

GenScribe Manual

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Introduction

What is GenScribe?

GenScribe is a family history research tracking and record keeping program, designed to help you plan and manage your genealogical research.

You can use GenScribe to:

- Create research "to do" lists for any given venue. You can order these by priority, status, and/or source.
- Record the actual research data that you find (GenScribe includes standard text entry fields as well as templates for the 1790-1880 and 1900-1930 U.S. censuses).
- Manage genealogy projects, including linked subprojects.
- Review research that you've done in any given source, or on any given project.
- Review research that you may wish to incorporate into a lineage-linked database.
- Keep track of your genealogy correspondence, including dates of correspondence and money that you've paid for research or to cover costs.
- Keep track of page-by-page searches for specific references in unindexed materials.
- Assign file numbers to specific research items and print cover sheets that can help you quickly locate hard copies.

System Requirements

GenScribe is available for the Macintosh. System requirements are:

- Power Macintosh or Mac OS computer with a PPC 601 processor or higher.
- At least 16 MB of RAM.
- At least 15 MB of free hard disk space.
- OS 8.1 or later .

Shareware Terms

You may take as long as you like to decide whether to buy GenScribe. However, I will begin to periodically remind you after you have used it a certain number of times without registering, and these reminders will become more frequent over time. Of course, once you've paid for and registered GenScribe, I will never remind you again! And upgrades are free to registered users.

There are two ways to pay for GenScribe:

- Via Kagi online ordering at <https://order.kagi.com/?42G>. Use this method if you are comfortable with online purchasing. Please note that your credit card number is transmitted securely.
- Via the Register application which is bundled with GenScribe. Use this method if you would rather pay by check or money order, or if you want to pay by credit card but not over the internet. Please note that this method also directs payment through Kagi.

Distribution

GenScribe may be freely distributed as long as the integrity of the complete file package described above under "GenScribe Folder" is maintained.

Technical Support

Please direct questions to me at ps Sherman@ma.ultranet.com. I will do my best to answer all questions quickly and thoroughly!

More Information

Please visit the GenScribe Home Page at <http://www.ultranet.com/~psherman/genscribe.html> for news on updates and enhancements to GenScribe.

You may also contact me via mail:

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Getting Started

Introduction

There are a few things to be aware of when you first use GenScribe. Please read the information below before beginning. Additional information is available throughout this manual, and GenScribe Help (including screen examples) is available by clicking the help button that appears in most GenScribe windows.

GenScribe Folder Contents

After downloading and decompressing GenScribe, you will have a single folder, which should contain the following:

- **GenScribe Files** (folder). The main GenScribe program is located within this folder, along with five data files and one help file. *Please note that these seven files must always remain in this folder!* The files are:
 - GenScribe. This is the actual program file.
 - Research.
 - Projects.
 - Sources.
 - Venues.
 - Correspondents.
 - GenScribe Help.
- **GenScribe License**. Please note the importance of reading this document before using and certainly before registering GenScribe.
- **GenScribe Manual**. This contains basic documentation and instructions for using GenScribe.
- **GenScribe Read Me**. For those who want the skinny up front, this is essentially the first chapter of the manual in a standalone format.
- **GenScribe Version History**. This contains a log of all changes made to the program from version to version.
- **Getting Started With GenScribe**. A standalone version of this chapter.
- **Register**. This small program allows you to print out a registration form for sending payment via mail to Kagi. You will not need this if you are registering online.
- **Upgrading to GenScribe 1.1**. This contains specific directions to use for importing your existing GenScribe files into the most recent version.

You may place the GenScribe Folder anywhere you like on your hard drive, and you may rename it. *However, the seven files located within the GenScribe Files subfolder must always remain in this folder, and they may not be renamed.*

If you want to open GenScribe without having to navigate to the GenScribe Files folder, please consider making an alias to the GenScribe program file. You can place the alias anywhere you want (e.g., on your desktop or in your Apple menu) and you can change the default alias name to anything you like for easy recognition. To make an alias to GenScribe, select the GenScribe program file (not the folder) and click Cmd-M. You can then rename and/or relocate the file using standard Finder procedures.

File Sets - One or Many?

GenScribe has been designed to contain all of your research data in one set of files. You can record research for an unlimited number of projects, sources, venues, and correspondents in one place, and track them all separately.

If you still think you may prefer to have separate GenScribe file sets for different purposes, however, the best course is to make a copy of the GenScribe Files folder before you begin to use the program. To do this, select the GenScribe Files folder and click Cmd-D to make a copy of the folder (all of the enclosed files will also be copied into the new folder). You can move and/or rename this new folder as you wish.

Using GenScribe The First Time

When you launch GenScribe for the first time, the Welcome screen will appear. You can consider this the "home page" for GenScribe. Although most of the research functions are also available when viewing research lists and detail screens, this is the most convenient place from which to open lists of correspondence, projects, sources, venues, and correspondents. If you use GenScribe to keep track of your paper files, the function for printing file lists is available here as well.

Please note that the research file is empty to begin with. Some functions will be unavailable until you have begun to add research records. If you choose a function that is unavailable, you will be notified and returned to the Welcome screen.

GenScribe does include one project (“Any”), 16 sources (“Any” and “Correspondence”, plus 14 censuses), and one correspondent (“George Bailey”). The project and the sources may not be deleted (they are critical to the proper functioning of the program). George may be deleted as long as you have created at least one correspondent of your own (i.e., there must always be at least one correspondent).

I have also included a few venues. There must always be at least one venue, but outside of that, you may delete any of those that I have included as you wish. Perhaps at some point, though, these may be places you will actually visit! You can guess that I live in New England from the bias toward Massachusetts and Rhode Island venues. In particular, I could not resist a plug for the Eldredge Library in Chatham, Mass. If Cape Cod is ever a vacation destination for you, this small gem has a great genealogy collection (not just New England material, either), and it’s right on Main St. in the middle of town. So while the rest of your family is shopping and people-watching outside, you can sneak away for some research!

Basic Record Navigation Tips

Introduction

In most respects you will (I hope) find GenScribe easy to navigate. The tips below are provided in order to make sure that you are aware of alternative methods of data entry and text manipulation.

Keyboard vs. Mouse

All of the steps directly connected with editing the content of records in GenScribe can be performed interchangeably with the keyboard or the mouse. Even pop-up menus, in many programs a mouse-only function, may be opened with the <tab> key and navigated using the <up> or <down> keys on the keyboard. Selections within pop-up menus can be made using the <enter> or <return> keys. (More details for specific situations are given at the appropriate locations further within the manual.) And, of course, any or all of these steps can be performed using the mouse.

GenScribe relies upon clickable buttons for most of the activities that you can choose. The eight most common of these are available in the Activities menu and may be activated using the command key along with one of the numbers 1-8. The activities that are available this way are:

- Venue Worklist (Cmd-1).
- Lineage Worklist (Cmd-2).
- Review Project (Cmd-3).
- Review Source (Cmd-4).
- Review Correspondence (Cmd-5).
- Custom Search (Cmd-6).
- New Record (Cmd-7).
- Home Page (Cmd-8).

The Activities menu also includes five additional items:

- Save a Copy (Cmd-9). This is available in case you should ever need to recover a damaged GenScribe file.
- Quit (Cmd-0).
- Add Current Record to Index. See the section "Index Record View" in the chapter "Working With Research Records" for information on how to use this command.
- Prepare Records for Upgrade. See the chapter "Upgrading GenScribe Records" for information on how to use this command.
- Import Records from Earlier Version. See the chapter "Upgrading GenScribe Records" for information on how to use this command.

