GenSmarts

Simplifying Family History Research

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GenSmarts

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Part I

1 Introduction

1.1 Welcome To GenSmarts!

If you haven't tried using GenSmarts yet.... **STOP!** This software is designed to be easy to use, provide help as you use it, and to encourage learning by trial and error. It was not designed to require reading a 40+ page document first, nor was this 40+ page document designed to be your first introduction to GenSmarts. The software's most commonly used functions are easy to access, and the more advanced ones are a bit more hidden away so as not to confuse the first time user. Try using it a bit first, then come back and have a look at this manual/help document. Use the CONFUSED button in the upper right hand corner of the GenSmarts window - it answers the 10 or so most frequently asked questions first time users have.

GenSmarts Background and Purpose

Most genealogy software is focused on helping you document what you know about your family. Unfortunately, that's just the tip of the iceberg... there's so much more that you don't know, of course. Aside from search engines and a couple of sites that help you find links between your family and others... there's not much out there that helps you do the legwork.

GenSmarts uses a kind of artificial intelligence that we call "smart objects" - that's where we take the name GenSmarts from. By bringing some virtual life into your existing family history knowledge, and letting it interact with the "smart objects" we created to represent the various historical records and research locations... we create the magic that we call GenSmarts.

Context is worth 100 IQ points - that's the big idea with GenSmarts. There are lots of places where you can read about the types of things you need to do to research your family. Lots of other places you can go to find out where different types of records are available for your searching. But there's nothing that puts this in the context of YOUR ancestors - until now. GenSmarts - learning by example is so much more effective (and fun).

1.2 How GenSmarts Works

GenSmarts works against a database of known records, such as censuses, vital records, land and property records, and military records. By analyzing the people, events, dates, and places you've collected in your genealogy file and applying a set of rules about when a specific person is likely to exist in one of these record sets, GenSmarts can produce research suggestions for you. This gets even more exciting when the suggestion is for records available online, and then GenSmarts can take you directly to the site for an immediate search. And that's not all... by applying some further logic GenSmarts can highlight/prioritize those suggestions which are likely to fill a gap in your data - a missing place of birth, for example.

1.3 FAQ

Listed below are the questions we're asked most often by prospective customers. Be sure to check out the support page on our website, which contains the most current support items we've been getting questions about.

What's unique about GenSmarts?

GenSmarts is all about helping you uncover your family history (traditional genealogy software is focused on providing you tools to document what you discover). When you use GenSmarts, you do

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very little typing - you're reviewing GenSmarts suggestions and a simple mouse click will engage GenSmarts to perform lookups for you and present results. GenSmarts doesn't replace your traditional genealogy software (e.g. PAF, Family Tree Maker, etc.), but works alongside it by reading and analyzing the data you've already collected.
What does GenSmarts do?

GenSmarts develops a profile of your ancestors based on where and when they lived. This profile is then matched with GenSmarts inventory of known records to make predictions about the record trail your ancestors may have left behind. These predictions are then prioritized to highlight data that you're missing. The logic behind each suggestion is fully explained. For suggestions that can be researched online, at your direction, GenSmarts will navigate your internet browser for you, typing in your ancestors name and even pressing the SEARCH button for you!

Is there a subscription involved to use GenSmarts?

No, it's traditional software pricing - you pay once to buy the software, and then use it for as long as you like with no additional costs.

Do I have to be online to use GenSmarts?

No, GenSmarts works fine if you're not connected. Obviously if you want GenSmarts to navigate your internet browser for you, you'll need to be online for that feature.

Do I have to subscribe to Ancestry.com or other pay sites to make use of GenSmarts?

Absolutely not. GenSmarts has many more free sites in its inventory than pay sites. You can configure GenSmarts to know what you have access to (the default is free sites only) and what you don't, then each is clearly marked red or green to indicate your ability to access them. If you don't want to see any suggestions you can't access, you can simply turn on a filter so they're not displayed. Many users who don't subscribe to pay sites use GenSmarts to print lists of things they want from pay sites, and then do their research at a local library or Family History Center where they have access.

Are updates free?

Yes, all updates to the version you purchase are free. So if you purchase Version 1.0 and we came out with Version 1.5, that would be a free upgrade. We reserve the right to charge a nominal upgrade fee for major version upgrades. For example, there may be a small charge to go from Version 1.5 to Version 2.0. We have no plans to require upgrades - if, for example, you have Version 1.5 and decide not to upgrade to Version 2.0, that's ok - we still plan on supporting older versions. It's also our plan to share our records inventory across versions, so older versions will continue to expand their coverage and make additional suggestions.

What countries does GenSmarts support?

GenSmarts comes with a known records inventory that supports research for the USA, Canada, and the UK. There is also a little content for Australia. You can add your own known records inventory definitions for any country.

What genealogy software does GenSmarts work with?

- Family Tree Maker (including FTM 2006)
- PAF 5
- The Master Genealogist (4,5, & 6)
- RootsMagic (1, 2, & 3)
- Legacy (4,5 & 6)
- Ancestral Quest (11 & 12)
- Ancestry Family Tree

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- Brother's Keeper (Version 6)
- Family Trees Quick and Easy (open as an Ancestral Quest file)
- Heritage Family Tree Deluxe (open as an Ancestral Quest file)
- Gedcom

Can I buy just one copy and install it on both my laptop, my desktop? How about installing a copy at my vacation home?

Yes. The license allows you to use the software on any number of computers. It doesn't allow others to use it on those computers, however, so the computers you install it on would need to be under your control. Family members living in the same house as you are also allowed to use your GenSmarts.

Is it easy to use?

The basic features of GenSmarts are very easy to use - simply click on a suggestion, read the analysis on the idea that GenSmarts presents to you, and, if the suggestion is available online, simply click to have GenSmarts perform the record lookup for you.

Do I have to convert or migrate my data to use GenSmarts?

No, GenSmarts reads all the popular genealogy software file formats directly.

If I discover something with GenSmarts, how do I change my data?

GenSmarts doesn't change the way you record what you find - you use PAF, Family Tree Maker, etc. to record your discoveries. GenSmarts will factor your new information in the next time you run it.

Are there any privacy issues with GenSmarts?

Your data never leaves your PC, so there are not privacy issues with GenSmarts. None of your data is uploaded to the internet.

What version of windows does GenSmarts require?

GenSmarts will work on all versions of Windows - 95 through Vista.

How big or fast a computer does GenSmarts require?

The requirements for GenSmarts are pretty low - 130Mhz or better Pentium II, 32MB or more of memory, and free hard disk space of at least 50mb. More physical memory would be needed for larger files (say 10,000 or more people).

Will GenSmarts work on my Mac?

Not officially... We designed it for Windows and that's what we provide support for. Customers have report to us success with the intel based Mac, using either Parallels or Boot Camp. VirtualPC's windows emulation of 2000 and XP is also not sufficient to run GenSmarts, though some customers have reported success when using Virtual PC to emulate Windows 98.

Is there a manual?

You're looking at it... :-) So yes, though most people have told us they prefer the video demo and video faq. The manual is in electronic format, although it's easily printed. You'll find it on your CD or you can download it here.

Is GenSmarts easy to install and uninstall?

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Yes, it's a very simple process and there are no modifications to Windows system files.

What's the difference between the trial version and the paid version?

The trial version is missing a few key features (things like printing), supports only a few "uses" of the AVAILABLE ONLINE button, withholds about 15% of the most interesting suggestions, contains a much smaller inventory of known records and is typically a couple of versions out of date. It may or may not have an expiration date... see the splash screen that comes up every time you run it for the most accurate information on limitations.

What data from my file does GenSmarts use?

Aside from the obvious name and family relationship info, GenSmarts looks at a variety of events, including birth, death, census, and marriage events of an individual.

Does GenSmarts recommend things I've already recorded?

While it's easy to determine a suggestion that would result in data you don't have... it's hard to be certain from the data in your file if you've already recorded from a source we're suggesting. When in doubt, GenSmarts tends to provide you with the idea anyway so you can filter it in our out as you like. Any "duplicates" however, will be "lower priority" suggestions since they won't be supplying any "missing information" in your file. The "fills missing data" or "provides source" filters are useful for screening suggestions that may be duplicative of what you already have.

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Part II

2 Tutorial

2.1 Tutorial Overview

Here's some tips on how to use GenSmarts.

GenSmarts works it's magic by analyzing the genealogy information you've previously recorded using software such as Family Tree Maker, Legacy Family Tree, or most other software packages that can export a GEDCOM file. Click here if you don't have your genealogy recorded on your computer yet.

I've heard there's a lot of things you can learn about your family history on the internet. How do I get started?

There's a new internet site I heard about recently. Do they have records on any of my family?

I'm taking a trip, and want to do a bit of genealogy while I'm there. How can I tell what records I should be checking while I'm there?

2.2 Surfing With GenSmarts

GenSmarts is a great way to surf the internet for online records pertaining to your family. Rather than trying to remember who you should be looking for and trying to keep tabs on all the online sites out there... let GenSmarts do the work!

1. Make sure you've set up Direct Ancestors for your file. This will move the suggestions you likely care most about to the top of your To Do list.

2. If you subscribe to a pay service such as Ancestry.COM already, you'll want to click on the AVAILABLE ONLINE filter option, on The To Do List Tab. This will display only those suggestions which can be researched online.

3. On the other hand... if you're not a paid subscriber click on the AVAIL. FREE ONLINE filter option, on The To Do List Tab. This will display only those suggestions which can be freely researched on the internet.

4. Simply double click on any item in the To Do list to launch a browser to the online site, or click the AVAILABLE ONLINE button. If you subscribe to a pay service, such as Ancestry.COM, the first time you select a suggestion you'll need to click the "I'M A SUBSCRIBER" check box to let GenSmarts know to take you directly to the pay site.

2.3 Checking Site Contents With GenSmarts

Let's say a new internet pay service is announced, such as Ancestry.COM, or even a major new set of records is added to a site like the 1880 census at www.FamilySearch.org. Is it worth your time or money to investigate? You can use GenSmarts to find out!

1. As new online sources become available we try to keep GenSmarts updated. That's why it's important not to disable the update check when you start GenSmarts. You'll want to know if there are new sources out there. Browse through those comments we give you about new record updates. See anything interesting? Proceed...

2. Select the "Suggestions for a specific library or website..." suggestion filter wizard/template and from the drop down list located immediatly above the To Do List. Use the wizard to select the website you are interested in. Press OK and you'll be returned to the To Do List showing only

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items from that library or website.

3. Now that you're displaying only those suggestions that have been generated for the new/updated site, you may want to further focus the list so only the new portion is displayed. The Advanced View from the top line menu (VIEW... ADVANCED...) has a <= SEARCH box that allows keyword searching on the suggestion titles - switch to that view if you're not already using it. For example, if it were the 1880 census at www.FamilySearch.com you were interested in, type 1880 in the To Do List <= SEARCH box. That will shorten the To Do List to just those suggestions for the 1880 census available at www.FamilySearch.org!

4. You can stay even more up to date by joining our forum at www.gensmarts.com/forum, where we solicit ideas and share information about genealogy records available online.

2.4 Planning For A Trip

Taking a trip and wanting to work in a little genealogy on the side? Use GenSmarts to figure out what and where to check while you're there.

1. Using the Research Locations Tab, review the list of facilities defined to GenSmarts. Any of them near where you're going?

2. For those that are near where you're going, look in the "AVAILABLE FOR RESEARCH AT THE FACILITIES SELECTED ABOVE" list. Are there any suggested research items there? If so, make a note of this research facility, we'll need to remember it in the next step below.

3. Switch over to the To Do List Tab. Select the "Suggestions for a specific library or website..." suggestion filter wizard/template from the drop down list located immediatly above the To Do List. Use the wizard to select the library you are interest in. Then press OK and you'll be returned to the To Do List showing only items from that library or website.

4. Your To Do list is now displaying only the suggestions GenSmarts has for you that can be done at these locations. Review them using the EXPLANATION below, and mark the RESEARCH STATUS of the ones you think are worth following up on with the MARK AS... PLAN TO SEARCH button.

5. Now let's print a report to take with us on our trip. Select PRINT...TO DO LIST... from the Menu Bar.

6. In the Print To Do List window select
   - Which To Do's do you want to print? **Only those marked "Plan To Search"**
   - How much detail do you want to print? **Research Pack**
   - Which location? **Choose the library you want** (some suggestions may be available at multiple libraries)
   - How do you want the information sorted? **By Surname**

7. Now you've got a nice list of things to research on your trip, a place to take notes about what you find, and key background information about the people involved to help you in your search. Have a nice trip!

2.5 Don't Have Your Genealogy On Your Computer Yet?

Come on... you're missing all the fun! And your grand-children will thank you years from now, because it really does get harder once previous generations are no longer around to tell their stories.

