

## **GenSmarts: A Mini Review**

by  
Beverly Levine Smallwood  
Page 2

## **Determining Future Research Tasks**

by  
Beverly Levine Smallwood  
Page 4

## **In The Electronic Section**

### **Using The Master Genealogist to Manage Future Research**

by  
Beverly Levine Smallwood  
Page 8

### **Using PDF Documents to Their Fullest**

by  
Anne Jacobs  
Page 10

**August 16, 2003**

## **Using Bygones For Your Research**

**Presented by Beverly Levine Smallwood**



ByGones is an electronic research log and note-taking system. If your research logs have buried you (or you never started a research log), this may be your answer. Research logs prevent us from redoing the same research, but on paper they can become unwieldy. This free style software package will help you keep track of your research AND gives you the power of the computer to find your notes instantly.

**September 20, 2003**

### **Find That Book Using Librarian Resources (WorldCat)**

**by Tony Kierna**

There are many resources available on the Internet. Tony will demonstrate a number of resources you may not be aware of, like OCLC, WorldCat and NSLS Liaison.

**October 18, 2003**

### **Boolean Logic, Made Easy**

**by Ginny Jenkins**

Have you tried to search for something on the Internet and been buried by too much data? Boolean logic can help tame this avalanche of data by filtering your search results down to a manageable size.

## GenSmarts: A Mini Review *by Beverly Levine Smallwood*

As I was outlining my articles for research tasks and TMG research logs, the August 1<sup>st</sup> issue of UpFront with NGS arrived by email. In it was a news release for a software product that seemed uncannily timed. "A new type of genealogy software called GenSmarts uses artificial intelligence to make research suggestions." Well, as I was describing how to do this using one's own intelligence, I thought I'd check out what artificial intelligence was doing these days.

I went to the web site <<http://www.gensmarts.com/>> and downloaded a demo version. Though not stated up front, it imports your data from either GEDCOM format or directly from Family Tree Maker or Legacy file formats. Once imported, you are encouraged to select a root individual. If you are searching both your and your spouse's family lines, selecting one of your children will accomplish this. This marks the people you would be most interested in: direct ancestors.

The program then compares all the people, places and dates to its database of sources to come up with suggestions of things you should check and why. Some of them are good; others not so much. There were suggestions not made, and that can be improved as the source database grows.

For each suggestion, you may update the status by clicking on Found, Not Found, Plan to Search, or Clear (your previous selection). There is no button for "not applicable" which seems more relevant than Not Found which would indicate that a search was made. You may limit the list of suggestions from everyone to just your ancestors. You may sort it by surname, date, or research priority. According to the help files, the research priority is determined by a combination of factors including whether it would provide missing data, whether the person is an ancestor, and whether the source includes a significant portion of the population, thus increasing the chances of finding the person.

You may also limit the list to specific status markings (Plan to Search, etc.) or

to free online databases or to both subscription & free online databases. It also allows you to limit the search suggestions to specific websites or libraries. If the source is online, a single click will open your browser and perform the search.

Each research suggestion contains a detailed analysis of why you should look in that record. It includes soundex codes and alternate surname spellings. In the case of census, it details the names and ages of those who might be found in the household.

Since it didn't read my list of sources, it suggested all kinds of records that I'd



**"GenSmarts uses artificial intelligence to make research suggestions."**

already searched and sourced. I can certainly understand why, and don't see a way around it, but it certainly increased the clutter.

The source database is geared towards U.S. sources only at this point and it doesn't deal well with international characters. My suggestion is to exclude anyone who never lived in the U.S. from your GEDCOM file. This is best done from your genealogy program in most cases.

To use GenSmarts you would need to be constantly creating new GEDCOM exports as you add new people. I am unclear as to how GenSmarts refreshes without making you start over, but there is a menu selection for refresh/reopen. Some features were limited or disabled in the trial version, like cut and paste. It has several options for printing To Do lists.

Here are a couple of examples where the software fumbled. My Schmidt/Smith family lived in Chicago at all times. The daughter ran off to the marriage mills in Crown Point, Indiana, in 1937 to get married. Because of this one-time sojourn into Indiana, GenSmarts suggested looking for this family in the 1919 and 1931 Indiana States census returns.

My ancestor Björn Swansson has no birth or death dates. His children were born between 1679 and 1694 in Värö, Halland, Sweden. His wife died there in 1728. GenSmarts suggested looking for him in the 1880, 1900, 1910, and 1920 censuses of Arkansas. It read Värö as V ar o, and decided that AR was Arkansas. Since he had no death date, he must still be alive. It estimated a birth date for him of 1656 and told me he'd be 244 years old on the 1900 census. It offered me several alternate spellings for Swansson, but neglected the obvious Svenson.