Menus and Menu Commands

Because GenScribe has been compiled using the FileMaker Pro Runtime Database Engine, many of the standard FileMaker menu names and commands will be visible but grayed out. Specifically, the Records menu is completely grayed out, and only the Quit command is available from the File menu. You might be alarmed to see, for instance, that you cannot create a new record from the Records menu. Please note, though, that this command is available in the Activities menu, and many of the menu commands that are unavailable are likewise available in other ways as needed within GenScribe.

Field Types

There are two types of field that accept data entry:

- Text entry fields, which accept data from the keyboard as in a word processor or spreadsheet. When you enter one of these fields, in most cases the cursor will be placed at the end of any length of text that already occupies the field (in a few cases where it makes sense to do so, all existing text is selected instead). Here are some additional tips for these fields:
 - To select a word, double-click it.
 - To select a line of text, triple-click anywhere along it.
 - To select the entire field, quadruple-click anywhere within it.
 - To move to the beginning of a selected block of text, press the left arrow key.
 - To move to the end of a selected block of text, press the right arrow key.
- Pop-up menu fields, which accept commands from the keyboard or the mouse. When you tab into or click in one of these

fields, the menu will appear and you can make your choice by scrolling down the list using the down key or using the scroll bar with your mouse.

Editing Records

Records may be edited when you are viewing them in detail. If you try to edit a record which you are viewing in a list, the detail will be opened for you.

When you first open a given record, the entire body is shaded in green. When you begin editing, the fields that you can edit will turn white. This is a visual cue that you are editing.

To edit using the keyboard, press tab to place the cursor in the first field of the record (usually this is the "Seeking" field). When you are done adding or editing your text within this field, press <tab> to move to the next field, and so on. To move backwards through fields, press <shift-tab> (i.e., the shift and tab keys at the same time). When you have finished editing, press <enter> or <return>.

To edit using the mouse, simply click within the area of the field in which you wish to place the cursor. When you have finished editing, simply click in the header or any marginal area outside a field.

All detail views within research records contain two "hidden" fields in the Action section. If you look to the right of the "Status" and "Lineage" fields when in editing mode, you will see their outlines. These fields were designed with the idea that they could hold additional information or comments on the status of a search (e.g., if the record needs follow up, why it does) or on the effort to tie it into your lineage (e.g., you think it might pertain to your ancestor, but you're not sure). In truth, you can use these fields for anything you want, or not use them at all.

All detail views within research records also contain a hidden button. This is for toggling High Priority, and it is located in the top right corner of the Search section. Click in this area to make the "•" appear (which indicates High Priority); click again on the "•" to remove it.

Creating New Research Records

Introduction

When you click the New Record button (available in almost every view), you will be presented with a Project and Source Setup window.

Choosing Projects and Sources

All records must have a project and source (except for correspondence; see below). For new records, both of these are pre-set to the defaults “Any”, but you can change this by selecting the correct project and the correct source from drop-down lists. When you first see the Project and Source Setup window, the Project drop-down list is displayed. There are two ways to choose a project from this list:

- Using the mouse, click once on the project of your choice, scroll down (or up) the list if necessary), then click “OK”.
- Using the keyboard, scroll down (or up) the list using the appropriate arrow key until the project of your choice is highlighted. Press enter (or return) to place the highlighted project in the selection window above the list. Press enter (or return) again to confirm your selection. (You can jump down the list by typing the first letter of the project’s name, which will take you to the first entry that begins with that letter. You can then fine tune your choice from there, if necessary.)

After choosing your project, the Source drop-down list will be displayed and you can choose a source using either of the above methods.

A limitation of the Project and Source Setup window is that you will not receive visual confirmation of the project or source you have chosen. For instance, after you move to the “Choose Source” section, you will see only a cursor in the project selection box; the name of the project you’ve chosen will not appear. This is a cosmetic shortcoming only. When you proceed to the New Record detail view, the project and source names *will* correctly appear.

Note on New Correspondence: Correspondence records by definition do not have a separate source (in other words, the correspondence *is* the source). When you create new correspondence, you will be shown a smaller Project Setup window. This functions in exactly the same way as the full Project and Source Setup window, except of course that it is missing the “Choose Source” section.

You may create a new project or a new source from the setup window by clicking either the New Project or New Source icon which appears beneath the appropriate pop-up list. This will take you to a New Project or New Source detail view. Once you have added all the data you wish for your new project or new source, clicking the “OK” button will return you to the Project and Source Setup window and the new project or new source will be placed into the selection box for you to confirm.

Setting High Priority

Click the High Priority checkbox to assign priority to your new record. Priority records are indicated in detail views by a “•” in the top right corner of the Search section. Most list views also include a column (titled “P”) for indicating priority; lists can be sorted with priority records at the top by clicking on the column title.

When you are first shown the New Record detail view, the cursor will blink in the "Seeking" field, ready for you to begin entering data. To move forward from field to field as you enter data, press <tab> (press <shift-tab> to move backward), or use the mouse to click directly within any field into which you want to place the cursor.

For more information on how to use the fields in a research record, see the next chapter, "Working With Research Records".

Working With Research Records

Introduction

The research record is where you enter information on what and/or whom you are seeking, where you are looking, why you are looking, how you are looking, and what you have found.

In order to view an existing research record, you will first want to create a worklist or review list that would include the record (see the next chapter, "Research Lists" for more information on creating lists); you can then open the record by clicking the appropriate row in the list.

The Record Header

The header for a research record contains:

- Buttons for the most common activities and functions, including a button that will return you to the list view.
- Two arrow buttons that allow you to move back and forth among the records in the current worklist or review list without having to return to the list view.
- Two counters: One shows the number of records in the current worklist or review list; the other shows which of the records is currently being viewed.
- A printer button that allows you to print a copy of the current record.
- A trash can button that allows you to delete the current record. (You will be prompted to confirm that this is really what you want to do. Be careful: deleted records cannot be recovered!)
- A help button that opens GenScribe Help for working with research records (GenScribe Help includes screen samples that illustrate some of the less obvious aspects of the record view).

The Record Body

The body of the research record view contains four sections:

1. **Search.** In this section you can record information on what you are looking for and what you have found. After the first time you enter text in the Results field, the current date will be appended so that you can have a record of when you did your research. If you later edit the text in the Results field and want to update the date, you can change it manually, or select it and type Cmd-- (i.e., Cmd-hyphen) to replace it with the new current date.

The project name is also displayed in this section. You can change the project by clicking on the name, which brings up a Project & Source Setup window. (See the chapter "Creating New Research Records" for information on how to use the Project and Source Setup window.)

You can view detailed information about the project by clicking the icon to the left of the project name.

You can set priority for the current record by clicking in the top right corner of this section. A small dot will appear which identifies the record as high priority. Clicking on the dot will remove it. (Most list views include a Priority column at the far right; clicking the "P" at the top of this column will sort all priority records to the top of the list. Venue Worklists and Lineage Worklists are automatically sorted with priority records at the top.)

2a. **Source.** This is the default name for this section, but if you are viewing correspondence, it will change (see 2b. below). The source name is displayed here. In the Citation field you can record the citation or reference within the source (such as volume and page no., microfilm no., etc.).

You can change the source by clicking on the name, which brings up a Project & Source Setup window. (See the chapter "Creating New Research Records" for information on how to use the Project and Source Setup window.)

You can view detailed information about the source by clicking the icon to the left of the source name.

2b. **Correspondence.** This replaces the Source section when you are viewing correspondence. The correspondent's name is displayed here. You can also record:

- The form of correspondence (e.g., e-mail or snail mail). The choices available will appear in a pop-up list.
- The date sent.
- Any amount you enclosed as payment or to cover your correspondent's costs.