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There are several good genealogy software programs around you can use. Most are free to download and try, with only a nominal cost ($25-$50) to buy. Download one and get started today!

You'll find a complete list of software that works well with GenSmarts on our website, at

http://www.GenSmarts.com/GenSmartsCompGenealogySoftware.asp

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Part III

3 The Main GenSmarts Interface

3.1 Main Interface Overview

The main GenSmarts interface is divided into 5 elements:

The Menu Bar, which provides access to primary functions, open, exit, print, etc. To access these, simply click on the word.

Four tabs, representing four different perspectives on your data are:
- The My Genealogy File Tab, which lists the people in your file
- The To Do List Tab, which lists the research suggestions GenSmarts has for you. This is the default tab when you open GenSmarts.
- The Research Locations Tab, which shows those suggestions by location
- The Data Cleanup Tab, which provides information on how GenSmarts is interpreting your place names

To access any of these tabs, simply click on the tab title.

To close or exit GenSmarts, you can simply press the X in the very upper right hand corner of the main window, or, alternatively, use The Menu Bar, and the File...Exit... function.

3.2 The Menu Bar

The Menu Bar provides access to the "primary" GenSmarts functions:

File
- Refresh/Reopen, picks up changes made to your file made since you opened it with GenSmarts
- Open..., a standard file open dialog, that lets you find your genealogy file
- File Open Wizard... , walks you through the process of finding your genealogy file
- Print People... , several ways of printing some or all of the individuals in your file
- Print To Do List..., several ways of printing some or all the suggestions GenSmarts has generated for you
- Exit, closes GenSmarts
- Recent Files, the last five files you've loaded are listed for your convenience. Simply click on one to reload it.

Print/Export
- People..., several ways of printing some or all of the individuals in your file
- To Do List..., several ways of printing some or all the suggestions GenSmarts has generated for you
- Call Numbers..., several ways of printing the library call numbers associated with GenSmarts suggestions
- Data Cleanup Place Name Issues..., several ways of printing issues GenSmarts found in interpretting your genealogy data

Tools
- Settings..., settings that control the way GenSmarts works, see Settings Dialog help for more information
- Customize Geography..., allows you to define places that GenSmarts doesn't recognize or support by default
- Customize Records..., allows you to define your own rules for generating suggestions
- Analyze Only Part Of A File..., allows you to only get suggestions for some of the people in your file
- Export Placenames..., a quick way to create a file containing all the place names GenSmarts sees in your file

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- Test Windows Default Browser..., a quick way to check the integrity of your windows browser setup
- Windows Component Checker..., runs a few quick data access tests to identify which types of files your PC can access. Not supported in the GenSmarts for MyFamily.com edition.
- Go to individual..., swaps you to your genealogy record keeping software (if running), storing id information in the clipboard
- Edit GenSmarts.ini..., useful for support purposes only and not something you want to tinker with unless instructed to by GenSmarts support

View

- Normal..., the best setting for beginners
- Advanced..., best for experienced or power users - a more crowded display, but adds a search box that can be very powerful in filtering suggestions
- Classic..., not recommended, but provided for those that have grown used to the way GenSmarts Version 1 worked
- Minimal..., useful when you've got the display filtered to a list of suggestions and you want to maximize the screen space for the list and explanation
- Text Size..., similar to the same feature on your internet browser, it allows you to adjust the text size on key parts of GenSmarts
- Enable V2 Features..., useful for support or demonstartion purposes, to show the difference between GenSmarts Version 1 and Version 2

Help

- GenSmarts Help, you're here :-)
- Frequently Asked Questions, this displays several common questions, with internet links to the answers
- The Welcome Wizard - Settings And Introduction, this is the wizard dialog you likely were shown the first time you ran GenSmarts. You can run it again at any time.
- Support Newsletter (tips & updates), this allows you to get on our list for notification of free updates
- GenSmarts Training, this links you to our training website
- File Open Tips, this takes you to a page on our website where we keep the latest tips to help you find and load your genealogy file. Not supported in the GenSmarts for MyFamily.com edition.
- Buy GenSmarts, in the trial version, this takes you to the purchase page on our website - http://www.GenSmarts.com/buy.asp
- Enter Your Registration Key, in the registered version, this is where you can enter your permanent key, enabling all GenSmarts features. Not supported in the GenSmarts for MyFamily.com edition. If you find this option "grayed out" it means you're running the trial version of GenSmarts. The registered version of GenSmarts is a different download/install.
- Report A Bug, generates an email to our support desk - support@GenSmarts.com
- Request A Feature, also generates an email to our support desk - support@GenSmarts.com
- GenSmarts Home Page, launches a browser to our website - http://www.GenSmarts.com
- eMail Your File To GenSmarts Support, generates an email, attaching a compressed copy of your genealogy file. Useful if we need to help you with something specific about your file. Only supported for "single file" file types.
- About GenSmarts, a simple window with our contact information, as well as some statistics and version numbers

3.3 The My Genealogy Tab

The purpose of this tab is to provide you with a reference of everyone in your genealogy file. This is useful for quick checks on key facts when planning research. The elements of this window are:

- **File Facts**

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Shows you basic information about the physical file loaded, it's name, size, and date of last change.

- **Data Facts**

Shows you basic information about the genealogy information contained in the file you've loaded. On some files, GenSmarts initially estimates this information, then updates it with actuals when you've successfully loaded the file. For larger files, more than several megabytes, GenSmarts doesn't bother to count and display the most popular surnames in the file, as this takes extra time, and is more of a curiosity anyway.

- **People**

This is a listing of all people in your file, focused on those containing the phrase you've typed into the "<= Search" box. You can select a person to see additional details in the People Facts section of this tab. You can select multiple people, either individually by holding down the control key while you select each additional person. You can select a range of people by first selecting the person at the top of the range, then select the person at the bottom of the range while holding down the shift key. The Print People... function has an option for printing only those people selected, which is useful.

You can use the email/Copy button to quickly generate an email or copy to the clipboard a brief narrative of the people selected.

Selecting a person on this list, does not automatically select the same person on the To Do List tab, so you can move back and forth between the two tabs without losing your place in either list.

On Windows 95/98/ME there is a limitation of the size of this list - it can not contain more than 32,000 people. This isn't as bad as it sounds, however, as the search function works against the whole list, and you're not likely to want to scroll around on a list that large anyway.

- **Direct Ancestor Tag**

See the help topic, About Direct Ancestors, for more information about these buttons.

- **People Facts**

This contains a descriptive GenSmarts paragraph about the person selected in the People section of this tab, their immediate relatives, and the key events that have been picked up from your file.

3.4 The To Do List Tab

The purpose of this tab is to provide you with suggestions on how to learn more about the people in your genealogy file. The elements of this window are:

- **Confused? Click here for help... BUTTON**

See the help topic on Frequent Asked Questions for more information. You can also make this button go away in the settings dialog.

- **Research To Do List**

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This is a listing of all the research ideas GenSmarts has come up with, based on known records relating to the people, events, places, and dates in your file. We call it a "To Do" list because we like to think of it as a list of things to look into, checking them off as we go, so we don't duplicate our research efforts.

To find suggestions of paticular interest, use the suggestion filter drop down list that is located immediately above the To Do List.

Suggestions that appear to provide additional information ("Fills Missing Data") beyond what you've already specified in your file are given priority in the list and marked with a "smiley face". Suggestions that are not marked in this way, may not provide any additional information and can be filtered out of the display - see the section on Filtering below. Suggestions where GenSmarts believes you'll get an additional source are marked with the "four little diamonds" symbol.

The color symbols at the beginning of each suggestion provide a quick reference icon to the attributes of the suggestion. The legend on the right side of the screen contains these symbols along with their names. You can select a suggestion to see additional details in the Explanation section of this tab. You can select multiple suggestions, either individually by holding down the control key while you select each additional suggestion.

In the Advanced View (top line menu - VIEW... ADVANCED...) you can use a "<= Search" box to view just those suggestions that contain the phrase you type in the search box.

You can select a range of suggestions by first selecting the suggestion at the top of the range, then select the suggestion at the bottom of the range while holding down the shift key. The Print To Do... function has an option for printing only those people selected, which is where these multiple selections are useful.

Chances are you've already looked into some of these ideas, either with results or not, so there's a way to indicate, focused on those containing the phrase you've typed into the "<= Search" box. You can select a person to see additional details in the People Facts section of this tab. You can select multiple people, either individually by holding down the control key while you select each additional person. You can select a range of people by first selecting the person at the top of the range, then select the person at the bottom of the range while holding down the shift key. The Print People... function has an option for printing only those people selected, which is useful.

- **Sort To Do By...**

This sorts the list so that it is displayed by as follows:

Clicking on **Research Priority** , the default, sorts the list on a combination of factors, including:
- does this suggestion fill a "hole" in your data (i.e. fills missing data)
- is this person marked as a direct ancestor
- does the set of records being suggested include most of the population (i.e. a better chance that your ancestor can be found)

Clicking on **Surname** sorts by surname of the person targeted by the suggestion.

Clicking on **Date** sorts by date of the record targeted by the suggestion, most recent date is first.

- **Update Research Status**

You can mark your plans and results for these suggestions as follows:

Clicking **Found**, indicates that you've researched this suggestion with a positive result. Useful if you

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want to print an inventory of your records, or filter these so they don't show up in the list.

Clicking **Not Found**, indicates that you've researched this suggestion with a negative result. Useful if you want to keep track of what you've searched before so you don't search it again. And also this allows you to filter the list so these things are not displayed.

Clicking **Plan To Search**, indicates that you've selected this suggestion for future follow up. Useful when you want to print your to do list - you just print those things you've decided to work on. And also this allows you to filter the list so these things are not displayed.

Clicking **No Status**, removes any status, meaning you're undecided as to what to do with this suggestion. Useful mostly for being able to filter so that only suggestions you haven't dealt with are displayed.

Additionally, you can define your own custom marks, and they will appear as buttons as well.

The COMMENT input box allows you to enter a brief comment that will appear back in the box whenever you select this suggestions. Using Advanced Filtering, you can also select suggestions based on the contents of the comments you enter.

Whenever a comment or mark is placed on a suggestion, that date of that comment/mark is also recorded. This is displayed in the upper right hand corner of the Update Research Status area. As with the COMMENT input box, you can use Advanced Filtering, to select suggestions based on that date.

- **Research Link**

Provides a link to the online source for this record. If it's a site GenSmarts has been able to integrate with, we'll go ahead and populate the search page for you so you can get right to the results. Please be aware that there are often many search options, such as Soundex and wildcards that you may wish to explore if you don't get the results you're looking for right away - typically these online record sites provide a "refine search" or "back to search page" option you can use to explore this with.

Pressing the small down arrow on the right edge of the button produces a drop down menu which allows you to control how the link to the site is executed. BROWSE will launch the browser you've specified in the TOOLS...SETTINGS... menu option. Depending on the site, search criteria may or may not be applied and submitted. SMARTLINK, launches MS Internet Explorer and fills in the search criteria for you to review/tailor/submit. SMARTSEARCH is identical to SMARTLINK and additionally, the search is submitted for processing. By default, when you press the AVAILABLE ONLINE button, a SMARTLINK is performed. You can change this default to be either BROWSE or SMARTSEARCH, if you prefer, by using the TOOLS...SETTINGS... menu option (INTEGRATION tab).

For pay sites, often there are free trial periods that can be arranged, which is a very good deal with GenSmarts, since you can be very productive in your use of these sites in a limited amount of time. To help our customers stay informed on these deals, the AVAILABLE ONLINE button changes to say FREE TRIAL OFFERS! you've selected a suggestion that's available on a pay site. Clicking on this FREE TRIAL OFFERS! button takes you to a page on the GenSmarts website where we track the offers. If you're already a subscriber, use the TOOLS...SETTINGS... menu option, SUBSCRIPTIONS tab to specify your subscriptions.

Clicking on **Research Priority** , the default, sorts the list on a combination of factors, including:
- does this suggestion fill a "hole" in your data (e.g. fills missing data)
- is this person marked as a direct ancestor
- is the set of records being suggested include most of the population (e.g. a better chance that your ancestor can be found)

Clicking on **Last Name** sorts by surname of the person targeted by the suggestion.

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- **Explanation**

This contains a description from GenSmarts about the suggestion you've selected. The description will vary considerably as it's unique to the specifics of the person, suggestion, record types, and record locations involved. It includes details such as:

- GenSmarts rationale for why researching this record makes sense
- A special NOTE if it appears this suggestion will contribute new information to your data
- The specific rationale for GenSmarts estimating, if and of the dates or places directly involved in this explanation were estimated by GenSmarts
- Some general background on the person involved, for quick reference
- Specific information on the person involved that would help during the search of this record
- Some general information about the record set involved, for background
- Which research locations have these records
- Call numbers and microfilm/microfiche numbers of the records involved

See the topic About Copy for information on how to copy parts of the explanation to other applications.

