

PAF (Personal Ancestral File) Advanced

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PAF is the basic free computer program for organizing family history data. (see *the Basic PAF Skills class* handout.) **PAFCompanion** is the \$7 expanded printing program that adds color and several report styles to basic PAF. (Download at www.familysearch.org, a screen will give you a phone number to call to make payment and get a pin number and unlock the key-number.) **PAFPal** is the \$18 expanded functions program that adds 6 functions to speed up the most tedious of tasks in PAF. (Download at www.Ohanasoftware.com, email will be sent immediately with a username and license key number.) **PAFInsight** is the \$25 expanded advanced functions program that adds IGI searching and enhanced database management functions. (Download at www.Ohanasoftware.com, email will be sent immediately with a username and license key number.)

Basic PAF Skills Review (see *the Basic PAF Skills class handout*.)

- Tip: When working on someone else's computer, save and back-up the info onto a disk, then go to my documents, right click on the file name, and delete to remove the information from the hard drive. At your own computer, either "restore" the info or create a GEDCOM and import it into your prior database.
- Tip: In the Edit Individual screen, to attach a source to a data field, click on the small s to the right of the field and the source screen will appear. If a source is attached to the field a small *s will appear to the right of the field.
- Tip: From any view, to combine duplicate sources; click Tools; Merge Duplicate Sources and Citations.
- Tip: In the Edit Individual screen, use the Notepad, Letter or Camera buttons to attach notes, addresses or picture to this individual. If sources, notes, addresses or pictures are attached to the individual, a small triangle (like a page folded down) appears in the top right of the person's name field in the Family view.
- Tip: From the Family view, to change the order of the children, click Edit; Order Children; highlight the name and move with the mouse; click OK
- Tip: In the Pedigree view, to change generations or move in the pedigree, right click in a name and select Move to Primary.

Tools Match/Merge: To identify and combine into one record, any individuals that may be duplicates. To review the whole file, Tools; Match/Merge; NO to backup; Match (Names the Sound Alike); Merge (all boxes); Advanced (10 Years between births)(all boxes), OK, OK . For each potential match, examine "individual" tab and "marriage" tab to determine if these records are duplicates.

Family History Expo VI

- Tip: Left record is the primary record, information from the right record will be merged only into blank spaces on left record, and balance of right info will be lost unless you click in a box next to data from the right that you want to override data on the left. The left and right can be “switched” if more info is on the right.

When ready, click “merge” and “yes”; then next match.

- Tip: PAFInsight has a much better match/merge program (uses % chance of sameness and allows selected dates, places and names to be merged).

File Export: To share information with others including all or just a portion of your database. Click File: Export: complete the Export to, Include, and Selected Individuals portions of the screen. Then, click the Export button and name the file.

- Tip: If you want to export an individual and all their ancestors or all their descendants only, in Selected Individual, select Partial, click the select button, then click the relationship filter for a dropdown list, make a selection and click Select. In the Ancestors/Descendants screen, answers the questions and click ok.
- Tip: If the GEDCOM file is too big, import the GEDCOM into a new database and back it up (into a zip file) and then email the .zip file. .zip files are a lot smaller, but they can only be opened with the PAF program. GEDCOM's can be imported by any worthwhile family history program.

File Print Reports: To publish reports for sharing information, furthering research or correcting the database. The most used reports are:

| | |
|------------------------------|---|
| Pedigree | List of Duplicate Individuals |
| Family Group | List of Individuals sorted Alphabetically |
| Ancestry | List of Possible Problems |
| Descendants | List of Places sorted Alphabetically |
| List of Unlinked individuals | List of Incomplete Individual Ordinances |
| | List of Incomplete Marriage Ordinances |

- Tip: Always preview the report before printing for content and length. Each report can be altered to include dates or not, places or not, source or not, notes or not, LDS information or not depending on the boxes you check.
- Tip: Scrapbook allows you to make a separate CD with information, notes and pictures. The actual picture or sound is copied onto the CD with the original remaining on your hard drive. All other methods of exporting data only reference the location of the picture or sound and do not send a copy.
- Tip: Use the List of Incomplete Individual Ordinances and the List of Incomplete Marriage Ordinances to search the IGI on-line and update your PAF records manually or use PAFInsight to speed up the process.

Edit Multimedia: To capture picture or sounds and attach them to individual or families for printed reports, on screen display or slide shows. Multimedia will allow you to access photos on your hard drive by typing in the name where the photo is located. Most letters, photos, certificates, etc. are stored in .jpg format as they are much smaller in size than in .bit format although they have a slightly lesser resolution quality.