You can change the correspondent by clicking on their name to bring up a pop-up list from which to choose, and you can view detailed information about your correspondent by clicking on the icon that appears to the left of their name.

3. **Status.** In this section you can record the following:

- **ACTION:** The action taken (e.g., whether you photocopied a page from a book, transcribed a document, extracted a record, etc.). The choices available will appear in a pop-up list.
- **STATUS:** The status of your search (e.g., "New", "In Progress", "Completed"). The choices available will appear in a pop-up list.
- **LINEAGE:** Whether you've entered the results of your search into your lineage-linked database. The choices available ("Entered" or "Not Entered") will appear in a pop-up list.
- **FILE ID:** The file number or code you've assigned to the item (if you have a hard copy and are using GenScribe to keep track of your filing). Note that because different people may have different filing systems, entries in this field are not automatically assigned or formatted. They can include any combination of letters and/or numbers.
- **DESC:** A brief description of the information that will appear in the Detail section of the record (see below). What you enter here will appear after the record type in record printouts as part of the "title" of the report (e.g., ""Record Extract: Marriage Record of Benjamin Sherman and Catharine Wilson"). This field is also included in file list printouts.
- **COMM:** Any other comments you want to make about the status of your search (e.g., details to follow up if necessary).

4. **Detail.** This is the heart of the research record, where you can record the actual data that you've found. One of three display formats will appear here, depending on the type of source:

- Standard view.** The default is a standard text-entry field which serves well for recording excerpts, abstracts, and transcriptions.
- Census view.** If the source is one of the decennial federal censuses, the display will change to mimic the actual census sheet for the appropriate year, thus allowing you to extract a census record directly into your GenScribe file.
- Index view.** If the Citation field in the Source section includes the words "index", "scan", or "search", the display in this pane will change to show a list of all entries within the source that were located either by using an index or by conducting a page-by-page search.

Please note that the correct display format will be chosen for you. The Census Record view will appear automatically if you have selected a Federal census as your source. The Index Record view will appear automatically if you have a citation to an index or page-by-page search. Otherwise, the Standard view will be displayed.

These are described in greater detail below.

Standard View

This is a basic free-form text entry field which serves well for recording excerpts, abstracts, transcriptions, and descriptions. You can create tabulated displays within this field by using <option-tab> to move data into columns (i.e., <option-tab> works like <tab> in a word processor). This is a useful method for extracting data from vital records in a way that faithfully reproduces the original format in which the data was recorded.

Census View

If the source for a given record is any one of the decennial federal censuses from 1790 through 1920 (except for the mostly missing 1890 census), the research record will show a census template into which you can type data as it appears in the actual census record. Press the tab key to move forward through the fields, one line at a time; press shift-tab to move backward.

The column at the far left (titled "L") is for the line number from the census enumeration sheet.

Censuses that contain too many columns to easily display at once continue to the right of the window. You can use the horizontal scroll bar to show the columns that extend off the screen; you can also tab into these columns to show them.

Later census enumerations (1880 and after) asked for a street name, which would be recorded by the census taker at the far left of the census sheet, usually written up the side of the sheet. Since it is not possible in GenScribe to reflect this in the same way, a field labelled "Street" has been added. You will find it to the right of the area in which you enter "header" data from the census

sheet, above the first line of the actual enumeration.

Index Record View

This is a hybrid of a list view and a detail view and is designed to cover situations in which you are using an index to locate references within a source, or are scanning an unindexed source page-by-page in an effort to find pertinent references (in which case you are essentially creating your own index of the references that you seek).

Click on any record in the list to show a detail view (or census detail view, if appropriate) of that record.

There are two main display differences between the Index Record and all other detail views:

- i. The Detail section is itself a list rather than a display of text or census data. If you click on an item in the list, you will be taken to the record for that item.
- ii. There is a small button located to the right of the citation field in the Source section. This button allows you to add a new record that is linked to the Index Record so that it will appear in the list in the Detail section. (Note also that when you are looking at an index record, if you create a new record using the "New Record" button at the top of the page, you will be asked if the new record is for an entry found in the index or via a page-by-page search of the source. Answering "Yes" is the same as clicking the button in the Source pane; answering "No" will allow you to create a new record that is not linked to the index record that you are viewing.)

If you would like to link an existing record to an index record, choose "Add Current Record to Index" from the Activities menu. GenScribe will locate any index records that match your current record's project *and* source. When you select the appropriate index record from the list, you will be shown a detail view of that index record; click "Choose" to confirm the selection. If none of the choices is the one you want, click "Cancel" to return to the Home Page. If no index record matches both project and source, you will be given the option to create one; you can cancel at this point, too, if you wish.

Research Lists

Introduction

There are six types of research list:

- **Venue Worklist.** This is a list of all research to be done at a given venue. A research record will appear in this list when it uses a source that you have assigned to the given venue *and* if the status of the research has not been set to “Completed”. The default sort order is by priority first, then by status, so that high priority items that are in progress or need follow up will appear above lower priority items and new research.
- **Lineage Worklist.** This is a list of all research that has been completed but is awaiting further evaluation. A research record will appear in this list if its status has been set to “Completed” *and* if the Lineage field is empty. The default sort order is by priority first, then by source and citation.
- **Project Review.** This is a list of all research items that have been assigned to a given project. The default sort order is by source and citation.
- **Source Review.** This is a list of all research items that have been assigned to a given source. The default sort order is by citation.
- **Correspondence Review.** This is a list of all correspondence. The default sort order is by addressee and date.
- **Custom List.** This is a list of all research items that meet criteria that you have set (see the chapter "Finding Records" for more information). The default sort order is by source and citation.

List Headers

The header for all list views contains:

- The name of the worklist or review list currently being viewed.
- Buttons for the most common activities and functions, including a button that will return you to the GenScribe home page.
- Two counters: One shows the number of records in the current worklist or review list; the other shows the total number of research records in your GenScribe file.
- A printer button that allows you to print a copy of the current list.
- A trash can button that allows you to delete all research records in the current list. (You will be prompted to confirm that this is really what you want to do. Be careful: deleted records cannot be recovered!)
- A help button that opens GenScribe Help for the type of list being viewed (GenScribe Help includes screen samples that illustrate some of the less obvious aspects of the program).

In the header for the Venue Worklist, Project Review, and Source Review lists, you will also find the name of the respective venue, project, or source that is being viewed, along with an icon appropriate to the view. Click on the icon to see detailed information about the venue, project, or source. (These display features are not included in the Lineage Worklist and Correspondence Review as there is no need for them in those views; nor do they appear in the Custom List, since the variables that can be used to generate this list are too numerous and, well, variable.)

When the Correspondence Review is displayed, the “New Record” button in the bar at the top of the page is changed to a “New Corresp.” button.

To go to the record view for any research item that appears in a list, simply click on the row for that item. To return to the list view from a record view, simply choose “Back to List” from the button row at the top of the research record.

Creating a Venue Worklist

The Venue Worklist shows all open (i.e., new, in progress, or follow up) research records that use a source to which you have assigned a given venue. (Instructions on assigning venues to sources are in the chapter “Working With Sources”.)

For instance, if you have an open research record for “1900 U.S. Census”, and you have assigned “National Archives” as a venue for this source, then when you choose “National Archives” for your Venue Worklist, the open research record will appear in the list. If you update the Status field to “Completed”, the record will be removed from the worklist.

When you click the Venue Worklist button, you will be shown a scrollable list of venues from which to choose. This list will include all of the venues which have active sources.

