



**FAMILYSEARCH.**  
UNITING FAMILIES

# Personal Ancestral File 5.2

**USER'S GUIDE**



**Important:** For version 5.2, minimal changes were made to the help and *Users Guide* to correct errors and to explain new features. Because the changes are so minor, it is recommended that you *not* print the entire *Users Guide* for 5.2 if you printed the previous version.

The text for the *Users Guide* is identical to the information found in the online help, and the online help actually contains more information than the *Users Guide*. If you use the online help, you do not need to print the *Users Guide*, which is nearly 200 pages.

© 2002 by Intellectual Reserve, Inc. All rights reserved. Printed in the USA. Second edition May 2002. English approval: 05/02.

You can print this document for help with using Personal Ancestral File. No part of this document may be reprinted, posted on-line, or reproduced in any form for any purpose without the prior written permission of the publisher. Send all requests for such permission to:

Copyrights and Permissions Coordinator  
Family and Church History Department  
50 East North Temple Street  
Salt Lake City, UT 84150-3400  
USA  
Fax: 801-240-2494  
E-mail: [fhd-copyright@ldschurch.org](mailto:fhd-copyright@ldschurch.org)

FamilySearch is a trademark of Intellectual Reserve, Inc. Adobe and Acrobat are trademarks of Adobe Systems Incorporated.

---

# Table of Contents

<b>Changes made for the 5.2 version of the <i>Users Guide</i> . . . . .</b>	<b>11</b>
<b>Introduction . . . . .</b>	<b>12</b>
Protecting the privacy of living people . . . . .	12
What if you have problems using the program? . . . . .	12
Using the keyboard . . . . .	13
What is Personal Ancestral File Companion? . . . . .	13
What is new? . . . . .	13
Major changes made since Personal Ancestral File 5.1.12.0 . . . . .	13
Major changes made since Personal Ancestral File 5.0.1.10 . . . . .	14
Major changes made since Personal Ancestral File 4.0.4 . . . . .	14
Obtaining information about The Church of Jesus Christ of Latter-day Saints . . . . .	15
<b>Using the online help . . . . .</b>	<b>16</b>
How to obtain help with an item on a screen . . . . .	16
How to obtain help with an entire screen . . . . .	16
How to search the index of the online help file. . . . .	17
How to use the table of contents in the online help. . . . .	17
How to conduct a full-word search in the online help . . . . .	17
<b>Managing .paf files . . . . .</b>	<b>18</b>
Transferring information from another program. . . . .	19
How to create a new .paf file. . . . .	19
How to open an existing .paf file . . . . .	19
How to search for existing .paf files . . . . .	20
How to convert .paf files . . . . .	20
How to close a .paf file . . . . .	21
How to delete a .paf file . . . . .	21
How to make a backup copy . . . . .	21
How to restore a backup copy . . . . .	22
How to check and repair .paf files. . . . .	23
How to split a .paf file . . . . .	23
How to combine .paf files . . . . .	24
How to read file properties . . . . .	24
<b>Navigating through a .paf file . . . . .</b>	<b>25</b>
Symbols on the Family View screen and Pedigree View screen . . . . .	25
How to switch from one view screen to another. . . . .	25
Using the Family View screen . . . . .	26
How to move an individual to the primary position on the Family View screen . . . . .	26
Shortcuts for the Family View screen . . . . .	26
Using the Pedigree View screen . . . . .	27
About InfoBoxes . . . . .	27
How to move an individual to the primary position on the Pedigree View screen . . . . .	27
Shortcuts for the Pedigree View screen . . . . .	28

Using the Individual View screen . . . . .	28
How the program sorts names . . . . .	29
How to add columns to the Individual View screen . . . . .	29
How to remove columns from the Individual View screen . . . . .	29
How to change the order of columns on the Individual View screen . . . . .	29
How to sort individuals on the Individual View screen . . . . .	30
How to resize columns on the Individual View screen . . . . .	30
Shortcuts for the Individual View screen . . . . .	30
<b>Typing diacritics and special characters . . . . .</b>	<b>31</b>
How to use the character map . . . . .	31
How to use the 10-key pad to type diacritics . . . . .	31
Decimal numbers for diacritics . . . . .	32
<b>Adding individuals and families . . . . .</b>	<b>33</b>
Guidelines for adding individuals . . . . .	34
Using the Full Name field . . . . .	34
Handling unknown spouses . . . . .	34
Preference options that affect how records are added . . . . .	35
How to add an individual to a family . . . . .	36
How to add an individual who is not linked into a family . . . . .	36
How to add a family . . . . .	37
How to add a marriage record . . . . .	37
Using ditto features . . . . .	38
How to use ditto . . . . .	38
How to use Cut, Copy, and Paste . . . . .	39
Linking individuals to multiple spouses . . . . .	39
How to link an individual to another spouse . . . . .	39
How to display another spouse on the Family View screen temporarily . . . . .	40
Linking individuals to multiple parents . . . . .	40
Displaying stepchildren and adopted children . . . . .	40
How to link a child to another set of parents . . . . .	41
How to specify the primary parents . . . . .	41
How to change the parent link . . . . .	42
How to display another set of parents temporarily . . . . .	42
How to add sealing-to-parent information . . . . .	42
Guidelines for names . . . . .	43
Guidelines for event dates . . . . .	43
Guidelines for event places . . . . .	45
Guidelines for Latter-day Saint ordinance information . . . . .	46
<b>Editing individuals and marriages . . . . .</b>	<b>48</b>
How to edit individual records . . . . .	48
How to edit marriage records . . . . .	48
<b>Changing the order of children, parents, and spouses . . . . .</b>	<b>49</b>
How to change the birth order of children . . . . .	49
How to change the order of spouses . . . . .	49
How to change the order of parents . . . . .	50
<b>Removing individuals from families . . . . .</b>	<b>51</b>
How to remove an individual from a family . . . . .	51
How to unlink an individual from a set of parents . . . . .	51

<b>Deleting individuals</b> .....	<b>53</b>
How to delete an individual. ....	53
How to delete a marriage. ....	53
<b>Using custom events and attributes.</b> .....	<b>55</b>
How to add a custom event or attribute to an Individual or Marriage screen . . . .	55
How to remove a custom event or attribute from an Individual or Marriage screen	56
How to add a custom event or attribute to the Individual Event List or Marriage Event List	56
How to edit a custom event or attribute on the Individual Event List or Marriage Event List	56
How to delete a custom event or attribute from the Individual Event List or Marriage Event List	57
<b>Citing sources.</b> .....	<b>58</b>
How sources are stored . . . . .	58
Guidelines for citing sources. . . . .	58
Linking sources to individual and marriage events. . . . .	58
Using the sources in the .paf file. . . . .	59
Typing source titles . . . . .	59
Using style guides for sources. . . . .	61
Adding sources to events on individual and marriage records and to families. . . .	61
How to add a new source to an individual record or marriage record . . . .	61
How to link an existing source to an individual record or marriage record	62
Copying sources . . . . .	62
How to copy source descriptions . . . . .	63
How to copy a source description and citation . . . . .	63
Editing sources . . . . .	64
How to edit or replace a source description . . . . .	64
How to edit the citation . . . . .	65
How to change or remove the repository from a source . . . . .	65
Removing sources from individuals, marriages, and families . . . . .	65
How to remove a source from a record . . . . .	65
Deleting sources from the .paf file . . . . .	66
How to delete a source from the .paf file. . . . .	66
Using the Source List . . . . .	66
How to use the Source List to add a source description. . . . .	67
How to use the Source List to edit a source description . . . . .	67
How to use the Source List to delete a source description. . . . .	67
Using multimedia in sources. . . . .	67
How to add multimedia to a source description. . . . .	68
How to add multimedia to a source citation. . . . .	68
How to change the multimedia file that is linked to a source description .	69
How to change the multimedia file that is linked to a source citation . . . .	69
How to remove multimedia from a source description . . . . .	70
How to remove multimedia from a source citation . . . . .	70
Examples of sources . . . . .	71
Birth certificates and similar records . . . . .	71
Published books . . . . .	71
Multivolume books . . . . .	72
Privately published books . . . . .	72
Interviews and oral histories . . . . .	73
Personal journals and diaries . . . . .	73

Magazine and newspaper articles . . . . .	74
Microfilmed records (such as censuses, parish registers, and so forth) . . .	74
Compact discs . . . . .	75
Personal knowledge . . . . .	76
Correspondence (such as letters or e-mail) . . . . .	76
Objects with an inscription. . . . .	77
Internet sources . . . . .	77
Family records and genealogies . . . . .	77
<b>Keeping track of repositories . . . . .</b>	<b>79</b>
Using names and addresses of private individuals . . . . .	79
How to add, edit, or remove a repository . . . . .	79
How to delete a repository from the .paf file . . . . .	80
<b>Using notes . . . . .</b>	<b>81</b>
Guidelines for notes. . . . .	81
Using tags . . . . .	82
Converting notes to custom events . . . . .	82
Converting sources that are stored in notes. . . . .	83
How to input notes that were stored in separate files . . . . .	83
How to add or edit notes . . . . .	84
How to use ditto to copy notes . . . . .	85
How to find and replace text in notes . . . . .	85
How to delete notes . . . . .	86
Using the Notes Selector screen . . . . .	87
How to turn the Notes Selector screen on or off . . . . .	87
How to use the Notes Selector to display notes . . . . .	87
How to add or edit a tag on the Notes Selector screen. . . . .	88
How to change the order of tags on the Notes Selector . . . . .	88
How to remove a tag from the Notes Selector . . . . .	88
How to return to the default list of tags . . . . .	89
<b>Using multimedia . . . . .</b>	<b>90</b>
Obtaining multimedia . . . . .	90
Acceptable multimedia formats. . . . .	90
Managing multimedia files . . . . .	91
Sharing multimedia . . . . .	92
How to add multimedia to individuals . . . . .	92
How to edit the item time, file, caption, and description . . . . .	93
How to remove multimedia from an individual . . . . .	93
How to edit a photo . . . . .	94
How to assemble and view scrapbooks. . . . .	94
How to assemble and view slideshows . . . . .	95
<b>Tracking contact information . . . . .</b>	<b>97</b>
How to add, edit, and delete contact information . . . . .	97
<b>Finding individuals in a .paf file . . . . .</b>	<b>98</b>
How to find the home person . . . . .	98
How to find an individual on a list . . . . .	98
How to find an individual by RIN or MRIN. . . . .	99
How to find a couple . . . . .	99
How to find an individual's descendants . . . . .	99

<b>Creating focus lists</b> .....	<b>100</b>
What you can do with a focus list .....	100
How to create a focus list .....	100
How to view the individuals in a focus list .....	101
How to save focus lists .....	102
How to retrieve and delete focus lists .....	102
Combining relationship filters and field filters .....	103
Using relationship filters .....	103
Choosing a relationship filter .....	103
Using field filters .....	104
Combining field filters .....	105
Filling out field filters .....	105
How to define a field filter .....	106
How to save field filters .....	106
How to retrieve field filters .....	106
How to delete field filters .....	107
Examples of using Advanced Focus/Filter .....	107
Case Study: Editing a group of records .....	107
Case Study: Deleting a group of records .....	107
Case Study: Identifying missing information .....	108
Case Study: Preparing for a research trip .....	108
Case Study: Printing a list of contact information .....	109
Case Study: Finding all individuals with multimedia and moving all multimedia files to the same folder .....	110
<b>Importing GEDCOM files</b> .....	<b>112</b>
How to import GEDCOM files .....	112
Working with imported information .....	112
<b>Sharing your information with others (Exporting GEDCOM files)</b> . . . .	<b>114</b>
What is GEDCOM? .....	114
Creating GEDCOM files .....	115
Understanding UTF8, Unicode, ANSEL, and ANSI .....	115
Programs that accept GEDCOM 5.5 .....	115
How to create GEDCOM files .....	116
Submitting information to Ancestral File and Pedigree Resource File .....	117
Conditions for submitting to Ancestral File and the Pedigree Resource File 118	
Copyright for Ancestral File and Pedigree Resource File .....	118
Correcting information in Ancestral File and Pedigree Resource File . . .	119
How to submit information to Ancestral File and Pedigree Resource File	119
<b>Submitting names for temple work</b> .....	<b>121</b>
Guidelines for submitting names for temple work .....	122
Information required for temple ordinances .....	122
Estimating information for temple ordinances .....	123
How to create a GEDCOM file for TempleReady for Windows .....	123
How to create a GEDCOM file for TempleReady for DOS .....	124
How to add TempleReady updates (.oup files) .....	125
<b>Printing reports</b> .....	<b>126</b>
Printing LDS ordinance information .....	126
How to preview reports .....	126
How to save reports as files .....	127

How to print pedigree charts . . . . .	127
How to print family group records . . . . .	128
How to print ancestry charts . . . . .	129
How to print descendancy charts. . . . .	130
How to print books . . . . .	130
How to print individual summaries. . . . .	131
How to print scrapbook pages. . . . .	131
How to print lists. . . . .	132
How to print calendars . . . . .	133
Setting general print options . . . . .	134
How to set up the page. . . . .	134
How to select a different printer. . . . .	134
How to select fonts for reports . . . . .	135
How to change the title. . . . .	135
How to print photos on reports. . . . .	135
How to set report preferences. . . . .	136
<b>Creating and printing custom reports . . . . .</b>	<b>137</b>
How to create and print a custom report . . . . .	137
Saving, reusing, and deleting custom reports . . . . .	138
How to save a custom report . . . . .	138
How to reuse a custom report. . . . .	138
How to modify a custom report . . . . .	139
How to delete a custom report . . . . .	139
<b>Creating web pages . . . . .</b>	<b>140</b>
How to create web pages. . . . .	140
How to change the title . . . . .	141
<b>Merging duplicate records. . . . .</b>	<b>142</b>
Case Study: Importing and merging records. . . . .	142
Case Study: Using the Export, Import, and Match/Merge features to synchronize files 143	
Merging individual records . . . . .	144
Identifying duplicate individual records . . . . .	144
Strategies for the Match/Merge feature . . . . .	144
What happens to merged records? . . . . .	145
How to change the options used to select potential duplicate records. . . . .	145
How to merge records that you select . . . . .	146
How to merge records by name . . . . .	147
How to merge records by Ancestral File numbers (AFNs) . . . . .	148
How to merge records by unique record serial number . . . . .	149
Merging sources and repositories . . . . .	150
Identifying duplicate sources and repositories . . . . .	150
How to merge sources and repositories . . . . .	150
<b>Setting preferences . . . . .</b>	<b>151</b>
How to set preferences on the General tab . . . . .	151
How to set preferences on the File tab . . . . .	152
Understanding the log . . . . .	153
How to set preferences on the Names tab . . . . .	154
How to set preferences on the Prepared By tab. . . . .	154
How to set preferences on the InfoBox tab. . . . .	154
How to set preferences on the Fonts tab . . . . .	155



How to set preferences on the Multimedia tab . . . . .	156
How to set preferences on the Formats tab . . . . .	156
How to set preferences on the Folders tab . . . . .	157
How to set preferences on the Templates tab . . . . .	158
Using templates . . . . .	158
Understanding the Phonetic Name and Romanized Name fields . . . . .	158
How to create or modify a template . . . . .	159
How to delete a template . . . . .	160
How to select the active (default) template . . . . .	160
How to select a template for an individual record or marriage record. . . . .	161
<b>Making global changes . . . . .</b>	<b>162</b>
How to make global changes. . . . .	162
<b>Changing surnames to mixed case . . . . .</b>	<b>164</b>
How to change surnames to mixed case . . . . .	164
<b>Using the Relationship Calculator . . . . .</b>	<b>165</b>
How to calculate the relationship between two individuals . . . . .	165
<b>Using the Date Calculator . . . . .</b>	<b>166</b>
What is the Gregorian Calendar? . . . . .	166
How to calculate a date based on one date and an elapsed amount of time . . . . .	166
How to calculate the elapsed time between two dates . . . . .	166
<b>Using the Soundex Calculator . . . . .</b>	<b>168</b>
How to calculate a Soundex code with the Soundex Calculator. . . . .	168
How to manually calculate a Soundex code . . . . .	168
<b>Conducting Internet searches. . . . .</b>	<b>170</b>
How to conduct Internet searches . . . . .	170
<b>Using Notepad for Personal Ancestral File . . . . .</b>	<b>171</b>
How to open Notepad documents . . . . .	171
How to set the font of a Notepad document . . . . .	171
How to add, edit, and delete text in a Notepad document. . . . .	172
How to go to a specific line in a Notepad document. . . . .	172
How to find text in a Notepad document . . . . .	172
How to print Notepad documents . . . . .	173
How to close a Notepad document . . . . .	173
<b>Glossary . . . . .</b>	<b>174</b>
<b>Index . . . . .</b>	<b>187</b>



---

# Changes made for the 5.2 version of the *Users Guide*

Minimal changes were made to the help and *Users Guide* to correct errors and to explain new features. Because the changes are so minor, it is recommended that you *not* print the entire *Users Guide* for 5.2 if you printed the previous version.

**Important:** The text for the *Users Guide* is identical to the information found in the online help, and the online help actually contains more information than the *Users Guide*. If you use the online help, you do not need to print the *Users Guide*, which is nearly 200 pages.

If you printed a previous version of the *Users Guide* for version 5.0 and would like to see or print only the significant changes, please review the following chapters:

- **Introduction.** “What is new?” (p. 13) and “Obtaining information about The Church of Jesus Christ of Latter-day Saints” (p. 15) were updated.
- **Adding individuals and families.** “Guidelines for event dates” (p. 43) now contains information about what to enter for children who died before age 8 and how to enter B.C. dates. “Guidelines for Latter-day Saint ordinance information” (p. 46) now contains information about what to do if a sealing was cancelled or should not occur.
- **Using notes.** Minor changes were made to “Using tags” (p. 82) and “How to add or edit notes” (p. 84).
- **Using multimedia.** “Managing multimedia files” (p. 91) now contains information about how to use absolute and relative paths to better manage your multimedia files.
- **Creating focus lists.** A new example, titled “Case Study: Finding all individuals with multimedia and moving all multimedia files to the same folder” (p. 110) has been added to further clarify the use of absolute and relative paths. A minor correction was made to “Choosing a relationship filter” (p. 103).
- **Submitting names for temple work.** “How to add TempleReady updates (.oup files)” (p. 125) was added to explain this new feature.
- **Creating web pages.** Minor changes were made to “How to create web pages” (p. 140) to emphasize that you should maintain the privacy of individuals who may still be living.
- **Merging duplicate records.** A minor correction was made to the section “How to merge records by unique record serial number” (p. 149).
- **Making global changes.** This chapter, starting on page 162, was modified to explain how to use the new searches available in the Global Search and Replace feature: notes, names, and temple codes.
- **Using Notepad for Personal Ancestral File.** This entire chapter, starting on page 171, is new.

---

# Introduction

FamilySearch™ Personal Ancestral File is a tool to help you record, manage, and share your genealogical information. With this program, you can create and store family information about thousands of individuals.

After you have typed an individual's information, you can link that individual to families and then link families together. The program displays the individual's information as you request. For example, an individual can be seen in a family as a child with siblings or as a parent with a spouse. You can display family groups any way you want.

Once you have names in your file, you can search for and find specific individuals. You can change or correct an individual's information as needed. After you change an individual's information once, the changed information appears any time you display that individual.

**Tip:** For basic information on how to use the program, see the *Getting Started* guide. From the Help menu, select Getting Started Guide. The guide will open in your word processor or in WordPad.

## Protecting the privacy of living people

Using a computer for recording genealogical information allows you to easily share your information with others.

However, as you share information, please respect the privacy of individuals who may be living. Do not share information (such as home addresses and telephone numbers, social security numbers, and mothers' maiden names) that could be used to embarrass or harm people who may still be living.

**Tip:** To create a file that does not contain information about living individuals, use the Export feature.

## What if you have problems using the program?

The help system and *Getting Started* guide are designed to give you the help you need. In addition, the Frequently Asked Questions and Feedback features for Personal Ancestral File may be helpful. These are found at <http://www.familysearch.org/paf>.

**Tip:** If you have an Internet connection, you can go directly to this web page. From the Help menu, select Feedback and Frequently Asked Questions.

If you have a question not addressed in the help system or the *Getting Started* guide, please refer to the Frequently Asked Questions option. These questions and answers are updated frequently, based on users' responses.

If you do not find the answer you are looking for in Frequently Asked Questions, please use the Feedback option to submit your question. You can also use the Feedback option to report problems with Personal Ancestral File or to suggest improvements. Your feedback is appreciated and will help improve Personal Ancestral File.

**Tip:** You may also be able to find help from a Personal Ancestral File user group. A link to a list of user groups is provided in the Frequently Asked Questions feature found at [www.familysearch.org/paf](http://www.familysearch.org/paf).

## Using the keyboard

You can access all of the features in the program without a mouse.

- **Shortcut keys.** Several features have shortcut keys. You can see them on the pull-down menus at the top of the screen. For example, on the File menu, the shortcut key for the Open feature is Ctrl+O. This means that you press the Ctrl key and the letter O at the same time to open a file.
- **Underlined letters.** If an option has an underlined letter, press Alt plus that letter to use that option.
- **Active button.** On a screen, one button may be active. This button has a darker line around the outside. The words on the inside have a dotted line around them. Press the Enter key to use the active button.
- **Tabs.** On screens that have tabs, such as the Preferences screen, press the Ctrl+Tab keys to go to the next tab.
- **Close screens.** To close most screens, press the Esc key.
- **Drop-down boxes.** To view the options available on a drop-down box, press the F4 key.
- **Family View, Pedigree View, and Individual View screens.** Press the arrow, Page Up, Page Down, Home, and End keys to move around these screens.

## What is Personal Ancestral File Companion?

Personal Ancestral File Companion is a utility program designed to print high quality genealogical charts and reports directly from Personal Ancestral File.

To use the Companion in Personal Ancestral File 5.0, you must use version 5.0 of the Companion. Personal Ancestral File prints many of the same reports as the Companion, though the Companion prints them in a different format. Some individuals prefer the way that the Companion prints reports. The Companion also prints some reports that Personal Ancestral File does not, including:

- Fan charts.
- Descendancy lists that are not indented.
- Kinship reports.
- Hourglass reports.

The Companion can also compare the .paf file against the Master Index of the Pedigree Resource File. This can help you identify information that you can add to the .paf file and information that you may want to submit to the Pedigree Resource File.

The Companion is available from Church distribution centers for \$10 (U.S.). It is available in English only.

## What is new?

### Major changes made since Personal Ancestral File 5.1.12.0

- **More fields available in Global Search and Replace.** You can now use the Global Search and Replace feature to make changes to the Full Name field, notes, and temple codes.
- **Ability to add ordinance information from TempleReady.** You can add ordinance dates from an .oup file from TempleReady.
- **Increased protection of privacy of living individuals.** When you create Web pages, the Hide Details for the Living option is selected by default. If you select it, you will receive a reminder to obtain their permission before you post the pages.

### Major changes made since Personal Ancestral File 5.0.1.10

- **PAF for the Palm.** You can now create a GEDCOM file and view it on your Palm Pilot. The required software (PAF for the Palm) is also included with this release of Personal Ancestral File. You can either download it from [www.familysearch.org](http://www.familysearch.org) or obtain it from the Personal Ancestral File compact disc.
- **Check for updates.** If you have an Internet connection, you can have Personal Ancestral File check for a new version of the software. If one is available, you can download it.
- **New languages.** You can run the program in English, Japanese, Chinese, Korean, German, or Swedish.

### Major changes made since Personal Ancestral File 4.0.4

- **New and improved help.** The online help has been improved and expanded. You can obtain help with parts of the screen and help for an entire screen. You can also find answers to the most common questions and problems that people experience with a particular screen or feature.
- **Templates.** You can customize the Individual screen and Marriage screen. You can specify which fields appear and in what order they appear.
- **Single name field.** The Individual screen has one field for both the given name and surname. The program will put slash marks (/) around the surname. In preferences, you can specify whether the surname comes first or last or whether you will be using double surnames.
- **Add family.** You can now add an entire family at once. The program will prompt you to add the father, the mother, the marriage information, and each of the children.
- **Export for TempleReady.** The File menu has an option that allows you to export names for TempleReady.
- **Family View and Pedigree View.** The Family View screen and Pedigree View screen are now shown as tabs. To switch between them, you click the tabs.
- **Individual View.** You can now view a list of the individuals in the .paf file on a main view screen. You can sort the list alphabetically by name or numerically by RIN.
- **Preferences.** Some options have been moved to different tabs. A new tab has been added to allow you to add templates. You can also specify the font used in the dialogs (screens other than the Family View screen, Pedigree View screen, and Individual View screen).
- **Nonroman characters.** You can now add nonroman characters, such as those from Japanese, Chinese, Korean, and Cyrillic writing systems.
- **Match/Merge.** The Match/Merge feature has been improved. The Merge on AFN option has been integrated into the Match/Merge feature.
- **Unique record serial numbers.** The program now assigns each record in the .paf file a unique serial number. Like a record identification number (RIN), a unique record serial number identifies each individual in a .paf file. Unlike a RIN, a unique record serial number is unique worldwide. This means that each individual in each of the .paf files has a different number than all other individuals in all other .paf files that are made worldwide. The unique record serial number does not change if you export a GEDCOM file and send it to another person. Therefore, you can send a GEDCOM file to another individual, he or she can import it into

Personal Ancestral File, make changes to it, create another GEDCOM file, and send it back to you. You can then use the Match/Merge feature to identify the records that you originally created, identify what changes the other person made, decide which information to keep, and merge the records. You cannot see a unique serial number on the Individual screen, and you cannot edit it.

**Obtaining  
information about  
The Church of  
Jesus Christ of  
Latter-day Saints**

Personal Ancestral File was created by The Church of Jesus Christ of Latter-day Saints to help its members and others manage their family history information.

To obtain more information about the Church, from the Tools menu, select About the Church of Jesus Christ of Latter-day Saints.

**Tip:** When you use this option, the program looks for an Internet browser and sends you to the Church's web page ([www.mormon.org](http://www.mormon.org)).

---

# Using the online help

The online help system can help you use this program and solve problems that you may experience.


You can obtain help with a screen as a whole or with a specific item on the screen.

If you do not find the information that you want, you can search the index or table of contents.

**Tip:** The information in the users guide comes directly from the online help, though the online help contains more information than the user's guide. The online help, for example, contains information on how to solve problems.


## How to obtain help with an item on a screen

You can obtain information about a specific field, check box, button, or other screen item.

**Tip:** This type of help is not available for the Family View screen, Pedigree View screen, or Individual View screen. For more information about the screen, click .

### *Steps*


**Tip:** As you type information into a field, press **F1**. Help will appear for that field.

1. In the upper-right corner of the screen, click .
2. Click the screen item. A brief help message appears to explain the screen item. The message may contain a link to more information.
3. Click the mouse, or press any key to remove the help message.

## How to obtain help with an entire screen

You can obtain help with an entire screen. The help screen that appears will explain the purpose of the screen and link you to related procedures, concepts, and problem-solving topics.

### *Steps*


1. If you are on the Family View screen, Pedigree View screen, or Individual View screen, click . Or if you are on another screen, click the **Help** button on that screen.
2. A help screen appears to explain the screen.
3. To close a help screen, click the **X** button in the upper-right corner of the help screen.



## How to search the index of the online help file

Much like a printed book, the online help has an index that can help you find information.




### Steps

1. On a help screen, click the **Index** tab.  
**Tip:** If the Index tab is not displayed, click the **Show** button: .
2. Type the word that you want to find in the index. If the index does not contain the word, search for a related word.
3. When you find the index entry that you want, click it.
4. Click **Display**.
5. Click the topic that you want, and click **Display**.

## How to use the table of contents in the online help

Like a printed book, an online help system has a table of contents.

### Steps


1. On a help screen, click the **Contents** tab.  
**Tip:** If the Contents tab is not displayed, click the **Show** button: .
2. Find the topic that you want to see:
  -  represents a chapter. Click it to see the first topic of the chapter. Double-click it to see a list of the topics in the chapter.
  -  represents a help topic. Click it to read the help topic.

## How to conduct a full-word search in the online help

Unlike a book, you can search an online help system for words and phrases. The full-word search feature is often used as a last resort. However, the search is based upon exact words only. Therefore, remember the following cautions:

- If you search for a word that is commonly used in the help system, you may find more topics that you will want to search.
- If you search for a word that is not used in the help system, you will not find any topics.

### Steps

1. On a help screen, click the Search tab.  
**Tip:** If the Search tab is not displayed, click the Show button: .
2. Type the word(s) that you want to find.
3. Click **List Topics**.
4. Click the topic that you want to see.
5. Click **Display**.

---

# Managing .paf files

A .paf file is a group of records that can be accessed, altered, saved, and shared. Each individual, marriage, source, and repository is a different record.

A .paf file can hold millions of individuals. Your actual limit will be the amount of disk space you have available and the performance of your computer. As the .paf file gets larger, certain functions start to work slower. For example, the alphabetical search list gets slower as the number of individuals grows. From a practical standpoint, you probably will not want to add more than 50,000 or 100,000 individuals to a single .paf file.

The .paf files are stored as files on your computer. How you organize and maintain these files will determine, in large part, how the program works for you.

Use the following guidelines to determine how to manage your information.

## *Storing different family lines in different .paf files*

Store different family lines in different .paf files on your hard drive if:

- You have a slow computer. Smaller .paf files operate more quickly than large ones.
- You have too much information to manage effectively in one .paf file.
- You maintain .paf files for individuals who are not related to you.
- You prefer to keep one .paf file for “proven” research, and another for research in progress.
- You want to be able to view and print reports based on all of your information.

## *Storing family lines in one .paf file*

Store different family lines in one .paf file on your hard drive if:

- You have a fast computer.
- You can effectively manage all of your information in one .paf file.
- You store your information on a hard disk and do not want to switch from one .paf file to another.

## *Storing .paf files on floppy disks*

Sometimes, such as when you are using a computer in a Family History Center, you may need to store the .paf file on a floppy disk.

If the .paf file fits on a floppy disk, you can save that file onto the floppy disk. When you work on the .paf file, copy the .paf file onto the computer’s hard drive if possible. The .paf file will operate more quickly, and you will have less chance of damaging your file.

**Warning:** If you store the .paf file on a floppy disk, DO NOT REMOVE THE FLOPPY until you close the .paf file or exit Personal Ancestral File. Serious loss of data on the current floppy or the next floppy you insert can occur!

If the .paf file is too large to fit on a floppy disk, you will need to make a backup copy of your file. Save the backup file (.zip file) onto the floppy disk.

To work on the .paf file, restore the backup copy onto the computer's hard disk. When you finish, make another backup copy, and save it back onto the floppy disk.

### Transferring information from another program

If you use a program other than Personal Ancestral File, save your information as a GEDCOM file, and then import the information into Personal Ancestral File. If you cannot save it as a GEDCOM file, you will have to retype the information.

When you transfer information, please be aware of the following:

- Multimedia files (images, sound, and video) are not transferred through GEDCOM.
- Some genealogy programs allow you to track information that Personal Ancestral File does not display. This information may not be transferred into Personal Ancestral File, or it may be displayed in a different place.
- Run the .paf file through the Check/Repair feature to check the .paf file structure.
- Do not delete your old files until you are sure that the transfer was complete and satisfactory. You could keep them indefinitely.

### How to create a new .paf file

You can create many .paf files that contain family information. You may, for example, want to create a new file when you:

- Record information about your family for the first time.
- Split an existing .paf file into two or more separate .paf files.
- Add a GEDCOM file to a temporary file. This allows you to look at the information and correct any errors before adding it to your permanent .paf file.

#### Steps

1. From the **File** menu, select **New**. Or from the Welcome to Personal Ancestral File screen, click **New**.
2. From the Create New Family File screen, select where you want to store your file. **Tip:** You can use any folder for the .paf file, but you should not keep your data files in the program folder.
3. In the File Name field, type the name of your file. This name appears on the title bar each time you open this file
4. Click **Save**, and the Prepared By tab of the Preferences screen appears.
5. Type your name, address, and other information.
6. Make any other changes to the Preferences that you want.
7. Click **OK**.

### How to open an existing .paf file

When you open a .paf file, the information in it is available for use.

#### Steps

1. From the **File** menu, select **Open**. Or from the Welcome to Personal Ancestral File screen, click **Open**.
2. If the .paf file you want is not displayed, find the drive and folder where it is stored.

**Tip:** If you do not know where the .paf file is stored, click the Search button. The program finds all .paf files that are on your hard disk.

3. Click the file name.
4. Click **Open**.

### How to search for existing .paf files

You can have the program search for existing .paf files on your computer.

#### *Steps*

1. From the **File** menu, select **Open**, and then **Search**. Or from the Welcome to Personal Ancestral File screen, click **Search**.

**Tip:** The program searches only your hard drive. If your computer is on a network, use the Windows Find feature to search for \*.paf.

2. Click the file name.
3. Click **Open**.

### How to convert .paf files

You will need to convert the .paf files from previous versions of Personal Ancestral File and from other programs to use them in Personal Ancestral File 5.0.

- **Personal Ancestral File 2.0 to 2.31.** If you have information in versions 2.0 to 2.31, you can either (1) convert the file into Personal Ancestral File 3.0 or 4.0. Convert the resulting file to version 5.0 or (2) create a GEDCOM file, and import it into version 5.0.
- **Personal Ancestral File 3.0 and 4.0.** You must convert the .paf file before you can use it in version 5.0. During the file conversion process, you can save the converted file in a different folder and give it a different name. You can still use the original file in Personal Ancestral File 3.0 and 4.0.
- **Personal Ancestral File 2.3.1 for Macintosh.** The best way to convert Macintosh data is to create a GEDCOM file. Macintoshes operating with System 7.5 or higher can read DOS-formatted disks directly. If you have System 7.5 or higher, make the GEDCOM directly to a DOS-formatted disk. If your operating system is lower than 7.5, save the GEDCOM to a Macintosh-formatted disk; then take the disk along with a DOS-formatted disk to a local computer store. Have an employee there take the GEDCOM file from the Macintosh disk and put it on the DOS-formatted disk. You will then probably want to create a new .paf file and import the GEDCOM file into it.
- **Other programs.** You must save your information as a GEDCOM file. Then you can use the Import feature to bring the information into Personal Ancestral File. If you cannot save your information as a GEDCOM file, you will have to retype it into Personal Ancestral File.

#### *Steps*

1. From the **File** menu, select **Open**.
2. If the .paf file you want is not displayed, find the drive and folder where it is stored.

**Tip:** If you do not know where the .paf file is stored, click the Search button. The program finds all .paf files that are on your hard disk.

3. Click the file name.
4. Click **Open**.

5. When the program tells you that the file needs to be converted, click **Continue**.
6. Find the drive and folder where you want to save the converted file.
7. Type a name for the converted file, and click **Save**.
8. When the message box tells you that the file conversion is finished, click **Close**. The file opens.

### How to close a .paf file

If you do not want to use a .paf file any longer but do not wish to exit the program, you can close a .paf file. You can then work on other .paf files.

#### Steps

1. From the **File** menu, select **Close**.  
**Tip:** The program does not ask you if you want to save any changes because all changes have already been saved.
2. The program periodically asks if you want to make a backup copy. If you have made any changes to the .paf file, we recommend that you make a backup copy.  
**Tip:** On the Preferences screen, on the General tab, you set the number of times that you can close a .paf file before the program prompts you to make a backup copy. See “How to set preferences on the General tab” (p. 151).

### How to delete a .paf file

When you no longer need a .paf file, you can delete it from the hard disk or floppy disk where you store it.

When you delete a .paf file, it is a good idea to have a backup copy in case you ever want to use it again.

**Tip:** The Delete feature does not delete the multimedia files attached to the .paf file. You will have to use your operating system to delete multimedia files.

#### Steps

1. From the **File** menu, select **Delete**.
2. Find the drive and folder where the .paf file is stored.
3. Click the file name, and click **Delete**.
4. You will be asked if you are sure you want to send the file to the recycle bin. If you are sure, click **Yes**. If you are not sure, click **No**.

### How to make a backup copy

You should *always keep a backup copy of the most recent version of your file*. A backup copy can prevent you from losing all of your work if something happens to the .paf file.

Make a backup copy before you do anything that alters the .paf file, such as:

- Add or edit records in your file.
- Delete records from your file.
- Use the Match/Merge feature.
- Use the Check/Repair feature.
- Import a GEDCOM file.
- Split a .paf file.
- Combine .paf files.
- Use the Global Search and Replace feature.

Keep several backup copies on separate disks. When you make a new backup copy, simply replace the oldest backup copy. If you ever need to restore a .paf file and find that the backup copy has problems, you can restore earlier versions until you find one that works.

**Important:** When you make a backup copy of the .paf file, only the links to the multimedia files will be included. You must use your operating system to back up your multimedia files.

**Tip:** On the Preferences screen, on the General tab, you can specify the maximum number of times you can close the .paf file before the program reminds you to make a backup copy.

See “How to set preferences on the General tab” (p. 151).

### *Steps*

1. From the **File** menu, select **Backup**.

**Tip:** Some features, such as merge, allow you to make a backup copy before you proceed. If you are making a backup copy from one of these features, skip to step 2.

2. Select the drive and folder where you want to save the backup copy.
3. Type a name for your backup copy.
4. Click **Backup**, and the backup process begins.
5. A message displays when the backup is complete. Click **OK** to continue.

**Tip:** Store your backup copy on a clearly labeled floppy or other type of disk that is separate from where you store the working copy of the .paf file. That way, you will still have your backup file if the disk with your working copy is damaged.

### **How to restore a backup copy**

The easiest way to fix the .paf file if it is damaged or if you make changes that you wish to undo is to restore it from a backup copy.

If you have made any changes after you made the backup copy, those changes will not appear in the restored .paf file. Therefore, you should make a backup copy each time you make changes that you want to keep.

You can convert backup files from the following versions of Personal Ancestral File:

- **3.x to 4.x.** These files end with .bak.
- **5.0.** These files end with .zip.

**Tip:** If you have a backup copy from version 2.0 to 2.31, restore it in that version of the software. Then create a GEDCOM file, and import it into Personal Ancestral File 5.0.

### *Steps*

1. From the **File** menu, select **Restore**.
2. If the .bak file is not displayed, find the drive and folder where it is stored.
3. Double-click the file name. Or click the file name, and click **Restore**.
4. If the file you are restoring is open, the program asks you to confirm the restore action. Click **Yes** to continue.

## How to check and repair .paf files

Sometimes the .paf files can develop problems that have nothing to do with the information you type. These problems are usually caused by:

- Turning off your computer before exiting the program.
- Power failures or surges (or accidentally hitting the off switch) while you use the program.

You should protect the integrity of the .paf file by running the Check/Repair feature occasionally.

If you run the Check/Repair feature and find problems, you can follow these strategies:

- Restore a previous backup copy that does not contain the problem. See “How to restore a backup copy” (p. 22).
- Use the Repair option. Please be aware that some data may be lost, such as relationships, links to notes or sources, and so forth. See “How to check and repair .paf files” (p. 23).
- Export the records to a GEDCOM file, and then import the GEDCOM file to a new .paf file. This corrects most errors, but it will not restore the relationships and links to notes or sources that were damaged. See “How to create GEDCOM files” (p. 116).

### Steps

1. From the **File** menu, select **Check/Repair**.  
**Tip:** You should make a backup copy before you continue. To do so, click **Backup**.
2. If you want the program to automatically find and repair .paf file problems, click **Check/Repair**. Or if you want the program to simply check the .paf file, click **Check**.
3. The program saves the results of the check as a file. Specify a location and name for the file, and click **Save**.
4. If the program does not find any problems, it tells you so. Click **OK** to continue. If the program finds problems, it opens the report in a text editor.  
**Tip:** If the report is too large to be opened into a text editor, it will be opened in your word processor.

## How to split a .paf file

Some people prefer to store different ancestral lines in separate .paf files. If the .paf file has become too large, you can use the Import feature and Export feature to split it into two or more .paf files.

### Steps

1. Make a backup copy of your complete .paf file. This allows you to restore the .paf file if you make errors during this process. See “How to make a backup copy” (p. 21).
2. Decide which ancestral lines you want to move to another .paf file.
3. Use the Export feature to create a GEDCOM file containing those names. See “How to create GEDCOM files” (p. 116).
4. Create a new .paf file. Or open the .paf file where you want to import the information. See “How to create a new .paf file” (p. 19). and “How to open an existing .paf file” (p. 19).

5. Use the Import feature to put that information into the .paf file. See “How to import GEDCOM files” (p. 112).
6. Make sure all of the information imported correctly into the .paf file.
7. Delete the records that you just imported from your original .paf file.

## How to combine .paf files

To combine the information from several .paf files into one .paf file, you use the Export feature, the Import feature, and the Match/Merge feature.

