

Genbox Family History

User Manual

Updated for Version 3.6.5

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Introduction

Genbox Family History is a complete genealogy software package that will help you organize your research, store your data, enter proper source citations, and produce professional-quality charts and reports that you can preview and modify, then print or publish on the web.

Features

Charts can be saved in Genbox format for later viewing or modification, or in JPEG or PNG format ready for inclusion on web pages. They can be printed on large-format printers or plotters for impressive color wall charts that will be the talk of your next family reunion. Text reports can also be saved in **Rich Text Format** (RTF) or HTML so you can edit them with your own editor or upload them to the web.

Genbox has an attractive, powerful, and flexible user interface.

Data entry boxes are thoughtfully organized onto multi-page tabbed dialog windows. Auto-completion on date and place boxes speeds data entry. A double-click on a selected box is all it takes to jump to associated data on another window or page, and back/forward arrows on the common toolbar will help you navigate among your jump positions. You can also step through your records one at a time, type in a name or ID in the key boxes at the top of most view windows, or set up a filter to quickly find and move between particular records of interest. Window fonts, sizes, and background colors are your preference.

Genbox Family History has an unmatched level of flexibility and control in its production of genealogy charts.

There are eleven pages of options available for controlling the five basic chart types (Ancestor, Descendant, Related, Convergent, Everyone). Multiple "key" individuals can be selected to focus chart production. The number of generations produced, the types of parent-child links to follow, and the kinds of "collateral relatives" off of the direct lines to include can be finely controlled, allowing charts to be produced for specific sections of a genealogy. Layout options include "direction of drop", link alignment, generational alignment, fan chart curved text type, book layout, "unboxed", "names on lines", and more. Styles and content can be assigned according to individual groups, to visually distinguish particular genealogical lines, surnames, key individuals, or any arbitrarily defined group. Styles include fonts for each type of text, box shapes (independently selected for box head and tail), shadows, fills, line styles, and colors. Content for individuals can be any combination of identifiers, attributes, events, pictures, and notes. Content can be independently selected for primary and spouse. Extra flags and icons can be added to further identify groups of individuals. Source citations can be included in the legend. Numerous sizing options provide fine control over chart density, overall shape and size, and margins. Frames can be added to the chart, pictures, title box and legend box, controlling corner shape, fill, shadow, and colors.

The text reports produced by Genbox Family History live up to the standards set by its excellent chart production.

Eleven pages of options are available to help you control the eighteen basic text report types (Ancestor Narrative, Pedigree, Descendant Narrative, Outline Descendant, Family Group, Individual Narrative, Calendar, Individuals, Places, Events, Citations, Sources, Media, Researchers, Correspondence Log, Research Targets, Projects, Lists). Each report type has a number of layout options that make the reports ideal for numerous purposes. Produce everything from a simple data list or table to a multiple-section book with table of contents, unified name and place index, pictures, bibliography, and footnotes or endnotes. Multiple key individuals can be used to control the focus of the report. Fonts, headings, style, and format can be finely controlled. Individual content can be varied according to type of individual.

For the narrative reports, an advanced context handler has the job of identifying and reducing redundancy in the output, to create a more natural text flow. When you have settled on a set of chart or report options that you like, you can name the options set and save it for later use, and even make it a choice on the Charts or Reports menu for the fastest access.

Genbox has a powerful database engine, with full UNICODE support.

Genbox Family History uses the Jet Database Library for its data storage and SQL query functions, the same database library as used by Microsoft Access 2000. Genbox is a fully UNICODE-enabled application. Text

data is stored in UNICODE format. GEDCOM import/export supports UNICODE and UTF-8 character sets. For Windows NT/2000/XP users, UNICODE text data can be entered directly into any text field in the system.

Genbox supports multiple languages.

The date routines, event templates, identifier types, and flag definitions include support for multiple languages. This allows the reports produced by Genbox to be output in different languages, by just changing the preferred output language in preferences. The program itself can now be installed in multiple languages. Future support will include more languages, and translation of the online help as well.

Going beyond the basics, the unique data structure employed by Genbox offers support for previously problematic data relationships between individuals, events, dates, places, and source citations.

Multiple personal names and identifiers, optionally linked to defining events, can be stored for individuals. Accurate relationships between each child and any number of parents can be stored. Any number of event types, attributes, and flags can be defined. Witnesses to events can be stored along with their roles. Places are considered independent data items in their own 6-level hierarchy. Each place can have multiple names, with optional date ranges of validity, yet still be recognized as the same place. Local sites are stored as the sixth level in the place hierarchy. Qualifiers can be applied to dates and places for a larger degree of expression. Source citations are divided into three levels, recognizing that source material is often found within a larger source, which now only needs to be entered once. Event types and source types are supported with a sophisticated template system.

A powerful search system rapidly finds individuals matching your search criteria.

You can define your SQL-powered searches by simply entering the matching values into the boxes on the search dialog. Complex relationships among up to four "logical" individuals can be part of the criteria. Searches can also be saved for future use.

Individuals and other data items can be grouped into named lists which are then available for selection on charts and reports.

This feature provides for some powerful and time-saving capabilities. List members can be defined by direct selection, as the output from a chart production, or as the output from an individual search.

Genbox was designed with the needs of the researcher in mind.

Unlike many other genealogy applications, Genbox is not just for storing your conclusions. It has been designed to support all phases of your genealogy research as well. Not sure which facts are correct? Store both sets! In fact, you can store every scrap of information you find, whether or not it conflicts or agrees with other information already stored. A second-generation approach to organizing data around sources, with a two-level approach of first identifying "personas" from sources and only later grouping them into "composite individuals" has been implemented. Data can be entered in "source lock" mode to rapidly and conveniently enter proper source citations at the time data is entered into the system.

A project objectives hierarchy, research targets table, and a correspondence log are part of the system. Most records support two rich-text notes boxes: one for general notes and one for research notes. Charts and reports allow you to select which types of notes to include.

Share your data with others.

The GEDCOM 5.5 file format is supported for the transfer of data to/from other genealogical software programs. Additional tags have been defined to export the supplemental data types used by Genbox.

Multiple character set standards are supported: ANSI, ANSEL, IBMPC, UNICODE, and UTF-8.

System Capabilities

Genbox Family History uses the Jet Database Library for its data storage and SQL query functions, the same database library as used by Microsoft Access 2000. Text data is stored in UNICODE format.

Maximum Records

Individuals: 2 billion

Individual Names and Identifiers

Number per Individual: unlimited

Maximum character length: 255

Supported Multimedia File Types

Image File Types

BMP	Windows Bitmap
JPG	JPEG (Joint Photographic Experts Group)
PNG	Portable Network Graphics (8 and 24 bit)
GIF	Graphics Interchange Format
PICT	Macintosh PICT File
PCX	PC Paintbrush File
TGA	Targa Image File
EMF	Enhanced Metafile
WMF	Windows Metafile
TIFF	Tagged Image File Format (8 and 24 bit)

Video File Types

AVI	Audio/Video Interleaved File
MOV, QT	QuickTime Movie File
MPG	MPEG (Moving Picture Experts Group)
WMV, WVX	Windows Media File

Audio File Types

AIFF	Audio Interchange File Format
AU, SND	Audio Data File
MID, MIDI	Musical Instrument Digital Interface
MP3, MPGA	MPEG Audio Layer 3
WAV	Wave File Format

System Requirements

Genbox Family History runs under Microsoft Windows 95 or later versions (Windows 98, 2000, Me, NT, XP). A minimum processor speed of 600 Mhz is recommended, with 128 Mbytes of memory or more. Allow 40 Mbytes of hard disk space for the program, with an additional 10 Mbytes for every 1000 people in your database.

You will need to have Microsoft Internet Explorer 4.01 or later installed on your system to use the HTML output option and to view the online help.

Microsoft Word is recommended for editing the reports produced by Genbox.

Installation

Genbox is installed automatically from the CD.

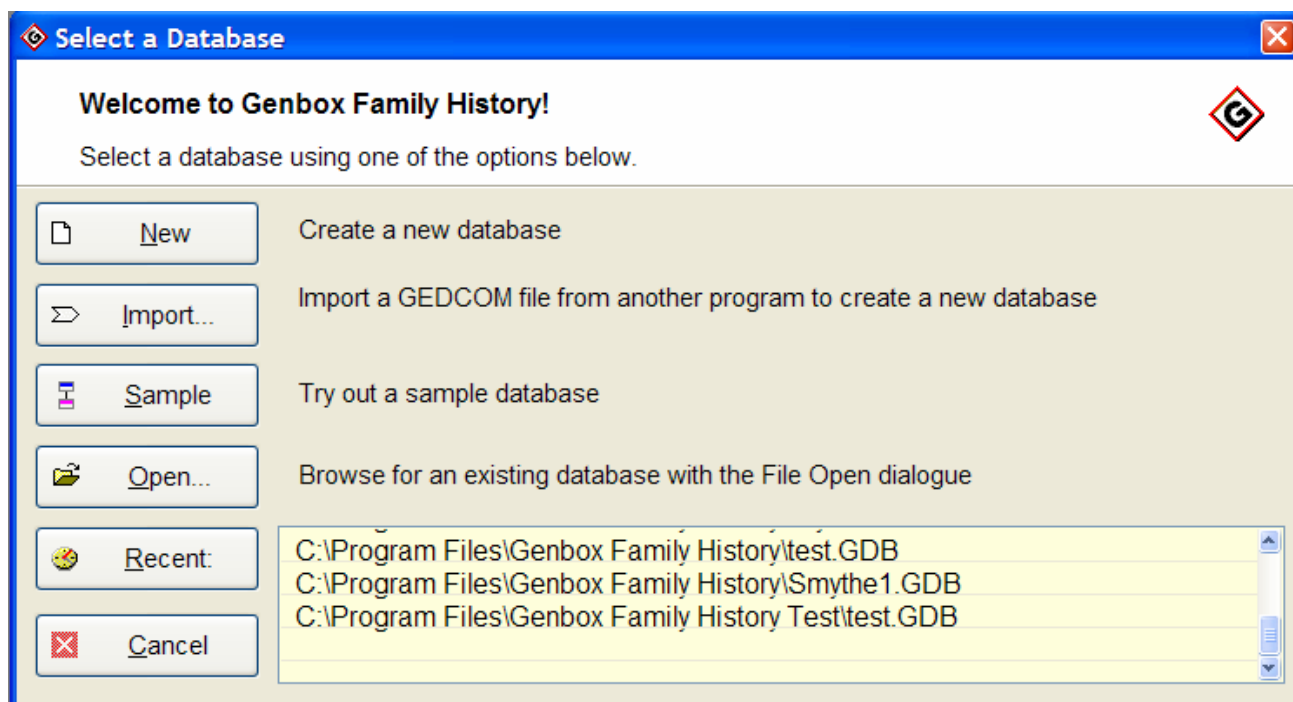
Getting Started

This chapter covers the essentials you need to know in order to get started with Genbox quickly. Genbox supports standard Windows Interface Usage guidelines for menus, mouse operation, window controls, and text entry. It also has additional features that will make data entry and other tasks easier to perform.

Starting Genbox

- To start Genbox, find the **Genbox icon**  on the Windows desktop and double-click it.

The **Genbox Application Window** will open, filling the screen. Beneath the title bar, you will see the [menu bar](#) and the [shared toolbar](#). Across the bottom you will see the [status bar](#). The **workspace** is the large, gray area beneath the toolbar. All data view windows in Genbox will appear in the workspace.



When Genbox starts, it will automatically open the last active Genbox database, showing the [Individuals View](#) in the workspace. If this is the first time Genbox has been run, or if startup preferences have been set not to open the last viewed database, the Database Pick Dialog will appear. With this dialog, you can choose to create a new, blank database, to import a GEDCOM file into a new database, to select a Genbox database from among those recently viewed, or to browse for more files.

Exiting Genbox

- To exit Genbox, on the **File** menu, click **Exit**.

Always exit the program this way, or by clicking on the "X" close box in the top right corner of the main window, to ensure that open databases are closed properly.

Getting Help

Genbox has a complete, online, context-sensitive help system. The **Help Window** will appear when help is selected.

- To get help anywhere, press the **F1** key. This works even when selecting menu options.
- To get help on a particular window, click the **question mark button** on the window title bar.
- To see a table of contents for help topics, on the **Help** menu, click **Contents**.
- To search for help by keyword, on the **Help** menu, click **Index**.
- You can also search for any text in the Help System by clicking the **Search** pane on the Help Window.

Creating a Genbox Database

Before you can use Genbox, you will need to create a Genbox Database. You can create a blank database, ready for you to enter your data, or you can create a database by importing from a GEDCOM data file.

- **To create a new, blank Genbox database**, go to the **File** menu and click [New Database](#). Type a name for your database in the [Open File Dialog](#). The [Individuals View](#) will open. Begin entering data on your first individual by typing their full birth name into the **Name** box. Press the TAB key to advance to the Sex box, and enter "Male" or "Female".
- **To create a Genbox database from a GEDCOM data file**, click Import Data on the File menu, then choose "from GEDCOM file". The File Open Dialog will appear. If you have a GEDCOM file you want to use, you can select it now. When you have selected a GEDCOM file, click the **Open** button on the dialog. The Import File View will appear. Click the **Import to New Database** button. Type a name for your database in the [Open File Dialog](#). After the data has been imported, the [Individuals View](#) will open, showing you the data of the first individual.

Once you have a name entered for the individual, you can choose whatever data you would like to enter next. You can enter the names of parents and children of the current individual on this page. You can click the **Events** tab to display the [Events page](#), where you can enter birth, death, and other event information for the current individual.

Playing with a Sample Database

The quickest way to become familiar with Genbox is to play with a sample database. A sample database allows you to see what the data views look like when filled with data. You can also make charts and reports to see the output capabilities of the program.

Genbox is distributed with a sample GEDCOM file "sample.ged". When you first start Genbox, The Database Selection Dialog will include a "Sample" button. Click this button to open the sample database. The sample database will be initialized with the data imported from the sample.ged GEDCOM file.

Shared Toolbar

The main toolbar is shared by all views: the button operations apply to the active view. Tool tips are available for each of the toolbar buttons: pause the mouse cursor above a toolbar button and its function will be displayed.

Data Views

The underlying database is accessed and updated through **data views**, selectable from the [View menu](#). Multiple views can be open at the same time. Each view displays data from a different main table. The views generally show one main data record at a time--the **current record**.

Header Section

Each view has a **header section**, which identifies the current record for the view by numeric ID and name. The header section usually is shown in a larger font. A different main record can be selected for viewing by typing its ID or name in the header section, or by using the first/previous/next/last buttons on the shared toolbar.

Note: don't try to enter new data into the header fields. Enter data into the labeled text fields below.

Page Tabs

Under the header section is a row of **tabs**. The tabs provide access to **pages** which show subrecords or other information related to the main data record. The label on the tab indicates the type of data represented on the page. To see a page, click its tab. The current page fills the space immediately below the row of tabs. The selected tab and its page are drawn to appear "in front of" the other pages. Clicking the tabs does not affect the display of the header section, which allows you to continue to see the name and ID of the current record while you look at different pages of related data. Sometimes the labels on the tabs will be underlined. This indicates that there has been additional data entered on the indicated page. The underlining tells you whether there is something worth seeing on the page without needing to click its tab.

Entering Text

To enter text into a text box, you first need to select it so that it becomes **current**. The current text box is the one that contains the **insertion point**, which is a flashing vertical bar. The insertion point identifies the point at which typed text will be inserted. You can select a text box by clicking it. Or, you can use the TAB key to step through the text boxes and other data entry controls on a page in sequence, until you reach the text box you want to edit. You can also use SHIFT+TAB to step in the reverse direction. When you use the TAB key to move to a text box, the current contents, if any, will initially be **highlighted** (a different background color). Highlighting indicates the text has been selected. The selected text in a text box will automatically be replaced as soon as you start typing. If you want to keep the existing text in a text box and add to it or edit it, press one of the movement keys first (HOME, END, LEFT ARROW, or RIGHT ARROW) to remove the highlighting.

Adding New Records

New main records can be added by clicking the [New Record toolbar button](#) .

Multiple Subrecords

Many of the pages support multiple subrecords related to the main record. The subrecords may be shown one at a time, with a horizontal scrollbar to select them, as on the [Individual Contact Page](#). Or, they may appear in a list, with each line representing a record, as on the [Individual Identifiers Page](#).

New subrecords on pages that support multiple subrecords can be added in several ways. On some pages, new records can be added by clicking the "star" button found beneath the horizontal scrollbar, as on the [Individual Contact Page](#). Or, new subrecords are added by typing into the blank line at the bottom of a list, as on the [Individual Identifiers Page](#) and on the Children and Event lists on the [Individual Summary Page](#). Some pages allow new records to be added by clicking the "...add" choice from a combo box and then typing the new value, as on the [Individual Parents Page](#) and the [Individual Family Page](#). Clicking the "...add" choice on the [Individual Events Page](#) will bring up a list of all defined event types to choose from for the new record.

Double-Clicking to Jump

In many text boxes, a double-click of the left mouse button will cause a jump to the selected data item's main record. If you click an individual's **Father** text box, for example, you will jump to the individual record for the father. In this case, the Father's record becomes the new current record, and the **Father** box will now be displaying the father of this new individual. Repeated double-clicking the **Father** box will take you to each father in successive jumps, eventually ending on the earliest paternal ancestor recorded.

In like manner, double-clicking the **Place** box on the [Events Page](#) will cause a jump to that place's main record on the [Place View](#). The Place View will automatically be opened, or if already open the current place record will be updated.

Genbox is heavily linked in this manner, making it easy to move between the main data views. The **Back** button on the common toolbar will take you in successive steps to the previous jump locations, and the **Forward** button will then allow you to repeat your forward jumps if desired.

Context-Sensitive Menus

The [main menu bar](#) is shared by all data views. The Edit, Data, and Select menus are context-sensitive; menu options may change according to the current data view, page, and box.

In many text boxes, a click of the right mouse button will bring up an additional [popup menu](#). This menu will have operations that apply to the current text box.

Viewing the Data

Data stored in a Genbox database is easily viewed and modified with the View windows. Viewing and editing are combined: the record currently being viewed may be edited simply by typing the new data into the proper locations.

Opening Views

The underlying database is accessed and updated through views, selectable from the [View menu](#). Each view accesses a different main table. The Views menu is organized into groups of related views. There are five main data views that display genealogy data: **Individuals**, **Places**, **Citations**, **Sources**, and **Media**. There are four data views that are concerned with research: **Researchers**, **Correspondence Log**, **Research Targets**, and **Projects**. The **Lists View** has a unique layout; it displays sortable lists of other records. Three views allow control over customization of the current database: **Event Types**, **Source Types**, and **Data Setup**. Finally, the **Preferences View** allows control over program operation.

- **To open a view**, click its menu option on the [View menu](#). The view will open in a new window on the screen, showing either the first record in the table or the record that had been viewed most recently.
- Multiple views can be open at the same time.

Moving Between Records

The views generally show one main data record at a time--the **current record**. Each view has a **header section**, which identifies the current record for the view by numeric ID and name.

- **To move to a different main record**, type its ID or name in the header section.
- You can also use the first/previous/next/last buttons on the shared toolbar.

Using the Page Tabs

Under the header section is a number of **tabbed pages**, which show subrecords or other information related to the main data record. The label on the tab indicates the type of data represented on the page. The tab of the current page appears "on top". A different page can be selected by clicking its tab. A page may have a scrollbar of its own, indicating multiple subrecords of that type are supported.

Working with Data

Each page has a number of labeled **text boxes**, **check boxes**, and **list boxes**. These boxes display data stored in the database. In general, for each text box there is a corresponding **field** in the current database record, with the same name as the label shown. The text box displays the data that is stored in the record field.

- **To edit data**, type the new text in the text box. Changes are saved automatically.

Jumping to Linked Records

In many text boxes, a double-click of the left mouse button will cause a jump to the selected data item's main record. If you click an individual's **Father** box, for example, you will jump to the individual record for the father. In this case, the Father's record becomes the new current record (and the **Father** box will now be displaying the father of this new individual). Repeated double-clicking the **Father** box will take you to each father in successive jumps, eventually ending on the earliest paternal ancestor recorded.

In like manner, double-clicking the **Place** box on the Events Page will cause a jump to that place's main record on the **Place View**. The **Place View** will automatically be opened, or if already open the current place record will be updated.

In rich text note fields, if you highlight an individual's name or a place name, you can right-click on it and choose "Jump" from the popup-menu to jump to the selected item.

Genbox is heavily linked in this manner, making it easy to move between the main data views. The **Back** button on the common toolbar will take you in successive steps to the previous jump locations, and the **Forward** button will then allow you to repeat your forward jumps if desired.

Record Properties

You can view record properties for the current record on the [Record Properties Dialog](#), including creation date and researcher. It also shows information on the current data table: name, number of records.

- To view the [Record Properties Dialog](#), on the **Edit** menu, click **Record Properties**.
- Click the pushpin image to "pin" this dialog to the screen, so that it remains open while you move between records.

Entering your Information

This chapter describes in detail how to enter data into Genbox. There are five main data views where you can enter genealogy data: **Individuals**, **Places**, **Citations**, **Sources**, and **Media**. Most of your data entry will be on the [Individuals View](#). This view is divided into several tab pages. The Summary page can be used for entering basic information about individuals. More detailed information can be entered on each of the other pages. Think of data entry on the Summary page as a "short cut"; entering basic data on the Summary page is equivalent to entering it on the detail tabs, and when you select one of the detail tabs, you will see that the information you entered on the Summary page also appears there. In general, any information entered on the Summary page could also have been entered on one of the detail pages.

Adding a New Individual


Adding a Related Individual

The best way to add a record for a new related individual is to type the person's name into one of the relationship boxes for an existing individual record: either as the Father, Mother, Spouse, or Child. This allows you to create a record for the new individual and link it to other people in your database at the same time. On the Summary page, you can type a new name into the Father, Mother, Spouse, and children boxes for the current individual. You can also add parents on the Parents page, spouses and children on the Family page, and a variety of types on the Events page. In each case, the program will check the name entered against the names already stored. If there is a match, the Individual Pick Dialog will appear with more information. You can choose to link to an existing individual, or add a new individual, even if the name is exactly the same as an existing one.

If you wish to add additional information to the new individual record added this way, you will first need to make it the current record by double-clicking on the name.

Adding an Unrelated Individual

To add a new, unrelated individual, first check that the [Individuals View](#) is the active view. You may need to click it if another view is active.

On the **Data** menu, click **New Individual**, or click the [New Record](#)  toolbar button. You will see a blank record appear. The text "New" will show in the ID key box.

Entering the Birth Name

Begin by typing the birth name of the new individual into the **Name** box on the [Summary Page](#). Type the name as it would normally appear when written: this is usually given name, middle name, surname, as in "Reginald Edward Smythe". Use normal capitalization.

Press the ENTER or TAB key when you are done. You will notice that the "New" text in the **ID Key** box will be replaced with an automatically-assigned ID value, and the **Name Key** box will automatically update to match the name you entered.

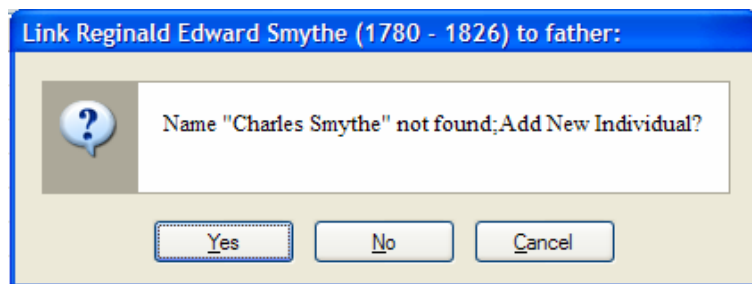
You can edit the birth name on this tab at any time. You will notice that the larger **Name** box will be updated as you type.

Male, Female, Other

Next, enter the sex for the individual: Male, Female, or Other. You can type "M" for male, "F" for female, "O" for other, or select from the drop-down list. Leave it as "Unknown" if there is any doubt. When the correct value is shown, press TAB.

Father

Next, you can type the name of the individual's father in the **Father** text box. When you press ENTER, you may get a message similar to this:



This means the program could find no individual record in the database with the name you typed for the father. Click **Yes** to have the program automatically create a new individual record for the father. When a new individual record is added this way, it will automatically be linked to the current individual.

Confirmation of new individuals can be enabled or disabled on the [Preferences View](#).

Mother

Next, you can type a name for the individual's mother in the **Mother** box. Type her maiden (birth) name, if known.

Events

When a father and mother are both entered on the Summary Page, the program will automatically create a birth event record for the current individual, and link it to the family of the father and mother as the birth parents. You will see a line in the **Event** list box appear with the text "Birth" for Event Type, and blank values for Date and Place.

To enter the date of birth, click the Birth line in the "Date" column. Type the date of birth, such as "3 Aug 1780".

Press TAB to move to the Place column. Type the place of birth, such as "Little Chesterford, Essex, England". When you press TAB again, you will be moved to the Event Type column on the next line, and a drop-down list of event types will be displayed. You can press ESC to close the list. If you want to add additional events for the current individual, use the scrollbar or type the first few letters of the event type to locate the event type desired, then press ENTER.

Linking to an Existing Individual

If the father, mother, spouse, or child of the current individual already has a record in the database, you can link to them by simply typing their name in the blank provided. The [Individual Pick Dialog](#) will appear to display the matching names.

You can also double-click the blank text box to cause the Individual Pick Dialog to appear. You can then select the desired individual for the link.

The Preferred Name

Genbox uses the **preferred** individual name when it needs to refer to an individual by a single name in text boxes and reports. The preferred name is a composite name made up of one or more names selected on the Identifiers Page by placing a checkmark in the "P" column. Genbox will combine the names automatically. If no name has been marked, the first birth name entered will be the preferred name.

The preferred name is **your** preference. Feel free to choose whichever names and identifiers you think would be most helpful in identifying the individual within the program.

The names will be combined with a special arrangement and syntax to help you recognize the name types of the parts:

- **Nicknames** are shown in double quotes.

- **Other** names are shown in parentheses.
- **Suffix Titles** are shown at the end, separated from the rest of the composite name with a comma.
- **Prefix Titles** are shown at the beginning.
- **Alias** names appear with a comma and the word "alias" preceding the name.
- **User ID** values appear in square brackets.

You can follow this convention when entering names for new individuals as well. Genbox will recognize the embedded names and store each in a separate name record for the new individual. For example:

John "Johnny" Smith (Smythe), fisherman of Broad Cove

This name would be stored in four name records, each of a different type:

- Birth name: "John /Smith/"
- Nickname: "Johnny"
- Other name: "/Smythe/"
- Suffix title: "fisherman of Broad Cove"

The **preferred** flag would be set for all names, since they were entered together. The resulting **preferred** name, in this example, matches the text as originally entered, even though the name is now stored in four different records.

If you decide that you don't want to see certain names as part of the preferred name, go to the Identifiers page for the individual and clear the "P" flag next to the undesired names.

Deleting a Spouse

To delete a spouse on the Summary page, select the spouse, then press the DELETE key. If you confirm the action, the link to the spouse will be removed in the family record. Any children will remain linked to the family record, which now has only a link to the current individual. The information on the spouse will remain in the database, but no link from the current individual to the spouse will remain.

If, instead, you choose to delete a family record on the Family page, all family information will be deleted, including family events. The link from the spouse to the current individual will be removed. Any children will no longer be linked to either parent.

Unmarried Couples

If a spouse has been linked to a primary individual, but no marriage event has been entered, Genbox will generate a default sentence of the form "[P] married [S]" on narrative reports. If it is known that the couple did not marry, the MARR_NOT event tag should be used. This generates a sentence of the form "[P] was not married <to [S]>". Or, if you want to indicate that you are not sure if they ever married, use the MARR_UNKN event tag. This generates a sentence of the form "[P] was not known to have married [S]". If you prefer not to show the link between the primary and spouse at all, you can use either the MARR_NOT or MARR_UNKN tag, then set the sentence template to "<>". This will generate a blank sentence, and prevent the default "married" sentence from appearing.

Entering Events

This chapter describes how to enter individual **events** into Genbox. Event records are the "meat" of your genealogical research. They store the dates, places, names, ages, witnesses, and notes for all the events that make up the lives of the people in the database.

Event data is entered on the Individuals View, on four different pages:

- The **Summary page** lists all events for the current individual in a table. You can add events, dates, and places on this page.
- The **Events page** is the main place to enter events data. Detailed information on one event at a time is presented and can be edited.
- The **Family page** lists just the family events for one family at a time. You can add family events, dates, places and children on this page.
- The **Attributes page** indirectly allows editing event records that contain attributes which persist over long periods of time.