You can make your choice in one of two ways:

- Using the mouse, click once on the venue of your choice (scroll down the list as necessary), then click “OK”.
- Using the keyboard, scroll down (or up) the list using the appropriate arrow key until the venue of your choice is highlighted. Press <enter> or <return> to place the highlighted venue in the selection window above the list. Press <enter> or <return> again to produce the list. (You can jump down the list by typing the first letter of the venue's name, which will take you to the first entry that begins with that letter. You can then fine tune your choice from there, if necessary.)

The list can be resorted by clicking on any column header to sort on the chosen column.

If GenScribe finds no open records to be researched at the venue, you will see a message to that effect with instructions to choose another venue. When you acknowledge this message, you will be returned to the venue list and can then choose a different venue, or you can choose to cancel and return to the view that was active when you requested the worklist.

Creating a Lineage Worklist

The Lineage Worklist shows all completed, unevaluated research, i.e., all records in which the “Lineage” field is empty.

When you click the Lineage Worklist button, your list will be generated automatically. As you enter the results of your research in your main genealogy database, you can update your GenScribe research records by choosing “Entered” (for research that yielded positive results) or “Not Entered” (for research that yielded negative results or no results) from the pop-up menu in the Lineage field. Each record that you update in this way will be removed from the worklist. If you take no action (for instance, you’re not yet sure whether you want to enter a given record into your main genealogy database), simply leave the Lineage field empty. It will then be included the next time you generate a Lineage Worklist.

The Lineage Worklist is sorted by priority, then by source and citation. You can resort the list by clicking on any column header to sort on the chosen column.

If GenScribe finds no records to place in the Lineage Worklist, you will see a message to that effect. When you acknowledge this message, you will be returned to the view that was active when you requested the worklist.

Creating a Project Review List

When you click the Review Project button, you will be shown a scrollable list of projects from which to choose. This list will include all of the projects you have created.

You can make your choice in one of two ways:

- Using the mouse, click once on the project of your choice (scroll down the list as necessary), then click “OK”.
- Using the keyboard, scroll down (or up) the list using the appropriate arrow key until the project of your choice is highlighted. Press <enter> or <return> to place the highlighted project in the selection window above the list. Press <enter> or <return> again to produce the list. (You can jump down the list by typing the first letter of the project's name, which will take you to the first entry that begins with that letter. You can then fine tune your choice from there, if necessary.)

The default sort order for Project Review lists is by source and citation. The list can be resorted by clicking on any column header to sort on the chosen column.

If GenScribe finds no records, you will see a message to that effect with instructions to choose another project. When you acknowledge this message, you will be returned to the project list and can then choose a different project, or you can choose to cancel and return to the view that was active when you requested the list.

Creating a Source Review List

When you click the Review Source button, you will be shown a scrollable list of sources from which to choose. This list will include all of the sources you have created.

You can make your choice in one of two ways:

- Using the mouse, click once on the source of your choice (scroll down the list as necessary), then click “OK”.

- Using the keyboard, scroll down (or up) the list using the appropriate arrow key until the source of your choice is highlighted. Press <enter> or <return> to place the highlighted source in the selection window above the list. Press <enter> or <return> again to produce the list. (You can jump down the list by typing the first letter of the source's name, which will take you to the first entry that begins with that letter. You can then fine tune your choice from there, if necessary.)

The default sort order for Source Review lists is by citation. The list can be resorted by clicking on any column header to sort on the chosen column.

If GenScribe finds no records, you will see a message to that effect with instructions to choose another source. When you acknowledge this message, you will be returned to the source list and can then choose a different source, or you can choose to cancel and return to the view that was active when you requested the list.

Creating a Correspondence Review List

There are two ways to create a Correspondence Review list:

1. From the Home Page by clicking the Review Corresp. button.
2. From any view by clicking the Review Source button and choosing "Correspondence" as the source. (See above for information on creating Source Review lists.)

The Correspondence Review list is sorted first by correspondent, then by date sent. You can resort the list by clicking on any column header to sort on the chosen column.

If GenScribe finds no records of correspondence, you will see a message to that effect and be given the option to create correspondence. If you choose "No", you will be returned to the view that was active when you requested the Correspondence Review. If you choose "Yes", a new correspondence record will be created.

Creating a Customized List

You can use this function in one of two ways:

1. To create a set of records that would not be covered by one of the standard worklists or review lists. This approach will be assumed if you create a Custom List from the Home Page.
2. To narrow a search within one of these standard lists. In order to use this approach, you would first want to create the worklist or review list, then create a Custom List that is a subset of the currently active list.

When you choose Custom Search from the Home Page, you will be given a Find Request Form window in which you can enter the criteria for your search.

When you choose Custom Search while viewing a list or a research record, you will first be given the option either to search within the already active worklist or review list, or to search all records. For instance, if you are currently displaying a Venue Worklist (or a research record that is part of a Venue Worklist), you will be given the option to search within the worklist. This way, you can shorten a lengthy worklist in order to focus on a particular project, source, or subject of your search (or any combination of these) at the chosen venue. After deciding whether to narrow the existing set or to search all records, you will be given a Find Request Form window in which you can enter the criteria for your search. (Note that some data will already be filled in if you have chosen to narrow your search.)

Be sure to review the next chapter "Finding Records" for detailed information on how to build find requests.

If GenScribe finds no records that match your criteria, you will see a message to that effect and be asked to modify them. When you acknowledge this message, you will be returned to the Find Request Form window, where you can make the needed changes or cancel the search altogether.

Finding Records (Custom Search)

Introduction

While the process for basic searches in GenScribe is pretty intuitive, a basic understanding of the approach used by FileMaker Pro is needed in order to perform advanced finds and to generally get the most out of this feature.

What follows here is a brief overview of how to set up find “requests”, how to arrange multiple requests in a single search, how to specify “and” searches vs. “or” searches, and how to omit records.

A Basic Search

To perform a basic search, click Custom Search, tab into the field that you expect will contain the text you want to find, type the text, and click Perform Find. GenScribe will return a list of all records that contain results according to the terms you’ve specified in your request or requests.

Please note that finds are not case-sensitive!

Finding Words That Begin With . . .

To find words that begin with the same letters, simply type the letters in the search field.

- Example 1: Searching for *smith* returns *smith*, *smithfield*, and *smiths*.

Finding Complete Words

To find a complete word, precede the word with an equal sign (=).

- Example 2: Searching for *=smith* returns *smith*, but not *smithfield* or *smiths*.

Finding Similar Words and Variant Spellings

To search for variant spellings, or to search for words that contain a common string of letters, insert a wildcard where you expect the variation to occur. You can use more than one wildcard in a single word. The wildcards available are:

@. Choose this to find a single-letter spelling variation.

*. Choose this to find a spelling variation of zero or more letters.

Note that when you use a wildcard, the results will only include complete words. (Compare examples 10 and 11 below with example 1 above.)

- Example 3: Searching for *rob@n* returns *robin* and *robyn*.
- Example 4: Searching for *wil*cox* returns *wilcox* and *willcox*.
- Example 5a: Searching for *br@an* returns *brian* and *bryan*, but not *bran*.
- Example 5b: Searching for *br*an* returns *brian* and *bryan*, as well as *bran*.
- Example 6a: Searching for *b@t* returns *bat*, *bet*, *bit*, and *but*, but not *bait*, *beat*, *bent*, or *bunt*.
- Example 6b: Searching for *b*t* returns *bat*, *bet*, *bit*, and *but*, as well as *bait*, *beat*, *bent*, and *bunt* (and many more!)
- Example 7a: Searching for *sh*rman* returns *sherman* and *shearman*.
- Example 7b: Searching for *sh*man* returns *sherman* and *shearman*, plus *shaman* and *shireman*.
- Example 8a: Searching for *sm@th* returns *smith* and *smyth*, but not *smiths*, *smythe*, *smithfield*, or *smythes*.
- Example 8b: Searching for *sm@th@* returns *smiths* and *smythe*, but not *smith* or *smythes*.
- Example 8c: Searching for *sm@th** returns *smith*, *smithfield*, *smiths*, *smyth*, *smythe*, and *smythes*.