All that said, I see great potential for this software. One thing that I've never seen any software do is to take each person and compare them to a check list of sources. This is the closest I've seen to that concept. Imagine if the Family History Library Catalog was reinterpreted into a source database into which you could upload your GEDCOM file and receive a list of films, fiche, and books you should look at. That could really change the way we use library catalogs and the time spent going through them.

The software could be quite an excellent addition to your resources, particularly if you are new to genealogy. However, the user must be aware of its limitations and temper artificial intelligence with common sense in some circumstances. Keep in mind that if a source isn't in the database, it won't be offered as a suggestion. You must not rely solely on a piece of software to tell you how and what to research.

GenSmarts sells for \$24.95 and runs on Windows 95, 98, ME, NT, 2000, and XP, requiring at least 32MB of memory and a processor speed of at least 150MHz. The website has some screen shots as well as the trial version which you may download. The company seems to solicit user input as to the direction and content of the product.

The program's author is about to release a beta version to address some of the date estimating problems. He seems very responsive to suggestions and may present a demonstration for us next year.

## President's Letter

---

The end of summer fast approaches. I hope you had some opportunities to get out and walk a cemetery or meet up with some cousins. Far too much of genealogical research is spent in a library or in front of a computer. Don't you agree?

We received our fund raising check from Jewel for the pre-Independence day shopping days. We did better than we have in a long, long time, but not the \$100 goal I suggested. Was the increase in participation due to the bribe or the timing? We have another Jewel Shop and Share coming up August 25<sup>th</sup> through 27<sup>th</sup>. It's just before Labor Day for those of you needing to stock up on picnic supplies. The same offer applies to this one. If we are able to earn \$100 or more, we will buy a new video or two for our member's library. So shop and encourage your friends, neighbors, and family to shop on one of those days, and remember to turn in the coupon at the check out. The coupons will be available at our next meeting as well as on our web site. Just please remember that we are not to distribute the coupons in or near Jewel Food Stores.

I've received a couple of responses to my call for project volunteers last month. I'll be getting together with these kind people to discuss specifics. Thank you *June Buller* and *Christine Clark* for answering the call. I understand that *Harve Mankopf* also has some ideas on the newsletter indexing project. I look forward to hearing from him as well.

This month I'll be demonstrating Bygones again. I haven't heard from anyone about any specific features they'd like demonstrated, so it will be a general demonstration. Hopefully, some of you who have been using Bygones can offer some tips of how you use it or will bring questions. It is truly one of my favorite pieces of software, after The Master Genealogist.

Next month will be *Tony Kierna's* demonstration of library and librarian resources. In October *Virginia Jenkins* will show us how to limit searches and zero in on what we're really looking for. We end the program year with *Peg O'Neil's* demonstration on using video and DVD to tell your family story.

I hope you've been thinking about what topics you'd like to see next year for our annual survey. In order for an idea to get more than one vote, it needs to be on the survey. Otherwise, write in suggestions, while good, are of unknown desirability. Surveys should be distributed at the October meeting, so please get your requests in soon.

Please consider also whether you would be willing to serve as an officer, on a committee, or work on creating the slate of candidates for next year. Do you have a really great idea for a newsletter article or web site feature? We'd like to hear from you. As always, CAGG-NI is no more and no less than what members make it.

*Beverly Levine Smallwood*

## Jewel Shop and Share

---

August 25-27, 2003

Our fundraising event will begin on Monday, August 25<sup>th</sup>, ending August 27<sup>th</sup>. You may help CAGG-NI by shop on any of these days. After shopping, turn in one of the CAGG-NI coupons to the cashier. The store number and the amount you spent will be added to the coupon. CAGG-NI will receive 5% of all the purchases made on its behalf. Coupons will be available at our web page <http://www.rootsweb.com/~ilcaggn/fundraising/JewelOsco.html> and will be available at both the TMG and CAGG-NI meetings.