### Steps

1. Open the .paf file that you want to add the information to. This will be your main .paf file when you are finished.
2. Make a backup copy of your main .paf file. This allows you to restore it if you make errors or change your mind.
3. Open the .paf file that contains the information that you want to move to your main .paf file.
4. Use the **Export** feature to create a GEDCOM file that contains the individuals that you want to move.  
**Tip:** Make sure that all of the options in the Include box are selected. This assures that you will get notes, sources, multimedia, contact information, confidential information, and so forth. See “How to create GEDCOM files” (p. 116).
5. Open the .paf file that you want to add the information to.
6. Use the **Import** feature to add the information into your main .paf file. See “How to import GEDCOM files” (p. 112).
7. If you have duplicate individuals, use the Match/Merge feature to merge them. See “Merging individual records” (p. 144).
8. If you have duplicate sources, use the Merge duplicate sources feature to merge them. See “How to merge sources and repositories” (p. 150).
9. If you need to add individuals from one .paf file into families in your main .paf file, do so. See “How to add an individual to a family” (p. 36).
10. If desired, delete the old .paf file from your computer. See “How to delete a .paf file” (p. 21).

## How to read file properties

The File Properties screen contains the following information about the .paf file:

- The file's name, location, size, and last modification date.
- The number of individuals, marriages, sources, citations, repositories, notes, user events, and multimedia files. It also lists items that have been deleted.
- The amount of space left on the disk where your file is stored.

### Steps

1. From the **File** menu, select **Properties**.
2. Review the information on the screen.
3. Click **OK**.



---

# Navigating through a .paf file

You will use three main view screens to navigate through a .paf file:

- **Family View screen.** Use this screen when you want to view an individual and his or her parents, spouse, and children. The Family View screen shows event dates and other information for each individual shown on the screen.
- **Pedigree View screen.** Use this screen when you want to see up to 5 generations of an individual's ancestry. The Pedigree View screen shows less information for each individual but more generations.
- **Individual View screen.** Use this view when you want to see a list of everyone in a .paf file. You can sort the list alphabetically by name or numerically by RIN.

## Symbols on the Family View screen and Pedigree View screen

- An asterisk (\*) next to the birth date indicates that the date shown is a christening date rather than the actual birth date.
- An asterisk (\*) next to the death date indicates that the date shown is a burial date rather than the actual death date.
- 📄 indicates that an individual has notes or sources.
- 📺 indicates that an individual has multimedia.
- 📄📺 indicates that an individual has both multimedia and notes or sources.

The Family View screen also displays which Latter-day Saint ordinances have been performed for the children:

- B means baptism.
- E means endowment.
- S means sealing to spouse. (The child must be sealed to all of his or her spouses.)
- P means sealing to parents.
- A dash (-) indicates that an ordinance does not need to be done. (Lowercase letters, such as "b," and "e," indicate that the ordinance date field contains the term "Cleared," "Submitted," or "Sub," plus a date. It means that the ordinance is not yet done.)

## How to switch from one view screen to another

You may find that you prefer to do some tasks on the Pedigree View screen and other tasks on the Family View screen or the Individual View screen.

If you switch from one view screen to another, the selected individual becomes the primary person.

If you switch to the Individual View screen, the same individual is selected.

### Steps

1. Click the **Family, Pedigree,** or **Individual** tab.
2. Or press **Ctrl+S**.

**Tip:** If an individual is linked to more than one set of parents, the primary parents will display when you switch from the Family View to the Pedigree View screen or vice versa.

## Using the Family View screen


The Family View screen displays three generations of a family. The upper-left individual is the primary person. The primary person's parents appear to the right. The primary person's spouse and children appear beneath.


The selected individual is the individual that you highlight with your cursor, regardless of the individual's position on the Family View screen.


### How to move an individual to the primary position on the Family View screen

When an individual already appears on the Family View screen, you can quickly move him or her to the primary position.

### Steps

Click the  button to move the father or mother to the primary position.

Or click the  button to move the spouse to the primary position.

Or click the  button to move a child to the primary position.

**Tip:** When this button is solid black, the child is linked to a spouse or child. When the triangle is outlined in black and gray inside, it means that the child is not linked to a spouse or children.

Or right-click the individual. Select the Move to Primary option.

### Shortcuts for the Family View screen

- To move an individual to the primary position, right-click the individual, and select the Move to Primary option. You can also press the Ctrl key and double-click an individual.
- Press the arrow keys to select different individuals.
- Press the Home key to select the individual in the primary position.
- Press the End key to select the individual in the lower right corner.
- Press the F key to move the father to the primary position.
- Press the M key to move the mother to the primary position.
- Press the C key to move a child to the primary position.

**Tip:** On the Preferences screen, on the General tab, the Use List When Navigating option determines what happens when you press the C key. If you mark Use List When Navigating, the last child who was in the primary position will appear. If none of the children has been in the primary position, the Descendancy List appears. If you do not mark Use List When Navigating, the following will happen:

- If one of the children has already been in the primary position, that child will appear.
- If none of the children has been in the primary position, the oldest child with descendants will appear.
- If none of the children has been in the primary position and none of them have descendants, the youngest child will appear.
- Press the Ctrl+Home keys to return to the home person.

## Using the Pedigree View screen

The Pedigree View screen displays up to 5 generations of an individual's ancestry. The Pedigree View screen is helpful if you have many generations in the .paf file, because it enables you to navigate easily through generations and branches of generations.

The left-most individual is the primary person. The primary person's father is above and slightly to the right. The primary person's mother is beneath and slightly to the right.

### About InfoBoxes

On the Pedigree View screen, you can specify whether you want InfoBoxes to appear beneath an individual's name. The InfoBox contains more information about that individual.

### Types of InfoBoxes

Floating InfoBoxes appear when you pause your cursor over an individual's name.

Locked InfoBoxes appear when you click an individual or highlight an individual and press the spacebar.

### Preferences for InfoBoxes

In Preferences you can specify how the InfoBoxes behave:

- You can choose whether you want floating InfoBoxes, locked InfoBoxes, both types of InfoBoxes, or no InfoBoxes.
- You can choose what information appears in each type of InfoBox.
- If you choose floating InfoBoxes, you can also choose how long you have to pause your cursor over the name before the InfoBox appears.


### How to move an individual to the primary position on the Pedigree View screen

When an individual already appears on the Pedigree View screen, you can quickly move him or her to the primary position.


### Steps

Right-click the individual. Select the Move to Primary option.

If lines of ancestors extend beyond what can be shown on the screen, the following

buttons appears: . Click these buttons to perform these tasks:

- To move the father to the primary position, click the button that appears next to one of his ancestors.
- To move the mother to the primary position, click the button that appears next to one of her ancestors.

Click the  button to move a child to the primary position. (This button appears only when the individual in the primary position has descendants.)

### Shortcuts for the Pedigree View screen

- To move an individual to the primary position, right-click the individual, and select the Move to Primary option. You can also press the Ctrl key and double-click an individual.
- Press the arrow keys to select different individuals.
- Press the Page Up key to move through the father's line.
- Press the Page Down key to move through the mother's line.
- Press the Home key to select the individual in the primary position.
- Press the End key to select the individual in the lower right corner.
- Press the F key to select the father.
- Press the M key to select the mother.
- Press the C key to select the child.

**Tip:** On the Preferences screen, on the General tab, the Use List When Navigating option determines what happens when you press the C key. If you mark Use List When Navigating, the last child who was in the primary position will appear. If none of the children has been in the primary position, the Descendancy List appears. If you do not mark Use List When Navigating, the following will happen:

- If one of the children has already been in the primary position, that child will appear.
  - If none of the children has been in the primary position, the oldest child with descendants will appear.
  - If none of the children has been in the primary position and none of them have descendants, the youngest child will appear.
- Press the Ctrl+Home keys to return to the home person.

### Using the Individual View screen

The Individual View screen displays every individual in the .paf file. On the Individual View screen, you can:

- Sort the list alphabetically by name or numerically by RIN.
- Add unlinked individuals and edit individuals.
- Add or edit an individual's notes.
- Access an individual's multimedia.
- Delete an individual.
- Highlight an individual. When you switch to the Family View screen or Pedigree View screen, that individual is in the primary position.

### How the program sorts names

When the program sorts individuals by name, it follows these conventions:

- Individuals are sorted by surname, then by given name.
- Individuals without surnames are sorted by given name. They appear at the top of the list.
- Names are sorted alphabetically according to the language that the names are in.
- If the names are recorded in nonroman characters, such as Japanese, Chinese, or Korean, the names are sorted by radical and stroke.

### How to add columns to the Individual View screen

When you add fields to the Individual View screen, select the fields that will best help you identify the individuals in the .paf file.

#### *Steps*

1. On the Individual View screen, right-click the heading.
2. If the field that you want to add appears on the list, select it. If it does not appear on the list, follow these instructions:
  - a. Select **Add or Modify Columns**.  
**Tip:** In the Possible Fields box, click the  to view the fields available under each group.
  - b. Click the field name.
  - c. In the Fields for the Template box, click the item under which the field should appear.
  - d. Click **>**.
  - e. Repeat steps b and c until you are finished.
3. Click **OK**.

### How to remove columns from the Individual View screen

You can also remove columns from the Individual View screen.

#### *Steps*

1. Right-click the heading.
2. Select **Add or Modify Columns**.
3. In the Fields for the Template box, click the field that you want to remove.
4. Click **<**.
5. Repeat steps 3 and 4 until you are finished.
6. Click **OK**.

### How to change the order of columns on the Individual View screen

You can change the order of the columns on the Individual View screen.

### ***Steps***

To use the Windows click and drag function, follow these steps:

1. Click the heading of the column that you want to move.
2. While you hold the mouse button down, move the mouse to the place where the column should appear.
3. Release the mouse button.

You can also follow these steps:

1. Right-click the heading.
2. Select **More**.
3. In the Fields for the Template box, click the field to be moved.
4. Click <.
5. In the Fields for the Template box, click the column above where the column should appear.
6. In the Possible Fields box, click the column to be moved.
7. Click >.
8. Click **OK**.

### **How to sort individuals on the Individual View screen**

On the Individual View screen, you can sort the individuals by RIN or by name.

### ***Steps***


Click the heading of the column that you want to sort by:

- To sort the list numerically by RIN, click the heading of the RIN column.
- To sort the list alphabetically by name, click the heading of the Full Name column.

### **How to resize columns on the Individual View screen**

If a column is too wide or not wide enough, you can resize it.

### ***Steps***

1. On the Individual View screen, move the mouse cursor to the left or right edge of the heading of the column that you want to resize.
2. When the cursor changes to , click the left mouse button.
3. While you hold down the mouse button, move the mouse to the left or right.
4. When the column is the correct size, release the mouse button.

### **Shortcuts for the Individual View screen**

- Press the up and down arrow keys to move the highlight bar up and down the list.
- Press the Page Up key to move to the first individual on the screen.
- Press the Page Down key to move to the last individual on the screen.
- Press the Home key to move to the first individual on the list.
- Press the End key to move to the last individual on the list.

---

# Typing diacritics and special characters

You can use different methods to input diacritics and special characters:

- If your computer and keyboard are set up to run in a particular language, you can use the keyboard as normal to input the needed characters.
- You can use the character map.
- You can press the Alt key and type the character's decimal equivalent on the 10-key pad.
- To type Japanese, Chinese, or Korean characters, you must use an Input Method Editor (IME). Many are available from various software vendors. You can also download free IMEs from Microsoft. Each IME works differently, so check the information that comes with the software for instructions.

## How to use the character map

The character map lists the available diacritics. If your computer does not contain the diacritics that you need, follow the steps below to input them.

### Steps

1. Place the cursor where you want the diacritic(s) to appear.
2. On the Individual screen or Marriage screen, click **Options**, and select **Symbol**. Or on the Notes screen, from the **Edit** menu, select **Symbol**. Or press **F7**.
3. From the Subset field, select the character set that you want to use.
4. Click the character that you want, and click **Insert**.  
**Tip:** If the character that you need is not displayed, you may need to change your preferences. On the Fonts tab, change the Dialog font to a Unicode font, such as Arial Unicode, Tahoma, Verdana, or Andale WT J. Andale WT J is available on the compact disc that the program came on. You can also download the font from the same place where you downloaded the program.
5. To close the character map, click **Close**.

## How to use the 10-key pad to type diacritics

Some people prefer to use the 10-key pad to input diacritics.

### Steps

1. Make sure that the **Num Lock** key is on.
2. Press **Alt**, and type the character's decimal equivalent on the 10-key pad. For example, to input á, press the Alt key, and type 0225.
3. Release **Alt**.

## Decimal numbers for diacritics

**Tip:** To input a character, press the Alt key, and type the decimal number on the 10-key pad. Make sure the Num Lock key is on.

Decimal	Character	Decimal	Character
0138	Š	0221	Ÿ
0140	Œ	0222	Ɔ
0154	š	0223	Ɔ
0156	œ	0224	à
0159	Ÿ	0225	á
0161	ı	0226	â
0192	À	0227	ã
0193	Á	0228	ä
0194	Â	0229	å
0195	Ã	0230	è
0196	Ä	0231	ç
0197	Å	0232	è
0198	Æ	0233	é
0199	Ç	0234	ê
0200	È	0235	ë
0201	É	0236	ì
0202	Ê	0237	í
0203	Ë	0238	î
0204	Ì	0239	ï
0205	Í	0240	ð
0206	Î	0241	ñ
0207	Ï	0242	ò
0208	Ð	0243	ó
0209	Ñ	0244	ô
0210	Ò	0245	õ
0211	Ó	0246	ö
0212	Ô	0247	÷
0213	Õ	0248	ø
0214	Ö	0249	ù
0215	×	0250	ú
0216	Ø	0251	û
0217	Û	0252	ü
0218	Ú	0253	ý
0219	Û	0254	þ
0220	Ü	0255	ÿ



---

# Adding individuals and families

You will store information about individuals and families in two types of records.

## *Individual records*

Each individual in a .paf file has one individual record. Individual records contain the following information:

- The individual's name and sex.  
**Tip:** If you use nonroman characters, such as Chinese, Japanese, or Korean, you can add fields for a phonetic representation of the name and a romanized version of the name.
- Information about his or her birth, christening, death, and burial.
- Information for the Latter-day Saint ordinances of baptism, endowment, and sealing to parents.
- Other miscellaneous information, such as nickname, married name, alias, and so forth.
- Events and attributes that you add. For example, you can add information about military service, emigration, naturalization, and so forth.
- Notes, sources, and links to multimedia files.
- A record identification number. The program assigns each individual record a record identification number (RIN). This number is used to distinguish that individual record from all others in the .paf file. You cannot edit the RIN.

A unique record serial number. Like a record identification number (RIN), a unique record serial number identifies each individual in a .paf file. Unlike a RIN, a unique record serial number is unique worldwide. This means that each individual in each of the .paf files has a different number than other individuals in all other .paf files that are made worldwide.

The number does not change if you export a GEDCOM file and send it to another person. Therefore, you can send a GEDCOM file to another individual, he or she can import it into Personal Ancestral File, make changes to it, create another GEDCOM file, and send it back to you. You can then use the Match/Merge feature to identify the records that you originally created, identify what changes the other person made, decide which information to keep, and merge the records.

You cannot see a unique serial number on the Individual screen, and you cannot edit it.

## *Marriage records*

When you link individuals into families, the program creates marriage records. Marriage records contain:

- The couple's marriage date and place.
- LDS sealing information.
- Whether the couple divorced.

- Events and attributes that you add. For example, you can add information about engagement, marriage banns, and so forth.
- The RINs of family members. This means that even if a couple never married, you must create a marriage record to link their children to them.
- Notes and sources.
- A marriage record identification number (MRIN).

### **Guidelines for adding individuals**

- Type each individual's information only once.
- Type an individual's name in the order that it is spoken. Type one slash mark (/) at the beginning of the surname and one at the end.
- Type surnames in uppercase and lowercase letters. Do not type them in all uppercase letters.
- Type as much information as you know about an individual. You can later add more information as you find it or as events occur in your family.
- Be consistent in the way you type names, dates, places, and ordinance information. Avoid abbreviations.
- You can add notes and sources to individual records and marriage records.
- You can add multimedia files to individual records and to sources.

### **Using the Full Name field**

Previous versions of the program had separate fields for given names and surnames. The program now has a Full Name field where you type both given names and surnames. The Full Name field better accommodates naming traditions that are used worldwide and that have been used historically.

To allow the program to sort individuals by surname, the surname must be marked with slash marks (/). (In other words, one slash must appear at the beginning of the surname and one at the end of the surname.) The program can insert the slash marks for you, or you can type them.

When you type a name, the program asks you to verify that the name is correct and that the surname has been correctly marked with slash marks.

The verification screen has a Don't Show This Message Again option. Mark the option if you do not want to see the screen. You can also turn this feature on or off on the Preferences screen, on the Names tab.

See "How to set preferences on the Names tab" (p. 154).

### **Handling unknown spouses**

When the word "Unknown" appears instead of a spouse's name, it means that the individual is linked to a marriage record but not to a spouse's individual record. This happens when you:

- Unlink or delete an individual's spouse.
- Add a child to an individual who is not linked to a spouse.
- Add an individual and his or her marriage record but do not add a spouse. This can be somewhat confusing, especially if you need to change the sex of an individual linked to an unknown spouse. To do this, you must delete the marriage record. However, if you delete the marriage record, the individual's children will be unlinked from him or her.

To find “unknown” spouses in the .paf file, you can use one of these strategies:

- Find the couple on the Marriage List. Look for a marriage where one or both spouses are missing. See “How to find a couple” (p. 99).
- Print a list of marriages. Look for a marriage where one or both spouses are missing. See “How to print lists” (p. 132).

**Important:** Do not type the word “Unknown” in the name field when adding an individual, because this actually creates an individual record. If you want to submit a couple for sealing but do not know the wife’s name, you can add an individual record for her. In the Full Name field, type Mrs. and her husband’s surname, for example, Mrs. William Arthur /Smith/.

## Preference options that affect how records are added

The Preferences screen has several options that affect how the Add process works.

### *General tab*

You can select:

- Whether the fields for LDS ordinances appear.
- Whether the program automatically displays the Marriage screen after you add an individual’s spouse.
- Whether you press the Tab key or Enter key to move the cursor from field to field on the Individual and Marriage screens.
- Whether you can edit Ancestral File numbers (AFNs).

### *Names tab*

You can select:

- Whether the program automatically marks the surname with slashes and which part(s) of the full name will be marked as the surname.
- Whether the program asks you to verify that the surname has been marked correctly.
- Whether you want the program to display and print surnames in all uppercase letters.

### *Fonts tab*

You can select the font used on the Individual and Marriage screens. (To change the font on screens, select the Dialogs option.)

### *Formats tab*

You can select how the program interprets dates that you type in all numbers. For example, if you select U.S., 4/8/1845 means 8 April 1845. If you select European, the same date means 4 August 1845.

### *Templates tab*

You can select what fields appear on the Individual and Marriage screens.

### How to add an individual to a family

As you add an individual to the .paf file, you often already have his or her father, mother, spouse, or child in the file. If you already have a family member in the .paf file, you can add the new individual and link him or her into the family at the same time.

**Tip:** You cannot add an individual to a family when you are on the Individual View screen.

#### Steps

1. From the Family View screen or Pedigree View screen, select the individual whose family you want to add.
2. From the **Add** menu, select the option you want. Or from the toolbar, click **Add Individual**, and select the option you want. Or double-click the empty place where the individual's information should appear.

3. If the individual is not in the .paf file, click **Add New Individual**, and type the information about him or her. Or if the individual is in the .paf file, click **Select Existing Individual**, and find the individual's record.

**Tip:** If a downward-pointing triangle appears at the right side of the field, it means that you can select from a list of dates or places that you added to previous records. To view the list, click the field, press the **F4** key, or press the **Alt+down arrow** keys.

4. If you want to use a different template, select it from the Template drop-down box.

**Tip:** If you select a different template, that template is displayed while you add the record. When you edit the record, the default template is displayed. If the default template does not contain a field that was on the template that you used to add the individual, the information in the field will not be displayed. If you select a template that has the field, you will see the information.

### How to add an individual who is not linked into a family

When you add unlinked individuals to the .paf file, you can do the following types of tasks:

- Add many individuals, and then link them as you find the relationship information.
- Specify which record in your file has RIN 1. (The first individual that you add will have RIN 1.)
- Keep track of an individual who you believe is related to you but for whom you have no family information. (When you find the family information, you can link the individual into the appropriate family.)
- Create a file of unrelated individuals. You can use this as an index to a particular set of records or individuals.

#### Steps

1. From the **Add** menu, select **Individual**.
2. Type information about the individual in the appropriate fields.

**Tip:** If a downward-pointing triangle appears at the right side of the field, it means that you can select from a list of dates or places that you added to previous records. To view the list, click the field, press the **F4** key, or press the **Alt+down arrow** keys.

3. If you want to use a different template, select it from the Template drop-down box.

**Tip:** If you select a different template, that template is displayed while you add the record. When you edit the record, the default template is displayed. If the default template does not contain a field that was on the template that you used to add the individual, the information in the field will not be displayed. If you select a template that has the field, you will see the information.

4. If you want to, add notes, sources, and multimedia.
5. Click **Save**.

## How to add a family

If you know who all or most of the individuals in a family are, the program can guide you through the process of adding and linking them. It lets you add the father, then the mother, their marriage information, and each of the children.

**Tip:** You cannot add a family when you are on the Individual View screen.

### Steps

1. From the **Add** menu, select **Family**.
2. If the father is not in the .paf file, click **Add New Individual**, and type the information about him. Or if the father is in the .paf file, click **Select Existing Individual**, and find his record. Or if the father is not known, click **Unknown**.  
**Tip:** If you want to use a different template, select it from the Template drop-down box. If you select a different template, that template is displayed while you add the record. When you edit the record, the default template is displayed. If the default template does not contain a field that was on the template that you used to add the individual, the information in the field will not be displayed. If you select a template that has the field, you will see the information.  
**Tip:** If a downward-pointing triangle appears at the right side of the field, it means that you can select from a list of dates or places that you added to previous records. To view the list, click the field, press the **F4** key, or press the **Alt+down arrow** keys.
3. Repeat step 2 for the mother.
4. Add the marriage information.
5. If the child is not in the .paf file, click **Add New Individual**, and type the information about him or her. Or if the child is in the .paf file, click **Select Existing Individual**, and find his or her record.
6. After you add a child, the program asks if you want to add another. To add another child, click **Yes**, and repeat step 5 for the next child. Otherwise, click **No**.

## How to add a marriage record

Marriage records link individuals into families. They also store a couple's marriage and Latter-day Saint sealing information.

**Tip:** You cannot add a marriage record when you are on the Individual View screen.

### Steps

1. On the Family View screen or the Pedigree View screen, move the individual whose marriage record you want to add to the primary position.
2. From the **Edit** menu, select **Marriage**. Or on the Family View screen, you can double-click the marriage information.
3. Type the information about the marriage.

- If the couple did not marry but had children together, type **Not Married** in the Marriage Date field.  
**Tip:** If a downward-pointing triangle appears at the right side of the field, it means that you can select from a list of dates or places that you added to previous records. To view the list, click the field, press the **F4** key, or press the **Alt+down arrow** keys.
  - For some Temple and Confidential fields, you must select one of the options on the list.
  - For place-names, you can type any place-name that you need. The program adds new ones to the list. To retype a place-name, you can simply select it from the list. Or you can begin typing the name. The program will match what you type to the options that are on the list. If it finds one that matches, the name will appear in the field. If it is the correct name, you can move to the next field without typing the rest of the name. If it is not the correct name, finish typing the name.
  - Unused place-names and dates eventually drop off the list. To delete a place-name or date before then, highlight the option, and press the **Delete** key.
  - If you want to use a different template, select it from the Template drop-down box. If you select a different template, that template is displayed while you add the record. When you edit the record, the default template is displayed. If the default template does not contain a field that was on the template that you used to add the individual, the information in the field will not be displayed. If you select a template that has the field, you will see the information.
4. If you want, add notes and sources.

## Using ditto features

When you use ditto features, you copy information that you typed previously into another place.

You can ditto information in two ways:


- Use ditto.
- Use the Cut, Copy, and Paste commands.

### How to use ditto

As you type dates and places, the program adds them to a list. Later, if you do not want to retype the same date or place, you can select it from the list.

Unused place-names and dates eventually drop off the list. To delete a place-name or date before then, highlight the option, and press the Delete key.

### Steps

1. Move the cursor to a date or place field.
2. To display the list of dates or places that you can copy, click , which appears at the right edge of the field. Or press **F4**. Or press **Alt+down arrow**.
3. Select the option that you want.  
**Tip:** When you type a date or place that matches an option that is on the list, the program displays it in the field. If the date or place is correct, you can simply move to the next field, and the complete date or place will automatically be added to the field. If it is not correct, continue to type. The new date or place will be added to the list, so that you can use it another time.

## How to use Cut, Copy, and Paste

If a ditto feature is not available, you can use the Cut, Copy, and Paste commands to copy information that you have already typed.

### Steps

1. Highlight the text you want to copy.
2. To cut the text, press **Ctrl+X**. To copy the text, press **Ctrl+C**. Or right-click, and select either **Cut** or **Copy**.
3. Put the cursor where you want the text to appear.
4. Press **Ctrl+V**. Or right-click, and select **Paste**.

**Tip:** You can copy information from one place of a record to another place in the same record, from one record to another record, or from a record in one .paf file to a record in another .paf file.

## Linking individuals to multiple spouses

You can link an individual to up to 60 spouses. However, the Family View screen and Pedigree View screen display one spouse at a time. The first time you display an individual, his or her default spouse appears.

Unless you change the default spouse, the program uses the first spouse who was linked to the individual. To select a different default spouse, you must change the order of the spouses.

If you do not want to change the default spouse, you can view another spouse temporarily. The program displays that spouse until you view a different spouse, change to another view screen, or exit the program.

## How to link an individual to another spouse

When an individual marries more than once, you can link that individual to all of his or her spouses.

If a couple divorced and then remarried, you can also link an individual to the same spouse more than once.

### Steps

1. On the Family View screen or Pedigree View screen, highlight the individual.
2. From the **Add** menu, select **Spouse**.
3. If the individual is not in the .paf file, click **Add New Individual**, and type the information about him or her. Or if the individual is in the .paf file, click **Select Existing Individual**, and find the individual's record.

**Tip:** If a downward-pointing triangle appears at the right side of the field, it means that you can select from a list of dates or places that you added to previous records. To view the list, click the field, press the **F4** key, or press the **Alt+down arrow** keys.

**Tip:** When you select a spouse who has already been linked to that individual, the program asks if you want to add another marriage record. If this couple divorced and then remarried, click the **Yes** button, and add the marriage record.

### How to display another spouse on the Family View screen temporarily

You can link an individual to up to 60 spouses. However, the Family View screen displays only one at a time.

When you link an individual to more than one spouse, the program lists the spouses in the order that they were added to the family. When you begin a work session, the first spouse on the list is displayed. The Other Marriages button appears to inform you that the individual has other spouses.

**Tip:** The Other Marriages button appears only when an individual is in the primary position.

If you click the Other Marriages button you can view a different spouse. This spouse will appear until you select a different spouse, change to a different view screen, or exit the program. The next time you use the .paf file, the first spouse appears.

**Tip:** To permanently change the spouse that appears, you have to change the order of the spouses.

#### Steps

1. On the Family View screen, click **Other Marriages**.
2. On the Other Marriages screen, click the spouse that you want to display.
3. Click **OK**.

### Linking individuals to multiple parents

You can link an individual to up to 5 sets of parents. However, the Family View screen and Pedigree View screen display one set of parents at a time. The first time you display an individual, the program displays the primary parents.

Unless you change the primary parents, the program uses the first parents who were linked to the individual. To select different primary parents, you must change the order of the parents.

If you do not want to change the primary parents, you can view other parents temporarily. The program displays those parents until you view different parents, change to a different view screen, or exit the program.

**Tip:** When an individual is linked to more than one set of parents, the Family View screen shows the parent link if it is something other than biological. If you do not see a parent link listed, the relationship is considered biological.

### Displaying stepchildren and adopted children

You can link a child to more than one set of parents. This is particularly useful if:

- An individual who has children marries another individual.
- You want to link a child to more than one set of parents, such as the biological parents and adopted parents.

In the .paf file, you can handle these situations in one of two ways. Each has advantages and disadvantages. No matter which method you use, you will probably want to add a detailed explanation in the notes.

- **Link each child to his or her birth parents.** If you do this, the .paf file will accurately reflect the children's relationships to each other and to their parents. However, the Family View screen will not display all of an individual's children together. You will have to display the other spouse to see the other children. You will also have to print separate family group records for each family.



- **Link all of the children to one set of parents.** If you do this, you can use the Parent Link feature to indicate that the children are not biological. However, you can select only one parent link for each set of parents. You cannot select one for the father and another one for the mother. If you link all of the children to one set of parents, the .paf file will not accurately reflect the relationships that the children have to their parents and step-parents. However, you will be able to see all of an individual's children together on the Family View screen and print them all on one family group record.

### How to link a child to another set of parents

You can link a child to more than one set of parents to show adoptive, foster, sealing, and other types of lines.

However, because the Pedigree View screen and Family View screen can display only one set of parents, you must choose one set to be primary. When an individual is linked to more than one set of parents, the Other Parents button appears on the Family View screen. Click it to view another set of parents and their ancestry.

When you link an individual to more than one set of parents, be aware of the following:

- If the parents you prefer to see do not appear by default on the screen, you need to use the Parents screen to change the primary parents.
- The default parent link is biological for the first set of parents and adopted for all others. If that is not correct, use the Parents screen to change it.
- The Individual screen normally displays Latter-day Saint sealing-to-parents information. When you link an individual to more than one set of parents, the Individual screen displays only the sealing information for the primary parents. You can add sealing information for other parents on the Parents screen.

### Steps

1. On the Family View screen or Pedigree View screen, select the individual whose parents you want to add.
2. From the **Edit** menu, select **Parents**.  
**Tip:** The Parents option is available only if the individual is already linked to parents.
3. Click **Add**. The Add Parent screen appears.
4. If both parents are already in the .paf file and they are linked as spouses, click **Select Existing Parents**, and find the parents. Or click the appropriate button on the screen to add or find the father and mother.
5. If needed, select a different type of Parent Link.
6. If needed, type the Latter-day Saint sealing information.  
**Tip:** On the Family View screen, the Other Parents button appears above the parents. Click it to display another set of parents.

### How to specify the primary parents

The primary parents appear by default when you open the .paf file.

**Tip:** To view another set of parents and their ancestry temporarily, click the Other Parents button.

### *Steps*

1. On the Family View screen or Pedigree View screen, select the child.
2. From the **Edit** menu, select **Parents**.
3. Click the parents who should be the primary parents.
4. Click **Make Primary**.
5. Click **OK**.

### **How to change the parent link**

The parent link describes the relationship of a child to his or her parents. You can choose only one parent link for both parents. For example, you cannot choose “biological” as the parent link for the father and “adopted” for the mother.

The default parent link is biological for the first set of parents and adopted for all others. If that is not correct, use the Parents screen to change it.

### *Steps*

1. On the Family View screen or Pedigree View screen, select the child.
2. From the **Edit** menu, select **Parents**.
3. From the Parent Link box, select the option that most accurately reflects the relationship.

**Tip:** You might want to add an explanation in the notes.

### **How to display another set of parents temporarily**

You can link an individual to up to 5 sets of parents. However, the program can only display and print one set of parents at a time. Therefore, it must choose one set of parents to display by default. This set of parents is called the “primary parents.”

When you display another set of parents temporarily, those parents display until you:

- Change from one view screen to another. For example, switch from the Family View screen to the Individual View screen.
- Display a different set of parents.
- Exit and restart the program.

### *Steps*

1. From the **Add** menu or the **Edit** menu, select **Parents**. Or from the Family View screen, click **Other Parents**.
2. Click the parents that you want to display.
3. Click **OK**.

### **How to add sealing-to-parent information**

You can add sealing-to-parent information on two screens in the program:

- If an individual is sealed to one set of parents, type the sealing-to-parent information on the Individual screen.
- If an individual is sealed to more than one set of parents, type the sealing-to-parent information on the Parents screen, as described below.

### **Steps**

From the Family View screen or Pedigree View screen, select the individual whose sealing-to-parents information you want to add.

1. From the **Edit** menu, select **Parents**.
2. Click the parents whose sealing information you want to add.
3. Type the sealing date.
4. Select the temple.

**Tip:** Click the **S** button to add a source for the sealing.

### **Guidelines for names**

#### ***General guidelines***

- Type the individual's full name in the order that you would speak it.
- Type suffixes, such as Junior, Senior, or III, after the surname.
- If a woman adopted her husband's surname after marriage, type her maiden name.
- Type titles in the Title (Prefix) field.
- Type nicknames in the Nickname field.
- Type stage names, pen names, criminal aliases, and other names the individual may have used in the Also Known As field.
- Do not type tribes, clans, and similar information in the Full Name field. Instead, add a custom event or attribute, and type the information in that field. See "How to add a custom event or attribute to the Individual or Marriage screen" (p. 56).

#### ***Slashes***

A slash mark (/) must appear before and after the surname. The slashes help the program sort the names on lists and allow names to transfer correctly to other computer programs. On the Preferences screen, on the Names tab, you can specify whether you want the program to automatically add the slashes for you.

See "How to set preferences on the Names tab" (p. 154).

If an individual does not have a surname, you do not need to put any information between the slashes.

**Tip:** If the program adds slashes for you automatically, it adds // to the name. You can either leave these slashes as they are, or you can delete them.

### **Guidelines for event dates**

#### ***Gregorian calendar (Western calendar)***

Type as much of the date as you know in day, month, year format. For example:

23 Mar 1742

Dec 1845

1799

**Tip:** You can also type all numbers, such as 3/11/1955. On the Preferences screen, on the Formats tab, you can select whether the program interprets this date as 11 March 1955 or 3 November 1955.

If you are not sure on what day or during what year an event occurred, type a slash mark (/) between the two days or years. For example:

14/15 May 1854

28 Apr 1721/1722

**Tip:** If you use a slash mark, be sure to put an explanation in the notes. If you submit a date with a slash mark to Ancestral File, TempleReady, or Pedigree Resource File, only the first day or year will be used.

See “What is the Gregorian calendar?” (p. 166).

If an event covers a range of dates, put both dates in the field. Use the words “from” and “to” to separate the dates. For example:

From 10 Sep 1867 To 17 Aug 23 1869

### ***Other calendars, feast dates, and nonconventional dates***

Type the information that you know.

Personal Ancestral File accepts dates from the Gregorian calendar and Japanese Emperor dates as standard dates. If you type anything else, the program warns you that you have just typed a nonstandard date. If you click OK and then move the cursor out of the field, the program accepts the date as you typed it.

### ***Approximate dates***

Type one of the following words or abbreviations to indicate that the date is not exact:

About or Abt

Before or Bef

After or Aft

Estimated or Est

### ***Calculated dates***

You may calculate a date, such as a birth date, when you know the date of an event and the individual's age at the time of the event. For example, if the 1860 United States census shows that an individual is two years old, you may calculate the birth date to be 1858. To indicate the calculation, type **Cal** before the year.

Cal 1858

If you obtain information from another computer program, you may see calculated dates in brackets.

<1854>

### ***No death date***

If you know that an individual died but have no death date, you should leave the field blank.

**Tip:** If an individual died within the last 100 years and if you want to submit his or her name for Latter-day Saint temple ordinances, you can type Dead or Deceased if you do not know an exact death date. An exact date is preferred, if you can find one.

### ***No death date***

If you know that an individual died but have no death date, you should leave the field blank.

**Tip:** If an individual died within the last 100 years and if you want to submit his or her name for Latter-day Saint temple ordinances, you can type **Dead** or **Deceased** if you do not know an exact death date. An exact date is preferred, if you can find one.

### ***Individuals who died as infants or children***

If you know that an individual died as an infant or child but do not have a death date, you can type one of the following in the Death Date field:

Chi or Child

Sti or Stillborn

Inf or Infant

**Tip:** If submit individuals for Latter-day Saint temple ordinances, do not type **Sti** or **Stillborn** unless you know that an infant was born dead. Since a stillborn child needs no temple ordinances, Personal Ancestral File does not submit individuals with **Sti** or **Stillborn** in the Death Date field.

### ***B.C. dates***

If a date occurred before the birth of Christ, type the date, and then type **BC**.

### ***Unmarried couples***

If a couple did not marry, you can type **Not married** in a marriage date field.

## **Guidelines for event places**

### ***General guidelines***

Type place-names as completely as possible. Include all government levels. For example:

Chicago, Cook, Illinois

Dellwig, Westfalen, Preussen

In many languages, it is customary to type commas between the government levels. If you do not know one or more of the levels, type an extra comma to indicate that a part of the place-name is missing, such as an unknown county name. This will help you use field filters correctly to find all records from a certain place. For example:

Hendersonville, , North Carolina

Rheydt, , Preussen

Do not use postal or other abbreviations—these are often misinterpreted.

Type the place as it existed when the event occurred. If the place-name has changed since then, you can add an explanation to the notes.

If you plan to submit names for Latter-day Saint temple ordinances, include the U.S. state, Canadian province, or country name.

### ***Assumed places***

You may assume places of birth based on a place where one member of a family was born, died, or lived at some time, or where the husband and wife were married. This place can be used as a probable place of birth for other members of the family.

It is common to type the word “of” before an assumed place. However, if you do this and later print a Place List, all place-names in which you type “of” will sort with the letter “O.”

### ***Cemetery and hospital names***

Some individuals keep track of the cemeteries where their ancestors are buried and the hospitals where they were born or died. You can put this information in a place field, but you should preferably put it in the notes or in a custom event or attribute.

### ***Landmarks, farm names, and so forth***

Sometimes, especially when dealing with rural areas, you may find a landmark, farm name, or other description instead of or in addition to a town or city name. You can include this information in the place-name:

Crawfish Creek (near Chattanooga), Marion, Tennessee, USA

### ***Nomadic or tribal peoples***

Boundaries on political maps may not correspond to those accepted by nomadic or tribal peoples, such as native peoples and gypsies. In such cases, provide as complete a place-name as you can, or type the name of a place that was nearby.

Include a detailed explanation in the notes. You can also include tribes, clans, ancestral homes, clan seats, and other similar information as other events and attributes.

### ***Parishes and religious jurisdictions***

When you obtain information from church records, the place information may reflect the ecclesiastical (religious) jurisdiction rather than the governmental jurisdiction. Type the ecclesiastical jurisdiction. For example, if a christening occurred in a parish named St. Martin, you might want to type the parish name instead of a city name, as follows:

St. Martin, Salisbury, Wiltshire

## **Guidelines for Latter-day Saint ordinance information**

### ***Ordinance dates***

If you know the date, type it in day, month, year format. Use the Gregorian calendar. See “What is the Gregorian calendar?” (p. 166).

If you do not know the date, you can type **Completed** or **Done**. This prevents the names from being submitted again.

If an ordinance has been submitted but not yet completed, type **In Process**, **Submitted**, **Sub**, **Cleared**, or **Cle**. This prevents the names from being submitted again.

If an ordinance was submitted but not cleared, you can type **Uncleared** or **Unc**. This prevents the names from being submitted again.

### ***Temple codes and places***

In the Temple fields, type or select the temple code. For baptisms, select a temple code only if the baptism was performed by proxy.

In the Baptism Place field, type the place only if the baptism was performed while the individual was alive. For proxy baptisms, leave the Baptism Place field blank.

### ***Children who died before age 8***

If a child died before age 8, you can type **Infant, Inf, Child,** or **Chi**. This prevents the name from being submitted for those ordinances.

If a child was stillborn, you can type **Stillborn** or **Sti**. This prevents the name from being submitted for those ordinances.

### ***Born in the covenant***

If a child was born in the covenant, type **BIC** in the Sealing to Parents field. This prevents the name from being submitted for a sealing to parent.

### ***Baby blessings, priesthood ordinations, and other ordinances***

Add baby blessings, priesthood ordinations, and other Latter-day Saint ordinance information as custom events and attributes. Do not type dates of baby blessings in the Christening field.

See “How to add a custom event or attribute to the Individual or Marriage screen” (p. 55).

### ***Pre-1970***

In ordinance date fields, use this code to indicate that the ordinance was done before 1970. You should usually not type this code in ordinance date fields if you can find an exact date instead. You may, however, see this code on records that you download from the Ordinance Index.

### ***Sealings***

If a sealing should not occur, type **DNS** in the sealing date field.

If a sealing was cancelled, type **CAN** or **Cancelled** in the sealing date field.

If both a sealing was cancelled and you wish to indicate that it should not be redone, type **DNS/Can** in the sealing date field.