Basic event information can be entered on the Summary page: event type, date, and place. Detailed event information can be entered on the Events page, including spouse/child involved, linked name or attribute value, witnesses, and a custom template for formatting the information into sentences for use on narrative reports.

Principals

Genbox supports up to three individuals in each event having **principal roles**.

- **Primary** - the current "focus" individual, or Parent1 for a family event.
- **Spouse** - the other individual in a family event. The "spouse" role does not necessarily mean the couple is married.
- **Child/Other** - either the child of a birth event, or any other individual, possibly unrelated to the other principals.

For a birth event, the principal individuals are the father, mother, and child. For a marriage event, the principal individuals are the primary and spouse. For an association event, the principals are the primary and other individual.

Witnesses

Witnesses are individuals present at an event that do not (usually) fill one of the principal roles (primary, spouse, child/other). You can specify the role that each witness did fill, if any. Any number of witnesses can be associated with each event. At a wedding, the witnesses would include the minister, priest, or judge; groomsmen, bridesmaids, and guests. Witnesses are useful to track because they can provide hints to family relationships or to further research leads. Because they can be people of genealogical interest, witnesses are treated like other individuals. This means witnesses have their own individual record which can be viewed in the Individuals View just like all other individuals.

Witness data can appear in **two different ways** on a report:

- When the current individual is one of the principals for the event, the witnesses for that event can appear as extra detail information.
- When the current individual is a witness for an event, that witnessed event can be included along with other events.

Witnesses to events are entered on the **Events** page, on the **Witnesses List**.

Principals of an event can also be added as witnesses to an event. This can be useful when they serve additional roles, or when you wish to record that a father was physically present at a child's birth.

Entering Witnesses

The name and optionally the role of each witness to an event is added on the **Witnesses List** on the Events page.

The **Witnesses List** has four columns: Name, Role, T (template), and S (source citation).

Witness Name

Type the name of the witness into this box. If this is a new individual name, you will be asked if you would like to create a new individual record.

Witness Role

Each witness can have a **role** in the event. You can type any descriptive name you want here. Some event types have predefined roles, which have their own witness sentence templates. If you type the name of a predefined role, the corresponding template will be the default template for use on reports.

Witness Template

Click on the **Witness Template** check box to open the Witness Template Preview Dialog, where you can customize the default witness template for use with the current event and witness. A check mark in this column indicates that a custom witness template has been defined.

Witness Source Citation

The **Witness Source Citation** button indicates the surety level for the current witness information. Click it to open the [Citations View](#) to enter source citation information. For help, see the chapter [Citing your Sources](#).

Entering Dates

Date boxes have special handling in Genbox. You can enter dates in a number of formats, and Genbox will convert to the standard display format, as selected in Preferences. Genealogical dates are often imprecise--you may not know the day, or the month, or you may be unsure about the year. The approach you should take is to carefully record exactly what you do know, as contained in your source.

- **To enter a simple day-month-year date**, the best approach is to type the day number, the name of the month, and the year, as in **1 March 1986**. You can also type the date with the month before the day, as in **March 1, 1986**.
- Month names can be abbreviated: **3 Feb 1962** will be recognized as **3 February 1962**.
- If the day number is unknown, it can be omitted: **October 1836**.
- If both the day and month are unknown, just a year can be entered: **1836**.
- If the year is unknown, you can still enter what you know, as in "23 May". But when the year is missing, Genbox will add parentheses around the input: **(23 May)**.

Long Dates and Short Dates

In the database, dates are always stored as a number and a text portion. The number stores the year, month, day, and date type. The text portion contains any additional qualifiers, the second date of a range or period date, date flags, and any other text that could not be parsed by Genbox. The actual presentation of the date is controlled by preferences settings, allowing the date to be formatted in different ways. Genbox formats dates using two date formats, depending on where the dates appear throughout the system:

- **Long dates** are used when space is not limited, as on the Events page.
- **Short dates** are used when space is limited, as when dates appear as a column on a list view.

Charts and reports can optionally be set to user either long date or short date formatting. Charts use short dates by default, while most reports use long date formatting by default.

Long and short date format options are set on the [Preferences View](#). You can set the formatting for long and short dates to be exactly the same, or very different, even with different date part orderings.

Note when a month is entered as a number, and the day number is less than 13, as in **2/3/1962**, the ambiguity will be resolved according to the preferences settings for date part order on **short** dates. If ordering is set for Day Month Year, this date will be formatted as **2 March 1962**. If ordering on short dates is set for Month Day Year, this date will be formatted as **3 February 1962**. To avoid this ambiguity, month names should always be used on data entry, rather than month numbers.

Using Date Qualifiers

You can prefix your date with a qualifier. There are several types of date qualifiers that Genbox understands and can use when comparing and sorting dates.

Approximate Dates

To indicate that a date is approximate:

- Use the qualifier **about**, as in **about 1946**.
- You can also use **abt**, **circa**, **cir**, **ca**, and **~** (tilde).

"Before" Dates

When you know the date occurred **before** a known date:

- Use the qualifier **before**, as in **before 1928**.
- You can also use **bef** and **<** (left angle bracket).

"After" Dates

When you know the date occurred **after** a known date:

- Use the qualifier **after**, as in **after 15 May 1929**.
- You can also use **aft** and **>** (right angle bracket).

Estimated Dates

If you know some dates for a individual or immediate relative, you can **estimate** other dates.

To indicate that a date has been **estimated**:

- Use the qualifier **estimated**, as in **estimated 1626**.
- You can also use **est** and **say**.

Some common guidelines used when estimating dates:

- A man marries at age 25.
- A woman marries at age 21.
- A married couple has their first child one year after marriage.
- Subsequent children are born two years apart.

For example: suppose you know a couple married in 1925, and had two children, but don't know any other dates. You could estimate the following:

- The husband was born in 1900.
- The wife was born in 1904.
- The first child was born in 1926.
- The second child was born in 1928.

Another example: suppose you know a man was born in 1812, married, and had one child, but don't have other information. You could estimate:

- His wife was born in 1816.
- They married in 1837.
- Their child was born in 1838.

You can enter these estimated dates into the event records for the individuals, using the **est** qualifier to indicate these dates did not come directly from a source, but were estimated based on other information. Estimated dates are better than no dates, because you can sort events using them, and you have a starting point to begin your search for records.

Calculated Dates

To indicate that a date has been **calculated** from other known dates and ages:

- Use the qualifier **calculated**, as in **calculated 1742**.
- You can also abbreviate this to **calc** or **cal**.

Suppose you have a death certificate that gives the date of death and age at death, but not the birth date. You can calculate the approximate year of birth by subtracting the age from the death date. Another example: suppose you know that in the culture of the individual, a certain religious event always takes place at a particular age. If the date of this event for the individual is known, you can calculate the date of birth.

A calculated date is likely to be more accurate than an estimated date. You will still want to search for primary records that reveal the actual date, and the calculated date should be a good indicator for where to start your search.

Surety Qualifiers

When a **source citation** is added to a date, you can select a **surety level** for the information. Certain surety levels can have **default qualifiers** that indicate the surety level on reports. These default qualifiers can be specified on the [Data Setup View](#), [Defaults page](#). If a custom qualifier has not been specified, the default surety qualifier will be shown. For example:

- For a "Marginal Evidence" surety level: **perhaps 1750**.
- For a "Probable Conclusion" surety level: **probably June 10, 1752**.
- For an "Assemblage of Evidence" surety level: **almost certainly October 12, 1763**.

For both "undecided" and "Convincing Evidence" surety levels, no default surety qualifier is defined.

Custom Qualifiers

You can enter other qualifiers of your choosing. These will be stored and shown as a prefix before the date.

You may wish to enter your own surety qualifier for specific dates, overriding the defaults. For example:

- perhaps 1750; maybe 1750; possibly 1750
- probably 10 June 1752; apparently 10 June 1752; presumably 10 June 1752
- almost certainly 12 October 1763; most likely 12 October 1763
- without a doubt 23 March 1789

You can also add custom qualifiers that help to define the date when the day or month is not known:

- during the spring of 1920
- late winter 1847
- early September 1746
- Christmas 1752
- Sadie Hawkin's Day 1964
- the Ides of March 45 B.C.

Notes:

- The automatic addition of date prepositions "on" and "in" are suppressed whenever a custom qualifier is present.
- Genbox will not interpret custom qualifiers when sorting dates. Only the recognized portion of the date will be used.
- While custom qualifiers can be multiple words, certain punctuation characters cannot be included in the custom qualifier: slash, comma, period, dash, and question mark (/,-,.,-?).

Entering Date Ranges

You should enter a **date range** when you know an event occurred between two dates, but you do not know the precise date.

- **To enter a date range**, use the keywords **between** and **and**, as in **between 10 Aug 1845 and 12 March 1847**.
- You can abbreviate the keywords to "bet" and "&", as in **bet 10 Aug 1845 & 12 March 1847**.
- Or, you can simply use a dash between two dates, as in **10 Aug 1845 - 12 March 1847**.
- If the begin date of the range is unknown, enter only the second date, using the keyword "by", as in **by 12 March 1847**.

A date range is inclusive (the begin and end dates are considered part of the range).

Note If you want to indicate that an event occurred over a span of time, enter a Date Span instead.

Entering Date Spans

You should enter a **date span** to indicate that an event occurred over a continuous span of time. Residency and Employment events often use a date span.

- **To enter a date span**, use the keywords "from" and "to", as in **from 3 March 1927 to 1 June 1929**.
- If the end date of the span is not known, enter only the "from" date: **from 3 March 1927**. You can also use "since": **since 3 March 1927**.
- If the begin date of the span is not known, enter only the "to" date: **to 1 June 1929**. You can also use "until": **until 1 June 1929**.

You can choose to have date spans formatted on reports as simply a dash between the two dates. However, a dash between two dates on data entry will be interpreted as a date range.

Entering Month Names

Genbox recognizes month names used in other calendar systems, in addition to those in the Gregorian calendar. When a month name is recognized from the Republican, Hebrew, or Islamic calendar, the date will be converted to the equivalent Gregorian date for storage and display, and the date will also be preserved in its original calendar format enclosed in parentheses.

Entering Sort Dates

When only a partial date is known, or when the ordering of children's births is known but not the actual dates, a special **sort date** may be entered. You can use sort dates to order events when you know their relative order, but not the actual dates. The sort date is used only for sorting the events into the correct chronological order. Sort dates are displayed inside the program but are omitted on generated charts and reports.

When entering event dates, a **sort date** may be entered by enclosing it in square brackets, as in **[12 April 1858]**.

Sort dates can have alternate text appearing before the first bracket; this text will print on charts and reports. For example, you could enter an event date of "**during the great flood [12 April 1858]**". The full text would appear as entered on the screen, but only the part "during the great flood" would appear on reports.

Additional text can appear inside the brackets after a valid date. This can be used to enter time of day for sorting events occurring on the same day, or for any comments that should be excluded from the output. For example:

shortly after dawn [12 April 1858 10:00]

a little past noon [12 April 1858 12:15]

at dusk [12 April 1858 19:30]

By including times in the sort date brackets, these three dates would sort into the correct order.

Entering Date Part Alternatives

Genbox can accept dates with date part alternatives, like **15/18 Oct 1845**, **March/May 1892**, and **15 Aug 1840/1842**. The single slash means "or" between the two part alternatives given. When a date with a date part alternative is entered, Genbox will automatically add a sort date that contains only the first in the pair of date part alternatives. Thus, if you type **15/18 Oct 1845**, Genbox will format this as "15/18 Oct 1845 [15 Oct 1845]".

A date with a single "or" between a pair of day, month, or year alternatives will also cause a sort date to be automatically generated. This allows dates such as "15 or 18 Oct 1845" to be entered and interpreted correctly.

Entering Special Dates

Genbox recognizes **today**, **tomorrow**, and **yesterday** and will convert them to standard display format.

Unrecognized Date Entry

If Genbox does not understand the last portion of your date entry, it will display the portion it does understand followed by the remainder enclosed in parentheses. This remainder will be stored in the database and also displayed when the date is formatted on charts and reports. This means no portion of your date entry will be lost; you can enter whatever you like for a date value, and Genbox will be able to store it and display it. If you do not understand the date in a source record, you can record it exactly as it appears. However, the unrecognized portion cannot be used when sorting dates.

If Genbox cannot understand any part of your date entry, the entire text will be enclosed in parentheses.

If Genbox does not understand what appears to be the month name, it will generate an error message. This is most likely a typing error. If the entered text is what you intended, enclose the entire date within parentheses to save it.

Some examples with parenthetical parts:

- 14 September 2002 (8 Tishri 5763)
- 10 May 2001 (at least I think so!)
- 30 Aug 1548 (or 1549)

- 2 Jan 1836 (the original says "the second day of the first month...")
- 1746 (Source has Ma..., so month is probably May or March)
- probably in late June, 1928 (or maybe early August)
- (the summer of the great flood)

Calendar Systems

A number of different **calendar systems** have been used since antiquity. Several are in use today. This section provides a summary of the various calendar systems, and describes the calendar system support in Genbox.

The Gregorian Calendar

Today, the **Gregorian calendar** serves as the international standard for civil use. It was introduced in 1582 by Pope Gregory XIII. On the Gregorian calendar, a common year is 365 days in length; a leap year is 366 days, with the extra day in the month of February. Leap years are determined according to the following rule:

- Every year that is exactly divisible by 4 is a leap year, except for years that are exactly divisible by 100, unless these centurial years are also exactly divisible by 400.

This means 1988, 1992, and 1996 were leap years (divisible by 4); 1700, 1800, and 1900 were **not** leap years (divisible by 4, but also divisible by 100 and not divisible by 400); 2000 **was** a leap year (divisible by 4, 100, and 400).

The Gregorian calendar is more accurate than the Julian Calendar, which it replaced. With an average year of 365.2425 days, the error rate (compared to a tropical year of 365.2422 days) is one day in about 2500 years. It was first adopted by most Roman Catholic countries in 1582. Other countries adopted it at various times: Germany in 1700, Great Britain and its colonies in 1752, Russia in 1917-1918.

The Hebrew Calendar

The **Hebrew calendar** is the official calendar of Israel and is used for religious purposes by Jews worldwide. It is a combined solar/lunar calendar, with the complicated goal of keeping its years in sync with the tropical year and its months in sync with the lunar cycle. An ordinary year has 12 months and 353, 354, or 355 days. A leap year has 13 months and 383, 384, or 385 days. Each month starts approximately on the day of a new moon. The first day of the calendar year is 1 Tishri, *Rosh HaShanah*. Years are counted from the new moon that occurred on 6 October 3761 BC.

The Islamic Calendar

The **Islamic calendar** is the official calendar in Saudi Arabia and other countries around the Persian Gulf. Other Muslim countries use the Gregorian calendar for civil purposes and the Islamic calendar for religious purposes. The Islamic calendar is a purely lunar calendar, so it shifts with respect to the seasons and solar calendars. Years are counted since Mohammed's emigration to Medina in 622 AD.

The Republican Calendar

The **Republican**, or **French Revolutionary calendar**, was introduced in France on 24 November 1793 and abolished on 1 January 1806. A year consisted of 365 or 366 days, divided into 12 months of 30 days each, followed by 5 or 6 additional days. Years are counted since the establishment of the first French Republic on 22 September 1792. That day is known as 1 Vendemiaire of the year 1 of the Republic. During the short time the calendar was in use, the years 3, 7, and 11 were leap years.

The Early Roman Calendar

The early Roman calendar was nominally a lunar calendar. The year was 355 days long, with twelve months that varied between 29 and 31 days, with 28 days for February. An extra month was added in some years to bring the calendar back in sync with the seasons. Years were counted **ab urbe condita**, that is, "from the founding of the city" of Rome (1 AUC).

The Julian Calendar

The **Julian calendar** was adopted in 709 AUC (46 BC on the Gregorian calendar) by order of Julius Caesar, to bring order to the calendar and to correct for the discrepancy with the seasons without requiring the extra months. Unlike the earlier Roman calendar, the Julian calendar is truly solar, with 365 or 366 days a year. It also established the lengths of the months we still use today. For the Julian calendar, the leap year rule is simply every year divisible by 4. The average Julian year is thus 365.25 days, or about 11 minutes and 15 seconds too long, an error rate of one day every 128 years.

Adoption of the Gregorian Calendar

The adoption of the Gregorian calendar began in 1582 and continued over a period of 350 years. In 1582, the error in the Julian calendar had accumulated to 10 days. The adoption of the Gregorian calendar in that year initially by Italy, Spain, Portugal, and Poland included skipping 10 days to catch up with the tropical year: October 4, 1582 on the Julian calendar was followed by October 15, 1582 on the Gregorian calendar. By 1752 when Great Britain switched, the error had accumulated to 11 days, so Wednesday, September 2, 1752 in Great Britain and its colonies was followed by Thursday, September 14, 1752.

Old Style Dates

The Gregorian calendar officially designated January 1 as the first day of the year. While the Romans had also used January 1 as the start of the new year, other days were later used, beginning in the seventh century A.D. Standard practice varied depending on the country and sometimes by different groups within a county. In the ninth century, the use of March 25 as the start of the year began in parts of Europe, becoming widespread by the twelfth century. So in the British colonies, March 25 was considered the first day of the new year in the Julian calendar. Thus, dates in January, February, and most of March would have a year one less than otherwise would be expected. George Washington, who was born on 11 Feb 1731 on the Julian calendar, was born on 22 Feb 1732, according to the Gregorian calendar.

Throughout the world, civil practice of celebrating January 1 as the first day of the year sometimes preceded official practice. Even in England, January 1 was used as the start of the year for some purposes before the official adoption of the Gregorian calendar. Years starting on January 1 were called "historical years". The year starting March 25 was called the Civil or Legal Year, although the phrase **Old Style** was more commonly used.

Scotland officially changed to January 1 as the starting day of the year in 1600, 152 years before England. The year 1599 lasted from March 25 until December 31. However, Scotland did not adopt the Gregorian calendar in 1600 - it was not until 1752, along with England, that Scotland adopted the Gregorian calendar with its new leap year rules, and made the correction of eleven days.

Having these two different days for the start of the year causes ambiguity for dates in January, February, and most of March. On historical documents, you may see dates marked "Old Style" or "O.S.". This means the year shown is according to the old system of using March 25 as the first day of the year. Dates marked "New Style" or "N.S." would indicate a starting day of January 1 was used.

Double Dates

More commonly, dates falling January 1 - March 24 in the period from 1582 to 1752 are shown on historical documents as a **double date** to resolve the ambiguity: two year numbers are shown, separated by a slash: the first year is the "Old Style" year; the second number is the "New Style" year, as in "17 January 1729/30". Only the year is doubled. Dates on or after March 25 of each year are not shown with double dates. The use of a double date format implies the date is a Julian calendar date. In the Washington family bible, for example, a double date appears on the entry for the birth of George Washington: "George Washington, Son of Augustine by Mary his Wife was born [on the] 11th Day of February 1731/2 about 10 in the Morning".

Double dates also permit the proper chronological sorting of events. The Old Style date 12 Dec 1741 came **before** the Old Style date 15 Feb 1741. Without the double date format, these dates would not sort correctly in Genbox. When you add the double dates, the dates become 12 Dec 1741 and 15 Feb 1741/42, which do appear in the correct order, because it is the second year of a double date that is used for sorting.

Interpreting Old Style Dates

Because Old Style dates have March 25 as the first day of the year, genealogists have to be careful in their interpretation of dates before 1752:

- The day after December 31, 1733 was January 1, 1733.

- The day after March 24, 1733 was March 25, 1734.
- A John Smith born April 2, 1689 and a William Smith born March 19, 1689 could be brothers, with William nearly a year older than John.
- A child baptized on March 10, 1729 could indeed be the legitimate child of a couple married February 13, 1730, if the baptism date was recorded in Old Style and the marriage date in New Style.

Recording Old Style Dates

Most authorities agree dates should be recorded in the style of the times and places in which they were recorded. That means you should enter Old Style dates when that is what you have, indicating such by using a double date format (only for dates January 1 - March 24) or by adding "(Old Style)" or "(O.S.)" after the date.

Unfortunately, historical documents do not always use double dates or "O.S./N.S." notation, which can make the date ambiguous. What should you do when you are not sure if the date you have is Old Style or New Style? Examine the entire context of the source record carefully. Most records are recorded chronologically. Study the pattern. If the December dates are followed by January dates of the same year, or if March records were followed by April records of the following year, they were most likely recorded in Old Style and you can indicate such in your records.

If you still can't tell for sure, but you have an educated guess, add your guess in parentheses after the entry: 17 Mar 1744 (O.S.?).

Converting Dates

Genbox uses the Gregorian calendar internally for its date operations. You may wish to convert your Old Style dates (and dates of other calendars) to the Gregorian calendar (New Style). When you convert a date, include the date as it originally appeared in the source in parentheses after the converted date, as in "22 Feb 1732 (11 Feb 1731 O.S.)".

Be careful when converting dates. A church christening record for "the 6th day of the third month" may or may not be the 6th of March, depending on the starting day of the year, for example. If you are not sure, enclose the portion of the date that you do not understand in parentheses.

Genbox includes a [Date Converter Tool](#) that can be used to convert dates.

Double Dates in Genbox

Genbox can display dates prior to a specified cut-off year (typically, the year of adoption of the Gregorian calendar in the country of your ancestors) in double date format. Specify the cut-off year on the [Preferences Dates](#) page.

- **To enter a double date**, enter the Old Style year first, followed by a slash, then two digits for the New Style year, as in "3 February 1722/23". This format is only valid for days January 1 - March 24, and for years beginning in 1583.
- **To indicate that a date is in Old Style (Julian) for days March 25 - December 31**, add "(Old Style)" or "(O.S.)" after the date.

You can have Genbox automatically format entered dates in double-date format by selecting "Automatic double dates" on the [Preferences Dates](#) page. Enter the **second** year (New Style) into the date field, and Genbox will automatically add the first (Old Style) year.

Note: If double date format is not used, Genbox will treat the date as a Gregorian date.

Proleptic Calendars

Historians sometimes apply calendar systems to epochs earlier than their adoption, even though people of that time would have used a different system. To indicate this extension, the adjective **proleptic** is sometimes inserted before a calendar name. This allows us to say, for example, that the Julian calendar was adopted in

46 BC, the date on the proleptic Gregorian calendar that is equivalent to the year 709 AUC. The [Date Converter tool](#) will show dates in calendar systems for periods both prior to their adoption and after their discontinuation, with the exception of the Republican calendar.

The proleptic Gregorian calendar is used internally by Genbox for all date information.

BC / AD

The system of numbering years **BC** (Before Christ) and **AD** ("Anno Domini", in the year of Our Lord) was instituted in about 1280 AUC by the Roman abbot Dionysius Exiguus, who reckoned that the Incarnation had occurred on March 25 in the year 754 AUC, with the birth of Jesus occurring nine months later. Thus the year 754 AUC was designated by him as the year 1 A.D., making the current year 527 A.D. This change affected the Julian calendar, which was in use at the time. The Gregorian calendar, which is used today, continues this year numbering system. It is also common practice now to show Julian dates earlier than 527 A.D. using this numbering system as well.

The equivalent terms **BCE** (Before Common Era) and **CE** (Common Era) are sometimes used in place of BC and AD.

Genbox formats dates with a year earlier than 1000 using the selected labels for BC/AD.

Note There is no "year 0" on the proleptic Gregorian and Julian calendars; the year before 1 AD is 1 BC. This means that on the proleptic Gregorian calendar, 1 BC, 5 BC, etc. are leap years.

BC Dates in Genbox

- **To enter a B.C. date**, type the letters "BC" after the year, as in "42 BC".
- You can also indicate a B.C. date by prefixing the date with a minus sign (dash).

Places

Places in Genbox are considered individual data items, which have their own data records, viewable with the [Places View](#). A place can have multiple names defined, its own associated media, notes, and citations.

Place Level Hierarchy

Each place record in Genbox is defined with a **place level**. The six place levels are:

- **Nation/Area** - United States, England, France, North America
- **State/Province** - Ohio, Newfoundland
- **County/Parish** - Hamilton County, Natchitoches Parish, Co. Ulster
- **Township** - Springfield Township, Brighton Twp
- **City/Town** - London, Maysville
- **Local Site** - County Courthouse, Mercy Hospital, National Archives, The Washburn Family Estate

The names on the place levels are meant to be suggestive; City/Town could also include village, hamlet, etc.; County/Parish could also include district. When entering data, look at the place names and decide on a consistent way to divide them into six levels.

Each place record links to a **higher** place record. Local Site links to City/Town; City/Town links to Township; Township links to County/Parish; County/Parish links to State/Province; State/Province links to Nation/Area.

A Local Site can also link to a higher Local Site. This means you can structure your place data with an unlimited number of place name divisions below the City level. The program will treat all these levels as Local Site levels.

A Nation/Area can also link to higher Nation/Area. This allows nations to be grouped by continent. It also allows larger governmental structures to be represented: "England" links to "Great Britain", which links to "United Kingdom", which finally links to "Europe". This extra structure is useful when performing data searches and filtering. On reports, only the first Nation/Area is included in the place names.

Place levels can also be **skipped**: City/Town could link directly to State/Province, for example, skipping both the Township and the County/Parish level. When the data is available, though, place levels should not be skipped.

Because places link to higher places, each place record stores only **one piece** of a full place name. The name stored in a place record is only the name at its level. Consider the place name:

Front Porch, Bob's Antiques, Old Style Village, Antiquity, Goodman Twp., Meigs County, Ohio, United States

This would be stored in Genbox as 8 place records, each linked to a higher record:

- **Front Porch** - local site
- **Bob's Antiques** - local site
- **Old Style Village** - local site
- **Antiquity** - city/town
- **Goodman Twp.** - township
- **Meigs County** - county/parish
- **Ohio** - state/province
- **United States** - nation/area (links to **North America**)

Blank Place Levels

When entering place names, include as many of the place levels as known: rather than just city and state, enter city, county, and state. Separate each place name level with a COMMA. If a level is not known, a comma can be inserted to help Genbox assign the other place names to their proper levels.

Auto-completion

When typing into the **Place** box, Genbox will provide auto-completion text, based on the history of places recently entered, on other place values entered for the current individual, and on places stored in the Places Table. This means only a few keystrokes are needed to enter place names that have been entered before. Even for new places, only the lower place levels need to be typed, as Genbox will recognize the commas entered and begin the auto-completion anew on each place level. When the auto-completion text matches the full name you wish to enter, press ENTER to accept the value and move to the next field. Otherwise, continue typing the new place name.

Leading Modifiers

If the precise location of an event is not known, or if the precise location is known but it does not correspond with a known place name, a **leading modifier** can be used before the place name, to "modify" the information that follows. Genbox will treat any **lowercase** text appearing before the first capitalized word as the place modifier ("number words" appearing before the first capitalized word will be considered part of the place name, as in street addresses). For example:

near Hobogon, Missouri

30 miles north of Railwood, Montana

just off the coast of South Carolina

in a dry creek bed behind 2446 Maple Street, Treetown, Ohio

next to, or perhaps under, an old stump on the trail leading west from Cherry Grove Park, St. Somewhere, Texas

the master bedroom, second floor, of his summer home at 2258 Romano, Naples, Italy

The modifier text will be stored in the Event record, not in a Place record. When charts and reports are produced, the leading modifier will be shown along with the place name.


On the [Events page](#), leading modifiers will appear in the **Local Site** box, before the local site name, if any.

Initial Place Data

Each new, "blank" Genbox database begins with several hundred place records already defined. These records are for nations of the world, U.S. states, Canadian provinces, counties of the United Kingdom, Australian states, and several well-known cities. Short forms of the names are also included in some cases. This data helps to anchor the places system, to improve consistency in entered data and provide the auto-completion routines with a set of known values to match against.

If you develop an extensive or specialized place database in one of your databases, you may wish to import it into your new Genbox database as an even better starting data set.

Deleting Places

- **To delete a place record**, choose Delete Place on the Data menu, or click the **Delete Record**  button on the toolbar. All references to the place will be set to zero. Research targets for the place will be deleted as well.

Opening the Magnify Place Dialog

Sometimes it is helpful to view/enter the place name parts separately, rather than working with the complete name all on one line. The [Magnify Place dialog](#) was designed for this purpose. This dialog allows you to easily move name parts between place levels and verify the levels of the new place names being added.

- **To open the Magnify Place dialog**, first click in the place name field, then press F5 or choose "Magnify Place..." from either the right-click context menu or the Select Menu.