3.5 The Research Locations Tab

The purpose of this tab is to show you the inventory of the research locations GenSmarts has defined to it, as well as the suggestions that pertain to those facilities.

- **Research Facilities**

This is a listing of all research locations currently defined to GenSmarts. The list can be focused on just those facility names containing the phrase you've typed into the "<= Search" box. You can select a facility to see additional details in the Facility Facts section of this tab, as well as a complete listing of all the suggestions pertaining to records available at this facility. You can not select multiple facilities at the same time.

- **Facility Facts**

For physical facilities (e.g. not websites), this shows the facilities address, as well as provides an online link to the homepage of this facility.

- **Available For Research At The Facility Selected Above**

This is a listing of all the research ideas GenSmarts has come up with that can be found at the facility selected above. When a suggestion is selected, any facility specific information about this suggestion, such as a call number or microfilm roll number, is displayed in the Research Comments section. You can use the "<= Search" box to focus the list on just those suggestions that contain the phrase you type in the search box.

- **Research Comments**

Contains facility specific information, if any exists, for the selected research suggestion.

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3.6 The Query Tab

The Query tab allows you to generate suggestions that are not based on any file data. This is helpful if you don't have an ancestor in a file that's currently available, you simply don't want to take the time to load your file, or you want to try some place names or dates that differ from your file.

The resulting suggestions are displayed in a subsequent window when you hit the Generate Suggestions button. These suggestions are independent of your To Do List tab, and are not retained after the window containing them is closed.

Use the Clear button if you'd like to reset all the fields to their default values (blanks in most cases).

You can also get to the query tab by double clicking on a person in your My Genealogy File tab. In this case the query data will be defaulted for you to the data from your file. Any changes you make to this data will affect this query only, and will not change your file or the data used from your file in other parts of GenSmarts.

3.7 The Data Cleanup Tab

There are two different types of data cleanup:

1) Place Names, which lets you review how GenSmarts is interpreting the place names in your file, and...

2) Save Issues, which displays any issues GenSmarts has in loading your direct ancestor settings or in loading your saved research results.

3) Estimating, which displays any issues that arose as GenSmarts estimated any missing dates and places in your file.

3.8 About Place Names

In order to produce recommendations for you , GenSmarts must interpret the place names you've recorded in your genealogy file. While GenSmarts can understand a wide variety of formats for place names, there can be ambiguities. For example, when you use the phrase "CO", is it an abbreviation for COUNTY or COLORADO?

This tab contains a list of place names where you may want to check GenSmarts interpretation. In some cases, GenSmarts has been able to figure out location specifics, but only by making assumptions you may wish to investigate. An example of this would be to a place name like "Clark, IN" where GenSmarts has interpreted this to mean "Clark, Lake County, Indiana, USA". There's also a Clark County, Indiana, so perhaps that's what you meant instead.

In other cases, GenSmarts just couldn't come up with anything from your place name. Examples, might be "Springfield" - with just what appears to be a city specified, GenSmarts won't try and figure out the state or country. Another example might be something like "Jackson, Misisipqi" - GenSmarts doesn't recognize the state with it being misspelled too badly. Yet another example would be "Nashville, Tennes." - GenSmarts recognizes standard abbreviations for the geographic division below the country level (e.g. a state or county), but not non-standard abbreviations.

The list of recognition issues is catagorized by types, with each type of issue being represented by a letter:

A) GenSmarts was unable to obtain any geographical information

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B) GenSmarts was only able to use a portion of the geographical information present
C) GenSmarts noted that, though you likely know the place, you haven't recorded it yet
D) GenSmarts was able to supply some additional geographic information for you, based on the city
E) GenSmarts was able to supply some additional geographic information for you, based on the county or state
F) GenSmarts estimated a place that was missing from your data

You can have the data cleanup list remember place names you've investigated and found to be ok, by using the exclude function. See the topic on excluding place names for more information.

For items where you know the place name is correct, you may wish to add the place to GenSmarts known geography, using the Customize Geography Form.

In the GenSmarts interpretation display, different geographic divisions are shown as follows:

- Country
- Div1 - the level of division below country (e.g. in the USA this would be a state, in England, it would be a county)
- Div2 - the level of divsion below Div1 (e.g. in the USA this would be a county)
- Locl - any further locality information from your file (city and any additional information imported)

The **<= Find Next button** allows you to skip ahead in the list to the next item that contains the specified text as part of that items Explanation. The search begins at the item currently selected, and will wrap around to the beginning of the list if nothing is found.

Most genealogy hobbyists don't have a way of enforcing standards for the place names they use. To further make things challenging, often times it's convenient to only record part of the place name, such as just the city, when it's obvious to you, given the context, what specific city you're referring to. Given these complications, and the fact that there are a number of place names for every individual in your file... the number of non-specific place names in your file can sometimes be daunting. Look on the positive side - it's likely that GenSmarts is understanding enough about your place names to come up with some great recommendations for you without your ever anticipating a piece of software was going to try and interpret what you typed in at the end of a long day of visiting court houses across three counties. :-)

To help you help GenSmarts understand your place names, the list in Data Cleanup is prioritized so that the items you'll likely benefit the most from (e.g. get more or better suggestions) are placed in the top of the list, and marked with an A priority. Click on a row to get an explanation as to why it might need attention, and to find out the individual and event associated with this place name. Use your family tree software to correct these ambiguities as you're motivated.

A good format for recording a place name, using Chicago as an example, is... Chicago, Cook, Illinois United States. The country name (United States in this case) is optional - GenSmarts allows a default country to be specified so it doesn't have to be specified on each place name.

GenSmarts has some capabilities to translate shorthand or abbreviations you may have used in specifying your place names. See this topic for more information.

You can inspect and extend the place names GenSmarts understands using the Customize Geography Form.

3.9 About Save Issues

When you tag a person in your file as a direct ancestor, or when you mark a research result, GenSmarts saves key information about the individual involved, so the tag/mark can be redisplayed the next time you load your file. If this key information changes in your file, however, GenSmarts may have a problem trying to match the tag/mark.

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The key information saved is the name of the person, the birth date and place, and the death date and place. If the name and one of the birth date/place or the death date/place matches, then GenSmarts will not display any issue. If the name matches, but neither the birth date/place nor the death date/place matches then GenSmarts will warn you. GenSmarts will also display an issue if the name doesn't match.

The Save Issues tab within the Data Cleanup tab lets you review and correct any of these type of issues. You can also delete the offending mark/tag if you like.

When GenSmarts isn't able to match a direct ancestor root, or research result, the tag or mark continues to be saved, but simply won't be displayed when a match isn't made.

You will likely always have issues if you work with multiple files, as people in one file won't exist in the other. If this is your normal practice, you'll want to turn off the warning. To turn off the warning, see the "Ignore Save Issues Warnings"setting in TOOLS...SETTINGS...DISPLAY or simply check the "don't warn" checkbox when the warning is displayed. In this case, you can occasionally review the Save Issues tab for potential problems.

What happens when you've marked a suggestion (Found, Not Found, etc), and, due to changes in your data (dates and/or places), or changes we've made in the rules governing suggestions... the suggestion doesn't seem like a good idea anymore? GenSmarts will continue to carry it in your To Do list, though with a comment that notes it's obsolete. It will also appear in the Save Issues list. To get rid of this, simply Clear the mark you've attached to it, or use the Delete This Mark/Tag button in Data Cleanup.

3.10 About Estimating

GenSmarts uses a "jury" algorithm to estimate any missing birth, marriage, or death events in your file. What this means is that other events in a person's life that have established dates, reason with each other to reach a consensus estimate for the missing date. If the established dates become deadlocked, it's a sign that some of the dates for events in this person's life are likely illogical. Any illogical conditions are logged in the DATA CLEANUP tab, ESTIMATING sub-tab, for your review.

There are two types of conditions that show up in the list:

Illogical conditions encountered during estimating, as described above

Possible living person, not marked as living (if your file format supports this mark)

To help you understand the illogical situations that might be encountered, here's a set of constraints GenSmarts uses to identify them:

- Mother between the ages of 15 and 60 at birth of child
- Father between the ages of 15 and 70 at birth of child
- Either parent between the ages of 15 and 60 at birth of first child
- Spouse no more than 60 years of age different from their spouse
- Person between the ages of 15 and 100 upon first marriage
- Mother and father born between 15 and 150 years prior to first child's marriage
- First child in a marriage born between 5 years prior to or up to 30 years after the marriage date
- Maximum life span is 120 years

The date estimating will let other estimated dates participate in the consensus building. If you think about it... this could lead to a situation where several generations of birth, marriage and death dates are estimated based merely a single known date. To keep estimates based on estimates in check, the following two constraints are imposed:

Maximum Degrees Of Separation From A Hard Date Is 3 - This means no more than three estimations away from a date that you've specified in your file.

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Maximum Years Of Separation From A Hard Date Is 150 - This means that a date has to be based on a hard date that occurred within 150 years of the recommendation.

On the DATA CLEANUP tab, ESTIMATING sub-tab, an explanation is provided when you select an estimating issue. This will contain a chronology of the dates that were consulted to try and produce an estimate. If an illogical situation was detected, it will exist with that list of dates.

For dates that were estimated successfully, you'll find some narrative in the MY GENEALOGY FILE tab, within PEOPLE FACTS for the person in question. This shows the dates that were used to produce the estimate.

3.11 About The <= Search Box

Most of the lists in the main window have an input box immediately above them marked "<= Search". This provides a way for you to just list those items containing the phrase you type into the search box. This works in real time** - as you type you'll see the list reduced. The search is case insensitive - e.g. whether you type in upper or lower case doesn't matter.

**When the lists are larger than a few thousand entries, it takes a little longer to get the list updated as you type, which can lead to some flashing of the list as it updates with each keystroke you make. To avoid this on these larger lists, you'll notice that the updates aren't quite real time, allowing you to typically type in a whole phrase before the list focuses.

To Do List Tab - Extended Search Capabilities

The search box in the To Do List tab has some limited capability to also do "boolean" searches - searches that have imbedded "and" and "or" logic. The special symbols used for this are as follows:

+	Means the phrase that follows must exist
-	Means the phrase that follows must not be found
&	Says to include anything with the phrase that follows the &
|	Says to also include anything the phrase that follows the |

The "|" character is the solid bar (or sometimes split bar) which is found as the upper case character of the "\" character on your keyboard. These operators are applied in left to right order. Any resulting suggestions displayed will always adhere to "+" and "-" phrase rules, regardless of any subsequent "&" or "|". In other words, the list is always constrained by the phrase used with "+" and "-".

A Special Note To TMG Users

TMG flags, both default and custom, can be used to include and exclude items from the TO DO list. Percent signs are use to mark the beginning and ending of each 'flag phrase'. The last few examples below show how this works. Since this works for custom TMG 5 flags as well, you can do things like define a "GenSmarts" flag if you want, to mark the people you want to focus on with GenSmarts.

Extended Search Capability Examples

Example 1) How can I see only the non-census suggestions?

Use a "minus" sign in front of the word, which will remove any suggestions where that word occurs:

-census

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Example 2) How can I see only the non-census suggestions available through Ancestry.com?

Select the "AVAILABLE AT RESEARCH LOCATIONS SELECTED BELOW" filter, and then further select Ancestry.com from the drop down list below. Then use:

-census

Example 3) How can I see suggestions for both Pansy Brown and Nancy Brown?

Search for Pansy or Nancy and the word Brown. Note that the "or" symbol is the solid bar which is found as the upper case character of the "\" character on your keyboard:

Pansy | Nancy & Brown

(TMG ONLY) Example 4) Display suggestions only for females (Sex Flag of 'F')

%SEX=F%

(TMG ONLY) Example 5) Display suggestions containing the phrase CENSUS and then only for people who aren't males (Don't have a sex flag of 'M')

%SEX=-M% +census

(TMG ONLY) Example 6) Display suggestions containing the phrase birth for males who are or might be living)

%LIVING=-?-N% %SEX=M% +birth

Note that as these search phrases are interpreted from left to right, "Brown & Pansy | Nancy" wouldn't work. In that case, the "Brown" part would get you all of that surname, the "Pansy" part would narrow it down further, but then the "or Nancy" would add back in anybody (even non-"Brown"s) who had the name of "Nancy". A good rule of thumb is to always put the "&" in your search phrases first, then the "|"s.