## Officers

---

President	<b>Beverly Levine Smallwood</b> <a href="mailto:caggn_bev@yahoo.com">caggn_bev@yahoo.com</a>
VP/Program Director	<b>Henry (Chip) Douglas</b> <a href="mailto:CDouglas1@ameritech.net">CDouglas1@ameritech.net</a>
Financial	<b>Garth Conley</b> <a href="mailto:G.Conley@Prodigy.net">G.Conley@Prodigy.net</a>
Secretary	<b>Marilyn Alton</b> <a href="mailto:MAAlton735@aol.com">MAAlton735@aol.com</a>
Membership	<b>Larry Olson</b> <a href="mailto:LOlson@mountprospect.com">LOlson@mountprospect.com</a>
Promotion	<b>Dan Wertz</b> <a href="mailto:DWertz@comcast.net">DWertz@comcast.net</a>
Publicity	<b>Rick Sommer</b> <a href="mailto:RESommer@aol.com">RESommer@aol.com</a>
Ways & Means	<b>Anne Jacobs</b>
Newsletter Editor	<b>Jim Cottrell</b> <a href="mailto:JimboDeuce@Yahoo.com">JimboDeuce@Yahoo.com</a>
Webmaster	<b>Gerry Czadowski</b> <a href="mailto:GerryCzadowski@Covad.net">GerryCzadowski@Covad.net</a>
Librarian	<b>Otto Knapp</b> <a href="mailto:OKnapp@Juno.com">OKnapp@Juno.com</a>
Historian	<b>Christine Clark</b>

## Determining Future Research Tasks *by Beverly Levine Smallwood*

I talk a good deal about maintaining a list of future research tasks or a To Do List. You may find an article about using TMG to manage research tasks elsewhere in this issue, but how exactly do you come up with the tasks? I compare my knowledge of available sources to the person's lifetime or to a particular event.

Start by making a timeline of the subject's life. Include the date, place and a description of the event on each line in tabular form. Be sure to include the births and deaths of each of the children or spouses as these too can help point to where the subject person was at a particular time. To be absolute, we only know that the mother was there while the child was being born. The father was only absolutely present for the conception and could have been anywhere when the child was born. However, it is usual that the family unit remained together most of the time. Looking at the timeline or lifeline, you should now be able to see points of immigration or migration. For example, the subject was born in England in 1799. His first child was born in England in October 1831, the second child was born in New Jersey in January of 1833, the third child was born in Massachusetts in 1834 or 1835, the fourth and all subsequent children were born in Rensselaer County, New York starting in 1838. From this we can determine that husband, wife and first born immigrated from England to New Jersey between October 1831 and January 1833. Soon after they went to Massachusetts, perhaps only stopping long enough to give birth. The family then set down roots in New York between 1834/5 and 1838.

Now, compare the timeline to a timeline of sources. I do this in my head, but you may choose to write up a list of sources in a timeline format. Let's start with the federal census. This man died in 1881. Based on the information above, I should be able to locate him in the 1840, 1850, 1860, 1870, and 1880 censuses of New York. He would not have been in the U.S. in time for the 1830 census. Additionally, New York took state cen-

suses so I should also look for 1835 (possibly though they might have still been in Massachusetts), 1845, 1855, 1865, and 1875. Vital records, birth/marriage/death should also be examined. His birth and marriage took place somewhere in England, so English sources will have to be examined. Since national registration began in 1837, I would need to know the parish in order to find church records. His death took place in New York in 1881. My research of New York sources indicates that this is when vital records began, so it is *possible* that his death was recorded though typically adherence to new rules has always been spotty.

Now, look at each life event and ask yourself what records might have been created and where they might be. Are there ship's lists for this time period? Were birth announcements typically recorded in the local paper? Was there a local paper? What about school records? Did he or any of his older sons participate in the Civil War? Did he naturalize? Did he vote? Did he own land? Did he pay taxes? Where was he buried? Was there an obituary? Could funeral home records exist? Was there a will or probate records?

These are all general questions. To make them into more specific research tasks, you must research the place and time. Get a book about New York research. Read the Family History Library's Research Guide for New York.\* Read the relevant parts of the **Redbook: American State, County & Town Sources**. Try to locate similar guides for the county and town if possible. Read a county history. Examine the Family History Library Catalog for New York, for Rensselaer County, New York, and for the town of Sandlake, Rensselaer County,

New York (where he was found on the census returns). Examine other library catalogs for the same levels of locality. Look for state, county and town websites, archives, historical societies and genealogical societies. Check in PERSI (Periodical Source Index). Look in NUCMC (National Union Catalog of Manuscript Collections, pronounced NuckMuck) for unpublished and obscure sources. Do a Google search for the place. Search the IGI (International Genealogical Index on FamilySearch) and other such databases to get clues of what other sources to consult. An index is not a source; it was created to lead you to the source.

After examining all these sources, you should have some more specific ideas about what records might have been created and where they might be. Add any place-specific events to your timeline like an earthquake or flood. The newspaper may have extensive reporting, lists of the dead and injured, an inventory of property damage, and human interest stories. The Red Cross may have created disaster relief records. Any source that you haven't examined goes on your To Do list. Be sure to include where this source might be found and any information about finding aids or indexes.

I tick off a mental list of source timelines, but you might find it helpful to create some for yourself on paper. Include the state and federal census dates, when vital records were first gathered, all military actions and drafts, newspaper publication dates, available online indexes, etc. Keep in mind that anyone who died after 1937 might have had a social security number, but you are not likely to find her/him on the index unless s/he died mid 1960s or later.