Notes

A genealogy is more than names, dates, and places. It is an exploration into the fascinating world of our ancestors. How they lived, what was important to them, what were their dreams, their achievements and tragedies. It is this related information that makes a genealogy compelling to the reader. In Genbox, this information is stored in the **General Notes** boxes. You can write as much about your ancestors and their world as you like. The general notes can be included in the body of your reports, immediately following the factual information that they amplify.

While researching your genealogy, you may find it helpful to have a convenient place to store your research notes related to specific data items. A place to record your past research efforts, your thoughts and your "to-do" items. If something looks wrong or doubtful, you'd like to make a note of it before you forget. What you would like is a place to record notes **about** your research, separate from the genealogical data itself. In Genbox, this information can be stored in the **Research Notes** boxes. The research notes boxes appear next to the general notes boxes on a number of data view pages. By keeping the general notes and research notes separate, it is possible to generate reports that contain just the general notes or just the research notes, or both. Include the research notes when you would like a "research report" for your own use. Include just the general notes when preparing your genealogy for publication.

General notes and research notes can be entered for a number of data items:

- [Individuals](#)
- [Individual identifiers](#)
- [Parent links](#)
- [Families](#)
- [Events](#)
- [Places](#)
- [Place names](#)
- [Sources](#)




In addition, there are other note boxes for special purposes throughout Genbox.

Entering Notes

Note boxes can contain an unlimited amount of text. When entering text, use complete sentences. The notes will be shown on reports just as you type them.

Text Styles

The **General notes** and **Research notes** boxes contain **rich text**. Unlike text in most data entry boxes, the text in notes can be styled: **bold**, *italic*, and underline. Use these styles to enhance the text, emphasizing words that you want to draw attention to.


- For **bold** style, click the **Bold** button  on the toolbar, or type **CTRL+B**.
- For *italic* style, click the **Italic** button  on the toolbar, or type **CTRL+I**.
- For underline style, click the **Underline** button  on the toolbar, or type **CTRL+U**.

These style buttons on the toolbar will be disabled when the insertion point is not in a notes box.

Note There is no "font style" toolbar button for note fields. On reports, notes will be shown in the font selected for the body of the report. On the screen, the font for notes is selected on the [Preferences View](#).

Source Citations in Notes

Note boxes do not have an associated source citation button, unlike other data entry boxes. Because notes can contain a large amount of text, source citations should properly be placed after each small section to which they apply, usually just a few sentences.


1. To add a source citation to a note, click the position in the text at which the note number should appear.
2. Click the **Source** button  on the toolbar or press the **F4** function key. You will see a code similar to **[S120]** inserted into the note, and the Source Pick Dialog will appear.
3. Choose a source record from the Source Pick Dialog, or click "Add New" to enter a new source record.
4. After choosing a source, the [Citations View](#) will open. Here, you can enter the "where in source" information, such as the actual page number in the source where you found the information.

Field Codes in Notes

In addition to source citation codes, notes can have other special field codes that appear enclosed in square brackets, such as **[L1234]**. The field codes will be replaced with data values when the note appears on a chart or report. By using field codes for data values, such as individual names and place names, Genbox will be able to include index references and HTML hyperlinks on the reports. It can also save you a lot of typing.

The full range of field codes available for event templates can be used in the notes. However, the field codes that are specific to event records will only work correctly in the general notes and research notes on the Events Page. In other notes, they will have a blank value.

To add a field code to a note, first position the text cursor at the proper location, then do one of the following:

- **Type it in directly**, or
- **Open the Add Field Code Dialog** by clicking the **Insert Field Code** button  on the toolbar, or by typing **CTRL+D**.

Previewing Notes

If you have added field codes or embedded source citations to your note text, you may wish to preview how the note will be displayed on reports, once all the field codes have been filled with data values.

- **To preview how your note text will appear on a report**, click the **Toggle Codes** button  on the toolbar, or press the **F2** key.

When showing field values, the note box will be in read-only mode. Source citations will be shown as footnotes. Press **F2** again to return to normal mode.

Private Notes

Sometimes you may wish to store your own personal observations or reminders in the notes fields, but don't want these additions to appear on charts, reports, or GEDCOM exports. You can mark a range of text as "private" by enclosing the text in **curly braces**. For example:

Martha was feisty until the day she died. {This is the aunt that didn't come to our wedding.} She was sorely missed by her husband.

On reports, this will print "Martha was feisty until the day she died. She was sorely missed by her husband."

Note you can set the "override privacy flags/marks" setting when you do want to see the private notes on the output.

Opening the Notes View

When you want to view the contents of a notes field in a larger window, you can open the [Magnify Notes View](#). This view allows you to see the notes on the current page in a larger view. A number of operations can also be performed on the note text, such as spell checking, wordwrap, importing text from a file, and exporting text to a file.

- **To open a Notes View for the current notes field**, press **F5** or choose "Magnify Notes" from either the right-click context menu or the Select Menu.

The Notes View is *modeless*. This means you can freely move between the Notes View and other views, entering and modifying text.

Adding Multimedia

Adding pictures and other multimedia to your database can make your charts and reports much more interesting. Follow these broad guidelines:

1. Use a scanner to create electronic images of your pictures.
2. Save the images in separate files with descriptive filenames.
3. In Genbox, create a media record for each image, audio, and video file.
4. Define links from individuals, families, events, places, sources, or researchers to the media records.
5. Select appropriate options on the **Media** options page when making charts and reports.

Media Control








The **Media** control is used to select and display the multimedia that is linked to a data record. The **Media** control appears in the following places:

- Individuals View, **Summary** page: link multimedia to individuals
- Individuals View, **Family** page: link multimedia to families
- Individuals View, **Events** page: link multimedia to events
- Places View, **General** page: link multimedia to places
- Sources View, **General** page: link multimedia to sources
- Media View, **General, Content, and Clip** pages: show multimedia associated with the media record
- Media Preview Dialog: display the multimedia in a larger view window
- Researchers View, **General** page: link multimedia to researchers

The **Media** control is the open space on the right side of the page. It initially displays the principal media that is linked to the data record, if any. Any number of multimedia objects can be linked to each individual, family, event, place, and source.

Media Control Buttons

There are four media control buttons beneath the image area: **Play, Previous, Next, and New.**

- The **Play** button will appear as a picture  when a picture has been linked to the current data record and it is being shown. Click this button to view the picture in the larger [Media Preview Dialog](#).
- The **Play** button will have an ear on its face  when an audio sound is the linked media. Click this button to hear the sound.
- The **Play** button will look like a film strip  when a video is the linked media. Click this button to start the movie. A second click will stop the movie.
- The **Play** button will display an image of the world  when a URL is the linked media. Click this button to open your web browser and view the linked web page.
- The **Play** button will display a document  when the linked media is an object. Click this button to view the object in its native application. For example, if the linked media record is a Word document, then Microsoft Word will be launched to display the file.
- The **Play** button will display a question mark  when the linked media is of unknown type.
- The **Play** button will not appear if there is no linked media, and the **Media** control will be blank.
- Use the **Previous** button and the **Next** button to step through all of the pictures linked to the data record. If both buttons are grayed, that means there are no other pictures. If a button is bold, that means there are more pictures to view in that direction. Clicking a grayed button will cycle to the picture at the other end of the sequence.
- Click the **New Media Link** button  to add a new media link to the current data record. The [Select Media Dialog](#) will appear and allow you to choose the media you wish to link. If you are adding the first media object to a data record, you can also click the open area to bring up the dialog.

Caution Be careful not to confuse the media buttons with the subrecord buttons on the **Events** page and the **Family** page. The media buttons always appear **BELOW** the **Media** control. The subrecord buttons always appear immediately below the horizontal scrollbar, **ABOVE** the **Media** control.

When you already have a picture, you can double-click it to jump to its record on the [Media View](#) where you can set picture properties, such as a caption and preferred size for reports.

Principal Media

A data record can have several media records linked to it. Of these, only one can be marked as the **principal** media for the data record. The principal media is the one that will initially be displayed alongside the data in its view. It is also the media that will appear on charts, and on reports when the number of media items is set to one.

Marking Media as Principal

The first media record linked to a data record is marked as its principal media record. If there are several media records linked to a data record, you can choose which one of them to mark as the principal media:

- On the data view, use the media next/previous buttons to bring the desired media into view.
- Right-click on the media control to display the popup menu.
- Select "Mark as Principal Media" from the popup menu.

Media File Search Paths

When you specify the file names for your media files, you can enter either a **complete file path** (one beginning with a driver letter or backslash) or a **partial file path**. A partial file path, also known as a **relative file path**, will cause the system to search for your file according to the following sequence:

1. The **Preferred Folder for Media Files**, as set in Preferences.
2. The **Default Folder for Media Files**, as set in Data Setup.
3. The **same folder as the database file** (.GDB)
4. The **application directory** (the directory where GENBOX.EXE is installed)

This search order (preferences folder, data setup folder, database, application) is fixed. If you have entered relative file paths, this search order allows you to easily redirect where the system expects to find your media files.

You can redirect the location for all media files globally (by changing the value in preferences) or all media in a particular database (by changing the value in Data Setup). Otherwise you can have your media simply stored with the database or a subfolder beneath the database. Finally, media that would be useful for several databases can be stored in the application folder or a subfolder.

Overriding the Media File Search Path

In addition to letting the system apply the default search order for media files with relative file paths, you can prefix your filename with one of the following prefixes to override the default search order and pre-select which of the four default file paths will be used:

- "pref"
- "data"
- "db"
- "app"

Include the double quotes enclosing the prefix, as in:

"data"media\gen7\AuntTilda.jpg

If the media file is not found in the specified location, no other locations will be searched.

Citing Your Sources


The source documentation is what separates the genealogy of an beginner from an expert. Source documentation that is properly formatted and complete lends credibility to your work. It provides accountability, because a fact that is properly documented can be verified. Information without the documentation to back it up is sure to frustrate the next researcher, who will either repeat your research or ignore your data altogether.

What should be documented? The general rule is:

- Any fact that is not general knowledge should have a source citation.

Adding Source Citations







- **To add a source citation to a data item**, click the "open book" **Source Citations** button to the right of the text box that contains the data item.
- If the data item is in a list, there will be a column of open-book icons for the same purpose.
- To add a source citation to a portion of a rich text note, highlight the range of text that applies, then

click the source citation  button on the main toolbar. A marker will be inserted at the end of the marked range.

When adding the first citation for a data item, you will be prompted first to choose a source record, or create a new one. Then the [Citations View](#) will appear. If a citation already exists for a data item, clicking on the Source Citations button will open the Citations View and the citations will be displayed. Additional citations from other sources can then be added.


Source Citation Button Faces

The faces of the "open book" source citation buttons indicate both the presence of a source citation and the selected **surety level** for the corresponding data item:

-  - (star) Convincing evidence.
-  - (plus) Assemblage of evidence.
-  - (tilde) Probable conclusion.
-  - (dash) - Marginal evidence.
-  - (bullet/zero) - A source citation record exists, but no surety assignment has been made yet.
-  - (blank) No source citation record exists.

See the section [Assertion Surety Levels](#) for a fuller description of these levels.

Source Citations Embedded in Notes

For rich text notes, source citations will be marked with a special format: the letter "S" followed by the source citation record ID and surety code, delimited in square brackets, as in "[S48~]" for a source citation ID of 48 and surety of "probable conclusion". You can click within the brackets and then click the source citation  toolbar button to jump to the indicated source citation record. You can also delete the marker to remove the reference to the source citation, or cut and paste it at a new location within the note, or change the surety level to a different code. Rich text notes can have multiple source citations for different (non-overlapping) text ranges; in this case, the range of text to which a source citation applies will end when the previous source citation marker is reached, or when a hard line break is reached.

Source Documentation Views

In Genbox, source documentation is divided between two views: the [Sources View](#) and the [Citations View](#).

- The **Sources View** displays records from the Sources table. The Sources table has one record for each source.
- The **Citations View** displays records from the Citations table. The Citations table records define the links between data items and source records. Each data item, or **assertion**, can have citations to multiple sources. The Citations View presents all the source citations for a particular assertion as a group.

There can be many citations to the same source record. By keeping information on each source in a separate table, most of the citation information only needs to be entered once.

The Sources Table also has a similar feature. Source records can link to higher source records. When a source document is actually found within a larger source, such as a book, the information on the higher source is kept in a separate record from the lower source. Then, if another source document is used from the same higher source, the information on the higher source does not need to be entered a second time.

This means, when a data item is linked to a citation record, the citation record will be linked to a source record, which in turn can be linked to a higher source record. A data item can have multiple citations, as well.

Citation Support Levels

The Citations table stores links from data items to source records. Each Citation record can specify how well the source supports the data item. The **Support Level** can be one of the following values:

- +2: Primary and Direct Support
- +1: Secondary or Indirect Support
- -1: Inconsistent
- -2: Direct Conflict
- ? Undetermined

Primary and Direct Support

Primary means that the source was recorded by someone with personal knowledge of the data and that it was recorded at or near the time of the event. **Direct** means that the source directly addresses the assertion that is being linked. If the assertion is that a birth occurred on a particular date, direct support would mean that the source specifically mentions that the birth occurred on that date.

Secondary or Indirect Support

Secondary means that the source was recorded by someone without personal knowledge of the event, or that it was recorded long after the event occurred. Both of these conditions tend to degrade the accuracy of data. **Indirect** means that the source doesn't specifically state the assertion, but it can be inferred from the context and other data that is included.

Inconsistent

A support level of **inconsistent** indicates that the source may be suggesting the assertion is wrong at one point, but that it also seems to support it at another point.

Direct Conflict

A support level of **direct conflict** indicates the current source's data negatively supports the assertion. In fact, the source is asserting something opposed, such as an entirely different date, different place, different relationship, etc. It is still important to include these source citations, so that the surety of the conclusion can weigh all of the evidence, both pro and con.

Undetermined

New Citation records initially have the support level set to **undetermined**. When you have made a determination of the support level of the source for the assertion, you should change the support level to one of the other values.

Citation Credibility Levels

Each Citation record can also specify a level of credibility for the source. The **Credibility Level** can be one of the following values:

- Very high
- High
- Medium
- Low
- Very low
- Undecided

Citation Rationale

The **Rationale** text box can be use to store text that briefly explains why you believe the cited source is relevant to the current assertion. It is for your own personal research purposes, and does not normally appear on output reports. You can store here the reasons why you assigned a low/high support level or low/high credibility, or the facts extracted from the source that you think make your case, or personal reminders of work yet to be performed.

The rationale text is entered on the Cited Sources page and appears as a column in the cited sources list on the Assertion page, so that it can be used when assessing the overall surety level for the assertion.

Assertion Surety Levels

A data item, or assertion, can have more than one source citation. Each source citation can have a support level, credibility level, and rationale. By careful consideration of all of the source data, the support levels and credibility levels, a determination is made for the **Surety Level** of the assertion.

Source citations with a high support level will increase the surety level, and citations with a low support level will decrease the surety level. Also, source citations with a higher level of credibility should be weighed more heavily.

The Surety Level of an assertion can be one of the following values:

- 4: Convincing Evidence
- 3: Assemblage of Evidence
- 2: Probable Conclusion
- 1: Marginal Evidence
- 0: Undecided

Convincing Evidence

A surety level of **convincing evidence** means that the sources have convinced you of the validity of the assertion. They were of high credibility, mostly from primary sources, directly stating the assertion. You consider the assertion to be reasonably certain, and your reports will present the asserted data as a fact.

Assemblage of Evidence

A surety level of **assemblage of evidence** means that there was a "preponderance" of evidence in support of the assertion. While there may not have been any primary sources, or maybe the assertion wasn't stated directly, but there were many sources available that suggested the assertion with reasonable certainty. You will report the fact as "most likely" true.

Probable Conclusion

A surety level of **probable conclusion** suggests that, while you believe the assertion is correct, your evidence isn't as strong as you hoped. You still have some doubts. That key document you wanted couldn't be found, and what you did end up with was either sparse or had other problems. Still, you don't have a strong reason to think the assertion is wrong. On reports, you will qualify the fact as "probably" true.

Marginal Evidence

A surety level of **marginal evidence** suggests that, far from finding anything conclusive, your evidence is very minimal. Maybe all you have is an oblique reference in a highly questionable source. Or, the data that you do have doesn't seem to agree well, leading you to believe something is suspect. On the other hand, you do have some support, and some source documentation is better than nothing. Also, it may spark the next researcher into investigating the issue further. On reports, you will qualify the fact as "perhaps" or "maybe" true.

Undecided

A surety level of **undecided** means you haven't had an opportunity to properly consider the sources, and have left the default surety level unchanged.

Source Templates

The formatting of source citations is complex. A citation should provide enough information so that the next researcher can easily relocate the source. Because there are many different types of source documents, there are also many different source citation formats. In Genbox, the formatting of a source citation is controlled by a **source template**. The source template controls how the data is presented to the user. Like the event templates, the source templates reference values stored in the data records, using variables.

Each source record is categorized by its **Source Type**. The source types are defined in the Source Templates table, which can be viewed with the [Source Types View](#). The Source Templates table contains default templates for each source type. This simplifies the formatting of source citations considerably. Once you identify the type of source record, Genbox can format the source citation automatically, using the default templates. Each source record can also have its own templates. This allows you to modify the default templates to better suit individual source records, if desired.

Source Lock Mode

A good practice to follow when entering your genealogical data is to begin with your source documents, working with one source document at a time. You enter all the information you can extract and store it to the proper records in your database. You may add data for several individuals. After you finish with the first source document, you then move on to the next one.

When entering data this way, you can use **Source Lock Mode** to automatically create source citation links between the data you enter and the "locked" source document record.

To use source lock mode:

1. Open the [Individuals View](#) and the [Sources View](#).
2. On the Source View, move to the source record that you want to lock.
3. You may wish to click the **Evidence** page so you can view the evidential data while you work.
4. To lock the source record, click the image of a **key** that is on the **Sources** view. Or, go to the **Select** menu and click **Lock to Source**. The image of a key will change into the image of a padlock, and the Sources view title bar will include the word "LOCKED". These changes indicate source lock mode is on.
5. On the Individuals View, enter the data that is contained in the source. Citation records will be created automatically. Also, any data fields that are edited will also receive a source citation record automatically. (Data that is only viewed will not receive a source citation.)
6. When you are done, click the image of a **padlock** that is on the Sources view. Or, go to the **Select** menu and click **Unlock Source**.

Note The key on the Individuals View, which is used to select Source Filter Mode, will NOT change when you click the key on the Sources View.

Source Filter Mode

In addition to Source Lock Mode, you can also choose **Source Filter Mode**. This is similar to Source Lock Mode, in that data you enter will automatically receive source citations to the locked source record. But Source Filter Mode also filters the display of data: **only data items with source citations to the current source will be displayed in the Individuals View**. This means most of your individual records will be hidden, and many of the events, identifiers, and other details of the remaining individuals will appear to be missing. But remember: this is a filtered display; the data not shown is still stored in the database.

To use source filter mode:

1. Open the [Individuals View](#) and the [Sources View](#).
2. On the Source View, move to the source record that you want to lock.
3. You may wish to click the **Evidence** page so you can view the evidential data while you work.
4. To lock the source record, click the image of a **key** that is on the **Individuals** view. The images of keys on **both** the Individuals View and the Sources View will change into padlocks. The Individuals View title will include "LOCKED to Source X", where "X" is the Source ID number. The background color on the Individuals View will also darken. These changes indicate source filter mode is on.
5. On the Individuals View, you will see only the individuals and records that have source citations to the locked source record. You can enter more data and it will automatically receive a source citation to the locked source.
6. When you are done, click the image of a **padlock** that is on either the Individuals View or the Sources view, or go to the **Select** menu and click **Unlock Source**.

The advantages of Source Filter Mode include:

- You can lock a source to see what data is linked to it.
- You can return to source filter mode to add or modify data linked to a source record

Source Names

When you are entering your research, it is important to record data as accurately as possible. This includes recording names exactly as they appear in your source.

Deleting Sources

To delete the source record currently visible on the **Sources View**, click the Delete Record  button on the toolbar, or choose Delete Source from the Data Menu.

When a source record is deleted, all linked source citation records are also deleted. Lower source records are kept, but the link to the higher source is set to zero.

Organizing Your Research

The key to making the best use of your research time is organizing your tasks and identifying your objectives. Genbox provides several tools for managing your ongoing research.

Overview

The general goal of a genealogist is to reconstruct a family history that is as accurate as possible. This is accomplished by performing a thorough search for relevant information sources, careful analysis of the evidence, and finally the formation of well-supported conclusions, which take all of the evidence into account. It is this careful, thoughtful, step-by-step process from sources to conclusions that produces the best results, and "doing it right" can also make genealogy a more rewarding experience.

During your collection of source documents, you will encounter conflicting data--dates, places, and other facts that do not seem to agree. Which is correct? Don't store one and ignore the other, as that would be jumping to a conclusion; instead, store *all* of the relevant data you find. Genbox supports the storage of multiple data values for names, events, and relationships. Two different birth dates or places? Create two birth event records. Two different sets of parents? Store two parent family records. Carefully document your sources for each set of information. Later, you can evaluate the credibility of each piece of evidence, both in the context of the source where it was found and in light of all the information collected. Your final conclusions can refer to both the supporting and conflicting accounts and explain your reasoning for why you think one fact is more likely than the other.


The previous chapter stressed the importance of citing your sources.

A second-generation approach to organizing data around sources, with a two-level approach of first identifying **personas** from sources and only later grouping them into **composite individuals** has been implemented. Data can be entered in **source lock** mode to rapidly and conveniently enter proper source citations at the time data is entered into the system.

Research Notes

Most records support two rich-text notes boxes: one for general notes and one for research notes. You can use the research notes boxes as a "work area" or "scratch pad" to jot down your ongoing research status, a list of "to do" items, things to check, your hunches, whatever you like. Charts and reports allow you to select whether research notes should be included. On reports, you can also select whether the research notes should appear in the main body of the text or in the footnotes/endnotes.

Research Targets

When you identify a part of your genealogy that you want to investigate further, you can easily mark it as a **research target**. Research targets are marked (and accessed) by clicking the **Target** button  on the data view for the desired data record:


- Individual identifiers: [Identifiers Page](#)
- Individual parent links: [Parents Page](#)
- Individual spouse links: [Family Page](#)
- Individual events: [Events Page](#)
- Research on an individual in general: [Notes Page](#)
- Place names: [Places Names Page](#)
- Research on a place in general: [Places Notes Page](#)
- Research on a source: [Sources Notes Page](#)

When you click a **Target** button, the [Research Targets View](#) will open to display the Research Targets record associated with the current data record. If no record exists, a new one will be created.

The coloring of the **Target** button indicates whether a Research Target record exists for the current data record, and its status:

 (gray): no Research Target record exists.

 (red rings on gray): Target record exists, but no searches have been defined.

 (red rings on yellow): one or more open searches have been defined.

 (black rings on green): all searches have been completed.

Research Target records are good for keeping track of your research related to a data item. You can describe what you are looking for, plan your research trips, and record your findings.

On the [Research Targets View](#), the [Target page](#) identifies the data record that is the target, and lists the **searches** that have been defined for it. It has a **Description** box where you can describe the nature of your research. The [Searches Page](#) displays information on each search scheduled for the current research target. Your results are stored back to the same search records, providing you with a history of your past research efforts. The [Links Page](#) shows how your research efforts are related to your **project objectives**.

Projects and Objectives

Researching a genealogy can be a very big undertaking. There can be dozens of genealogical lines of interest, each with hundreds of research tasks that could be performed. You need some way to organize those tasks, make decisions about priorities, and keep track of progress, at both the low level and the big picture.

The [Projects View](#) supports these capabilities. You can define top-level **projects** that are composed of lower-level **objectives**. Objectives can have their own sub-objectives, creating a hierarchical organizational structure. The [General Page](#) provides for entry of status information on projects and objectives: date scheduled, date completed, priority, status, percent complete. It also has a notes box for a description of the project or objective. The [Objectives Page](#) displays the project hierarchy as an indented list, or **tree**. Each objective is listed, along with an indicator of its current status. With this page, you can study the project as a whole, and identify areas where you want to work next. Clicking an objective will cause a jump to that record.

Each project/objective record can be associated with a number of **research targets**. The [Research Page](#) lists the Research Target records that are linked to each project/objective record. Using this page, you can tie your research efforts directly to your larger research goals.

Correspondence Log

Another organizational goal is keeping track of your correspondence with archives, courthouses, governmental offices, distant relatives, and other researchers. When did you send a letter, to whom, and why? Where is the letter now? What information did you request the last time you wrote to Uncle Fred, and how long has it been? Who is your contact at the Peabody Library, and what is the address?

You can keep track of your correspondence with the [Correspondence View](#). The [Log Page](#) displays a list of all correspondence records. You can click its column headers to sort by correspondence type, direction, correspondent, date, or subject. You can add new correspondence records by typing into first blank row at the bottom of the list. For the currently selected correspondence record, you can view and enter **Details** and **Storage** information at the bottom of the page.

The [Contact Page](#) provides a place to view/enter address and E-mail information for each correspondent.

Merging Records

A fundamental task in genealogy research is determining when two (or more) identified individuals are actually the same person. Genealogies are built by identifying the connections between people, so much can be gained by finding these individual-to-individual matches. Typically, the data collected will not be an exact

match, and the overlap will be only partial. Maybe the names are spelled slightly differently, or the birth dates are off by a few days.

A good way to compare a pair of merge candidates is to open their data records side-by-side. To open a second **Individuals View** in Genbox, choose the "Windows: New Window" menu option. This will open another copy of the current view. You can choose "Window: Tile Horizontally" to get them side-by-side. Then, use the key boxes to position each view on one member of the merge candidates pair. By stepping through the tabs on each view, all of the data stored for each of the individuals can be compared.

Extracting Marked Subrecords

When you have determined that data stored for an individual actually belongs to a separate individual, you can **mark subrecords** that you want to move to a new individual main record.

1. **To mark subrecords:** Go to each subrecord that you want to extract on the [Individuals View](#).
2. On the **Select** menu, click **Mark/Unmark**. Or, press CTRL+M.

You can also mark/unmark **all** subrecords for an individual with options on the **Select** menu.

Once you have the desired set of subrecords marked, on the **Data** menu, click **Extract Marked Subrecords**. The subrecords will be moved to a new individual main record.

Searching and Grouping

Loading all your information into a database is great for storage, but not of much use if you can't easily find what you are looking for later. Genbox provides a number of ways to search for data. You can quickly locate single records or groups of records.

View Headers

View windows that display data records have a **header section**, which contains an **ID** box, a **Name** box, and a **Filter** button. The header section indicates the current record and filter conditions, and can be used to select the record to view.

- If you know the ID of the record you want to view, the easiest way to locate it is to type the ID into the **ID** box and press ENTER.
- When you know the name of the record, type it into the **Name** box and press ENTER. You can type just part of the name if you prefer. In most views, Genbox will automatically complete the name to one of the existing records; if this is the name you intended, simply press TAB to accept it; otherwise, simply keep typing more of the name.
- When there are several records with names that match the name you typed, a **Pick Dialog** will appear, displaying data on each of the matching records. You can select the record you intended from the list.

Pick Dialogs

Each of the main data types has a corresponding **Pick Dialog** that can be used to select records. A pick dialog will appear whenever the name value you enter in a data reference text box is ambiguous. It will display all the matches that have been found, and allow you to select the record or group of records that you intended. You can also specify filtering conditions for the list, to make it easier to find the records of interest. More information is available on each of the pick dialogs:

[Citations Pick Dialog](#)

[Correspondence Pick Dialog](#)

[Icon Pick Dialog](#)

[Individuals Pick Dialog](#)

[Media Pick Dialog](#)

[Places Pick Dialog](#)

[Projects Pick Dialog](#)

[Research Targets Pick Dialog](#)

[Researchers Pick Dialog](#)


[Sources Pick Dialog](#)


Refer to the Table of contents for where to find details on each of these dialogs.

Filtering Views

The data views normally display all records stored in the database. Using the **record movement buttons** on the toolbar, you can step through all records that have been stored.

Sometimes you may be interested in a small subset of the records. You can define a **filter** for the view. When a filter is active, only the records that match the filter will be visible when the record movement buttons are used: the **First Record** button will take you to the first matching record, and the **Next Record** button will take you to the next matching record, skipping over all records that don't match the current filter conditions. This allows you to quickly move between records that are related, according to your selection criteria.

1. To **filter records**, press the **Filter** button  at the right side of the header section of the view. A **Pick Dialog** will open.
2. Enter the filter conditions you want. For the [Individuals Pick Dialog](#), this can be name pattern, range for birth date or death date, sex, number of children, number of spouses, number of families, and individual flags.
3. Click the **Set Filter** button. The Pick Dialog will close, and the first matching record will be the current record.