3.12 About Direct Ancestors

GenSmarts can generate a large number of suggestions for you, so it's helpful in prioritizing these if GenSmarts knows the difference between your direct lines of ancestry and someone quite distant you are carrying in your tree. To accomplish this, GenSmarts lets you "tag" a person(s) in your file as a DIRECT ANCESTOR ROOT.

Think of a DIRECT ANCESTOR ROOT as the most recent descendent of the line(s) you're focusing on. This might be yourself, if you're studying your line, or yourself and your spouse, if you're working that side also, although in that case, it'd be easier to tag one of your children, if they're in the file, since they would be a root to both you and your wife.

To setup your DIRECT ANCESTOR ROOTs, use the My Genealogy File Tab. Use the <= SEARCH box to locate the person you'd like to use. "Tag" them as a root, by pressing the TAG AS DIRECT ANCESTOR ROOT button in the lower left part of the screen. When you press that button, you'll notice a hollow blue star will appear next to the name of the person selected, noting that they're a root. You also might notice a simple star will appear next to any ancestors of this root, indicating they're in your direct ancestry line.

If you ever need to find the direct ancestors you've tagged, you can use the FIND NEXT ROOT button, which will advance the display to the next person marked as a direct ancestor root.

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To remove the direct ancestor root designation from a person, simply select them and press the CLEAR TAG button.

As you use GenSmarts, you'll notice you can use this DIRECT ANCESTOR designation to help prioritize the research suggestions, or to limit what appears on reports.

3.13 About Copy (CTRL-C)

In the registered version of GenSmarts, you can select and copy text in the descriptive windows by highlighting (with the cursor) the text to copy and then pressing CTRL-C (the control key and the C key). You then can "Paste" the selected text into other applications (your genealogy software, text editor, email, etc.), typically by using CTRL-V or, from the applications menu, EDIT...PASTE.

3.14 About Go To Individual

This GenSmarts feature provides a quick way to hop back and forth between GenSmarts and your record keeping software (Family Tree Maker, PAF, etc.). In just a couple of key strokes (two typically) you can go from the individual you're looking at in GenSmarts to that same individual in your record keeping software.

GenSmarts provides "hot keys" which map to your genealogy record keeping software's "find individual" function. After loading your file, look at the GenSmarts TOOLS... menu and you'll see a function called Go To Individual has been created and assigned a keystroke. Pressing that keystroke will cause GenSmarts to store the id number (or name if you use Family Tree Maker) of the person you're currently looking at in the clipboard, then request that Windows switch you to your record software and invoke it's "find" function. Since the id you want to find (or name in the case of Family Tree Maker) is in the clipboard, you can simply position the cursor where you need to type this in and press CTRL-V to paste the id (or name), and press enter to retrieve the data. Note - some genealogy software may not let you type the id number on it's "find" screen without first switching to "find by id" mode.

Here's an example using Family Tree Maker:

1) Begin by running GenSmarts, then start Family Tree Maker...

2) Now, suppose you're looking at the Data Cleanup tab, place names sub-tab and you find an entry you'd like to change in your Family Tree Maker file...

3) In GenSmarts, press F2 (just like you would in Family Tree Maker), and your Family Tree Maker program will come forward with the "Index of Individuals" dialog open. Note that F2 is what you use for Family Tree Maker - look in GenSmarts menu TOOLS...GO TO INDIVIDUAL... to see what "hot key" to use with other software.

4) Press CTRL-V to paste the name of the person you were looking at in GenSmarts. Family Tree Maker will "zoom" the list to that person. Press ENTER to display their data page.

5) Make the changes to your data as appropriate.

6) Manually switch back to GenSmarts, and continue your review for any other data you may want to change. Repeat steps 3 to 5 above if you find something.

7) Note that none of the changes you make in Family Tree Maker will be reflected in GenSmarts until you close Family Tree Maker, then use the GenSmarts menu option FILES...REFRESH/REOPEN to re-import the data from Family Tree Maker. GenSmarts can't do this import when Family Tree Maker is running, which is why you need to close Family Tree Maker first.

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3.15 About Variables

Hint: Usually a right click in a field that takes variable names will allow you to pick a variable and insert it.

The Customize Records function has several inputs that allow variables to be used, rather than static text. Variables are replaced with their corresponding values at run time, based on the specific of the person or suggestion being looked at. To differentiate them from text you don't want substituted, variables always begin and end with an underscore ('_') and start with the letter 'gs" as in GenSmarts. These names are case sensitive, although the forms where you input these will correct the case for you if you make a mistake. Here's a list of variables you can use in these situations and what they mean:

gsSurname - the person's surname
gsGivenName - the person's given name
gsSmartSurName - the person's surname at the time of the record in question, such as a married name
gsFirstName - the person's first name
gsFirstInitial - the person's first initial
gsLastInitial - the person's last initial
gsGroom - for marriage suggestions, if the person is male, this will be their name, otherwise it will be blanks
gsBride - for marriage suggestions, if the person is female, this will be their name, otherwise it will be blanks
gsGroomFull - like _gsGroom_ only their full name
gsBrideFull - like _gsBride_ only their full name
gsNameWithRIN - a person's full name trailed by the RIN in brackets if you've enabled that display option

gsBride - the bride name of a marriage suggestion or blanks

gsCountryName - the name of the "level 1" geographic area associated with the suggestion definition
gsCountryAb - like _gsCountryName_ only the abbreviation, rather than the name
gsStateName - the name of the "level 2" geographic area associated with the suggestion definition
gsStateNameAb - like _gsStateName_ only the abbreviation, rather than the name
gsShortGeo - the short display form of the place associated with the suggestion definition

gsStartYear - the year the record coverage starts
gsAge - a person's age in the year record coverage starts
gsBirthFromYear - the low end of a range considering when a person was born and when record coverage began
gsBirthToYear - the high end of a range considering when a person was born and when record coverage began
gsDeathFromYear - the low end of a range considering when a person died and when record coverage began
gsDeathToYear - the high end of a range considering when a person died and when record coverage began
gsOptionalYear - for suggestion definitions that only span 1 year, this will be the year, otherwise it will be blank

gsBirthYear - the estimated or recorded year of the persons birth
gsDeathYear - the estimated or recorded year of the persons death
gsBirthMonthIfKnown - the recorded month of the persons birth, if known, otherwise blank
gsBirthDayIfKnown - the recorded day of the persons birth, if known, otherwise blank
gsBirthYearIfKnown - the recorded year of the persons birth, if known, otherwise blank

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gsBirthMonthIfKnown - the recorded month of the persons birth, if known, otherwise blank
gsBirthDayIfKnown - the recorded day of the persons birth, if known, otherwise blank
gsBirthYearIfKnown - the recorded year of the persons birth, if known, otherwise blank

gsRecordType - this will be the record type of the suggestion definition
gsWorkingDir - this will be the current working directory
gsScriptsDir - this will be the current script directory

3.16 About Matching Keywords

The Customize Records function has a couple of keyword input boxes that allow support the use literal characters, sets, and wildcards.

Each literal character must match a single character in the string. The comparison to literal characters is case-insensitive.

Each set begins with an opening bracket ([) and ends with a closing bracket (]). Between the brackets are the elements of the set. Each element is a literal character or a range. Ranges are specified by an initial value, a dash (-), and a final value. Do not use spaces or commas to separate the elements of the set. A set must match a single character in the string. The character matches the set if it is the same as one of the literal characters in the set, or if it is in one of the ranges in the set. A character is in a range if it matches the initial value, the final value, or falls between the two values. All comparisons are case-insensitive. If the first character after the opening bracket of a set is an exclamation point (!), then the set matches any character that is not in the set.

Wildcards are asterisks (*) or question marks (?). An asterisk matches any number of characters. A question mark matches a single arbitrary character.everal inputs that allow variables to be used, rather than static text.

In summary, a keyword of:

Lou[i-k][!a-e]

Would match "St. Louis, Missouri"
Would match "Louisville"
Would match "Loueck"
Would not match "Loueeds"

The first asterisk allows any number of characters to proceed the matching portion, whereas the trailing asterisk allows any number of characters to follow the matching portion. Leading and trailing asterisks are almost always found in a matching pattern.

The "Lou" in the keyword requires exactly those letters, either in upper, lower or mixed case.

The [i-z] requires that the letters i, j, or k immediately follow the LOU.

The [!a-e] requires that the letters a,b,c,d, or e NOT be present after the i, j, or k.

3.17 About Suggestion Filters

In it's unfiltered state, you can think of the GenSmarts To Do list as a database of all the ideas GenSmarts has come up with for your people. While it's interesting to see what sorts to the top of that list, you typically will want to focus on suggestions for a specific person, area, or research site that you are currently working. You do that "focusing" by asking GenSmarts to "filter" the big list, so that the list contains only the suggestions that match your area of interest (e.g. person/people, place, etc.). You

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specify the filter you want by picking it from the drop down list located immediately above the To Do List. Note - if you've switched your VIEW (top line menu VIEW...) to be the classic Version 1 view, you will have to switch to one of the Normal or Advanced views to see the filter drop down.

This drop down contains several categories of things to help you specify a filter:

- **Show All Suggestions**

This isn't really a category, but a special filter that will remove all filtering and get you back to the whole list. Note that in the advanced view, this will not reset any search text in the <= SEARCH input box, so you'll need to clear that manually.

- **Common Filter Templates/Wizards**

Listed immediately under Show All Suggestions are several "wizards" for creating the kinds of filters that you will use most often. Choose the one that sounds most like the suggestions you want to see and follow the instructions contained in the template/wizard. When you're done, the wizard will create a filter for you, put it in the recently used filters list and select it for you.

- **Recently Used Filters**

This catagory contains the last several filters you've used. Want to repeat a filter you used a few minutes ago? Just pick it from this category.

- **Saved Filters**

Have you created a filter that you want to save for use again and again? You can use Advanced Filtering (described below) to do that, and then your saved filter will always be listed in this category.

- **Advanced Filtering**

Need a filter that's a bit more complicated than what you can get by using a template/wizard? Choose Create A Custom Filter... and you'll get access to all the filtering options available. Also note that the last filter you used will be listed in this category, prefaced by the phrase Edit Filter. The purpose of this is to allow you to quickly tweak the filtering of something you just used. Often it's convenient to create a filter that pretty much does what you want with one of the wizards, then use that Edit Filter (xxxx) entry to add a few finishing touches.

3.18 About Custom Marks

GenSmarts allows you to "mark" a suggestion to indicate your status. Built in marks are Found, Not Found, Plan To Search, Ignore, and Clear Status - which are explained in the The To Do List Tab topic.

Additionally, you can your own marks, to handle situations where you want to track something other than what can be handled by the built in marks. We've put in one example for you already - something called Revist Later, which was a suggestion we had from a user who wanted a way to indicate that this suggestion needed to be revisted at a later date. This was to handle cases where a website is continuing to update it's records, so perhaps Not Found is a bit too final a status to bestow on a suggestion.

As you can see in the interface, the user marks appear as buttons along side the built in status, and

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also appear as options in the filtering dialogs.

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GenSmarts

Simplifying Family History Research

Part IV

4 Other GenSmarts Windows And Dialogs

4.1 Maintain Suggestion Filters (Advanced)

This dialog allows you to access all of the suggestion filtering capability in GenSmarts. Note that it is an advanced function - the number of filters combined with the complexity of creating boolean logic make this function something that is really more for "power" users of the product. Use the templates/wizards described in the suggestion filtering topic if you find this function too complicated.

The "Now Editing:" section at the top shows you what filter you're currently editing (or the phrase New Suggestion Filter if it's a brand new one). You can open a different filter for editing by using this drop down list in the case where you want to work on several filters while this dialog is open.

Generally, each of the criteria sections, when specified, will further limit the suggestions displayed. Use the narrative in the lower right hand portion of the screen to help confirm/understand what your settings will do.

When you're ready, you can use the TEST/APPLY filter on the bottom right of the screen to try applying your filter to the To Do List window that will be in the background. You may have to move the dialog around a bit to see the To Do List behind it.

GS ID# is a GenSmarts internal number that corresponds to the specific item in our records inventory used as the basis for this suggestion. It's helpful if you want to see all suggestions of a very specific type.

Search Phrase is similar to the <= SEARCH text box on the To Do list (Classic and Advanced Views) - it matches against the suggestion title, and can contain + and - prefixes on phrases.

GenSmarts will try to generate an intelligent name (though they can get kind of wordy) for filters you create - you'll be offered a choice of using that name, editing it, or simply making up one of your own.

By default, when you're creating a new filter, it won't be permanently saved, but rather simply used once and then live in your Recently Used Filters category for awhile until it gets pushed out to make room for other Recently Used Filters. If you'd like it always to appear in your Saved Filters category, you can tick the "Check this box to permanently save this filter" option immediately above the OK button on the bottom of the screen.