A To Do List can be as simple as "look for their marriage" or "marriage between 1828 and 1830 in England" or as specific as look on this roll of film, or in that book. The more you learn about the place, time, sources and finding aids, the more specific you can make your re-

**Continued on page 6**

## Other Group Events *compiled by Beverly Levine Smallwood*

---

23 AUG 2003 - 2PM

**Genealogy and Personal Digital Assistants**  
North Suburban Genealogical Society  
<http://www.wpld.alibrary.com/nsgs.htm>

12 AUG 2003 - 7 PM

CAGG-NI MEMBER BEVERLY LEVINE SMALLWOOD  
**Modern Census Returns-Getting Them and  
Getting Everything Out of Them**  
Lake County Genealogical Society  
<http://www.rootsweb.com/~illcgs/lcigs/meetings.htm>

12 AUG 2003 - 7 PM

MARIAN RICHTER SCHUETZ  
**The Ellis Island Experience**  
Schaumburg Township District Library  
Genealogy Group

14 AUG 2003 - 7 PM

ED URBAN  
**Researching Your Civil War Ancestor**  
McHenry County Genealogical Society  
<http://www.mcigs.org/MeetingNew.htm>

18 AUG 2003 - 7 PM

**Fred Egloff - Western Trail?**  
Zion Genealogical Society  
<http://nsn.nslsilus.org/wkkhome/zion/index.html>

21 AUG 2003 - 7 PM

**Ancient Germany**

Researcher/novelist, Jane Swan will discuss her recently completed trilogy, *The Saxon Chronicles*. Her three-volume set covers ancient German Saxon heroes beginning in 782 A.D., moves forward through the middle ages where she begins to trace her own genealogy and continues up to 1900 when she ends with her grandparents

Elgin Genealogical Society  
<http://www.elginarea.org/egs/>

24 AUG 2003 - 2 PM - PARK RIDGE PUBLIC LIBRARY

**IAJGS Convention Report (Harriet Rudnit)  
and New Developments at  
Waldheim Cemetery (Ilene Bass )**  
Jewish Genealogical Society of Illinois  
<http://www.jewishgen.org/jgsi/meetings.htm>

03-06 SEP 2003 - ORLANDO

**Federation of Genealogical Societies  
Conference**  
<http://www.fgs.org/2003conf/FGS-2003.htm>

06 SEP 2003 - 10:30 AM

**Pointers in Person - Italian research group**  
<http://www.rootsweb.com/~itappcnc/>

06 SEP 2003 - 1:30 PM NEWBERRY LIBRARY

MARIAN RICHTER SCHUETZ  
**Cemetery Symbolism**  
Chicago Genealogical Society  
<http://www.chgogs.org/calendar.html>

09 SEP 2003 - MUNDELEIN

CRAIG PFANNKUCHE  
**Using Maps in American Family Research**  
Lake County Genealogical Society  
<http://www.rootsweb.com/~illcgs/index.htm>

11 SEP 2003 - 7 PM

JOVANKA R. RISTIC  
**The American Geographical Society Library**  
McHenry County Genealogical Society  
<http://www.mcigs.org/>

11 SEP 2003 - 7 PM

BRO. JOSEPH MARTIN  
**European Research with a Focus on Poland**  
Tinley Moraine Genealogists  
Tinley Park High School, 6111 W 175<sup>th</sup> St.

14 SEP 2003 - 2 PM MELROSE PARK

**American Historical Society  
of Germans from Russia**

Video presentation of a tour to Russia covering Moscow, Samara, Volga Boat Ride and several former GR villages in the area. The Haas family celebrated the 100th anniversary of the Haas family's emigration to the U.S. in 1903, settling in Kansas. Narrated by Tom Rohr, this will show a most interesting life as it is today in the villages the tour group visited.

[http://www.ahsgr.org/northern\\_illinois\\_chapter.htm](http://www.ahsgr.org/northern_illinois_chapter.htm)