The **Filter** button will have a pressed appearance  whenever a filter is active. This is to remind you that the record movement buttons are only stepping through a subset of the total records.

- To **turn off filtering**, press the **Filter** button . A **Pick Dialog** will open.
- Click the **Clear Filter** button. The Pick Dialog will close, and the **Filter** button will resume its normal appearance.

Lists

Some operations are easier or quicker to perform when records can be grouped into **lists**. Rather than selecting records one at a time, you select a predefined list instead.

The [List View](#) is for manipulating all types of lists in Genbox. Lists can be viewed, created, edited, renamed, copied, pasted, and deleted. Lists can then be used for group record selection on charts, reports, filters, queries, and export. You can also use a list to delete a group of records at once, mark all records in a group, copy a list to a view filter, or use a list to update the flags for individuals, places, or media.

Genbox has a number of predefined lists, such as the lists of Individuals, Families, Places, Sources, and other main data records. Some lists are created automatically by the program as the results of various commands:

- The **Query Results** list is created when you run a query with the [Search View](#).
- The **Possible Duplicates** list is created when you use the [Match Finder Tool](#).
- The **Potential Problems** list is created when you use the [Problems Spotter Tool](#).
- The **Jump History** list maintains a record of all views and records visited, to support the **Back** and **Forward** buttons.
- The **Filter Lists** are created when you define a filter for any of the main views.
- The **Flag Lists** display the records that currently have each type of flag set.
- The **Mark Lists** display the records that have been marked.
- The **Chart Keys**, **Chart Starters**, and **Chart Results** lists are defined automatically when a chart is produced.
- The **Report Keys** list is defined automatically when a report is produced.

You can define your own lists, by copying and pasting from other lists. You can create groups of records that will then be available for use on charts or reports, either as the keys or as a styling or content group.

Searches

The most powerful and flexible search capabilities for individuals are supported by the [Search View](#). Several pages of search criteria can be specified. When you are ready to perform the search, click the **Search** button. The results will be saved to the **Query Results** list, which is visible on the [List View](#). The List View will be opened automatically to display the results.

Match Individuals

Because a Genbox database stores genealogy data, the search capabilities were designed around retrieving individuals that have specified relationships between each other. You can set search criteria for up to **four match individuals**, including their relationships. This powerful capability allows you define searches such as:

- Children who have the same given name as their father
- A child born on his parents' wedding anniversary.
- Someone whose initials were "J. T." who had a father named "Paul", a mother who emigrated from Scotland, and was married to someone who died in May, 1952.
- A man who died in his fifties in London that had a son who was serving in the military in 1945.
- A woman who had one parent from Germany, the other parent from England, a grandparent from France, and another ancestor from Spain.
- A tailor with 3 or more children who had an ancestor that was Roman Catholic and a brother who was married 4 times, once to an Irish woman who died before 30 years of age.

Special Characters

When entering match conditions, you can enter special characters that control the search.

- **For text fields, you can use:**
- * (asterisk) matches any number of characters (including zero characters).
- ? (question mark) matches any single alphabetic character. For example: **Gord?n** will match Gorden, Gordan, Gordon.
- # (pound sign) matches any single digit (0-9). For example: **1#3** find 103, 113, 123.
- ! (exclamation mark) means "not".
- [abc] matches any single character within the brackets (a, b, c in this case). For example: **b[ae]ll** finds ball and bell but not bill or bull.
- [a-z] matches any single character within the specified range (a through z in this case).
- [!xyz] means match any single character NOT within the brackets (x, y, z in this case). For example: **b[!ae]ll** finds bill and bull but not bell or ball.
- !* matches empty fields (not anything)
- [] also matches empty fields (zero-length strings).
- If you want to search on one of the special characters listed here, enclose it in brackets. For example: **Gord[?]n** will match Gord?n but not Gordan or Gordon. Another example: **[[]S84[!0-9]** will find the note with source citation 84. You can search for an opening bracket with **[[]**. The **[!0-9]** part prevents matches to S842, S849, etc. There is not a way to search for a closing bracket.

Note: if no wildcard asterisks are included, asterisks will be added both before and after your entered search text. So, if the entered text is "father", then the actual search will be on "**father*", allowing a match anywhere in the field. If instead you include an ending asterisk, as in "father*", then this match string will only match to the beginning of the field; records that have father later in the text will not be returned. If you include a beginning asterisk, as in "**died.", then only records with text that END with your match string will be returned.

- **For numeric fields, you can use:**
- < less than
- > greater than
- <= less than or equal
- >= greater than or equal
- ! not equal

Making Charts

A **chart** is an excellent way to present your genealogical research. With a glance, people can appreciate the depth and breadth of your work. With a closer look, they can discover a wealth of details--dates, places, notes. They can be stylized with flourishes, color-coded to emphasize certain facts or lineages, and illustrated with images of people and places. Charts can be formatted onto multiple pages, or big enough to fill a wall. They can be tall and thin, short and fat, rectangular or round. You can present your entire genealogy or any portion. You can preview your chart onscreen, zoom and pan, and make changes or additions.

Making a Chart

Hint Before you start, move to the individual on the Individuals View that you wish to be the default "key" individual for the chart.

To make a chart, begin by going to the Charts Menu and pointing to one of the general chart types:

- [Ancestor](#)
- [Descendant](#)
- [Related](#)
- [Convergent](#)
- [Everyone](#)

A submenu of specialized chart types will appear. Click either **Basic** or one of the specialized chart types.

The [Chart Options View](#) will open. It has eleven pages of options, which are similar for each of the chart types:

[Key Page](#)

[Titles Page](#)

[Section Page](#)

[Layout Page](#)

[Content Page](#)

[Styles Page](#)

[Detail Page](#)

[Links Page](#)

[Format Page](#)

[Sizes Page](#)

[Frames Page](#)

Each chart type has default settings. You can change any of the options you wish.

Finally, click the **Make Chart** button. The [Chart View](#) will open, displaying your chart with scrollbars.

You can scroll around, zoom, move and resize boxes, and add additional pictures, annotations, and lines.

If you don't like the options you picked, you can close the Chart View, go back to the Chart Options View, change some options, and click **Make Chart** again. Experiment and have fun!

When you are satisfied with the appearance of your chart, you can save it or print it. You can reload your saved charts later for viewing or further editing. You can also E-mail them to relatives for them to view, if they have Genbox.

Reading Charts

Genbox charts are constructed of **boxes** and **links** between the boxes. The boxes represent individuals or families. The links are lines that represent the genealogical relationships between the individuals. Each box can be a different size, depending on the amount of content contained within it. You can choose from a wide range of styles (colors, fonts, shapes, shadows, borders) to add visual interest and draw attention to specific portions of your chart.

The boxes for individuals in the same generation are generally aligned in rows (or columns for sideways drop directions). For a descendant chart with a downward drop direction, the top row on the chart will be for the oldest generation.

There are two types of links shown on charts: **child/parent links** which connect children with their parents, and **family links** which connect the two spouses of a family.

Chart Layouts

Each of the main chart types can be drawn in a number of different layouts, specified on the Layout page. There are three main types of layouts supported: **rectangular**, circular or **fan**, and **timeline**. Rectangular layout charts are the most versatile, with the largest number of options. A fan layout is useful for special purposes and for creating a distinctively different look. Timeline charts present the boxes sized and positioned according to the birth and death dates of the individual, which can be helpful in understanding how the lives of the individuals may have intersected.

Box Contents

Each box contains, as a minimum, information on a single **primary individual**. A primary individual is an individual that was reached by following the parent or child links from the ancestors or descendants of the **key individuals**.

A box can also contain information on one or more **spouses**. Spouses are individuals that are reached by following the family (marriage) links from the primary individuals. When such an individual can also be reached by following the direct lines from the key individuals, the individual may be treated instead as a primary individual.

Within a chart box, information on the primary individual is shown first, beginning with their name and other selected identifiers. The name of the spouse follows, with other selected spouse information. Family information, such the date of marriage, appears third. If there are additional spouses shown in the same box, their names, other information, and family information will follow. Multiple spouses can be shown in the same box when they have neither ancestors nor descendants displayed on the chart.

If there are multiple spouses shown in the same box, they will be listed in **chronological order**, according to the date of the first family event. In this case, the link to the children boxes below will be labeled with the family number, to indicate which spouse is the parent of the children.

Box Parts

Each box has two ends: a **head** and a **tail**. Relative to the direction of drop, the head comes first, followed by the tail. On an ancestor chart, the direction of drop is normally up; the head would then be the top side of each box. On a descendant chart, the direction of drop is normally down; the head would then be the bottom side of each box. You can choose styles for the head and tail of the box independently, which provides for many unique combinations.

Boxes usually have **borders**. The box border is a line that defines the extents of the box. It can include an interior **margin area** which separates the contents from the line. Borders provide a neat appearance. You can choose a variety of styles for box borders. An **unboxed** chart style is also supported; with this style, box borders and their margins are omitted, although the data content continues to be organized into rectangular areas. Charts with the **unboxed** style generally are more compact than charts with box borders, because the margin areas are omitted.

The **interior** of each box contains the data content, which can be a combination of text, icons, and pictures. You can choose a color for the interior of the box, which on the Styles page is called **Shading**.

Boxes can have simulated **drop shadows**, which can produce a three-dimensional appearance. The color, size, and placement for shadows can be specified.

Child/Parent Links

Child/parent links connect children with their parents. Each **child/parent link** connects to the head end of one box and the tail end of another box. On descendant charts, the links connect between the head of the parent box and the tail of the child box. On ancestor charts, the links connect between the head of the child box and the tail of the parent box. Child/parent links are normally drawn with a solid line that always connects between the head and tail ends of the two boxes, never on the sides. Usually, the link line has three segments: a short segment sticking out from each box, called **stubs**, and a connector between them, called a **child bar**. When several child boxes connect to the same parent box, the child bar is shared by all the children, and it extends from the "leftmost" child stub to the "rightmost" child stub.

Genbox charts can show parents in the same box or in separate boxes. A child/parent link to a box containing two individuals means that **both** individuals are the parents of the child. A parent box can also contain more than two individuals. This means the primary individual had multiple spouses, of which some had no children. A child/parent link to a box with a primary individual and more than one spouse will be labeled with the family number of the spouse that is the second parent of the child.

When the parents appear in separate boxes, the child/parent link will be drawn to only one of the parent boxes. The other parent can be found by following the **family link**. Child/parent links can also connect directly to the family link between the two parent boxes. This option is selected by choose the **Link center** drop alignment choice on the Layout page.

Family Links

Family links connect the two spouses of a family. The **family links** can be drawn in two ways. When the two boxes to be connected are side by side, they are connected with two straight, solid, parallel lines drawn between the sides. This style of family link is called a **side family link**. This is the only time when links are connected to the sides of the boxes.

Often, it is not possible to draw the chart with every pair of spouse boxes side by side; there are other boxes in the same generation that appear between them. In this case, a **crossing family link** is drawn. A crossing family link is a single dashed line that contains two short segments with a long segment between them. The short segments, called **family stubs**, attach to each spouse box on the child side. The connecting segment of this dashed line, called the **family bar**, runs in the space between generations. The family stubs never connect to the center of the child side of the spouse boxes, which is used only for the child stub line. The family stubs will be offset in the direction leading to the other spouse box. If there are several family links to a box (representing multiple marriages), the family stubs will be spaced out along the side of the box.

A **crossing family link** means the same thing as a **side family link**. It is drawn differently so that it can avoid the intervening boxes, by going down, under, and back up. The line is drawn dashed because it often needs to **cross** the child/parent links of the intervening boxes. On charts, dashed and solid lines never connect.

When a primary individual has more than one family shown on the chart, each family link will include a **label**. The label will consist of the marriage order number. The family link label will appear outside of the box, next to the family stub line. Spouse names inside the box will also be labeled with the marriage order number, appearing in parentheses before the spouse name.

Link Channels

Boxes are usually drawn in generational rows (or columns). The space between each pair of rows, called the **drop space**, is used for the link lines, both child/parent links and crossing family links. The "height" of the drop space is set with the **Drop distance** setting on the Sizes page. When there is a single child bar within a given span in the drop space, it will be drawn in the middle of the drop distance.

Depending on your layout and data, your chart may have multiple child bars and/or family bars within the same span in the drop space. To avoid confusion, each bar will be assigned a **link channel**. Link channels are small offsets in the drop direction. Only one bar will be drawn in each link channel in a given span. While the spacing of link channels is automatic, you may need to increase the **Drop distance** setting on the Sizes page to allow for more room between generational rows.

Saving Charts

Charts produced by Genbox can be saved in a number of formats:

- Genbox chart format (extension .GCT)
- BMP image file (.BMP)
- JPEG image file (.JPG)
- PNG image file (.PNG)

If you plan to put your chart on a web page, you will need to save it in JPEG or PNG format.

When saved in **Genbox chart format**, charts can be reloaded back into Genbox, where you can view, zoom, and edit the chart, then save your changes again. If you plan to delete or add boxes, add annotations or lines, or reorganize the chart, saving in Genbox chart format is best.

The other three formats save the chart as an image file. You can load a saved image file into a graphics program, such as Adobe Photoshop, for further modifications. When an image file is saved, the current Chart View zoom setting will affect the size of the image: before saving the chart, change the zoom setting to the size you want for the chart. Also, the color mode of the display (256 color or full color) will affect the format of the saved image file.

The **BMP image format** is uncompressed. While it is not suitable for use on the Web, you may find it useful to save charts in this format if you plan to process them further in a graphics program. BMP image files tend to be huge.

The **JPEG format** works best when your chart contains lots of pictures, or has a background picture, because its compression methods are designed for those types of images. For line-oriented drawings, such as normal Genbox charts, its compression does not work as well. Unlike BMP and PNG formats, JPEG format is "lossy"; some of the pixel colors will be off, producing "noise" that is particularly visible if you zoom in on the image.

The **PNG format** has the best compression for Genbox charts, and is most suitable for producing charts for the Web. Unlike JPEG, the compression used in PNG format is lossless, so the image file can be zoomed to a larger size with no visible artifacts. For the smallest image file sizes, set your display to 256-color mode first, then save the chart in PNG format.

Note: large charts require more computer memory in order to produce. You will get an error message "Insufficient memory to save image file" if you do not have enough memory. In this case, try choosing a smaller zoom setting, make a smaller chart, switch your display to 256-color mode first, or use PNG format instead of JPEG or BMP. Remember, larger files also take longer to download from the web.

It is also possible to save most charts in **Portable Document Format (PDF)**. A number of third-party companies provide specially-designed printer drivers that, instead of printing a document, produce a file in PDF format. With one of these products installed, you can produce Genbox charts in PDF format.

Chart Examples

- [Ancestor](#)
- [Descendant](#)
- [Related](#)
- [Convergent](#)
- [Everyone](#)

Making Reports

A **report** is a rich text document that is generated from your data, according to a wide range of formatting, layout, content, and style options. They can contain the same data as a chart, but presented in a narrative format. They can be illustrated with images of people, places, source documents, and even charts. You can preview your report onscreen, and make changes or additions.

Making a Report

Hint Before making a report based on an individual, move to the individual on the Individuals View that you wish to be the default "key" for the report.

To make a report, begin by going to the Reports Menu and pointing to one of the general report types:

- [Ancestor Narrative](#)
- [Pedigree](#)
- [Descendant Narrative](#)
- [Outline Descendant](#)
- [Family Group](#)
- [Individual Narrative](#)
- [Calendar](#)
- [Individuals](#)
- [Places](#)
- [Events](#)
- [Citations](#)
- [Sources](#)
- [Media](#)
- [Researchers](#)
- [Correspondence Log](#)
- [Research Targets](#)
- [Projects](#)
- [Lists](#)

A submenu of specialized report types will appear. Click either **Basic** or one of the specialized report types.

The [Report Options View](#) will open. It displays several pages of options:

[Key Page](#)
[Front Page](#)
[Sections Page](#)
[Back Page](#)
[Headings Page](#)
[Content Page](#)
[Content Page \(Custom Reports\)](#)
[Content Page \(Calendar Reports\)](#)
[Sort Page \(Custom Reports\)](#)
[Media Page](#)
[Media Page \(Calendar Reports\)](#)
[Style Page](#)
[Detail Page](#)
[Format Page](#)
[Frames Page](#)

Each report type has default settings. You can change any of the options you wish.

Finally, click the **Make Report** button. After a progress window is displayed, the Report View will open, displaying your report.

You can scroll around, zoom, add pictures, annotations, and lines.

If you don't like the options you picked, you can close the Report View, go back to the Report Options View, change some options, and click **Make Report** again. Experiment and have fun!

Saving Reports

When you are satisfied with the appearance of your report, you can save it or print it. You can reload your saved reports later for viewing or editing. Format choices for reports are:

- **Genbox format (.GRT)**. This format requires Genbox to view. Use this format if you plan to view or edit your report later with Genbox.
- **Rich Text format (.RTF)**. This format can be opened by Genbox and most text editors, including Microsoft Word and Corel WordPerfect.
- **Text format (.TXT)**. In this format, the report is saved in plain ASCII text. **Note:** multimedia and most formatting is lost. Use this format only if you plan to load it into another application that does not support Rich Text format.

It is also possible to save reports (and most charts) in **Portable Document Format (PDF)**. A number of third-party companies provide specially-designed printer drivers that, instead of printing a document, produce a file in PDF format. With one of these products installed, you can easily produce Genbox reports and charts in PDF format.

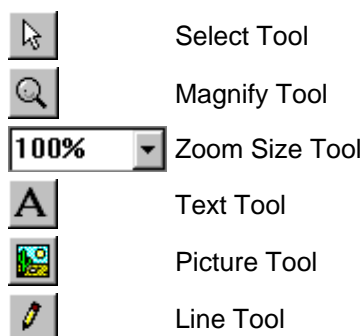
You can also configure Genbox to open the reports it generates directly in your default rich text editor, instead of the Report View. Then you have full editing capabilities at your control, as well as additional printing and report format options.

Genbox reports can also be generated in **HTML format (.HTM)**, ready for uploading to the internet. This option is selected by clicking the **Make web pages** check box before making the report. The generated report can be previewed in either Genbox or in your default web browser.

Viewing and Editing Reports

Once a report has been produced, the **Report View** window opens and displays the report.

The **Report Toolbar** will appear next to the main toolbar. It provides several options for editing the report. You can add text annotations, lines, and picture boxes. You can also select boxes for deletion. When boxes are deleted, the chart will resize automatically.



Sharing Your Information

The very nature of genealogy--finding relationships between individuals--suggests that research efforts should be collaborative. Once you have labored to produce proper source citations for your data, it would be valuable to the next researcher who otherwise might repeat your work. Likewise, much can be gained from the research of others when their results intersect with your own objectives.

When you have your data ready to share with others, you can copy a portion of it to an external file, a process known as **exporting**. The process of loading data into your database from an external file is known as **importing**.

Exporting Data

Data in a Genbox database can be exported to a new Genbox database, or to a file in GEDCOM format, a standard for information exchange between genealogy programs. Options for export are set on the [Export Options View](#). Genbox can write virtually all of its data in GEDCOM format, using the extension capabilities of the standard. However, only another Genbox system is likely to understand the data in the extensions, while other genealogy programs will import only the standard portion.

If your intended destination program is another Genbox system, you can export the data into a new Genbox database, which will be more compact than a GEDCOM file.

Importing Data

Data can be imported from a GEDCOM file or from another Genbox database. Importing is controlled by the [Import File View](#).

- **To import data from a GEDCOM file**, click Import Data on the File menu, then set the "Files of type" pick control on the File Open Dialog to "GEDCOM File". Select the desired GEDCOM file, then click the **Open** button. The [Import File View](#) will appear.
- **To import data from a Genbox Database**, click Import Data on the File menu, then set the "Files of type" pick control on the File Open Dialog to "Genbox Database". Select the desired database, then click the **Open** button. The [Import File View](#) will appear.

When you are considering importing data into your main database, it is a good idea to first load it into a new, empty database, so that it can be studied first. You may decide the data is not useful after all, or that only a portion of it will be useful. Then you will be better prepared to import the data into your main database. If you want to import only a portion of it, you can export the desired portion from your trial database, and use that file as your import source.

Publishing on the Web

Another way to share your data is to generate text reports based on it, then distribute the reports, rather than the data file itself. A low-cost method to disseminate information widely is to **publish it on the web**, by uploading it to a web site and then making the web site location widely known.

Genbox reports can be produced directly in HTML format, ready for uploading to the web.

Making a CD

Another popular way to distribute genealogy data is on a Compact Disk (CD). Writable CDs are inexpensive and durable, and can hold 600 MB of information.

Customizing Genbox

Recognizing that each user will have language preferences, stylistic preferences, and specific data collection purposes, Genbox provides a number of ways that the program can be customized. The fonts, window background colors, date formats, data flag definitions, event and source templates, and chart and report submenus, as well as other options, can all be controlled by the user.

[Preferences View](#)

[Data Setup View](#)

[Sentence Templates](#)

[Source Templates](#)

[Charts and Reports Submenus](#)

Details on how to change Preferences and Data Setup can be found in the Views section of the manual. Refer to the Table of Contents on where these sections are located.

Sentence Templates, Source Templates, and Charts and Reports Submenus are described on the following pages.

Sentence Templates

A **template** is a text framework that defines how data values should be formatted into sentences for presentation on charts and reports. Templates are often predefined for various types of data, then selected automatically according to type, so that a report with flowing narrative text can be quickly and elegantly produced. You can also customize templates for use with each data record.

The template itself normally does not contain any data values. Instead, it includes one or more "placeholders", called **field codes**, that define which data values are to be used, where and when the data values should appear, and how the data values should be formatted. A single template can define different sentence structures according to which data values are available at the time the template is applied.

Each event type has one or more predefined templates, for one or several languages, and each individual event can have its own custom template, plus there is a global event template. Also, general notes and research notes can include custom templates. Together, these options provide for a great degree of customization.

Source citations have their own set of template codes which are explained in the section [Source Templates](#).

Introduction

Here is an example of a simple event template:

[P] was born **[D+L]**

The text portions enclosed in square brackets are called **field codes**. The field codes will be filled with values from the database when a chart or report is produced. "[P]" stands for PRIMARY, and will be filled with the name of the primary individual. "[D+L]" stands for DATE and LOCATION. So, if the Birth event record for "Reginald Smythe" contained a date value of "3 August 1780" and a place value of "Little Chesterford, Essex, England", then this data would be formatted on a narrative text report using this template as:

Reginald Smythe was born **3 August 1780 in Little Chesterford, Essex, England**.

The template controls the order and inclusion of data values. Suppose the template was changed to the following:

[D], **[P]** was born to **[PP]** father **[O]** and **[PP]** mother **[S]**.

The field code [PP] is possessive pronoun, [O] and [S] for a birth individual are father and mother, so the data would now be formatted as:

On 3 August 1780, Reginald Smythe was born to **his** father **Sir Charles Smythe** and **his** mother **Jane Edwards**.

We moved the date to the front of the sentence, left out the location completely, and added the parents, all by changing the template; the data was unaffected.

Conditional Groups

Templates can have optional parts which are included only if the corresponding data value isn't blank. **Conditional groups** are marked with angle brackets, as in this example:

[PP] marriage < to **[S]**> was annulled **[D+L]**

In this example, the word "to" will be included only when the spouse is non-blank, because it appears within the same angle-bracketed group as the field code [S]. This leads to two possibilities on a report, depending on whether the SPOUSE box is filled:

His marriage was annulled **on 10 August 1803 at Chancery Court, London**.

His marriage to **Elizabeth** was annulled **on 10 August 1803 at Chancery Court, London**.

If you would like some text to appear only when a data value is NOT present, this can be accomplished in an angle-bracket group using the vertical bar to separate the two possibilities, as in the following example:

<[D], >[P] purchased <[T] | land> [L]

In this example, the word "land" will appear only for event records where the "detail" data value is empty.

Use conditional groups whenever there is wording that would appear out of place if the data value is blank.

Balancing Conditional Groups

Whenever you open a conditional group with a left angle bracket, a matching right angle bracket must appear later in the template. Conditional groups can "nest", which means a conditional group can appear completely within another conditional group. Sometimes, you may forget to include a left or right angle bracket for one of your conditional groups. When a report is generated, the program will detect a conditional group that is not balanced. It will place a warning message in the output at the point the error was detected. Possible messages include:

- *STACK UNDERFLOW* - an opening "<" angle bracket is missing (a closing ">" angle bracket was found without a matching "<" bracket).
- *STACK OVERFLOW* - a closing ">" bracket is missing (a opening "<" angle bracket had no matching closing ">" bracket).

Directional Templates

Event data for an individual appears on the "Events" tab. But because event records can be shared by up to three individuals, an Events record entered for one individual may automatically appear as a record on the Events tab of up to two other individuals. For example: suppose a marriage event for Reginald Smythe is entered, with a date of 15 July 1803 at Burnt Pelham, Hertfordshire, England, and the spouse is entered as Elizabeth Conyer. Later, when you are looking at the data for Elizabeth Conyer, you will see that she has a marriage event record, with the same date and place, showing a spouse by the name of Reginald Smythe. This is another view of the same event record, except that the viewpoint has changed. Elizabeth is now considered PRIMARY, and Reginald is the SPOUSE.

This change in viewpoint is key to understanding how the event templates are used. Most event types have a single template defined, as most event templates work equally well when PRIMARY and SPOUSE are switched, such as "[P] married [S]". Other event types have two templates defined: a "Forward" and a "Reverse" template. The Reverse template is used when the viewpoint is changed. Consider this template:

[P] proposed <to [S]> [D+L]

Reginald proposed to Elizabeth in July, 1803.

If the template is not changed, this event record when viewed from Elizabeth's viewpoint would read:

Elizabeth proposed to Reginald in July, 1803.

This problem can be corrected by defining and using a "Reversed" template:

[P] received a marriage proposal <from [S]> [D+L]

Elizabeth received a marriage proposal from Reginald in July, 1803.

Or, another possibility:

<[S] | an unknown gentleman> proposed to [P] [D+L]

Reginald proposed to Elizabeth in July, 1803.

It is important to craft the templates so that they read equally well when data is missing. Suppose we knew Elizabeth had received a proposal but don't know the name of her suitor. The two template examples above would produce the following alternatives:

Elizabeth received a marriage proposal in July, 1803.

An unknown gentleman proposed to Elizabeth in July, 1803.

Empty Templates

Even though the event templates provide a lot of flexibility in formatting the event data into sentences for use on a narrative report, in some cases you may wish to override the template behavior altogether, and just format the event information yourself.

There are two ways to override the default template behavior:

- **Method 1:** Edit the template, replacing any template codes with the text you want.
- **Method 2:** Set the template to just "[G]" or "[R]" (and optionally "[CR]"), then type the formatted text you want into the general notes (or research notes).

For Method 2, the narrative report generator will assume the notes text is already formatted as desired, and no terminating punctuation will be added. This means you should format the notes text into complete sentences, including a period at the end.

When using Method 2, the [global event template](#) will also be overridden. This means any data normally included by the global template, such as witness information, will only be included if you add the template codes to your notes text.

Witness Templates

Witnesses are individuals present at an event that are not (usually) one of the principal participants (primary, spouse, child/other). At a wedding, the witnesses would include the minister, priest, or judge; groomsmen, bridesmaids, and guests.

The template codes used for witness data include:

- [W] witness name
- [WR] witness role
- [AW] age of witness at time of event
- [WW] list of all witnesses in comma-separated list
- [WWR] list of witnesses in comma-separated list, with role names.

Witness data can appear in **two different ways** on a report:

- When the current individual is one of the principal participants, the witnesses appear as extra detail information added to the event, according to the **event template**.
- When the current individual is a witness, the witnessed event can be included along with other events, formatted according to the **witness template**.

Let's consider a witness to the signing of a will by Archibald Cummins, named **Henry Smith**. A sample event template is shown below:

[P] signed a will [D+L]<. Witnesses: [WW]>

Archibald signed a will 12 March 1856. Witnesses: **Henry Smith**, Carla Johnson, Jonathan Doe.

Here, we have part of the paragraph about Archibald Cummins, who signed a will in 1856 with three known witnesses. The three witnesses entered for the WILL event are included in the report with the information about the event, because the template uses the template code [WW].

For an example of the second case, a sample witness template is shown below:

[W] <witnessed | was the [WR] at> the will signing of [P] [D+L]

Henry Smith witnessed the will signing of Archibald Cummins on 12 March 1856.