By default, when you're editing a recently used filter, the result will be a new recently used filter if you simply push the OK button after making your changes. If you want to SAVE a recently used filter in your Saved Filters category, then push the SAVE... button. There's no delete button for a recently used filter - it will simply go away on it's own as you use other filters.

By default, when you're editing a previously saved filter, any changes will be saved back to the saved version of the filter. Push the DELETE button if you want to remove a previously saved filter.

Filter definitions are stored in the GenSmarts.ini file. They're not in a format that can be easily edited, but you could certainly copy the entries to another GenSmarts.ini file if you needed to move a filter between installations.

4.2 Registration Dialog

To license GenSmarts, you'll need to input a registration name and key that's emailed to you from GenSmarts support. When installing from a downloaded installation file, you are automatically prompted for this upon your first use of the software. If you're installing from a CD, the name/key is established for you by the CD installation process.

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If you need to change to a different assigned name/key (if you have multiple licenses, for example), the HELP option of The Menu Bar provides the option - ENTER YOUR REGISTRATION KEY. You'll be presented with two input boxes, one for your name and one for your key. It's best to copy and paste these from the source (email or screen), as they need to be letter for letter what was sent to you. Press OK to store your key.

This function is not supported in the GenSmarts for MyFamily.com edition.

4.3 Update Check

When you start GenSmarts and have an internet connection, a quick check is made via a web page at www.gensmarts.com to see if there are any new records available or program changes available for your version of GenSmarts.

If there is a recommended update available, you'll be presented with a window that gives you a description of what's changed, as well as an estimate of how long it will take to download the update. You then can decide to do one of the following:

- **Skip This Update (But Tell Me When The Next One Comes Out)**

Pressing this button will let you proceed on to GenSmarts and continue checking for updates on subsequent runs, however you won't be notified again of this specific update opportunity. Use this option if this update doesn't sound interesting to you, but you want to continue to be notified when future updates occur.

- **Skip Checks For 3 Months**

Pressing this button will let you proceed on to GenSmarts and there will be no checks for upgrades another 3 months. If for some reason you click this option and then change your mind, you can use a text editor to edit the GenSmarts.INI file stored in the directory where you installed GenSmarts (typically C:\Program Files\GenSmarts. That file contains the date that checking will begin again - simply change it to a date prior to today's date and you'll be back to checking updates again. Alternatively, if you simply delete this file, GenSmarts will also start checking again.

- **Click Here To Download And Apply...**

Pressing this button will start the download of the update, which will automatically be applied once the download is complete. You'll see a pop up message that the update was applied successfully, once the download has been completed and the update has been applied. If for some reason, something goes wrong, you'll be notified and given the opportunity to send an email to GenSmarts support so we can help you get updated. You'll still be able to continue on and use GenSmarts, though you'll likely get the update notification every time you run the program, until the situation gets corrected. It's okay to try to UPDATE NOW again, though you can also simply press UPDATE LATER to continue on until the problems been fixed.

Occasionally, there may be an "update to the updater". This requires that the update process be completed, before we can change it. In that case, you'll get an additional window, after the main GenSmarts screen has started to load, which notifies you that an update is about to occur. Again, you'll be notified if it succeeded or failed.

- **Proceed To GenSmarts Without Updating**

Pressing this button lets you continue on to the main GenSmarts window without applying any updates. You'll get the same UPDATE NOTIFICATION window the next time you run GenSmarts.

Optional Updates

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While you'll always be notified of recommended updates (unless you've used one of the "skip" buttons above), you have to request notification of "optional" updates. See the internet tab of GenSmarts settings for information on how to turn this option on.

No personal information is transmitted when this update check is made - the access is similar to what happens when you visit the GenSmarts website with your internet browser.

If the Update Fails...

The most common cause of the update failing is having another copy of GenSmarts running while attempting the update. If you do get a notice that the update failed, check for this situation.

4.4 Print People

This window lets you print out the people you have in your genealogy file. The options shown below let you control how that's done. After you decide on which options you'd like, press the OK button, and you'll be given a choice of which printer you'd like to use, or if you'd rather do a "PRINT PREVIEW" instead. Using "PRINT PREVIEW" is an easy way to experiment with the options, if you don't like what you see, you can easily cancel and try some different settings.

- Which People do you want to print?

Clicking the **Only the ones highlighted** option will limit the report to only the people you have selected on your current tab. You can select multiple suggestions in these lists - see the help for The To Do List Tab or The My Genealogy Tab for more information.

Clicking the **Heads Of Household Only** option is useful when printing families - the information will not be duplicated under both spouses, if they exist.

Clicking the **Direct Ancestors Only** option will limit the report to only those people marked as a Direct Ancestor. See The My Genealogy Tab for more information on how to use GenSmarts Direct Ancestor capability.

Clicking the **Head Of Household & Direct Ancestor Only** option is useful for printing families, just as the Head Of Household option is above. However, this option further limits the report to just those Heads of Household who also are marked as Direct Ancestors. See The My Genealogy Tab for more information on how to use GenSmarts Direct Ancestor capability.

- How much detail do you want to print?

Clicking the **Brief** option results in a report that contains one line of information for each person.

Clicking the **Moderate** option results in a report that contains more information - a couple of lines for each person.

Clicking the **Detailed** option results in a report where each person is shown with a full page of information.

- How do you want the information sorted?

Clicking the **By Date Of Birth** option results in a report that sequences the information by date of birth, oldest first.

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Clicking the **By Last Name** option results in a report that sequences the information alphabetically by the surname of the person in question.

4.5 Print To Do List

This window lets you print out the research suggestions that GenSmarts has produced for you. The options shown below let you control how that's done. After you decide on which options you'd like, press the OK button, and you'll be given a choice of which printer you'd like to use, or if you'd rather do a "PRINT PREVIEW" instead. Using "PRINT PREVIEW" is an easy way to experiment with the options, if you don't like what you see, you can easily cancel and try some different settings.

- Which To Do's do you want to print?

Clicking the **Only the ones highlighted** option will limit the report to only the suggestions you have selected in the "To Do List" tab, or the "Research Locations" tab, if you happened to be currently displaying that tab. You can select multiple suggestions in these lists - see the help for The To Do List Tab for more information.

Clicking the **Only those marked "Plan To Search"** option will limit the report to only those suggestions that you've marked as such. See the help for The To Do List Tab for more information on what "Plan To Search" means.

Clicking the **Only those marked "Searched And Found"** option will limit the report to only those suggestions that you've marked as such. See the help for The To Do List Tab for more information on what "Searched And Found" means.

Clicking the **Print All Displayed** option limits the report to just those suggestions that are currently contained in the suggestions list on the "To Do List" tab, or the "Research Locations" tab, if you happened to be currently displaying it. You can change what's displayed in the list by "focusing" it, either with the "<= Search" box, or by using the Filter To Do List options.

- How much detail do you want to print?

Clicking the **To Do List** option results in a report that contains one line of information for each To Do.

Clicking the **Moderate** option results in a report that contains more information - a couple of lines for each To Do.

Clicking the **Worksheet** option results in a report where each To Do is shown with a full page of information, including a place for you to record your research notes.

Clicking the **Research Pack** option results in two reports being produced, one Worksheet style report, and one report containing background information on each person that is the subject of the To Do's selected. This report is useful to take with you when you make a visit to a research location - you've got all your To Do's and a complete set of background information in one report. An additional important note about this report... when you're Filtering By Research Location in The To Do List Tab this report contains additional information specific to the locations you're filtering by.

- How do you want the information sorted?

Clicking the **By Record Geography** option results in a report that sequences the information alphabetically by the location of the record being research. For example, to group the To Do's together by county and state, you would select this option.

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Clicking the **By Surname** option results in a report that sequences the information alphabetically by the surname that is the subject of the To Do.

4.6 Print Call Numbers

This window lets you print out the library call numbers from the suggestions that GenSmarts has produced for you. The options shown below let you control how that's done. After you decide on which options you'd like, press the OK button, and you'll be given further choices, such as a choice of which printer you'd like to use, or if you'd rather do a "PRINT PREVIEW" instead. Using "PRINT PREVIEW" is an easy way to experiment with the options, if you don't like what you see, you can easily cancel and try some different settings. For file exports, you'll get choices for the output file name and location.

- Which To Do's do you want to print?

Clicking the **Only the ones highlighted** option will limit the report to only the suggestions you have selected in the "To Do List" tab, or the "Research Locations" tab, if you happened to be currently displaying that tab. You can select multiple suggestions in these lists - see the help for The To Do List Tab for more information.

Clicking the **Only those marked "Plan To Search"** option will limit the report to only those suggestions that you've marked as such. See the help for The To Do List Tab for more information on what "Plan To Search" means.

Clicking the **Only those marked "Searched And Found"** option will limit the report to only those suggestions that you've marked as such. See the help for The To Do List Tab for more information on what "Searched And Found" means.

Clicking the **Print All Displayed** option limits the report to just those suggestions that are currently contained in the suggestions list on the "To Do List" tab, or the "Research Locations" tab, if you happened to be currently displaying it. You can change what's displayed in the list by "focusing" it, either with the "<= Search" box, or by using the Filter To Do List options.

- Print call numbers for which library?

The suggestions you've selected using the "Which To Do's do you want to print?" section described above, will be available at one or more libraries/research facilities/web sites. These will be contained in a list - pick the library from the list that you want call numbers for.

- What type of output do you want?

Choose the type of output you want, either a print option or a specific type of file.

4.7 Print Place Name Cleanup Issues

This window lets you print out issues GenSmarts came across when trying to interpret your place names. Often these turn out to be typos in your data or misspellings. Occasionally, you'll find that your data is fine, and that GenSmarts is simply limited in it's ability to understand a certain type of geography - historical counties, or non-standard abbreviations, for example. The options shown below let you control how that's done. After you decide on which options you'd like, press the OK button, and you'll be given further choices, such as a choice of which printer you'd like to use, or if you'd rather do a "PRINT PREVIEW" instead. Using "PRINT PREVIEW" is an easy way to experiment with the options, if you don't like what you see, you can easily cancel and try some different settings. For file exports, you'll get choices for the output file name and location.

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- Print issues for which people??

Clicking the **Only the ones highlighted** option will limit the report to only issues for people you have selected on your current tab. You can select multiple suggestions in these lists - see the help for The To Do List Tab or The My Genealogy Tab for more information.

Clicking the **Direct Ancestors Only** option will limit the report to only issues for those people marked as a Direct Ancestor. See The My Genealogy Tab for more information on how to use GenSmarts Direct Ancestor capability.

Clicking the **All Place Name Issues For People From The To Dos Currently Displayed** will look through the current suggestions you have displayed and pick out the people those suggestions are for.

Clicking the **All Issues** option will print issues for all people in your file.

- What type of items do you want to print?

Clicking the **County Lookups** will generate a report containing all the places where you had specified a city and a state/province, but no county... and GenSmarts was able to look the county up for you.

Clicking the **Missing Places For Recent Events** option results in a report that lists events documented in your file that are so recent that you would expect the place of the event to be know... but it wasn't found in your data.

Clicking the **Partially Recognizable Places** option results in a report that lists cases where GenSmarts believes there's likely a more specific place intended that what was able to be recognized. An example of this would be where a county was misspelled.

- How much information do you want to print on each issue?

Clicking the **Just the basics** option will only give you a few lines of information on each issue - perhaps 10 or so will fit on a page.

Clicking the **Include a paragraph** option will give you full information about each issue - about a half a page.

- How do you want the information sorted?

Clicking the **By Last Name** option results in a report that sequences the information alphabetically by the surname of the person in question.

Clicking the **By Place Name** option results in a report that sequences the information by place.

- What type of output do you want?

Choose the type of output you want, either a print option or a specific type of file.

4.8 Settings Dialog

This window lets you control how GenSmarts works. Your choices here are saved in the file GenSmarts.INI in the GenSmarts program directory.

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- **Analysis**

Estimate Dates and Places If Not Specified - To produce suggestions for you, GenSmarts will makes some educated guesses about where and when events took place. For example, you may not know where an ancestor died, but the marriage location of his or her oldest daughter might be a good place to look. GenSmarts will preface dates it has estimated for you with the abbreviation GSEST., and will put the word "perhaps" in front of any locations it's estimated. You can uncheck this box if you'd prefer that GenSmarts not do any estimating to produce it's suggestions.

Lookup County Names If Not Specified - To produce county level suggestions for you, such as land transactions at the Family History Library in Salt Lake City, GenSmarts has to associate a county with events you've specified in your file. If you've specified only a city and a state, GenSmarts will attempt a lookup to find the county. This saves you from having to go back in your file and record all the county names. The Place Names section in the Data Cleanup tab has a log of the county names that were found and used in making recommendations. You can uncheck this box if you'd prefer that GenSmarts only make county level recommendations where you've specified a county.