Finding Multiple Words

To search for a phrase (for instance, a full name), enclose the phrase in double quotation marks.

- Example 9: Searching for “*Joseph Sisson*” returns *Joseph Sisson*, but not *Sisson*, *Joseph*. (Compare this to example 10a, below.)

To search for two or more words or text strings in the same field, whether or not they are adjacent to each other, simply enter the words. Use the equals sign (=) to limit searches to complete words.

- Example 10a: Searching for *Joseph Sisson* returns *Joseph Sisson* and *Sisson*, *Joseph*.
- Example 10b: Searching for *Jos Siss* returns *Jos Sisson*, *Sisson*, *Jos*, *Joseph Sisson*, and *Sisson*, *Joseph*.
- Example 10c: Searching for *=Jos Siss* returns *Jos Sisson* and *Sisson*, *Jos*, but not *Joseph Sisson* or *Sisson*, *Joseph*.

Finding the Entire Contents of a Field

To search for the entire contents of a field, precede the search string with two equals signs (==).

Finding Empty Fields

To search for all records in which a given field is empty, use the equals sign (=) as your entire search string in the field.

Finding Non-Empty Fields

To search for all records in which a given field is not empty, use the zero-or-more-letters wildcard (*) as your entire search string in the field.

Finding in Pop-Up Fields

To add criteria in fields that use pop-up lists, simply click in the field and make your choice from the list. Because the range of text entered in these fields is limited to the listed choices to begin with, you need not use the equals sign or double quotation marks.

One possible problem you may find: Since the finding works the same in these fields as in standard text fields, the integrity of searches that use the Source or Project field can be compromised if you haven't carefully chosen clearly distinct source and project names. For example, say you have created two sources, one named “R.I. Deaths” and the other named “Deaths in Providence, R.I.” If you are finding records and choose “R.I. Deaths” from the pop-up list in your find request, records for both sources will be returned. This is because the words “R.I.” and “Deaths” appear in both sources. Your options with regard to this are to make sure to name sources with possible duplication in mind (not as hard as it may sound; for instance, I simply renamed “R.I. Deaths” to “R.I. Vital Records - Deaths”, which is arguably a more accurate source name anyway), and/or to use double quotation marks if you believe this problem might arise.

With respect to projects, this limitation can be turned into a feature. By naming a master project, say, “Sherman Research”, and then naming subprojects “Sherman Research: Descendants of Benjamin Sherman”, “Sherman Research: Ancestors of Moses Sherman”, etc., you can construct a find that will include all research in subprojects of a parent project by choosing just the parent project.

Finding Records That Meet Multiple Criteria ("And")

All criteria that are entered in a single find request are cumulative; that is, records will be found that meet all of them.

- Example 11a: In a single find request, searching for "*caleb sherman*" in Seeking and * in File will return all records you have filed that pertain to a Caleb Sherman.
- Example 11b: In a single find request, searching for *=ebenezer* in Seeking and *Briggs Ancestry* in Project will return all records in this project that pertain to Ebenezer Briggs (or anyone named Ebenezer that you have sought as part of this project, perhaps a father-in-law or brother-in-law).

Finding Records That Meet Alternate Criteria ("Or")

Use multiple find requests to search for records that meet one or more criteria but not all of them. You can add a new request by clicking the Add Criteria button in the Find Request Form header.

- Example 12: Searching for "*elizabeth sisson*" in Seeking in one request and "*anne sisson*" in the same field in a second request will return all records in which you were seeking either Elizabeth Sisson or Anne Sisson (including records in which you were seeking both of them).

Finding Records by Mixing Multiple and Alternate Criteria ("And/Or")

You can combine "and" and "or" searches by carefully constructing multiple requests.

- Example 13: Searching for "*elizabeth sisson*" =*birth* in Seeking in one request and "*anne sisson*" =*birth* in the same field in a second request will return all records in which you were specifically seeking birth information for either Elizabeth Sisson or Anne Sisson (including records in which you were seeking both of them). Records that do not contain the word *birth* will be excluded.

Omitting Records

You can find the records that do not meet your criteria by clicking the Omit button, which is located between the Project and Lineage fields on the Find Request Form. (Note: You will not receive any visual confirmation that you have clicked this button.)

- Example 14: To find all records that are not completed, enter *Completed* in the Status field, then click the Omit button. GenScribe will return a list of all records that are new, in progress (including outstanding correspondence), or need follow up.

Omitting Some Records

You can omit some records from a find result by carefully constructing your find requests. Keep in mind that FileMaker Pro, the engine that drives GenScribe, processes find requests in the order they are entered, and this can affect your results.

- Example 15a: To find records in which you are seeking anyone in Portsmouth but specifically not in Portsmouth, NH, enter *=portsmouth* in Seeking in the first request on the Find Request Form. Choose Add Criteria and in the second request enter *nh* in Seeking, then click the Omit button. FileMaker will find all Portsmouth records, then will omit those that include NH, thus leaving you with the records that refer to all Portsmouths other than the one in NH.
- Example 15b: If the order of the find requests is reversed, the results will change. FileMaker will first omit all records that include NH, but will then find all records that include Portsmouth; thus Portsmouth, NH will be included.

A good rule of thumb is to request the records to omit after requesting the records to include.

Working With Projects

Introduction

There are three ways to enter the Projects file for viewing, editing, and adding projects:

1. From the Home Page, choose the Project List button. This takes you to a list of projects, sorted by project number.
2. From any research record view, click the small icon to the left of the project name in the Search section. This takes you to a detail view for that project.
3. From any Project Review list, or from any research record that is being viewed as part of a Project Review, click the small icon to the left of the project's name in the header. This also takes you to a detail view for that project.

Information in the Projects file can be viewed in one of two ways, the list view or the detail view.

List View

The Project List has two parts, the header and the list.

The header contains a button row that includes the following buttons:

- Find Project. Choose this to locate a project or projects that meet criteria that you set.
- Back to Home. Choose this to return to the Home Page.
- New Project. Choose this to add a new project.

If you have used Find Project to create a subset of the full project list, the list name will change to Project List Subset and an extra button, List All Projects, will appear which, when chosen, will return you to a complete list of all the projects in your file.

The header also contains the following icons:

- Print. This allows you to print the project list.
- Help. This opens GenScribe Help for the project list view.

The list has four columns which show the project number, project name, a portion of the project description, and the parent project. The default sort order for the list is by project number. You can sort on any of the other columns by clicking the column header.

Click on any row to open a detail view for the chosen project.

Detail View

The detail view has five parts:

- **Header.** The detail header contains buttons for the following functions:
 - Review Research. Choose this to produce a Project Review in the GenScribe research file. This button will be active only when at least one research record exists (since otherwise there is no research to review!).
 - Create Research. Choose this to create a new research record in the GenScribe research file. The current project will automatically be assigned to the record.
 - Find Project. Choose this to locate a project or projects that meet criteria that you set. (This functions the same as in the list view.)
 - Back to List. Choose this to return to the Project List.
 - New Project. Choose this to add a new project. (This functions the same as in the list view.)