Here, we have part of the paragraph for Henry Smith, who was a witness when Archibald Cummins signed his will in 1856. A similar line would be added in the individual paragraphs for Carla Johnson and Jonathan Doe.

Note that when constructing a witness template instead of the main event template, the [W] code is used to refer to the **current individual** (the witness).

Witness Template Codes

When constructing templates for displaying witness data, you can use either numeric values or role names appended to the template codes W and WR to refer to specific witnesses. For numeric values: [W1] would be the first listed witness to an event; [WR3] would be the role entered for the third listed witness to an event, and so on. Referring to witnesses by numeric value is most useful when witnesses for a particular event type are entered in a predefined order.

Witnesses can also be referred to by their role names, following a colon, as in: [W: maid of honor] and [W: minister]. Be sure to use the singular role name. If there are multiple witnesses with the same role, such as for [W: groomsman], then only the first witness with that role will be returned. If you want all witnesses of a particular role to be returned in a comma-separated list, use the double-W version: [WW: groomsman] or [WWR: groomsman].

Witness List Template Codes

There are two **witness list** template codes:

- [WW] returns a list of all remaining witnesses in a comma-separated list, with "and" before the last witness name in the list.
- [WWR] returns a list of all remaining witnesses, with role names included, if any. Witnesses are grouped by role.

The [WW] and [WWR] template codes only return witness names that haven't been already mentioned by another witness template code. This allows them to be used as a "catch-all" following role-specific template codes, as in: <Minister: [W: minister]> <Bridesmaids: [WW: bridesmaid]>< Groomsman: [WW: groomsman]>< Other witnesses: [WWR]>.

Singular or Plural Witness Lists

When constructing a template for witnesses, you may want to specify different text when there is just one witness. You might want to use the singular form of a verb. This can be accomplished by using specialized versions of the [WW] or [WWR] template codes: a trailing **single quote (')** **qualifier** to indicate singular, and a trailing **double quote (")** **qualifier** to indicate plural:

- [WW] list of all remaining witnesses
- [WW'] "list" of remaining witnesses, when **exactly one** witness left
- [WW"] list of remaining witnesses, when **two or more** witnesses left
- [WWR] list of all remaining witnesses, with role names
- [WWR'] "list" of remaining witnesses with role names, when **exactly one** witness left
- [WWR"] list of remaining witnesses with role names, when **two or more** witnesses left

For example:

<. The only witness was [WW']. The witnesses were [WW"]>

Here, the [WW'] template code will activate the first text ("the only witness was ...") when there is one witness. If there are two or more witnesses, the second text will appear ("the witnesses were ..."). If there are no witnesses, neither will appear.

The single-quote and double-quote qualifiers can also be used when specifying role names:

<. Surprisingly, there was only one groomsman: [WW':groomsman]]. The groomsmen were [WW":groomsman]>

To help remember the template code qualifier syntax, read the single quote as "single", so that [WW'] is read "witnesses - single".

The Current Witness

For a witness template, the [W] code naturally refers to the current individual. But when constructing regular event templates, a [W] code without a numeric or role variable will instead refer to the **current witness**, which is the last-named witness. Thus, you could have a construction like

<Serving as best man was [WW': best man]. Unfortunately, [W] lost the ring>

Here, the [W] code refers to the witness that filled the [WW': best man] template code. It would result in an output like the following (bold emphasis added):

Serving as best man was **John Runner**. Unfortunately, **he** lost the ring.

Event Subtype Templates

In addition to the default forward/reverse templates, event types can have any number of additional templates. Additional templates can be defined for named **subtypes** of the current event type on the Event Templates Page. The choice of template can then be made from a pick list before the event sentence on the Events Page.

Event Templates for Multiple Languages

Each event type is defined for a particular language. By defining multiple event types with the same tag (key value) but with different language codes, it is possible to produce reports in different languages simply by changing the selected output language in preferences. The program will use the templates from the event type records with the specified language when formatting event data into sentences.

The event subtypes work the same way: when multiple subtypes have been defined with the same subtype name but for different languages, the correct language variant will be used on the reports.

For event roles, a similar selection process occurs. For each of these three template sources (Event Types, Event Subtypes, Event Witness Roles), there is a language-invariant key field that groups the records by content, allowing the report generator to pick the correct variant according to language.

Note For a custom event template sentence stored in an event record, no automatic translation is possible. If translation is desired, convert the custom event template into an event subtype, then define the language variants on the Event Types View.

Base Language Templates

Instead of selecting a particular language, it is possible to define event templates for a **base language**. A base language can be considered the subset of language features in a language family that are the same. These features are **shared in common** by the language variants. Base languages are not real languages, but they are useful when defining templates that will not vary across many of the language variants in a language family.

For example: consider the **English** language family. Some of the language variants in this family are:

- English (United States)
- English (United Kingdom)
- English (Australia)
- English (Canada)
- English (Ireland)
- English (New Zealand)
- English (South Africa)

Defining and maintaining a full set of event templates for each of these language variants would be tedious, time consuming, wasteful of storage space, and prone to error. The solution is to define the templates in the

English base language. Then only add additional templates in a sublanguage when they differ from the base language template.

When a report is produced, the program will select the **best** template to format the event data. It will look first for an event type record defined in the currently selected output language. If not found, it will then look for an event type record defined in the base language. If still not found, it will look for an event type record defined for another language variant in the same language family. The full search list appears below:

- Output language
- Base language of output language
- Any language in same family as output language
- EN English
- ENU English (US)
- Any English language
- Any base language
- Any language

With this search order, the data will always be output.

All base languages are represented with a two-letter code, such **EN** for English. All specific languages are represented with a three-letter code, such as **ENU** for English - United States.

Base languages can only be selected for use in data records (event types, subtypes, roles; identifier types; flag definitions). Choices for program language and output language still require a specific sublanguage selection, whenever there are more than one for a language family. So for a report in Norwegian, you would select one of the two language variants (NOR (Bokmal) or NON (Nynorsk)) as your output language.

Special Templates

There are two special event templates for each language:

- Global Event Template
- Initial Event Template

These templates are used for special processing.

Global Event Template

The **Global Event Template** affects all other event templates. It provides a convenient place to put portions of the templates that are in common to all event sentences. The keyword [...] is used to indicate where the results of the local event template are to be placed. It allows the global template to position elements both before and after the local template's results. The default global template is:

```
[...]<. Witness: [?WWR']. Witnesses: [?WWR]>
```

This global template says: if there are witnesses that weren't already shown in the local template, add them in a sentence beginning either with "Witness: " or with "Witnesses: ", depending on whether there is one or several. By defining this portion of the sentence template in the global template, it does not need to be repeated for every event template. Also, it is easy to make a change to the global template to affect all the templates at once. You could change the "Witness:" text to "Also present:", for example. Or, you could add "[CR][CR]" to the end, which would separate all event sentences in narrative reports with a blank line.

For the Global Event Type record, only the template itself can be edited; all other fields are disabled.

Note: the inclusion of the general notes after an event sentence is not handled by the global template; it is determined by the report options settings, which controls whether the general notes are shown in the text, in a footnote, or omitted. To override this default behavior for a local event template, use [!G] (see the discussion below).

Initial Event Template

The **Initial Event Template** is used to initialize new event types, both when adding on the Event Types View and when new event types are detected in a GEDCOM import file. To use, set the values to those that new event types should have. The defaults are:

- Secondary type: Text
- Class: Mature/default
- Flags: Recent
- Template: [P] participated in [E] [D+L]
- Witnessed Event Macro: the [E] of [P] [D+L]
- Witness Default Role Template: [W] <witnessed|was the [WR] at> [WE]

Variable Control Parameters

Because the same template codes may be used in both the global event template and the local event template, two special **variable control parameters** have been defined.

Question Control Parameter

Suppose you want witnesses, if any, to be shown after every event sentence. You add something like: <. Witnesses: [WWR]> to the global template. But then suppose you have an event where you want the text to be different: "<. Also appearing on the census were [WWR]>". You add this to the local template. But now you are getting the witnesses shown twice; once from the local template and once from the global template. How do you prevent that?

The **Question control parameter** has been defined for this purpose. The control parameter is a question mark (?) that appears inside the field code's brackets, either before or after the keyword, as in: [?WWR] or [WWR?]. It means "if this field code has not already appeared". When used in the global event template, it will suppress template codes that have already appeared in the local template. It can be used on any field code.

Note: the global template is processed **after** the results of the local template have been processed. This affects the interpretation of the variable control parameters. A global template of "<Primary ID: [?PID] >[...]" would show the ID of the primary individual only when it was not included in the local template itself, because the local results are processed first and become what has "already appeared".

The question control parameter can also be used in the local template.

Exclamation Control Parameter

Suppose you have a sentence where you don't want the default witness sentence to appear, but you also don't want to use the [WWR] code because, perhaps, you are referring to each witness individually with the [W1], [W2], etc. codes. To accomplish this, include the [!WWR] code in the local event template. The **Exclamation control parameter**, which is an exclamation mark (!), means "NOT" or "do not show" or "mark as hidden". The parameter is placed inside the code's brackets, either before or after the keyword, as in [!WWR] or [WWR!]. Unlike the Question control parameter, the meaning is different, depending on the side it is placed:

- If the exclamation mark appears **BEFORE** the keyword, then the corresponding data is considered "blank" and never shown.
- If the exclamation mark appears **AFTER** the keyword, the corresponding data is shown, but then it is marked as blank, effectively suppressing it for any following references.

For most purposes, you will want to put it **BEFORE** the keyword.

This control parameter is effective for suppressing the default inclusion of the general notes, by using [!G] in the local event template.

Case Qualifiers

The base codes [P], [S], [O], [W], and [I] (primary, spouse, other individual, witness, individual) can be modified by appending **case qualifiers**. A case qualifier identifies the sentence case in which the individual appears. This controls the choice of pronoun when a pronoun is to be used.

- **Possessive: P**

- **Nominative:** N
- **Direct object:** D
- **Indirect object:** I
- **Reflexive:** X

Possessive Case

The possessive case qualifier "P", used with one of the individual base codes for [PP], [SP], [OP], [WP], [IP], produces "his" and "her" in English, as well as constructions like "John's".

Nominative Case

Nominative case is used for the subject of the sentence. This is the default case when no qualifier is specified. The nominative case qualifier is "N", and is used with the individual base codes for [PN], [SN], [ON], [WN], [IN]. It produces "he" and "she" in English.

Direct Object

The direct object qualifier is "D", and is used with the individual base codes for [PD], [SD], [OD], [WD], [ID]. It produces "him" and "her" in English.

Indirect Object

The indirect object qualifier is "I", and is used with the individual base codes for [PI], [SI], [OI], [WI], [II]. It produces "him" and "her" in English.

Reflexive Case

Reflexive case produces "himself" and "herself" in English. The reflexive qualifier is "X", and is used with the individual base codes for [PX], [SX], [OX], [WX], [IX].

Gender Qualifiers

The base codes [P], [S], [O], [W], and [I] can be modified by appending **gender qualifiers**. A gender qualifier designates the gender of the individual that is required to fill the template code. By using conditional angle-bracket portions for each gender, it is possible to have different text to appear for different genders. This approach permits the surrounding words to be inflected properly for the gender.

The gender qualifiers are **m**, **f**, **u**, **o** (male, female, unknown, other). They are added inside the closing bracket, appearing after any case qualifier. For example: [Pm] would match a primary male; [Sf] would match a female spouse.

A keyword without a gender qualifier will match an individual of any gender. Because Genbox supports four genders instead of two, a good approach might be to construct sentences of the form <[Pf] ... | [P] ...>, so that the first section would work for a female, and the second section would work for a male but also those labeled "other" or "unknown". That way, output for the two extra genders will be produced without the extra burden of needing to construct 4-way groupings every time.

Case and gender qualifiers can be combined, for field codes like [PNm], [SDo], [WXf], etc.

ID Parameters

Several field codes can be appended with a **numeric value**. This value is often the ID value of a record in the database. By using a record ID with a field code, the data in a particular record can be referenced. For example:

John's hero when growing up in the backwoods of **[L456]** was his grandfather, **[I289]**. He called his grandfather "**[N1392]**".

Here, **[L456]** would be replaced with the standard name for place record 456. **[I289]** is the preferred name for individual record 289, and **[N1392]** is one of his name variants.

The use of ID parameters with field codes is particularly useful when adding field codes to notes. If no ID parameter is included, the value for the current context is returned, if any. For event templates and event

notes, the current context is the event record. In that context, **[L]** would be the location of the event, and **[N]** would be the linked name variant, if any.

Subpart Numbers

Some data values can be further divided by a **subpart number**. The subpart number **precedes** the field code, so that it is not confused with an ID parameter. Subpart numbers are supported by the L, D, and E base codes:

- 0L place modifier
- 1L local site
- 2L city/town
- 3L township
- 4L county/parish
- 5L state/province
- 6L nation/area
- 0D date qualifier
- 1D date without the qualifier (use DD, DM, DY for further division into day, month, year parts)
- 0E leading indefinite article on the event name (in English: "a" or "an")
- 1E event name without the leading article

In general, subpart numbers divide data values left to right, so the "0" part is the first part of the data value. If a subpart has no value, it will be empty.

"Hide Value" Modifier

When parentheses are placed inside the square brackets, as in "[(Pm)]", then the value, if any, is not included in the sentence. This modifier is useful when constructing conditional phrases: it allows a template code to be used in the sense of "if this field code is not blank, then..." without actually outputting the field code value. For example, you could have:

This event is about< a male.[(Pm)] a female.[(Pf)]>

and only the correct phrase would appear, without showing the actual name of the primary.

Special Characters

The template system and privacy system define special meanings for the following characters:

{ } [] < > |

To treat any of the special punctuation characters as normal text, precede each with a backslash, as in:

\{these braces and text will print\}. The field code \[P\] is used often. \>\>\> Look at this!

The backslash will print normally when it is not followed by a punctuation character or space. This lets you enter filenames into notes, such as:

c:\program files\Genbox Family History\Genbox.exe

without needing to double the backslashes (although you can for the same result).

If you want to have a backslash showing before a punctuation character or space, add an extra backslash: "\\\" will show as "\".


Also, runs of spaces are normally reduced to one space; if you want to force two or more spaces, precede the extra spaces with a backslash: "This is far \\ apart" will print as "this is far apart".

Entering TAB

To enter a tab character, simply press the TAB key.

How to Add Field Codes

To add a field code, first position the text cursor at the proper location, then do one of the following:

- Type it in directly, or
- Open the [Insert Field Code Dialog](#) by clicking  on the toolbar, or by typing **CTRL+D**.

If your text cursor is positioned inside an existing field code with the Insert Field Code Dialog is opened, it will become the default value, and any changes will replace the existing field code when the dialog closes. This allows you to edit existing field codes. The information provided by the dialog also provides a way to remind yourself of what a particular field code does.

Field Codes in Notes

Field codes can be used in the general notes and research notes for individuals, events, identifiers, and other data records. By using field codes instead of typing the data values directly, reports can properly index the names and places, data can be highlighted, and any corrections to spelling will be automatically reflected.

When using event field codes in notes, special consideration must be taken to ensure the correct values are returned. The general guideline is:

- Event field codes in an event note will always be interpreted in the context of their **native** event.

If the general note of Event 123 has the field code [GE345], then the general note for event 345 will first be interpreted in the context of event 345, then the result will be inserted into the general note of event 123. Thus, if the general note for event 345 has a [D] code, the value will be the date stored in event 345, not the date shown in event 123.

Principal References in Notes

The field codes [P], [S], and [O] are not recommended for use in event notes, because the value of these codes can change depending on the focus individual. Instead, use [P1], [P2], and [P3] to refer to each of the three principals of an event: Primary, Spouse, and Other/Child. The values returned by these field codes will not vary according to the current focus individual.

Template Code Reference

For a full list of sentence template codes supported by Genbox, see the section [Sentence Template Code Reference](#).

Source Templates

Genbox has a sophisticated source template system used during narrative report production to produce flowing citation and bibliography text from source data records. Citation records define the links between data records and sources, and each source is identified as a particular source type. Each source type has its own set of three templates: for use in primary citation references, in secondary references, and in bibliographies. Each individual source record can also have its own set of customized templates. Also, there is a global set of templates.

Source Template Levels

Source records have a characteristic known as "level" that determines whether they represent a document, a document in a higher source, or a source. In general, document-level source records represent unpublished works with limited distribution, and source-level source records represent published works intended for wide distribution. A "document in higher source" source record represents a named portion of a larger source. This source record will usually have a link to higher source record representing the larger source.

When sources are linked to a higher source, the templates used in a citation will be those of the FIRST (lowest) source, which is linked directly to the citation record. For example: if a citation is to a document, which itself is in a book, the templates used will be those defined for the source record of the document, and not those for the source record of the book. The template can draw on data in both the current source record and the higher source record. Template codes that refer to the lower level source generally begin with "DOC", while codes that refer to the higher source record generally begin with "SOURCE". Publication facts are assumed to come from the higher source record, and begin with "PUB". Codes can also begin with "REPOSITORY" to refer to the repository of the source. For document-level sources that do not link to a higher source, codes referring to a higher source should not be used, and for source-level sources, codes referring to a lower source should not be used.

Here is the primary template for the source type "Book", which is a source-level source type:

```
<[SOURCE AUTHOR], <[SOURCE AUTHOR TYPE], >>[ITAL][SOURCE TITLE][ITAL0]<,  
[SOURCE QUALIFIER]> (<[PUB ORIGINAL DATE]; reprint, >[PUB PLACE]: [PUBLISHER],  
[PUB DATE])<, [CD]>.< [SOURCE NOTES]>
```

The text appearing in square brackets represent field codes that will be filled with values from the source record, except for "[CD]" which stands for Citation Detail; it will be filled with data from the citation record.

Templates can have optional parts which are included only if the corresponding data value isn't blank. Optional parts are marked with angle brackets. In this book example, the "reprint" text will appear only if the [PUB ORIGINAL DATE] field is not blank. The [SOURCE AUTHOR TYPE] text is also optional, and it is nested within another optional part controlled by [SOURCE AUTHOR]. This means that if the author field is blank, then the author type will also be omitted even if it has a value.

Here is the secondary reference template for the source type "Book":

```
<[SOURCE AUTHOR], >[ITAL][SOURCE TITLE][ITAL0]<, [CD]>.
```

Secondary references are usually shorter than primary references. By having a separate template, you can directly control which elements are omitted or shortened.

Likewise, bibliographic entries are controlled by their own templates:

```
<[SOURCE AUTHOR]<, [SOURCE AUTHOR TYPE]>. >[ITAL][SOURCE TITLE][ITAL0]<.  
[SOURCE QUALIFIER]> <[PUB ORIGINAL DATE]. Reprint, >[PUB PLACE]: [PUBLISHER]<,  
[PUB DATE]>.
```

Note that citation detail and notes are omitted, and some punctuation has changed. Often, the order of elements is changed in bibliographic entries as well.

Consider the following primary template, used for a "Book Chapter or Part", which is a document-in-source source type:


```
<[DOC AUTHOR], <[DOC AUTHOR TYPE], >>"[DOC TITLE]"<, [DOC QUALIFIER]>, in  
[ITAL][SOURCE TITLE][ITAL0]<, [SOURCE QUALIFIER]><, [SOURCE AUTHOR]<,  
[SOURCE AUTHOR TYPE]>> (<[PUB ORIGINAL DATE]; reprint, >[PUB PLACE]:  
[PUBLISHER], [PUB DATE])<, [DOC LOCATER]><, [CD]><; [DOC NOTES]>.
```

Here, data fields in two source records are being referenced. The lower source record represents the book chapter, and the higher source record is for the book itself. The template starts with the author of the chapter (if any), followed by the chapter title in double quotes. The book title follows, in italics. Then the book author, and the publication information.

The actual fields that are filled in each source record will vary, according to the source type and the available data. The templates should be designed so that the resulting formatted text is correct even when many data values are missing. Punctuation separators between elements should be placed within angle bracket groups controlled by a data field code, so that when the data value is missing, the punctuation is also removed. Otherwise, extra commas, periods, and other punctuation may appear. Genbox can automatically remove some extraneous punctuation.

Global Source Template

The **Global Source Template** affects all other source templates. It provides a convenient place to put portions of the templates that are in common. The keyword [...] is used to indicate where the results of the local source template are to be placed. It allows the global template to position elements both before and after the local template's results. The default global primary source template is:

```
<[?LEAD TEXT] ><[?EXCERPT] >[...]<. [?DOC NOTES]]. [?SOURCE NOTES]>< [?ANNOTATION]>
```

This global template says: Include lead text if not in the local template; follow with the excerpt text if not in the local template; show the local template results; include the document notes or source notes, if not already included by the local template; end with the annotation text, if not already included in the local template.

The default global secondary template is:

```
<[?LEAD TEXT] ><[?EXCERPT] >[...]< [?ANNOTATION]>
```

The default global bibliography template is blank.

The global source template is also useful for diagnostic purposes. You can add <Citation ID: [?CITATION ID]> to the front, and then every one of your primary source citation footnotes will be labeled with the citation ID record number. This may help you identify where particular parts of a mysterious footnote are coming from.

Variable Control Parameters

Because the same variable code may be used in both the global source template and the local source template, two special **variable control parameters** have been defined.

Question Control Parameter

The **Question control parameter** is a question mark (?) that appears inside the field code's brackets, either before or after the keyword, as in: [?ANNOTATION] or [ANNOTATION?]. It means "if this field code has not already appeared". When used in the global source template, it will suppress template field codes that have already appeared in the local template. It can be used on any data variable.

Note: the global template is processed **after** the results of the local template have been processed. This affects the interpretation of "what has already appeared" for the variable control parameters.

Exclamation Control Parameter

The **Exclamation control parameter**, which is an exclamation mark (!), means "NOT" or "do not show" or "mark as hidden". The parameter is placed inside the field code's brackets, either before or after the keyword, as in [!LEAD TEXT] or [LEAD TEXT!]. Unlike the Question control parameter, the meaning is different, depending on the side it is placed:

- If the exclamation mark appears BEFORE the keyword, then the corresponding data is considered "blank" and not shown.
- If the exclamation mark appears AFTER the keyword, the corresponding data is shown, but then it is marked as blank, effectively suppressing it for any following references.

For most purposes, you will want to put it BEFORE the keyword.

"Hide Value" Modifier

When parentheses are placed inside the square brackets, as in "[(Pm)]", then the value, if any, is not included in the sentence. This modifier is useful when constructing conditional phrases: it allows a template code to be used in the sense of "if this field code is not blank, then..." without actually outputting the field code value.

Special Characters

The source template system defines special meanings for the following characters:

[] < > |

To treat any of the special punctuation characters as normal text, precede each with a backslash.

If you want to have a backslash showing before a punctuation character or space, add an extra backslash: "\\]" will show as "\]".

Also, runs of spaces are normally reduced to one space; if you want to force two or more spaces, precede the extra spaces with a backslash: "This is far \\ apart" will print as "this is far apart".

Entering TAB

To enter a tab character, simply press the TAB key.

How to Add Source Field Codes

To add a source field code, first position the text cursor at the proper location, then do one of the following:

- Type it in directly, or
- Open the [Insert Source Field Code Dialog](#) by clicking  on the toolbar, or by typing **CTRL+D**.

If your text cursor is positioned inside an existing field code with the Insert Source Field Code Dialog is opened, it will become the default value, and any changes will replace the existing field code when the dialog closes. This allows you to edit existing field codes. The information provided by the dialog also provides a way to remind yourself of what a particular field code does.

Source Template Code Reference

For a full list of source template codes supported by Genbox, see the section [Source Template Code Reference](#).

Charts and Reports Submenus

The **Charts** and **Reports** menus are used to select the options for chart and report production. Genbox has default options for each chart and report type. You can define your own options files and have them appear as submenu options on these menus.

There are two subfolders beneath the Genbox Main Folder that are used to define the submenus. These folders are named:

Chart Options Menu
Report Options Menu

Chart Options Submenus

The "Chart Options Menu" subfolder contains the Genbox chart options files (extension .GCO) that will appear as the choices on the five submenus of the Chart Options Menu. The filenames of some of the chart options files included with Genbox are listed here:

Ancestor Fan.GCO
Ancestor Right.GCO
Ancestor Ring.GCO
Descendant Fan.GCO
Shared Arrow.GCO
Shared Curvy.GCO
Shared Dignified.GCO
Shared Full Data.GCO
Shared On Lines.GCO
Shared Unboxed.GCO

The name of each chart options file determines both where it will appear on the submenus and what the text of the menu option will be. The **leading word** will determine the submenu. The remainder of the name will be used as the menu option. For example, consider "Ancestor Fan.GCO". The leading word in this case is **Ancestor**. The remainder of the name is "Fan". So in this case, a menu option "Fan" will be added to the Charts Ancestor submenu. When selected, the "Ancestor Fan.GCO" options file will be loaded. The leading word can be **Ancestor**, **Descendant**, **Related**, **Individual**, **Convergent**, **Everyone**, or **Shared**.

Shared Options Files

If the leading word of an options filename is **shared**, then the remainder of the name will appear as an option on **all five** submenus. This feature makes it easy to reuse an options file with multiple chart types. On the submenus, shared filenames will appear first, followed by the filenames specific to each submenu. For example, if the list of options files given above were the contents of the "Chart Options Menu" subfolder, then the "Ancestor" submenu would have nine menu choices: "Arrow", "Curvy", "Dignified", "Full Data", "On Lines", "Unboxed", and "Fan", "Right", "Ring".

Note: When you choose a menu option that is a shared options file, certain settings will be automatically set, according to the current chart type for which it is being used. This "tailoring" process makes shared options files more convenient, as settings that are required or nearly always used for a particular chart type are set for you automatically.

Report Options Submenus

The "Report Options Menu" subfolder contains the Genbox report options files (extension .GRO) that will appear as the choices on the submenus of the Report Options Menu.

The name of each report options file determines both where it will appear on the submenus and what the text of the menu option will be. The **leading word** will determine the submenu. The remainder of the name will be used as the menu option. For Report Options Files, the leading words are:

- Ancestor Narrative: **Ancestor**
- Pedigree: **Pedigree**

- Descendant Narrative: **Descendant**
- Outline Descendant: **Outline**
- Family Group: **Family**
- Individual Narrative: **Individual**
- Calendar: **Calendar**
- Individuals: **Individuals**
- Places: **Places**
- Sources: **Sources**
- Media: **Media**
- Researchers: **Researchers**
- Correspondence Log: **Correspondence**
- Research Targets: **Research**
- Projects: **Projects**
- Lists: **Lists**

Note: If the **Shared** leading word is used, the report options file will appear on the submenus for the first six report types (Ancestor Narrative, Pedigree, Descendant Narrative, Outline Descendant, Family Group, Individual Narrative).

Managing your Data

A number of utilities have been included to help you manage your database. The **Backup** and **Restore** operations are part of routine maintenance. A number of utilities are provided for detecting and correcting problems with the structural integrity of the database file. Finally, the **Problems Spotter** and **Match Finder** utilities help you manage the content of the database.

Backing Up your Data

The importance of regularly backing up your genealogy data files cannot be overstressed--your computer's hard drive could fail at any time, wiping out your Genbox database along with everything else in your system. You don't want to lose all your hard work. By making a backup and saving it to offline storage, you will have the confidence in knowing your valuable data is safe. A backup is also important in the event you inadvertently delete data you intended to keep.

All files that contain data or settings should be backed up. This includes the main database files (extension .GDB), media files, options files (extensions .GCO, .GXO, .GRO), query files (.GQY) and any source GEDCOM files (.GED). You may also wish to back up your saved charts and reports (.GCT, .GRT, .RTF).

Backup files are saved in standard ZIP format.

1. To make a backup file, on the **File** menu, click **Backup**. The [Backup Select Files Dialog](#) will appear.
2. Select the files you want to back up, then click **Add**. The [Save File Dialog](#) will appear.
3. Enter a name for your backup file, then click **Save**.
4. To really add safety, you should copy your backup file to a floppy disk or writable CD, then store it at a different site.

To decide when you should make a backup, consider how much work would have to be repeated if you suddenly lost your hard drive and had to return to the last backup. If you've done little since the last backup except view data and make charts and reports, you can wait. Once you've invested some time entering data, it's time for another backup.

Restoring from a Backup File

A backup file is in standard ZIP format. You can use WinZip and other ZIP utilities to open and view it. You can also open it with Genbox.

1. To restore from a backup file, on the **File** menu, click **Restore**. The [Open File Dialog](#) will appear.
2. Select the backup file (extension .ZIP), then click **Open**. The [Restore from ZIP File Dialog](#) will appear.
3. Enter the desired destination folder to restore the files to, and other options.
4. Click **Restore**.