---

# Editing individuals and marriages

When you find errors or want to add new information to a record, you need to edit the record.

You can use several features to make global changes to the .paf file:

- To change names that are typed in all uppercase letters, use the Change Names to Mixed Case feature.
- To change place-names, use the Global Search and Replace feature.
- To make global changes to other types of information, use the Advanced Focus/Filter feature to find the records. You can use that feature to edit the records.

## How to edit individual records

As you learn more about your ancestors or as events such as deaths occur in your immediate family, you will need to correct or add to the information in the .paf file.

### *Steps*

1. Find the individual you want to edit.
2. On the Family View screen, the Pedigree View screen, or the Individual View screen, double-click the individual.
3. Make all needed changes to the record.  
**Tip:** To delete information, simply highlight it and press the Delete key or Backspace key.
4. Click **Save**.

## How to edit marriage records

As you learn more about your ancestors or as marriages, sealings, and divorces occur in your immediate family, you will need to correct or add to the information in the .paf file.

**Tip:** You cannot edit a marriage record when you are on the Individual View screen.

### *Steps*

1. On the Family View screen or the Pedigree View screen, find the couple whose marriage record you want to edit. Or on a screen that has an Edit button for a marriage, click **Edit**.
2. From the **Edit** menu, select **Marriage**. Or if you are on the Family View screen, double-click the marriage information.
3. Make all needed changes to the record.  
**Tip:** To delete information, simply highlight it and press the Delete key or Backspace key.
4. Click **Save**.



---

# Changing the order of children, parents, and spouses



The order in which children, parents, and spouses are listed affects how the program works.

- **Children.** The order of children affects how they are displayed on screens and printed on reports.
- **Spouses.** The first spouse listed appears by default when you use a .paf file. To have another spouse appear by default, you must change the order of the spouses.
- **Parents.** You can link an individual to more than one set of parents to show adoptive, foster, sealing, and other types of lines. By default, the program displays the first set of parents when you open the .paf file. If you want another set of parents to appear by default, you must change the order of the parents. Make sure the parents you want to appear by default appear first on the list. The first parents on the list are also called the “primary parents.”

## How to change the birth order of children

By default, the program lists children in the order in which they are typed. Children will appear in the order of birth only if you type them in that order or change them to that order.

### *Steps*

1. On the Family View screen, move the individual (whose children you want to rearrange) to the primary position.
2. From the **Edit** menu, select **Order Children**.
3. On the Child Order screen, select the child you want to place in a different order.
4. Click  or  to move the child to the correct order in the list.
5. Repeat steps 3 and 4 until all children are in the proper order.
6. Click **OK**.



## How to change the order of spouses

On the Family View screen and Pedigree View screen, the program displays the first spouse by default. If you want to see a different spouse by default, you need to change the spouse order.

**Tip:** To view another spouse temporarily, click the Other Marriages button, and select the spouse you want.

### *Steps*

1. On the Family View screen, display the individual whose spouses you want to rearrange.
2. From the **Edit** menu, select **Order Spouses**.
3. On the Spouse Order screen, click the spouse that you want to move.



4. Click  or  to move the spouse to the correct position in the list.
5. Repeat steps 3 and 4 until all spouses are listed in the order that you want.
6. Click **OK**.

### How to change the order of parents

You can link an individual to more than one set of parents to show adoptive, foster, sealing, and other types of lines. However, because the program displays and prints one set of parents at a time, you must choose one set to be the primary parents. The primary parents appear by default when you open the .paf file.

**Tip:** To view another set of parents and their ancestry temporarily, click the Other Parents button.

#### *Steps*

1. On the Family View screen or Pedigree View screen, select the child.
2. From the **Edit** menu, select **Parents**.
3. On the Parents screen, click the parents that you want to change.
4. Click  or  to move the parents to the correct position in the list.  
**Tip:** The parents marked with an asterisk (\*) are the primary parents.
5. Repeat steps 3 and 4 as needed until all parents are listed in the order that you want.
6. Click **OK**.

---

# Removing individuals from families

When you remove (unlink) an individual from a family, the individual record remains in the .paf file.

**Tip:** When you unlink an individual from a set of parents, the parents stay linked to each other as spouses, and all of their other children are still linked to them.

Be aware of the following:

- When you unlink a child from a family, the rest of the family stays linked.
- If you delete a marriage record, all family members will be unlinked.
- If you unlink a spouse but do not delete the marriage record, the word “Unknown” appears where the spouse’s name would appear. The word “Unknown” is simply a marker. The .paf file does not contain an individual record for the unknown individual.
- To delete the word “Unknown,” you must delete the marriage record. However, this also unlinks the children from the remaining parent. See “How to delete a marriage” (p. 53).

## How to remove an individual from a family

If you find an individual who should not be in a family, you can remove him or her from the family. You do not need to delete the individual unless he or she does not belong in the .paf file at all.

### *Steps*

1. On the Family View screen, click the individual you want to unlink.  
**Tip:** You cannot unlink the primary person. Instead, you must move the individual to the father, mother, spouse, or child position.
2. From the **Edit** menu, select **Unlink Individual**.
3. The program displays a warning message. If you are sure you want to unlink this individual from the relationship, click **OK**.

## How to unlink an individual from a set of parents

If an individual is linked to more than one set of parents, you must go to the Parents screen to unlink them.

**Tip:** If you follow this process, the parents remain linked as spouses. All of their other children remain linked to them.

### *Steps*

1. On the Family View screen or Pedigree View screen, click the individual whose parents you want to unlink.
2. From the **Edit** menu, select **Parents**.
3. From the Parents screen, click the parent(s) that you want to unlink.

4. Click **Unlink**.
5. The program displays a warning message. If you are sure you want to unlink these parents from the child, click **OK**.

---

# Deleting individuals

When you incorrectly add individuals to a .paf file, you can delete them. When you delete individuals from a .paf file, they are removed from all families where they are linked.

**Tip:** If you want to delete a group of records, such as everyone in a particular ancestral line, you can use the Advanced Focus/Filter feature to create a focus list of everyone that you want to delete. You can then delete them all at once.

See “How to create a focus list” (p. 100).

## How to delete an individual

When you delete an individual, that individual will no longer be in the .paf file.

### *Steps*

1. From the Family View screen, Pedigree View screen, or Individual View screen, select the individual that you want to delete.
2. From the **Edit** menu, select **Delete Individual**.
3. The program displays a warning that lists the number of marriages linked to the individual you are attempting to delete. To delete the record, click **OK**. Or if you are unsure about deleting the record, click **Cancel**.

## How to delete a marriage

When you delete a marriage record, the following information is deleted:

- All of the information on the Marriage screen.
- The link between the spouses.
- The link between the parents and children.
- If the individuals are not linked to other families, they remain in the .paf file as unconnected individuals.

**Tip:** If the program puts the word “Unknown” where the spouse’s name should appear, it means that an individual is linked to a marriage record but not to a spouse. If you do not want the word “Unknown” to show, you must delete the marriage record.

### *Steps*

1. From the Family View screen or Pedigree View screen, select the individual whose marriage you want to delete.  
**Tip:** If both spouses are listed as “Unknown,” select the child. If no children are linked to the marriage, use the Marriage List to find the couple and display them on the screen. See “How to find a couple” (p. 99).
2. To delete the primary person’s marriage record, from the **Edit** menu, select **Marriage**. To delete the parents’ marriage record, from the **Edit** menu, select **Parents’ Marriage**.  
**Tip:** On the Family View screen, you can double-click the primary person’s marriage information.

3. From the Edit Marriage screen, click **Delete**.
4. To delete the marriage record, click **OK**. If you are unsure about deleting the record, click **Cancel**.

---

# Using custom events and attributes

If the Individual and Marriage screens do not contain a field that you need, you can add it as a custom event or attribute. For example, you can add fields for adoptions, bar mitzvahs, engagements, marriage banns, military service, and so forth. When you add a custom event or attribute, you can choose from a list of predefined custom events or add your own.

You can include dates, places, and other information. You can also specify that the information should be kept confidential.

You can use custom events and attributes in the following ways:

- You can print them on family group records, ancestry wall charts, descendancy wall charts, books, individual summaries, and custom reports.
- You can include them on web pages.
- You can create focus lists based on them. For example, if you added an Immigration event, you could create a focus list of everyone who immigrated during a particular year on a particular ship. This type of focus list is very difficult to create if the immigration information is in the notes.

**Tip:** If you use the same custom events and attributes on every screen, you can create a template. Templates are customized Individual and Marriage screens. When you create a template, you can specify which events, including custom events and attributes, appear on the screen by default.

## How to add a custom event or attribute to an Individual or Marriage screen

If the Individual or Marriage screen does not contain a field that you need, you can add a custom event or attribute.

**Tip:** If you use the same custom event on many individuals or marriages, create a template (a customized screen) for the Individual and Marriage screens. The custom event will appear on the screen, and you will not have to add it to each separate individual or marriage record.

### *Steps*

1. Display the Individual or Marriage screen that you want to add the event or attribute to.
2. Click **Options**.
3. Select **New Event/Attribute**.
4. If the event or attribute is on the list, click it, and click **Select**. If the event or attribute is not on the list, click **New** to add it to the list.

**Tip:** You can add the same event or attribute as many times as needed. For example, if an individual had more than one alias, you can type one of them in the Alias field. Then add a custom event called Alias. Add one Alias event to the Individual screen for each remaining alias.

5. Type the date and place of the event.
6. Indicate whether this information should be kept confidential.

### How to remove a custom event or attribute from an Individual or Marriage screen

If you no longer need a custom event field on an Individual or Marriage screen, you can remove it. The custom event will still be available for use on other Individual and Marriage screens.

#### Steps

1. Display the Individual or Marriage screen that you want to remove the event from.
2. Put the cursor in one of the fields for the event you want to remove.
3. Click **Options**.
4. Select **Remove Event/Attribute**.
5. The program asks if you are sure that you want to remove the event. Click **Yes**.

### How to add a custom event or attribute to the Individual Event List or Marriage Event List

You can add custom events and attributes to the Individual Event List and the Marriage Event List. If you want a custom event or attribute to appear on both lists, you will have to add it separately to both lists.

When you add a custom event or attribute to the list, you must define what information the event will contain and how that event will appear on reports and web pages.

#### Steps

1. From the **Edit** menu, select **Individual Event List** or **Marriage Event List**. Or if you are starting on the Individual or Marriage screen, follow these steps:
  - a. Click **Options**.
  - b. Select **New Event/Attribute**.
2. Click **New**.
3. Type a title for the custom event or attribute.
4. Type a short title. The program uses the short title when a report does not have enough room for the complete title.
5. Type an abbreviation. The program uses the abbreviation when a report does not have enough room for the short title or the complete title.
6. Indicate whether the event or attribute should have a Date field, Place field, Description field, and Confidential field.
7. On the Male tab, type the sentences that will be used for men and boys. On the Female tab, type the sentences that will be used for women and girls. On the Unknown tab, type the sentences that will be used when an individual's sex is listed as Unknown.

**Tip:** If you want the sentences to include information such as the date, place, or description, use the codes that appear near the bottom of the screen. For example, type %4 where you want the sentence to include the event date.
8. Click **OK**.

### How to edit a custom event or attribute on the Individual Event List or Marriage Event List

You can edit the information used to define a custom event or attribute.

The Individual and Marriage screens have different lists of custom events and attributes. If you want to edit the same custom event or attribute on both lists, you will have to edit it separately for each list.



### *Steps*

1. From the **Edit** menu, select **Individual Event List** or **Marriage Event List**. Or if you are starting on the Individual or Marriage screen, follow these steps:
  - a. Click **Options**.
  - b. Select **New Event/Attribute**.
2. Click the custom event or attribute that you want to edit.
3. Click **Edit**.
4. Change the information on the Define Custom Event screen.
5. Click **OK**.

### **How to delete a custom event or attribute from the Individual Event List or Marriage Event List**

If you do not use a custom event or attribute that you created, you can delete it. You cannot delete the events that come standard with the program.

The Individual and Marriage screens have different lists of custom events. If you want to remove the same custom event or attribute from both lists, you will have to remove it separately from each list.

**Tip:** If you have already added this event to individual and marriage records in the .paf file, do not delete the event or attribute until you remove it from each Individual and Marriage screen that uses it. If you do not remove the event, it will not print correctly on reports or be included correctly on web pages.

### *Steps*

1. From the **Edit** menu, select **Individual Event List** or **Marriage Event List**. Or if you are starting on the Individual or Marriage screen, follow these steps:
  - a. Click **Options**.
  - b. Select **New Event/Attribute**.
2. Click the event that you want to delete.
3. Click **Delete**.
4. When the program asks if you want to delete the event, click **Yes**.
5. To return to the previous screen, click **Close**.

---

# Citing sources

“Citing sources” means that you record where you found information about an individual. Examples of sources include birth certificates, censuses, church records, tombstones, family records and genealogies, inscribed objects, and so forth.

Sources provide you with the following benefits:

- They allow you to evaluate the reliability of your information. For example, an original record created near the time when an event occurred is probably more reliable than a biography written after the event. Knowing the source can help you identify information that you want to verify with other types of records.
- They provide a history of the sources you have examined. You can then focus research efforts on sources that have not yet been used.
- They help you evaluate conflicting information. When you find conflicting information, such as two different birth dates for the same individual, you can use your sources to determine which one is the most likely to contain the correct information.
- They acknowledge work done by others.

## How sources are stored

A source has three types of information:

**Source description.** This describes the source as a whole. After you type it once, you need only select it from a list to cite it in another place in the .paf file.

**Citation.** This contains the information needed to find a particular piece of information within the source. For example, it might contain a page number of a book, or a page and line number of a census. The citation is attached to a specific individual record or marriage record. Therefore, if you need to cite the same source description and citation on another record, you can select the source description from a list. You can copy one citation and paste it on another record.

**Repository.** This is the name, address, and telephone number of the place, such as a library or archive, where you found the source. If you record this information, you or other researchers can find the source again. After you type a repository once, you only need to select it from a list to use it for another source description.

## Guidelines for citing sources

Type in your sources as you work, or you may forget them.

Provide enough information so that you or another individual can easily find the source again. You will never regret adding too much information.

Cite the source you actually use. If you used an abstract or index, cite it and not the actual record. Abstracts and indexes may contain errors.

Identify all researchers' contributions, including your own. Use your name, not *I* or *me*, when referring to yourself.

## Linking sources to individual and marriage events

You can link your sources to the information that you found in them. For example, you can link an individual's birth certificate directly to the birth information. You can link the death certificate to the death information.

When you print reports, such as family group records, the birth information will have a footnote that lists the sources of the birth information. The death information will have a separate footnote.

### ***Linking sources to information on the Individual screen***

You can link sources to 7 types of information on the Individual screen:

- **Individual in general.** Click the Individual Sources button.
- **Birth date and place.** Double-click the S (source button) to the right of the Birthplace field.
- **Christening date and place.** Double-click the S to the right of the Christening Place field.
- **Death date and place.** Double-click the S to the right of the Death Place field.
- **Burial date and place.** Double-click the S to the right of the Burial Place field.
- **Latter-day Saint ordinances.** Double-click the S to the right of the Temple field for that ordinance.
- **Custom events.** Double-click the S to the right of the Place field. (To add a custom event to the screen, click the Options button, and select New Event/Attribute.)

### ***Linking sources to information on the Marriage screen***

You can link sources to 4 types of information on the Marriage screen:

- **Marriage date and place.** Double-click the S to the right of the Marriage Place field.
- **Latter-day Saint sealing.** Double-click the S to the right of the Temple field.
- **Family.** Click the Family Sources button.
- **Custom events.** Double-click the S to the right of the place field. (To add a custom event to the screen, click the Options button, and select New Event/Attribute.)

## **Using the sources in the .paf file**

You can use the sources in the .paf file in a variety of ways:

- You can print sources in books, family group records, individual summaries, and custom reports.
- You can print a list of the source descriptions in the .paf file.
- You can print a list of citations for each source description.
- You can include sources in web pages.
- You can create focus lists based on information in sources.
- You can export sources in GEDCOM files.

## **Typing source titles**

As you add source descriptions to the .paf file, the titles appear on the Source List. As this list grows, it can be difficult to find the source you want. Further, people with whom you share information may not understand your source information.

To help solve these challenges, you could use a standard for source titles.

### ***Published sources***

For published sources, such as books, magazine articles, newspapers, compact discs, and so forth, use the exact title.

### ***Unpublished sources***

Unpublished sources include birth certificates, parish registers, census records, journals, private collections of family records, and so forth.

These sources often have no official title, so you must type a descriptive title instead. You could adopt a standard and use it consistently. A standard can help keep similar types of records together on the Source List and make the list easier to scan.

**Tip:** You could group similar types of records into one source description. For example, if you have several birth certificates from North Dakota, you could have one source description that covers all of them. You can type the specific information about each specific certificate in the citation.

Three standards are suggested below. You may use one or a combination of all three.

- **Record Type.** Type the record type at the beginning of the title.

Census: 1881 England

Journal: Caruta, Giovanni Battista Ferdinando (1880-1884)

Birth certificates: North Dakota

Interview: Palson, Sven Oskar (1979)

Personal knowledge: Brandt, Karl Friedrich

Engraved silver spoon: Smith, Wilma Ann (1944)

Web site: The Cowley Space

Family records: Cieto, Paulo

- **Place.** You can group your sources by the places they cover. You may choose to use only the country or state, or you could use complete place-names. Whichever method you use, type them consistently.

England: 1881 Census

North Dakota: Birth certificates

Portugal, Murtosa, Aveiro: Journal of Cigana, Maria Luise (1880-1884)

Idaho, Lincoln, Shoshone: Engraved silver spoon of Smith, Wilma Ann (1944)

Isle of Man: The Cowley Space web site

Germany: Personal knowledge of Brandt, Karl Friedrich

Brazil: Family Records of Cieto, Paulo

- **Surname.** Sometimes you could begin a title with the name of an individual. Type names consistently. You will probably want to type the surname first. If you have several ancestors who had the same or similar names, you could add the individual's birth year.

Palson, Sven Oskar (1919): Interview (1979)

Martinez Guajardo, Jose Luis Alberto: Family records

Caruta, Giovanni Battista Ferdinando: Journal (1880-1884)

Brandt, Karl Friedrich: Personal knowledge

Smith, Wilma Ann (1944): Engraved silver spoon

Cowley, Charles Cesar: The Cowley Space web site

Cieto, Paulo: Family records

## Using style guides for sources

A style guide can help you follow the standards that the publishing industry uses for source citations. Style guides offer the following advantages:

- They can help you decide what information to record about each type of source.
- They contain examples.
- Standards help other people understand and use your source information.

Below are two examples of style guides in English:

Mills, Elizabeth Shown. *Evidence: Citation and Analysis for the Family Historian*. Baltimore: Genealogical Publishing Company, 1997. You can order this book through any bookstore.

Silicon Valley PAF Users Group. *Family History Documentation Guidelines*. [San Jose, Calif.]: Silicon Valley PAF Users Group, 2000. You can order this style guide by mail for \$10 (U.S.). Write to:

Silicon Valley PAF Users Group  
P.O. Box 23670  
San Jose, CA 95153-3670  
USA

## Adding sources to events on individual and marriage records and to families

Adding sources to a .paf file is a three-part process:

- Type the source description, which includes the title, author, publication information, and other information that describes the source as a whole. You need to type each source description once. You can use one source description as many times as needed.
- Link the source description to an event on the Individual screen, to an event on the Marriage screen, or to a family.
- Type the citation, which describes the exact place within the source where you found the information, such as a page or certificate number. Once you type a citation, you can copy it and paste it when you cite the same source for another individual, marriage, or family.

When you add and link sources, you can use one of two methods:

- Start from an Individual or Marriage screen. When you do this, you will have added the source, linked it to a record, and typed the citation.
- Use the Source List to add the source description. Later, you can link it to an event on the Individual screen, to an event on the Marriage screen, or to a family.

### How to add a new source to an individual record or marriage record

In one process, you can add a new source description and link it to an event on the Individual screen, to an event on the Marriage screen, or to a family.

**Tip:** If you do not want to link the new source to an event on the Individual screen, to an event on the Marriage screen, or to a family, use the Source List.

See “How to use the Source List to add a source description” (p. 67).

### Steps

1. Display the Individual or Marriage screen that you want to add a source to.
2. To link a source to an event on the Individual screen, double-click the **S** that is located next to the event. Or to link a source to the individual in general, click **Individual Sources**. Or to link a source to an event on the Marriage screen,

double-click the **S** that is located next to the event. Or to link a source to the family, on the Marriage screen, click **Family Sources**.

**Tip:** If an S or Family Sources button has an asterisk (\*), sources have already been added.

3. If the Sources screen appears, it means that sources have already been added. To add another source, click **New**, and then **New** again. If the Select Source screen appears, click **New**.
4. Type the information requested on each field of the Source screen. When you are finished, click **OK**.  
**Tip:** To add the name and address of the place where you found this source, click the Repository button. To add a multimedia file for the source, click the Image button.
5. With the new source description selected, click **Select**.
6. Type the citation.
7. When you are finished, click **OK**.

### How to link an existing source to an individual record or marriage record

If a source description is already in the .paf file, you simply need to select it from the list and type the citation.

#### Steps

1. Display the Individual or Marriage screen that you want to add a source to.
2. To link the source to an event on the Individual screen, double-click the **S** that is located next to the event. Or to link a source to the individual in general, click **Individual Sources**. Or to link the source to an event on the Marriage screen, double-click the **S** that is located next to the event. Or link the source to the family, on the Marriage screen, click **Family Sources**.  
**Tip:** If an S button has an asterisk (\*), sources have already been added to that information.
3. If the Sources screen appears, it means that sources have already been added. To add another source, click **New**, and then **New** again. If the Select Source screen appears, click **New**.
4. Click the source description you want to use, and click **Select**.
5. Type the citation.
6. When you are finished, click **OK**.

### Copying sources

You can copy sources.

- **Source description only.** If you need to add a new source description that is similar to a source description that is already in the .paf file, you can copy the existing source description and modify the copy as needed. The new source description will appear on the Source List and be available to use anywhere in this .paf file.
- **Source description and citation.** You may need to use the same source description and citation in many places in the .paf file. Personal Ancestral File lets you copy one citation (which consists of both the source description and the citation). You can then paste the sources into other events on the same or another individual record or marriage record.

## How to copy source descriptions

If you need to add a source description that is similar to one that you typed previously, you can copy the source description and modify the copy as needed.

**Tip:** You can also copy a source description from the Source List. From the Edit menu, select Source List. Start with step 4, below.

### Steps


1. Display the Individual or Marriage screen that you want to add a source to.
2. To link the source to an event on the Individual screen, double-click the **S** that is located next to the event. Or to link a source to the individual in general, click **Individual Sources**. Or to link the source to an event on the Marriage screen, double-click the **S** that is located next to the event. Or to link the source to the family, on the Marriage screen, click **Family Sources**.  
**Tip:** If an S button has an asterisk (\*), sources have already been added to that information.
3. If the Sources screen appears, it means that sources have already been added. To add another source, click **New**.
4. Click the source that you want to copy, and click **Copy**.
5. On the Edit Source screen, make any needed changes, and click **OK**.
6. With the new source selected, click **Select**.
7. Type the information requested for the citation.
8. When you are finished, click **OK**.


## How to copy a source description and citation

If you want to cite the same source description and citation in another place in the .paf file, you can use the Memorize Citation and Paste Citation features. (This will copy both the citation and the source description.)

You can paste the citation into the sources for other events, other individuals, and other marriages.

### Steps

1. Display the individual or marriage record that has the citation that you want to copy.
2. Double-click the appropriate source button.  
**Tip:** If an item already has sources, the source button displays an asterisk (\*).
3. If the source is displayed on the screen, go to step 4. If the source does not appear, click > until the source appears.
4. Click  .
5. To return to the previous screen, click **OK**.
6. To paste the source description and citation to a different event on the same individual record or marriage record, skip to step 7. To paste the source description and citation to a different individual record or marriage record, click **Save**. Then display the individual or marriage record where you want to copy the information.

7. Double-click the appropriate source button.
8. If the Select Source screen appears, click **Use Memorized Citation**. Or if the Sources screen appears, click .
9. Make any needed modifications.
10. Click **OK**.

## Editing sources

A source has three types of information; each type is edited differently.

**Source description.** The easiest way to edit a source description is to use the Source List. However, you can also begin from an Individual or Marriage screen that uses the source description.

**Citation.** To edit the citation, you must begin on the Individual or Marriage screen.

**Repository.** The easiest way to edit a repository is to use the Repository List. However, you can also begin from an individual or marriage record that uses a source that has the repository.

### How to edit or replace a source description

When you edit a source description, the changes appear everywhere you use it.

**Tip:** The fastest way to edit a source description is to use the Source List.

See “How to use the Source List to edit a source description” (p. 67).

See “How to change or remove the repository from a source” (p. 65).

### Steps

1. Display the Individual or Marriage screen that uses the source that you want to edit.
2. To edit a source description for an event on the Individual screen, double-click the **S** that is located next to the event. Or to edit a source description for the individual in general, click **Individual Sources**. Or to edit a source description for an event on the Marriage screen, double-click the **S** that is located next to the event. Or to edit a source description for the family, on the Marriage screen, click **Family Sources**.
3. If the event or family already has sources, the Sources screen appears, click > until the source you want to edit appears. To edit the source description, click **Edit**. Continue with step 4.  
Or to select a different source description, click **Replace**. Click the one that you want, and click **Select**. Skip the remaining steps.  
Or if the item does not have sources, the Select Source screen appears. Click the source you want to edit. Click **Edit**.
4. Make any needed changes to the source description, and click **OK**.  
**Tip:** To record the name and address of the place where you found this source, click the Repository button. To add a multimedia file for the source, click the Image button.
5. Make any needed changes to the citation, and click **OK**.



### How to edit the citation

When you edit the citation, the change appears only for this instance where you used the source.

**Tip:** You cannot edit the citation from the Source List.

#### Steps

1. Display the Individual or Marriage screen that uses the source that you want to edit.
2. To edit the citation for an event on the Individual screen, double-click the **S** that is located next to the event. Or to link a citation for the individual in general, click **Individual Sources**. Or to edit the citation for an event on the Marriage screen, double-click the **S** that is located next to the event. Or to edit the citation for the family, click **Family Sources** on the Marriage screen.
3. If the source is displayed on the screen, go to step 4. If the source does not appear, click > until it does.
4. Make any needed changes to the citation (located at the bottom of the screen), and click **OK**.

### How to change or remove the repository from a source

When you change or remove a source's repository, the change appears everywhere you used that source.

**Tip:** You can also change a source's repository from the Source List.

See "How to use the Source List to edit a source description" (p. 67).

#### Steps

1. From the Source screen, click **Repository**.
2. To select a different repository, click the name, and click **Select**. Or to remove the repository, click <<**no repository**>>.
3. Click **Select**.

### Removing sources from individuals, marriages, and families

Sometimes you may find that you need to remove (unlink) the source description and citation from an event on the Individual screen, an event on the Marriage screen, or a family. For example, you may find that you have used the wrong source.

#### How to remove a source from a record

You can remove (unlink) the source description and citation from an event on the Individual screen, an event on the Marriage screen, or a family. Do this when you want to use the source description for other records in the .paf file.

The source description and repository will not be deleted from the .paf file. They will be unlinked only from the record. The citation, however, will be deleted from the .paf file.

#### Steps

1. Display the Individual or Marriage screen that uses the source that you want to remove.
2. To remove the source description and citation from an event on the Individual screen, double-click the **S** that is located next to the event. Or to remove the

source description and citation from an event on the Marriage screen, double-click the **S** that is located next to the event. Or to remove the source description and citation from the family, on the Marriage screen, click **Family Sources**.

3. Click **>** until the source you want to remove appears.
4. Click **Delete**.
5. When the computer asks if you are sure that you want to remove the citation, click **Yes**.
6. To return to the Individual or Marriage screen, click **Close**.

## Deleting sources from the .paf file

Delete the source from the .paf file only when you no longer need that source for any record in the .paf file. You can begin from either an individual or marriage record that uses the source, or you can use the Source List.

### How to delete a source from the .paf file

When you delete a source description from the .paf file, it will be deleted from all individual records, marriage records, and families where it is used. All of the citations associated with it will also be deleted.

**Tip:** The fastest way to delete a source is to use the Source List.

See “How to use the Source List to delete a source description” (p. 67).

### Steps

1. Display the Individual or Marriage screen that uses the source you want to delete.
2. To delete the source description and citation from an event on the Individual screen, double-click the **S** that is located next to the event. Or to delete the source description and citation from an event on the Marriage screen, double-click the **S** that is located next to the event. Or to delete the source description and citation from the family, click **Family Sources** on the Marriage screen.
3. If the item already has sources, the Sources screen appears. To display the Source List, click **New**. Or if the item does not have sources, the Source List appears. Go to step 4.
4. From the Source List, click the source you want to delete.
5. Click the source that you want to delete, and click **Delete**.
6. When the computer asks if you are sure that you want to delete the source, click **Yes**.
7. To return to the Individual or Marriage screen, click **Close**.

## Using the Source List

The Source List shows the source descriptions in the .paf file and allows you to add, copy, edit, or delete them.

You can access this list in three main ways:

- From the Edit menu, select Source List.
- From an Individual or Marriage screen, click the appropriate source button. If the record already has sources, a screen showing these sources appears. To view the Source List, click the New button.
- When you print the list of citations referencing a source.

### How to use the Source List to add a source description

If you want to add a source to the .paf file but not link it to an event on the Individual screen, an event on the Marriage screen, or a family, you can use the Source List to add it.

#### Steps

1. From the **Edit** menu, select **Source List**.
2. Click **New**.
3. Type the information requested on each field of the Source screen.  
**Tip:** To record the name and address of the place where you found this source, click the **Repository** button. To add a multimedia file for the source, click the **Image** button.
4. When you are finished, click **OK**.

### How to use the Source List to edit a source description

You can use the Source List to edit a source description. The changes that you make will appear everywhere that you use this source description.

#### Steps

1. From the **Edit** menu, select **Source List**.
2. Click the source you want to edit.
3. Click **Edit**.
4. Type the changes needed.  
**Tip:** To record the name and address of the place where you found this source, click the **Repository** button. To add a multimedia file for the source, click the **Image** button.
5. When you are finished, click **OK**.

### How to use the Source List to delete a source description

You can use the Source List to delete a source description from the .paf file. All of the citations associated with that source will also be deleted.

#### Steps

1. From the **Edit** menu, select **Source List**.
2. Click the source you want to delete.
3. Click **Delete**.
4. When the computer asks if you are sure that you want to delete the source, click **Yes**.

## Using multimedia in sources

You can add pictures to source descriptions and citations, such as a scanned image of a birth certificate.

**Tip:** If you attach a picture to a source, you cannot print the picture, view it in a scrapbook, or include it in a slideshow. To do these tasks, add the picture to the individual.

### How to add multimedia to a source description

You can add one image to each source description in the .paf file. That image appears each time you use that source description.

**Tip:** You can also add multimedia to a source description from the Source List.

See “How to use the Source List to edit a source description” (p. 67).

#### Steps

1. Display the Individual or Marriage screen that has the source description that you need.
2. To link a multimedia file to a source description that is linked to an event on the Individual screen, double-click the **S** that is located next to the event. Or to link a multimedia file to a source description that is linked to an event on the Marriage screen, double-click the **S** that is located next to the event. Or to link a multimedia file to a source description that is linked to the family, on the Marriage screen, click **Family Sources**.
3. If the correct source description appears on the screen, go to step 4. If not, click > until it does.
4. Click **Edit**.
5. Click **Image**.
6. Click **Attach**.
7. Select the item type and file.
8. If you want to type information about the image, type a caption and description.
9. When you are finished, click **OK**.
10. To return to the Source screen, click **Close**.

**Tip:** When you add a multimedia file to a source, the Image button displays an asterisk (\*).

### How to add multimedia to a source citation

You can add one image to each citation in the .paf file. The image appears only with that single citation. For example, if you have several images from the same source, such as several pages from one book, you can attach each separate image to the citation.

#### Steps

1. Display the Individual or Marriage screen that has the citation you need.
2. To add multimedia to citations that are linked to an event on the Individual screen, double-click the **S** that is located next to the event. Or to add multimedia to citations that are linked to an event on the Marriage screen, double-click the **S** that is located next to the event. Or to add multimedia to citations that are linked to the family, on the Marriage screen, click **Family Sources**.
3. If the correct citation appears on the screen, go to step 4. If not, click > until it does.
4. Click **Image**.
5. Click **Attach**.
6. Select the item type and file.

7. If desired, type a caption and description.
8. When you are finished, click **OK**.
9. To return to the Source screen, click **Close**.

**Tip:** When you add a multimedia file to a citation, the Image button displays an asterisk (\*).

### **How to change the multimedia file that is linked to a source description**

When you change the multimedia that is linked to a source description, the new multimedia appears each time you use that source description.

**Tip:** You can also edit the multimedia of a source description from the Source List.

See “How to use the Source List to edit a source description” (p. 67).

#### **Steps**

1. Display the Individual or Marriage screen that has the source description that you need.
2. If the multimedia file is linked to an event on the Individual screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to an event on the Marriage screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to the family, on the Marriage screen, click **Family Sources**.
3. If the correct source description appears on the screen, go to step 4. If not, click > until it does.
4. Click **Edit**.
5. Click **\*Image**.  
**Tip:** If the Image button does not have an asterisk (\*), the source description does not have an image.
6. Click **Edit**.
7. If needed, select a different item type and file.
8. If desired, type a new caption and description.
9. When you are finished, click **OK**.
10. To return to the Source screen, click **Close**.

### **How to change the multimedia file that is linked to a source citation**

When you change the multimedia that is linked to a citation, it appears only with that single citation.

#### **Steps**

1. Display the Individual or Marriage screen that uses the source whose multimedia you want to edit.
2. If the multimedia file is linked to a citation for an event on the Individual screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to an event on the Marriage screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to a citation for the family, on the Marriage screen, click **Family Sources**.
3. If the correct citation appears on the screen, go to step 4. If not, click > until it does.

4. Click **\*Image**.  
**Tip:** If the Image button does not have an asterisk (\*), the citation does not have an image.
5. Click **Attach**.
6. Select the item type.
7. Select the file.
8. If desired, type a new caption and description.
9. When you are finished, click **OK**.
10. To return to the Sources screen, click **Close**.

### How to remove multimedia from a source description

You can remove the multimedia file that is attached to a source description.

When you remove multimedia from a source description, you simply remove the link to the multimedia file. You do not delete the file from your hard disk.

**Tip:** You can also remove multimedia from a source description from the Source List. See “How to use the Source List to edit a source description” (p. 67).

#### Steps

1. Display the Individual or Marriage screen that has the source description that you need.
2. If the multimedia file is linked to a source description for an event on the Individual screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to a source description for an event on the Marriage screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to a source description for the family, on the Marriage screen, click **Family Sources**.
3. If the correct source description appears on the screen, go to step 4. If not, click > until it does.
4. Click **Edit**.
5. Click **\*Image**.  
**Tip:** If the Image button does not have an asterisk (\*), the source description does not have an image.
6. Click **Remove**.
7. To return to the Edit Source screen, click **Close**.

### How to remove multimedia from a source citation

After you have linked multimedia to citation, you can remove it.

When you remove multimedia from citation, you simply remove the link to the multimedia file. You do not delete the file from your hard disk.

#### Steps

1. Display the Individual or Marriage screen that uses the citation whose multimedia you want to remove.
2. If the multimedia file is linked to a citation for an event on the Individual screen, double-click the **S** that is located next to the event. Or if the multimedia file is

linked to a citation for an event on the Marriage screen, double-click the **S** that is located next to the event. Or if the multimedia file is linked to a citation for a family, on the Marriage screen, click **Family Sources**.

3. If the correct citation appear on the screen, go to step 4. If not, click > until it does.
4. Click **\*Image**.  
**Tip:** If the Image button does not have an asterisk (\*), the citation does not have an image.
5. Click **Remove**.
6. To return to the Source screen, click **Close**.

## Examples of sources

Sometimes the best way to understand how to cite sources is to see a few examples.

The following list contains formats in which many genealogical sources are stored. If you do not see the exact record that you need, choose an example that is stored in a similar format. For example, if you have a copy of a will, you might use the “Birth certificates and similar records” example. If the will is on microfilm, you might use the “Microfilmed records (such as censuses, parish registers, and so forth)” example.

**Important:** Record enough information that you or another person could find the source again and evaluate the accuracy of the information.

The examples suggest what information you should record and in which field to put it.

### Birth certificates and similar records

The following information lists key fields that you might want to fill out for a birth or other type of certificate.

**Important:** If you used a transcription, index, or abstract, cite that rather than the individual certificate.

#### *Source description*

- **Source title.** Type a descriptive title.  
See “Typing source titles” (p. 59).
- **Author.** Type the institution that created the source.
- **Repository.** Type the name, address, and telephone number of the agency from which anyone could order a copy of the certificate. If you type the name and address of a private individual, please obtain the individual’s permission first.

#### *Citation*

- **Film/Volume/Page Number.** Type the certificate number, file number, or other identifying information.
- **Date record was made.** Type the date on which the certificate was issued. This may or may not be the birth date.

### Published books

The following information lists key fields that you might want to fill out for a published, single-volume book.

#### *Source description*

- **Source title.** Type the title as it appears on the title page.

- **Author.** Type the author's name. The author may be one or more individuals or an institution.
- **Publication information.** Type the place where the book was published, the publisher, and the copyright date. You can typically find this information on the book's title page and copyright page. Include edition numbers and reprint dates, if needed.
- **Source call number.** If you used the book in a library or archive, type the book's call number.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the book. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type the page number where you found the information.

### **Multivolume books**

The following information lists key fields that you might want to fill out for a multivolume book.

### *Source description*

- **Source title.** If the series as a whole has a title, type that title. You can type the title of a specific volume in the citation.
- **Author.** Type the author's name. The author may be one or more individuals or an institution. If each volume in the series has a different author, type the name of the editor or compiler of the series. You can type the information about the specific volume in the citation.
- **Publication information.** Type the place where the books were published, the publisher, and the copyright date. You can typically find this information on the book's title page and copyright page. Include edition numbers and reprint dates, if needed.
- **Source call number.** If you used the book in a library or archive, type the call number.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the books. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type the volume number and page number where you found the information.

### **Privately published books**

The following information lists key fields that you might want to fill out for a privately published book.

### *Source description*

- **Source title.** Type the title as it appears on the title page or cover.



- **Author.** Type the author's name. The author may be one or more individuals or an institution.
- **Publication information.** Type as much information as you can find. You could include the words "privately published" to clarify the information. Sometimes you can find publication information in the catalog of the library or archive where you found the book.
- **Source call number.** If you used the book in a library or archive, type the book's call number.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the book. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type the page number or any other information needed to find the information in the book.

### **Interviews and oral histories**

The following information lists key fields that you might want to fill out for an interview or oral history.

**Important:** If you used a transcription, index, or abstract, cite that rather than the actual interview or oral history.

### *Source description*

- **Source title.** Type a descriptive title.  
See "Typing source titles" (p. 59).
- **Author.** For interviews, type the name of the individual who conducted the interview. For an oral history, type the name of the individual who recited the history.
- **Publication information.** Type the format on which the information is stored, such as an audio tape or video tape.
- **Repository.** Type the name, address, and telephone number of the place in which anyone could find the interview. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type any information that could help someone find the information within the interview.
- **Date record was made.** If known, type the date on which the interview took place.

### **Personal journals and diaries**

The following information lists key fields that you might want to fill out for a journal or diary.

**Important:** If you used a transcription, cite that rather than the actual journal.

### *Source description*

- **Source title.** If the journal or diary has a title, type it. If it does not, type a descriptive title. You could include the dates that the journal covers.  
See “Typing source titles” (p. 59).
- **Author.** Type the name of the individual who wrote the journal. If you used a transcription, include the transcriber's name as well.
- **Source call number.** If the journal is in a library or archive, include its call number.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the journal or diary. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** If the journal has page numbers, type the numbers of the pages that you used.
- **Date record was made.** Type the date when the journal entry was written.

### **Magazine and newspaper articles**

The following information lists key fields that you might want to fill out for an article in a newspaper or magazine.

**Tip:** If you have many obituaries from the same newspaper, you could create a generic source description for them. In the source description, include the name of the newspaper and its publisher. In the citation, type the date on which the article appeared, the section and page numbers, and so forth.

### *Source description*

- **Source title.** Type the title of the article.
- **Author.** Type the author's name.
- **Publication information.** Type the name of the periodical, volume numbers, issue numbers, issue dates, and range of pages that the article covers.
- **Source call number.** If you used the magazine or newspaper in a library or archive, type the call number.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the magazine or newspaper. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type the section and page numbers that the article covers.