15 SEP 2003 - 7 PM

**Craig Pfannkuche - Railroad Research**  
Zion Genealogical Society  
<http://nsn.nslsilus.org/wkkhome/zion/index.html>

18 SEP 2003 - 7:30 PM

**Patricia Reaves - German Research**  
Northwest Suburban Council of Genealogists  
<http://www.mtprospect.org/nsgs/>

## Other Group Events *(Continued)*

---

20 SEP 2003 - 10 AM - RICHMOND, IL

PEGGY ROCKWELL GLEICH

### **Granny Chatters - Tips & Techniques for Oral Interviews**

BIGWILL

<http://www.rootsweb.com/~wiilbig/meet.htm>

27 SEP 2003 - 9 AM - 4 PM NAPERVILLE

JAMES W. & PAULA STUART WARREN

### **Finding Your One-of-a-Kind Ancestors in Original Documents**

Fox Valley Genealogical Society

<http://www.rootsweb.com/~ilfvgs/index.htm>

02-04 OCT 2003 - ALTOONA, IOWA

### **Where's my Line**

FEATURING GEORGE G. MORGAN AND BEAU SHARBROUGH

IGS Annual Fall Conference

<http://www.iowagenealogy.org/>

03-05 OCT 2003 - ROSEMONT

### **25<sup>th</sup> Anniversary Conference**

Polish Genealogical Society of America

<http://www.pgsa.org/meetings.htm>

04 OCT 2003 - ALL DAY - REGISTRATION REQUIRED

### **4<sup>th</sup> Annual Bus Tour**

Chicago Genealogical Society

<http://www.chgogs.org/calendar.html>

18 OCT 2003 - WISCONSIN DELLS, WI

### **Fall Seminar featuring Rhonda McClure**

Wisconsin State Genealogical Society

<http://www.rootsweb.com/~wsgs/meetings.htm>

24-25 OCT 2003 - SPRINGFIELD

Illinois State Genealogical Society Fall Conference

### **Images and Information:**

### **Past, Present, and Future**

<http://www.rootsweb.com/~ilsgs/projects/2003falconf.pdf>

01 NOV 2003 - ALL DAY

### **Researching Your Immigrant Ancestors:**

FEATURING HELEN HINCHLIFF, SANDRA LEUBKING,

MICHAEL JOHN NEILL

Lake County Genealogical Society

<http://www.rootsweb.com/~illcgs/lcigs/workshop2003.htm>

## Future Research Tasks *(Cont.)*

---

search log entries. This is not something you do once. New sources are discovered (by you) every time you research. New finding aids are being created all the time. Each time you discover a new source, re-examine your dataset to see who might be found in this source and add a task to each of them.

I mentioned above that you should seek out books and websites about the place, but another way to learn more about sources and research is to attend lectures, workshops, and conferences. We devote a section of our newsletter to what other local societies are doing for this purpose.

Good luck and happy (re)searching.

\* [www.familysearch.org](http://www.familysearch.org) research guides exist for the U.S., U.S. Military, each state, Canada, each Canadian province, and many countries. These guides are also available in print through your local Family History Center.

### **After the Meeting**



**Why not join us for a sandwich at Dominick's?**

## Chicagoland Family History Centers

---

Buffalo Grove FHC News

(Cook, Lake Counties)

15 East Port Clinton Road (Corner of Prairie & Port Clinton Roads)

1-847-913-5387

Hours: Wed., Thurs. 10:00am-2:00pm and 7:00pm-9:30pm

Sat. 10:00am-2:00pm

Closed Sunday, Monday, Tuesday and Friday

One of our own members will be conducting this month's education session at the FHC. Mike Karsen will be talking about "Writing Your Family History". These sessions are held monthly on the third Tuesday at 7:30pm.

## July Meeting Notes *by Marilyn Alton*

The program "Family Search Internet Genealogy Service" highlighted the Church of Jesus Christ of Latter-day Saints website, <http://www.familysearch.org>, and was presented by **Maureen E. Brady**.

The presentation was very informative and gave us a tour of areas of the site which many of us do not use. Maureen stated that the main purpose of this site is to get you to the original record (and it is one of the last remaining totally free sites). To that aim, there are 2 million rolls of film and 1 million sets of microfiche available from Salt Lake City with only 2% of this information on the web site.

Do you use the Family Search Internet to only look-up surnames? There is so much more! There are 4 tabs to guide you around this site. They are *Home*, *Search*, *Share*, and *Library*. Each of these was discussed. You may note that each tab has a different main color associated with it. (Home is green, Search is blue, Share is red and Library is purple. This is only relevant as a click may move you to a different tab without you realizing it.) On the Home Page, if you click on the person's face in the *Information* bar on the left-hand side, you will get your own personal helper.

When using the *Search* tab and selecting "*Search for Ancestors*", if you choose "*All Sources*", the results will cover the Ancestral File, Census 1880, International Genealogical Index-North American, Pedigree Resource File and the Social Security Death Index.

The Ancestral File can give individual information on Pedigree, Family & Submitter details. The Ancestral File collection started about 20 years ago. To determine the year the information was submitted to the file look at the submission number. Example: AF92 tells you the data was submitted in 1992. The microfilm will usually have more information so you shouldn't stop here; order it and view yourself.