The header also contains the following icons:

- Previous and Next. These allow you to move back and forth between projects without having to return to the list view.
- Print. This allows you to print a copy of the project detail record.
- Trash. This allows you to delete the project (see below for more information on deleting projects).
- Help. This opens GenScribe Help for the project detail view.

The header also displays the number of research records that currently exist for this project.

- **Project Info.** This section contains fields for the project number and the project name. (The project number is assigned

automatically.)

- **Description.** In this section you can enter a description of the project.
- **Parent Project.** In this section you can link the project to a “parent project”. This allows you to associate related projects. For instance, perhaps you have created a project called “Sherman Ancestors” whose purpose is to trace this surname back in your direct line as far as possible. You might wish to break such a large project down into smaller projects that focus on each generation, or perhaps on each geographical area in which your Sherman forebears lived. Or you may find it necessary to research collateral lines in order to produce the evidence needed to further your own direct line. You can create new projects for any or all of these purposes, then link them to your “Sherman Ancestors” project in the Parent Project pane. Each project can only have one parent project. Clicking on the light green bar will take you to the detail view for the parent project, if one has been assigned. Clicking in the space to the left of the light green bar (under "No.") will produce a pop-up list of projects from which you can assign a new parent or change the existing parent.
- **Subprojects.** All projects for which the current project is a parent are displayed here in a scrollable list. There is no limit to the number of subprojects that can be linked to a project. Clicking on the row in the list for any given subproject will produce a detail view for that project.

The date on which the information for the current project was most recently updated appears at the bottom right of the detail view.

Finding Projects

When you click the Find Project button, you will be presented with a Find Request Form, which includes the standard fields from a project detail view. Simply enter the data that you want to find in the appropriate field(s), then click the “Perform Find” button to begin the search. GenScribe will return a list of all projects that match the terms you’ve specified in your request.

Creating a New Project

To create a new project, choose the New Project button, which is available in all views within the Projects file. You can also add a new project directly from the main GenScribe research file when you are creating a new research record, by choosing the New Project icon in the Project & Source Setup window (for more on this, see the chapter "Creating New Research Records").

When you click the New Project button, you will be given an empty detail view in which to enter information about the project.

When you add a new project, please note the following points:

- **Project Numbers.** Unlike source numbers, project numbers are automatically assigned in sequential order. You can change the project number if you like, but you will be warned if you try to select one that has already been assigned.
- **Project Names.** This may seem obvious, but you must assign a project name. You will be reminded if you have not done this.
- **Parent Projects.** You do not have to choose a parent project, but if you want to, you can do so in one of two ways:
 1. Using the mouse, click in the Parent Project No. field (in the area to the left of the light green parent project bar) to produce a pop-up list of existing projects from which you can make your choice.
 2. Using the keyboard, tab from the Description field into the Parent Project No. field, then scroll down the list using the arrow key until your choice is highlighted. Press <enter> or <return> to place the project number of your choice in the field, then press enter or return a second time to place the project name in the parent project bar.
(Note that it is not possible to create a new project when choosing a parent project; however, if you realize you want to assign as a parent a project that you haven’t created yet, simply add that project afterwards, then return to this project and choose your new project from the parent project pop-up list.)
- **Subprojects.** You cannot directly assign subprojects to your new project. To place projects in this list, assign your new project as a parent to each of those that you wish to appear here.

Deleting a Project

To delete a project, choose the small trash can icon in the detail header. If the project is inactive (i.e., there is no associated research), you will be asked to confirm that you want to delete it. If the project is active, you will be asked first to review the research that you've associated with it. You can back out at this point, but if you really wish to delete the project, you will first have to make it inactive. You cannot delete a project that has associated research.

In order to review research in an active project prior to deleting it, you will be shown a list of the associated records. The following button choices will be available to you:

- **Back to Project.** Choose this if you wish to back out.
- **Reassign Records.** Choose this to reassign all the records in the list, in a batch, to a single different project. A project setup window will appear from which you can choose the new project.
- **Delete Records.** Choose this to delete all the records in the list. You will be given a chance to confirm that this is what you want to do.

If you wish to review individual records before proceeding, click on any record in the list. The following button choices will be available in the research record view that appears:

- **Back to List.** Choose this to return to the list of research associated with the project you wish to delete.
- **Reassign Record.** Choose this to reassign the individual record to a different project. A project setup window will appear from which you can choose the new project.
- **Delete Record.** Choose this to delete the individual record. You will be given a chance to confirm that this is what you want to do.

You may also use the previous and next arrows to move back and forth between records without having to return to the list view.

Once all records have been deleted or reassigned to another project, you will then be asked one last time if you wish to delete the project. This will truly be your last chance!

Working With Sources

Introduction

There are three ways to enter the Sources file for viewing, editing, and adding sources:

1. From the Home Page, choose the Source List button. This takes you to a list of sources, sorted by source number.
2. From any research record view, click the small icon to the left of the source name in the Source section. This takes you to a detail view for that source.
3. From any Source Review list, or from any research record that is being viewed as part of a Source Review, click the small icon to the left of the source's name in the header. This also takes you to a detail view for that source.

Information in the Sources file can be viewed in one of two ways, the list view or the detail view.

List View

The Source List has two parts, the header and the list.

The header contains a button row that includes the following buttons:

- Find Source. Choose this to locate a source or sources that meet criteria that you set.
- Back to Home. Choose this to return to the Home Page.
- New Source. Choose this to add a new source.

If you have used Find Source to create a subset of the full source list, the list name will change to Source List Subset and an extra button, List All Sources, will appear which, when chosen, will return you to a complete list of all the sources in your file.

The header also contains the following icons:

- Print. This allows you to print the source list.
- Help. This opens GenScribe Help for the source list view.

The list has three columns which show the source number, source name, and the source type. The default sort order for the list is by source number. You can sort on either of the other columns by clicking the column header.

Click on any row to open a detail view for the chosen source.

Detail View

The detail view has four parts:

- **Header.** The detail header contains buttons for the following functions:
 - Review Research. Choose this to produce a Source Review in the GenScribe research file. This button will be active only when at least one research record exists (since otherwise there is no research to review!).
 - Create Research. Choose this to create a new research record in the GenScribe research file. The current source will automatically be assigned to the record.
 - Find Source. Choose this to locate a source or sources that meet criteria that you set. (This functions the same as in the list view.)
 - Back to List. Choose this to return to the Source List.
 - New Source. Choose this to add a new source. (This functions the same as in the list view.)

The header also contains the following icons:

- Previous and Next. These allow you to move back and forth between sources without having to return to the list view.
- Print. This allows you to print a copy of the source detail record.
- Trash. This allows you to delete the source (see below for more information on deleting sources).
- Help. This opens GenScribe Help for the source detail view.

The header also displays the number of research records that currently exist for this source.

- **Source Info.** This contains fields for the source number, the long and short names, and the source type.
- **Comments.** In this section you can enter your comments about the source.
- **Venue Info.** In this section you can identify up to three venues at which the source is located, along with information on the format and the call number, and comments. (Note: the comments you make here would not be about the source specifically, but rather about the source in relation to the venue. For instance, if you find that the copy of the source at venue x is badly damaged, you could note that here.) The Venue section also includes a small venue icon for each of the three possible entries. When a venue has been assigned, clicking on the icon to the left of the venue name will give you detailed information about the venue.

The date on which the information for the source was most recently updated appears at the bottom right of the detail view.