### **Microfilmed records (such as censuses, parish registers, and so forth)**

The following information lists key fields that you might want to fill out for a microfilmed record.

### *Source description*

- **Source title.** If a record has an actual title, type it. If it does not, type a descriptive title.

See “Typing source titles” (p. 59).

- **Author.** Type the name of the individual or institution that created the original source. (This may not be the name of the organization that microfilmed the record.)
- **Publication information.** If the microfilm contains published information, type the place of publication, the publisher's name, the copyright date, the name of the organization that microfilmed the record, and the date when the microfilm was made. If the microfilm contains unpublished information, type as much information as you can find. Include the name of the organization that microfilmed the record and the date when the microfilm was made. Sometimes you can find publication information in the catalog of the library or archive where you found the microfilm.
- **Call number.** If the microfilm is a part of a set, type the range of microfilm call numbers. If it is not, type the number.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the microfilm. If you type the name and address of a private individual, please obtain the individual's permission first. If you used the microfilm at a Family History Center, you may want use the Family History Library as the repository:

Family History Library  
35 N. West Temple Street  
Salt Lake City, UT 84150-3400  
USA  
801-240-3702

### *Citation*

- **Film/Volume/Page Number.** Type all of the information needed to find the specific microfilm and the specific frame within the microfilm. You may find frame numbers, page numbers, certificate numbers, and so forth. For a microfilm series, also include the call number of the particular microfilm.
- **Date record was made.** If you know the day when the record on the microfilm was created, type it here. For example, if you are using a parish register on microfilm, type the date on which the information was written in the register, not the date when the register was microfilmed.
- **Comments.** You could include a description of the microfilm's quality. You could include specific instructions for using the microfilm or for finding the entry that you used.

### **Compact discs**

The following information lists key fields that you might want to fill out for a computerized record.

### *Source description*

- **Source title.** Type the title of the compact disk or collection of records.

See “Typing source titles” (p. 59).

- **Author.** Type the name of the individual or institution that created the computer record.
- **Publication information.** Type any publication information that you can find, including version numbers and publication dates.
- **Call number.** If you used a compact disc at an archive or library, type its call number. If the disc is part of a set, type the range of numbers.
- **Repository.** Type the name, address, and telephone number of a place in which anyone could find the compact disc. You could use a company where a compact disc may be purchased or an Internet address. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type all of the information needed to find the specific record on computer, such as a record identification number, Ancestral File number, compact disc number, and so forth.
- **Date record was made.** If you know the date when the original information was created, type it here. (This is not the date when the compact disc was made.)

### **Personal knowledge**

The following information lists key fields that you might want to fill out for personal knowledge.

### *Source description*

- **Source title.** Type a descriptive title. Include the name of the individual who knows or knew the information.
- See "Typing source titles" (p. 59).
- **Repository.** Type the name, address, and telephone number of the individual who knows the information. If this individual is not you, please obtain the individual's permission first.
- **Comments.** You could add information that would help another individual evaluate the reliability of the information.

### **Correspondence (such as letters or e-mail)**

The following information lists key fields that you might want to fill out for correspondence.

### *Source description*

- **Source title.** Type a descriptive title.  
See "Typing source titles" (p. 59).
- **Author.** Type the name of the individual who wrote the correspondence.
- **Publication information.** Type all of the information you have about the correspondence, including how it was received (personal letter, e-mail, and so forth), who wrote it, who received it, and the date it was written or received.
- **Repository.** Type the name, address, and telephone number of the individual who has the information. If this individual is not you, please obtain the individual's permission first.

### *Citation*

- **Date record was made.** Type the date on which the correspondence was written.
- **Actual text.** You may find it helpful to type the text of the letter or copy the text from the e-mail.

### **Objects with an inscription**

The following information lists key fields that you might want to fill out for an object with an inscription.

#### *Source description*

- **Source title.** Type a descriptive title.  
See “Typing source titles” (p. 59).
- **Publication information.** Type all of the information you have about the object, such as the company that created it, approximately when it was created, and so forth. You may find this information engraved on the object.
- **Repository.** Type the name, address, and telephone number of the individual who has the object. If this individual is not you, please obtain the individual's permission first.

### **Internet sources**

The following information lists key fields that you might want to fill out for an Internet source.

#### *Source description*

- **Source title.** You can type the name of the actual web site or a descriptive title.  
See “Typing source titles” (p. 59).
- **Author.** If you know it, type the individual or institution who created the web site. Include an e-mail address as well.
- **Publication information.** Type all of the information that you know about the information on the web site, such as the web site's copyright date and the date that you downloaded the information.
- **Call number.** Type the URL (Internet address). Be aware that Internet addresses change frequently.
- **Repository.** Type the name, mailing address, and telephone number of the individual or institution that owns the site, if possible.

### *Citation*

- **Film/Volume/Page Number.** Type all of the information needed to find the specific record on the web site.

### **Family records and genealogies**

The following information lists key fields that you might want to fill out for family records and genealogies.

#### *Source description*

- **Source title.** Type a descriptive title.

See “Typing source titles” (p. 59).

- **Author.** If known, type the name of the individual who compiled the records.
- **Publication information.** Type the format on which the information is stored.
- **Repository.** Type the name, address, and telephone number of the place in which anyone could find the interview. If you type the name and address of a private individual, please obtain the individual's permission first.

### *Citation*

- **Film/Volume/Page Number.** Type any information that could help someone find the information within the collection.
- **Date record was made.** If known, type the date on which the family records were made.

---

# Keeping track of repositories

When you add a source, you may also want to add information about the library, archive, cemetery, or other place where you found the source. This place is called a *repository*.

Each repository should have one record in a .paf file. Therefore, you need to type the information about a repository once, and then you can link it to as many sources as needed.

You can add the repository's name, address, and telephone number.

If you want to record more information, such as directions to a monument or cemetery, a web site, or an e-mail address, you can type this information in one of two places:

- You can type it in the Address field.
- You can type it in the Comments field of the source itself.
- For Internet sources, you could use the name of the individual or organization who owns the web site. Since Internet addresses can change frequently, record the telephone number and street or mailing address where you can contact the site's owner.

## Using names and addresses of private individuals

You may use sources, such as letters, books, or objects, that belong to an individual that you know.

Please obtain permission before you use his or her name, address, and mailing information as a repository.

Repository information is included when you share source information in GEDCOM files and printouts. Some people may not want you to share their information with people they may not know.

## How to add, edit, or remove a repository

Type a repository's name and address one time, and then you can then link it to one or more sources.

### *Steps*

1. If you are on the Family View screen, the Pedigree View screen, or the Individual View screen, you can add the repository directly to the Repository List. From the **Edit** menu, select **Repository List**. If you are on the Sources screen, click **Repository**.
2. To add a new repository, click **Add**. Or to edit a repository, click **Edit**.
3. Type the information requested in each field.
4. Click **OK**.
5. If the Select Repository screen appears, click the repository that you want to use, and click **Select**. To remove (unlink) a repository from the source description, click <<**No Repository**>>.

## How to delete a repository from the .paf file

If you no longer need a repository, you can delete it from the .paf file completely.

### *Steps*

1. If you are on the Family View screen or Pedigree View screen, you can delete the repository directly from the Repository List. From the **Edit** menu, select **Repository List**. Or you can delete a repository while you add or edit a source. From the Sources screen, click **Repository**.
2. Click the repository you want to delete.
3. Click **Delete**.
4. When the computer asks if you are sure that you want to delete the repository, click **Yes**.



---

# Using notes

You can have notes for each individual record and marriage record in the .paf file. You can use notes to keep track of many types of information, such as the following:

- Interesting or special circumstances of an individual's birth, death, or marriage
- Stories
- Journal entries
- Your research notes and "to do" lists

**Tip:** In Windows 95 and 98, you can have up to 59,000 characters in each set of notes. In Windows NT and 2000, you can have an unlimited number of characters in the notes.

You can use the notes in the .paf file in a variety of ways:

- You can print notes in books, family group records, individual summaries, and custom reports.
- If you use tagged notes, you can print them on ancestry charts and descendency charts. See "Using tags" (p. 82).
- You can print a list of individuals who have notes.
- You can include notes in web pages.
- You can create focus lists based on notes and the tags used in them.
- You can export notes in GEDCOM files.

## Guidelines for notes

If possible, type the information on the Individual screen and Marriage screen. Add custom events if the screens do not contain the fields that you need. For example:

- If an individual had several names, type them on the Individual screen in the Also Known As, Married Name, and Nickname fields. If you need more name fields, add them as custom events.
- Use custom events, not notes, to record information such as emigration, naturalization, military service, occupations, and physical attributes. Also use them for Latter-day Saint baby blessings, priesthood ordinations, and so forth.
- Use the Sources feature for sources. Do not record source information in your notes.
- Decide which notes you want to share with others and which notes you want to keep private. Private notes must begin on a separate line and must begin with a tilde (~). For example, to add a private note in the middle of an individual's notes, follow these steps:
  - Press the Enter key to begin the note on a new line.
  - Type ~.
  - Type the note.
  - Press the Enter key to end the note.

- Make sure the notes you want to share will be understandable to another researcher. For example, when you refer to yourself, you could use your name rather than the word *I*.
- Be consistent. For example, decide the following issues:
  - Will you spell out place-names or use standard abbreviations? (If you plan to share your information with others, you could spell out place-names.)
  - Will you type dates using the United States format (for example, Sep 10, 1867) or the international format (for example, 10 Sep 1867)?
  - Will you use tags? Which tags will you use?

## Using tags

Tagged notes are categorized notes. The tag is one word that is typed at the beginning of the note in all uppercase letters, followed by a colon:

BIRTH:

If you want to use tag with more than one word, type a hyphen or underscore instead of a space between the words. For example:

MILITARY-SERVICE:

TO-DO:

**Note:** An underscore does not separate words in a tag.

You could use tags to categorize the following types of information:

- **Narrative information.** If you have a lot of narrative information, such as stories or descriptions, use tags to categorize them. For example, you could type the tag BIRTH: at the beginning of a story about an individual's birth.
- **Research notes.** You can track various aspects of your research in notes. For example, you can create a "to do" list. Type the tag TO-DO before every task that you want to do. You can then create a custom report that you can use during your next research session.

Tags are useful in the following situations:

- If you have many notes, you can use the Notes Selector screen to view all of your notes at once or view only notes that begin with a certain tag.
- You can create focus lists based on tags.
- When you print ancestry or descendancy wall charts, you can select one or two tags and print the notes that begin with those tags.

## Converting notes to custom events

In the DOS versions of Personal Ancestral File, you could not add custom events to the Individual screen and Marriage screen. You had to type military service, occupation, immigration, Latter-day Saint baby blessings, and other such information in the notes.

In Personal Ancestral File 5.0, you should put this information on the Individual screen and Marriage screen as custom events. If you have upgraded from a previous version, you could move event information from notes to custom events.

Custom events have the following advantages:

- You can include the custom events on ancestry wall charts and descendancy wall charts. You cannot print notes on these reports.
- You can include the custom events on web pages, family group records, books, individual summaries, and custom reports. Though you can also print notes on these reports, custom events take less space than notes.

- You can create focus lists based on specific custom events. For example, if you have a custom event for immigration information, you could create a focus list of everyone who immigrated during a particular year on a particular ship. It is very difficult to create this type of focus list if the information is in the notes.
- Custom events do not take as much space in the .paf file or in GEDCOM files.
- You can include sources for custom events.

### Converting sources that are stored in notes

If you have source information in your notes, you will have to use cut and paste to move the information to sources.

**Tip:** If you have a .paf file from Personal Ancestral File 2.31 or earlier and if you followed the source guidelines from the Silicon Valley PAF Users Group (SVPAFUG) or from the Personal Ancestral File 2.31 manual, you could convert the .paf file into Personal Ancestral File 3.0 or 4.0 before you convert it for version 5.0. Versions 3.0 and 4.0 try to convert the notes to sources during the conversion process. Since Personal Ancestral File 5.0 does not convert .paf files from Personal Ancestral File 2.31, it cannot convert sources that are stored in notes.

### Advantages

Converting notes to sources requires a lot of work, but you will have the following advantages when you finish:

- **Reuse.** When you add a source, you type most of the information once. You can then use that source as many times as needed without retyping the information. When you add the source to notes, you must retype the information each time you use that source.
- **Printing.** When you print reports, you have several advantages:
  - You can choose to print only sources, only notes, both, or neither.
  - On family group records and individual summaries, sources are listed as footnotes. They are grouped according to the information found in them. For example, the birth information will have a footnote that lists only the sources that contained birth information.
  - You can print a list of sources and a list of citations referencing a source.
- **Exporting.** When you create GEDCOM files, you have the following advantages:
  - You can choose to include only sources, only notes, both, or neither.
  - Your sources will probably be more standardized and more easily understood by those who receive your information.
- **Web pages.** When you create web pages, you can choose to print only sources, only general notes, both, or neither.
- **Focus lists.** You can create more precise focus lists that contain individuals or marriages that have the same source.

### How to input notes that were stored in separate files

Before Personal Ancestral File 3.0, you could store notes in separate files and use your DOS-based word processor or text editor to manage them. When you accessed the notes, Personal Ancestral File would start your word processor rather than use its own notes feature. It simply maintained a link between the individual and the notes file that you were using.

This functionality allowed you to bypass the limitations on the amount of notes that you could add. It also allowed you to use your word processor's full functionality.

You cannot do this in Personal Ancestral File 3.0 and higher. However, you can use one of these methods to move your notes into the .paf file:

### ***If you have Personal Ancestral File 2.31***

If you have Personal Ancestral File 2.31, follow these steps:

- In Personal Ancestral File 3.0, make sure the configuration option is set to use separate files for notes.
- Create a GEDCOM file that contains all of your records. The separate notes will be included in the GEDCOM file.
- Open Personal Ancestral File 5.0, and import the GEDCOM file that you created in step 2.

### ***If you have Personal Ancestral File 3.0***

- If you have Personal Ancestral File 3.0, follow these steps:
- Convert your 2.31 .paf file for use in 3.0. The separate notes files will be included in the new 3.0 .paf file.
- Use Personal Ancestral File 5.0 to convert the 3.0 .paf file to 5.0.


### ***If you do not have Personal Ancestral File 2.31 or 3.0***

If you do not have either Personal Ancestral File 2.31 or 3.0, open your notes files in a Windows-based word processor. You can then use the Windows Cut and Paste features to move them into Personal Ancestral File.

## **How to add or edit notes**

Each individual record and marriage record in your file may have its own notes. You can add notes on the Individual screen, Marriage screen, Pedigree View screen, and Family View screen.

### ***Steps***

1. On the Individual or Marriage screen, click . Or on the Family View screen, Pedigree View screen, or the Individual View screen:
  - a. Select the individual or marriage on the screen.
  - b. From the **Edit** menu, select **Notes**.  
**Tip:** If the individual already has notes, a small triangle appears in the upper-right corner of the name box.
2. If the Notes Selector screen appears, click the tag you want to use. If the Notes Selector screen does not appear, go to step 3.
3. Type your notes:
  - Type notes in much the same way as you would use a word processor. The program automatically wraps your text, so you do not need to press **Enter** unless you are ending a paragraph.
  - Unless you are using tagged notes, it is better to press **Enter** only once between each paragraph. Indented paragraphs and no blank lines look best in Ahnentafel books and modified register books.

- If you want to print the note on reports, type an exclamation point as the first character of the paragraph.
  - To keep a note confidential, make sure the note begins on a new line and has a blank line before it. Then type ~ as its first character.
4. To save your notes, click **Save**.


### How to use ditto to copy notes

If you want to copy all or most of the notes, use the Ditto options.

You can use these options to copy all of the notes from the following records:

- The individual's father.
- The individual's mother.
- The individual's next oldest sibling.
- The primary person (the individual in the primary position).
- The last record in which you added or edited notes.

#### Steps

1. On the Individual screen or Marriage screen, click . Or on the Family View screen, Pedigree View screen, or the Individual View screen:
  - a. Select the individual or marriage on the screen.
  - b. From the **Edit** menu, select **Notes**.
 

**Tip:** If the individual already has notes, a small triangle appears in the upper-right corner of the name box.
2. From the **Edit** menu, select the ditto option that you want.
3. If needed, modify the notes.
4. Click **Save**.

### How to find and replace text in notes

You can find and replace text in individual notes and marriage notes. This find and replace routine has some limitations:


- It searches the notes for one individual or marriage at a time. It does not search all of the notes in the .paf file at once.

**Tip:** To search all of the notes in a .paf file at once, use the Global Search and Replace feature.

See “How to make global changes” (p. 162).

- It begins the search at the cursor, searches to the end of the text that is on the screen, and stops. If you want to search from the beginning of the individual or marriage notes, put the cursor at the beginning of the notes.
- If you used the Notes Selector and displayed notes that begin with a specific tag, the search works on the notes that are displayed on the screen.

### Steps


1. On the Individual screen or Marriage screen, click . Or on the Family View screen, Pedigree View screen, or the Individual View screen:
  - a. Select the individual or marriage on the screen.
  - b. From the **Edit** menu, select **Notes**.  
**Tip:** If the individual already has notes, a small triangle appears in the upper-right corner of the name box.
2. If the Notes Selector appears, click the tag that you want to use, and click **Open**.
3. Put your cursor where you want to begin the search.
4. From the **Edit** menu, select **Find**.
5. To search and replace text, click the **Replace** tab.
6. In the Find What field, type the text that you want to find. To search and replace text, in the Replace With field, type the text that will replace the text in the Find What field.
7. If you want the search to be case sensitive, mark **Match Case**.  
**Tip:** Case sensitive means that the search will consider uppercase and lowercase letters. If, for example, the search is case sensitive and you look for Mexico, the search will not find mexico.
8. If you want the search to find only the words you type as whole words, mark **Find Whole Words Only**.
9. Click **Find Next**.

### How to delete notes

You can delete:

- Some of an individual's notes.
- Notes that contain only a particular tag.  
**Tip:** To delete only notes that have a particular tag, you must use the Notes Selector screen. If it does not appear when you display the Notes screen, you must exit the Notes screen. Then go to the General tab of the Preferences screen, and turn it on. See "How to turn the Notes Selector on or off" (p. 87).
- All of an individual's notes.

### Steps

1. On the Individual screen or Marriage screen, click . Or on the Family View screen, Pedigree View screen, or the Individual View screen:
  - a. Select the individual or marriage on the screen.
  - b. From the **Edit** menu, select **Notes**.  
**Tip:** If the individual already has notes, a small triangle appears in the upper-right corner of the name box.

2. If the Notes Selector screen appears, click the tag that contains the notes you want to delete. Click **Open**.
3. To delete some of the notes, use the mouse to highlight the part of the notes that you want to delete. Press the **Delete** key. To delete all of the notes that are shown on the screen, click the **Delete** button.
4. If the program asks you to confirm the action, click **Yes**.

## Using the Notes Selector screen

If you use tagged notes, you could use the Notes Selector screen. It lets you do the following:

- You can choose whether you want to work with all of your notes at once or work with notes that have a particular tag.
- You can create focus lists that are based on tags and the information found within a tagged note.
- You can print notes that begin with a specific tag on ancestry wall charts and descendency wall charts.
- In Preferences you can specify when the Notes Selector screen appears. It can appear in one or both of these instances:
  - When you access notes from an individual record.
  - When you access notes from the Family View screen or the Pedigree View screen.

You cannot use the Notes Selector screen with the notes of a marriage record.

### How to turn the Notes Selector screen on or off

In Preferences you can turn the Notes Selector screen on or off.


#### *Steps*

1. From the **Tools** menu, select **Preferences**.
2. Select the **General** tab.
3. To display the Notes Selector screen when you access notes from an individual record, click **From edit individual**.
4. To display the Notes Selector screen when you access notes from the Family View screen or Pedigree View screen, click **While browsing**.
5. Click **OK**.

### How to use the Notes Selector to display notes

You can use the Notes Selector screen to see only notes that begin with a certain tag. This is helpful if you have many notes but only want to work with some of them.

### Steps

1. On the Individual screen or Marriage screen, click . Or on the Family View screen, Pedigree View screen, or the Individual View screen:
  - a. Select the individual or marriage on the screen.
  - b. From the **Edit** menu, select **Notes**.  
**Tip:** If the individual already has notes, a small triangle appears in the upper-right corner of the name box.
2. From the Notes Selector screen click the tag you want to view.  
**Tip:** If the Notes Selector does not appear when you display the Notes screen, you must exit the Notes screen. Then go to the General tab of the Preferences screen, and turn it on. See “How to turn the Notes Selector on or off” (p. 87).
3. Click **Open**.

### How to add or edit a tag on the Notes Selector screen

If you use a tag that is not on the Notes Selector screen, you can add a new tag to the list or edit an existing tag.

**Tip:** If you edit a tag on the Notes Selector screen, the program does not edit the tags that are typed in your notes. You have to display the Notes screen, and manually change the tags that have been typed in the notes.



### Steps

1. To add a new tag, from the Notes Selector screen, click **Add**. To edit an existing tag, click the tag you want to edit, and click **Edit**.
2. Type the tag.  
**Tip:** In the Notes Selector screen, a tag can have only one word. If a tag has more than one word, type a hyphen or underscore instead of a space.
3. Click **OK**.

### How to change the order of tags on the Notes Selector

You can change the order of the tags on the Notes Selector screen.

### Steps

1. From the Notes Selector screen, click the tag you want to move.
2. To move the selected tag higher on the list, click . To move the selected tag lower on the list, click .

### How to remove a tag from the Notes Selector

If you do not use a particular tag that is shown on the Notes Selector screen you can remove it from the list.

If you remove a tag from the Notes Selector screen it does not remove the tag from your notes.



### ***Steps***

1. From the Notes Selector screen, click the tag you want to remove.
2. Click **Remove**.
3. When the program asks you to confirm the deletion, click **Yes**.

### **How to return to the default list of tags**

By default, the Notes Selector screen contains the following tags:

- All
- BIOGRAPHY
- BIRTH
- CHRISTENING
- DEATH
- BURIAL
- MARRIAGE

You can quickly return to this list.

### ***Steps***

1. From the Notes Selector screen, click **Defaults**.
2. When the program asks you to confirm the action, click **Yes**.

---

# Using multimedia

You can add digitized pictures, sound clips, and video clips to the individual records and sources in a .paf file. These types of objects are called multimedia. You can view those pictures in scrapbooks and slide shows as well as include them on reports.

Adding multimedia to the .paf file aids research, provides entertainment, and educates your children and relatives.

**Tip:** You cannot add multimedia to marriage records.

The .paf file does not store the multimedia file itself; it stores only the path where the file can be found. This fact has the following implications:

- When you make a backup copy of the .paf file, only the links to the multimedia files will be included. You must use your operating system to back up your multimedia files.
- When you import or export a GEDCOM file, only the links to the multimedia files are included. To share a GEDCOM file with multimedia, you will need to give the receiver the GEDCOM file and copies of the multimedia files.
- You should store your multimedia files on your hard disk or on some other type of drive where you can store all of the files in one place. If you store multimedia files in more than one place, such as on several compact discs, you may have to switch discs to show scrap books and slide shows and to print reports with pictures. Also, digital cameras and companies that put pictures on compact discs use generic file names. This means that different photos on different compact discs may have the same name. If you do not give the photos unique names, the program cannot distinguish one photo from another. It will use the photo that is on the disc in the drive.

## Obtaining multimedia

Personal Ancestral File does not create multimedia files. To use multimedia files, you must obtain them elsewhere. For example:

- You can scan photographs or other items. If you will use the files in Personal Ancestral File only, you do not have to scan them at a high resolution or size.
- You can use a digital camera or camcorder and transfer the images to your computer.
- You can use your computer's sound recorder to create small sound files.
- Some film developers will put your photos on a compact disc when you develop your film. Personal Ancestral File accepts the Kodak format directly. If you use another brand, you can use other software to convert the file to a format that Personal Ancestral File accepts.
- You can obtain multimedia files from the Internet or from another person.

## Acceptable multimedia formats

You can add the following types of multimedia files:

### *Photos*

- Bitmap (.bmp)

- Comuserve PNG (.png)
- Encapsulated PostScript (.eps)
- JPEG (.jpg, .jff, .jtf)
- PCX (.pcx, .dcx)
- Kodak Photo CD (.pcd, .fpx)
- Tagged Image File format (.tif) (Many TIFF and most GIF images use LZW compression. This is a proprietary compression format, and the program does not accept it.)
- Windows metafile (.wmf, .emf)
- Windows metafile (.wmf, .emf)
- WordPerfect graphics (.wpg) (There are two types of WordPerfect graphics: raster and vector. The program accepts only raster images, which are really bitmaps. Vector images are more common, however.)
- Icons and cursors (.ioc, .cur)
- DICOM (.dic)
- Photoshop 3.0 (.psd)
- Truvision TARGA (.tga)
- SUN Raster format (.ras)
- Macintosh formats (.pct, .mac, .img, .msp)
- LEAD (.cmp)
- TIFF CCITT and other fax formats

### **Sound**

- Wave (.wav)
- MIDI (.mid, .rmi)

### **Video**

- Audio/Video (.avi, .mpg, .mov)

## **Managing multimedia files**

The easiest way to manage your multimedia files is to follow these guidelines:

- Give them each file a unique name that identifies its contents.
- If you have enough hard disk space, store your multimedia files in one folder on your computer's disk drive. Put that folder in the same folder where you store .paf files. For example, if you store your .paf files in C:\My Data\Genealogy, store your multimedia files in C:\My Data\Genealogy\Multimedia. This gives you the following advantages:
  - You always know where your multimedia files are. If you decide to include multimedia with a GEDCOM file, you can easily find and copy the multimedia files.
  - You never have to swap compact discs when displaying or printing information with multimedia files.
  - If you decide to include multimedia with a GEDCOM file, the GEDCOM file uses a relative path as the multimedia link. A relative path contains the name of the folder and the file name. The program assumes that the folder is in the

same drive and folder as the main file. In other words, the location of the multimedia file is relative to the location of the main file.

If you store your multimedia files in another place, then Personal Ancestral File must use an absolute path as the multimedia link. An absolute path contains the drive letter and the name of every folder where the multimedia file is stored.

When a GEDCOM file contains absolute paths as multimedia links, then the receiver will have to copy the multimedia files to exactly the same drive and folder where you stored them. If that person wishes to store the multimedia files elsewhere, then he or she will have to use Global Search and Replace to change the paths of the multimedia file names.

**Tip:** If you started using multimedia, did not follow these guidelines, and would like to start using them, you will need to find all individuals in a .paf file with multimedia files, move the multimedia files to a new folder, and change the location where Personal Ancestral File expects to find them.

See “Case Study: Finding all individuals with multimedia and moving all multimedia files to the same folder” (p. 110).

- If you do not have enough hard disk space, store your multimedia files on a compact disc, a zip drive, or on some other type of storage device. You must insert that storage device when you use Personal Ancestral File, or the program will not be able to display or print the multimedia files. You will have fewer problems if you store all multimedia files on one storage device, such as on one compact disc or one zip drive.

### Sharing multimedia

The .paf file does not store the multimedia file itself; it stores only the path where the file can be found. This fact has the following implications:

- When you make a backup copy of the .paf file, only the links to multimedia files will be included. You must use your operating system to back up your multimedia files.
- When you import or export a GEDCOM file that includes multimedia, you must also give the individual a copy of the multimedia files. That individual must then copy the multimedia files onto a drive and folder that his or her computer can use. It is helpful if you tell him or her the drive and folder(s) where you store your multimedia files. If the receiver copies the files onto the same drive and folder, the multimedia will appear. To store the files on another drive or in a different folder, the receiver will have to use the Global Search and Replace feature to change the drive and folders in the multimedia links.

**Tip:** To export and import multimedia files, you must use version 4.0.2 (or higher) of Personal Ancestral File. To find out what version you have, from the Help menu, select About Personal Ancestral File.



### How to add multimedia to individuals

You can attach multimedia files to individuals and sources.

To do so, you will need to:

- Access the Multimedia Collection screen of the individual or source.
- Choose the type of multimedia file.
- Find the multimedia file.
- Specify a caption and description.

### Steps

1. From the Individual screen, click **Options**, and select **Multimedia**. Or from the Family View screen, Pedigree View screen, or Individual View screen, select the individual. Then, from the **Edit** menu, select **Multimedia**.
2. Click **Add**.
3. Select the item type.
4. If you know the path and file name, type it. If you do not know the path and file name, click **Browse**, and find the file.
5. Type a caption. The caption is displayed in scrapbooks and on the Multimedia Collection screen. It can help you to better identify each item on the Multimedia Collection screen.
6. Type a description. The description can contain any information, such as the time the photo was taken, who participated in recording a sound clip, and so forth.
7. Click **OK**.  
**Tip:** In scrapbooks and slideshows, the multimedia items will appear in the order shown on the Multimedia Collection screen. To change the order, click an item. Then click  or  to move it up or down the list.
8. To select a default photo, click the photo on the list, and click **Make Default**.  
**Tip:** The default photo is marked with an asterisk (\*). You can print the default photo on reports, display it on the Family View screen, and include it on web pages.
9. Click **Save**.

### How to edit the item time, file, caption, and description

After you add a multimedia file to an individual record or source, you can:

- Specify a default photo.
- Change the item type, file, caption, and description.
- Edit the photo.

### Steps

1. From the Individual screen, click **Options**, and select **Multimedia**. Or from the Family View screen, Pedigree View screen, or Individual View screen, select the individual. Then, from the **Edit** menu, select **Multimedia**.
2. To change the default photo, in the Media Item box click the appropriate photo, and click **Make Default**.  
**Tip:** The default photo can be displayed on the Family View screen, printed on reports, and included in web pages.
3. To change the item type, file name, caption, or description, click **Modify**.

### How to remove multimedia from an individual

After you have linked a multimedia file to an individual or source, you can remove it. When you remove a multimedia file, you simply remove the link to the multimedia file. You do not delete the multimedia file from your hard disk.

### *Steps*

1. From the Individual screen, click **Options**, and select **Multimedia**. Or from the Family View screen, Pedigree View screen, or Individual View screen, select the individual. Then, from the **Edit** menu, select **Multimedia**.
2. Click the multimedia file you want to remove.
3. Click **Remove**.
4. The program asks if you want to remove the link to the item. Click **Yes**.

### **How to edit a photo**

You can change how a photo looks:

- You can crop the photo.
- You can change the direction that the photo faces.
- You can choose to include or exclude the photo from a slide show or scrapbook.
- You can attach a sound to a photo. You can then play this sound when you view the scrapbook.

### *Steps*

1. From the Individual screen, click **Options**, and select **Multimedia**. Or from the Family View screen, Pedigree View screen, or Individual View screen, select the individual. Then, from the **Edit** menu, select **Multimedia**.
2. Click **Edit Photo**.
3. If needed, crop the photo.
4. Click the upper-left part of the photo you want to keep.
5. While you hold the mouse button down, drag the cursor to the lower-right part of the photo you want to keep.
6. Release the mouse button.  
**Tip:** To make small adjustments to the cropping, use the items in the **Crop From** box on the screen. If you do not like the cropped photo, click **Reset**. The photo returns to its original size.
7. If needed, use the buttons at the bottom of the displayed photo to rotate the photo until the correct side is up.
8. Select the Slide Show options.
9. Select the Scrapbook options.

### **How to assemble and view scrapbooks**



The scrapbook displays 6 of an individual's photos at a time along with each photo's description. If an individual has more photos, you can use the right and left arrow buttons in the lower corners of the Scrapbook screen to move from page to page.

The scrapbook does not contain video clips. It contains audio clips only if you attach them to photos, as described below in step 4.

If you attach an audio clip to a photo and then view the scrapbook, a button that looks like a speaker appears next to the photo. You can click the button to hear the audio clip.

**Tip:** You can also print scrapbook pages. The printed version contains photos only. See "How to print scrapbook pages" (p. 131).

### Steps

1. Select the individual about whom you want to create a scrapbook.  
**Tip:** If you want to include more than one individual, you have to attach all of the pictures to one individual. You cannot combine the pictures from more than one individual into one scrapbook.
2. From the Individual screen, click **Options**, and select **Multimedia**. Or from the Family View screen, Pedigree View screen, or Individual View screen, select the individual. Then, from the **Edit** menu, select **Multimedia**.
3. If needed, add the pictures to the individual. See “How to add multimedia to individuals” (p. 92).
4. To attach a sound to the photo:
  - a. From the Multimedia Collection screen, click **Edit Photo**.
  - b. If you know the path and file name, type it in the Attached Sound field. Or if you do not know the path and file name, click **Browse**, and find the file.
  - c. Click **OK**.
5. In the scrapbook, the multimedia items will appear in the order shown on the Multimedia Collection screen. To change the order, click an item. Then click  or  to move it up or down the list.
6. To view the scrapbook, click **Scrapbook**.

### How to assemble and view slideshows

A slideshow displays all of the multimedia that is attached to an individual. It displays each item for a specific amount of time, in a sequential fashion.

You view slideshows on your computer. If you have the appropriate projection and sound equipment attached to your computer, you can show them to groups.

On the Preferences screen, on the Multimedia tab, you can set the background color of the slideshow, the size that each item will be displayed at, and the default amount of time each item will appear.



See “How to set preferences on the Multimedia tab” (p. 156).

As described below in step 4, you can also determine the following settings:

- Whether the item should be included in the slideshow.
- Whether the item should be displayed for a different amount of time than is specified in the preferences.

### Steps

1. Select the individual about whom that you want to create a slideshow.  
**Tip:** If you want to include more than one individual, you have to attach all of the multimedia files to one individual. You cannot combine the multimedia files from more than one individual into one slideshow.
2. From the Individual screen, click **Options**, and select **Multimedia**. Or from the Family View screen, Pedigree View screen, or Individual View screen, select the individual. Then, from the **Edit** menu, select **Multimedia**.
3. Add the multimedia files to the individual. See “How to add multimedia to individuals” (p. 92).
4. To specify that the item should not be included in the slideshow, or to specify that the item should be displayed for a different amount of time than the default, follow these steps:

- a. From the Multimedia Collection screen, click **Edit Photo**.
  - b. If you do not want to include the photo in the slideshow, unmark **Include in Slideshow**.
  - c. If the item should be displayed for a different amount of time than the default, type the number of seconds.
  - d. Click **OK**.
5. In the slideshow, the multimedia items will appear in the order shown on the Multimedia Collection screen. To change the order, click an item. Then click  or  to move it up or down the list.  
**Tip:** If you want a sound clip, to play during the slideshow, put it at the top of the list of multimedia items. The sound clip plays until it reaches a video clip or another sound clip.
6. To view the slideshow, click **Slide Show**.



---

# Tracking contact information

For each individual record in the .paf file, you can track the name, address, telephone number, e-mail address, and home page of an individual whom you can contact for more information. This could be:

- The individual shown on the Individual screen.
- An individual who has information about the individual
- An individual who knows how to contact the individual.

If you include contact information, you can:


- Print it on individual summaries, custom reports, and lists of family reunion contacts.
- Export it.
- Create focus lists that contain individuals with the same contact information.

Before you share contact information on a printout or in a GEDCOM file, please obtain the individuals' permission. Some people may not want you to share their name and address with others they may not know.

## How to add, edit, and delete contact information

The steps to add, edit, and delete contact information are nearly the same.

### *Steps*

1. On the Individual screen, click  .
2. Type the name, address, and other information. To delete the contact information, delete all of the information in all of the fields.
3. When you are finished, click **OK**.

---

# Finding individuals in a .paf file

When you need to find an individual in a .paf file, you can use one of these methods:

- You can return to the home person.
- You can select the individual from a list.
- You can type the RIN or MRIN.
- You can select a couple from a list.
- You can select an individual's descendant from list.

## How to find the home person

When you get lost, you can quickly return to a more familiar place by finding the home person.

The home person is the individual that displays in the primary position when you open the .paf file.

By default, the home person has RIN 1. On the Preferences screen, on the File tab, you can change the home person.

### *Steps*

1. From the **Search** menu, select **Home Person**.
2. If this does not display the correct person, you need to change the preferences on the File tab. See “How to set preferences on the File tab” (p. 152).

## How to find an individual on a list

If you want to find an individual in the .paf file but do not know his or her RIN, use the Individual List feature. It displays all of the individuals in the .paf file. You can then select an individual and display him or her on the Family View screen, Pedigree View screen, or Individual View screen.

**Tip:** You can also use the Individual View screen to find an individual.

See “Using the Individual View screen” (p. 28).

### *Steps*

1. From the **Search** menu, select **Individual List**.
2. If you want the list to be sorted alphabetically, click **Alphabetical**. Or if you want the list to be sorted by RIN, click **RIN**.

**Tip:** To quickly scroll through the list, type the surname. The program finds each letter as you type it in the text field. If the list is sorted by RIN, type the RIN.

3. Click the individual.
4. Click **OK**.

## How to find an individual by RIN or MRIN

If you know an individual's RIN or MRIN, you can quickly find him or her in the .paf file.

**Tip:** If you want to see a list individuals sorted by RIN, you can use the Individual View screen.

See "Using the Individual View screen" (p. 28).

### Steps

1. From the **Search** menu, select **Find by RIN/MRIN**.
2. If you want to type a RIN, click **Individual RIN**. Or if you want to type an MRIN, click **Marriage RIN**.
3. Type the RIN or MRIN.  
**Tip:** If you cannot remember the RIN or MRIN, click **Individual List** or **Descendancy List**.
4. Click **OK**.

## How to find a couple

If you want to find a couple in the .paf file but do not know the MRIN, use the Marriage List feature. It shows all of the couples in that .paf file. You can then select a couple and display them on the Family View screen or Pedigree View screen. The husband will be in the primary position.

### Steps

1. From the **Search** menu, select **Marriage List**.
2. Select the couple you want to find.  
**Tip:** If an individual's name is blank, the individual is listed as "Unknown."
3. Click **OK**.

## How to find an individual's descendants

If you want to find an individual's descendant, use the Descendancy List. It shows three generations of an individual's descendants. You can then select an individual and display him or her on the Family View screen or Pedigree View screen.

### Steps

1. From the Family View screen or the Pedigree View screen, select the individual whose descendants you want to see.
2. From the **Search** menu, select **Descendancy List**.
3. Click the name of the individual you want to find:
  - When < appears next to an individual's name, it means that the individual has descendants. Click the individual to view the descendants in the list.
  - To view an individual's spouse in the list, click the individual's name. To view the spouse's family, click the spouse's name.
  - To see the parents of the first individual on the list, click that individual.
4. Click **OK**.

---

# Creating focus lists

A focus list is a group of individuals that are stored in the .paf file who have something in common. You can use the Advanced Focus/Filter feature to create focus lists.

Focus lists can help you work on your family history. For example, you might want to find the following types of lists:

- Individuals who were born in the same place. If you printed this list, you could use it to search census records, parish records, and other records that contain information about individuals who lived in the same place.
- Individuals for whom you lack certain types of information, such as a birthplace. During your next research session, you could try to find this information.
- Individuals who have certain words in their notes. This might help you identify information in your notes that could be moved to custom events.
- Individuals in a certain family line. You could then create a GEDCOM file that contains those records for a relative.

## What you can do with a focus list

After you create a focus list, you can use it many ways:

- You can print individual summaries, calendars, scrapbooks, and custom reports for the individuals in the focus list. For example, you can select all of your grandchildren and print them on a birthday or anniversary calendar. Or you could select all of your mother's ancestors who were born in France between 1820 and 1862 and create a custom report listing just those individuals.
- You can create web pages that contain individuals in a focus list.
- You can create a GEDCOM file that contains a common line of ancestors for a relative.
- You can split a .paf file along family lines.
- You can select names to submit for temple work.
- You can find individual records that need the same correction. You can then edit each record.
- You can delete the records. This is useful if you want to delete many records in the .paf file at the same time.

## How to create a focus list

When you create a focus list, you can use two types of filters:

- **Relationship filters** select individuals and those who are related to them.
- **Field filters** select individuals who have similar information in fields in the individual record, marriage record, notes, or sources.

**Tip:** Mark the Show Results Only option to see only the selected individuals.

### Steps

1. From the **Search** menu, select **Advanced Focus/Filter**.
2. If you want to use a relationship filter, select the one that you want:
  - a. Click the individual that you want to use.
  - b. From the Relationship Filter box, select the filter you want to use. See “Choosing a relationship filter” (p. 103).
  - c. Click **Select**.  
**Tip:** Next to each selected name, a » will appear. The total number of individuals who were selected by the relationship filter appears at the bottom of the Relationship Filter box.
  - d. If you want to use another relationship filter, repeat steps a to c.
3. If you want to use field filters, select **AND**, **Or** or **NOT** to combine the filters. See “Combining relationship filters and field filters” (p. 103).
4. If you want to use field filters, define them:
  - a. Click **Define**.
  - b. In the Possible Fields box, click a field that you want to include in your filter.
  - c. Click >.
  - d. Fill out the filter.  
**Tip:** In place and name filters, you can type an asterisk to replace letters that can vary or that you do not know. For example, you can type **Johns\*** to find Johnson, Johnstone, Johnsen, and so forth.
  - e. If you want to add another field to the filter, use **AND**, **Or** and ( ) to combine the filters. See “Combining field filters” (p. 105).
  - f. Repeat steps b to e for all of the other filters you want.  
**Tip:** If you have just created a complex field filter, you could save it for later use. To do so, click **Save**, and type a name for the filter.
  - g. When you are finished, click **OK**.  
**Tip:** Next to each selected name, a » will appear. The number of individuals that were selected by the field filter appears at the bottom of the Field Filter box. The total number of individuals who are selected by both filters appears at the bottom of the Filtered List box.