- Tip: Save photos and sounds in a folder on your computer. Then you can drag & copy the folder to disk or CD to copy all the items in the folder with one command.
- Tip: Name photos, certificates and memorabilia consistently ie. Jones, John (b 1897) dea cert 1942.jpg or Jones, John (b 1897) FamPhoto1926.jpg. All files clearly and uniquely identify who the item is about and what the item is at a glance.

Search Advanced Focus/Filter: To find and/or group individuals for research or other purposes. PAF allows you to save search criteria for use at a later date. Press Control F and then click the advanced button or Click Search, Advanced Focus/Filter.

- Tip: To find all records that don't have a birth or marriage date search for: (Birth date - does not exist) AND Christening date - does not exist) OR Marriage date - does not exist then save the search criteria as "No Date". To retrieve a saved search criteria, Control F, click on advanced, click on define, click on retrieve and highlight which one you want.

Tools Preferences: To change the setup of your PAF to better meet your needs.

- Tip: To change the information displayed on the individual or marriage screens: Tools; Preferences; Templates; Add; (give it a name) then (move things from the left to the right and once they are on the right, drag to get the order you want); OK. Then, (click on it) Make Active. The template is saved onto your hard drive only.
- Tip: To have the same person to come up every time the program is opened; Tools; Preferences; File; (enter the RIN in the use box); OK.
- Tip: To show relationships to a person: Tools: Preferences; File; Change; Search (select the "root person"); Ok; Show Relationships on Status Bar; Ok; Ok.

Tools Global Search and Replace: To change something within the whole file such as a place or spelling correction.

- Tip: To make a global change quickly, click on the individual who has something to be changed globally, darken the field to be changed, then right click and copy the field. Then, Tools, Global Search and Replace, Search and Replace Text in: (select the name of the field to be changed); Search for; (right click and paste into the box); Replace with: (enter the corrected information into the box); Case Sensitive; Create Report; Replace. Review the report listing if anything was changed in error, you can you can go to the RIN and manually change it back. **There is no undo function.**

PAFPal: Replace, Clear (Ancestral File Numbers; All LDS fields, Submitted), **Change** (globally expand or abbreviate US (& England) State places, Add or delete USA), **Reports** (Individuals by date changed, Demographics), **Options** (Bullet for married children without children; picture of spouse and parents on family view), **Songs, Temple Ready** (create report of Updated records)

PAFInsight: Compares your database to the IGI when you highlight a person and click Search. You can then download the info directly into your PAF program.

➤ Tip: To enter your IGI name and IGI password; Tools, Options, Family Search, (enter your information) Note: Save the file before exiting the program or the updated info will be lost.

The search will come up with “hits” and the % chance it is “your” person, and you click on that hit (top half of your screen) and compare the results in 3 scenarios (individual, spouse, family) and then click the boxes on the IGI that you want downloaded and Update.

➤ Tip: You can “search” up to 250 at a time (it searches one at a time and holds the others in a “waiting cue” to start the search immediately. You can examine any hit as a search is continuing (and update). This is the only program that does your genealogy at night when you are sleeping.

How to Clean up a Database: (for any software program, functions for PAF listed.)

- Rename and save a copy of the in case you make a mistake and need the old file
- Change all previously entered data to mixed case (PAF-Tools; Mixed Case)
- Change the displaying and printing of names to surname all caps (PAF-Tools; Preferences; Names: Capitalize Surnames on Screens and Reports)
- Convert all state initials to full words (PAFPal-Clear/Change; Expand)
- Delete all “USA” in locations (PAFPal-Clear/Change, Delete USA)
- Convert all locations to full words and combine duplicates. i.e. Oh. to Ohio, Penn to Pennsylvania, etc. (PAFInsight-Edit Places, either type the change or drag and drop the wrong one into a better one)
- Delete all individuals named Living (PAF-Search, Advanced Focus, Advanced, Define, Name, contains Living; AND Name, does not contain “Livingston”; click on Search; OK; Show results; (look at the results, there is no undo function, if ok then click on Delete)
- Remove the date and place terms “unknown” and “private” (PAF-Tools, Global Search and Replace, search for “unknown” and replace with (blank), click OK then search for “private” and replace with (blank), click OK).
- Consolidate all duplicate individuals (PAFInsight-Match/Merge, Down to 50%).
- Review the Possible Problems report (PAF-File; Print reports; Lists; Possible Problems; Preview)
- Run a database check /repair (PAF-File; Check/Repair)