When searching for your ancestors abroad, use the IGI (International Genealogical Index). This may be familiar to you from the set of microfiche at FHCs. It is now on the Internet and is updated twice a week.

Next in the list is the PRF which is replacing the Ancestral File (AF is no longer being updated). The Pedigree Resource File

may be searched by submission numbers or by using the name, event or date. You can enter first and last names for an individual, parents and spouse. If you click on just a last name you can get up to 200 results on each page. If you have a common name, you will get better results if you also enter the first and last name.

The Social Security Death Index is also available but it has not been updated since September 2000. You may enter last or first name or a social security number. Note: When entering the name and other information, the more information you enter, the more precise the results will be as the computer looks for an exact match. If "all" is selected, the system will look for both Birth and Death locations.

Vital Records covers a limited list of countries (Scandinavian as well as Mexico) but will grow. You can search by any combination of names, however, the country must be selected. Note that you can further click on Batch Number, Call Number or Location to take you to associated information.

The final category is Family History Web sites. When using the Search Family History Web site, choose one category and be specific. For example: enter "Jones, Military Records" instead of "Jones". If you are looking for a record instead of a person enter "Jones Census" instead of Jones, Wisconsin.

Moving on to the next selections, "*Research Guidance*", if you review the information available in this area first, it can make your research much easier. Using *Research Helps* is another area of assistance frequently overlooked. You can sort by place, title and subject or document type (as indicated in the upper left hand corner) to help you find items of interest. This area gives you a list of documents that you can read online or print such as Federal Census schedules and Census Worksheets. Have you tried to write to a foreign county? There is a letter writing guide and a word list for genealogists in different languages. Maps are also available to help your research.

Moving to the next selection, Family History Library Catalog, you are actually moved to the last tab which is *Library*. You may find local History Centers and their locations. This can be very helpful when plan-

ning a genealogy trip. As these are located throughout the world and are staffed by local people, they are a great resource when out-of-town. Also, available is a schedule of classes and conferences available during the current month at the FHL in SLC.

How does the Family History Library differ from the Family History Centers? The Family History Library is located in Salt Lake City, Utah. Family History Centers are branches of the Family History Library with more than 3500 around the world. You may use the Family History Library Catalog to find the films and fiche you would like to rent at your local FHC. The Family History catalog gives you the author, call # and the title of items. You may search by surname, author or subject search.

Are you planning a trip to Salt Lake City for research? Did you know you can pre-order the films you need ahead of your arrival? If you place an order of films you wish to view ahead of your arrival, give a 5 day notice and your order will be processed and waiting for you when you arrive. The Family History Library does not have all the films and microfiche on location. This advance order gives time to retrieve the items from the mountain storage to the library. Also, books are not loaned out to FHCs; this is a good thing to focus on while in SLC. Be sure to read the information in the Library Catalog carefully. Watch for the phrase "No circulation to Family History Centers". These items are available only in Salt Lake City. By the way, there is even a section on the site to assist you in planning your trip to SLC. Review it for local information including restaurants and local accommodations.

Have you searched the tab, *Web Sites*? Have you ever wondered where other Libraries are in the U.S.? You will find categories such as census, concentration camps, directories and population. Under the selection *Web Sites* you can either Browse or Search. By clicking on a selection, different options become available. By selecting Browse and "Library", you will find a list of libraries for the area you are interested in.

This site is chuck full of information which many of us overlook. Thanks Maureen, you have opened our eyes as what else is available, more than just surnames.

# Using The Master Genealogist to Manage Future Research

by Beverly Levine Smallwood

In addition to keeping track of completed research one must also keep a list of things that still need doing. The Master Genealogist (TMG) comes equipped with a Research Log that can help with both completed research and tasks still to be done. It is sufficiently flexible that you can filter and sort your tasks in a variety of ways, making it more powerful than most such lists.

As you are doing data entry, you should be analyzing the source document not only for what it is telling you, both directly and indirectly, but also for what other sources it may lead you to. As you are entering the new data, you may attach your ideas about future research to any person, event, source, or repository with a Research Task entry.

Accessing the Research Log is as simple as pressing F12 or clicking on the icon that resembles a steno pad or selecting Research Log from the Tools menu. This brings up a list of existing tasks attached to whatever you have opened. Click on either the Add button or press F4 to create a new task. It will be attached to the person, event, source or repository that you had opened when you created the task. In TMG5, you have the option to attach it to any of the other categories. In other words, you may attach it to a person, event, source AND repository, all at once. You may not, however, attach it to multiple people, multiple events, multiple sources, or multiple repositories.

The task is divided into many fields. The two most important are the Task Name and Keywords, as you will see later. In addition, there is a free form memo area and a spot to record expenses, if you wish. There are also spots to add a date and text to the various task stages: Designed, Planned, Begun, Progress, and Completed.