### How to view the individuals in a focus list

The list of individuals normally contains everyone in the .paf file. After you create a focus list, you can see which individuals were selected for the list, to verify that you selected the correct individuals.

Toward the bottom of the screen, three boxes list different totals of individuals:

- **Relationship Filter.** This box lists the number of individuals who were selected by the relationship filter.
- **Field Filter.** This box lists the number of individuals who were selected by the field filter.
- **Filtered List.** This box lists number of individuals who were selected by both filters. This is the total number of individuals in the current focus list.

### *Steps*

1. If you have not yet done it, create the focus list. See “How to create a focus list” (p. 100).
2. To move the highlight bar to the next individual in the focus list, click **Next>>**. Or to move the highlight bar to the previous individual in the focus list, click **Prev>>**.  
**Tip:** To display only the individuals in the focus list, click **Show Results Only**.

### **How to save focus lists**

After you create a focus list, you could save it for later use. When you no longer need it, you can delete it.

**Tip:** When you save a focus list, the list remains as it is. If you later add individuals to the .paf file who logically belong in that focus list, they are not added unless you create the list over again.

### *Steps*

1. Select a group of individuals with the Advanced Focus/Filter feature.
2. Click **Save**.
3. Type a name for the group.
4. Click **OK**.  
**Tip:** If you are saving a new list with the same name that you used for a previous list, click **Overwrite**.

### **How to retrieve and delete focus lists**

If you have saved a group of individuals, you can retrieve that group.

### *Steps*

1. From the Advanced Focus/Filter feature, click **Retrieve**.
2. Click the list you want.
3. To open the list, click **Open**. Or to delete the list, click **Delete**.  
**Tip:** When you delete the list, it does not delete the individuals from your file.

## Combining relationship filters and field filters

When you use both relationship and field filters, you use the following options (called *logic operators*) to combine them:

	When to Use	Example	Results
AND	Use AND to select individuals who match both the relationship filter and field filter. This search usually finds fewer records than OR.	You select Ancestors as the relationship filter. You combine the searches with AND. You define a field filter that specifies that the birthplace is México.	The program selects only the individual's ancestors who were born in México.
OR	Use OR to select individuals that match either the relationship filter or the field filter. This search usually finds more records than AND.	You select Ancestors as the relationship filter. You combine the searches with OR. You define a field filter that specifies that the birthplace is México.	The program selects all of the individual's ancestors and anyone who was born in México.
NOT	Use NOT to select all individuals who match the relationship filter except those who match the field filter.	You select Ancestors as the relationship filter. You combine the searches with NOT. You define a field filter that specifies that the birthplace is México.	The program selects all of the individual's ancestors except those who were born in México.

## Using relationship filters

Use relationship filters to select:

- One individual at a time.
- An individual and his or her spouse.
- An individual and his or her family.
- An individual and his or her descendants or ancestors.
- Everyone in the .paf file. You can then deselect the individuals you do not want. This option may save you time if the .paf file is large and you want to list most but not all of your records.

### Choosing a relationship filter

You can use nine relationship filters. You can use each relationship filter more than once and in any combination.

- **Individual.** Use this relationship filter to select only the highlighted individual.

- **Couple.** Use this relationship filter to select an individual and his or her spouse. If the individual is linked to more than one spouse, you can select a specific spouse or all spouses.
- **Family.** Use this relationship filter to select an individual and his or her immediate family. If the individual has more than one family (such as one family with parents and siblings and another family with spouse and children), you can select all families or a specific family.
- **All.** Use this relationship filter to select everyone in the .paf file. This relationship filter is useful if you want to select everyone in your file except for a certain line or family. You select everyone and then use another relationship filter to deselect the ones you do not want.
- **All Related.** Use this relationship filter to select an individual and everyone related to him or her, including ancestors, descendants, siblings, aunts, uncles, spouses, and in-laws. It may select everyone in the .paf file.
- **Ancestors.** Use this relationship filter to select an individual and his or her spouse, parents, siblings, and direct-line ancestors. You can decide how many generations of ancestors, how many generations of descendants, whether to include spouses, and whether to include all parents or only the primary parents.
- **All Ancestors Related.** Use this relationship filter to select an individual and his or her parents, siblings, and ancestors; all of the ancestors' siblings, parents, children, and spouses; and each one of those individual's ancestors. This search gives you an individual's direct line and all collateral lines. If two or more lines have intermarried, this relationship filter gives the same results as the All Related relationship filter, and it may select everyone in the .paf file.
- **Descendants.** Use this relationship filter to select an individual and his or her descendants. You select how many generations to include and whether to include spouses.
- **All Descendants Related.** Use this relationship filter to select an individual and his or her all descendants of the individual, and the descendants' siblings, parents, children spouses, and each one of those individual's ancestors. If two or more lines have intermarried, this relationship filter gives the same results as the All Related relationship filter, and it may select everyone in the .paf file.

## Using field filters

Field filters allow you to find records that have the same or similar information. For example, you can find:

- All records with the same word or combination of words. You could, for example, find everyone who was buried in the same cemetery or everyone who has the same given name.
- All records before (or after or about) a certain date. For example, you can find all individuals who were born before 1900 or all individuals who died between 1850 and 1900.
- All records that have "Sub 1994" in the Baptism date field.
- All records with information in a specified field. You could, for example, find every record that has an Ancestral File number. This would quickly identify every record in the .paf file that came from Ancestral File.
- All records that are missing information in a specified field. For example, you could find all records that have no birth date.
- All records with the same word or combination of words in the notes.



- All records that cite the same source.
- All individuals who are linked to more than one spouse or set of parents.
- All individuals who are married or divorced.
- All individuals who have multimedia.

### Combining field filters

When you select more than one field for a filter, you must use the following options (called *logic operators*) to combine them:

	When to Use	Example	Results
And	Use <b>And</b> when you want to find records with all the specified words or dates. This search usually finds fewer records than Or.	Name (surname only) equals García And Birthplace equals México	The program finds only individuals who have García marked as the surname and who were born in México.
Or	Use <b>Or</b> when you want to find records with any (one or more) of the specified words or dates. This search usually finds more records than And.	Name (surname only) equals García Or Birthplace equals México	The program finds individuals who have García marked as the surname (regardless of where they were born) and individuals who were born in México (regardless of their names).
()	Use parentheses when you want the filter to use a particular field or combination of fields before using other fields in the filter.	( Surname equals García And Birthplace equals México ) And Birth Date is less than 1890	First the program finds only individuals who have García marked as the surname and who were born in México.  From the list of individuals who match the above criteria, the program selects only those who were born before 1890.

### Filling out field filters

Use the field filter screen to specify the information that you want to find.

You will specify the following information:

- Whether and how the information that you type should match the information found.  
**Tip:** To find all records that contain information in a specified field, select the Exists option. (In Personal Ancestral File 3.0 and earlier, you typed an asterisk.)

To find blank fields, select the Does Not Exist option. (In Personal Ancestral file 3.0 and earlier, you typed EMPTY.)

- What information should be found.

**Tip:** In field filters for names and places, you can type an asterisk to replace letters that can vary or that you do not know. For example, you can type Johns\* to find Johnson, Johnstone, Johnsen, and so forth.

### How to define a field filter

Field filters allow you to find records that have the same or similar information.

#### Steps

1. From the Advanced Focus/Filter screen or the Select Set of Individuals screen, click **Define**.
2. In the Possible Fields box, click a field that you want to include in your filter.
3. Click >.
4. Fill out all information needed for the filter.  
**Tip:** In place and name filters, you can type an asterisk to replace letters that can vary or that you do not know. For example, you can type **Johns\*** to find Johnson, Johnstone, Johnsen, and so forth.
5. If you want to add another field to the filter, use **AND**, **OR**, and ( ) to combine the filters. See “Combining field filters” (p. 105).
6. Repeat steps 2 to 5 for all of the other filters you want.  
**Tip:** If you have just created a complex field filter, you could save it for later use. To do so, click **Save**, and type a name for the filter.
7. When you are finished, click **OK**.

### How to save field filters

When you create a complex field filter, you could save it for later use.

#### Steps

1. Create the field filter.
2. Click **Save**.
3. Type a name for the field filter.
4. Click **OK**.

### How to retrieve field filters

If you have saved a field filter, you can retrieve it and use it again.

#### Steps

1. From the **Search** menu, select **Advanced Focus/Filter**.
2. Click **Define**.
3. Click **Retrieve**.
4. Select the field filter that you want.
5. Click **Open**.

### How to delete field filters

If you no longer need a field filter that you saved, you can delete it.

#### Steps

1. From the **Search** menu, select **Advanced Focus/Filter**.
2. Click **Define**.
3. Click **Retrieve**.
4. Select the field filter that you want.
5. Click **Delete**.
6. When the program asks you to confirm the action, click **Yes**.

### Examples of using Advanced Focus/ Filter

#### Case Study: Editing a group of records

If a surname has been misspelled on many records, you can use the Advanced Focus/Filter feature to quickly identify and correct them.

1. From the **Search** menu, select **Advanced Focus/Filter**.
2. On the Advanced Focus/Filter screen, click **Define** to use field filters.
3. From the Possible Fields box, select **Name**.
4. On the Name Field Filter screen, select the following options:
  - In the Part of Name box, click **Surname**.
  - In the drop-down box, select **Matches**.
  - In the Text field, type the misspelled name.
  - To run the field filter, click **OK**.
5. Since the .paf file is large, click **Show Results Only**.
6. Click the first name in the list, and click **Edit**.
7. Make the needed correction. Then to save time, highlight the corrected name and press **Ctrl+C** to copy the correct name into memory.
8. To save the correction and return to the Advanced Focus/Filter screen, click **Save**.
9. Click the next individual, and click **Edit**.
10. In the Full Name field, highlight the incorrect surname, and press **Ctrl+V** to paste the correct name in the field. Click **Save** to return to the Advanced Focus/Filter screen.
11. Continue until you have corrected each name.

#### Case Study: Deleting a group of records

You imported a GEDCOM file and discover that it contains a line of individuals that you do not want in the .paf file. You want to delete them all at once.

1. Make a backup copy of the .paf file, just in case something goes wrong.
2. Print pedigree charts that show the individuals that you want to delete.
3. Click the first individual that you want to delete. (Select the individual who was born most recently, so that you can select all of the ancestors at once.)
4. In the Relationship Filter box, select **Ancestors**.
5. Click **Select**.
6. On the Ancestors screen, click **OK**.

7. Mark **Show Results Only**.
8. Carefully compare the names on the list against the printout. If you find an individual that you do not want to delete, follows this process:
  - Click the individual.
  - In the Relationship Filter box, select the Individual option.
  - Click the Deselect button.
9. When you are sure that you want to delete all of the individuals on the list, click **Delete**.

### Case Study: Identifying missing information

You want to print individual summaries for all individuals in your mother's direct line who lack a birthplace. During your next research session, you will try to find that information.

1. On the Reports and Charts screen, click the **Individual Summary** tab.
2. To select the individuals, mark the **Use List**.
3. On the Select Set of Individuals screen (which is the same as the Advanced Focus/Filter screen), click your mother.
4. In the Relationship Filter box, select **Ancestors**
5. Click **Select**.
6. On the Ancestors screen, indicate that you want to select only 5 generations of ancestors and 2 generations of descendants. Also indicate that you want to include spouses but not all of the parents. Click **OK** to continue.
7. Since you will use a field filter, select **And** to combine the filters.
8. Click **Define** to use a field filter.
9. From the Possible Fields box, click **Birth Place**, then **>**.
10. In the Options field, select **Does Not Exist**.
11. To return to the Reports and Charts screen, click **OK**.
12. Select the options that you want for the report, and click **Preview**.
13. To print the reports, click **Print**.

### Case Study: Preparing for a research trip

You plan to visit to a county where your ancestors came from and you want to take a list of the individuals who were born or buried there.

1. On the Reports and Charts screen, click the **Custom** tab.
2. To select the individuals, click **Select**.
3. On the Select Set of Individuals screen (which is the same as the Advanced Focus/Filter screen), click **Define** to use a field filter.
4. From the Possible Fields box, select **Burial Place**.
5. On the Burial Place Field Filter screen, define the information that you want to find.
  - In the Options field, select **Contains**.
  - In the Place field, type the name of the county.
6. Since you want to find people who were born or buried there, click **Or** then **>**.

7. From the Possible Fields box, select **Birth Place**.
8. On the Birth Place Field Filter screen, define the information that you want to find.
  - In the Options field, select **Contains**.
  - In the Place field, type the name of the county.
9. Click **OK**. The program selects 154 individuals.
10. To return to the Reports and Charts screen, click **OK**.
11. To select the fields for the report, click **Fields**. Select the following fields:
  - Surname, Given
  - Birth date
  - Death date
  - Burial date
  - Father
  - Mother
12. Click **OK**.
13. To sort the list, click **Sort Order**, and select **Surname/Given**.
14. To view the report, click **Preview**.
15. To print the report, click **Print**.

### **Case Study: Printing a list of contact information**


You can't print a list of contact information so that you can call or send an e-mail to many of them.

1. From the **File** menu, select **Print Reports**.
2. On the Reports and Charts screen, click the **Custom** tab.
3. To select the individuals, click **Select**.
4. On the Select Set of Individuals screen (which is the same as the Advanced Focus/Filter screen), click **Define**.
5. From the Possible Fields box, select **Contact Name**.
6. From the drop-down box, select **Exists**.
7. To run the field filter, click **OK**.
8. To return to the Reports and Charts screen, click **OK**.
9. To select the fields for the report, click **Fields**. Select the following fields:
  - Contact name
  - Contact phone
  - Contact E-mail
  - Surname/Given
10. Click **OK**.
11. To sort the list, click **Sort Order**, and select **Contact Name**.
12. To view the report, click **Preview**.
13. You notice that the e-mail column is too short. To correct this, follow these steps:
  - Click **Close** to return to the Reports and Charts screen.

- Click **Fields**.
  - Click **Contact E-mail**.
  - Click **Column Options**.
  - In the Width field, type a larger number of characters.
  - Click **OK** twice to return to the Reports and Charts screen.
14. Click **Preview** to be sure that the e-mail addresses print correctly.
  15. To print the report, click **Print**.

### **Case Study: Finding all individuals with multimedia and moving all multimedia files to the same folder**

To more easily share multimedia files with others, you want to move all of your multimedia files to one folder that is in the same folder as your .paf file.

1. Find all individuals in the .paf file with multimedia:
  - a. From the **Search** menu, select **Advanced Focus/Filter**.
  - b. If a number greater than 0 appears after the word Selected in the Relationship Filter box, click the **Clear** button in that box.
  - c. If a number greater than 0 appears after the word Matches in the Field Filter box, click the **Clear** button in that box.
  - d. In the Field Filter box, click **Define**.
  - e. In the Possible Fields box, select **Multimedia**.
  - f. Click **>**.
  - g. Leave the Exists option selected, and click **OK**.
  - h. Click **OK**.
  - i. Wait for the filtering to occur.
2. Select the **Show Results Only** option.
3. Click the first individual on the list.
4. Click **Edit**.
5. Click  .
6. Look at the Location field, which is located beneath the list of media items:
  - If the location begins with a drive letter and contains one or more folder names, this multimedia file uses an absolute path. For example, C:\My Pictures\Genealogy\ is an absolute path.
  - If the location begins with a backslash and lists a folder name, this multimedia file uses a relative path. For example, \Multimedia is a relative path.
7. On a piece of paper, write the drive and folders of each absolute path that you find. You do not need to write down the name of the file. (The name of the file is the last part of the name that follows the final backslash.)
8. Click the next item in the media list, and repeat steps 6 and 7.
9. When you have checked each multimedia item for this individual, click **Cancel**.
10. Click the next individual on the Find Individual screen, and repeat steps 4 through 9.
11. When you have looked at all individuals with multimedia, click **Cancel**.

12. Using your Windows operating system, create a folder named Multimedia in the same folder where you store the .paf file.
13. Again using your Windows operating system, copy each multimedia file used in the .paf file into the new Multimedia folder.

**Important:** If you do not have a current backup copy of your .paf file, make one before you continue.

14. Use Global Search and Replace to change the multimedia file:
  - a. From the **Tools** menu, select **Global Search and Replace**.
  - b. From the Search and Replace Text In drop-down box, select **Multimedia File Names**.
  - c. In the Search For field, type the first drive and folder name on your list. Be sure to include the last backslash. For example, if a file used to be in C:\My Pictures\Genealogy\, type: **C:\My Pictures\Genealogy\**
  - d. In the Replace With field, type the new path where the multimedia files are stored. Be sure to type the final backslash. For example, if the multimedia files are stored in a folder named Multimedia, then type: **\Multimedia\**
  - e. Click **Replace**.
  - f. Repeat steps a to e for each item on your list.

---

# Importing GEDCOM files

An efficient way to add information to the .paf file is to import a GEDCOM file that contains information you need.

GEDCOM files may come from another family member, from Ancestral File, from Pedigree Resource File, from a genealogical .paf file, or from some other source.

## How to import GEDCOM files

When you import a GEDCOM file, all of the information from the GEDCOM file is added into the .paf file.

To preview the data, you could import the GEDCOM file into an empty .paf file. From there, you can correct or change information or select specific individuals and family lines to import into the .paf file. If you change information in the new .paf file, you need to create a new GEDCOM file to import the information into your actual .paf file.

**Note:** You can also import an .oup file that was created in TempleReady for Windows.

See “How to add TempleReady updates (.oup files)” (p. 125).

### *Steps*

1. From the **File** menu, select **Import**.
2. Select the drive and folder where the file is located.
3. Select the file.
4. Click **Import**.
5. Choose the import options that you want.
6. To import the file, click **OK**.
7. The program opens a text editor to display an import log. You can print this report.
8. To close the box that tells you how many individuals were imported, click **OK**.  
**Tip:** To import the file into a new .paf file, you must first create a new .paf file and then import the file into it.
9. The program asks if you want to view instructions on how to link the data you imported. Click **Yes** or **No**.  
**Tip:** If you click **Yes**, the help system opens to a topic that is titled “Working with imported information.” See “Working with imported information” (p. 112).

## Working with imported information

After you import information, remember the following guidelines:

- If you are importing the data into a new .paf file, the first individual you see is the individual with the lowest RIN in the imported GEDCOM file.
- If you do not see arrows indicating that there were ancestors or descendants or if you do not see the individuals that you expected, use the Individual View screen to see if they are in the .paf file.



- If the surnames you imported are in all uppercase letters, you can change them to mixed case letters. See “How to change surnames to mixed case” (p. 164).
- The data you just imported will not automatically link itself to any data that you already have. To link individuals, you can use one of the following methods:
  - If you do not have information about the individuals you imported, you will need to add them to the families where they belong. For example, suppose that you do not have information about the parents of Heinrich Brandt, but then you find and import information about them. The records are in the .paf file, but they are not linked to Heinrich. To link them to Heinrich, move him to the primary position. From the Add menu, select Parents. Then click the Select Existing Individual button, and find the parents. If the parents are not linked, you can then add the spouse and marriage record.
  - If you imported information about individuals who are already in the .paf file, you can use the Match/Merge feature to combine the records. For example, if you have an individual named Heinrich Brandt in the .paf file and import more information about him and his parents, the .paf file will have two records for Heinrich Brandt and each of his parents. Use the Match/Merge feature to merge the information from the new records into the records you already have in the .paf file. The duplicates will be removed, and the family links will be formed.

If the GEDCOM file has multimedia files, you must also copy the multimedia files onto a drive that your computer can use. You must either copy these files into the same drive and folder where the individual who created the GEDCOM file stored them or use the Global Search and Replace feature to change the drive and folders of the multimedia files to reflect where you stored the files.

---

# Sharing your information with others (Exporting GEDCOM files)

After you have typed information into the .paf file, you could share it with other people. To do so, you need to export it or copy it into a format that other computer genealogy programs can use. This format is called GEDCOM.

You can share your information in a variety of ways:

- You can give a GEDCOM file to another individual.
- You can include a GEDCOM file on a web site.
- You can submit information to Ancestral File.
- You can submit information to Pedigree Resource File.
- You can submit names for temple ordinances.

## What is GEDCOM?

When you export information from the .paf file, you create a GEDCOM file.

GEDCOM is a computer format that permits one type of software program to read genealogical records created in another program. GEDCOM was created by The Church of Jesus Christ of Latter-day Saints to make it possible for individuals with different brands of software and computers to share their information. You can recognize a GEDCOM file on your computer because its file name ends with “.ged.”

### *When should you use GEDCOM?*

Use GEDCOM in the following instances:

- When you want to submit information to Ancestral File or Pedigree Resource File.
- When you want to submit names for temple ordinances.  
**Tip:** The Windows version of TempleReady can work directly with a .paf file. If the .paf file fits on one floppy disk or if TempleReady is on the same computer as the .paf file, you do not have to create a GEDCOM file to submit names for temple work. If the .paf file does not fit on one floppy disk, save a backup copy onto a floppy disk. Restore the backup copy onto a computer with TempleReady.
- When you want to share information with someone who uses a genealogical computer program that can read GEDCOM files.
- When you want to split a .paf file into two or more separate .paf files.

You should not use GEDCOM if:

- The party that you want to share information with does not use a computer program that reads GEDCOM files. Instead, consider giving the other individual printouts from the .paf file.
- You want to make a backup copy of the .paf file. Instead of just copying the .paf file to another location, use the Backup feature so that the file size will be smaller.

## Creating GEDCOM files

You can create GEDCOM files to share with other individuals and programs, including:

- Personal Ancestral File 2.1 to 5.0.
- Ancestral File or Pedigree Resource File
- TempleReady
- Any genealogical computer program that accepts either GEDCOM 4.0 or GEDCOM 5.5.

Before you can share information with other individuals, you should know which version of GEDCOM their computer programs use. If you do not know this information, you should contact them before creating the file.

**Tip:** If you have multimedia files in the .paf file, Personal Ancestral File does include the links to those files in the GEDCOM file. A link consists of the drive, folder(s), and file name. If you share a GEDCOM file with another individual, also send copies of the multimedia files. To view the multimedia files correctly, the receiver must either copy the multimedia files into the same drive and folder where you store your multimedia files or use the Global Search and Replace feature to change the drive and folders of the multimedia files.

### Understanding UTF8, Unicode, ANSEL, and ANSI

When you select the Other GEDCOM 5.5 option, you need to select which character set you will use. The character sets are different standards that are used to store characters in a computer. Personal Ancestral File allows you to create GEDCOM files in UTF8, Unicode, ANSEL, and ANSI.

Select ANSEL unless you know that the other person uses a program that requires ANSI or unless you have Cyrillic characters or nonroman characters (such as Japanese, Chinese, Korean, Arabic, Hebrew, or Cyrillic) in the .paf file.

Select UTF8 or Unicode if the .paf file contains nonroman characters (such as Japanese, Chinese, Korean, Arabic, Hebrew, or Cyrillic).

**Note:** If you use a character in a .paf file that is not included in one of these standards, the character will not be copied into the GEDCOM file.

### Programs that accept GEDCOM 5.5

Some of the newest programs accept UTF8 or Unicode. The following programs accept GEDCOM 5.5 and require the ANSEL character set.

**Note:** If the program you need is not on this list, ask the other person to find out what version of GEDCOM and what character set you should use.

- Ancestral Quest 2.1 and higher.
- Ancestors and Descendants 1.4 and higher. In the Char Set drop-down box, select ANSI..
- Brothers Keeper 5.2g.
- Cumberland Family Tree 2.51.
- DISGEN 7.0e.
- DoroTree 1.2 and higher.
- Dynas Tree 200.
- Everyone's Family Tree 3.03a.
- EZITREE Windows Family History 6.48.

- Family Origins, version 6.0 and higher. In the Char Set drop-down box, select ANSI.
- Family Reunion 97.1. In the Char Set drop-down box, select ANSI.
- Family Ties 4.0.
- Family Treasures 2.01.
- Family Tree Maker Exchange Utility, 7.5.
- FTREE 1.4.
- GEDitCOM 2.8.
- Genealogical Information Management 3.2.
- Genealogia 3.1.
- Griot Alternative 3.15.
- Generations Family Tree, version 8.0. In the Char Set drop-down box, select ANSI.
- Kindred Konnections (myTrees.com).
- Kith and Kin Pro 1.0 and higher.
- The Master Genealogist, versions 3.x and higher.
- Legacy, version 2.0.
- Reunion 3.0.
- Roots IV.
- Tree Draw 2.0.
- Ultimate Family Tree 3.0.

### **How to create GEDCOM files**

The best way to share your information with other individuals is usually to create a GEDCOM file. When you use GEDCOM, you can control:

- Which individuals, families, and ancestral lines are included.
- How much information about living individuals is included.
- Whether notes, sources, multimedia, contact information, submitter information, and confidential information are included.

If you will send the GEDCOM file to someone who does not need the information about individuals who may still be alive, please mark the Full Information on Living option. When you mark this option, the program checks each individual that you select. If one of the following conditions is met, the program considers that the individual is deceased:

- If the individual's record contains the following death or burial information: date, place, or source citation.
- The individual was born or christened at least 110 years ago.
- The individual was married at least 95 years ago.
- The individual's spouse was born or christened at least 120 years ago.
- One of the individual's children was born at least 95 years ago.
- The individual's parents were married at least 110 years ago.

- One of the individual's parents was born or christened at least 200 years ago.
- One of the individual's siblings was born or christened at least 130 years ago.

**Tip:** If the other individual also uses Personal Ancestral File 5.0, you can give him or her a backup copy of the .paf file. Be sure, however, that the other individual really needs your entire .paf file and that you really want to share everything in the .paf file, including information about living individuals and confidential information.

### Steps

1. From the **File** menu, select **Export**.
2. Select an Export To option:
  - If the person who will receive this GEDCOM file uses Personal Ancestral File, click the version that he or she uses. The program will automatically create the best type of GEDCOM file for that program.
  - If the person who will receive this GEDCOM file uses a program that accepts GEDCOM 4.0, click **PAF 2.1-2.31**.
  - If the person who will receive this GEDCOM file uses a program that accepts GEDCOM 5.5, click **Other GEDCOM 5.5**. Then select the character set. Select ANSEL unless you know that the other person uses a program that requires ANSI or unless you have nonroman characters (such as Japanese, Chinese, Korean, Arabic, Hebrew, or Cyrillic) in the .paf file. See "Programs that accept GEDCOM 5.5" (p. 115).
3. Click the Include options that you want.
4. To select all of the individuals in the .paf file, click **All**. Or to select some of the individuals, click **Partial** and then **Select**. Create a focus list that contains the names that you want to include in the GEDCOM file. See "How to create a focus list" (p. 100).
5. Click **Export**.
6. Select the drive and folder where you want to save your GEDCOM file.
7. Type a name for the file, and click **Export**.
8. When the export process is complete, a screen will appear, telling you how many names were submitted. Click **OK**.

### Submitting information to Ancestral File and Pedigree Resource File

Ancestral File is a collection of family groups and pedigrees submitted by individuals. If two different people submit the same name, the information is merged together. Ancestral File is available on FamilySearch Internet ([www.familysearch.org](http://www.familysearch.org)) and on compact disc at most Family History Centers worldwide.

Pedigree Resource File is also a collection of family groups and pedigrees submitted by individuals. However, this information is not combined and appears as it was originally submitted. For Pedigree Resource File, an index is available on FamilySearch Internet with full information on compact discs that you can purchase.

You can contribute your information to both Ancestral File and Pedigree Resource File.

For Ancestral File, mail the file on a disk to:

Family and Church History Department  
Ancestral File Submissions  
50 East North Temple Street  
Salt Lake City, UT 84150-3400  
USA

For Pedigree Resource File, submit it on the web through FamilySearch Internet.

### **Conditions for submitting to Ancestral File and the Pedigree Resource File**

To submit your genealogy to The Church of Jesus Christ of Latter-day Saints, you must agree to these conditions:

- You have received permission from all living persons named in your submission to submit their information.
- You give us permission to publish your name and address as the contributor of the information you submitted. This helps others to coordinate research with you.
- You give us permission to use, copy, modify, and distribute any of the information included in your submission without compensation and in any form we feel appropriate. You also give us permission to use the information from your submission to create new files.
- You affirm that you have the right to give us permission to use the information in your submission, as described in these conditions. You accept legal responsibility for any permitted use made of the information you provide.
- You agree that we are not responsible for any alteration, loss, damage, or corruption to your submission.
- You agree that once you submit your genealogy to us, it becomes our property and cannot be retracted or returned. However, this does not limit your right to publish, sell, or give the information to others.

### **Copyright for Ancestral File and Pedigree Resource File**

To protect Ancestral File and Pedigree Resource File contributions from misuse, the files are copyrighted by Intellectual Reserve, Inc.

Ancestral File and Pedigree Resource File are available on CD-ROM, on the Internet, and may also be available for use at Family History Centers near you at no charge. Ancestral File and an index of the current Pedigree Resource File is available on CD-ROM and on the Internet. Submitted GEDCOM files may also be included in other FamilySearch products, such as Ancestral File, and even made available on the Internet.

As part of the file, information you contribute may be available to the public in the Family History Library in Salt Lake City, Utah; in its associated Family History Centers worldwide; and in other Church facilities. In addition, copies of the file will be available for sale. The indexes may eventually be available on the Internet.

If you do not want to give permission to have your information published, or if you are not authorized to give permission, please do not contribute to Pedigree Resource File or Ancestral File.

Including your information in Ancestral File and Pedigree Resource File does not limit your right to publish the information yourself or to give it to others.

## Correcting information in Ancestral File and Pedigree Resource File

### *Ancestral File*

To correct information in Ancestral File, use one of two methods:

- Use the Ancestral File Edit feature on the compact disc version of the program.
- Submit the corrections on family group records or pedigree charts printed from Ancestral File.

You cannot use Personal Ancestral File 4.0 or 5.0 to submit corrections.

For more information, see the document *Correcting Information in Ancestral File* (34030). You can obtain this document at the Family History Library or at a Family History Center.

### *Pedigree Resource File*

Currently, you cannot submit corrections in the Pedigree Resource File. Instead, you can send in a new submission.

## How to submit information to Ancestral File and Pedigree Resource File

When you submit information to Ancestral File or Pedigree Resource File, please follow these steps:

- First, obtain permission from all living persons mentioned in your genealogy to submit their information to FamilySearch Internet. Remember, notes and sources attached to an entry for a deceased person may include information about a living person. You must remove any information about living persons if you do not have their permission to submit it.
- Second, review your notes and sources to make sure they do not contain any offensive or inappropriate statements about another person. Remove any such information.
- Third, follow the steps below to save your genealogy in a GEDCOM file format.
- Fourth, send the GEDCOM file that you have created to one or both of the following places: (1) To submit information to Pedigree Resource File, go to [www.familysearch.org](http://www.familysearch.org). Read the materials, and follow the instructions there. (2) To submit information to Ancestral File, save the information to a floppy diskette. Mail it to:

Ancestral File Submissions  
Family and Church History Department  
50 E. North Temple Street  
Salt Lake City, UT 84150-3400  
USA

### *Steps*

1. From the **File** menu, select **Export**.
2. Mark **Ancestral File or Pedigree Resource File**.
3. Mark the Include options that you want.
4. To select all of the individuals in the .paf file, click **All**. Or to select some of the individuals, click **Partial** and select. Create a focus list that contains the names you want to submit. See “How to create a focus list” (p. 100).

5. Click **Export**.
6. Read the explanations of Ancestral File and Pedigree Resource File, and click **Continue**.
7. Read the conditions for submitting information to it. If you agree, click **Agree**. If you do not agree, click **Cancel**.
8. Select the drive and folder where you want to save your submission.
9. Type a name for the file, and click **Export**.
10. When the export process is complete, a screen will appear, telling you how many names were exported. Click **OK**.
11. Read the Pedigree Resource File Submission Instructions screen, and click **OK**.



---

# Submitting names for temple work

When you have gathered and recorded information about your ancestors, Personal Ancestral File can help you submit their names for temple work.

## *If the Windows® version of FamilySearch™ TempleReady is available*

The Windows version of FamilySearch TempleReady is available in many Family History Centers and Church meetinghouses worldwide. If it is available in your area, you must use it to prepare names for temple work. You can use either of these methods:

- Take the .paf file directly to the TempleReady computer. TempleReady can select individuals directly from the .paf file and prepare a submission disk for the temple. It can also compare the individuals in the .paf file against the Ordinance Index. If it finds completed ordinances, it can copy the dates and temple codes directly into the .paf file. If the .paf file fits onto a floppy disk, copy it to a floppy disk and take it to the TempleReady computer. If the .paf file does not fit on a floppy disk and if the TempleReady computer also has Personal Ancestral File 5.0, make a backup copy of the .paf file. Use Personal Ancestral File 5.0 to restore it onto the TempleReady computer. You can then use the .paf file in TempleReady.
- If you cannot or do not want to use the above option, use the Export to TempleReady feature in Personal Ancestral File to select the individuals that you want to submit and to create a GEDCOM file that you can then use in TempleReady for Windows.

TempleReady will prepare a submission disk, which you then take to the temple. The temple staff will print family name cards and give them to you. As ordinances are performed, add the dates to the .paf file.

**Important:** You must use TempleReady for Windows if you submit individuals who have nonroman characters in their records. Nonroman characters include characters from languages such as Japanese, Chinese, and Korean.

## *If the DOS version of FamilySearch TempleReady is available*

If the DOS version of TempleReady is available, use the Export to TempleReady feature in Personal Ancestral File to select the individuals that you want to submit and create a GEDCOM file that you can then use in TempleReady for Windows.

TempleReady will prepare a submission disk, which you then take to the temple. The temple staff will print family name cards and give them to you. As ordinances are performed, add the dates to the .paf file.

***If the Windows version of FamilySearch TempleReady is not available***

If the Windows version of TempleReady is not available in your area, follow this process:

- Select the names in Personal Ancestral File, and have it determine whether you have enough information for the ordinances to be performed.
- Send a copy of this file to the temple, where workers prepare cards for you.
- As ordinances are performed, add the dates to the .paf file.

**Guidelines for submitting names for temple work**

When you submit names for temple work, please consider the following guidelines:

- Our preeminent obligation is for our own ancestors. We should not submit the names of individuals who are not related to us, including names we may obtain from personal extraction projects.
- An individual whose name is submitted must have been deceased for at least one full year.
- If the individual was born in the past 95 years, permission should be obtained from the closest living relative before the name is submitted.
- No ordinances are necessary for children who are stillborn. However, if there is any possibility that a child lived after birth, he or she should be sealed to the parents unless the child was born in the covenant (meaning that the child's parents were sealed before he or she was born).
- Children who died before age eight and were not born in the covenant need only to be sealed to their parents. They do not need any other ordinances.
- Clearance must be obtained from the First Presidency before temple ordinances may be performed for deceased persons who, at the time of their death, were excommunicated or had their names removed from Church records.

**Information required for temple ordinances**

This list shows the *minimum information* needed to perform ordinances. Add more information if you know it. Some of this information can be estimated. The information should be as accurate as reasonably possible.

***Baptism and Endowment***

- Name
- Sex
- Event date, such as a birth date (at least a year is required)
- Event place for the same event as the place, such as a birthplace (at least a country is required)

***Sealing to Parents***

- Information under "Baptism and Endowment" above
- First or last name of the father

***Sealing to Spouse***

- Name of the husband
- Marriage date
- Marriage place

## Estimating information for temple ordinances

When you prepare names for temple ordinances, please provide the most accurate information possible. However, you cannot find exact dates and places, you can calculate or estimate them.

### *Calculating dates*

You may calculate a date, such as a birth date, when you know the date of an event and the individual's age at the time of the event. For example, if the 1860 U.S. census lists an individual as two years old, you may calculate the birth date to be 1858.

If you calculate a date, type Cal (for calculated).

Cal 1798

**Tip:** When you calculate dates, you could add an event for that information. For example, if you obtained information from a census, you could add the Census event to the individual record and a source for that event. Explain the calculation in the Comments field for that source.

### *Approximating dates*

You may estimate dates for events based on other information.

You may use family knowledge or tradition. For example, if a family tradition says that an ancestor was 16 when she married in 1876, you can estimate that she was born "about 1860."

You may use standard genealogical approximations. For example, from a marriage date you can estimate birth dates. You can estimate that a man was married at age 25 and a woman at age 21. You can also estimate that a first child was born one year after the marriage and that subsequent children were born every two years after that.

**Tip:** You need at least the approximate year of an event for ordinances to be performed. Below are some examples of how you may estimate a date.

When you type an approximated date onto an individual or marriage record, you can type one of the following words or abbreviations to indicate that the date is not exact:

About or Abt

Before or Bef

After or Aft

Estimated or Est

### *Assumed places*

You may assume places of residence based on a place where one member of a family was born, died, or lived at some time, or where the husband and wife were married. This place can be used as a probable place of residence for other members of the family.

**Tip:** You could make note of the assumption in your notes.

## How to create a GEDCOM file for TempleReady for Windows

You should generally only submit enough ordinances that you, with help from your family or others, can finish within a reasonable amount of time. To limit the number of ordinances, select the specific individuals, couples, and families whose ordinances you want to perform.

Use this process only if you cannot or do not want to take the .paf file directly to a TempleReady computer.

**Important:** Use this process only if you plan to use TempleReady for Windows. This process creates a GEDCOM file that TempleReady for DOS will not be able to read.

### *Steps*

1. From the **File** menu, select **Export for TempleReady**.
2. Read the Temple Names Submission screen, and click **Continue**.
3. Click an individual in the list.
4. Select the relationship filter that you want to use, and click **Select**. See “Choosing a Relationship Filter” (p. 103).
5. Repeat steps 3 and 4 until you have selected all of the individuals that you want to submit.

**Tip:** Ordinance information appears on the right side of the screen. If an individual does not have an ordinance date, the program lists whether the name would qualify and the reasons why it would not. If a name does not qualify and you have the missing information, click **Edit**.

6. Click **OK**.
7. Select the options you want on the Temple Names Submission Options screen.
8. Select the drive and folder where you want to save your submission.
9. Type a name for the file, and click **Export**.
10. When the export process is complete, a screen will appear, telling you how many names were exported. Click **OK**.
11. Read the TempleReady Instructions screen, and click **OK**.

**Tip:** If you chose to have a submission report prepared, the program displays it in a text editor, where you can read, print, or edit it. To close the report, click the **File** menu, and select **Exit**.

### **How to create a GEDCOM file for TempleReady for DOS**

You should generally only submit enough ordinances that you, with help from your family or others, can finish within a reasonable amount of time. To limit the number of ordinances, select the specific individuals, couples, and families whose ordinances you want to perform.

**Important:** Use this process only if you need to use TempleReady for DOS. Nonroman characters--such as Cyrillic letters or characters from Japanese, Chinese, and Korean--will not be included in the GEDCOM file.

### *Steps*

1. From the **File** menu, select **Export**.
2. Click **TempleReady for DOS**.
3. Click **Partial**.
4. Click **Select**.
5. Click an individual in the list.
6. Select the relationship filter that you want to use, and click **Select**. See “Choosing a Relationship Filter” (p. 103).
7. Repeat steps 5 and 6 until you have selected all of the individuals that you want to submit.

**Tip:** Ordinance information appears on the right side of the screen. If an individual does not have an ordinance date, the program lists whether the name

would qualify and the reasons why it would not. If a name does not qualify and you have the missing information, click **Edit**.

8. Click **OK**.
9. Click **Export**.
10. A message will appear to tell you that this type of export uses the ANSEL character set. To continue, click **Yes**.
11. Read the Temple Names Submission screen, and click **Continue**.
12. Select the options you want on the Temple Names Submission Options screen, and click **OK**.
13. Select the drive and folder where you want to save your submission.
14. Type a name for the file, and click **Export**.
15. When the export process is complete, a screen will appear, telling you how many names were exported. Click **OK**.
16. Read the TempleReady Instructions screen, and click **OK**.  
**Tip:** If you chose to have a submission report prepared, the program displays it in a text editor, where you can read, print, or edit it. To close the report, click the **File** menu, and select **Exit**

### **How to add TempleReady updates (.oup files)**

The easiest way to add completed ordinance dates to a .paf file is to copy the .paf file or a backup file to a floppy disk and use the Update My Records feature in TempleReady for Windows.