Finding Sources

When you click the Find Source button, you will be presented with a Find Request Form, which includes the standard fields from a source detail view. Simply enter the data that you want to find in the appropriate field(s), then click the “Perform Find” button to begin the search. GenScribe will return a list of all sources that match the terms you’ve specified in your request.

Creating a New Source

To add a new source, choose the New Source button, which is available in all views within the Sources file. You can also add a new source directly from the main GenScribe research file when you are creating a new research record, by choosing the New Source icon in the Project & Source Setup window (for more on this, see the chapter "Creating New Research Records").

You will be given a detail view in which to enter information about the source.

When you add a new source, please note the following points:

- **Source Numbers.** You must assign your own source number. GenScribe does not do this for you. This allows you to use your own numbering system (for instance, I number my sources in GenScribe to correspond with the source numbers that *are* automatically assigned when I add them to my lineage-linked database). The only limitation is that it must be a whole number.
- **Short Names.** You must assign a short name. This is because it is the short name that is displayed in all other locations within GenScribe. The ability to add a long name is for your convenience in recording complete information about the source. (Note: Many genealogy programs offer structured source fields, which allow the various elements of a complete source entry to be entered into dedicated text blocks. These can then be formatted to produce proper bibliographic form when cited in reports. I have not added structured source fields in GenScribe, since it is not the purpose of this program to produce professional-quality genealogical reports or publications.)
- **Source Types.** There are two ways to choose a source type:
 1. Using the mouse, click in the Source Type field, then click on your choice in the pop-up list that appears.
 2. Using the keyboard, tab into the Source Type field, then scroll down the list using the arrow key until your choice is highlighted. Then press enter or return to place your choice in the field.You can choose a source type from the list that pops-up when you enter this field, or you can add your own source type. When you add your own source type, it is also added to the pop-up list and will in the future appear as an option in the pop-up list.
- **Venues.** To assign a venue for the source, tab into or click inside the first venue name field. This is located in the Venue section under the word “Name” and to the right of the number “1” and the small venue icon. A pop-up list will appear which will allow you to choose from the venues that you have already created. If the venue you wish to assign does not appear in this list, click on the “New Venue” icon at the foot of this section to create a new venue (see the chapter "Venues" for information on creating a new venue). When you return to your new source, the new venue will appear as an option in the pop-up list. (Please note that the new venue will not automatically be placed in the venue name field. This is because GenScribe cannot determine whether this is the first, second, or third venue to be assigned.)

Deleting a Source

To delete a source, choose the small trash can icon in the detail header. If the source is inactive (i.e., there is no associated research), you will be asked to confirm that you want to delete it. If the source is active, you will be asked first to review the research that you've associated with it. You can back out at this point, but if you really wish to delete the source, you will first have to make it inactive. You cannot delete a source that has associated research.

In order to review research in an active source prior to deleting it, you will be shown a list of the associated records. The following button choices will be available to you:

- **Back to Source.** Choose this if you wish to back out.
- **Reassign Records.** Choose this to reassign all the records in the list, in a batch, to a single different source. A source setup window will appear from which you can choose the new source.
- **Delete Records.** Choose this to delete all the records in the list. You will be given a chance to confirm that this is what you want to do.

If you wish to review individual records before proceeding, click on any record in the list. The following button choices will be available in the research record view that appears:

- **Back to List.** Choose this to return to the list of research associated with the source you wish to delete.
- **Reassign Record.** Choose this to reassign the individual record to a different source. A source setup window will appear from which you can choose the new source.
- **Delete Record.** Choose this to delete the individual record. You will be given a chance to confirm that this is what you want to do.

You may also use the previous and next arrows to move back and forth between records without having to return to the list view.

Once all records have been deleted or reassigned to another source, you will then be asked one last time if you wish to delete the source. This will truly be your last chance!

Working With Venues

Introduction

There are two ways to enter the Venues file for viewing, editing, and adding venues:

1. From the Home Page, choose the Venue List button. This takes you to a list of venues, sorted by venue number.
2. From any Venue Worklist list or detail view, click the small icon to the left of the venue's name in the header. This takes you to a detail view for that venue.

Information in the Venues file can be viewed in one of two ways, the list view or the detail view.

List View

The Venue List has two parts, the header and the list.

The header contains a button row that includes the following buttons:

- **Find Venue.** Choose this to locate a venue or venues that meet criteria that you set.
- **Back to Home.** Choose this to return to the Home Page.
- **New Venue.** Choose this to add a new venue.

If you have used Find Venue to create a subset of the full venue list, the list name will change to Venue List Subset and an extra button, List All Venues, will appear which, when chosen, will return you to a complete list of all the venues in your file.

The header also contains the following icons:

- **Print.** This allows you to print the venue list.
- **Help.** This opens GenScribe Help for the venue list view.

The list has five columns which show the venue name, street address, city and state, zip code, and phone number. The default sort order for the list is by venue name. You can sort on any of the other columns by clicking the column header.

Click on any row to open a detail view for the chosen venue.

Detail View

The detail view has three parts:

- **Header.** The detail header contains buttons for the following functions:
 - **Review Research.** Choose this to produce a Venue Worklist in the GenScribe research file. Unlike the project and source files, this button will appear to be active at all times, even if there may be no open research to place in a worklist for a given venue. If you click this button only to find that the venue worklist is empty, you will be shown a message to this effect. When you acknowledge this message, you will be returned to the detail view for the venue in question.
 - **Find Venue.** Choose this to locate a venue or venues that meet criteria that you set. (This functions the same as in the list view.)
 - **Back to List.** Choose this to return to the Venue List.
 - **New Venue.** Choose this to add a new venue. (This functions the same as in the list view.)

The header also contains the following icons:

- **Previous and Next.** These allow you to move back and forth between venues without having to return to the list view.
- **Print.** This allows you to print the detail on the venue for filing.
- **Trash.** This allows you to delete the venue (see below for more information on deleting venues).
- **Help.** This opens GenScribe Help for the venue detail view.

- **Venue Info.** This section contains fields for the venue name, address, city and state, zip code, phone number, web address, e-mail address, and hours of operation.
- **Comments.** In this section you can enter your comments about the venue.

The date on which the information for the venue was most recently updated appears at the bottom right of the detail view.

Finding Venues

When you click the Find Venue button, you will be presented with a Find Request Form, which includes the standard fields from a venue detail view. Simply enter the data that you want to find in the appropriate field(s), then click the “Perform Find” button to begin the search. GenScribe will return a list of all venues that match the terms you’ve specified in your request.

Creating a New Venue

To add a new venue, choose the New Venue button, which is available in all views within the Venues file. You will be given a detail view in which to enter information about the venue. The only information that is required is the venue name.

Deleting a Venue

To delete a venue, choose the small trash can icon in the detail header. If the venue is inactive (i.e., there are no sources associated with it), you will be asked to confirm that you want to delete it. If the venue is active, you will be asked first to review the sources that you’ve associated with it. You can back out at this point, but if you really wish to delete the venue, you will first have to make sure that it is not listed as a repository for any source. You cannot delete a venue that has associated sources.

When you choose to review sources associated with an active venue, prior to deleting the venue, you will be shown the detail of each associated source, in order of source number. The goal is to remove the venue as one of the repositories listed in the Venue Info section of the source record. To do this, simply click on the name of the venue in question to show the pop-up list of venues. You can choose another venue to replace the venue you’re deleting, or you can remove the venue altogether by pressing the backspace or delete key. You would also want to replace or remove any data entered under call number, format, or notes for that venue.