Be careful about the destination directory. It is a good idea to create a new folder to restore the files to, rather than overwriting existing files of the same name. That gives you an opportunity to check the restored files and see if they are what you expected. It also allows you to select just a few of the restored files and copy them to their correct destinations, in cases where you aren't interested in restoring all the files.

Checking the Structure of your Database

A Genbox database is in Microsoft Jet database format, the same format that is used by Microsoft Access 2000. If Genbox is terminated abnormally, it is possible for the database file to become corrupted. You may get an error message when trying to open the database, or an error may occur later when you try to access a particular data table.

When you suspect a database may be corrupted, you can **check its structure**. Genbox will compare the structure of the selected database file with an internal copy of the correct structure, and report any detected problems. You will then be asked if you want the damage repaired. Genbox will then repair the file for you, and then you will be able to use it normally.

1. To check the structure of a Genbox database, on the **File** menu, click **Repair/Compact**. The [Open File Dialog](#) will appear. Enter the name of the database file you want to repair. The default filename will be the current Genbox database.
2. Click **Open**. The [Repair/Compact Dialog](#) will open.
3. Click **Check Structure** to see if the database needs repairing.
4. If the file is okay, the message "Data Structure Verified, No problems detected" will appear.
5. If problems are detected, you will be given a summary of the problems, and asked if you want to correct the problems. Click **OK** to have the problems automatically corrected.

Compacting your Database

When a record is deleted in a Genbox database, the space it occupied in the file is not automatically reclaimed. These "holes" remain in the file, and will be reused as new records are added. If you have made a large number of deletions, however, you may wish to **compact** the file, which will make it physically smaller by removing all the holes. Compacting has other benefits, as well. Records are written out in primary key order, which can speed up data retrieval. Record counts in the tables are also updated, which can fix abnormal program behavior caused by incorrect values.

1. To compact a Genbox database, on the **File** menu, click **Repair/Compact**. The [Open File Dialog](#) will appear. Enter the name of the database file you want to compact. The default filename will be the current Genbox database.
2. Click **Open**. The [Repair/Compact Dialog](#) will open.
3. Click **Compact**. A message will appear when the operation is completed. The reduction in size will be reported.

Checking the Links

Genbox databases are **relational**. A relational database contains multiple tables of data records. Data records can link to records in the same table or other tables. When Genbox is terminated abnormally, sometimes the links become corrupted. If you suspect the links between data records may need repair, you should check the links:

1. To check the data record links, on the **File** menu, click **Check Links**.
2. If any problems are detected, you will be prompted whether they should be corrected.
3. To see a list of the problems that will be corrected, click the "View Details" button.

Refreshing your Data

After changes have been made to a Genbox database by external programs, or when the program was abnormally terminated, you may need to **refresh your data**.

1. To refresh data, on the **File** menu, click **Refresh Data**.

This operation will look through the tables for internal consistency and make corrections where needed.

Spotting Data Problems

When entering data, even the best researchers occasionally make mistakes--enter the wrong year for a date, choose the wrong event type for an event, or even link children to the wrong parents. Sometimes it isn't a data entry problem, it's a transcription problem: information found in a source document was copied down incorrectly to begin with. Mistakes can also be present in GEDCOM files that are imported into your database. While some mistakes would be hard to identify, such as a misspelled name or an incorrect place, there are some problems that can be detected when considering the consistency of the database.

Genbox can identify some types of data consistency problems, primarily related to dates.

1. To check for data consistency problems, On the **Tools** menu, click **Problems Spotter**. The [Problems Spotter Tool](#) will open.
2. Enter your settings for limits, or use the defaults.

3. Click **Generate List**. When the operation completes, the [List View](#) will open to display the results as the **Potential Problems** list.

The list will show a row for the ID and name of each individual with a data consistency problem, followed by a row that describes the nature of the problem. You can double-click on each name to jump to their data record, where you can investigate the problem. If you determine it is a data entry error, you can make the correction, then proceed to the next individual on the list.

Finding and Merging Duplicate Individual Records

When you import data from a GEDCOM file, new individual records are automatically created for each individual in the file. This can lead to duplicate individual records--two records in the Individuals Table that represent the same real person, each with their own set of subrecords for names and events. Because the links between children and parents and the links between spouses reference the individual records by ID, it is important to **merge** the duplicate individual records into one record, and fix all the references to use a single ID. Otherwise, charts and reports won't display correctly, and data entry will be frustrating when there are two places for the same data.

Finding duplicate individuals can be complicated. In the typical case, one of the records will be entered by you, using your own source documents. The other record will originate from an imported GEDCOM file, and contain data that came from different source documents. This means the names could be spelled slightly differently, the birth and death dates could be off by a few days or years, particularly if they were estimates, and some data may be present in one record but not the other. Also, identifying candidates can be tedious when there are thousands of individual records.

Genbox can help you find potential duplicate individuals, with the **Match Finder Tool**. Pairs (or larger groups) of individual records that potentially represent the same person can be detected, according to your match criteria.

1. To find potential duplicate individuals, On the **Tools** menu, click **Match Finder**. The [Match Finder Tool](#) will open.
2. Enter your settings for match conditions, or use the defaults.
3. Click **Generate List**. When the operation completes, the [List View](#) will open to display the results as the **Possible Duplicates** list.

You can then compare the individual records in each group on this list, and make your own determination as to which are the same individual, and then merge their records together.

Merging Individual Records

Once you have determined that two (or more) records are duplicates, you can merge them together. This will result in only one record for the individual in the Individuals Table. All link references to the removed record will be redirected to the kept record.

To merge two individual records:

1. Move to the target individual on the Individuals View (the one you want to **keep**).
2. On the **Data** menu, click **Merge Individuals...**
3. The [Individuals Pick Dialog](#) will open to allow you to select the individual record you want to **merge** with the current one.
4. You will be prompted to confirm the operation, then the source individual's data will be merged into the target individual's data. The Source individual will then be deleted.

View Windows

The **View Windows** provide much of the interface in Genbox. They are used to display and modify data, search for data, and select options for charts, reports, export, and import. You can have multiple view windows open at once. The view windows are selected from the [View Menu](#).

View windows that display data records have a **header section**, which contains an **ID** box, a **Name** box, and a **Filter** button. The header section indicates the current record and filter conditions, and is used to select the record to view.

All view windows have multiple **pages**. Only one page can be viewed at a time. Select a page by clicking on its **tab**.

Some view windows have a row of **buttons**. These provide access to special functions.


ID


Every record has a unique **identification number, or ID**, that is used to reference it. The ID values are assigned by the program when records are created. The **ID** box in the header section displays the identification number for the current data record. If you know the ID value of a record, you can select the record by typing the ID into the **ID** box and pressing ENTER. Sometimes it is easier to select a record by its ID than by its name, especially when the name is long or similar to several other names in the current data table.


Name

The **Name** box in the header section displays the name for the current data record. To select a different record, type the name into the **Name** box. You can type just part of the name if you prefer. When there are several records with names that match the partial name you typed, a **Pick Dialog** will appear, displaying data on each of the matching records. You can select the record you intended from the list.

Filter Button

The **Filter** button  at the right side of the header section can be used to filter the records displayed on the view. Normally, the **record movement buttons** on the main toolbar will move to the first, previous, next, and last records in the current data table. When filtering is active, they are limited to only those records that match the current filter conditions: the **First Record** button will take you to the first matching record, and the **Next Record** button will take you to the next matching record, skipping over all records that don't match the current filter conditions.

1. **To filter records**, press the **Filter** button . A **Pick Dialog** will open.
2. Enter the filter conditions you want. For the [Individuals Pick Dialog](#), this can be name pattern, range for birth date or death date, sex, number of children, number of spouses, number of families, and individual flags.
3. Click the **Set Filter** button. The Pick Dialog will close, and the first matching record will be the current record.

The **Filter** button will have a pressed appearance  whenever a filter is active. This is to remind you that the record movement buttons are only stepping through a subset of the total records.

- **To turn off filtering**, press the **Filter** button . A **Pick Dialog** will open.
- Click the **Clear Filter** button. The Pick Dialog will close, and the **Filter** button will resume its normal appearance.

Individuals View

The **Individuals View** is the main data view in Genbox. It presents all the information stored for an individual in one view, with the data organized onto multiple pages, each with its own tab. Each person in your database will have a record in the Individuals Table.

[Summary Page](#)

[Pedigree Page](#)

[Identifiers Page](#)

[Attributes Page](#)

[Parents Page](#)

[Family Page](#)

[Events Page](#)

[Contact Page](#)

[Notes Page](#)

Individuals View: Summary Page

The **Summary page** presents an overview of the data stored for an individual: birth name, sex, parents, spouses, children, events, and media. Complete data for the individual can be found on the other pages of the [Individuals View](#).

Smythe.GDB: Individuals (27 Records)

1 Reginald Edward SMYTHE (1780 - 1826)

Summary Pedigree Identifiers Attributes Parents Family Events Contact Notes

Name: Reginald Edward SMYTHE (1780 - 1826) Male

Father: Sir Charles SMYTHE

Mother: Jane EDWARDS

Family1: Elizabeth CONYER (1786 -)

Children

Children	Sex	Birth
+ Rebecca MOORE (1805 - 1875)	F	
+ John SMYTHE (1813 - 1891)	M	14 May 1813
Add child		

Event Date Place Subject/Detail Age MGRSW

Birth	3 Aug 1780	Little Chesterford, Essex, England		0	✓✓✓
Christening	20 Aug 1780	St Margaret's, Ickleton, Cambridgeshire...		5	✓✓✓
Education	between S...	Ridgeway's, Braintree, Essex, England		17	✓✓✓
Education	between S...	King's College, Cambridge, Cambridge...		20	✓✓✓
Graduation	12 Jul 1801	King's College, Cambridge, Cambridge...		22	✓✓✓
Marriage License	10 Jul 1803	Cambridge, Cambridgeshire, England	Elizabeth CONYER (1786 -)	22	✓✓✓
Marriage	15 Jul 1803	Burnt Pelham, Hertfordshire, England	Elizabeth CONYER (1786 -)	23	✓✓✓
Annulment	10 Aug 1803	Chancery Court, London, England	Elizabeth CONYER (1786 -)	25	✓✓✓
Military Service	10 Oct 1805	London, England		29	✓✓✓
Marriage Contract	1 May 1810	Malta	Rachel WOODS (1785 - 1818)	29	✓✓✓
Marriage Banns	20 May 18...	St. Stephen's, Malta	Rachel WOODS (1785 - 1818)	29	✓✓✓

Name Box

The **Name** box shows the (first defined) birth name of the current individual. An individual can have an unlimited number of names and numeric identifiers, which you can view and enter on the [Identifiers page](#). On the Summary page, only the first birth name is displayed, and entering a name in this box will automatically set its identifier type on the Identifiers page to "Birth name".

Complete information on names and other identifiers can be set on the [Identifiers page](#).

Sex Box

The **Sex** box shows the sex of the current individual:

Male
Female
Unknown
Other

A value can be selected from the drop-down list, or by typing "M", "F", "U", or "O". Complete information on attributes can be set on the [Attributes page](#).

When entering new individuals, it is a good idea to also enter their sex at the same time, if known. When the sex is known, pronouns (he/she, him/her) can be used on narrative reports, and role labels (husband, wife) can be used on family group reports.

Father and Mother Boxes

The **Father** and **Mother** boxes show the preferred parents for the individual. Complete information on parents can be set on the [Parents page](#). If these boxes are blank, you can enter the name of the father or mother here as well. You can double-click the name of the father or mother to jump to their individual record.

When both a father and mother are entered on the Summary page, a family record for the father and mother will be created automatically. A birth record for the current individual will also be created, linked to the parent family record.

Reversing Mother and Father

When father and mother are entered on this page, their genders (Male and Female) will be automatically initialized as well. But if a parent is added on the Events page, the initial gender may be set to unknown. Later, when observing the father/mother links here on the Summary Page, you may discover that the roles appear to be reversed: the mother is in the father's box, and the father is in the mother's box.

To correct this problem, double-click on the name of the father to make his record current. Change his sex to "M" (male). Then go to the record for his spouse (the mother). Change her sex to "F" (female). When this is done, the system will detect that a family record exists for the couple that appears to have the father/mother roles reversed. It will ask if the roles should be reversed, choose "Yes". Then when the parents appear on the Summary page, their father/mother roles will be correct.

Note: this role reversal check is only performed when the gender on a spouse is changed, and only if the change results in male/female genders opposite of father/mother roles. If you have an existing family with roles reversed but correct genders assigned, you will need to temporarily change the gender on one spouse to "unknown", then back to the correct gender, in order to initiate this correction.

Spouse Box

The **Spouse** box initially displays the name of the preferred spouse. Complete information on spouses can be set on the [Family page](#). All spouse names can be seen on the drop-down list. If there are additional spouses defined, the label on the box will change to indicate the spouse number: it will display "Spouse1" for the first spouse and "Spouse2" when showing the second spouse.

- To add the first spouse, type the name of the spouse in the box.
- To add an additional spouse, click the **add** option on the drop-down list, then type the name of the spouse into the box.

You can double-click the name of a spouse to jump to their individual record.

When a spouse is added on the Summary page, a Marriage event record will automatically be created for the current individual and spouse.

Children List

The **Children** list displays the name, sex, and birth date for each child that is linked to the current individual. You can type the information for new children into the next blank line. Children can also be added on the Family page or the Events page.

- **To add a child linked to the current individual and displayed spouse**, click where it says "Add child" in the auto-generated font style, then type the child's name. Press TAB then "M" or "F" to enter the child's gender. Press TAB again to enter the birth date for the child.

Children can also be added on the Family page or the Events page.

A **plus-sign** ("+") appears before the names of children that have children of their own entered into the database. You can double-click the name of a child to jump to their individual record. The list can be sorted by name or birth date by clicking on the column headers.

Notes

- If the current individual has multiple spouses, children of the currently displayed spouse will be shown in the normal data font, and children of the other spouses will be shown in the **second layer text** font.
- A specific child will be listed only once, even when it is linked to the current individual in multiple parent families.
- When a child is added to the **Children** list, it is automatically linked to the family of the current individual and the currently displayed spouse as the birth parents. If no spouse has been entered, a family record containing the primary individual only will be created, and the spouse box will display "(unknown spouse)".
- If you want to link a certain group of children to a different unknown spouse than another group of children, you will need to first create records for the unknown spouses. You can use names like "First Wife" and "Second Wife" to identify them. Otherwise, all children entered with an unknown spouse will be added to the same family of the primary individual.
- If you have several children with blank birth dates or with the same birth date, you can drag the rows up/down to specify birth ordering.

Events List

The **Events list** displays the event type, date, place, subject individual, age at time of event, a number of flags, and an Excluded checkbox for each event record stored for the individual. Complete information on each event can be viewed and entered on the [Events page](#). Basic information on events can be entered on this page as well.

Event Type Column

The **event type column** displays the type of event. It is also used to create new event records.

- **To enter a new event**, click where it says "Add event" in the auto-generated font style.
- Select the event type from the drop-down list that appears.
- Press TAB or use the mouse to move to the **Date** box and then the **Place** box.

You can double-click the event type to jump to the events record on the Events page.

Date Column

The **date column** is used to display/enter the event date.

Place Column

The **place column** is used to display/enter the event place.

If the value in the subject column is blank, a long place name in the place column will be allowed to overflow into the subject column. This provides for the best use of limited screen space. Note: overflow is disabled when the grid option is active.

You can double-click the Place text to jump to the place record on the [Places View](#).

Subject/Detail Column

The **subject individual / detail column** is used to display the "subject" individual of the event, if different than the current focus individual, or the detail text of the event. The subject individual is one of the principal individuals of the event (primary, spouse, other). The displayed subject individual depends on the event type and the current focus individual:

- For a **parents link** event type, the subject is the **child**. For example: a "childbirth" event in the list would show the name of the child born in this column.
- For a **spouse link** event type, the subject individual is the other **spouse**. For example: a "marriage" event would show the name of the person married.
- For an **associated individual** event type, the subject is the **other individual**.
- For a **witnessed event**, the subject is the **child** or **primary individual** of the witnessed event, depending on the event type of the witnessed event.

- For all other event types, the subject is the same the current individual, and this column will display the **detail text** of the event instead.

You can change the focus to the subject individual by double-clicking the name shown in this column. If this is a witnessed event, the shown event record will also change; otherwise, the same event record will be shown.

If the event record has no subject individual, then the "detail" text from the event record will be shown, if any. This includes attribute values, such as cause of death, occupation, and religious affiliation.

Age Column

The **Age column** shows the age of the individual at the time of the event, in years. If shown in the **auto-generated text font style**, the age has been generated automatically, based on the difference between the event date and the birth date. If shown in the normal text style, this is a value that has been manually entered, overriding the automatically-generated value.

Flags Column

The column labeled "**MGRSW**" has space for five checkmarks for each event. The checkmarks represent the presence of additional data for media (M), general notes (G), research notes (R), source citations (S), and witnesses (W). This additional data can be viewed on the Events Page. You can double-click on the flags to jump to the corresponding event record. The flags column is read-only.

Excluded Column

The **Exclude column** has a checkbox for each event. Checking this box marks the event as "Excluded". Excluded events do not appear on any output (charts, reports, GEDCOM files, web pages).

Basic Events

If enabled on the Preferences Operation Page, event types marked "basic" will appear automatically for all individuals on the Event List. This makes it easy to add basic information for new individuals; you can immediately type the date/place information into the appropriate boxes. The event label on automatically added basic event types will appear in the **auto-generated text font style**.

Source Citation Button

You can enter a source citation that applies to the entire individual by clicking the **Source Citation** button on this page. Normally, you would enter source citations for specific data items. The button on this page may be useful when the current individual's data all came from a single source. For help, see the chapter [Citing your Sources](#).

Research Target Button

You can make the current individual a target for further research by clicking on the **Research Target** button. This will open the [Research Targets View](#). When the current individual has been linked to a Research Targets record, the **Research Target** button will be shown in bold.

Media Control

The **Media** control is the open area to the right of the middle boxes. It initially displays the principal media linked to the individual, if any. Any number of multimedia objects can be linked to each individual. Multimedia can also be linked to families on the [Family page](#) and to events on the [Events page](#). Multimedia linked on the **Summary** page should be more closely related to the current individual than to a family unit or to a particular event. A good example is an individual portrait. See the chapter [Adding Multimedia](#) for help on the **Media** control.

Splitter Bars

There are two **splitter bars** that allow you to adjust the sizes of the areas on this page. There is vertical splitter to the left of the **Media** control. You can use this splitter to reduce the area for the **Media** control if you need more space to display father, mother, spouse, and children information. There is a horizontal splitter between the **Children** list and the **Events** list. You can use this to increase the display area for either children or events.

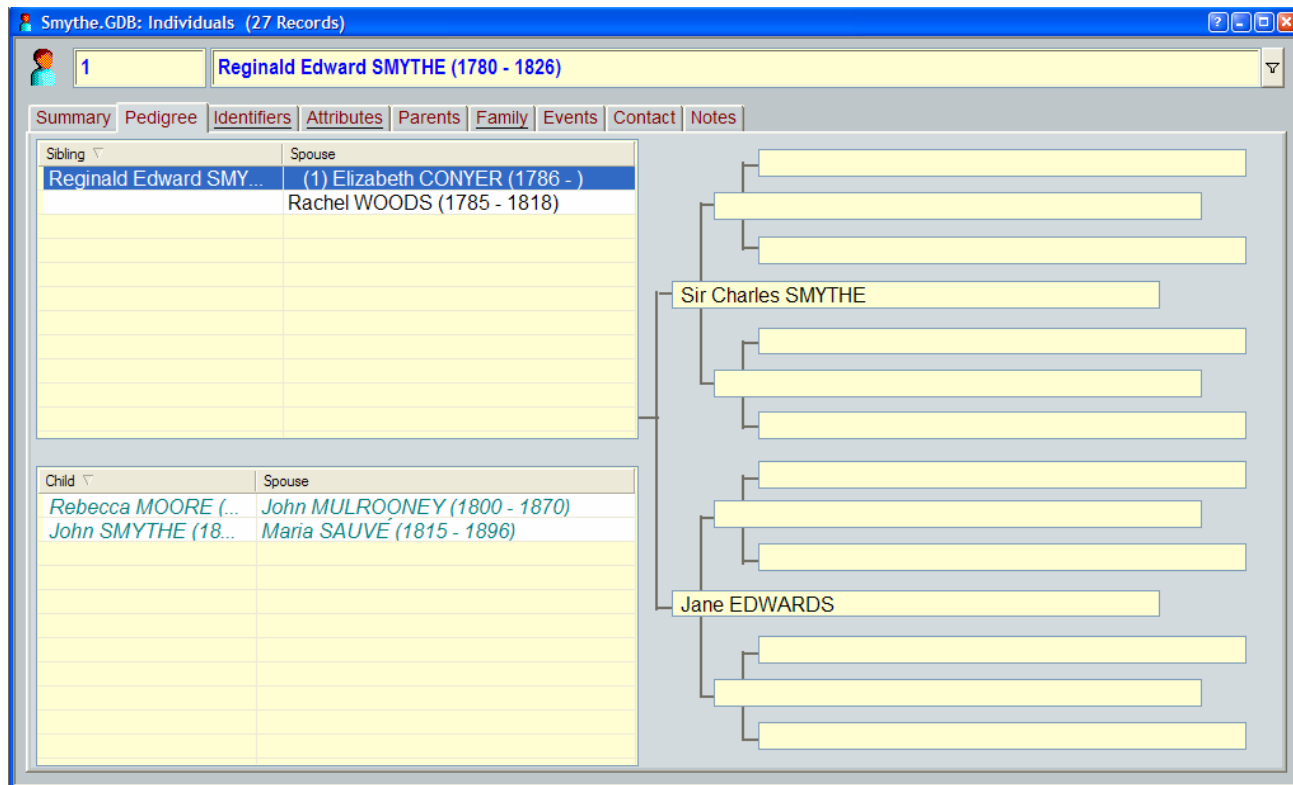
1. To move a splitter bar, position the mouse so that the cursor changes into the double-arrow shape.
2. Drag the bar to the desired position by pressing and holding the left mouse button while you move the mouse.

You can also resize the view to allow more information to be seen, by dragging the view edges to the new size. When a view is resized, the splitter bars will return to their default relative positions. You can resize a view slightly if you wish to reset the splitter bars.

Individuals View: Pedigree Page

The **Pedigree** page provides information on three generations of ancestors, siblings and their spouses, and children and their spouses of the current individual. This page can be helpful in understanding how the current individual fits into the family tree. It can also be used for navigation: you can jump to the individual record of any name displayed with a double click. Unlike the other pages on the Individuals View, the Pedigree page is not used to enter data.

The **Pedigree** page contains the names of many of the relatives of the current individual. The preferred father, mother, spouse, and children can also be viewed, as well as edited, on the [Summary page](#).



Siblings List

The **Siblings List** contains one row for each child and spouse of the current parent family, including the current individual and his/her spouses. The **highlighted** row indicates the current individual and spouse. When a sibling has more than one spouse, additional rows with each spouse name are shown. The Children List always displays the children and their spouses for the currently selecting sibling on the Sibling List.

There are two columns: Sibling and Spouse.

- To display the children of a different sibling or different spouse of the current individual, single-click on the row. If this is a different sibling, this action will make the sibling the new current individual.
- To jump to the individual record for a spouse, double-click on the spouse name.

Sibling Column

The name of each sibling, including the current individual, appears once in the **Sibling** column. If a sibling has multiple spouses, additional lines will appear below the first, with a blank in the Sibling column. Siblings are shown in birth order. You can sort them in reverse order by clicking on the column header.

Spouse Column

The name of each sibling's spouse appears in the **Spouse** column. If a sibling has multiple spouses, the spouses will be shown in marriage order, with the order number in parentheses ("(1)", "(2)", etc.) preceding

the name. If a sibling and spouse have children, a plus sign (+) will be shown. To jump to the individual record for a spouse, double-click on the spouse name.

Children List

The **Children List** displays the children for the current sibling on the Sibling List. One row appears for each child and spouse. When a child has multiple spouses, additional rows with each spouse name are shown.

The children of the current sibling and spouse are shown in the normal List font. Children of the current sibling and **other** spouses are also shown, but in the Second Layer Text font, which is typically in *italics*.

Child Column

The name of each child of the current individual appears once in the **Child** column. If a child has multiple spouses, additional lines will appear below the first, with a blank in the Child column. Children are shown in birth order. You can sort them in reverse order by clicking on the column header.

Spouse Column

The name of each child's spouse appears in the **Spouse** column. If a child has multiple spouses, the spouses will be shown in marriage order, with the order number in parentheses ("(1)", "(2)", etc.) preceding the name. If a child and spouse have children, a plus sign (+) will be shown. To jump to the individual record for a child or spouse, double-click on the name.

Pedigree Boxes

Three generations of ancestors for the current individual are shown in the **Pedigree boxes**. The two parent boxes are linked directly to the Siblings box, indicating that they are the parents of all the siblings shown. There are four grandparent boxes linked to the parent boxes, and eight great-grandparent boxes linked to the four grandparent boxes.

To jump to the individual record for any displayed ancestor, double-click on the name.

Ancestor Continuation Buttons

If more than three generations of ancestors of the current individual are stored in the database for a particular ancestral line, an **Ancestor Continuation button** for that line will appear. It shows a plus-sign (+) to indicate that more generations are available for viewing.

- To move back one generation, click the Ancestor Continuation button for the desired ancestral line. The parents of the selected third-generation ancestor will now be visible.

This action causes one of the parents of the previous current individual to become the new current individual. This means the contents of the Pedigree boxes will change. To help you find where you were before clicking the button, the previous third-generation ancestor in the line of the selected Ancestor Continuation button will now be highlighted.

Alternate Parents Button

If the current individual has multiple parent families, the **Alternate Parents** button will appear between the two parent boxes. It will display the current parent family number and the total number of parent families, as in "1 of 2". To view the alternate parents and their ancestors, click the button. Each click will cycle through the next set of parents.

Individuals View: Identifiers Page

Genbox supports an unlimited number of **identifiers** for each individual. An identifier is most often a name, but it can also be a number or a combination of letters and numbers, such as a social security number or other national ID. An individual can be known by many different names over the course of a lifetime: birth names, nicknames, married names, legal name changes, aliases, nobility titles, professional titles, and military ranks. A name can also appear with different spellings or in different forms on source documents. It is important to record names exactly as you find them, because what you might assume is a name variation may actually be a reference to a different individual, and the original spelling could be useful later to resolve this research problem.

The **Identifiers** page contains complete information on all individual identifiers. One name can be marked **primary**. The primary name is also viewable and editable on the [Summary page](#).

Identifier Type	Name or Number	#
birth name	Reginald Edward /Smythe/	1
prefix title	Captain	2
nickname	Reggie	3
suffix title	Retired	4
user ID	1	5
RFN	1234	6

Add identifier

For Selected Identifier:

Defining event:

General Notes:

Research Notes:

Identifier List

The Identifier List contains one row for each identifier. There are eight columns: Identifier Type, Name / Number, Primary, Preferred, Source Citation, Event Link, Exclude and Identifier ID. The **highlighted** row indicates the selected identifier. For the selected identifier, related data is shown in the group box below the list.

- **To Add a new identifier for the current individual**, click where it says "Add identifier" in the auto-generated text font style, then type the new name. The type will default to "Other name"; you can change it to any of the defined identifier types.
- To see the related data for an identifier, click on its row in the list box to select it.
- To delete the selected identifier, press the DELETE key or go to the **Data** menu and click **Delete Selected Name**.

Identifier Type Column

Each identifier for an individual has an **Identifier Type**. The type can be changed by selecting from the drop-down list. The names of the identifier types and their properties are set on the [Data Setup View: Identifier Types](#) page. The default non-hidden identifier types are:

birth name
nickname
prefix title
married name
name change
name variant
alias
suffix title
other name
AFN
RFN
SSN
National ID
user ID

Birth Name

A **birth name** is the full name given to an individual at or shortly after birth. It normally consists of two or more parts: the **given name(s)** and the **surname (family name)**. Usually an individual will have only one birth name. Additional birth names can be entered when there is some doubt over the correct name, or when there are birth names for additional languages. The notes box can be used to describe the specific situation.

Nickname

A **nickname**, or "pet name", is a personal name an individual is called in place of the birth given names during some part of their life. A nickname is often a diminutive form of a given name, as in "Jim" or "Jimmy" for "James".

Nicknames are important to know and track because often the source documents we find will use the nicknames instead of the proper names. They also add a personal touch to reports, as nicknames may be the most personal thing we know about individuals.