If a .paf file is too large to fit on a floppy disk or if the local family history center will not allow you to restore a backup of your large file onto their hard drive, then you can create a GEDCOM file for use in the Update My Records feature. TempleReady for Windows creates an .oup file with information about completed ordinances. You import the .oup file into your .paf file, and the ordinance information is added to the .paf file

1. From the **File** menu, select **Add TempleReady Update**.
2. Select the drive and folder where the file is located.
3. Select the file.
4. Click **Import**.
5. Wait while the ordinance dates are added to the .paf file.
6. When the process is finished, click **OK**.

---

# Printing reports

You can print many different reports, charts, and lists, including the following:

- Pedigree charts
- Family group records
- Ancestry and wall charts
- Descendancy charts
- Books, including books organized by descendants (modified register) and books organized by ancestors (Ahnentafel)
- Individual summaries
- Scrapbooks
- Lists
- Calendars
- Custom reports

**Tip:** You can print a TempleReady Submission Report when you submit names for temple work. You cannot print it from the Reports and Charts screen.

## Printing LDS ordinance information

You can print Latter-day Saint ordinance information on the following reports:

- Pedigree charts
- Family group records
- Individual summaries
- Ancestry and descendancy wall charts
- **Tip:** To print LDS ordinance information on ancestry and descendancy wall charts, click the Select Items button. Then mark the LDS Ordinance Codes option.
- Books.
- LDS incomplete individual ordinances and LDS incomplete marriage sealings
- LDS family ordinance summary
- Custom reports

**Tip:** To print Latter-day Saint ordinance information, you must set your preferences to include this information. In Preferences mark both the Use LDS Data option and the Show LDS Data on Reports option.

## How to preview reports

When you click the Preview button, you can see what your report will look like before you print it. You can zoom in to a specific portion of the document, change the display from one to two pages at a time, scroll through several pages, and even print the report directly from this screen.

**Tip:** You may find that photos take a long time to display. If you do not need to view the photos when you preview reports, change your print preferences to view place

holders instead. The photo prints on the report, but a gray box appears when you preview the report.

See “How to set report preferences” (p. 136).

### **Steps**

1. Choose the report and the report options that you want to print.
2. Click **Preview**.
3. To scroll through the pages, click **Next Page** or **Prev Page**.
4. To view the pages more closely, click **Zoom In** or **Zoom Out**.
5. To view one or two pages at a time, click **One Page** or **Two Pages**.  
**Tip:** The Two Pages button is available only when a report has more than 1 page.
6. If you want to print the report, click **Print**. Or to return to the Reports and Charts screen, click **Close**.

## **How to save reports as files**

You can save a report as a file.

You can save family reunion contacts as text (.txt) files. To print list of family reunion contacts directly from the program, you must create and print a custom report that contains the contact information.

You can save all other reports as Rich Text Format (.rtf) files.

**Tip:** You can also save custom reports as comma-delimited text files. You can import these files into word processors, databases, and spreadsheets. For further instructions, check the documentation or help files that came with your spreadsheet, database, or word processing program.

You can use both text and Rich Text Format files in word processors. You can also e-mail the files to other people.

### **Steps**

1. Select the report and report options that you want.
2. Click **Print to file**.  
**Tip:** Once you mark the Print to File option, all reports will be saved to a file until you unmark the box.
3. Click **Print**.
4. Specify a folder and a file name for the report.
5. Click **Save**. The report opens in your default word processor. If you want to open the file in a different program, close your word processor. Then open the file in the program that you want to use.

## **How to print pedigree charts**

A pedigree chart prints the individuals in the .paf file in much the same way as they appear on the Pedigree View screen. On a single page, you can print between four and six generations, including names, birth or christening dates and places, death or burial dates and places, marriage information (when applicable), and Latter-day Saint ordinance abbreviations (when applicable).

- *B* means baptism.
- *E* means endowment.
- *S* means sealing to spouse.

- *P* means sealing to parents.
- *C* means that all of the children's ordinances have been done. The "C" appears under the following conditions:
  - The parents have been baptized, endowed, and sealed as spouses.
  - If one of the parents is linked to other spouses, the other spouses have also been baptized, endowed, and sealed as spouses.
  - Each child has been baptized, endowed, and sealed to his or her parents.
  - All of the children have been sealed to all of their spouses.
- A dash (-) indicates that an ordinance does not need to be done.
- Lowercase letters, (*b*, *e*, etc.) indicate that the ordinance date field contains the term "Cleared," "Submitted," or "Sub," plus a date. It means that the ordinance is not yet done.

You can also print photos, choose fonts, or change preferences.

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Pedigree** tab.
3. Look at the starting individual. If you want to select a different individual:
  - a. Click **Search**.
  - b. If you know the RIN or MRIN, type it, and then click **OK**. Or if you do not know the RIN or MRIN, click **Individual List** or **Descendancy List**, and find the individual.
4. Select the options that you want.

**Tip:** To print a series of charts for the same line of ancestors, select the Cascading option. You can then select the starting number for the charts and the number of generations to print.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

## **How to print family group records**

- A family group record (FGR) lists information about parents and their children. It contains all or some of the following information:
  - Birth date (and place)
  - Marriage date (and place)
  - Death date (and place)
  - Custom events that you have added to individual and marriage records
  - Notes
  - Sources
  - Photos
  - Latter-day Saint ordinance information

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Family Group** tab.



3. Look at the starting individual. If you want to select a different individual, click **Search**. Or if you want to print family group records for a list of MRINs, follow these steps:
  - a. Click **Use List**.
  - b. Type the MRIN of each family you want to print. Type a comma between single MRINs. For example, type 123, 176, 265 to print those 3 records. Type a hyphen between a range of MRINs. For example, type 123-175 to print records 123 through 175.
  - c. When you are finished, click **OK**.  
**Tip:** If you do not know the MRINs, click the Browse button. You can select the couples that you want from the Marriage List.
4. Select the options that you want.  
**Tip:** You can print a family group record for a single family or for several families. If you want to print family group records for all families who are in an ancestral line, mark the Cascading option, and select the number of generations.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

## How to print ancestry charts

Ancestry charts are similar to pedigree charts. In general, they show more generations of an individual's direct-line ancestors with less information about each individual. You can print two types of ancestry charts.

- **Standard chart.** A standard ancestry chart is a pedigree-style chart that contains only names and limited information about each individual. Several generations fit on one page.
- **Wall chart.** Wall charts are charts that can be assembled into one large chart and displayed on a wall. For example, if you wanted to print 15 generations with 3 generations on each page, the report would contain 20 pages. You would then manually assemble the pages into a complete chart.

**Tip:** If you leave a bit of printable area outside of your margins, the program will print crop marks and sheet numbers to help you assemble the pages. Sheets are identified first by column and then by row. For example, (3, 2) means the third column and the second row of the chart.

### Steps

1. From the **File** menu, select **Print Reports**.
2. Click the **Ancestry** tab.
3. Look at the starting individual. If you want to select a different individual:
  - a. Click **Search**.
  - b. If you know the RIN or MRIN, type it, and then click **OK**. Or if you do not know the RIN or MRIN, click **Individual List** or **Descendancy List**, and find the individual.
4. Select the options that you want.  
**Tip:** After you select the Standard Chart option or the Wall Chart option, different options appear on the screen.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

## How to print descendancy charts

A descendancy chart lists an individual and his or her spouses and descendants (children and children's children). You can print two types of descendancy charts.

- **Standard chart.** A standard descendancy chart shows the individual's spouses and descendants in a single column down the page. Each generation is indented slightly.
- **Wall chart.** Wall charts are just that: Charts that can be assembled into one large chart and displayed on a wall. A descendancy wall chart shows the individual's spouses and descendants in a "tree" format. You can choose to print each individual's information in a box. After the report is printed, you can assemble the pages into one large chart.

### Steps

1. From the **File** menu, select **Print Reports**.
2. Click the **Descendants** tab.
3. Look at the starting individual. If you want to select a different individual:
  - a. Click **Search**.
  - b. If you know the RIN or MRIN, type it, and then click **OK**. Or if you do not know the RIN or MRIN, click **Individual List** or **Descendancy List**, and find the individual.
4. Select the options that you want.  
**Tip:** After you select the Standard Chart option or the Wall Chart option, different options appear on the screen.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

## How to print books

Books contain information about several generations of your family. The birth, christening, marriage, death, and burial information is printed in narrative form. You can organize books in the Ahnentafel and modified register formats.

- **Ahnentafel.** An ahnentafel book starts with a specified individual and lists his or her ancestors. Each individual is numbered according to the following pattern:
  - The first individual is number 1.
  - The father's number is calculated by multiplying the child's number by 2.
  - The mother's number is calculated by multiplying the child's number by 2 and adding 1.

For example, the father of individual number 16 (who is the great-great-grandfather of individual 1) is 32, and the mother is 33.

An ahnentafel book contains up to 32 generations because the numbering system becomes impractical. The number of an individual in the 32nd generation is in the billions.

- **Modified register.** A modified register book lists an individual's descendants. The starting individual is number 1. Beginning with the spouse of number 1, individuals are numbered sequentially as they are encountered. The modified register prints up to 199 generations, which are more than is possible to have in recorded history.

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Books** tab.
3. Look at the starting individual. If you want to select a different individual:
  - a. Click **Search**.
  - b. If you know the RIN or MRIN, type it, and then click **OK**. Or if you do not know the RIN or MRIN, click **Individual List** or **Descendancy List**, and find the individual.
4. Select the options that you want.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

### **How to print individual summaries**

An individual summary shows information about an individual. You can print 1 summary or several summaries at a time.

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Individual Summary** tab.
3. Look at the starting individual. If you want to select a different individual, click **Search**. Or if you want to print individual summaries for many individuals, follow these steps:
  - a. If it is not selected, click **Use List**. Or if Use List has already been selected, click **Select**.
  - b. Use the Advanced Focus/Filter feature to select the individuals that you want.
  - c. Click **OK**.
4. Select the options that you want.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

### **How to print scrapbook pages**

Scrapbook pages show all or some of the photos and scanned documents you have collected for an individual or group of individuals.

**Tip:** To print scrapbook pages for several individuals at a time, you will use the Advanced Focus/Filter feature. To access this feature, mark the Use List option, and click the Select button.

You determine the following settings for scrapbooks:

- Whether or not to include captions, descriptions, file names, RINs, and boxes.
- The number of photos per page.
- The approximate size of photos.

**Tip:** If you want to exclude a photo from the scrapbook, specify that before you print the report. Find the individual whose scrapbook you want to print, and access The Multimedia Collection screen. Select the photo that you want to exclude, and click the Edit Photo button. Unmark the Include Photo in Scrapbook option.

### Steps

1. From the **File** menu, select **Print Reports**.
2. Click the **Scrapbook** tab.
3. Look at the starting individual. If you want to select a different individual, click **Search**. Or if you want to print individual summaries for many individuals:
  - a. If it is not already marked, click **Use List**.
  - b. Click **Select**.
  - c. Use the Advanced Focus/Filter feature to select the individuals that you want.
  - d. Click **OK**.
4. Select the options that you want.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

### How to print lists

You can print many types of lists. To print a list, click it, and click the Print button.

**Tip:** If you select a list with options, the Options button becomes active. Click it to specify how the list should be printed.

- **Unlinked individuals.** A complete list of individuals in the .paf file who are not linked to a family or spouse.
- **Duplicate individuals.** A complete list of individual records which appear to be duplicated.
- **Individuals sorted by RIN.** A list of all or some of the individuals in the .paf file, sorted numerically by RIN.
- **Individuals sorted alphabetically.** A list of all or some of the individuals in the .paf file, sorted alphabetically by name.
- **Marriages.** A list of marriages. You can choose to sort the list by MRIN, husband's name, or wife's maiden name. You can also limit the report to a range of MRINs or to a range of names.
- **Possible problems.** A list of any possible data discrepancies. For example, it will show if an individual's death date is prior to the birth date.
- **End-of-line-individuals.** A list of individuals who are not linked to parents. You can print either all of the individuals without parents or only individuals in a specific line of ancestors.
- **Family reunion contacts.** A list of the contact information for individuals in your file. You cannot print this list. However, you can export it to a text file and print it in a word processor. From this list you can prepare a list of individuals to contact for specific mailing purposes, such as family reunion announcements. Before you export the list, you should be aware of some special considerations.

The list includes only the contact information for individuals who have it.

The list includes only living descendants.

If you typed "No Contact" or "NC" instead of the individual's name on the Contact Information screen, that contact information will not be included on the list.

If you typed a name for the individual or his or her spouse, then the list will contain that name instead of the name in the individual record. If there is no

contact name, then the married name is used instead of the surname. For women, their husband's surname is used.

If you have typed addresses for children still living at home, multiple entries will print for the same address.

You cannot print the list of family reunion contacts directly from the program. Instead, the report is saved as a file, which you can use in a word processor.

- **Place sorted alphabetically.** A list of your records sorted alphabetically by event places and the temple for Latter-day Saint events.
- **Individuals with notes.** A list of individuals that have notes. The list also includes RINs.
- **Sources.** A list of the sources in the .paf file.
- **Citations referencing a source.** A list that shows the citation for each place where a particular source is used.
- **LDS incomplete individual ordinances.** An alphabetic list of every individual that is missing at least one Latter-day Saint ordinance. All available ordinance information is printed.
- **LDS incomplete marriage sealings.** An alphabetic list of marriages that do not have a Latter-day Saint sealing date.
- **LDS family ordinance summary.** A report showing an individual and his or her parents, grandparents, and their Latter-day Saint ordinance information.

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Lists** tab.
3. Click the list that you want to print.
4. To change the options used for this list:
  - a. Click **Options**.
  - b. Select the options that you want.
  - c. Click **OK**.
5. If you want to see the report before printing it, click **Preview**.
6. To print the report, click **Print**.

## **How to print calendars**

Calendars are a great way to remind you of upcoming birthdays and anniversaries. You can print a calendar for any month between the years 1980 and 2100. If you want a year's worth of calendars, you must print each month one at a time.

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Calendar** tab.
3. Select the options that you want.
4. If you want to see the report before printing it, click **Preview**.
5. To print the report, click **Print**.

## Setting general print options

Several options are available for all or most reports. These include:

- Setting up the page (margins, page orientation, and so forth).
- Selecting a different printer.
- Selecting fonts for reports.
- Changing the titles of reports.
- Printing photos on reports.
- Setting report preferences.

### How to set up the page

Click the Page Setup button to select print options such as:

- The printer.
- Paper size and source.
- Portrait or landscape orientation.
- Margins.
- Printer.

Depending on the report and your printer driver, you can use a wide variety of page layout and margin options.

**Tip:** If you print a wall chart, you could experiment with very large paper sizes. Windows now supports some plotters, and you may find a printing service that will print the report on a large piece of paper. That way, you will not have to assemble many small pieces of paper to create your wall chart.

### Steps

1. From the Reports and Charts screen, click **Page Setup**.
2. From the Paper box, choose the size of the paper and the source where the report will print.
3. From the Orientation box, choose **Portrait** (vertical) or **Landscape** (horizontal) mode.
4. Choose any combination of **left**, **right**, **top**, and **bottom** margins.
5. Before you print the report, click **Preview** to check your margin and orientation choices.

### How to select a different printer

If your computer is set up to print on more than one printer, you can choose which printer you will use.

### Steps

1. From the Reports and Charts screen, click **Page Setup**.
2. Click **Printer**.
3. In the Name drop-down box, select the printer that you want to use.
4. If you want to change the printer properties, follow these steps:
  - a. Click **Properties**.
  - b. Make the desired changes.

- c. Click **OK**.
5. To return to the Page Setup screen, click **OK**.

### How to select fonts for reports

You can select the fonts used for all reports except lists.

#### *Steps*

1. From the Reports and Charts screen, click **Fonts**.
2. From the drop-down box, select the information item that you want to change the font for.
3. Click **Change**.
4. Select the font you want. To return to the fonts that were selected when you installed the program, click **Set to Defaults**.
5. Repeat steps 3 to 5 for each font that you want to change.
6. Click **OK**.

### How to change the title

You can change the title of web pages, ancestry charts, descendancy charts, books, individual summaries, scrapbook pages, and calendars.

**Tip:** To change the title of a custom report, you can type it on the Custom Reports tab of the Reports and Charts screen.

#### *Steps*

1. From the Reports and Charts screen, click **Title**. Or from the second Create Web Page screen, click **Edit**.
2. To include the selected individual's name in the title, click **Include Name**.
3. To type text that will precede the name on the title, click **Prefix**.
4. To type text that will appear after the name, click **Suffix**.
5. The Title box will reflect the changes that you make to the title. When you are satisfied with your changes, click **OK**.

### How to print photos on reports

You can print photos on pedigree charts, family group records, ancestry wall charts, books, individual summaries, and scrapbooks.

On the screen for each of these reports is an option to include photos. If you click that option, the Photos button becomes available.

Click the Photos button to specify (in most cases) photo size, placement, and whether space should be reserved for a photo if an individual does not have a default photo.

#### *Steps*

1. From the Reports and Charts screen, click **Photos**.
2. From the Size box, choose photo height and width to print.  
**Tip:** The program will try to print the photos as close to the height and width as possible. Paper size, orientation, and margins may affect how large the photos can be.

3. From the Photo Placement box, choose where the photo will print in relation to text and other data. You can choose from **Above**, **Below**, **Left**, **Right**, or in the **Center** of the text.
4. If you want to reserve space for photos that are not currently in the .paf file, click **Reserve Space for Missing Photos**.

### How to set report preferences

You can specify the preferences that affect reports on either the Reports and Charts screen or on the Preferences screen.

**Tip:** On the Preferences screen, most of the preferences that affect reports are on the General tab. The Use Photo Placeholders option is on the Multimedia tab.

If you change preferences in one place, it changes the setting on both screens.

### Steps

1. From the Reports and Charts screen, click **Preferences**.
2. If you want to print Latter-day Saint ordinance information on your reports, click **Show LDS Data on Reports**.
3. To always capitalize surnames on your printouts, click **Capitalize Surnames**.
4. To enhance how your reports appear, click **Shade Reports**.
5. To choose a shade color, click **Shade Color**.
6. From the **Print Preview** box, click **Use Photo Placeholders**.  
**Tip:** When you mark the Use Photo Placeholders option, the program displays gray boxes instead of photos when you preview a report. This allows you to check the placement of the photos without waiting for them to load.
7. If you do not want to see the shading when you preview a report, click **Hide Shading**. The shading will still print.
8. Click **OK**.



---

# Creating and printing custom reports

If the program does not have a report that contains the information you want to see, you can select the information and individuals that you want to print on a report.

You can save custom reports for later use in any of the .paf files. You can also modify and delete the custom reports that you have saved.



**Tip:** You can also save custom reports as Rich Text Format (RTF) files for use in a word processor or save them as a comma-delimited text file. You can import this type of file into a spreadsheet, database, .paf file, or word processor.

## How to create and print a custom report

To print a custom report, you will need to perform 3 main tasks:

- Use the Advanced Focus/Filter feature to select the individuals that you want to appear on the report.
- Choose the fields and column options that you want.
- Choose how the report should be sorted.

### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Custom** tab.
3. Type a title for the report.
4. To select the individuals you want on the report, click **Select**.
5. Click **Fields**.
6. From the Possible Fields text box, click the field that you want to print.  
**Tip:** If you select **Notes**, you can print one line of notes. A screen appears that lets you choose whether you want all notes or only notes that begin with a specific tag. The list of tags you see in the drop-down box is the same list that appears on the Notes Selector screen.
  - a. To add the selected data to the Selected Columns box, click **>**.
  - b. To change the heading and width of the column where the field will print, click the field, and click **Column Options**.
  - c. To change the order in which fields appear on the report, click a field name, and click  or .
  - d. When you finish selecting fields, click **OK**.
7. To choose how the individual on the report will be sorted, follow these steps:
  - a. Click **Sort Order**.
  - b. From the Possible Fields box, click a field that you want to sort on.  
**Tip:** You can sort a custom report on a field that is not displayed on the report.
  - c. To add the selected field to the Order List box, click **>**.
  - d. Click each field in the Order List box.

- e. To sort the field from the smallest value to the largest (or alphabetically from A to Z), click **Ascending**. Or to sort the field from the largest value to the smallest (or alphabetically from Z to A), click **Descending**.
  - f. Repeat steps 2 to 5 until you have selected all of the fields that you want to sort on
  - g. When you finish selecting fields to sort on, click **OK**.
8. If you want to see the report before printing it, click **Preview**.
  9. To print the report, click **Print**

### **Saving, reusing, and deleting custom reports**

After you have done all of the work to create a custom report, you will probably want to use it again.

You can save, reuse, and delete custom reports.

**Tip:** When you use the Advanced Focus/Filter feature to select a group of individuals, you can save and reuse the list. If you think you may need to reprint the exact same report with the same fields and individuals, save both the custom report and the list of individuals.

#### **How to save a custom report**

After you create a custom report, you can save it for later use.

##### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Custom** tab.
3. Create your custom report.
4. Click **Save**.
5. Type a title for the custom report.  
**Tip:** Type a title that describes the contents of the report. This will help you later when you need to select which custom report you want to use.
6. Click **Save**.

#### **How to reuse a custom report**

If you saved a custom report, you can reuse it.

##### *Steps*

1. From the **File** menu, select **Print Reports**.
2. Click the **Custom** tab.
3. Click **Open**.
4. Click the report that you want to open or print.
5. Click **Open**.

### **How to modify a custom report**

Modifying a custom report with a different name is a good way to create a variation of a custom report that you created earlier.

#### ***Steps***

1. From the **File** menu, select **Print Reports**.
2. Click the **Custom** tab.
3. Click **Open**.
4. Click the report that you want to open or print.
5. Click **Open**.
6. Make the changes that you need.
7. Click **Save As**.
8. To keep the existing title, click **Overwrite**. Or to rename the report, type a new title, and click **Save**.

### **How to delete a custom report**

When you no longer need a custom report, you can delete it.

#### ***Steps***

1. From the **File** menu, select **Print Reports**.
2. Click the **Custom** tab.
3. Click **Open**.
4. Click the report that you want to delete.
5. Click **Delete**.

---

# Creating web pages

One way to share your information with others is to put it on the Internet.

Personal Ancestral File can create the web pages for you. All you need to do is get an Internet service provider (ISP) to post it for you. If you need to update your web pages, you should create a new set of pages and send them to your ISP, with instructions to replace your existing information with the new information.

When you post a web page, other individuals can find your information and communicate back to you.

**Tip:** You may prefer to include only part of your information on your web pages. Then individuals who access your web page on the Internet must contact you to obtain the rest. This helps you find other individuals who may be related to you and who may have information to share with you. If you put all of your information on your web site, individuals may simply download the information and not contact you.

## How to create web pages

When you create web pages, the program saves them on your hard disk in the folder specified on the Preferences screen, on the Folders tab. After you create your web pages, you must upload all files, folders, and files in subfolders to your Internet site. For more information, contact your Internet service provider (ISP).

Please respect the privacy of individuals who may be living, and do not post information about them without permission. Do not share information that may be used to embarrass or harm people who may still be living (such as home addresses and telephone numbers, social security numbers, and mothers' maiden names).

To help protect privacy of living individuals, the Hide Details for the Living option is automatically selected each time you create Web pages. Unless you deselect this option, the program checks each individual that you select. If he or she may still be alive, it includes only a limited amount of information. If you also mark the Include GEDCOM file option, the GEDCOM file will contain only deceased individuals.

If one of the following conditions is met, the program considers that the individual is deceased.

- The individual's Death Date or Burial Date field contains information.
- The individual was born or christened at least 110 years ago.
- The individual was married at least 95 years ago.
- The individual's spouse was born or christened at least 120 years ago.
- One of the individual's children was born at least 95 years ago.
- The individual's parents were married at least 110 years ago.
- One of the individual's parents was born or christened at least 200 years ago.
- One of the individual's siblings was born or christened at least 130 years ago.

### *Steps*

1. From the **Tools** menu, select **Create Web Page**.
2. Select the type of web page.
3. If you selected the Ancestors option or Descendants option, select the starting individual. Or if you selected the Selected Individuals option, use the Advanced Focus/Filter feature to select the individuals you want to include.
4. Select the options you want.
5. Click **Next**.
6. Type the information requested on the next screen.
7. When you are finished, click **Finish**.

### **How to change the title**

You can change the title of web pages, ancestry charts, descendancy charts, books, individual summaries, scrapbook pages, and calendars.

**Tip:** To change the title of a custom report, you can type it on the Custom Reports tab of the Reports and Charts screen.

### *Steps*

1. From the Reports and Charts screen, click **Title**. Or from the second Create Web Page screen, click **Edit**.
2. To include the selected individual's name in the title, click **Include Name**.
3. To type text that will precede the name on the title, click **Prefix**.
4. To type text that will appear after the name, click **Suffix**.
5. The Title box will reflect the changes that you make to the title. When you are satisfied with your changes, click **OK**.

---

# Merging duplicate records

Each individual, source, and repository in the .paf file should have one record. Duplicate records increase the size of a .paf file. Further, if you change an individual, source, or repository that has another record, the change does not get made to the duplicate.

To merge records, you can use one of these options:

- Have the program identify individual records that may be duplicates. You decide whether to merge them. You can also specify the criteria that is used to determine whether records may be duplicates.
- Manually select two records and merge them.
- Have the program merge duplicate sources and repositories.

## Case Study: Importing and merging records

You received a GEDCOM file and want to import it into your own .paf file. However, you want to evaluate the information before you add it to your own information.

1. Import the GEDCOM file into a new, empty .paf file, and evaluate it carefully. You may note the following:
  - The GEDCOM file has many records that are identical to your own. Many have Ancestral File numbers.
  - Many place-names are abbreviated.
  - Surnames are typed in all uppercase letters.
2. To spell out the abbreviated place-names, use the Global Search and Replace feature (on the Tools menu).
3. To correct the surnames, use the Change Names to Mixed Case feature (on the Tools menu).
4. Use the Export feature to create a new GEDCOM file that contains the corrections.
5. Make a backup copy of the .paf file. That way, if something goes wrong, you can restore it from your backup.
6. Import the GEDCOM file into the .paf file.
7. Use the Match/Merge feature several times, in this order:
  - From the **Tools** menu, select **Match/Merge**. Since you already have a current backup copy of your original .paf file, do not make a new backup copy.
  - On the Match/Merge Options screen, mark the **Ancestral File Numbers (AFNs)** option and the **Automatically Merge Exact Duplicates** option. Run the merge, and the program automatically merges identical records that have the same Ancestral File numbers.
  - Click **Options** again. Mark the **Names That Sound Alike (Soundex)** option. Run the merge. The program shows you records that may be duplicates. You decide whether to merge them.

8. To merge duplicate sources, use the Merge Duplicate Sources and Citations feature. See “How to merge sources and repositories” (p. 150).
9. If needed, add the new individuals to the families that are already in the .paf file.

### **Case Study: Using the Export, Import, and Match/Merge features to synchronize files**

Personal Ancestral File 5.0 assigns each record in the .paf file a unique record serial number. Like a record identification number (RIN), a unique record serial number identifies each individual in a .paf file. Unlike a RIN, a unique record serial number is unique worldwide. This means that each individual in each of the .paf files has a different number than all other individuals in all other .paf files that are made worldwide.

The number does not change if you export a GEDCOM file and send it to another person. Therefore, you can send a GEDCOM file to a relative, and he or she can import it into Personal Ancestral File, make changes to it, create another GEDCOM file, and send it back to you. You can then use the Match/Merge feature to identify the records that you originally created, identify what changes the other person made, decide which information to keep, and merge the records.

To do this, follow these steps:

1. Use the Export feature to create a GEDCOM file that contains the information that you would like to send to your relative. Mark the **PAF 5** option.
2. When your relative returns the GEDCOM file, import it into a new, empty .paf file and evaluate it carefully. Make any needed corrections.
3. Create a new GEDCOM file that contains the individuals that you want to import into the .paf file.
4. Make a backup copy of the .paf file. That way, if something goes wrong, you can restore it from your backup.
5. Import the new GEDCOM file into the .paf file.
6. From the **Tools** menu, select **Match/Merge**. Since you already have a current backup copy of your original .paf file, you do not make a new backup copy.
7. On the Match/Merge Options screen, mark the **Unique Record Serial Numbers** option and the **Automatically Merge Exact Duplicates** option. Run the merge, and the program automatically merges identical records that have the same record serial numbers.
8. Click **Options** again. Mark the **Names That Sound Alike (Soundex)** option. Run the merge. The program shows you records that may be duplicates. You decide whether to merge them.
9. To merge duplicate sources, use the Merge Duplicate Sources and Citations feature. See “How to merge sources and repositories” (p. 150).
10. If needed, add the new individuals to the families that are already in the .paf file.

## Merging individual records

If you find that you have more than one record for the same individual, you can combine the records (merge them) into one record.

Consider the following strategies as you decide which method to use:

### *Select records to merge*

If you know of two records for one individual, you can find the two records and merge them.

### *Have the program identify potential duplicates*

If you have many records to merge, have the program identify possible duplicates. It displays the records and allows you to decide whether they are duplicates.

You can select the criteria that the program uses to identify possible duplicates.

- **By name.** You can have the program look for exact names or names that sound alike.
- **By Ancestral File number (AFN).** You can have the program look for records that have the same Ancestral File number.
- **By unique serial number.** Each record in the .paf file is assigned a unique serial number. Like a record identification number (RIN), a unique record serial number identifies each individual in a .paf file. Unlike a RIN, a unique record serial number is unique worldwide. This means that each individual in each of the .paf files has a different number than all other individuals in all other .paf files that are made worldwide.

The number does not change if you export a GEDCOM file and send it to another person. Therefore, you can send a GEDCOM file to another individual, he or she can import it into Personal Ancestral File, make changes to it, create another GEDCOM file, and send it back to you. You can then use the Match/Merge feature to identify the records that you originally created, identify what changes the other person made, decide which information to keep, and merge the records.

You cannot see a unique serial number on the Individual screen, and you cannot edit it.

## Identifying duplicate individual records

To find out whether you have duplicate individual records, you can:

- Use the Match/Merge feature to have the program identify potential duplicates. You can then choose whether to merge the records or not.  
**Tip:** You can change the options that the program uses to identify potential duplicates.
- Print a list of duplicate individuals.
- Print an alphabetical list of individuals, and then manually check each record that may be a duplicate.

## Strategies for the Match/Merge feature

If a .paf file has many duplicate records, you may want to use the Match/Merge feature several times with different merge options.

Some merge options find more possible duplicates than others. To make the best use of your time, first use the options that merge records that are obviously duplicates.



Afterwards, use the options that find duplicates that require more evaluation. If you have already merged the obvious duplicates, you will have fewer records to evaluate.

For example, you may want to use the options in this order:

- Use the **Ancestral File Numbers (AFNs)** option twice. First, mark the **Automatically Merge Exact Duplicates** option. Next, unmark it.
- Use the **Unique Record Serial Numbers** option twice. First, mark the **Automatically Merge Exact Duplicates** option. Next, unmark it.
- Use the **Names with Exact Spelling** option twice. First mark the **Consider Middle Names** option. Next, unmark it.
- Use the **Names That Sound Alike (Soundex)** option twice. First mark the **Consider Middle Names** option. Next, unmark it.

Select and merge any remaining duplicate records in the .paf file.

### What happens to merged records?

The program compares the two records. If a field in the Primary Individual's record is blank and the same field on the Duplicate Individual's record contains information, the program marks the field. You can manually mark and unmark each field on the Duplicate Individual. When you merge the record, the program adds the information in the marked fields to the same field in the Primary Individual's record.

Custom events and attributes are combined.

The individuals' notes, sources, and multimedia are combined. If you do not want to combine these items, click the Options button, and unmark the items that you do not want to combine.

Parents are combined.

Marriages are combined.

### How to change the options used to select potential duplicate records

You can change the options that the program uses to determine whether two records may be duplicates.

To have the program find *more* possible duplicates, make one or more of the following changes to the options. (Or to have it find *fewer* possible duplicates, make the opposite changes.):

- Mark the Names that Sound alike (Soundex) option.
- Click the Advanced button. Then make one or more of the following changes:
  - Mark the Include Individuals with No Surname option.
  - Mark the Include Individuals with No Birth Date option.
  - Increase the number shown in the Years between Birth Dates field.
  - Unmark the Consider Ancestral File Numbers (AFNs) option.
  - Unmark the Consider Middle Names option.
  - Unmark the Consider Parents option.

If you are using the Match/Merge feature, you can also have the program do the following:

- Combine both individuals' notes, multimedia, and sources.
- Ask you to confirm each merge.

### Steps

1. From the Merge Individuals screen, click **Options**. Or from the Lists tab of the Reports and Charts screen, click **Duplicate Individuals**, and then **Options**.
2. Select the options that you want. To select advanced options, follow these steps:
  - a. Click **Advanced**.
  - b. Mark the options that you want to use.  
**Tip:** Normally, the program considers only the first given name and the surname when it identifies potential duplicates. For example, William Brandt and William Henry Brandt could be duplicates. If you want the program to consider the entire given name and the surname, mark **Consider Middle Names**.
  - c. Click **OK**.
3. To save the changes, click **OK**.

### How to merge records that you select

If you know that two records are for the same individual, you can find the two records and merge them.

### Steps

1. From the **Tools** menu, select **Match/Merge**.
2. The program asks if you want to make a backup copy. If you do not have a current backup copy, click **Yes**, and make a backup copy.
3. On the Match/Merge Options screen, select the options that you want to use, and click **OK**.
4. To find the record that you want to *keep*, click the **Find** button for the primary person.
5. Find the record you want to keep.
6. To find the *duplicate record*, click the **Find** button for the Duplicate Individual.
7. Find the duplicate record.
8. Select the information that you want to transfer from the duplicate individual to the primary individual.
  - If you do not want to add a piece of information to the primary record, click the checkbox to unmark it.
  - If you want to replace information in the primary individual's record with information in the duplicate individual's record, click the checkbox to mark it.
  - The duplicate individual's spouses and parents will be added to the primary individual if the parents or spouses are different. Mark the checkbox next to the parents if you want the duplicate parents to be the primary parents.
9. Click **Merge**.  
**Tip:** If the merged record lists the same spouse more than once, the spouses also have duplicate records. The program should eventually find and merge them. If you want to verify that they get merged, note the names and RINs of the duplicate spouses.

10. To merge two more records by manual selection, repeat steps 5 through 9. To have the program identify possible duplicate records, click **Next Match**.
11. To quit, click **Close**.

### How to merge records by name

The program can identify records that may be for the same individual. It displays both records so that you can see them. You can then decide whether or not to merge them.

**Tip:** At any time during the merge process, you can click the Options button to change the merge options.

### Steps

1. From the **Tools** menu, select **Match/Merge**.
2. The program asks if you want to make a backup copy. If you do not have a current backup copy, click **Yes**, and make a backup copy.
3. To merge records with names that sound alike, click **Names That Sound Alike (Soundex)**. Or to merge records with exact names, click **Names With Exact Spelling**.
4. If you want to use advanced options, follow these steps:
  - a. Click **Advanced**.
  - b. Mark the options that you want to use.

**Tip:** Normally, the program considers only the first given name and the surname when it identifies potential duplicates. For example, William Brandt and William Henry Brandt could be duplicates. If you want the program to consider the entire given name and the surname, mark **Consider Middle Names**.
  - c. Click **OK**.
5. Click **Next Match**.
6. The program displays the records. Decide if they are for the same individual. To see both individuals' marriage information, click the **Marriage Information** tab. To see both individuals' parents and children, click the **Family Information** tab.
7. If the records are not duplicates, click **Next Match**. Repeat step 6. If they are duplicates, go to the next step.
8. Select the record that you want to keep in the .paf file.

**Tip:** The record on the left (the primary individual) will remain in the .paf file. The record on the right (the duplicate individual) will be deleted. If you would rather keep the record on the right side of the screen as the Primary Record, click **Switch**.
9. Select the information that you want to transfer from the duplicate individual to the primary individual.
  - If you do not want to add a piece of information to the primary record, click the checkbox to unmark it.
  - If you want to replace information in the primary individual's record with information in the duplicate individual's record, click the checkbox to mark it.
  - The duplicate individual's spouses and parents will be added to the primary individual if the parents or spouses are different. Mark the checkbox next to the parents if you want the duplicate parents to be the primary parents.

10. Click **Merge**.

**Tip:** If the merged record lists the same spouse more than once, the spouses also have duplicate records. The program should eventually find and merge them. If you want to verify that they get merged, note the names and RINs of the duplicate spouses.

11. To merge other records, repeat steps 5 to 10.

12. To quit using merge, click **Close**.

### How to merge records by Ancestral File numbers (AFNs)

If you have duplicate records that have the same Ancestral File number, you can have the program quickly identify the duplicate records and merge them.

**Tip:** At any time during the merge process, you can click the Options button to change the merge options.

#### Steps

1. From the **Tools** menu, select **Match/Merge**.
2. The program asks if you want to make a backup copy. If you do not have a current backup copy, click **Yes**, and make a backup copy.
3. On the Match/Merge Options screen, mark **Ancestral File Numbers (AFNs)**.
4. If you want the program to merge identical records without asking you to confirm the merge, mark **Automatically Merge Exact Duplicates**.
5. If you want to use advanced options, follow these steps:
  - a. Click **Advanced**.
  - b. Mark the options that you want to use.
  - c. Click **OK**.
6. Click **Next Match**.
7. The program displays the records. Decide if they are for the same individual. To see both individuals' marriage information, click the **Marriage Information** tab. To see both individuals' parents and children, click the **Family Information** tab.
8. If the records are not duplicates, click **Next Match**. Repeat step 6. If they are duplicates, go to the next step.
9. Select the record that you want to keep in the .paf file.

**Tip:** The record on the left (the primary individual) will remain in the .paf file. The record on the right (the duplicate individual) will be deleted. If you would rather keep the record on the right side of the screen as the Primary Record, click **Switch**.
10. Select the information that you want to transfer from the duplicate individual to the primary individual.
  - If you do not want to add a piece of information to the primary record, click the checkbox to unmark it.
  - If you want to replace information in the primary individual's record with information in the duplicate individual's record, click the checkbox to mark it.
  - The duplicate individual's spouses and parents will be added to the primary individual if the parents or spouses are different. Mark the checkbox next to the parents if you want the duplicate parents to be the primary parents.

11. Click **Merge**.

**Tip:** If the merged record lists the same spouse more than once, the spouses also have duplicate records. The program should eventually find and merge them. If you want to verify that they get merged, note the names and RINs of the duplicate spouses.

12. To merge other records, repeat steps 5 through 10.

13. To quit using merge, click **Close**.

### How to merge records by unique record serial number

If you sent a GEDCOM file to another person and he or she returns a GEDCOM file with some of the same records in it, you can quickly merge the duplicates with the Unique Record Serial Number option.

#### Steps

1. From the **Tools** menu, select **Match/Merge**.

2. The program asks if you want to make a backup copy. If you do not have a current backup copy, click **Yes**, and make a backup copy.

3. On the Match/Merge Options screen, mark **Unique Record Serial Numbers**.

4. If you want the program to merge identical records without asking you to confirm the merge, mark **Automatically Merge Exact Duplicates**.

5. Click **Next Match**.

6. The program displays the records. Decide if they are for the same individual. To see both individuals' marriage information, click the **Marriage Information** tab. To see both individuals' parents and children, click the **Family Information** tab.

7. If the records are not duplicates, click **Next Match**. Repeat step 6. If they are duplicates, go to the next step.

8. Select the record that you want to keep in the .paf file.

**Tip:** The record on the left (the primary individual) will remain in the .paf file. The record on the right (the duplicate individual) will be deleted. If you would rather keep the record on the right side of the screen as the Primary Record, click **Switch**.

9. Select the information that you want to transfer from the duplicate individual to the primary individual.

- If you do not want to add a piece of information to the primary record, click the checkbox to unmark it.
- If you want to replace information in the primary individual's record with information in the duplicate individual's record, click the checkbox to mark it.
- The duplicate individual's spouses and parents will be added to the primary individual if the parents or spouses are different. Mark the checkbox next to the parents if you want the parents shown for the duplicate parents to be the primary parents.

10. Click **Merge**.

**Tip:** If the merged record lists the same spouse more than once, the spouses also have duplicate records. The program should eventually find and merge them. If you want to verify that they get merged, note the names and RINs of the duplicate spouses.

11. To merge other records, repeat steps 5 through 10.
12. To quit, click **Close**.

## Merging sources and repositories

If you have the same source or repository listed several times in the .paf file, you can merge them.