Automatically identifying a county name from a city and a state or country will never be 100% accurate, so be sure to check these assumptions as you review GenSmarts suggestions. There are places with the same names, and a place can exist in multiple counties over time - two complexities not currently support by GenSmarts algorithm for suggesting a county name for you.

Mark Siblings of Direct Ancestors - Extends GenSmarts Direct Ancestor tags to include siblings of those identified as your direct ancestors.

Enable Source Auditing... - Want GenSmarts to try to interpret your sources and help you find things you're missing (or avoid suggesting things you seem to already have)? Check this box to enable that function.

Remove suggestions that match existing... - Don't want to see suggestions that seem to be duplicates of things you already have documented? Check this box and GenSmarts will be more selective in what is suggested, based on the content of your sources. When unchecked, GenSmarts will retain the suggestions, but with a special "mark" (a large or small diamond) to indicate the possible duplication.

Include Source Text - There are a few situations in explanation text where GenSmarts will use the text from your sources, if it is available. Since this text can be quite lengthy, we leave this option off by default, as it could consume large quantities of your memory (RAM not disk space) when GenSmarts is running. You can try turning it on and see if your computer has the resources to support it.

Default Country - Often time when place names are recorded, the country is only noted when it's different from the genealogist's own country. For example, if you and your recent ancestors are from Canada, your place names don't likely contain the word Canada, because that's assumed. To help GenSmarts better interpret your place names, you can specify your "home country", or your "assumed country". It's just a hint for GenSmarts, so don't worry if you have more than one - just pick the one you think is most prevalent in your data.

- **Backup**

If you select Backup Files Automatically, GenSmarts will make backup copies of the following three files whenever there's a change:

- GenSmarts.INI, which contains your settings
- DirectAncestors.CSV, which contains the people you've tagged as direct ancestors
- ResearchResults.CSV, which contains the research results you've marked

The names of the backup files are identical to the names above, except the word 'Backup' has been

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added to the front of the name. If you should ever need to restore to a backup file, simply create a copy of the 'Backup' file and rename it to its corresponding name above.

Clicking on the Select Backup Drive/Directory Button will let you specify where you want the backups located. While the simplest thing to do here is to specify the GenSmarts program directory (which is the default), it's a good idea to change the backup drive/directory to another disk device/directory. For example, if your GenSmarts program directory is c:\windows\program files\gensmarts, and that's also your backup directory... if you had a hard disk crash, then you'd lose both your working files, as well as your backup. It would be better to have your backup directory on another hard drive if you have one (example - D:\) or use a floppy (A:\) otherwise. You can't create new directories with this button - if you desire to create a new directory for the backups, use Windows Explorer or similar tool to do so, then click on the Select Backup Drive/Directory Button.

When you specify a non-hard disk for backup, GenSmarts will notify you prior to performing the backup. This will give you a chance to insert a disk or take whatever special actions you need to prior to backup.

If for some reason an error is encountered during backup, an error message is produced. Examples of possible causes are disk full, disk not ready, and disk write protected.

- **Display**

Ignore Save Issues Warnings. - Changes In GenSmarts Version 1.0.2.14 and above have made these warnings much more selective than they were in earlier version, so you'll likely want to leave this unchecked. See the About Save Issues Help topic for more information on this option.

Show ID Numbers - Displays the record id number along with a persons name. This is helpful in moving back and forth between GenSmarts and your genealogy software.

Open GenSmarts In A Maximized Window - When started, GenSmarts will expand to take up the full screen automatically if this option is checked. This is simply the default size at startup - you can resize the window after open.

Kiosk Mode - If this option is selected, then GenSmarts won't assume that you have a file that you want to load or reload when started. Rather, it will present you with an option to either enter some data by hand (using the Query tab), or load a file. This is useful when GenSmarts is used in library settings where often times a customers file is not available to load.

Display "Confused" Help Button - The button labeld "Confused? Click here for help..." in the upper right hand corner of the main display may be distracting after you've become comfortable with GenSmarts. This option allows you to make that button go away.

- **Files**

Automatically Open Last File Used At Startup - This is likely how your genealogy software works - the last file you worked with is opened automatically when you run the software. By default, GenSmarts works the same way. If you'd prefer to be presented with a list of files to choose from, including the last ones you worked with, leave this unchecked.

Use Working Directory To Store Files (rather than Program Directory) - The default location for GenSmarts to store it's information is in it's program directory. If you'd like to change that to another directory, you'll need to set up a windows shortcut with "the other directory" as the working directory, and select this option. You'll also need to move any pre-existing files from the program directory into this working directory. The two files at issue are DefaultDirectAncestor.CSV and ResearchResults.CSV. See this topic for some related explanation.

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Use File Name As Prefix For GenSmarts Files - GenSmarts stores information in two files - DefaultDirectAncestors.CSV contains the "direct ancestor tags" you've selected, and ResearchResults.CSV contains any marks you've made on research suggestions (Found, Not Found, Plan To Search, etc.) By default, all tags and marks made across all files are stored in these two files. If you'd prefer to create separate individual files for each unique file you work with, check this option. You'll need to reapply any existing tags and marks, or use Windows Notepad.exe to manually split apart the existing files.

- **Integration**

Use Legacy Direct Line Ancestors - This option disables GenSmarts Direct Ancestor setting functions, and instead uses what you've marked in Legacy Family Tree as your direct line.

Default Search Site Linking - This option determines the default action to use when the AVAILABLE ONLINE button is clicked. The first option, USE PREFERRED BROWSER, will launch the browser you've selected in INTERNET SETTINGS. Depending on the site, search criteria may or may not be applied and submitted. The second option, USE IE WITH SMARTLINK, launches MS Internet Explorer and fills in the search criteria for you to review/tailor/submit. The third option, USE IE WITH SMARTSEARCH is identical to the second option and additionally, the search is submitted for processing. These options are merely the default... you can always choose the specific search using the AVAILABLE ONLINE button drop down menu.

- **Internet**

It's helpful for GenSmarts to know how you're connected to the Internet so as to use those capabilities appropriately. For example, if you're using a dial-up connection that's not normally connected, choose Modem (Ask Before Connecting) so GenSmarts won't access the Internet unless you perform an explicit online function.

You can also specify proxy connections, if your connection requires it. The Test Connection button is provided if you want to test to see if your connection and settings are working.

The default settings are High Speed and no proxy.

You have two options to specify how frequently you'd like to be notified of GenSmarts updates. The default option, Recommended Updates Only , is notification of any *recommended* updates. Typically these would occur a couple of times per year. We do post minor updates and beta versions more frequently than that, sometimes several per week! If you'd like to be notified of these more frequent types of updates, check the Any Updates option. Also see the Update Check topic for more information on updates.

Use Windows Default Browser - When GenSmarts launches a site for you, it simply "executes" the URL and let's Windows select the browser to display it with. If you'd prefer GenSmarts to use a specific browser, you can specify it by selecting the browser executable using the SELECT BROWSER EXECUTABLE button. This will automatically check the Use Alternate Browser option for you.

- **Subscriptions**

This tells GenSmarts to which online research services you subscribe so the appropriate research links are generated. These subscriptions default to not subscribed.

For some special considerations regarding Heritage Quest, see the "How do I set up my Heritage Quest access?" topic in the FAQ section.

- **Marks**

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To define a custom mark that will be available for you to attach to a suggestion, simply pick an empty slot, give it a name, and choose an icon for it. It will then appear on the TO DO list screen so you can use it to mark suggestions. You'll notice that we provide GenSmarts with one custom mark as an example, something called Revist Later. Note the ampersand (&) in that caption proceeds the keyboard accelerator key we wanted as a convenience. So when you're on the TO DO list screen, you can keyboard ALT-L instead of clicking the button with the mouse, if you prefer. You don't have to include an ampersand in your caption. You can also delete our sample if you like, just delete the caption text and the related button that was appearing on the TO DO list screen will also go away.

- **Colors/Fonts**

Here you can design your own scheme on how you'd like to use colors and fonts in the GenSmarts TO DO list list and explanation.

Over time we'll add support for picking up the "by person/line" color coding you have in your genealogy file itself. Not all record keeping software supports color coding, and we haven't integrated GenSmarts yet with the color coding mechanism that do exist. So the availability of "by person/line" color coding will vary, though hopefully get more complete as time goes on.

4.9 Partial File Analysis

This tool enables you to define the subset of people from your file you'd like GenSmarts to create suggestions for. The criteria for each subset is saved in a special GenSmarts "GSF" file (a file ending with the prefix of GSF). You can create many different subsets, giving each a unique descriptive name. These GSF files (criteria defining a subset of the people in your file) can be "opened" (FILE…OPEN…) by GenSmarts, just as you would your complete file. Since the GSF file doesn't actually contain any people from your file (it just has the criteria to select them), it will change and adapt as you make changes to your complete file automatically.

The dialog is similar to a wizard in that it contains built in help text, steps and comments to guide you through the process. You will generally only use one of the tabs in the dialog. For example, if you're trying to create a new subset of people to get suggestions on, you'll use the default tab of "Create A New Subset", and you won't need to go to the other tabs. On the other hand, if it's a previously defined subset you want to maintain, you'll only need to use the "Change An Existing Subset" tab. Likewise, to delete an existing subset, you'll only use the "Delete An Existing Subset" tab.

Remember that these subsets you're defining are simply a "read only" way of looking at your file. Your file itself is not changed in any way by creating, editing, or deleting these views.

The Choose People From Your File dialog topic explains more about the process of identifying the people you want to analyze.

Note that this is an advanced function - the concepts of multiple views on a set of data, management of the GSF files, and general complexity of selecting from a hierarchical structure (your people) make this function something that is really more for "power" users of the product.

4.10 Choose People From Your File To Analyze

This tool shows you people in your file (a list on the left hand side) and allows you to select people that you want GenSmarts to analyze (a list on the right hand side).

Depending on which people or how many people you want, you may find it more convenient to start with an empty selection list (the default) and add to it, or you may find it more convenient to start with everyone selected (push the INCLUDE ALL => button) and then choose people to be excluded.

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To include a person, select the individual on the left hand list. You'll notice the top portion of the screen now shows the person's name. At this point if you press the "ADD PEOPLE TO YOUR SUBSET =>" button, you'll add this person (and this person only) to the right hand selected list. If you want to add multiple people based on this person (all this person's ancestors or descendents, for example), choose the corresponding options from the adjacent two drop down lists before pressing the "ADD PEOPLE..." button.

Excluding works in a similar manner, though you pick the person to exclude from the right hand list (the list of people already selected). You'll see that the button at the top changes it's caption to "<= REMOVE PEOPLE FROM YOUR SUBSETt". As with including, you may extend your selection from this person using the two drop down option lists above the "<= REMOVE..." button.

At any time, to start over with a full or empty select list, simply press the INCLUDE ALL => button or the <= EXCLUDE ALL button.

When you're finished press OK, or choose CANCEL to abort.

Note that this is an advanced function - the concepts of multiple views on a set of data, management of the GSF files, and general complexity of selecting from a hierarchical structure (your people) make this function something that is really more for "power" users of the product.

4.11 Export To Microsoft Access

This dialog allows you to create tables in a new or existing MS Access database. The table names and columns available are fixed, and may or may not be exported depending on the type of report being run. Those tables that will be exported are shown in the TABLES: list box. You may choose to disable the exporting of any table by unchecking it.

If a database doesn't exist it will be created. Existing data in tables being exported will be cleared by each export.

If a table doesn't exist yet in the database, it will be created with all columns. If it already exists, only those columns which are currently defined will be exported. This is handy for situations where you have an ongoing export that you run and only want to export a few columns. Create a unique database for that export. Run a small export to get the tables defined. Use MS Access to remove the columns you don't want. Now, as long as you export to this database, only those columns will be exported.

Note that this is an advanced function - making use of the data exported to Microsoft Access will require some amount of computer programming, which is certainly not something we would expect most users to be comfortable with. We provide this function for power users who want to create custom utilities for their personal genealogy data.

