. In the case of the *issue* of letters dimissory as recorded in the diocese of the bishop on whose behalf the ordination is carried out, you must alter the 'Event\_Type' accordingly, and record the name of the bishop to whom they are issued if noted in the 'Comment Box'. In some cases the date of the actual ordination is recorded in the margin, and this should be recorded when available in the 'Comment Box'.

#### *Recording the title to an ordination*

In some cases the name of the position on which the candidate applied for his orders is recorded. Follow the instructions in **Section III** on where to record this in the relevant screens.

#### *Abortive ordinations*

Sometimes candidates got cold feet; sometimes they had a 'stag night' of which the bishop disapproved. This is worth knowing, so if you encounter an abortive ordination, use 'Event\_Type' to record the fact and fill out the details: any juicy titbits can go in the 'Comment Box'! Any caveats or other information warning against the ordination of a candidate, either as deacon or priest, should also be entered. The event should be entered on the Ordination screen as 'Candidate for ordination', and the Comment box should be annotated as necessary with additional explanatory information.

## **VI.7 ENTERING SUBSCRIPTIONS**

As in the case of ordinations, there is little to add to the guidelines already laid out in Section VI that is specific to the entry of data concerning subscriptions. It should be noted, however, that although there is a designated screen for subscriptions, this is intended for use where the information contained in a document relates only to the act of subscription. In some other instances a subscription book may serve as a *de facto* episcopal register and contain as much information concerning events such as institutions as records relating specifically to the institution itself. In these cases you may be instructed to use another screen, such as the 'appointment' or 'ordination' screen, to record information.

## **VI.8 ENTERING VISITATION RECORDS FROM LIBER CLERI**

The entry of visitation records is actually one of the most straightforward operations involving a screen, and you are referred to **Section III.4** for detailed guidance. But a few general points should be made.

#### *What to do if there is a blank record*

Often the source for a liber cleri is a visitation book with the places and offices filled in already leaving a space for the name of a clergyman showing up at the visitation.

Where no name has been entered, this may be a vital clue to the fact that at the date of the visitation a living was vacant. It is therefore important that you record the fact by entering the location (and if recorded the office) and entering 'Blank' in the 'Comments' box at the end of the row.

#### *Multiple offices in a parish*

Where a parish has more than one cleric associated with it, say a rector and a curate, enter each on a separate line, recording full details of location for each.

#### *Sequestrators*

You may encounter records of sequestrations in these documents. Where you are certain of the status of the cleric, or he is recorded as a sequestrator, enter him as such in the 'Office' box. In some cases there may simply be an 's' in the document. Although this almost certainly indicates a sequestrator, only enter 'S' in office in these circumstances, but draw attention to the situation by entering 'Sequestrator?' in the 'Comments' box at the end of the row.

## **VI.9: ENTERING RECORDS OF DISPENSATIONS**

These records will rarely be encountered save in the context of Registers of Orders, or in the records of the Archbishops who issued dispensations. We will, however, occasionally use this screen to recover other related material that has a similar format. The screen is fairly self explanatory: the three points to look out for which are potentially capable of generating error are:

### *1) Entering value*

We are interested only in the *real* value, not that in the King's Books. If both are recorded, make sure you note the correct one.

### *2) Which living to enter where*

The 'main' entry relates to the living to which the cleric is being appointed when he applies for dispensation to hold livings in plurality; livings already held are entered in the list below which takes a form similar to that of the Liber Cleri screen. The distinction is important, for we cannot know for certain that the appointment prompting the dispensation was actually carried out from this record.

### *3) Dioceses*

Remember, there is no reason that all the livings will be in the same jurisdiction. Make sure you enter them correctly.

We think not impossible that you will encounter records of dispensations that appear to have been granted by other authorities than the two archbishops. If this is the case, please highlight this in the 'Comment Box.'

## **VI.10: ENTERING RECORDS FROM REGISTERS OF ORDERS**

Again, the screen walk-through in **Section III** is fairly self-explanatory. All the screens required are minor modifications of the standard screens. But it is worth remembering *why* they are different. Registers of orders record events at second hand: we therefore want to know when the records were created. This is why the ‘Red Box’ information in the screens here always relates to the visitation at which the records were created rather than the information on the documents the clergyman provided for inspection. Make sure you remember what goes where.