Just what to fill in, and how, is a matter of personal taste, but I do have

some recommendations. In order to make entries in any database, you must do so with an eye on the desired results. Let's digress just a moment to the various ways the Research Log may be used. First, you may open it, as mentioned above, by pressing F12, clicking on the icon, or from the Tools menu. Once open, it is focused on the person, source or repository you have open and shows a list of Task Names for that focus sorted by Design Date. Clicking on each task will show most of the details for that task in the pane to the right, except for the keywords field. You must open each task to see its Keywords.

You may change the focus by clicking on the focus box (TMG5) or the focus menu (TMG4). Your choices are: All Tasks, General Topics, A Person, An Event, A Source, or A Repository. I typi-

**As you are doing data entry, you should be analyzing the source document not only for what it is telling you, both directly and indirectly, but also for what other sources it may lead you to.**

cally chose All Tasks at this point. You will note that you may filter these tasks by either the Keywords or the Task Name. Sorting is permitted by Task Name, Principle 1, Principle 2, Designed Date or Complete Date, but not by Keywords.

In Reports, choose List of Tasks. You may filter by any field in the task as well as many aspects of what it is attached to. Report output may be sorted by Type/Person, Designed, Planned, Begun, Progress, Completed, Keyword or Task Name. Since Keywords may not be sorted when accessed from the menu (though the report does allow it), I choose to use Keywords strictly to filter. To my mind, the most important filter is where the task may be performed.

Many sources may be found in multiple locations. For instance, if you wished to view the 1900 census for Chicago, in addition to various online subscription sites, you might find it on microfilm at: the Arlington Heights Memo-

rial Library, The Newberry Library, The Harold Washington Library, the National Archives, the Family History Library, the Allen County Public Library in Fort Wayne, Indiana, and many, many other such places. Since I have been known to frequent many of these places and travel occasionally to the others, I put in a keyword entry for every place I can think of. That way, I can pull a list of things to do at whatever library, archives, or repository I happen to be going to next.\*

Since I plan to use the Keywords field to filter for WHERE the research can be done, I plan to sort by the Task Name. This means that it not only has to be descriptive, but if formatted in a consistent manner, it can put similar research tasks together in the list. For instance, I typically begin the entry with a three or four

letter code like OBIT or CEN to put all the census or obituary research together. I put additional data on the line in order from least to most specific.

When looking for a census microfilm, you need to first look at the year, then the state, and at this point either the soundex code or the film reel/ED number/page/line number then the name of the person. As you do the search, you may have to go back and modify the task name, say from the soundex to the film/ED/Page/Line. If I have a list of people to find on the census, I tend to look up all the soundex entries first and then go to the actual films. You'd be amazed how often people wind up on the same roll of film, even if they are in different Enumeration Districts. This saves me from pulling the same roll of film over and again. Thus, my task name might look like: *CEN 1900 T623 #279 ed 847 sheet 9 line 53 HANDS family.*

When looking for an obituary, you might first want to indicate the city or newspaper, then the date (entered as yyyy-mm-dd to sort properly), then the name of the person. Any additional details can go in the memo field. You get the idea.

## Manage Future Research (Continued)

Least specific is grouping the task by type of source then move across the line getting more specific as you go.

The report I use most is my "Things to do at ..." report. This is a List of Tasks report, filtered or focused using KEYWORD contains [?] and sorted by Task Name. Using [?] rather than a name causes the report to prompt you to "fill in the blank" each time it is run. Thus, the same report can be used to pull items for NEWBERRY this time and FT WAYNE next time. TMG4 has check boxes to include/exclude the various parts of the task including the memo and the memo of the item the task is attached to. TMG5 does not yet have that feature, so

it prints anything you have filled in and omits the rest. It does not have the option of including the memo of the event, etc. that the task is attached to.

Now, let's look at some other ways you may want to filter your to-do list. These are all filters built in TMG5, but the idea is similar using version 4. Suppose you want to concentrate on a surname line. Your filter might be LINKED PERSON... SURNAME = [?]. This would give me all the tasks attached to anyone named Huntington, or whatever name I input. Suppose instead that I want to look only at my ancestors and ignore the collateral lines. I can do this because I have a flag created for ancestors, so my

filter is LINKED PERSON... RELATED (my flag name) = A (the code I designated for ancestors). I can, of course, combine these filters with an "AND" to get anyone named Huntington who is my ancestor.

The filters could also include or exclude completed tasks. You get the idea. For more ideas and a sample report, please reference my 1999 handout using version 4 at <http://www.rootsweb.com/~ilcaggnl/sigs/tmg/meetings/1999/October.pdf>.