You can enter nicknames as part of the name by placing them within double quotes. The system will recognize this, and remove the nickname portion to its own name record. For example:

James "Jimmy" Smythe

If this name were entered for a new individual, the birth name would be recorded as "James Smythe", and a separate nickname would be entered as "Jimmy". Both names would be marked "preferred" by default, resulting in a display of both names in the same format as shown above.

A nickname record can also be used to indicate that the individual commonly used a middle name, or a combination of the first name and middle name, in informal use. You could enter a nickname record for "Mary Beth", to indicate that Mary Beth Simpson used both names together as her common name. If "Tobias Russell Jones" was commonly known as "Russell Jones", you would indicate this by adding a second name record for the nickname "Russell".

Note A nickname is considered a replacement for the given names of an individual. No surname should be included in the nickname. When searching for individual names elsewhere in the system, Genbox will recognize entry of a nickname and any surname assigned to the individual.

Prefix Title

A **prefix title** is a name part that appears before the given names, such as "Dr." or "Rev.". It could be an honorific title, nobility title, clerical title, or military title. It is a name part that is not part of the legal name of the individual.

It is best to store the prefix part separate from the given names, so that a search on a given name won't be affected.

Married Name

The **married name** type identifies a name assigned to an individual on the event of their marriage.

Name Change

The **name change** type identifies a name that replaces the birth name (or previous name change name) in chronological use. This name type is mainly used for individuals who undergo a **legal name change** for reasons other than marriage.

Source Name Variation

A **source name variation**, or **name variant**, is a name that is entered exactly as it is spelled in one or more sources. This type can be selected when using "Source Lock Mode" during data entry, or when entering source citations. It is important to keep track of name variations, because you may discover later that two sources with slightly different spellings that you thought were the same person are in fact referring to different individuals. Without a record of the variation, it would be harder to resolve this type of problem. It is also misleading in source citations to attribute a "normalized" spelling to a name in a source when in fact a different spelling appears.

Source name variations can include:

- spelling variations
- translations
- transliterations
- name part order variations
- shortened forms

By storing the source name variations, Genbox can also make use of them when formatting the source citation text.

See the chapter [Citing your Sources](#) for more information.

Alias

An **alias** is an unofficial name used by an individual. This name is in addition to the birth name. Several aliases may be in use during the same period.

You can enter aliases when entering new individual names by prefacing them with ", alias " or ", aka ". The system will recognize this, and remove the alias name to its own name record. When included in the preferred name, the name will be prefaced with ", alias ".

Suffix Title

A **suffix title** is a name part that appears after the surname, such as "Jr.", "Duke of Windsor", or "fisherman at Broad Cove". It serves to further qualify the name, to distinguish it from potentially other individuals with the same given and surname. Some titles of royalty (**nobility titles**) are also stored with this name type.

You may wish to create your own suffix titles to distinguish people in your database that otherwise would have the same name, as in "John Smith, from family Bible" and "John Smith, in George's Will".

On data entry of names on the Summary page and elsewhere, portions of a name that appear after a comma will automatically be extracted and stored as separate **suffix title** names. They will also be marked as "preferred", so they will be included as part of the preferred name wherever the individual is referenced.

Other Name

The **other name** type is for any name that does not fit into one of the other name type descriptions. An **other** name can be just a given name, a surname, or both.

Possible uses for the **other** name type include:

- alternate name when you are not sure which is correct
- translation / other language
- pronunciation guide
- invented names for your own use in identifying individuals
- names of unknown type

Note When you have a source record that documents the name, you should choose the **source name variation** name type instead of the **other** name type.

You can enter **other** names when entering new individual names by placing them inside parentheses. The system will recognize this, and remove the **other** name to its own name record.

When an **other** name is marked for inclusion in the "preferred" name, it will be formatted to appear inside parentheses. Likewise, on data entry, portions of names that are placed within parentheses will automatically be extracted and stored as separate **other name** entries. They will be marked as "preferred", so they will be included as part of the preferred name wherever the individual is referenced.

AFN

AFN stands for **Ancestral File Number**. These 10-digit identifiers are assigned by the Family History Department.

RFN

RFN stands for **Permanent Record File Number**.

SSN

SSN stands for **Social Security Number**.

National ID

The **National ID** identifier type is for any national identifier, other than a social security number.

User ID

The **User ID** identifier type is for your own use. It can be a number or text. Genbox formats User IDs with angle brackets, so a User ID of **MYID347** would appear on the display and reports as **[MYID347]**. This helps to distinguish them from data that originated from a source record.

User IDs are useful when there are individuals in the database for which you have no other names. For example: suppose you know that June Schaefer and Jane Schaefer are sisters, but you do not know anything about their parents. In order to store the sister relationship, you will need to create an individual record for at least one of their parents, then add the two daughters as children of the parent. For this parent, you can assign a User ID such as **[Father of June and Jane Schaefer]**. This User ID makes it clear who the individual is, and the square brackets make it clear that this is a User ID that has been assigned; it is not data that originated from a source record.

_UID

UID stands for **Unique Identifier**. This identifier is used by Personal Ancestral File. Genbox will recognize these values on input and store them, so that they can be exported later.

Name / Number Column

The **Name / Number** column contains the actual text of the identifier. Given names and surnames are stored in Genbox as one data value. Click on a name to edit it. Use normal capitalization and name part order.

Slash Marks in Names

Genbox uses **slash marks** to mark divisions between name parts. Usually, two slash marks are used to mark the beginning and ending of the **surname** part, as in "John /Smythe/". Slashes are useful in identifying the surname portion when the surname is not a single word, as in "John /Du Pont/". They are also helpful when the surname is not the last word in the name. When you type a name and press ENTER or TAB, Genbox will automatically add slash marks around the last word in the name if slash marks are not already present. On charts and reports, the slashes are usually not shown. Also, slashes are not used on the numeric identifiers.

You can also use a **third slash** to divide the surname into two parts: the **surname prefix**, and the **surname base**. A surname prefix is a leading portion of a surname that should not be used when sorting. In the name "George /van /Stone/", the word "van" is identified as the surname prefix. A surname sort would put this name under "S", not "v".

Surname prefixes do not need to be separate from the surname. In the name "Carl /d'/Hondt/", the surname prefix is marked as "d'", and there is no separating space from the surname base "Hondt".

Tip If you want to include a forward slash as part of the name itself, precede it with a backslash: "Gloria /Myers\Smith/". This will appear as "Gloria Myers/Smith" on reports.

Primary Column

The **Primary** column is labeled with a circled "1". One identifier can be marked "primary". This is usually the birth name of the individual. The identifier type marked "primary" can be individually selected on charts and groups. It can also be viewed and edited on the Summary page.

Preferred Column

The **Preferred** column is labeled with a star. This column contains check marks next to those identifiers that are **preferred**. Genbox builds a composite name for an individual based on the names that are marked. This composite name, or **preferred name**, is used when a reference is made to an individual from elsewhere in the program. Typically, the birth name is the foundation of the preferred name. You can include suffixes or nicknames to further distinguish the name. This is particularly important when multiple individuals in your database have the same or similar birth names, a common occurrence in family trees.

When you click on the **Preferred** column for an identifier, you will immediately see a change in the preferred name shown in the **Name Key** box in the header section of the view.

Source Citation Column

The **Source Citation** column contains "open book" buttons which indicate which identifiers have source citations, and the surety level for the data. Click one of these buttons to enter source citation information on the [Citations View](#). For help, see the chapter [Citing your Sources](#).

Event Link Column

The **Event Link** column shows which identifiers have defining events. A defining event is the event at which the identifier was assigned to or first used by the individual. The "calendar" icon will be yellow when an event link exists. The icon will be gray when no defining event has been entered. When there is a defining event, a double-click will take you to the event record on the [Events page](#).

Exclude Column

The **Exclude** column is labeled with a circled slash mark. It shows which identifiers should be **excluded** on charts, reports, and exported data. This feature allows convenience names to be entered to help distinguish individuals without affecting the appearance of names on reports. To do this, set the name type to "Suffix Title" and check the "Preferred" and "Exclude" flags; your extra identifier will be appended to the individual's name inside the program but not on reports. The exclude flag can also be used to protect sensitive data from appearing on the output, such as for Social Security numbers.

Identifier ID column

The **identifier ID** column displays the record ID for each identifier. This column is read-only.

Defining Event

Each name and identifier can be linked to a defining event. Linking a name to an event serves to define when the name first came into use. If there is a link to a defining event, Genbox will be able to use this name on narrative reports with the event template code [N]. You can select an event from the drop-down list.

General Notes

Use the **General Notes** box to enter notes regarding the selected identifier. You could describe the circumstances under which the name was given, for example. General notes can be included in the body or footnotes on a report.

Research Notes and Target

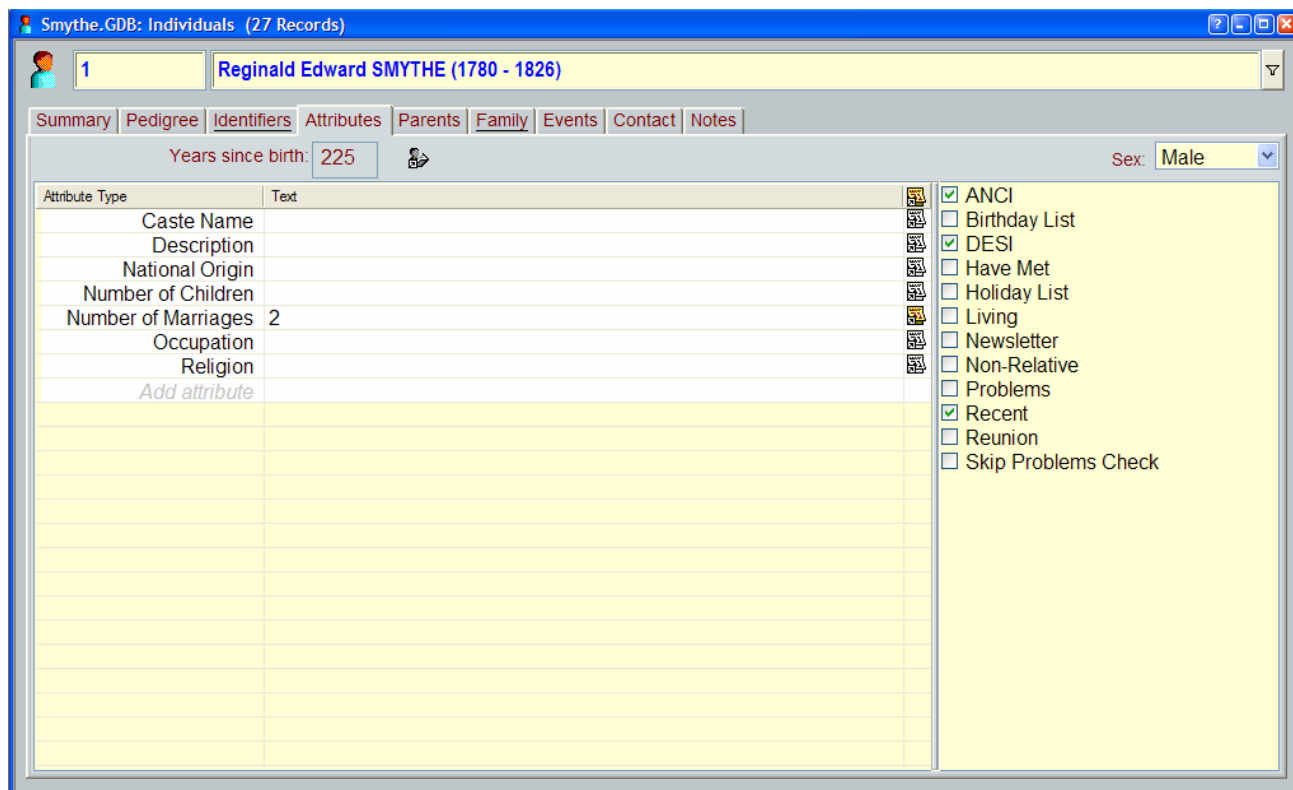
Use the **Research Notes** box to record your research efforts regarding the selected identifier. You can also make the name a target for further research by clicking on the **Research Target** button. This will open the [Research Targets View](#). When the current identifier has been linked to a Research Targets record, the **Research Target** button will be shown in bold.

Splitter Bar

There is a horizontal **splitter bar** below the **Identifier** list. Drag it down to increase the number of list rows visible, or drag it up to see more of the notes text. There is a vertical **splitter bar** between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

Individuals View: Attributes Page

The **Attributes page** contains complete information on individual attributes. An **attribute** is a characteristic of a person that can persist over an extended period of time, such as sex, physical description, national origin, and occupation.



User-definable attributes in Genbox are divided into two groups:

- **Text attributes** have a type and a text value. Text attributes are linked to a defining event.
- **Flag attributes** are named check boxes. A check indicates the individual "has" the attribute identified by the flag name.

When the **Attributes** page is selected, you will see the **Text attributes** list on the left, with one row for each text attribute type. The **Flag attributes** list is on the right, with one check box for each defined individual flag.

Years Since Birth Box

The **Years since birth** box displays the number of years since the individual was born. This is a read-only value automatically generated by Genbox, based on the earliest birth date stored for the individual.

The label on this field indicates the "living" status for the current individual: if the system algorithm for determination of living status indicates this individual is still living, the label on this box will change to **Age**.

Living Determination

An individual is determined to be living under any of the following circumstances:

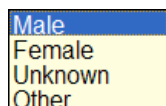
- The birth date determines an age less than the preferences setting for "Living Individuals Age" and there is no death event recorded, OR
- There is no birth date and no death event recorded, OR
- the "Living" flag has been checked

The "Living" attribute flag functions as an "override". When the user sets this flag, the individual is treated as if they are still living, regardless of data values for birth and death. This override function can be useful when you wish to maintain the privacy of individuals who died recently on your reports and GEDCOM exports.

Sex Box

The **Sex** box shows the sex of the current individual. For the purposes of genealogy, the physical (biological) sex of the individual at birth is normally most relevant and is stored in the **Sex** box. If the individual has a gender identity or sexual preference that differs from their biological sex, you may wish to enter this information in the general notes field or in a text attribute.

Possible choices for the **Sex** box are:



- **Male** - the individual was biologically male at birth.
- **Female** - the individual was biologically female at birth.
- **Unknown** - the sex of the individual is unknown.
- **Other** - the individual has biological characteristics of both male and female and a determination of sex could not be made at birth. These individuals are sometimes described as "intersexed" or "hermaphrodite". This choice can also be selected to prevent the use of male/female pronouns.

A value can be selected from the drop-down list, or by typing "M", "F", "U", or "O".

Tip When entering new individuals, it is a good idea to also enter their sex at the same time, if known. When the sex is known to be male or female, pronouns (he/she, him/her) can be used on narrative reports, and role labels (husband, wife) can be used on family group reports. If there is any doubt, click "Unknown".

Sex can also be viewed and set on the [Summary page](#).

Text Attributes Box

The **Text Attributes** box contains at least one row for each defined attribute type. All defined text attribute types will appear for all individuals on the Attributes page, regardless of whether a value for the attribute has been entered. The list box has three columns: Attribute Type, Text, and Event Link. An individual can have more than one value for a particular attribute type, with each value on a separate row and linked to a different event record.

- **To enter text for one of the shown attribute types**, type the text value in the blank space to the right of the attribute type label.
- **To add another text attribute for the current individual**, click where it says "Add attribute" and choose the type from the dropdown list, then type the new text.
- You can define new attribute types on the [Event Types View](#).

Attribute Type Column

The **Attribute Type** column displays the name of each attribute, as defined by the Event Type records which have a "Secondary" value of "Attribute".

1. To define a new attribute type, open the [Event Types View](#).
2. Create a new event type record.
3. In the **Secondary** box, click on "Attribute" from the drop-down list.
4. In the **Secondary Label** box, type the name for the attribute type.

Note The **Attribute Type** column on the Attributes page is read-only.

Text Column

The **Text** column contains the actual attribute text values for the current individual. If the text value on a row is blank, it means the individual has no value entered for the attribute type listed on that row.

Event Link Column

The **Event Link** column for text attributes link to the **defining events**. The "calendar" in this column will be gray when no text has been entered, and yellow after attribute text has been entered. Click the icon to jump to the corresponding event record on the [Events page](#).

Every attribute has an associated defining event record so that there is a way to format the information for narrative reports. Attributes by themselves don't have default sentence templates or a way to order their output (no date fields). Because they are linked to event records, you can customize how the information will appear on reports. The event record does not have to describe the "defining" event for the attribute. It can be used to describe the attribute in general terms. It doesn't have to show a date or suggest the attribute was acquired at a specific point in time. You can also set the "Exclude" flag on the event record if you don't want it to appear at all on reports.

Flag Attributes Box

The **Flag Attributes** box contains one check box for each defined individual flag. If checked, an individual "has" the attribute indicated by the name of the check box. The individual flags are defined on the [Data Setup View](#). All defined individual flags will appear for all individuals on the Attributes page. This makes it easy to see what flag attributes an individual does and does not have, and changes can be made with a single click.

Splitter Bar

There is a vertical **splitter bar** between the **Text Attributes** list and the **Flag Attributes** list. Drag this splitter to the right to increase space for text attribute names, or to the left to increase space for viewing the flag check boxes.

Individuals View: Parents Page

The essence of a genealogy is the links between its individuals. There are two kinds of genealogical links: from child to parent, and from individual to spouse. Genbox supports the entry of multiple sets of parents for an individual. When your research suggests more than one possibility for biological parents, you should enter a parents record for each conflicting pair, and create source citations for each.

Parent records are not just for biological parents. Adoptive parents, foster parents, and even godparents can be entered. Genbox also supports "direct ancestor" as a parent type, which is useful when your research has shown a connection but the intermediate generations are not known.

The **Parents page** contains complete information on parent links. The Parents page shows detail for one parents record at a time.

Smythe.GDB: Individuals (27 Records)

1 Reginald Edward SMYTHE (1780 - 1826)

Summary Pedigree Identifiers Attributes Parents Family Events Contact Notes

Parents: Sir Charles SMYTHE and Jane EDWARDS

☒ Preferred parent family ☐ Multiple birth

☐ Alternate parents link ☐ Disproved

☐ Exclude link from reports

Role: Name: Relation: ☐ private

Father Sir Charles SMYTHE Biological parent

Mother Jane EDWARDS Biological parent

General Notes for Parents Link: Research Notes:

Parents Selector Box

The **Parents Selector** box appears at the top of the page, and displays the names of both parents joined by "and". It identifies the **current** parents record.

- To select a different parents record to view or edit, click this box and select from drop-down list.
- To add an additional parents record, click this box and then click **add** from the drop-down list.

You can also select parent records and add new records using the subrecord controls.

Check Boxes

A number of check boxes can be checked for each parent record:

Preferred parent family

The **Preferred parent family** is the parent record that will be used elsewhere in the program when a single set of parents is required, such as on the [Summary page](#) and on charts when the Child-Parent Links to Show value is set to "preferred". Only one parent record can be marked preferred for each individual. When this

check box is checked, it will automatically be cleared for other parent records for the current individual. If no parent record is marked as preferred, the first parent record will be used as the preferred parent record.

Alternate parents link

Checking the **Alternate parents link** check box indicates that the current parent record is considered an **alternate**, rather than an **additional**, parent record. An alternate parents record would be treated on narrative reports as a research possibility, but secondary to the preferred parents link.

Note Parent records of non-biological types, such as adoptive parents, should not be marked as alternates.

Exclude link from reports

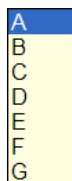
Checking the **Exclude link from reports** check box will cause the current parents link to be ignored when producing charts and reports. This can be used in two ways: to hide data that is considered inferior or incomplete, or to purposely introduce breaks in a genealogy to effectively "prune" a genealogical tree.

Disproved

The **Disproved** check box provides a way to indicate that a certain individual is known NOT to be a child of the indicated parents. This parents record will not be used in the creation of charts or for determining ancestry or descendants on reports. The information about the disproved relationship can appear on narrative reports as part of the discussion.

Multiple birth

Individuals who were born as part of a multiple birth (twins, triplets, etc.) can be indicated by checking the **Multiple birth** check box. When checked, the **Multiple Birth Group** box will be enabled, allowing you to choose a group identifier:



- To indicate the members of a multiple-birth group, use the **Multiple Birth Group** box to assign the **same** group identifier to each member of the group.

For example: suppose a family has twins, triplets, and two other children. The twins would each be marked as a multiple birth, with a group identifier of "A". The triplets would each be marked as a multiple birth, with a different group identifier, such as "B". The remaining children would not be marked as multiple births.

You will need to go to the individual record for each group member in turn to set their group identifier on their respective parent records. The actual choice of group letter used for a group (A, B, etc.) is not important; it just needs to be different from that used by other groups involving the same individuals.

When multiple births have been properly grouped, Genbox can produce better birth descriptions on narrative reports.

Relation: private

Check the **Relation: private** check box when the actual relations, as stored in the **Relation** boxes, should be ignored on charts and reports, treating the relations as biological instead.

Role Boxes

The **Father Role** box has the choices "Father", "Parent1", and "Other":

Father
Parent1
Other

The **Mother Role** box has the choices "Mother", "Parent2" and "Other":

Mother
Parent2
Other

The role choices provide a way to indicate nontraditional parent families. The role choices selected will affect the labeling of the parents on reports, such as the Family Group Sheet.

Name Boxes

The **Father Name** box and the **Mother Name** box are where the actual names of the parents are entered. The pairing of two names will automatically generate a Family record for the two parents. If only one parent is known, leave the other box blank.

Relation Boxes

The **Father Relation** box and the **Mother Relation** box indicate the type of parent relation. A different relationship type can be set for each parent. Click on the box to see the choices on the drop-down list:

Biological parent
Adoptive parent
Foster parent
Stepparent
Godparent
Sealing parent
Direct ancestor
Relative
Other
Unknown

- **Biological parent:** a birth parent.
- **Adoptive parent:** this parent formally adopted the child.
- **Foster parent:** this individual is serving as a foster parent.
- **Stepparent:** this individual is a spouse of a biological parent.
- **Godparent:** this individual served as a sponsor at the current individual's baptism.
- **Sealing parent:** this individual was sealed as a parent in an LDS sealing ordinance.
- **Direct ancestor:** research indicates this individual is a direct ancestor, but there may be intervening generations.
- **Relative:** this individual is known to be a relative, but the exact relationship is unknown, or is other than biological parent or direct ancestor.
- **Other:** any other type of parent.
- **Unknown:** this individual appears to be parent, but no evidence is available to indicate the relationship.

General and Research Notes

Use the **General Notes** box to record your notes about the parent link. If the link is not biological, you can explain the relationship type.

Use the **Research Notes** box to record the status of your research on the link.

Research Target Button

Click on the **Research Target** button to create a research target for the current parent link record with the [Research Target View](#). The button will appear bold when a research target has been defined.

Source Citation Buttons

There are four **Source Citation** buttons on the Parents page:

- Parents Link (next to the **Parents Selector** box)
- Multiple Birth Grouping (next to the **Multiple Birth Group** box)
- Father Link (next to the **Father Relation** box)
- Mother Link (next to the **Mother Relation** box)



Each of these buttons allow you to enter source citations, and will indicate the current surety level. Use the **Parents Link** button to record source citations for the parents when your source is for both parents. Use the **Father Link** or **Mother Link** buttons when your source is for only one parent. See the chapter [Citing your Sources](#) for more information.

Defining Event Button

The **Defining Event** button allows you to associate an event record with this parents link record. The defining event for a adoptive parent link would be the event of adoption, for example. When a defining event has been entered, the button will be bold and clicking it will cause a jump to the linked event record on the [Events page](#).

Subrecord Controls

The **subrecord controls** appear in the top right corner of the page. The **Subrecord ID** box displays the unique ID of the current parents record.

- To move to a different parents record for the current individual, use the **horizontal scrollbar**. If the "thumb" occupies the entire width of the scrollbar, then there are no other parent records defined.
- To add a new parents record, click the **New Subrecord** button . Or, on the **Data** menu, click **Add Parent Link**.
- To delete the current parents record, click the **Delete Subrecord** button . Or, on the **Data** menu, click **Delete Parent Link Record**.

You can also add new parent records with the **Parents Selector** box, or with the keyboard shortcut CTRL+L.

Splitter Bar

There is a vertical **splitter bar** between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

Individuals View: Family Page

In Genbox, a **family** is defined as a relationship between two or more individuals, either:

- Two individuals are linked to each other by a family event, such as marriage.
- One or two individuals are linked as parents to one or more children.

A family can have both types of relationships, in which case the two individuals linked to each other are the parents of the children.

The pairing of an individual with each of his or her spouses constitutes a different family, which is represented with a different family record.

The **Family page** displays information on families. In particular, it displays information about spouses. One family record is displayed at a time. The current family record is selected by choosing from the spouses of the current individual.

Smythe.GDB: Individuals (27 Records)

1 Reginald Edward SMYTHE (1780 - 1826)

Summary Pedigree Identifiers Attributes Parents Family Events Contact Notes

Family1: Elizabeth Conyer (1786 -) 3

☐ Pref ☐ Partners ☐ Private ☐ Exclude ☐ Alt Children: 0

Family Event	Date	Place	Child
Marriage License	10 Jul 1803	Cambridge, Cambridge...	
Marriage	15 Jul 1803	Burnt Pelham, Hertfords...	
Annulment	10 Aug 1803	Chancery Court, London...	
Add Event			

General Notes for Family: Research Notes:

Spouse Box

The **Spouse Selector** box appears at the top of the page, and displays the names of spouses. It identifies the **current** family record.

- To select a different family record to view or edit, click this box and select the spouse from drop-down list.
- To add an additional spouse and family record, click this box and then click **add** from the drop-down list. Type the name of the new spouse.

You can also select family records and add new records using the subrecord controls.

Check Boxes

A number of check boxes can be checked for each family record:

Pref (preferred spouse)

The **Preferred spouse** is the spouse that will be used elsewhere in the program when a single spouse is required, such as on the [Summary page](#) for the default spouse to display, and on reports where a different content set can be specified for the preferred spouse. Only one spouse can be marked preferred for each individual. When this check box is checked, it will automatically be cleared for other family records for the current individual. If no spouse is marked as preferred, the spouse of the first family record will be used as the preferred spouse.

Partners

The **Partners** check box should be checked when the current individual and "spouse" are not known to have been married. When marked as partners, the "spouse" label will change on this page to "partner", and references on reports will also be changed so that they are not referred to as spouses of each other.

Private

The **Private** check box is enabled when the **Partners** check box is checked. It allows the "partners" designation to be private. The effect is that output reports will treat the two individuals as spouses; they will be treated as partners only within the program.

Exclude

Checking the **Exclude** check box will cause the link to the current spouse to be ignored when producing charts and reports. This can be used in two ways: to hide data that is considered inferior or incomplete, or to purposely introduce breaks in a genealogy to effectively "prune" a genealogical tree.

Alt (alternate spouse)

Checking the **Alt link** check box indicates that the current spouse is considered an **alternate**, rather than an **additional** spouse. An alternate spouse would be treated on narrative reports as a research possibility.

Children Box

Sometimes your research will provide the total **number** of children for a family, but the names of the children will be missing or incomplete. The **Children** box provides a place to store this total **number** of children in such a case.

Family Events List

The **Family Events** list contains one row for each family event for the current family. Family events include Marriage-related events and Childbirth events. The [Summary page](#) also has an events list, but that list includes all events for the current individual. The **Family Events** list provides a view of just the events linked to the current family. There are three columns: **Family Event Type**, **Date**, and **Place / Child**. Events are shown in chronological order.

- To add a new family event for the current family, click where it says "Add event" and choose the event type from the dropdown list. Enter the date, place, and child, if any.

General Notes and Research Notes

Use the **General Notes** box to record your notes about the family. If the family is not a nuclear family, you can use the notes to describe the relationships and background.

Use the **Research Notes** box to record the status of your research on the links.

Research Target Button

Click on the **Research Target** button to create a research target for the current family record with the [Research Target View](#). The button will appear bold when a research target has been defined.

Media Control

The **Media** control is the open area to the right of the middle boxes. It initially displays the first picture that is linked to the family, if any. Any number of multimedia objects can be linked to each family. Multimedia can also be linked to individuals on the [Summary page](#) and to events on the [Events page](#). Multimedia linked on the **Family** page should be more closely related to the family as a group than to either spouse or to a particular event. A good example is a family portrait. See the chapter [Adding Multimedia](#) for help on the **Media** control.