The following button choices (in the header) will also be available to you:

- **Back to Venue.** Choose this to cancel your review and return to the venue detail display.
- **Previous.** Choose this to move backward through the sources associated with the venue. (Note: This button will be dimmed if you are viewing the first source in the group.)
- **Next.** Choose this to move forward through the sources associated with the venue. (Note: This button will be dimmed if you are viewing the last source in the group.)
- **Delete Venue.** Choose this when you have removed the venue from all sources. (Note: This button will be dimmed until you are viewing the only remaining source that is still associated with the venue. It is possible to choose this button even if you have not removed the venue from the last source. If that happens, you will be warned that at least one source remains that is associated with this venue, and you will have to go back and remove the venue from that source.)

Once the venue has been removed from all sources, you will then be asked one last time if you wish to delete the venue. This will truly be your last chance!

Working With Correspondents

Introduction

There are three ways to enter the Correspondents file for viewing, editing, and adding correspondents:

From the Home Page, choose the Addressee List button. This takes you to a list of correspondents, sorted by correspondent number.

From any Correspondence Review detail, click the small icon to the left of the correspondent's name in the Search pane. This takes you to a detail view for that correspondent.

From any Correspondence Review list or detail, click the small icon to the left of the correspondent's name in the header. This also takes you to a detail view for that correspondent.

Information in the Correspondents file can be viewed in one of two ways, the list view or the detail view.

List View

The Addressee List has two parts, the header and the list.

The header contains a button row that includes the following buttons:

- Find Addressee. Choose this to locate a correspondent or correspondents who meet criteria that you set.
- Back to Home. Choose this to return to the Home Page.
- New Addressee. Choose this to add a new correspondent.

If you have narrowed down the list to a subset of one or more correspondents using the Find Addressee button, the list name will change to Addressee List Subset and an extra button, List All Addressees, will appear which, when chosen, will return you to a complete list of all the correspondents in your file.

The header also contains the following icons:

- Print. This allows you to print the list of correspondents.
- Help. This opens GenScribe Help for the addressee list view.

The list has five columns which show the correspondent's name, street address, city and state, zip code, and phone number. The default sort order for the list is by correspondent name. You can sort on any of the other columns by clicking the column header.

Click on any row to open a detail view for that correspondent.

Detail View

The detail view has three parts:

- **Header.** The detail header contains buttons for the following functions:
 - Review Correspondence. Choose this to produce a Correspondence Review in the GenScribe research file. This button will be active only when at least one record for the correspondent exists.
 - Create Correspondence. Choose this to create a new correspondence record in the GenScribe research file. The current correspondent's name will automatically be assigned to the record.
 - Find Addressee. Choose this to locate a correspondent or correspondents who meet criteria that you set. (This functions the same as in the list view.)
 - Back to List. Choose this to return to the Addressee List.
 - New Addressee. Choose this to add a new correspondent. (This functions the same as in the list view.)

The header also contains the following icons:

- Previous and Next. These allow you to move back and forth between correspondents without having to return to the list view.
- Print. This allows you to print the detail on the correspondent for filing.
- Trash. This allows you to delete the correspondent (see below for more information on deleting correspondents).
- Help. This opens online help for the correspondent detail view.

- **Addressee Info.** This section contains fields for the correspondent's name, address, city and state, zip code, phone number, web address, and e-mail address.

- **Comments.** In this section, you can enter any comments you may wish to make about the correspondent.

The date on which the information for the correspondent was most recently updated appears at the bottom right of the detail view.

Finding Correspondents

When you click the Find Addressee button, you will be presented with a Find Request Form, which includes the standard fields from a correspondent detail view. Simply enter the data that you want to find in the appropriate field(s), then click the “Perform Find” button to begin the search. GenScribe will return a list of all correspondents who match the terms you’ve specified in your request.

Creating a New Correspondent

To add a new correspondent, choose the New Addressee button, which is available in all views within the Correspondents file. You will be given a detail view in which to enter information about the correspondent. The only information that is required is their name.

Deleting a Correspondent

To delete a correspondent, choose the small trash can icon in the detail header. If the correspondent is inactive (i.e., there is no associated correspondence), you will be asked to confirm that you want to delete this addressee. If the correspondent is active, you will be asked first to review the records of correspondence with them. You can back out at this point, but if you really wish to delete the correspondent, you will have to make sure that they are inactive. You cannot delete a correspondent for whom you have recorded correspondence.

In order to review activity prior to deleting a correspondent, you will be shown a list of the recorded correspondence. The following button choices will be available to you:

- **Back to Addressee.** Choose this if you wish to back out.
- **Reassign Records.** Choose this to reassign all the records in the list, in a batch, to a different correspondent. A correspondent setup window will appear from which you can choose the new addressee.
- **Delete Records.** Choose this to delete all the records in the list. You will be given a chance to confirm that this is what you want to do.

If you wish to review individual correspondence records before proceeding, click on any record in the list. The following button choices will be available in the correspondence record view that appears:

- **Back to List.** Choose this to return to the list of research associated with the correspondent whom you wish to delete.
- **Reassign Record.** Choose this to reassign the current record to a different correspondent. A correspondent setup window will appear from which you can choose the new addressee.
- **Delete Record.** Choose this to delete the current record. You will be given a chance to confirm that this is what you want to do.

You may also use the previous and next arrows to move back and forth between records without having to return to the list view.

Once all correspondence has been deleted or reassigned to another addressee, you will then be asked one last time if you wish to delete the current correspondent. This will truly be your last chance!

Troubleshooting

Introduction

If you are using GenScribe on a system that meets the requirements set out in the introductory chapter, you should experience no routine problems running the program. The system requirements are:

- Power Macintosh or Mac OS computer with a PPC 601 processor or higher.
- At least 16 MB of RAM.
- At least 15 MB of free hard disk space.
- OS 8.1 or later .

However, should your computer or system operating software freeze or crash while you have GenScribe open, there is a chance that one or more of your files may become damaged. Should this happen to you, please follow the instructions below.

Of course, the best form of prevention for all kinds of data loss is to have a good backup regimen which you follow regularly.

Recovering Damaged Files

Please follow these steps to recover a damaged file.

1. Press Cmd-Option while opening the GenScribe application (not one of the associated files). Keep the keys down until you see the Recover File dialog box.
2. Locate and select the specific GenScribe file that you need to recover, then click the "Open" button. (GenScribe will create a new file, rename the damaged file by adding the word "Old" to its name, and give the original name to the new file.)
3. Once the recovery is complete, open the recovered file and choose "Save a Copy" from the Activities menu. Make sure to select "save a compressed copy" from the pop-up menu of file types, then also make sure that you give the compressed file the same name as the original.

Upgrading GenScribe Records

Introduction

If you wish to import your existing records into a new version of GenScribe, simply follow the directions below.

Preparing Records for Upgrade

Before upgrading to a new version of GenScribe, open your current version and choose "Prepare Records for Upgrade" from the Activities menu. When this process is finished, quit the program and open the new version. Instructions for the next steps appear below.

Importing Records from an Earlier Version

Having prepared your existing records, you can now import them into the new version of GenScribe. Once you've opened the new version, choose "Import Records from (Earlier Version)" from the Activities menu. You will be asked to locate the existing Research file from which you want to import records. Once you have chosen the file, the records will be imported automatically.

When all research records have been imported, you will be asked to choose the Projects file from which to import your project records. You will be asked in turn to choose the Sources, Venues, and Correspondents files from which to import records. You will be notified when the entire process is finished.

(Please note: records may only be imported into an empty GenScribe file set. When upgrading, be sure to import your existing data before entering research into your new files.)

Once all of your records have been imported, you can begin to use them right away in the new version of the program.