TABLES AVAILABLE FOR EXPORT

gsPeople - contains data about each person, the columns are as follows:
- personNo - relative person#
- rin - internal rin from file
- rinPrefix - rin prefix
- rinLabel - external rin
- fullName - identifying label
- listName - name that includes person B. D. years
- longName - name that includes person B. D. years and places
- birthLabel - includes both date and place of birth
- deathLabel - includes both date and place of death
- birthDate - date of birth
- birthPlace - place of birth
- deathDate - date of death

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deathPlace - place of death
fName - name of father
mName - name of mother
fListName - name of father w/b.d. years
mListName - name of mother w/b.d. years
fLongName - name of father w/b.d. places/years
mLongName - name of mother w/b.d. places/years
altSpellings - list of alternative surname spellings
soundex - soundex code
sex - sex, Male, Female, Unknown
dirAncestor - Is Direct Ancestor? Yes or No

gsResearchSuggestions - contains data about each suggestions, the columns are as follows:
resSugNo - relative suggestion# for this export
gsId - gensmarts inventory id
shortName - identifying label
listName - name that includes person name
timeSpan - label specifying the date range of the record set
geography - label specifying the geography covered by the record set
recordName - label specifying the name of the type of record
shortExplan - short text paragraph commenting on the suggestion
explanation - text paragraph commenting on the suggestion
fullExplanation - big text paragraph commenting on the suggestion
form - form to record results
resultsTag - one character describing found/notfound/notsearched/etc
wingdingTag - one symbol describing found/notfound/notsearched/etc
pFullName - identifying label
pListName - name that includes person B. D. years
pLongName - name that includes person B. D. years and places
pNarrative - short paragraph about the person
rin - internal rin from file
rinPrefix - rin prefix
rinLabel - external rin
pBirthLabel - includes both date and place of birth
pDeathLabel - includes both date and place of death
pBirthDate - date of birth
pBirthPlace - place of birth
pDdeathDate - date of death
pDeathPlace - place of death
pFName - name of father
pMName - name of mother
pFListName - name of father w/b.d. years
pMListName - name of mother w/b.d. years
pFLongName - name of father w/b.d. places/years
pMLongName - name of mother w/b.d. places/years
pAltSpellings - list of alternative surname spellings
pSoundex - pSoundex code
pSex - sex, Male, Female, Unknown
pDirAncestor - Is Direct Ancestor? Yes or No

gsSuggestionsLocationsXref - the intersection of suggestion x location, the columns are as follows:
resSugNo - relative suggestion# for this export
gsLocNo - unique location# for this export

gsResearchLocations - contains data about research locations, the columns are as follows:

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locNo - relative location#
gsLocNo - unique location#
name - identifying label
addr1 - first line address
addr2 - second line address
city - identifying label
stateAbbrev - state/province abbrev
zip - postal code

gsCall Numbers - contains data about library call numbers, the columns are as follows:
bookNo - relative book# for this export
gsId - gensmarts inventory id
locNo - location number
locName - location name
callNo - call number
title - title
event - event desc
personName - person name
personFacts - person facts
personContext - person name in context
fillsMissing - fills missing data

gsPlaceCleanup - contains data about a place name cleanup issue, the columns are as follows:
personName - person name
rin - internal rin from file
rinPrefix - rin prefix
rinLabel - external rin
event - event desc
filePlaceName - place name coming from your file
gsPlaceName - place name estimated by GenSmarts
gsPlaceNameCopy - copy format of GenSmarts estimated place name
issueDesc - short comment describing the issue found
issueDescOrBlank - same as issueDesc but blank for all but the generic report
comment - narrative explaining the cleanup issue

4.12 Export To Microsoft Excel

This dialog allows you to create tables in a new or existing CSV file, which is readable by Microsoft Excel. On most Windows systems with Excel, simply double clicking on the CSV file will cause Excel to open the file. Logically, there are often several tables of data that constitute a report. These are exported to individual CSV files in a directory of your choosing. The filenames and columns in the file/spreadsheet are fixed, and may or may not be exported depending on the type of report being run. Those files that will be exported are shown in the CSV FILES: list box. You may choose to disable the exporting of any file by unchecking it.

If a file doesn't exist it will be created. Existing data in files being exported will be cleared by each export.

For a description of the tables that can be exported and what columns they contain, see the Export To Microsoft Access topic. Each table shown at the bottom of that topic corresponds to a CSV/Excel/Spreadsheet file that can be created using this export.

Note that this is an advanced function - making use of the data exported to Microsoft Access will require some amount of computer programming, which is certainly not something we would expect most users to be comfortable with. We provide this function for power users who want to create custom

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utilities for their personal genealogy data.

4.13 TMG Data Set Selector

When opening a TMG project with multiple data sets, this dialog allows you to select one or more of the individual data sets to load and analyze. This function is not supported in the GenSmarts for MyFamily.com edition.

4.14 Output Options Dialog

This dialog is presented after you select a report's options (contents, sort order, etc.). It allows you to specify the destination for the report. Note that currently, only Printer or Preview are supported (File is not available yet).

To change the destination printer or it's options, press the Setup button.

4.15 Query Results Dialog

This dialog is produced by the Query tab of the main interface, and contains a list of suggestions generated. The functionality of this window is similar to the To Do List, Explanation, and Available Online Button portions of the To Do List Tab.

No printing, sorting or searching is available from this dialog.

4.16 Kiosk Mode

When GenSmarts is in Kiosk mode, you simply supply GenSmarts with a couple of facts about an ancestor and press the GENERATE SUGGESTIONS button to receive research suggestions.

Some tips on how to enter Names, Dates, and Places:

Entering Names

Names should be entered in the form of given name followed by last name, as in..

John Doe

Entering Dates

For dates, simply type the year, as in...

1850

Entering Places

For places use the form of city, county, state, country, as in...

Chicago, Illinois
Chicago, IL
Kinsale, Cork, Ireland
Kinsale, County Cork
Kinsale, Cork

You generally don't have to specify the country if it's obvious to what country it belongs. You can always add it and hit the GENERATE button again if you find that GenSmarts is not recognizing the place correctly. None of the suggestions are currently based on the city, so it's typically not worth the

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extra effort to type it. The exception to this is if you don't know the county/state... then you should specify the city as GenSmarts has the capability to lookup the county/state for you, subject to the limitations discussed with the Lookup County Names If Not Specified option in the Settings Dialog. Specifying a city only, with no country or county/state will generally not be recognized.

Printing

There is currently no support for printing the suggestions generated in Kiosk mode.

4.17 eMail/Copy Dialog

This dialog is reached by using the email/Copy button found on the My Genealogy File tab. You can use this button to quickly generate an email or copy to the clipboard a brief narrative of the people selected.

Control of the content of the narrative is accomplished by checking the following options:

Leave off RINs - Selecting this option will suppress the display of the record id numbers.

Leave off estimated dates - Selecting this option will suppress the display of any dates estimated by GenSmarts.

Leave off estimated places - Selecting this option will suppress the display of any places estimated by GenSmarts.

Show estimated places only if missing - Like the "Leave off estimated places" option above, except that estimated places will be included in cases where no place name was specified in your file.

Copy to Clipboard Only - Selecting this option will suppress the generation of an email, and simply copy the narrative(s) to the clipboard so you may paste them in whatever application you wish.

NOTE: GenSmarts uses Windows MAPI interface to generate this email. If you have difficulty getting the email to generate, you may need to enable MAPI support in your email client. For example, Netscape has a setting in it's preferences called "Use Netscape Messanger from MAPI-based applications". Not all email packages support MAPI, if you're using one that doesn't you'll have to use the "Copy to Clipboard Only" option, press OK to perform the copy, create the email yourself, and then use your emails paste function (CTRL-V should also work) in the body of the email.

4.18 Customize Geography Form

This form is reached from the TOOLS menu option and allows you to add custom geographic names to GenSmarts. Currently, the primary motivation for doing this is to improve the recognition of place names in your file. GenSmarts won't generate any suggestions for the places you add - as the geography for all places covered by GenSmarts is already present. A future version of GenSmarts is envisioned that will allow you to define custom research material and associate it with system or custom geography.

When user defined geography is detected in a place name, no deeper validation is done, and the item won't appear in the data cleanup list.

How does your choice of default country in GenSmarts TOOLS...SETTINGS...ANALYSIS TAB... affect the way you define custom geography? It doesn't - they aren't related. The default country is simply a hint that comes into play during interpretation when no country is found in your place name. Any custom geography must be defined within known geography, unless you're defining a custom country.

CAUTION: Defining geography may seem like a straight forward enough task, but it can be complex,

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abstract, and there can be multiple approaches to how things are defined. This task is further complicated by the fact that the GenSmarts geography model is loaded into memory when at program startup, and for speed optimization reasons, is only used during the analysis proces that occurs when a file is OPENed or REFRESHED. So customizations made to the geography model will require REFRESHing the file currently loaded to see a change take place in suggestions or cleanup lists. And the changes to the geography model will also need to be saved to disk to make them permanent. GenSmarts will prompt and remind you of these things, but it's helpful to understand what's going on behind the scenes.

Remember that GenSmarts doesn't require or expect everyone to define their own custom geography... it's provided for those users that want more control over GenSmarts analysis process. Or for those users that can't sleep at night knowing there's an entry in their GenSmarts data cleanup list that shouldn't be there because the place name is valid.... :-)

Here are some simple examples where you might find it useful to add custom geography.

Example A) You have some U.S. historical counties in your place names, that show up as B) items in the clean up list.

Solution: Add a user defined county to an existing US state.

GenSmarts doesn't include a complete inventory of historical counties in it's database, so if you find a historical county kicking out on the Data Cleanup/Place Name list you can add that county, attached to the appropriate state, and GenSmarts will then know that it's a legitimate place and remove it from the cleanup list.

For convenience, if you right click on a B) item in the data cleanup list, you'll often find a convenient menu option to add the county from this point, which may be faster (if GenSmarts guessed the State and Country correctly - make sure you verify what the option says it's going to do), than using the Customize Geography form.

Example B) You have a historical *country* in your place names.

Solution: Add a user defined *country*.

GenSmarts doesn't include a complete inventory of historical countries in it's database, so if you find a historical country kicking out on the Data Cleanup/Place Name list you can add that country and GenSmarts will then know that it's a legitimate place and remove it from the cleanup list.

If you add a country, while the tool will let you add subordinate places within that country, there's little motivation to do so currently, as GenSmarts will halt validation of a place name once a user defined bit of geography is encountered. An advantage of this is... if you have lots of places that aren't known to GenSmarts, all you have to do is define the unknown countries involved... and GenSmarts will consider any place in those countries to be acceptable (e.g. it won't show up on the data cleanup report).

Example C) Your ancestor was Dr. Mudd who lived on Fort Jefferson Island, off the coast of Key West, Florida for a spell...

Solution: It depends...

There are any number of ways you could specify this place, all with their own advantages/disadvantages:

City	County	State	Country
Fort Jefferson	Fort Jefferson	Dry Tortugas	USA
Fort Jefferson	Fort Jefferson Island	Fort Jefferson Island	Dry Tortugas
Fort Jefferson	Monroe	Florida	USA
Fort Jefferson	Fort Jefferson Island	Dry Tortugas	USA

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GenSmarts won't care which of the above you choose - as long as it matches up with the way the place name is specified in your file.

4.19 Customize Records

Now you can define your own rules and have GenSmarts analyze for any record you want… and create your own custom actions to be taken on the results!

We call this tool the "sandbox" because it lets you play with different types of rules and actions until you get the results you want, without affecting the normal GenSmarts analysis.

We've set up a "home page" for news, training and tips related to this enhancement, check it periodically for new content:

http://www.GenSmarts.com/customAnalysis.asp

Lastly, this is an advanced function. It isn't something you need to understand or take advantage of to use GenSmarts. For those users that understand abstraction, it allows the definition of abstract rules for customized research analysis. Take a look at the training materials and look at the examples we've provided. if you still don't understand, that's ok - you won't be able to use this function, but you will be able to find and use the definitions created by others.

This is phase one of this enhancement. In phase two, we'll add the remaining tools that let you blend this custom analysis in with the regular GenSmarts analysis, enabling you to print, mark them Found, Not Found, etc. In phase three, we'll add some more tools that make it easy to find and use custom analysis created by others, and vice versa.

Variables may be used when specifying the rules for custom analysis. You'll find a small question mark ("?") button next to fields that support this. Click on that button to get a description of the variables that may be used.

Wildcards are allowed when specifying keywords.

4.20 Frequent Asked Questions

This dialog can be reached via the HELP menu option, or via the "Confused? Click here for help..." button on the main interface.

The Frequently Asked Questions dialog links you to the GenSmarts training website. Specifically, some of the more common topics and questions are displayed on a button that links you directly to the training content for that item.

If you have a question that's not specifically listed, you can search our training library for your question by simply typing it in the input box at the bottom of the form and pressing the button below.

If you find the Confused Button on the main form distracting, you can make it go away by selecting the check box labeled with this option on the bottom of the form.

To access the web based training content, GenSmarts simply requests the display of the appropriate URL from Microsoft Windows. Windows will launch whatever you have configured as your default browser to this URL. If a different browser is being launched than the one you normally use, you may want to check your SETTINGS in that browser and perhaps make it your default to windows - that's usually an option. If no browser is being launched, then your Windows internet settings have likely been altered by installing/uninstalling browsers... you may want to re-install your current browser to resolve this.