If you eliminate duplicate sources and repositories, you will see the following benefits:

- The Source List and Repository List will be shorter and possibly more manageable.
- Duplicate citations will be merged.
- The .paf file may become smaller.

**Tip:** Before you begin the merge process, you could view the Source List and the Repository List to see what information will be merged.

### Identifying duplicate sources and repositories

The easiest way find out whether you have duplicate individual sources and repositories is to use the Merge Duplicate Sources and Citations feature. The program will identify and merge duplicates only if they are identical, so you will not need to confirm each merge.

When the merge process finishes, the program tells you how many sources, citations, and repositories were merged.

If you want to see what will be merged, you can:

- Look at the Source List. (From the Edit menu, select Source List.) Check each source, and identify duplicates.
- Print a Sources list. Check the list for duplicate source descriptions and repositories.
- Print a Citations Referencing a Source list for duplicate source descriptions and citations.

### How to merge sources and repositories

As you add sources or import records, you might find that you have the same source or repository listed several times in the .paf file. To shorten the lists of repositories and sources, you can merge the duplicates.

#### *Steps*

**Tip:** Before you merge duplicate sources and repositories, you could view the Source List and the Repository List to see what information will be merged.

1. From the **Tools** menu, select **Merge Duplicate Sources**.
2. When the merge is complete, the program tells you how many sources and repositories were merged. Click **OK** to continue.

**Tip:** If you click **Cancel**, the merge process stops after it finishes the merge it is on. All sources and repositories that were merged previously will remain merged.

---

# Setting preferences

On the Preferences screen, you can customize how the program works.

The Preferences screen is divided into several categories, each with its own tab. Click the tab to see the options on it.

## How to set preferences on the General tab

The General tab contains several options that will determine how the program works.

- **Use LDS Data** and **Show LDS Data on Reports.** Use these options to display or hide Latter-day Saint ordinance options on screens and reports.
- **Verify New Places.** Mark this option if you want the program to ask you to verify each new place-name that you type. This can help catch spelling errors.
- **Edit Marriage When Created.** Mark this option if you want the Marriage screen to appear automatically when you add a spouse, child, or parent to an individual.
- **Shade Reports.** Mark this option to turn the shading on or off for reports. To help the print preview feature work more quickly, you can mark the Hide Shading in Print Preview option.
- **Use List When Navigating.** This option affects how children are moved to the primary position on the Family View screen and Pedigree View screen.

Specifically, the option affects which child appears on both the Family View screen and Pedigree View screen when you press the C key and which child appears on the Pedigree View screen when you click the triangular button next to the primary person.

If you mark Use List When Navigating, the last child who was in the primary position will appear. If none of the children has been in the primary position, the Descendancy List appears.

If you do not mark Use List When Navigating, the following will happen:

- If one of the children has already been in the primary position, that child will appear.
- If none of the children has been in the primary position, the oldest child with descendants will appear.
- If none of the children has been in the primary position and none of them have descendants, the youngest child will appear.
- **Treat Enter Key as Tab.** Mark this option if you want to use the Enter key to move the cursor from field to field on many of the data entry screens, such as the Individual and Marriage screens.
- **Allow AFN Edit.** Mark this option if you want to be able to type and edit Ancestral File numbers (AFNs).
- **Display Notes Selector.** The Notes Selector screen lists tags used in your notes and allows you to view all of your notes or only the notes with a particular tag.
- **Backup Frequency.** In this field, type the maximum number of times you want to be able to close the .paf file before the program reminds you to make a backup copy. If you want the program to always remind you to make a backup copy, set

this option to 1. If you do not want the program to ever remind you, set the option to zero (0).

- **Colors.** Click this button to change the colors used in the program.
- **Password.** When you set a password, remember these things:
  - The password does not take effect until you exit and restart the program.
  - The password applies to all of the .paf files on the computer. After you type the password to edit one .paf file, you can edit all of them.
  - To remove a password, you simply return to the Preferences screen and delete it.
  - To change a password, you return to the Preferences screen and type a new one.
  - The password is case sensitive. This means that if you type Spot for your password, you must later type Spot, not spot or SPOT, to make changes.
  - To change or remove your password, you must know the current password. If you forget your password, you must use the Windows Registry Editor to remove it. Unless you are very experienced with the Registry and the Windows operating system, you should not attempt to do this without assistance. In the Windows Registry, go to the key “HKEY\_CURRENT\_USER\Software\LDS Church\FamilySearch\Personal Ancestral File 5\Options,” and remove the value named “Pwd.”

### *Steps*

1. From the **Tools** menu, select **Preferences**.
2. Click the **General** tab.
3. Select the options that you want.
4. Select the screen colors:
  - a. Click **Colors**.
  - b. From the drop-down box, select the screen item whose color you want to change.
  - c. Click **Change Color**, and select or create the color you want. Or if you want to return all of the screen items to the default colors, click **Windows Colors**.
5. If you want a password, follow these steps:
  - a. Click **Password**.
  - b. If the .paf file already has a password, type it, and click **OK**.
  - c. Type the password that you want to use. Or if you want to remove the password, delete the existing password
  - d. Click **OK**.
6. If you do not want to set any more preferences, click **OK**.

### **How to set preferences on the File tab**

The File tab contains several options that will determine how this .paf file works.

- **RIN of Home Person on File Open.** You can specify the individual that you want to appear in the primary position when you first open a .paf file.
- **Relationship Indicators.** Relationship indicators show the relationship of everyone in the .paf file to a root person. The indicators appear on the status bar in the lower left corner of the Family View screen and Pedigree View screen.



- **Log Changes.** If you want the program to keep track of all changes made to a .paf file, click here. The changes will be made to the file specified on the screen.

**Tip:** The log will be created in English.

### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the **File** tab.
3. Select the RIN of the individual that you want to appear when you first open the .paf file.
  - Click **Last used** if you want the same individual that appeared in the primary position when the .paf file was last closed to be in that position when you next open the .paf file.
  - Click **Use** if you want to specify the RIN of the individual that you want in the primary position. Type the RIN. If you do not know it, click **Search**.
4. If you want to view relationship indicators, follow these steps:
  - a. Click **Change**.
  - b. If the correct root person is not showing, click **Search** to find the correct individual.

**Tip:** The root person is the individual that all relationships are based on.
  - c. Click **Show Relationships on Status Bar**.
  - d. Click **OK**.
5. If you want the program to track the changes that you make in the .paf file, click **Log to....**
  - Click **View** to view the log in a text editor.
  - Click **Flush** to empty the log.
6. If you do not want to set any more preferences, click **OK**.

### Understanding the log

You can keep a log that shows you when changes were made to the .paf file. The log contains the date and time and a code that indicates what changes were made.

Keeping this log is useful, especially if you ever wonder if you have made a mistake or if you are coordinating research efforts with someone else.

The log report is in English only.

**Tip:** From time to time, flush or delete the log file.

- **Log Entry:** 3-12-97 11:29 Mod Ind 1  
**Meaning:** On 12 March 1997, the individual record with RIN 1 was modified.
- **Log Entry:** 3-12-97 11:35 Mod Nts 15  
**Meaning:** On 12 March 1997, the notes for the individual record with RIN 15 were modified.
- **Log Entry:** 3-12-97 11:41 Unl Ch 62 10  
**Meaning:** On 12 March 1997, the child with RIN 62 was unlinked from marriage (MRIN) 10.
- **Log Entry:** 3-12-97 11:41 Unl Sp 63 10  
**Meaning:** On 12 March 1997, that the spouse with RIN 63 was unlinked from marriage (MRIN) 10.

- **Log Entry:** 3-12-97 11:41 Del Mar 10  
**Meaning:** On 12 March 1997, MRIN 10 was deleted.

### How to set preferences on the Names tab

The Names tab contains several options that affect how the program handles names:

- **Automatically Mark Surname When Names Are Typed and Assume the Following Order.** On the Individual screen, you need to designate the surname with slash marks (/), such as William Henry /Brandt/. Use these options to have the program automatically add the slash marks for you. You can specify where the surname will be.  
**Important:** If you change the above options, the program *does not* change all of the names that you already typed. If surnames have been marked incorrectly, you will need to edit each individual record separately.
- **Verify Surname Marks.** Mark this option if you want the program to ask you to verify each name that you type.
- **Capitalize Surnames on Screens and Reports.** The program can display and print surnames in all uppercase letters.
- **Use Father's Surname When Adding a Child.** Mark this option if you want the program to automatically add the father's surname to the Full Name field when you add a child's individual record.
- **Append to Names.** You can select what information, if any, you want next to an individual's name.

#### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the **Names** tab.
3. Select the options that you want.
4. If you do not want to set any more preferences, click **OK**.

### How to set preferences on the Prepared By tab

Use the Prepared By tab to type your name, address, phone number, and e-mail address. The program uses this information when you export GEDCOM files, print reports, and create web pages.

#### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the **Prepared By** tab.
3. Type your name, address, and other information.  
**Tip:** If you type your telephone number here and then submit information to Ancestral File or Pedigree Resource File, your telephone number will not be shown on any database that is made available to the public.
4. If you want this name and address to appear on the Prepared By tab of new .paf files, click **Save As Default**.
5. If you do not want to set any more preferences, click **OK**.

### How to set preferences on the InfoBox tab

An InfoBox is a box that appears in Pedigree View to provide additional information about an individual and to allow you to display spouses and children.

You can use two types of InfoBoxes:

- **Floating InfoBoxes** appear when you pause your cursor over the name of an individual. You can choose whether the floating InfoBox appears, what information it contains, and how long you will have to pause the cursor before the box appears.
- **Locked InfoBoxes** appear when you click an individual or highlight an individual and press the spacebar. You can choose whether a locked InfoBox appears and how much information it contains.

### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the **InfoBox** tab.
3. Select how you want both types of InfoBoxes to appear:
  - Click **None** if you do not want to use that type of InfoBox.
  - Click **Dates Only** if you want the InfoBox to display marriage, birth, and death dates and places and completed ordinance codes.
  - Click **Dates and Family Information** if you want event information as well as spouses and children to appear. If you mark this option for Locked InfoBoxes, you will be able to move an individual shown in the InfoBox to the primary position of the Pedigree View screen.
4. If you do not want to set any more preferences, click **OK**.

### How to set preferences on the Fonts tab

Use the Fonts tab to change the fonts that are used in the program:

- **Main Screen.** You can choose the font that the program uses on the Family View screen, Pedigree View screen, and Individual View tab.
- **Dialogs.** You can choose the font that is used on the screens.
- **Notes Edit Screen.** You can choose the font that the program uses to display notes on the screen.
- **Notes on Reports.** You can choose the font that the program uses to print notes on reports.

### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the **Fonts** tab.
3. Click the **Change** button for the font that you want to change. Or click **Defaults** to return to the fonts initially specified when you installed the program.  
**Tip:** The Notes Edit Screen font is used to display information on the Notes screen (where you add and edit notes). It is not the font used to print notes on reports.
4. Select the font you want, and click **OK**.  
**Tip:** If the program does not accurately display and print diacritics and other special characters, select a Unicode font, such as Arial Unicode, Tahoma, Verdana, or Andale WT J. Andale WT J is available on the compact disc that the program came on. You can also download the font from the same place where you downloaded the program.
5. If you do not want to set any more preferences, click **OK**.

## How to set preferences on the Multimedia tab

The options on this screen determine how the program will handle multimedia.

- **Slide Show Options.** These options determine how long each photo, video clip, or sound clip should stay on the screen during a slide show. You can also select how large these items should be.
- **Background Color.** You can select the background color for slide shows and scrapbooks. By default, slide shows use black, and scrapbooks use white.
- **Show Default Photo in Family View.** Click here if you want to see the default photo of the primary person on the Family View screen.
- **Print Preview.** Use this option if you do not want to see the actual photos in print preview. This can help speed up the print preview because the program does not have to load the pictures from your disk to show them on the preview screen. Instead of the picture, you will see a gray place holder that shows the size and placement of the photo.
- **Photo Display.** Any time a photo has to be adjusted from its default size, it must be scaled. Scaling a photo can take quite a long time. You can choose whether you want the program to display a picture quickly and sacrifice some quality or whether you would rather wait for a high-quality display.

### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the **Multimedia** tab.
3. Select the Slide Show options.
4. Select the background color for your slide shows:
  - a. From the drop-down box, select **Slide Show** or **Scrapbook**.
  - b. Click **Color**.
  - c. Click the color that you want to use.
  - d. Click **OK**.
5. Click **Use Photo Placeholders** if you do not want to see the actual photos in print preview.
6. Select the Photo Display options.
  - Click **Fast** if you want speed rather than quality.
  - Click **Quality** if you want quality.
7. Select whether you want to display the default photo on the Family View screen.
8. If you do not want to set any more preferences, click **OK**.

## How to set preferences on the Formats tab

The Formats tab has 4 settings:

- **Clipping Method.** At times, names and places are too long to fit both on screen and in reports. You can choose how the program shortens the name or place. An example below the options demonstrates how each option would affect names on the screen.
- **Place Level Importance.** When a place-name does not fit on the screen or in a report, you adjust both the clipping method described above and the place level to be dropped or clipped.

- **Date Entry.** You can choose how the program interprets dates that you type in all numbers.
- **Date Display Styles.** This option enables you to select how dates are displayed.

### *Steps*

1. From the **Tools** menu, select **Preferences**.
2. Click the **Formats** tab.
3. Select the clipping method that you want to use.
  - Click **Truncate** to show as much as possible but clip off the portion that does not fit.
  - Click **Initials** to show the first letter of the words.
4. Select the place level importance.  
**Tip:** Select different options and watch how the example on the screen changes.
5. Select the date entry that you want.
  - Click **U.S.** to type the month first. For example, 3/11/1955 is 11 March 1955.
  - Click **European**, to type the day of the month first. For example, 3/11/1955 is 3 November 1955.
6. Select the style for dates.
  - You can select the order in which dates are displayed.
  - You can select how months are displayed.  
**Tip:** If you select a numeric format for the month, you will need to choose a separator. This determines whether a space or character will appear between the month, day, and year.
7. If you do not want to set any more preferences, click **OK**.

### **How to set preferences on the Folders tab**

When you save your family information, you are saving it to a certain location or folder. Just as you fill a manila folder with information and then mark on it what it contains, you can also save your information in computer folders. Give the folders names that signify what is inside each folder. You can select the folders where the program will store various types of files.

- **PAF files.** Type the path and folder where you want to store .paf files.
- **Import/Export.** Type the path and folder where you want to store GEDCOM files.
- **Backup.** Type the path and folder where you want to store your backup copies.
- **Reports.** Type the path and folder where you want to store reports that you save as files.
- **Web Pages.** Type the path and folder where you want to store the web pages that you create with Personal Ancestral File.

### *Steps*

1. From the **Tools** menu, select **Preferences**.
2. Click the **Folders** tab.

3. For each option, type the drive and folder where you want to store the various types of files. If you do not know the drive and folder, click ... and find it.  
**Tip:** If you want to save files to a floppy drive, type **A:\** or the letter of your floppy drive.
4. If you do not want to set any more preferences, click **OK**.

### How to set preferences on the Templates tab

For the Individual and Marriage screens, you can determine what fields the screens contain and what order they appear in.

This feature is very useful if you routinely use some fields and ignore others.

#### Steps

1. From the **Tools** menu, select **Preferences**.
2. Click the Templates tab.
3. If you want to select or define a template for the Individual screen, click Individual. If you want to select or define a template for the Marriage screen, click Marriage.
4. To add a new template, click Add, and create the template. See “How to create or modify a template” (p. 159).
5. Select the active template that you want to use. See “How to select the active (default) template” (p. 160).
6. If you do not want to set any more preferences, click **OK**.

### Using templates

Templates allow you to customize the Individual and Marriage screens. Templates can help speed up your data entry because:

- The template contains only the fields that you use routinely. You will not have to constantly move the cursor through fields that you never use to get to a field that you always use.
- The fields can be in the order that best meets your needs.
- If you almost always add the same custom event or attribute to the Individual or Marriage screen, you may want to add it to the template. The custom event or attribute will always appear on the screen when you use that template.
- You can create and use many templates in the same .paf file. This is useful if you have different lines of ancestry that require different fields. For example, you may use one template for a German line and another template for a Japanese line.
- You can also specify an active (default) template. The program displays the active template each time you add a new individual record or marriage record. If needed, you can then select a different template.

### Understanding the Phonetic Name and Romanized Name fields

The Phonetic Name and Romanized Name fields are used for Asian languages.

- **Phonetic Name.** In Chinese, Japanese, and Korean, the written name does not indicate how the name should be pronounced. In this field, type the characters that represent a name's pronunciation.
- **Romanized Name.** In this field, you can type the name in the roman alphabet, which is used for languages such as English, German, French, and Spanish.

## How to create or modify a template

When you create and modify templates, you select the groups and fields that will appear on the screen:

- **Groups.** Groups describe a group of fields. For example, a group that is called Names might contain fields such as Full Name, Nickname, Alias, and Married Name. On the Individual or Marriage screen, group names appear as a bar above the group of fields. They help you organize the fields on the Individual and Marriage screens.
- **Fields.** Fields are the places on the Individual or Marriage screen where you can type information.

**Note:** When you remove a field from a template and if you have typed information into that field, the information will not be deleted from the record. However, it will not be visible unless you display the record with a template that contains the field.

### Steps

**Tip:** You can also start from the Individual screen or Marriage screen. From the Template drop-down box, select **Define a New Template**. Start with step 3, below.

1. From the **Tools** menu, select **Preferences**.
2. Click the **Templates** tab.
3. To add a template for the Individual screen, click **Individual**. Or to add a template for the Marriage screen, click **Marriage**.
4. To add a new template, click **Add**, type a name for the template, and click **OK**. Or to modify an existing template, click the template, and click **Modify**.
5. To add a group to the template, follow these steps:
  - a. Click the  that appears next to OTHER.
  - b. Click **New Group**.
  - c. In the Fields for the Template box, click the item under which the new group should appear.
  - d. Click **>**.
6. To add fields to the template, follow these steps:

**Tip:** In the Possible Fields box, click the  to view the fields available under each group.

  - a. To add all fields in a group, click the group. Or to add one field, click the field name.
  - b. In the Fields for the Template box, click the item under which the field should appear.
  - c. Click **>**.
7. To remove a field or group from the template, follow these steps:

**Tip:** If you remove a group, all fields that are beneath it will also be removed.

  - a. In the Fields for the Template box, click the group or field that you want to remove.
  - b. Click **<**.
8. To move a field or group to a new location on the template, follow these steps:

- a. Click the group or field.
  - b. While you hold the mouse button down, move the mouse to the place where you want it to appear.
  - c. Highlight the group or field under which the items should appear.
  - d. Release the mouse button.
9. To rename a template or group, follow these steps:
- a. In the Fields for the Template box, right-click the name of the template, group, or field.
  - b. Select **Rename**.
  - c. Type the name that you want to use.
  - d. Click **OK**.
5. When you are finished, click **OK**.

### How to delete a template

If you no longer need a template that you created, you can delete it.

If you create a template, use it to add individuals or marriages, and then delete it, the records that you added will not be deleted. Instead, the program will display them with the default template.

#### *Steps*

1. From the **Tools** menu, select **Preferences**.
2. Click the **Templates** tab.
3. To delete a template for the Individual screen, click **Individual**. Or to delete a template for the Marriage screen, click **Marriage**.
4. Click the template that you want to delete.
5. Click **Delete**.

### How to select the active (default) template

You can select one active template for the Individual screen and one for the Marriage screen.

When you select an active template, it appears each time you add a new individual or marriage.

If you want to use a different template for a particular individual or marriage, you can select it when you add the information. The next time that you edit the record, the active template appears.

#### *Steps*

1. From the **Tools** menu, select **Preferences**.
2. Click the **Templates** tab.
3. To select the active template for the Individual screen, click **Individual**. Or to select the active template for the Marriage screen, click **Marriage**.
4. Click the template that you want.
5. Click **Make Active**. Or to use the program's original template, click **Clear Active**.



**How to select a template for an individual record or marriage record**

When you add a new individual or marriage to the .paf file, you can select a different template than the one that is currently shown.

***Steps***

On the Individual screen or the Marriage screen, on the Template drop-down box, select the template that you would like to use.

---

# Making global changes

You can use the Global Search and Replace feature to change all instances of the following information:

- **All or part of a place-name.** This is useful if you need to correct spelling errors, add missing place levels, and spell out abbreviations. For example, you could change all occurrences of “Chicago, IL” to “Chicago, Cook, Illinois.” Or you could simply change all instances of “IL,” to “Illinois.”
- **All or part of the path and name of a multimedia file.** This is useful if you have changed the name of a multimedia file, if you would rather use a different file instead of one that is currently in the .paf file, or if you moved your multimedia files to a new folder.

The .paf file does not store the multimedia file itself; it stores only the path where the file can be found. If you move multimedia files from one folder to another, the program will not be able to find them. With the Global Search and Replace feature you can change the references to all of your multimedia files at once, saving you the time of changing each multimedia file one at a time.

- **A date.** This is useful if you want to search for a word or abbreviation, such as “Submitted,” in a date field and remove or change it.
- **Names.** This is useful if you want to make the same change to the Full Name field in several records. For example, you can correct spelling errors, standardize spelling variations, change placement of slash marks (/), and correct capitalization errors made by the Change Names to Mixed Case feature.
- **Temple codes.** This is useful if you want to change two-letter temple codes to their four- or five-letter equivalent.
- **Notes.** This is useful if you want to change the same word or phrase within all of the notes in a .paf file, mark a certain note as confidential, or make other similar changes.

**Tip:** If you want to make global changes to other types of information, use the Advanced Focus/Filter feature.

## How to make global changes

You can use the Global Search and Replace feature to change names, notes, temple codes, place-names, dates, and the paths and names of multimedia files.

### *Steps*

**Tip:** Before you use the Global Search and Replace feature make a backup copy of the .paf file. The program will not ask you to confirm each change. Nor can you undo the changes afterwards.

1. From the **Tools** menu, select **Global Search and Replace**.
2. From the **Search and Replace Text In** drop-down box, select the type of global change that you want to make.

3. In the **Search For** field, type the text as it currently appears in the .paf file.  
**Warning:** Use caution when you type information in the Search For field, especially when you want to spell out abbreviations. If you search for “IL” the program finds every place-name that contains “il” anywhere in a word. You may want to use spaces, commas (,), and periods (.) to indicate the beginning or ending of a word. You may also want to use the Case Sensitive Search option.
4. In the **Replace With** field, type the text that you want to change the text to.
5. If you want the search to be case sensitive, mark **Case Sensitive Search**.  
**Tip:** Case sensitive means that the search will consider uppercase and lowercase letters. If, for example, the search is case sensitive and you look for Mexico, the search will not find mexico.
6. If you want to print a report that lists all of the records that were changed, mark **Create Report of Records Changed**.
7. Click **OK**.

---

# Changing surnames to mixed case

You should type surnames (last names) in uppercase and lowercase letters. For example, type McKay, not MCKAY. This will help prevent confusion about how a name should be capitalized.

If you have typed names in all uppercase letters, or if you have imported a file that contains names typed in all uppercase letters, you can change them to uppercase and lowercase letters.

**Tip:** On the Preferences screen, on the Names tab, you can choose to display and print surnames in all uppercase letters.

## How to change surnames to mixed case

If you have typed names in all uppercase letters, or if you have imported a file that contains names typed in all uppercase letters, you can change them to uppercase and lowercase letters.

### *Steps*

1. From the **Tools** menu, select **Change Names to Mixed Case**.
2. The program asks if you want to continue. Click **Yes**.
3. When you is finished, the program will tell you how many names were checked and how many were changed. Click **OK**.

**Tip:** If uppercase letters in some of the names were changed incorrectly to lowercase letters, you can use the Global Search and Replace feature to change them.

See “How to make global changes” (p. 162).

---

# Using the Relationship Calculator

Use the Relationship Calculator to find the relationship between any two individuals in your file. After you identify two individuals, the program searches back generation by generation until it finds an ancestor common to the two. It then calculates the relationship.

The program *will not* show the following types of relationships:

- In-law or step-family relationships
- Aunt and uncle relationships by marriage

## How to calculate the relationship between two individuals

You can determine the relationship between two individuals in the .paf file.

**Tip:** You can also display the relationship of an individual in the .paf file to the home person. This feature is called Relationship Indicators. You can turn it on and off in Preferences. You can also select the home person.

### *Steps*

1. From the **Tools** menu, select **Relationship Calculator**.
2. The individual who was selected on the previous screen appears as the first individual. To select a different individual, click the first **Search** button.
3. To select the second individual, click the second **Search** button.
4. Click **Calculate**.
5. The relationship(s) that the individuals have will appear. To calculate another relationship, repeat steps 2 to 4.
6. When you are finished using the relationship calculator, click **Close**.

---

# Using the Date Calculator

With the Date Calculator you can:

- Calculate the time elapsed between any two dates within the Gregorian calendar.
- Calculate a date based on one date and an elapsed amount of time.

The Date Calculator works for the Gregorian calendar only. It does not work for other calendars or for dates before October 1752. Before this date, a country may have been using the Julian calendar, for which the Date Calculator cannot calculate dates.

## What is the Gregorian Calendar?

The Gregorian calendar is the calendar commonly used in Western and Westernized countries. It corrected the Julian calendar, which, because of miscalculated leap years, fell behind the solar year by several days.

The Gregorian calendar is divided into 12 months: January, February, March, April, May, June, July, August, September, October, November, and December. The first day of the year is 1 January.

Different countries began using the Gregorian calendar at different times. Some adopted it as early as 1699. Other adopted it as late as 1927. Many countries do not use it.

When a country switched from the Julian calendar to the Gregorian calendar, several days were omitted to bring the calendar in line with the solar year. Also at that time, the first day of the year changed from 25 March to 1 January.

## How to calculate a date based on one date and an elapsed amount of time

If you know one date and an elapsed amount of time, you can calculate a second date.

### *Steps*

1. From the **Tools** menu, select **Date Calculator**. Or on the Individual screen, click **Options**, and select **Date Calculator**.
2. Select the starting or ending date on the calendar. Or in the Start Date or End Date field, type the date.
3. Type the years, months, and days in the fields in the middle of the screen.
4. Click **Calculate**. The other date appears.
5. If you want to use the Date Calculator again, click **Clear Fields**.
6. When you are finished using the date calculator, click **Close**.

## How to calculate the elapsed time between two dates

If you know two dates, you can calculate the years, months, and days between them.

### *Steps*

1. From the **Tools** menu, select **Date Calculator**. Or on the Individual screen, click **Options**, and select **Date Calculator**.
2. Select the starting date on the calendar. Or in the Start Date field, type the date.
3. Select the ending date on the calculator. Or in the End Date field, type the date.

4. Click **Calculate**. The elapsed time appears in the fields in the middle of the screen.
5. If you want to use the Date Calculator again, click **Clear Fields**.
6. When you are finished using the date calculator, click **Close**.

---

# Using the Soundex Calculator

Soundex is a type of index that groups together surnames that sound similar but are spelled differently. Each surname is assigned a code. The code consists of the first letter of the name and three numbers based on the next three consonants of the surname. Vowels are ignored. Soundex has been used to index the 1880, 1900, 1910, and 1920 United States censuses and some other types of records, such as naturalization records and passenger lists.

Use the Soundex calculator to determine a surname's Soundex code.

**Tip:** Soundex works fairly well with names as they are pronounced in English. It may not work as well with other languages. Therefore, you may or may not find the Soundex Calculator to be useful. It does not work for names written in nonroman writing systems, such as Cyrillic, Japanese, Chinese, and Korean.

## How to calculate a Soundex code with the Soundex Calculator

Use the Soundex Calculator to quickly calculate a Soundex code.

**Tip:** Soundex works fairly well with names as they are pronounced in English. It may not work as well with other languages. Therefore, you may or may not find the Soundex Calculator to be useful. It does not work for names written in nonroman writing systems, such as Cyrillic, Japanese, Chinese, and Korean.

### *Steps*

1. From the **Tools** menu, select **Soundex Calculator**.
2. Type the surname. As you type, the code appears under the name field.
3. To calculate another name, delete the first name, and type another.
4. When you are finished, click **Close**.

## How to manually calculate a Soundex code

Soundex uses a code made up of a combination of letters and numbers to represent how a name sounds, rather than how it is spelled. Most variations in spelling or misspelling should produce the same code number. For example:

SMITH=S530 SMITHE=S530  
SMYTH=S530 SMYTHER=S530

**Tip:** Soundex works fairly well with names as they are pronounced in English. It may not work as well with other languages. Therefore, you may or may not find the Soundex Calculator to be useful. It does not work for names written in nonroman writing systems, such as Cyrillic, Japanese, Chinese, and Korean.



**Steps**

1. Write down the first letter of the name.
2. Assign code values to other letters as follows:

Code	Letters
1	b, f, p, v
2	c, g, j, k, q, s, x, z
3	d, t
4	l
5	m, n
6	r

- Do not code the letters *a, e, i, o, u, h, w,* and *y*.
  - If a name has the same letter twice in a row, code it as if it were one letter. In the name Kelly, for example, you would code the two “l’s” as just one.
  - If the name does not have enough letters to make three digits, add enough zeros to make 3 digits. For example, the surname Kelly has only one letter that can be coded. Therefore, the Soundex code is K400.
  - For names such as Mc Carthy or McCarthy, Personal Ancestral File ignores the space. Therefore, McCarthy and Mc Carthy are both M263. Other Soundex calculators may consider the spaces. In these instances, McCarthy is M263, since the two “C’s” are counted one letter. In Mc Carthy, the two “C’s” are counted as separate letters, so the code is M226.
3. When you have 3 digits in the code, stop, even if the surname has more letters.  
**Tip:** The first letter of the code is not counted as one of the three digits.

---

# Conducting Internet searches

If you have an Internet connection, you can select an individual and search for information about him or her on the FamilySearch Internet Genealogy Service ([www.familysearch.org](http://www.familysearch.org)).

**Tip:** If from the Tools menu you select FamilySearch Internet Genealogy Service, the program accesses the Internet, and goes to [www.familysearch.org](http://www.familysearch.org). It does not, however, conduct a search on the selected individual.

## How to conduct Internet searches

You can use the Internet to find more information about the individuals in the .paf file. In Personal Ancestral File, you can select an individual and an Internet site to search.

### *Steps*

1. On the Family View screen or Pedigree View screen, select the individual that you want to search for.
2. From the **Search** menu, select the Internet search site that you want to search. This accesses the Internet site that you selected and returns a list of possible hits.
3. If the search finds information, you will need to search each hit and determine whether it refers to the individual in the .paf file.

---

# Using Notepad for Personal Ancestral File

Personal Ancestral File displays the following reports in a program named Notepad:

- The report generated when you use the Check/Repair feature.
- The report generated when you finish creating a file to use in TempleReady.
- The listing file created as you import GEDCOM files into Personal Ancestral File.
- The .pal file, which is the log of changes made to a .paf file.

**Tip:** Personal Ancestral File uses a customized version of Notepad because the version that comes with Windows may not accurately display nonroman characters (such as from Japanese, Chinese, and Korean).

## How to open Notepad documents

When Personal Ancestral File creates a Notepad document, it opens Notepad and displays the document. You can also start Notepad and open a document that was created previously.

**Tip:** If you want to open the changes log (the .pal file), it is faster to do so from the Preferences screen. On the File tab, click the View button.

### *Steps*

1. If Notepad is not open, from the **Tools** menu, select **Notepad**.
2. From the **File** menu, select **Open**.
3. If the text file you want is not displayed, find the drive and folder where it is stored.
4. Click the file name.
5. Click **Open**.

## How to set the font of a Notepad document

You can change the font used in Notepad documents. This is especially useful, for example, if you want to increase the font size to one that you can see on the screen more easily or if you want to select a smaller font size so that a printed copy of the document will not require as many pages.

When you set the font, all of the text in a Notepad document uses the same font. You cannot use more than one font, font style, size, and script in the same Notepad document.

### *Steps*

1. If Notepad is not open, from the **Tools** menu, select **Notepad**.
2. If the file that you want to use is not open, open it.
3. From the **Edit** menu, select **Set Font**.
4. Select the font, font style, size, and script that you want, and click **OK**.

### How to add, edit, and delete text in a Notepad document

You can add, edit, and delete text from Notepad documents.

**Tip:** If you want to delete everything in the changes log (a .pal file), it is faster to do so from the Preferences screen. On the File tab, click the Flush button.

#### Steps

1. If Notepad is not open, from the **Tools** menu, select **Notepad**.
2. If the file that you want to use is not open, open it.
3. If needed, move the cursor to the place where you want to add, edit, or delete text.
4. Add, edit, or delete the text that you want.
5. To save the changes with the same file name, from the **File** menu, select **Save**. Or to save the changes with a new file name, follow these steps:
  - a. From the **File** menu, select **Save As**.
  - b. Select the drive and folder where you want to save the file.
  - c. Type a name for the file, and click **Save**.

### How to go to a specific line in a Notepad document

Each line of text in a Notepad document has a number. Though you cannot see this number on the screen, you can use it to move to a specific spot in the document.

**Tip:** To find a specific word or combination of words, use the Find feature.

See “How to find text in a Notepad document” (p. 172).

#### Steps

1. If Notepad is not open, from the Tools menu, select Notepad.
2. If the file that you want to use is not open, open it.
3. From the **Edit** menu, select **Go to Line**.
4. Type the number of the line, and click **OK**.

### How to find text in a Notepad document

You can find and replace text in a Notepad document.

**Tip:** This find and replace feature begins the search at the cursor, searches to the end of the text that is on the screen, and stops. If you want to search from the beginning of the file, put the cursor at the beginning of the file.

#### Steps

1. If Notepad is not open, from the **Tools** menu, select **Notepad**.
2. If the file that you want to use is not open, open it.
3. Put your cursor where you want to begin the search.
4. From the **Edit** menu, select **Find**.
5. To search and replace text, click the **Replace** tab.
6. In the Find What field, type the text that you want to find. To search and replace text, in the Replace With field, type the text that will replace the text in the Find What field.
7. If you want the search to be case sensitive, mark **Match Case**.

**Tip:** Case sensitive means that the search will consider uppercase and lowercase letters. If, for example, the search is case sensitive and you look for Mexico, the search will not find mexico.

8. If you want the search to find only the words you type as whole words, mark **Find Whole Words Only**.
9. Click **Find Next**.

### **How to print Notepad documents**

If needed, you can print Notepad documents.

#### *Steps*

1. If Notepad is not open, from the **Tools** menu, select **Notepad**.
2. If the file that you want to print is not open, open it.
3. From the **File** menu, select **Print**.

### **How to close a Notepad document**

When you are finished with a Notepad document, you can close the document and exit Notepad.

#### *Steps*

1. If you want to close Notepad, from the **File** menu, select **Exit**. Or if you want to create a new document, from the **File** menu, select **New**.
2. If you have not made changes to the document, Notepad either closes or displays a new document.

If you have made changes, the program asks if you want to save your changes. If you want to save your changes, follow these steps:

- a. Click **Yes**.
- b. Select the drive and folder where you want to save the file.
- c. Click **Save**.

---

# Glossary

## ***Ahnentafel chart***

A table that lists the name, date, and place of birth, marriage, and death for an individual and specified number of his or her ancestors. The first individual on the list is number one, the father is number two, the mother is number three, the paternal grandfather is number four, the paternal grandmother is number five, and so forth. Ahnentafel is a German word that means ancestor chart or ancestor table. This is also called a continental pedigree.

## ***Also Known As***

A field on the Individual screen where you can type the other names by which a person was known.

## ***Ancestral File***

A computer file containing names and often other vital information (such as date and place of birth, marriage, or death) of millions of individuals who have lived throughout the world. Names are organized into family groups and pedigrees. To allow you to coordinate research, the file also lists names and addresses of those who contributed to the file. Ancestral File, which was created by The Church of Jesus Christ of Latter-day Saints, is available on compact disc at Family History Centers and some public libraries and on the Internet at [www.familysearch.org](http://www.familysearch.org).

## ***Ancestral File number (AFN)***

A number used to identify each record in Ancestral File.

## ***Ancestry chart***

A pedigree chart that contains only names and limited information about the people on it.

## ***ANSEL character set***

A set of characters used in computers. ANSEL contains the characters in the ASCII character set as well as many non-English and other characters. The program uses the ANSEL character set rather than the ANSI, which uses a different technique to define the non-ASCII characters.

## ***ANSI character set***

The set of characters that are used in Windows. This set of characters includes the standard ASCII characters as well as math symbols, non-English diacritics, and special characters.

### ***ASCII***

A basic set of standard letters, numbers, and other symbols used in computers. ASCII is the most universal set of characters for a computer, but it is also the most limited.

### ***Baptism***

The introductory ordinance into The Church of Jesus Christ of Latter-day Saints. The Church practices baptism by immersion for the remission of sins. The ordinance symbolizes the individual's rebirth as a disciple of Jesus Christ.

### ***Books***

An option that allows you to print Ahnentafel charts or modified registers.

### ***Calendar***

An option that allows you to print calendars that show names, birth dates, and other information about individuals in a .paf file.

### ***Call number***

The number used to identify a book, microfilm, microfiche, or other source in a library or archive. Library materials are stored and retrieved by call number.

### ***Caption***

Text that briefly describes a multimedia file.

### ***Cascading family group record***

An option that allows you to print family group records for a specified number of generations in a family. If you printed a cascading pedigree you could select the same starting person and number of generations to print a family group record for each couple in the pedigree charts.

### ***Cascading pedigree***

An option that allows you to print pedigree charts for a specified number of generations. Each page is numbered, which allows you to keep the pages in order.

### ***Cause of Death***

A field on the Individual screen where you can type the reason that a person died.

### ***Char Set***

An abbreviation for character set, the numbers, letters, and other symbols available for use in a computer.

### ***Character map***

A screen that displays all of the numbers, letters, and symbols available in a given font or for a given program.

### ***Check/Repair***

A feature on the File menu that allows you to scan a file for .paf file problems. You can select whether the feature should fix any problems it finds. The feature looks for problems with how the data is stored, not for problems with dates or other information. (To see a list of possible problems with the data itself, print a list of possible problems.)

### ***Child***

An option on the Add menu that allows you to add a child to the selected individual.

### ***Citation***

The part of a source citation that contains the information needed to find a particular piece of information within the source. For example, it might contain a page number of a book or a page and line number of a census.

### ***Confidential data***

Information in a .paf file that should be kept private. Confidential data includes events that have been marked as confidential and notes that have ~ as the first character of the paragraph.

### ***Contact information***

Information used to identify a person to contact about a record in a .paf file. For living individuals, the contact information may list the individual in a .paf file. For deceased individuals, it might be the person who gave you the information, or a close living relative. You can type the name, address, telephone number, e-mail address, and web-site address. The screen where you can type this information is called the Contact Information screen.

### ***Custom event or attribute***

An event that does not usually appear on the Individual and Marriage screens. You can choose from a predefined set of events or add your own. If you use the same event on many individuals or marriages, create a template (a customized screen) for the Individual and Marriage screens. The custom event will appear on the screen, and you will not have to add it to each individual or marriage record.

### ***Custom ID***

A field on the Individual screen where you can type an identification number for an individual. This field is used mainly by genealogists who use a specific numbering system to identify each individual in a .paf file. Do not use this field for social security numbers or any other information that should be kept confidential. In previous versions of Personal Ancestral File, this field was called the ID number.

### ***Custom report***

A list that contains the information that you specify.

### ***Date calculator***

A feature on the Tools menu that allows you to determine the days, months, and years elapsed between two dates or to determine a date based on the amount of time elapsed



before or after a date. For example, this is useful to approximate a birth date for a person who appears in a census.

***Date entry***

An option on the Preferences screen that allows you to select whether the computer interprets dates that are typed in all numbers as U.S. style (3/4/99 means 4 March 1999) or as European style (3/4/99 means 3 April 1999).

***Descendancy chart***

A report that lists an individual and his or her children and their spouses and children.

***Descendancy List***

A feature on the Search menu that displays an individual's descendants and allows you to select an individual to display.

***Description***

Text that describes a multimedia file. The description is generally longer than the caption.

***Diacritics***

A mark over a letter that changes the sound and sometimes the alphabetical order of a letter.

***Duplicate individual***

A record that is for the same individual as another record in a file. If you merge the records, the duplicate record will be deleted from a file.

***End of line***

The last known person in a line of ancestry. An end-of-line person has no parents in the .paf file.

***Endowment***

A priesthood ordinance performed in temples of The Church of Jesus Christ of Latter-day Saints. The endowment explains the purpose of life and Heavenly Father's plan for the exaltation of His children.

***Export***

A feature on the File menu that allows you to save information to use in another genealogical program, to submit to Ancestral File or Pedigree Resource File, or to submit for temple ordinances. Information is saved in GEDCOM format.