\* The CAGG-NI Library Database can help you to discover where else you might find an item.

Research Task

Person  Not assigned yet

Event  15031 : ( Birth ) Fred Martens (1:6555)

Source  Not assigned yet

Repository  Not assigned yet

Edited : 13 June 2001

Task Name : CEN-1880 IL M635 Martens, Fred age 9

Designed : 16 Dec 1998

Planned :

Begun :

Progress :

Completed :

Keyword : Ft Wayne SLC Newberry National Archives FamilySearch Expenses : 0.00

Comment :

OK Cancel Help

# Using PDF Documents to Their Fullest *By Anne Jacobs*

Some time ago I learned some really neat features of Adobe Acrobat Reader® and PDF files. A comment at the last meeting made me realize that maybe I should share this information with you who have not yet discovered these features. Adobe Acrobat Reader is the software which is used to open, display and print this newsletter. Our newsletter is created as a PDF, portable document format. This document format was developed by Adobe, in part, so a document would look the same no matter what printer it was printed on or what computer it was viewed on. If you printed a Word® document on your printer, shared it with a friend who printed it on a different brand printer, a comparison might reveal that the pagination<sup>1</sup> is different between the two printouts, causing an item to appear on page 5 in your printout but on page 6 on your friend's printout. This uniformity feature is important when you are trying to work with a group using the same document.

The main feature I would like to discuss is the facility to copy either text or graphics out of a PDF for use elsewhere. Just because you find something in a PDF does not mean that you have to retype the information in order to use it. There is a "selection tool" available to "cut and paste" from a PDF into another word processing format which you are familiar with and have more control over. Bev informs me that some PDF documents may be protected from using these tools. Although I have never encountered this, please be aware that you may run into such a situation.

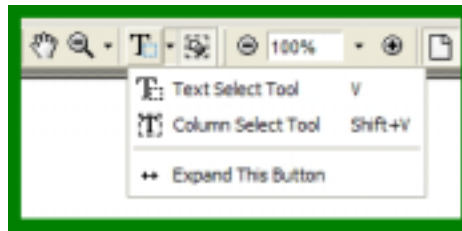
The selection tools are found on the toolbar as indicated by the figure below which highlights the Text Selection choice.

Figure 1: Text Selection Tool



By using the dropdown arrow for this Text Selection Tool, additional selections are available.

Figure 2: Dropdown Menu for Text Selection Tool



This also highlights one problem responded to in the latest versions of Adobe Reader by providing a "column selection" tool. Prior to this feature, your selection would span columns mixing the text altogether and you were left to unjumble the copied text. This is definitely an improvement.

As with most tools, shortcut keys are indicated. By using these "hotkeys", you can activate the tool without moving from the keyboard. Depressing "V" activates the text selection tool as indicated in the above figure; "Shift V" activates the column selection tool. However, to actually select the text, you still need to use the mouse.

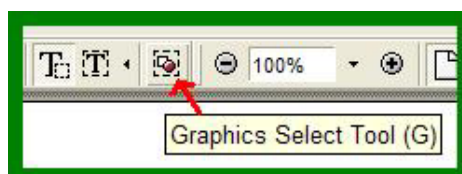
You can add both these selection tools to your toolbar by using the "Expand This Button" choice. This converts the dropdown menu to separate icons on the toolbar. See figure below.

Figure 3: Expanded Text Selection Buttons



Don't overlook the graphic selection tool.

Figure 4: Graphic Select Tool



Now, after selecting the appropriate selection tool, highlight the text, column or graphic, you want to capture as indicated below:

Figure 5: Text Selected



At this point you copy using your normal method (Edit Menu>Copy or CTRL+C) to copy the selection and your normal method of pasting the selection (Edit Menu>Paste or CTRL+V) where you want (WordPerfect, Word, WordPad or Notepad). I have pasted the selection below to demonstrate its use.

Figure 6: Pasted Copied Selection  
**Backup/Restore**

TMG includes an integrated utility with which to compress a TMG data set and copy it to another location on your hard disk or to a floppy disk for archival purposes. The same utility can be used to decompress and restore the data set in the event of accidental data loss.

If your Adobe Acrobat Reader toolbar does not look like these figures, you may have an earlier version of the package. These images were created using Version 5. You may want to upgrade your Adobe Acrobat Reader software. Now, PDF documents should no longer frustrate you because you can't get to the content. Now you can cut this article out and paste it in your own document. However, don't republish it. It is copyrighted. ;>) (winking emoticon).

## (Endnotes)

<sup>1</sup>Pagination is the act of formatting a document determining page divisions. This is automatically done each time a document is sent to a printer. Unless you are working with a very long document, you don't even realize that it is happening; it is so fast.