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The GenSmarts training website requires Macromedia's FLASH plugin, which most users already have installed on their PC's. If you're missing this plug-in, you'll be prompted with an opportunity to download and install it. It's free and a small download.

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GenSmarts

Simplifying Family History Research

Part V

5 Other Topics

5.1 What countries does GenSmarts support?

Our testing to date has been with U.S. research, and that's the focus with our first version. There's really nothing in GenSmarts, however, that's that unique to U.S. research, aside from the definition of geographies (e.g. country, state, county/parish/etc), record types(e.g. census, land transactions, etc.) and record locations (e.g. inventories of libraries, websites, etc. and their holdings). This may extend fairly easily outside the U.S. - but we haven't tested it yet. To be interesting for use outside the U.S., we would need to add the appropriate record types and inventories.

We currently do, at least, try and recognize when a place name is not in the United States, even if we won't have any suggestions for research outside the USA. For a list of countries we're sensitive to, see The Data Cleanup Tab.

If people are interested, and willing to converse with us a bit about what they'd like to see supported, we're game to try and get it into GenSmarts as quickly as we can.

Drop us a note at support@gensmarts.com and let us know what countries you think we should add support for next.

As an aside, we don't have any plans for anything other than an English language version of the software at the moment.

5.2 Can I add my own facilities and records?

We're working on it...

We have two enhancements in the works for this.

Through our website, anyone will be able to define new research facilities and the record sets they have available. We'll validate that information and compile it for GenSmarts, and distribute it as an update to everybody.

You'll be able to add your own personal library into your copy of GenSmarts. Imagine loading a friends file up into your GenSmarts to see if any of your personal records can help them out...

5.3 Can I get a site license for my library/historical society?

We're working on a special edition of GenSmarts for you that will be free for your use when used against records you have available at your facility. And we'd like to couple it with a basic, easy to use input capability so patrons who didn't have an electronic version of their ancestry could at least input a few things and generate some suggestions.

Contact us at lhsprogram@gensmarts.com for more information, and let us know if you'd like to be a beta tester in this program.

5.4 How do I use GenSmarts with several different Genealogy files?

By default, GenSmarts is installed with a configuration that's optimized for working with a single genealogy file. While this also works just fine for loading and analyzing multiple files, some people may prefer more flexibility in how GenSmarts stores it's research results and direct ancestor settings. This topic explains how to change that configuration to work more effectively with multiple files.

To understand how to change this configuration, it's necessary to understand a bit more about how

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GenSmarts stores these tags and marks. All research results and direct ancestor settings are stored in two files:

- ResearchResults.CSV
- DefaultDirectAncestors.CSV

By default these two files are located in the GenSmarts program directory, typically C:\Program Files\GenSmarts on most machines, unless the defaults were changed at installation time.

A more flexible configuration when working with multiple files is to have these two files be unique for each genealogy file you intend to work with. There are two settings that can be used to change to achieve this, either alone or in combination. One controls the directory where the files are located, the other controls the actual name of the files themselves. We'll describe each of these separately.

Technique A) Making the filenames unique

If you turn the Use File Name As Prefix For GenSmarts Files setting on, then GenSmarts will use the filename as a prefix when naming it's files. For example, the "ResearchResults.CSV" file becomes "Sample.Ged_ResearchResults.CSV". This technique is the simplest way to get unique files.

Technique B) Making the directories unique

Another way of making the files unique is to have them stored in a unique directory. This can be accomplished with the Use Working Directory To Store Files (rather than Program Directory) options (see Settings Dialog). This is a bit more work, however, because you'll need to create different windows shortcuts to specify the various different working directories. The following describes how that can be done:

A) If the different files to be loaded/analyzed already exist in different unique directories, those directories can be used to contain GenSmarts associated ResearchResults.CSV and DefaultDirectAncestors.CSV. Otherwise, unique directories will need to be created for each different genealogy file you plan on using. Here's an example:

- C:\GENEALOGY\MYFAMILY will contain the genealogy file you use to document your personal line, as well as the two GenSmarts files above, which will contain the marks and tags unique to your line.
- C:\GENEALOGY\MYHUSBANDSFAMILY will contain the genealogy file you use to document your husbands family, as well as the two GenSmarts files above, which will contain the marks and tags unique to your husbands line.

B) Use the TOOLS...SETTINGS... dialog to select the Use Working Directory To Store Files option. It's in the tab marked FILES.

C) By default, the automatic backups for these files will all go into the GenSmarts program directory as well. That can be changed to also store the backups in the "working directory" by removing the following line from the [BACKUP] section of the GenSmarts.INI file:

Directory=some directory

Don't remove the [BACKUP] header, just the line that specifies the backup directory. Without this line, the backup will default to the working directory. Storing your backup on the same physical device as your data leaves you exposed to the failure of that single device, so you should consider an external backup mechanism if you use this configuration.

D) The Windows shortcut you use to run GenSmarts in this "multiple directories" configuration, needs to specify the working directory where the two .CSV files can be found. You can create a shortcut by right clicking on an empty space on your Windows desktop, selecting NEW...SHORTCUT.. from the pop up menu. Using the example above, the shortcuts would be as follows:

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Location Of the Item: "C:\Program Files\GenSmarts\GenSmarts.exe"
Name: GenSmarts-My Family

Once the shortcut is created, right click on it, select PROPERTIES, and specify the working directory or "START IN" directory:

START IN: "C:\Genealogy\MyFamily"

Create different shortcuts for each unique directory you will be using.

5.5 How do I set up my Heritage Quest access?

Heritage Quest is typically accessed through a library portal page. In addition to checking the Heritage Quest subscription box in the Tools...Settings...Subscriptions dialog, you'll need to enter the URL where you provide your password or id to access Heritage Quest. When you use the "AVAILABLE ONLINE" button to link to a Heritage Quest lookup, GenSmarts will launch your internet browser to this URL. You should then provide whatever id or password that is required directly to the browser and press enter. When your library portal successfully processes your login, GenSmarts will detect it and advance the browser into the Heritage Quest site and provide the input for your lookup. This only works when using SmartLink/Search - the Browse variant of the Available Online button will simply bring up your login page and let you take control from there.

You should leave this browser window open as GenSmarts will reuse it for future lookups and will not have to require you to sign on again.

Here are some examples of different libraries Heritage Quest access URLs:

For access of Heritage Quest access through the Godfrey Library, then you'd specify the following value for the "Enter Your Libraries Heritage Quest Access Page Below":

http://gdml-agent.auto-graphics.com/agent/login.asp?cid=gdml&lid=gdml

For Dodge/Jefferson Counties (Wisconsin) Genealogical Society Library, the URL is:

http://www.dodgejeffgen.com/HeritageQuestPassword.htm

A note on Godfrey... at the time of this writing (January 2004), Godfrey's access to Heritage Quest spawns a separate window upon login, that often covers up the window being used by SmartLink/Search. Simply move that extra window aside (or close it) to reveal the window you'll likely want to work with.

Also regarding the access code/bar code/library card number you need to access through the library... GenSmarts won't type it in for you. What happens is that when you click AVAILABLE ONLINE it will pop the Library/Heritage Quest window where you're prompted for the code... GenSmarts then watches that window and when it senses that you've successfully logged in it will take you to the record. If you leave that window open when you're done with that search... on your next search GenSmarts knows that you've already signed in and will proceed ahead to the record.

5.6 How do I get GenSmarts to recognize city names that don't have a country, state or county specified?

GenSmarts has a feature which allows you to replace abbreviations you may have used in your file with more fully specified place names. You can use this feature to equate common cities in your file where you may not have fully specified the place name.

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To make use of this feature, use Windows NOTEPAD.EXE to create the file "placePhrases.txt" in the GenSmarts program directory (typically C:\PROGRAM FILES\GENSMARTS). In this file, use the equals sign ('=') to equate the abbreviation with what you'd like it to be expanded to.

A typical usage for this might be with larger cities, such as London, Paris, Rome, etc. where you may have simply listed the city, because it's obvious to you where the place is. Since there are so many cities in the world that share the same name, GenSmarts doesn't attempt to resolve a place name that contains only a city (e.g. there's not county, state/parish/district, or country specified). Using the "placePhrases.txt" file allows you to tell GenSmarts more specifically what you're assuming about those city names, without having to change your file. Another usage might be with city names that are so prevalent in your data that you simply have developed your own shorthand for those places.

Here's an example of the lines that you'd find in the "placePhrases.txt" file, if you wanted to expand the larger cities in the UK:

London=London, England
Birmingham=Birmingham, England
Leeds=Leeds, England
Glasgow=Glasgow, Scotland
Sheffield=Sheffield, Yorkshire, England
Bardford=Bardford, Yorkshire, England
Liverpool=Liverpool, England
Edinburgh=Edinburgh, Scotland
Manchester=Manchester, England
Bristol=Bristol, England

Here are some rules associated with how this substitution works:

Rule 1) The shorthand, abbreviation, or city name (the part before the '=') must not contain a comma. What you're equating it to may include commas and any other characters that are allowed in a place name. The equated place name can be as general or specific as you'd like.

Rule 2) As GenSmarts is reading your file, only the last element of the source place name from your file will be equated to the corresponding phrase.

To illustrate, here's a list of place names and the values GenSmarts would interpret, use the above "placePhrases.txt" file that specifies larger UK cities:

Example 1) If you had a place name of "London" in your file, GenSmarts would substitute "London, England" instead.

Example 2) If you had a place name of "London I Think" in your file, GenSmarts would not make any substitutions since the phrase "London I Think" does not exactly match "London".

Example 3) If you had a place name of "London, Kentucky", GenSmarts will not make any substitutions because the place name contains a comma. GenSmarts will resolve this to a place in the USA.

5.7 How do I exclude items from the data cleanup place names list?

If you the place is showing up in the list simply because it's not in the GenSmarts geography database, you might want to add it to your custom geography - see this topic for information on accomplish this. Otherwise, see below for how to simply mark something on the list, so you know to ignore it in the future.

If you "right click" with your mouse on a list item in the data cleanup tab, place names sub-tab... you'll see an option to EXCLUDE that item. Selecting this will mark this item, and any other item with this same place name in the list with an X. The purpose for this is to provide a way of marking things in the

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list to indicate that you've investigated them - a way of "crossing them off" the list.

To "reset" an excluded item (e.g. remove the EXCLUDED mark) simply EXCLUDE it again - it works like an on and off switch.

Currently, the items remain in the display, but with the excluded mark. Future versions will add the ability to remove them from the display as well.

These items are stored in a file called "ExcludedPlaceNames.txt", which is stored in the working directory, typically (c:\program files\GenSmarts). These marks will be applied to all files you load. This file can be edited with Windows notepad.exe or similar text editor - each line contains the name of place to be excluded.

The "match" is an exact character for character one - so excluding a place called "Lower East Side" from the cleanup would not also exclude a place name called "East Side".

Excluding a place has no effect on the suggestions generated by GenSmarts - it simply places a mark in the cleanup display so as to give you the ability to note that you've investigated a place name and don't need to look at it further. Future versions may add the ability to add unrecognized place names to GenSmarts geography database.

5.8 Why won't GenSmarts launch my internet browser?

With the exception of AVAILABLE ONLINE, when GenSmarts launches a web page for you, it does so by simply having Windows open the web address (URL). Windows then invokes your default browser to that address. If nothing is happening when you try to have GenSmarts invoke a web page, it's probably because your Windows settings don't have a default browser specified. This can happen when you install/uninstall different browsers and even when you switch between internet providers that install/uninstall special software for you.

Most browsers have a setting for you to indicate that you want that browser as your default. If you're having a problem launching web pages, it can usually be remedied by simply enabling your browser to be the default. Here are some instructions for a couple of the most popular browsers (other browsers will also have similar settings).

To set up AOL as your default browser

Click **Settings** on the AOL toolbar.
Click **A-Z**.
Click **AOL as Default.**
Click **OK** to select America Online as your preferred application for Web browsing

To set up Internet Explorer as your default browser

Right click the **Internet Explorer** icon on your desktop.
Click **Properties**.
From the **Programs** tab, click to select **Internet Explorer should check to see whether it is the default browser**.
Click **Apply**
Click **OK**
Now open **Internet Explorer** by clicking on the **Internet Explorer** icon on your desktop
You should be prompted if you'd like to make Internet Explorer your default...

AVAILABLE ONLINE's SMARTSEARCH and SMARTLINK work directly with Internet Explorer, regardless of your default browser settings. BROWSE will use the default browser. If for some reason you'd like to use another browser, which isn't your default, see the
Internet Settings tab of GenSmarts TOOLS...SETTINGS...

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