***Family group record***

A printed form that lists a family—parents and children—and gives information about dates and places of birth, marriage, and death. This is also called a family group sheet.

### ***Family History SourceGuide***

A computerized reference library of information about how to do family history research. SourceGuide is produced by The Church of Jesus Christ of Latter-day Saints.

### ***FamilySearch***

A term that refers to computer products created by The Church of Jesus Christ of Latter-day Saints that help people learn about their ancestors. FamilySearch products currently include (1) a DOS-based version that includes Ancestral File, the International Genealogical Index, the Military Index, the Social Security Death Index, Scottish Church Records, Personal Ancestral File, and the Family History Library Catalog, and (2) a search service on the World Wide Web that helps people find and share family history information.

### ***FamilySearch Internet Genealogy Service***

A search service on the World Wide Web that helps people find and share family history information. This service is provided by The Church of Jesus Christ of Latter-day Saints.

### ***Family View screen***

A screen that shows an individual and his or her spouse, children, and parents.

### ***Field***

A place on a computer screen where you can type or view information.

### ***Field filter***

An option on the Advanced Search/Focus screen that allows you to select individuals who have similar information in fields in the individual record, marriage record, notes, or sources.

### ***Find by RIN/MRIN***

A feature on the Search menu that allows you to find an individual in a file by RIN or MRIN.

### ***GEDCOM***

The acronym for “GEnealogical Data COMmunications.” GEDCOM is a computer data format created by The Church of Jesus Christ of Latter-day Saints for storing genealogical information so that many computer programs can use it. Personal Ancestral File and FamilySearch both use GEDCOM to share information with each other and with other genealogy programs.

### ***Gregorian calendar***

The calendar commonly used in Western and Westernized countries. It corrected the Julian calendar, which, because of miscalculated leap years, fell behind the solar year by several days.

The Gregorian calendar is divided into 12 months: January, February, March, April, May, June, July, August, September, October, November, and December. The first day of the year is 1 January.

### ***Home person***

A feature on the Search menu that allows you to return to the individual record that is designated to be the home person. To change the home person, change the “RIN of Home Person on File Open” feature in Preferences. The term “home” can also refer to the first person in a .paf file.

### ***Import***

A feature on the File menu that allows you to add information that is stored in a GEDCOM file into a .paf file.

### ***Individual***

A feature on the Edit menu that allows you to edit the selected individual. Also a feature on the Add menu that lets you add an unlinked individual to a file.

### ***Individual List***

A feature on the Search menu that allows you to view a list of the individuals in a file and display them on the Pedigree or Family screen. You can sort the list alphabetically or by RIN.

### ***Individual record***

The computer record that contains a person's name and birth, christening, death, burial, Latter-day Saint ordinance, and other information.

### ***Individual Summary***

A printed version of an individual record.

### ***Individual View screen***

A screen that lists all of the individuals in a .paf file. You can sort this list by name or by RIN.

### ***InfoBoxes***

An option on the Preferences screen that allows you to select how much information you want to display in the Pedigree View screen. Pedigree View displays information in two ways: (1) in a floating box that appears only when you pause your cursor over the name of an individual, or (2) in a locked box that appears only when you click the name of the individual.

### ***Julian calendar***

A calendar introduced in Rome in 46 B.C. This calendar was the basis for the Gregorian calendar, which is in common use today. The Julian calendar specified that the year began on 25 March (Lady's Day) and had 365 days. Each fourth year had a leap day, so it had 366 days. The year was divided into months. Each month had 30 or 31 days, except February, which had 28 days in normal years and 29 days in leap

years. This calendar was used for several centuries but was eventually replaced by the Gregorian calendar because leap years had been miscalculated.

### ***Latter-day Saint data***

Latter-day Saint baptism, endowment, and sealing information stored on individual and marriage records.

### ***Link***

To define family relationships between individual records or to attach a source or multimedia file to an individual or marriage record.

### ***Listing file***

Information from a GEDCOM file that did not fit in an individual record, marriage record, or source. You can put this information into the notes for an individual or marriage, or you can copy it into a separate file.

### ***Lists***

An option that allows you to print various lists.

### ***Living***

A person who is still alive. Personal Ancestral File defines a living person as someone who was born within the last 110 years whose individual record contains no death or burial information.

### ***Log changes***

An option on the Preferences screen that allows you to track any addition, modification, or deletion you make to the individual and marriage records in a .paf file. You can see this file or empty it.

### ***Marriage list***

A feature on the Search menu that displays a list of all of the couples in a .paf file and allows you to display one on the Family or Pedigree screen.

### ***Marriage record***

The computer record that contains a couple's marriage date, place, Latter-day Saint sealing, and other marriage information.

### ***Married Name***

A field on the Individual screen where you can type the name a person adopted after marriage.

### ***Match/Merge***

A feature on the Tools menu that allows you to find duplicate records in a .paf file and combine them into one record.

***Media***

A term used to refer to electronic pictures, sound clips, and video clips. This is also called multimedia.

***Media collection***

A feature that shows you all of the multimedia files that have been linked to an individual, source, or marriage.

***Modified register***

A report that lists an individual and his or her descendants in a narrative form. The first paragraph identifies the individual and explains birth and other event information in complete sentences. The next paragraph describes the person's first spouse. Children and spouses are listed next. If the person had more than one spouse, those spouses and any children appear after that.

***MRIN***

An abbreviation that stands for "Marriage Record Identification Number." Personal Ancestral File assigns each marriage record a unique MRIN and uses it to distinguish one marriage record from another.

***Multimedia***

A term used to refer to electronic pictures, sound clips, and video clips. This is also called media. Also a feature on the Edit menu that allows you to add, change, or remove a multimedia file from the selected individual.

***Multiple parent indicator***

A symbol used on reports that indicate that a person is linked to more than one set of parents.

***Nickname***

A familiar form of a person's name or a descriptive name given to an individual in addition to his or her given name. In Personal Ancestral File, you can type a nickname in the Nickname field of the Individual screen.

***Notes***

Information about an individual, marriage, or set of parents that does not fit in the individual record, the marriage record, or sources. Notes can contain additional information, research notes, or other narrative information. Also a feature on the Edit menu that allows you to add or edit the notes associated with the selected individual or marriage.

***Notes Selector***

A feature that lists tags used in your notes and allows you to view all of your notes or only the notes with a particular tag.

### ***Order Children***

An option on the Edit menu that allows you to change the order of an individual's children. Generally, you will put the children in chronological order by birth dates.

### ***Order Spouses***

An option on the Edit menu that allows you to change the order of an individual's spouses. You can put spouses in chronological order according to the marriage date or in any other order. The spouse listed as number one will be the spouse who appears by default each time the .paf file is opened.

### ***Other events***

An event that does not usually appear on the Individual and Marriage screens. You can choose from a predefined set of events or add your own. If you use the same event on many individuals or marriages, create a template (a customized screen) for the Individual and Marriage screens. The custom event will appear on the screen, and you will not have to add it to each individual or marriage record. This is also called a custom event.

### ***.paf file***

A computer file that contains information that can be used in the program.

### ***Parent Link***

The type of relationship selected for an individual and his or her parents. The options are biological, adopted, guardian, sealing, challenged, and disproved. If a person is linked to only one set of parents, the relationship is assumed to be biological unless you change it. On the Family screen, the parent link appears only if it is something other than biological.

### ***Password***

A set of characters that you can use to prevent another individual from inadvertently changing information.

### ***Pedigree chart***

A chart that shows an individual's direct ancestors—parents, grandparents, great-grandparents, and so forth. A pedigree chart may contain birth, marriage, and death information.

### ***Pedigree Resource File***

A computer file containing names and often other vital information (such as date and place of birth, marriage, or death) of individuals who have lived throughout the world. Names are organized into family groups and pedigrees. Unlike Ancestral File, the information will appear as it was originally submitted and will not be merged with information submitted by others.

### ***Pedigree View screen***

A screen that displays 5 generations of a person's direct-line ancestors.

### ***Physical description***

A field on the Individual screen where you can type the information about a person's appearance.

### ***Prepared by***

An option on the Preferences screen that allows you to type your name, address, telephone number, Ancestral File number, and e-mail address. Personal Ancestral File includes this information when you export and print information from a .paf file.

### ***Primary individual***

On the Family screen, the person in the top, left position. On the Pedigree screen, the person in the first generation position. On the Merge screen, the record displayed on the left side of the screen that will remain in a .paf file after a merge. This is also called the primary position.

### ***Print Reports***

A feature on the File menu that allows you to send information to a printer. You can print pedigree charts, family group records, individual summaries, and many other types of reports.

### ***Properties***

A feature on the File menu that allows you to display statistics about a .paf file, such as the number of individuals, marriages, sources, and so forth.

### ***Relationship calculator***

A feature on the Tools menu that allows you to determine how two individuals are related.

### ***Relationship codes***

A symbol used to represent parent links on reports.

### ***Relationship filter***

An option on the Advanced Search/Focus screen that allows you to select individuals who are related.

### ***Relationship indicators***

Words that show the relationship of everyone in the .paf file to a selected individual (called the root person) in the .paf file. On the screen, the relationship indicators show up on the status bar in the lower left corner of the screen.

### ***Repository***

The place where records are stored, such as an archive or library. In Personal Ancestral File, you can record a repository's name, address, and telephone number.

### ***Repository List***

A feature on the Edit menu that allows you to add, edit, or delete repositories from a .paf file.

### ***Restore***

A feature on the File menu that allows you to use a backup copy to return a .paf file to its state when the backup copy was made.

### ***RIN***

An abbreviation that stands for "Record Identification Number." Personal Ancestral File assigns a unique RIN to each individual record that you type. This number is used to distinguish that individual record from others in a .paf file.

### ***Root person***

The individual on whom the Relationship Indicators option are based. You can specify the root person on the Preferences screen, on the File tab.

### ***Scrapbook***

(1) A report that shows the photographs and other scanned images that are associated with an individual. Each image can be accompanied by its file name, caption, and description. (2) A feature that displays 6 of an individual's photos at a time, along with each photo's description.

### ***Sealing to parents***

A priesthood ordinance performed in temples of The Church of Jesus Christ of Latter-day Saints that makes it possible for the relationships between parents and children to continue after death.

### ***Sealing to spouse***

A priesthood ordinance performed in temples of The Church of Jesus Christ of Latter-day Saints that makes it possible for a husband's and wife's relationship to continue after death.

### ***Slideshow***

A presentation that displays all of the multimedia that is attached to an individual. It displays each item for a specific amount of time, in a sequential fashion.

### ***Soundex***

A type of index that groups surnames that sound similar but are spelled differently. Each surname is assigned a code that consists of the first letter of the name. The next three consonants are assigned a number. Vowels are ignored. Soundex has been used to index the 1880, 1900, 1910, and 1920 United States censuses and some other types of records, such as naturalization records and passenger lists.

### ***Soundex calculator***

A feature on the Tools menu that allows you to calculate the Soundex code for a surname.



### ***Source***

Information that describes the book, certificate, periodical, record, or other place where genealogical information was found.

### ***Source Description***

The portion of a source citation that describes the source as a whole. A source description is stored as a separate record in a .paf file. After you type a source description once, you need only select it from a list to cite it in another place in a .paf file.

### ***Source List***

A feature that lists the source descriptions in a .paf file and allows you to add, edit, copy, or delete them. The Source List is called the Select Source screen or the Edit Source List screen.

### ***Spouse***

A feature on the Add menu that allows you to add the selected person's spouse.

### ***Status bar***

A feature on the View menu that allows you to hide or display the status bar (the bar along the bottom of the Pedigree and Family screens that displays instructions, the file name, and other information about a file).

### ***Tag***

A word or phrase used to classify the information in a note. Tags should be typed in all uppercase letters at the beginning of the note and be followed by a colon.

### ***Tagged notes***

A type of note that uses a keyword to identify the type of information contained in a note. The keyword is typed in all uppercase letters at the beginning of a paragraph and followed by a colon. For example, in the following note, "NAME:" is the tag: "NAME: This person changed her name."

### ***Temple code***

A 4- or 5-letter code that identifies a specific Latter-day Saint temple.

### ***Temple ordinances***

Religious ceremonies performed in a temple of The Church of Jesus Christ of Latter-day Saints by one having priesthood authority.

### ***TempleReady***

A computer program that helps members of The Church of Jesus Christ of Latter-day Saints prepare the names of their ancestors for temple ordinances.

***Title (prefix)***

A field on the Individual screen used for information that should appear before a person's name. It can be used for titles of nobility, scholarship, clergy, etc.

***Toolbar***

A feature on the View menu that allows you to display or hide the toolbar (the row of buttons along the top of the screen).

***Truncate***

To shorten a long personal or place name. Personal Ancestral File sometimes truncates names so they will fit on a screen or report.

***Unicode***

A set of characters used in computers. Unicode contains the characters used in many different languages and allows a computer to display writing from languages such as Japanese, Chinese, Korean, and European languages all at one time.

***Unique record serial number***

A number that is assigned to each record in a .paf file. Like a record identification number (RIN), a unique record serial number identifies each individual in a .paf file. Unlike a RIN, a unique record serial number is unique worldwide. You cannot see a unique serial number on the Individual screen, and you cannot edit it. It can be used to merge duplicate records.

***Unlink***

To remove a relationship between two records. For example, when you unlink individual records, the records stay in the .paf file, but the individuals no longer appear as family members.

***Unlink individual***

A feature on the Edit menu that allows you to remove the family relationship between the individuals.

***UTF8***

A subset of the Unicode character set.

***Wall chart***

A printed ancestry chart or descendancy chart that you can assemble to form one large chart.

---

# Index

## Symbols

.oup file 125  
.paf files. See databases. 18  
.pal file 171  
/(slash marks) 34

## A

abbreviations 43, 45, 46  
    Latter-day Saint ordinance abbreviations 25, 46, 126, 127  
    place-names 45  
    temple codes 125, 162  
absolute paths for multimedia 91, 110  
abt (about) 43  
accent marks 31, 32  
add 33, 61  
    contact information 97, 109  
    custom events 55, 56  
    families 36, 37  
    individuals 33, 34, 35, 36, 37  
    marriages 33, 35, 36, 37  
    multimedia 68, 92  
    notes 84  
    repositories 79  
    sources 58, 61, 62, 67  
    templates 158, 159, 160, 161  
address 97, 154  
    contact information 97, 109  
    preparer's address 154  
    repositories 79  
    web sites and e-mail 77, 97, 154  
Advanced Focus/Filter 100  
    creating focus lists 100, 101, 105  
    examples of using 107, 108, 109, 110  
    printing focus lists 137, 139  
    relationship filters 103  
    retrieving and deleting 102  
    saving focus lists 102  
    using a focus list 100  
    using field filters 103, 105, 106, 107  
AFNs (Ancestral File numbers). See Ancestral File numbers (AFNs). 151

aft (after) 43  
Ahnentafel charts 130  
AKA 43  
aliases 43  
alphabetical lists 28, 98, 100, 132, 137  
    Advanced Focus/Filter 29, 100, 101, 102, 103, 104, 106, 107  
    custom reports 137, 139  
    Individual List 29, 98  
    individual View screen 28, 29, 30  
    printed lists 29, 132  
also known as 43  
ancestors 98, 121, 126  
    displaying 26, 27, 28, 29, 30, 151  
    finding 98, 99, 100, 101, 103  
    printing 126, 127, 128, 129, 130, 132  
    submitting for temple work 103, 121, 122, 123, 124  
Ancestral File 117, 119  
    correcting information 119  
    merging records from 148  
    submitting information to Ancestral File 114, 117, 118, 119  
Ancestral File numbers (AFNs) 151  
    displaying and printing Ancestral File numbers 154  
    editing 151  
    merging records with identical Ancestral File numbers 148  
ancestry charts 129  
ANSEL 115  
ANSI 115  
approximate information 45, 123  
articles in journals and newspapers and magazines 74  
assumed places 45  
audio files 90  
Automatic Match/Manual Merge 142

## B

B.C. dates 43  
baby blessing dates of Latter-day Saints 46

- backup copies 21, 22
- baptisms of Latter-day Saints 46
  - adding 42, 46
  - displaying Latter-day Saint options 151
  - finding records with similar ordinance information 100, 104, 106
  - lists of incomplete ordinances 132
  - printing 126, 127, 132
  - submitting names for temple work 122, 123, 124
- bef (before) 43
- BIC 43
- birth certificates 71
- birth order 49
- bitmaps (.bmp) 90
- blank forms 127, 128
- blessing of infants of Latter-day Saints 46
- books 130
  - books as sources 71, 72
  - printing Ahnentafel and modified register books 130
- born in the covenant (BIC) 43
- C**
- calculated dates (cal) 43
- calculators 165, 166, 168
  - Date Calculator 166
  - Relationship Calculator 165
  - Soundex Calculator 168
- calendars 43, 133, 166
  - calculating dates 166
  - Gregorian calendar 43, 166
  - Japanese Emperor dates 43
  - Julian calendar 166
  - other calendars 43
  - printing calendars of birthdays and anniversaries 133
- cancelled sealings 46
- capital letters 162, 164
- caption of a multimedia file 93
- case studies and examples 71, 107, 108, 109, 110, 142, 143
  - advanced focus/filter 107, 108, 109, 110, 142
  - custom reports 108
  - import and match/merge 142
  - sources 71, 72, 73, 74, 75, 76, 77
- CDs as sources 75
- cemetery names 45
- certificates of births and other events 71
- Change names to mixed case 162, 164
- character map 31, 32
- charts. See reports (printing). 126
- Check/Repair 23, 171
- children 33, 49
  - adding 36, 37
  - changing the order of 49
  - children who die before age 8 43
  - parent links 42
  - removing from families 51
  - stepchildren and adopted children 40, 41, 42
- citations of sources. See source citations. 58
- clans 43
- Cleared (Cle) in ordinance fields 123
- compact discs as sources 75
- Compuserve PNG (.png) 90
- confirmation dates of Latter-day Saints 46
- contact information 97, 109
- continental pedigree 130
- copy 38, 62
  - information on the Individual screen and Marriage screen 38, 39
  - notes 39, 85
  - sources 62, 63
- Copy command 39
- copyright 118
- correct. See edit. 48, 64
- correspondence 76
- custom events and attributes 55
  - adding 55, 56
  - converting from notes 82
  - deleting 57
  - editing 56
  - removing from the Individual screen and Marriage screen 56
  - templates 159
  - using 55
- custom reports 137
  - creating 108, 137, 139
  - deleting 138, 139
  - reusing 138, 139
  - saving 138
- Cut command 39

**D**

- databases 18
    - backup copies 21, 22
    - checking and repairing 23, 171
    - closing 21
    - combining 24
    - converting 19, 20
    - creating 19
    - definition 18
    - deleting 21
    - file properties 24
    - opening 19
    - organizing 18
    - splitting 23
  - Date Calculator 166
  - dates 43, 46
    - B.C. dates 43
    - dates typed in all numbers 156
    - death dates of stillborn children 43
    - displaying 156
    - displaying in an InfoBox 154
    - estimating 123
    - finding records with similar dates 100, 104, 106
    - guidelines for dates 43, 46, 123
    - importing ordinance dates from an .oup file 125
    - making global changes 162
  - death certificates 71
  - death dates 43
  - decimal numbers for diacritics 31
  - defaults 151
    - file 151, 152, 153
    - folders 151, 157
    - fonts 135, 155
    - formats of names and dates and places 151, 156
    - general 151
    - InfoBox 151, 154
    - multimedia 151, 156
    - names 151, 154
    - parents 41
    - prepared by 151, 154
    - spouse 49
    - templates 151, 158, 159, 160, 161
  - delete 51, 53, 65, 66
    - .paf file 21
    - contact information 97
    - custom events 56, 57
    - custom reports 139
    - individuals 53, 107
    - marriages 53
    - multimedia 70, 93
    - notes 86
    - repositories 65, 80
    - sources 66, 67
    - template 158, 160
  - descendancy charts 130
  - Descendancy List 99, 130, 151
  - descendants 98, 126
    - creating GEDCOM files of descendants 103, 116
    - displaying 26, 151
    - finding 98, 99, 103, 151
    - printing 126, 127, 130
  - Description field of a multimedia object 93
  - diacritics 31, 32
  - diaries and journals 73
  - DICOM (.dic) 90
  - ditto 38
    - Cut and Copy and Paste commands 39
    - information on the Individual screen and Marriage screen 38, 39
    - notes 39, 85
    - sources 62, 63
  - DNS (do not seal) 46
  - DNS/Can 46
  - duplicate records. *See* Match/Merge. 142
- E**
- edit 48, 64
    - contact information 97
    - custom events 56, 162
    - Global Search and Replace 85, 110, 162
    - individuals 48, 107, 164
    - marriages 48, 107, 162
    - multimedia 69, 94, 162
    - notes 84, 85, 162
    - repositories 65, 79
    - sources 64, 65, 67
    - template 158, 159
  - e-mail address 97, 109, 154
  - Emperor dates 43
  - encapsulated postscript (.eps) 90

- end-of-line individuals 132
- endowment of Latter-day Saints 46
  - adding 42, 46
  - displaying Latter-day Saint options 151
  - finding records with similar ordinance information 100, 104, 106
  - lists of incomplete ordinances 132
  - printing 126, 127, 132
  - submitting names for temple work 122, 123, 124
- erase. See delete. 51, 53, 65, 66
- est (estimated) 43
- events (custom). See custom events and attributes. 55
- events (dates). See dates. 43, 46
- events (Latter-day Saint ordinances). See ordinance information. 46
- events (place-names). See place-names. 45
- examples. See case studies and examples. 71, 107, 108, 109, 142, 143
- export 114, 121
  - definition of GEDCOM 114
  - multimedia 92
  - preparing GEDCOM files for TempleReady 121, 122, 123, 124
  - saving reports as files 127
  - sharing GEDCOM files with others 114, 115, 116
  - submitting GEDCOM files to Ancestral File 117, 118, 119
  - submitting GEDCOM files to Pedigree Resource File 118

## F

- families 33
  - adding 36, 37
  - changing the order of children 49
  - changing the order of parents 49, 50
  - changing the order of spouses 49
  - deleting individuals 53, 107
  - removing individuals 51, 53
  - troubleshooting family links 49
- family group records 128
  - printing 126, 127, 128
- family names. See surnames. 43
- family ordinance summary 132
- family records as sources 77
- family reunion contact list 97

- Family View screen 26
  - fonts and preferences 151, 154, 155
  - moving an individual to the primary position 26
  - shortcuts 26
  - switching from Pedigree View 25
  - symbols 25
  - using 25, 26
- FamilySearch Internet Genealogy Service ([www.familysearch.org](http://www.familysearch.org)). See Internet. 140, 170
- fathers 33
  - adding 36, 37
  - adding sealing information 42
  - changing the order of 49, 50
  - editing 48
  - multiple parents 40, 41, 42
  - parent link 42
  - removing from families 51
  - selecting default parents 41
- fax graphic formats 90
- feast days 43
- field filters 104
  - combining field filters 105
  - combining relationship filters and field filters 103
  - defining field filters 104, 105, 106
  - deleting field filters 107
  - examples 107
  - retrieving filters 106
  - saving field filters 106
  - using field filters 104, 105, 106
- fields 43, 45, 46, 71, 104
  - custom events 55, 56
  - date 43, 162
  - Full Name field 43, 162
  - Latter-day Saint ordinances 46, 125, 162
  - name 43, 162
  - on templates 158, 159, 160, 161
  - Phonetic Name and Romanized Name fields 158
  - place 45, 162
  - sources 58, 59, 61, 62, 67
- file properties 24
- files (.oup) 125
- files (.paf). See databases. 18
- files (GEDCOM). See GEDCOM files. 112, 114, 117
- files (multimedia). See multimedia in individual records. 90

filters 103, 104  
 combining field filters 105  
 combining relationship filters and field filters 103  
 defining field filters 104, 105, 106  
 deleting field filters 107  
 examples 107, 108, 109, 110  
 retrieving field filters 106  
 saving field filters 106  
 using field filters 104, 105, 106  
 using relationship filters 103

find and replace. See Global Search and Replace. 85, 162

find records. See search. 98

first names. See given names. 43

focus lists 100  
 creating 100, 105  
 examples of using 107, 108  
 relationship filters 103  
 retrieving and deleting 102  
 saving 102  
 using a focus list 100, 101  
 using field filters 103, 105, 106, 107

fonts 155  
 on reports 135, 155  
 on screens 155

Full Name field 34, 43, 162

## G

GEDCOM files 112, 114, 117  
 creating GEDCOM files for others 114, 115, 116  
 definition of GEDCOM 114  
 importing GEDCOM files 112  
 preparing GEDCOM files for TempleReady 115, 121, 122, 123, 124  
 programs that accept GEDCOM 5.5 114, 115, 116  
 submitting GEDCOM files to Ancestral File or Pedigree Resource File 114, 115, 117, 118, 119

genealogies as sources 77

given names 43  
 Full Name field 34, 43, 162  
 guidelines for names 43  
 slash marks (/) 43, 162

Global Search and Replace 85, 162  
 example 110  
 using 85

glossary 174

Gregorian calendar 43, 166

guidelines 34, 43, 45, 46, 58, 81, 122  
 dates 43, 123  
 Latter-day Saint ordinance information 46  
 names 34, 43  
 notes 81  
 places 45  
 sources 58

## H

help file 16  
 obtaining help about a screen 16  
 obtaining help about an item on a screen 16  
 searching the online help 16, 17

home person 98, 152

hospital names 45

husbands 33, 39  
 adding 36, 37  
 changing the order of 49  
 editing 48, 107  
 multiple spouses 39, 40  
 printing a marriage list 132  
 removing from families 51  
 selecting default spouses 49  
 unknown 34  
 viewing a marriage list 99

## I

icons and cursors as multimedia files 90

Imperial calendar 43

import 112  
 definition of GEDCOM 114  
 importing GEDCOM files 112

indexes 127, 130, 140  
 book indexes 130  
 pedigree index 127  
 web page indexes 140

INDIV2.DAT 20

Individual List 98, 132

individual records 33  
  adding 33, 34, 36, 37  
  calculating the relationship between individuals 165  
  changing surnames to mixed case 164  
  copying information 38  
  deleting from your database 53, 107  
  editing 48, 107, 162  
  event date and places 43, 45, 162  
  finding 98, 99  
  finding the relationships between 165  
  importing 112  
  Latter-day Saint ordinances 46, 121, 122, 123, 124, 126, 127, 151  
  merging 142, 143, 144, 145, 146, 147, 148, 149  
  names 43, 164  
  preference options that affect individual records 35, 151, 154  
  primary individual 26, 27  
  removing from families 51  
  templates 158, 159, 160, 161  
  unknown spouses and parents 34  
  using the Global Search and Replace feature 162

individual summaries 131

Individual View screen 28  
  changing the columns 29, 30  
  fonts and preferences 151, 154, 155  
  how names are sorted 25, 29, 30  
  shortcuts 30  
  using 25, 28, 29

individuals sorted alphabetically list 132

individuals sorted by RIN list 132

inf (infant) 43, 46

InfoBoxes 27, 154

initiatory dates of Latter-day Saints 46

inscribed objects 77

Internet 140, 170  
  creating information to post on the Internet 135, 140, 141  
  Internet sources 77  
  searching for information on the Internet 170

interviews 73

item type of a multimedia file 93

**J**

journal articles 74

journals and diaries 73

JPEG 90

Julian calendar 166

**K**

keyboard 13

Kodak Photo CD 90

**L**

landmarks 45

last names. See surnames. 43

LDS family ordinance summary 132

LDS incomplete ordinance lists 132

LEAD (.cmp) 90

letters (correspondence) 76

link 33, 58  
  individuals into families 36, 37, 39, 40, 41, 42  
  multimedia 68, 92  
  repositories 79  
  sources 58, 61, 62, 68

listing file 171

lists 132  
  creating a custom list of individuals 100, 101, 137, 139  
  custom events 55, 56, 57  
  Descendancy List 99  
  Individual List 98  
  marriages list 132  
  printing 126, 127, 130, 132  
  Source List 66, 67  
  to do list (task list) 82

living people 12, 79

localities. See place-names. 45

lowercase letters 164

lunar calendar 43

**M**

Macintosh graphics 90

magazine articles 74

maiden names 43

marriage certificates 71

marriage record identification numbers 33, 35, 99

marriage records 33  
  adding 33, 35, 36, 37  
  copying information 38  
  deleting from your database 53  
  editing 48, 107  
  finding 98, 99  
  templates 158, 159, 160, 161

marriages list 132

married names 43



Match/Merge 142  
  examples 142, 143  
  identifying duplicate records 132, 142, 144, 148  
  merging records by name 142, 144, 145, 147  
  merging records with the same Ancestral File number (AFN) 142, 144, 145, 148  
  merging records with the same unique record serial numbers 142, 143, 144, 145, 149  
  selecting records to merge yourself 142, 145, 146  
  setting merge options 145  
  sources and repositories 150  
  strategies for using Match/Merge 144  
Merge Duplicate Sources 142, 150  
Merge on AFNs 142, 144, 148  
microfilmed records 74  
middle names. See given names. 43  
MIDI files 90  
mixed case letters 164  
mothers 33, 40  
  adding 36, 37  
  adding sealing information 42  
  changing the order of 49, 50  
  editing 48  
  multiple parents 40, 41, 42  
  parent link 42  
  removing from families 51  
  selecting default parents 41  
movie files 90  
MRINs 33, 35, 99  
multimedia in individual records 90  
  absolute and relative paths 91, 110  
  acceptable formats 90  
  adding 90, 92  
  backup copies 21, 22  
  editing 93, 94  
  managing multimedia files 91, 110  
  obtaining 90  
  preferences 156  
  printing 135  
  removing 93  
  scrapbooks 94  
  sharing 92  
  slideshows 95  
  using the Global Search and Replace feature 162

multimedia in sources 67  
  acceptable formats 90  
  adding 67, 68  
  backup copies 21, 22  
  editing 93, 94  
  managing multimedia files 91  
  obtaining 90  
  preferences 156  
  removing 70  
  sharing 92  
  using the Global Search and Replace feature 162  
multivolume books 72

## N

names of individuals 43  
  calculating a Soundex code 168  
  changing surnames to mixed case 164  
  contact information 97  
  finding records with similar names 100, 104, 106  
  Full Name field 34, 43, 162  
  guidelines for names 43  
  making global changes 162  
  slash marks (/) 43  
names of places. See place-names. 45  
navigation 26, 27, 28, 98  
  Family View screen 25, 26  
  Individual View screen 25, 28, 29, 30  
  Pedigree View screen 25, 27, 28  
  shortcut keys 26, 28, 30  
  switching from one view screen to another 25  
newspapers 74  
nicknames 43  
nomads 45  
Notepad 171, 172, 173  
  finding text and lines 172  
  opening and closing documents 171, 173  
  printing documents 173  
  setting the font 171

- notes 81
  - adding and editing 84
  - converting notes to custom events 82
  - converting sources stored in notes 83
  - copying 39, 85
  - deleting 86
  - find and replace text in notes 85, 162
  - guidelines for notes 81
  - inputting notes that were stored in separate files 83
  - on reports and web pages 81, 155
  - tagged notes 82, 87, 88
- Notes Selector 87
  - changing the list of tags 88, 89
  - turning on and off 87
  - using 87
- O**
- objects as sources 77
- on-line help. See help file. 16
- oral histories 73
- order children 49
- order parents 49, 50
- order spouses 49
- ordinance information
  - making global changes to dates and temple codes 162
- ordinance information 46
  - adding 42, 46, 125
  - displaying Latter-day Saint options 151
  - finding records with similar ordinance information 100, 104, 106
  - importing from an .oup file 125
  - lists of incomplete ordinances 132
  - making global changes to dates and temple codes 162
  - printing 126, 127, 132
  - submitting names for temple work 122, 123, 124
  - the word Submitted in ordinance fields 162
- oup file 125
- P**
- paf file. See databases. 18
- parent links 40, 42
- parents 33, 40
  - adding 36, 37
  - adding sealing information 42
  - changing the order of 49, 50
  - editing 48
  - multiple parents 40, 41, 42
  - parent link 42
  - removing from families 51
  - selecting default parents 41
- passwords 151
- Paste command 39
- paths of multimedia files 110
- pedigree (continental or ahnentafel) 130
- pedigree charts 127, 129
- Pedigree Resource File 117
  - correcting information 119
  - merging records from 148
  - submitting information to Pedigree Resource File 114, 117, 118, 119
- Pedigree View screen 27
  - fonts and preferences 151, 154, 155
  - InfoBoxes 27
  - moving an individual to the primary position 27
  - shortcuts 28
  - switching from Pedigree View 25
  - symbols 25
  - using 25, 27
- Personal Ancestral File 12
  - introduction 12
  - previous versions 20, 82, 83
- Personal Ancestral File Companion 13
- personal knowledge as a source 76
- Phonetic Name field 158
- photos 67, 90, 94, 135
- Photoshop graphics (.psd) 90
- pictures 67, 135
- place-names 45
  - finding records with similar place-names 100, 104, 106
  - guidelines for place-names 45
  - making global changes 162
  - of Latter-day Saint ordinances 46
- places sorted alphabetically list 132
- possible problems list 132
- pre-1970 46

preferences 151  
  File tab 151, 152, 153  
  Folders tab 151, 157  
  Fonts tab 151, 155  
  Formats tab 151, 156  
  General tab 151  
  InfoBox tab 151, 154  
  Multimedia tab 151, 156  
  Names tab 151, 154  
  Prepared by tab 151, 154  
  printing 134, 136, 151  
  Templates tab 151, 158, 159, 160, 161  
preview reports 126  
priesthood ordinations 46  
primary person 26, 27  
print options. See reports (options). 134  
print reports. See reports (printing). 126  
print troubleshooting. See reports (troubleshooting). 126  
privacy 12, 79

**R**

raster images 90  
rearrange 49  
  children 49  
  custom reports 137  
  fields on a template 159  
  multimedia 92  
  parents 49, 50  
  spouses 49  
record identification numbers (RINs) 33, 35, 99  
record serial numbers 33, 115, 116, 142, 143, 149  
Relationship Calculator 165  
relationship filters 103  
  using 103  
relationship indicators 152  
relative paths for multimedia 91, 110  
remove 51, 65  
  contact information 97  
  custom events 56  
  fields from templates 159  
  individuals from families 51  
  multimedia 70  
  repositories 79  
  sources 65  
reorganize. See rearrange. 49  
replace text. See Global Search and Replace. 85, 162

reports (options) 134  
  Latter-day Saint ordinances 126, 151  
  previewing 126  
  printing options 134, 135, 136, 141  
  saving reports as files 127  
  selecting a different printer 134  
reports (printing) 126  
  ancestry charts 126, 129  
  blank forms 126, 127, 128  
  books (ahnentafel and modified register) 126, 130  
  calendars 126, 133  
  custom reports 126, 137, 138, 139  
  descendancy charts 126, 130  
  family group records 126, 128  
  lists 126, 132  
  pedigree charts 126, 127  
  scrapbooks 126, 131  
  wall charts 126, 129, 130  
reports (troubleshooting) 126  
  custom reports 139  
repositories 79  
  adding and editing 65, 79  
  deleting 79, 80  
  keeping track of 58, 79  
  merging 150  
  removing from a source 64, 65  
  using names and addresses of private individuals 79  
rights of privacy 12, 79  
RINs 33, 35, 99  
Romanized Name field 158  
root person 152

**S**

scanned pictures 67, 90  
scrapbooks 94, 131  
  assembling and viewing 92, 94  
  printing 131

- sealing ordinances 46
  - adding 42, 46
  - displaying Latter-day Saint options 151
  - DNS (do not seal) and Cancelled sealings 46
  - finding records with similar ordinance information 100, 104, 106
  - lists of incomplete ordinances 132
  - making global changes to dates and temple codes 162
  - printing 126, 127, 132
  - sealing to parents 42
  - submitting names for temple work 122, 123, 124
- search (see also Advanced Focus/Filter) 98
  - returning to the home person 98
  - searching a list of marriages 99
  - searching by RIN or MRIN 98, 99
  - searching on a list of descendants 98, 99
  - searching on a list of individuals 98
  - searching the Internet 170
- search and replace. See Global Search and Replace. 85, 162
- serial numbers of records 33
- shortcut keys 13, 26, 28, 30
- slash marks (/) 34, 43
- slideshows 95
  - assembling and viewing 92, 95
- sort records 29, 100
  - focus lists 100
  - how the program sorts names 29
  - Individual List 98
  - Individual View screen 28, 29, 30
  - individuals sorted alphabetically list 132
  - individuals sorted by RIN list 132
  - marriages list 132
  - places sorted alphabetically list 132
- sound clips. See multimedia in individual records. 90
- Soundex Calculator 168
- source citations 58
  - adding 58, 61, 62
  - copying 62, 63
  - editing 64, 65
  - guidelines for sources 58
  - how sources are stored 58
  - merging 150
  - printing 132
  - removing from a record 65, 66
  - typing source titles 59
  - using style guides 61
  - using the sources in your .paf file 59
- source descriptions 103
  - adding 58, 61, 62, 67
  - copying 62, 63
  - deleting from a .paf file 66, 67
  - editing 64, 67
  - guidelines for sources 58
  - how sources are stored 58
  - merging 150
  - printing 132
  - removing from a record 65, 66
  - typing source titles 59
  - using style guides 61
  - using the sources in your .paf file 59
- source examples 71
  - articles in magazines and newspapers and journals 74
  - books 71, 72
  - certificates 71
  - compact discs 75
  - correspondence 76
  - family records and genealogies 77
  - inscribed objects 77
  - Internet 77
  - interviews and oral histories 73
  - journals and diaries 73
  - microfilmed records 74
  - personal knowledge 76
- Source List 66
  - printed lists of sources 132
  - using 66, 67
- source multimedia 67
  - adding 67, 68
  - changing 67, 69
  - removing 67, 70

spouses 33, 39  
 adding 36, 37  
 changing the order of 49  
 editing 48, 107  
 multiple spouses 39, 40  
 printing a marriage list 132  
 removing from families 51  
 selecting default spouses 49  
 unknown 34  
 viewing a marriage list 99

squares on the screen 25

stepchildren and step-parents 39, 40, 41, 42

sti (stillborn) 43, 46

Submitted in ordinance fields 162

submitted temple ordinances 162

Sun Raster format image (.ras) 90

surnames 43  
 calculating a Soundex code 168  
 changing surnames to mixed case 164  
 Full Name field 34  
 guidelines for names 43  
 making global changes 162

symbols on the screen 25

**T**

tagged image file format (.tif) 90

tagged notes 82

task list 82

technical support 12

telephone number 97, 154

templates 158  
 active (default) template 160  
 creating and modifying 158, 159, 160  
 deleting 160  
 Phonetic Name and Romanized Name fields  
 158  
 selecting 160, 161

temple codes 46, 125, 162

temple ordinance information. See ordinance information. 46

TempleReady 121  
 estimating information 123  
 importing ordinance dates from and .oup file  
 125  
 information required for temple work 122  
 submitting names for temple work 121, 122,  
 123, 124

The Church of Jesus Christ of Latter-day Saints  
 Ancestral File 117, 118, 119  
 LDS options on screens and reports 136, 151  
 lists of incomplete ordinances 132  
 ordinance information 46  
 Pedigree Resource File 117, 118, 119  
 printing lists of needed ordinances 132  
 printing ordinance information 126, 127  
 submitting names for temple work 121, 122,  
 123, 124

TIFF CITT 90

titles of individuals 43  
 finding records with similar titles 100, 104, 106  
 typing 43

titles of sources 59

to do list 82

triangles on the screen 25

tribes 43, 45

Truvision TARGA (.tga) 90

**U**

Unicode 115

unique record serial numbers 33, 115, 116, 142,  
 143, 149

unknown parents and spouses 34

unlink 51, 65  
 individuals from families 51  
 multimedia 70, 93  
 repositories 79  
 sources 65

unlinked individuals list 132

upgrading to Personal Ancestral File 5.0 20, 82, 83

uppercase letters 164

UTF8 115

**V**

vector images 90

video clips. See multimedia in individual records.  
 90

view screen (Family). See Family View screen. 26

view screen (Individual). See Individual View  
 screen. 28

view screen (Pedigree). See Pedigree View screen.  
 27

**W**

wall charts 129, 130

wave files (.wav) 90

- web pages 140
  - creating 140
  - title of web pages 135, 141
- web sites as sources 77
- Windows metafile 90
- wives 33, 39
  - adding 36, 37
  - changing the order of 49, 50
  - editing 48, 107
  - multiple spouses 39, 40
  - printing a marriage list 132
  - removing from families 51
  - selecting default spouses 49
  - unknown 34
  - viewing a marriage list 99
- WordPerfect graphic files (.wpg) 90
- World Wide Web (WWW). See Internet. 140, 170