Source Citation Buttons



There are two **Source Citation** buttons on the Parents page:

- Spouse Link (next to the **Spouse Selector** box)
- Children Count (next to the **Children Count** box)

Each of these buttons allows you to enter source citations, and will indicate the current surety level. See the chapter [Citing your Sources](#) for more information.

Subrecord Controls

The **subrecord controls** appear in the top right corner of the page. The **Subrecord ID** box displays the unique ID of the current family record.

- To move to a different family record for the current individual, use the **horizontal scrollbar**. If the "thumb" occupies the entire width of the scrollbar, then there are no other family records defined.
- To add a new family record, click the **New Subrecord** button . Or, on the **Data** menu, click **Add Family**.
- To delete the current family record, click the **Delete Subrecord** button . Or, on the **Data** menu, click **Delete Family Record**.

You can also add new family records with the **Spouse Selector** box, or with the keyboard shortcut CTRL+L.

Splitter Bars

There are three **splitter bars** on the Family page. There is vertical splitter bar to the left of the **Media** control. Drag it to the right when you need more space for the **Family Events** list. There is a horizontal splitter bar above the **Notes** boxes. Drag it up when you need more space to read the notes. There is a vertical splitter bar between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

Individuals View: Events Page

The **Events page** is perhaps the central focus of the Genbox program. It is here that the details of all events are entered and viewed. If the individual links form the skeleton of a genealogy, it is the event details that provide the meat. Genbox supports an unlimited number of event types, defined on the [Event Types View](#). An event type definition provides a wealth of structure about an event, which is used to produce flowing narrative text on reports.

On the Events page, one event record is displayed and edited at a time.

While events often involve several individuals, there is not a separate "Events View" in Genbox. Instead, the event records are shown as a page on the Individuals View, subordinate to the current individual; however, the same event record will be viewable there for **each** of the primary individuals involved. This design allows the display and entry of the event data to be tailored to the context of the current individual. In particular, the event templates can be different, depending on the context of the current individual.

Smythe.GDB: Individuals (27 Records)

1 **Reginald Edward SMYTHE (1780 - 1826)**

Summary Pedigree Identifiers Attributes Parents Family **Events** Contact Notes

Event: Birth Age: 1

Date: 3 August 1780

Place: Little Chesterford, Essex, England

at:

Parents: Sir Charles SMYTHE Jane EDWARDS

Default [P] was born [T] [D+L]

Detail:

Witnesses	Role
Add witness	

General Notes for Event: Reginald's mother died in childbirth. Anna Chordray, the wife of Sir Charles' gardener, was enlisted to serve as wet nurse and nanny.

Research Notes for Event:

Event Type Box

The **Event Type** box displays the event type for the current record. Event types are defined on the [Event Types View](#).

When editing an existing record, the drop-down list contains one row for each event record defined for the current individual, in chronological order. Basic event types will also appear in *italics* on this list. To view a different event record for the current individual, select it from this list.

Adding New Events

To add a new event for the current individual, display the drop-down list and choose "...add", which is near the bottom of the list. The drop-down list will be replaced with the full list of defined event types. Make your selection, then start entering the date, place, and other data.

You can add new basic events an easier way. On the drop-down list, you will see some event types shown in *italics*. These list entries are basic event types for which there are no event records for the current individual. You can create a new record for the indicated basic event type by selecting it.

Changing the Type of Event

Sometimes you may wish to change the event type for an existing event record. To do this, select "...change type" from the bottom of the Event Type drop-down list. You will be presented with the full list of event types to choose from.

Event Template Link Button

Click the **Event Template Link** button to jump to the active event template on the [Event Types View](#). You can make changes to the default templates there.

Age Box

When a date is specified for the event and the birth date of the individual is known, the age of the individual at the time of the event will be automatically computed and shown in the **auto-generated text font style**. You can also manually enter the age at the time of the event, in which case the value will be shown in the normal font style.

Date Box

The **Date** box displays the date of the event. Dates can be entered in a variety of ways. For help, see the section [Entering Dates](#).

Place Box

The **Place** box displays the location at which the event took place. The place values displayed in this box begin at the city/town level. Local site information is displayed in the [Local Site box](#). If a place name with a local site or leading modifier is typed into this box, the local site portion will automatically be moved to the **Local Site** box.

Genbox has special processing for the entry of place names. For help, see the section [Entering Places](#).

Double-click the **Place** box to jump to the linked place record on the [Places View](#).

Local Site Box

The **Locate Site** box displays the local site at which the event took place. The local site is defined to be located within the place displayed in the [Place box](#). On the Events page, local sites are displayed and entered separately from other place levels to provide for greater flexibility:

- Local sites can have their own source citations, separate from the place source citations. This is helpful when the sources used to determine the local site are different from those used to identify the higher place level.
- Event type-specific labels can be defined for local sites, which can help prompt the user to enter the correct information.
- Multiple levels of local sites can be entered, each separated with a comma. This allows you to structure your local site information with as many levels as you wish. A separate place record will be created for each local site level.

In other parts of the program, such as on the Summary page when editing the **Events** list, local site and place information is entered and displayed in one field. When entering a local site into a place field, you can type a SEMI-COLON to separate the local site name(s) from the city/town name, to help Genbox recognize the proper levels for the information.

Genbox has special processing for the entry of place names. For help, see the section [Entering Places](#).

Double-click the **Local Site** box to jump to the linked place record on the [Places View](#).

Secondary Data Box

The **Secondary Data** box provides a place to enter the names of other data records that are linked to this event. The type of data you can link is dependent on the "Secondary" setting of the associated event template record:

Event Template Secondary Type:	Box Label and Appearance:	Usage:
Omit	(not shown)	(box is not shown)
Parents link	"Parents". The box is divided into two boxes, one for entry/display of each parent.	Entry of parents associated with an event, as for Birth and Baptism.
Spouse link	"Spouse", or Secondary label	Link to spouse. The name of the spouse can be viewed or entered. Used primarily with marriage-related events.
Other ind link	"Other Ind", or Secondary label ("Associate")	Link to other individual. Like a Spouse link, but no family relationship is implied between the two individuals. The name of the other individual can be viewed or entered.
Name variation	"Name"	Link to any identifier on the Identifiers page. The identifier text can be viewed and edited.
Identifier	Identifier Type ("SSN", "AFN", etc.)	Link to an identifier of a specific type on the Identifiers page. The label left of the box will identify the type of identifier expected. The identifier text can be viewed and edited.
Contact	"Address"	Link to contact record on the Contacts page. Drop-down list. This provides a way to specify an address related to an event, which is useful for the "Residency" event. For transient events, address information should be treated as normal text, rather than creating a Contacts record to store it.

Event Subtype Selector

When the Event Type of the event record has multiple templates defined, a drop-down list box will appear to the left of the **Template** box to allow you to choose one of the subtypes. The subtype selector will also indicate when the default template has been modified by adding parentheses to the subtype name, as in "(stillborn)".

Note: only the event subtypes of the event type that are defined for the current program language will be shown.


Template Box

The **Template** box displays the sentence template that will be used on narrative reports to format the data into a sentence. Each Event Type has at least one default template defined.

The templates are shown in the currently selected output language.

You can use the default template as is, or you can edit the template to create a custom template just for use with the current event record. Editing the default templates will provide additional variety to the sentence structures on the reports. For help on constructing event templates, see the chapter [Event Templates](#).

Template Preview Button

Click the **Template Preview** button  next to the **Template** box to open the [Template Preview Dialog](#) where you can test your template and see how your event data will look formatted on a report.

Detail Box

The **Detail** box provides a place to enter extra factual information related to an event. The label to the left of the box can provide a hint as to what type of additional data is expected by the sentence template, as it will appear where the **[T]** sentence code is placed. Each event subtype can have its own hint to suggest what type of additional data is expected in the detail box. The hint might be something like "Achievement", "Rank", "Award", "Item", or "Status".

If the event template record for the current event type has the **attribute** flag set, the text entered into the Detail box will also be shown on the Attributes page. The name of the attribute will appear to the left of the detail box. Attributes are used for data items such as caste name, physical description, national origin, occupation, religion, hobbies, etc.

Witnesses List

The **Witnesses List** provides a place to enter the names of individuals who were witnesses at the current event. A witness, as used in Genbox, is an individual who was at an event that had a **non-principal** role. An event can have up to three principal roles: primary individual, spouse, and child or "other" individual. For a birth event, the principal individuals are the father, mother, and child. For a marriage event, the principal individuals are the primary and spouse. For an association event, the principals are the primary and other individual. Principals of an event can also be added as witnesses to an event. This can be useful when they serve additional roles, or when you wish to record that a father was physically present at a child's birth.

Witnesses are useful to track because they can provide hints to family relationships or to further research leads. Because they can be people of genealogical interest, the **Witnesses List** is implemented as links into the Individuals Table. This means witnesses have their own individual record which can be viewed in the Individuals View just like all other individuals.

The **Witnesses List** has five columns: [Name](#), [Role](#), [Template](#), [Source Citation](#), and [Exclude](#).

- **To add a witness to the current event**, click where it says "Add witness" and type the name of the witness. Press TAB to enter the role.

Witness Name

Type the name of the witness into this box. If this is a new individual name, you will be asked if you would like to create a new individual record.

Witness Role

Each witness can have a **role** in the event. You can type any descriptive name you want here. Some Event Templates have predefined roles, which have their own witness sentence templates. If you type the name of a predefined role, the corresponding template will be the default template for use on reports.

Witness Template

The **Witness Template** column displays a magnifying glass as the label. Click a check box in this column to open the [Witness Template Preview Dialog](#), where you can customize the default witness template for use with the current event and witness. A check mark indicates that a custom witness template has been defined.

Witness Source Citation

The **Witness Source Citation** column contains "open book" icons that indicate the surety level for the current witness information. Click an icon to open the [Citations View](#) to enter source citation information. For help, see the chapter [Citing your Sources](#).

Exclude Witness

The Exclude Witness check box can be used to omit the witness information from reports generated for principals of the event.

General Notes and Research Notes


Use the **General Notes** box to enter notes for the current event. Genealogical events are rich in details that can best be described in sentences.

Use the **Research Notes** box to record your research efforts regarding the current event.

Research Target Button

You can also make the event a target for further research by clicking on the **Research Target** button. This will open the [Research Targets View](#). When the current event has been linked to a Research Targets record, the **Research Target** button will be shown in bold.

Source Citation Buttons

There are six **Source Citations**  buttons on this view. You can enter source citations that apply to the entire event by clicking on the source citation button next to the **Event Type** box. You can also enter separate source citations for each of the five main data boxes (**Age, Date, Place, Local Site, Detail**) by clicking on the source citation buttons next to each of these text boxes.

Note Number Placement on Reports

When an event-level citation has been entered, or when all data items have a separate citation, narrative reports that include the event will merge all of the citations for the event into a single footnote/endnote, with the note number appearing at the end of the sentence or clause. When there is no event-level citation and only some of the data items have a citation entered, a separate note number will appear on each of the data items with citations. For example: if you have documentation for the place of an event but not the date, reports will show the footnote number immediately after the place instead of the end of the sentence, so that readers will know which parts of the statement have not been documented.

For help on entering source documentation, see the chapter [Citing your Sources](#).

Alt Check Box

The **Alt** check box marks an event record as an **alternate**. When clicked, you will be prompted to indicate which other event the current event record is an alternate to. Alternate events are a way to enter conflicting data for the same event. When you have two sources that disagree about a date, a place, a spouse, or some other detail of an event, you can create an alternate event record to store the second set of data, and attach its own source citations. An event record can have several alternates.

By marking an event record as an alternate and indicating which event it is an alternate to, Genbox will be able to **merge** the data when producing a report. The surety levels, source citations, commonalities and differences will all be employed to create report text that describes the conflict. If multiple events of the same type are entered **without** marking them as alternates, Genbox will treat them as several different events, all processed separately.

When you begin editing a new alternate event record, the data values from the base event record will be visible in dimmed text. You can enter your conflicting data normally; it will be shown in normal text. This "composite view" allows you see where the alternate record differs from the base record, and where it doesn't.

Exclude Check Box

Click the **Exclude** check box to prevent the data in the current event record from being included on charts and reports. This is useful when you feel the data is inaccurate or incomplete, or you are creating a special report and excluding individual events is the easiest way to customize the included data.

Directional Template Button

When the current event type has been defined on the [Event Types View](#) as having a secondary type of **Other Individual Link**, and is marked **Directional**, then there will be a pair of sentence templates available: the *Forward* template and the *Reverse* template. The **Directional Template Button** will appear near the top of the page, between the [Event Template Link Button](#) and the [Event Source Citation Button](#). It will display the label "F" when the forward template is selected, and "R" when the reverse template is selected. Clicking the button will reverse the direction. Whichever direction is selected for the current (focus) individual, the linked other individual will have the template for the opposite direction. There is no special significance as to which individual gets the "forward" direction. The designation is only used in the selection of the appropriate event template.

To illustrate how this button is useful, consider the **Association (ASSO)** event type. This is a directional "Other Individual Link" event type. It can be used for any non-genealogical relationships between two individuals. In addition to the two default templates, there are two subtypes defined: "Client" and "Administrator". Each subtype can have its own pair of forward and reverse templates. In this case, the special template code [ET] is used to reference the subtype label, allowing the default templates to simply be reused.

- **Forward:** [P] was <[ET]|an associate> of [O] [T] [D+L]
- **Reverse:** [O] was [PP] <[1ET]|associate> [D+L]

So if Reginald Edward Smythe has a forward association link to George van Stone with a subtype of "client", then George van Stone will have the reverse client template, resulting in the pair of sentences:

Reginald was a client of George van Stone. (appears in Reginald's narrative report)

Reginald Edward Smythe was George's client. (appears in George's narrative report)

Now, if you look at the sentences and suddenly think "Hey--it's really supposed to be George is a client of Reginald's!", it's easy to reverse the relationship. Simply click the **Directional Template Button**. Then the templates would read:

George van Stone was Reginald's client. (appears in Reginald's narrative report)

George was a client of Reginald Edward Smythe. (appears in George's narrative report)

Directional templates can be used for any type of event between two individuals. Remember, the [P] code is usually for the individual that has the focus (the subject of the report), and the [O] code is for the other individual. For the reverse template, which is used when the previous "other individual" has the focus, the individual references will be reversed. If you use active voice in the forward template and passive voice for the reverse template, [P] and [O] will appear in the same order for both. If you want active voice for both directions, the codes will need to be reversed:

Forward: (Active)	Reverse: (Passive)	Reverse (Active)
[P] hired [O] [D+L]	[P] was hired by [O] [D+L]	[O] hired [P] [D+L]
[P] murdered [O] [D+L]	[P] was murdered by [O] [D+L]	[O] murdered [P] [D+L]
[P] visited [O] [D+L]	[P] was visited by [O] [D+L]	[O] visited [P] [D+L]



By defining a pair of templates for these types of events, you only need to enter the event information once: date, place, details, notes, source citations, and the individuals involved. Then the event sentence will read correctly regardless of which individual is selected as the focus of a narrative report.

Media Control

The **Media** control is the open area to the right of the middle boxes. It initially displays the first picture that is linked to the event, if any. Any number of multimedia objects can be linked to each event. Multimedia can also be linked to families on the [Family page](#) and to individuals on the [Summary page](#). Multimedia linked on the **Events** page should be more closely related to the current event than to a family unit or to an individual. See the chapter [Adding Multimedia](#) for help on the **Media** control.

Subrecord Controls

The **subrecord controls** appear in the top right corner of the page. The **Subrecord ID** box displays the unique ID of the current event record.

- To move to a different event record for the current individual, use the **horizontal scrollbar**. If the "thumb" occupies the entire width of the scrollbar, then there are no other event records defined.
- To add a new event record, click the **New Subrecord** button . Or, on the **Data** menu, click **Add Event**.
- To delete the current event record, click the **Delete Subrecord** button . Or, on the **Data** menu, click **Delete Event Record**.

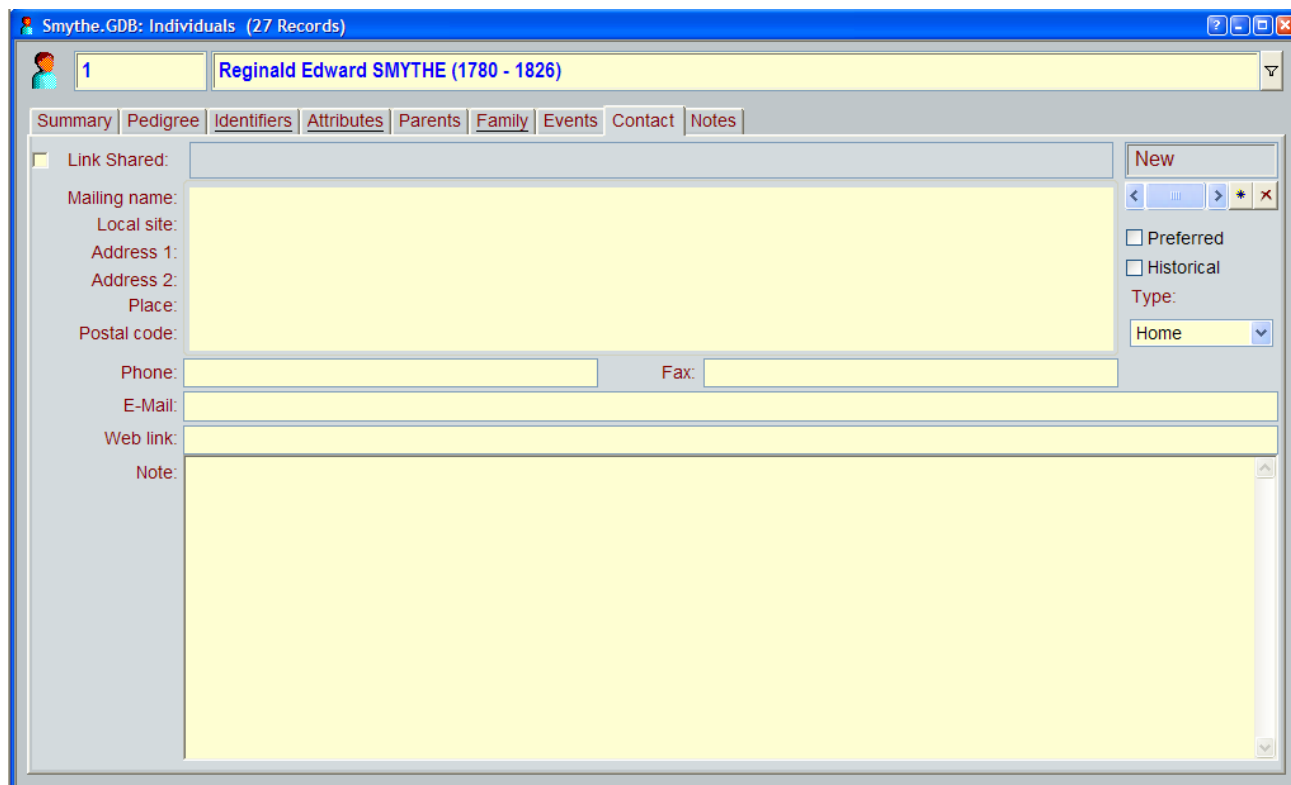
You can also add new event records with the **Event Type** box, or with the keyboard shortcut CTRL+L.

Splitter Bars

There are three **splitter bars** that allow you to adjust the sizes of the areas on this page. There is vertical splitter to the left of the **Media** control. You can drag this splitter to reduce the area for the **Media** control if you need more space to display local site, detail, template, and witnesses information. There is a horizontal splitter between the **Witnesses** list and the **Notes** boxes. You can drag this splitter to increase the display area for either witnesses or notes. There is a vertical splitter bar between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

Individuals View: Contact Page

The **Contact** page contains information on addresses for the current individual.



Shared Address Check Box

Contact records in Genbox can be **shared** by multiple individuals. This feature is useful when several individuals maintained in the database reside at the same address. Rather than recording their address information separately, a **shared address** can be used instead. Any changes to a shared address are immediately reflected to all individuals in the group. This also saves on postage and paper when sending out mailings, as only one letter will be sent for the group.

1. To create a **shared address**, first enter the address normally.
2. Click the **Shared Address** check box.
3. Type a shared name into the **Shared Name** box.

Once a shared address has been defined, it can be selected for other individuals when viewing their Contact page.

1. To link to a **shared address**, start with a new, blank contact record.
2. Click the **Shared Address** check box.
3. On the Shared Contact Pick Dialog, click on the desired group name. Click **Select**.

When viewing a shared address, the address boxes will be shown in **dimmed text**. This is to indicate that this data is being shared. The **Mailing Name** box, however, will be shown normally. The mailing name is not shared. It continues to serve as the mailing name for the address when the shared address feature is disabled.

Shared Name Box

For mailings to a shared address, a special mailing name is needed. The **Shared Name** box provides a place for this name. It can be something like "Mr. and Mrs. Reginald Smythe", or "The John Mulrooney Family". The shared name is also used to identify and select shared addresses; for this reason, shared names must be unique among all shared contact groups.

Mailing Name Box

The **Mailing Name** is the name for the current individual that will be used when formatting addresses for individuals. Names used in mailings are often in a specialized format, with formal titles and other additions. This box provides a place to specify the text to use for the name. If left blank, the preferred name will be used on reports.

Local Site Box

If this address includes a local site, such as a building, enter it in the **Local Site** box.

Address Boxes

Enter the street address information into the **Address 1** and **Address 2** boxes. **Address 2** can be left blank.

Place Box

Enter the place name in the **Place** box. See the section on [Entering Places](#) for information.

Postal Code Box

Enter the postal code (ZIP for U.S. addresses) into the **Postal Code** box.

Phone and Fax Boxes

Enter the principle telephone number in the **Phone** box, and the facsimile machine number, if any, in the **Fax** box.

E-Mail Box

Enter the E-mail address into the **E-Mail** box. (E-mail addresses have the "@" character in them.)

Web Link Box

Enter the home page URL associated with this contact, if any, in the **Web Link** box. This is a text string that usually begins with "http://www".

Note Box

The **Note** box provides a place to enter any other type of contact information.

Preferred Check Box

One address for each individual can be marked **Preferred**. The preferred address will be used on reports when a single address is needed.

Historical Check Box

If an address is being maintained for historical purposes, click the **Historical** check box. This serves to distinguish addresses that are genealogical data from addresses of current contacts.



Address Type Box

The **Address Type** box provides a drop-down list where you can identify the type of address:

Home
School
Work
Other

Subrecord Controls

The **subrecord controls** appear in the top right corner of the page. The **Subrecord ID** box displays the unique ID of the current contact record.

- To move to a different contact record for the current individual, use the **horizontal scrollbar**. If the "thumb" occupies the entire width of the scrollbar, then there are no other contact records defined.
- To add a new contact record, click the **New Subrecord** button . Or, on the **Data** menu, click **Add Contact**.
- To delete the current contact record, click the **Delete Subrecord** button . Or, on the **Data** menu, click **Delete Contact Record**.

You can also add new contact records with the keyboard shortcut CTRL+L.

Individuals View: Notes Page

The **Notes page** provides a place to enter general notes and research notes about the individual.

General Notes

Use the **General Notes** box to enter any comments about the individual that are not specific to a particular identifier, link, spouse, or event.

Research Notes

Use the **Research Notes** box to record your research efforts regarding the current individual.

Splitter Bar

There is a vertical **splitter bar** between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

Places View

Places in Genbox are treated like other data. Each place is represented by its own record, viewable in the **Places View**. Each place is defined with a level from a six-level hierarchy. A place can have multiple names defined, its own associated media, notes, and citations.

[General Page](#)

[Names Page](#)

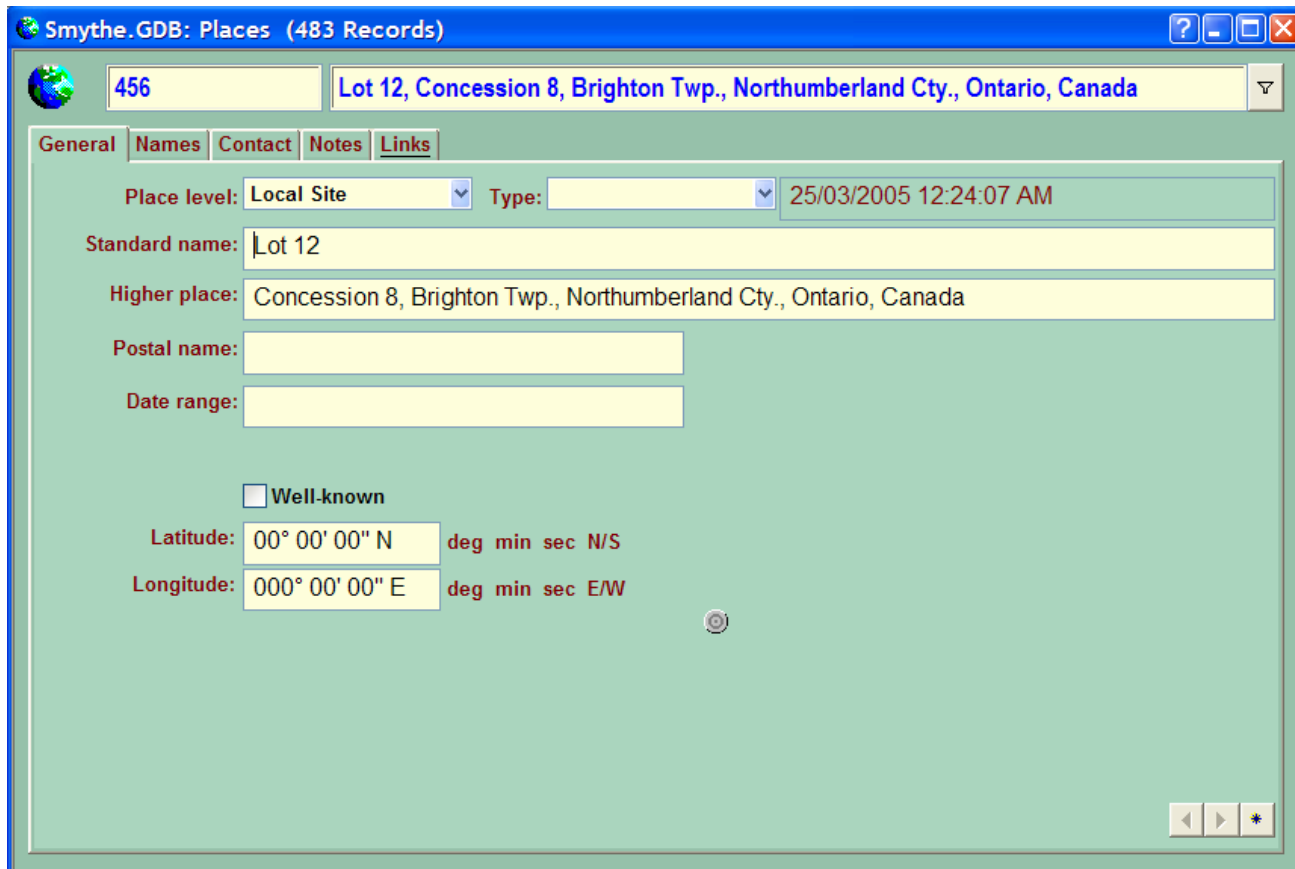
[Contact Page](#)

[Notes Page](#)

[Links Page](#)

Places View: General Page

The **Places General** page provides data entry for the place level, standard name, multimedia, and a number of other data items.



The screenshot shows a software window titled "Smythe.GDB: Places (483 Records)". It has a search bar with "456" and a location bar with "Lot 12, Concession 8, Brighton Twp., Northumberland Cty., Ontario, Canada". Below these are tabs for "General", "Names", "Contact", "Notes", and "Links". The "General" tab is active, showing fields for "Place level" (set to "Local Site"), "Type" (a dropdown), and a timestamp "25/03/2005 12:24:07 AM". Other fields include "Standard name" (Lot 12), "Higher place" (Concession 8, Brighton Twp., Northumberland Cty., Ontario, Canada), "Postal name", "Date range", a "Well-known" checkbox, "Latitude" (00° 00' 00" N), and "Longitude" (000° 00' 00" E). Navigation buttons are at the bottom right.

Place Level

The **Place level** box displays the **place level** for the current place record. The drop-down list displays the 6 level names:

Nation/Area
State/Province
County/Parish
Township
City/Town
Local Site

For an explanation of place levels, see the section [Place Level Hierarchy](#).

You can change the place level for a place by choosing a new selection from the drop-down list. Some of the choices may be disabled: when there are links to a place from lower place records, you cannot change the place level to be the same or lower than one of places that are linked to it. Likewise, you cannot change it to be equal or higher than the place level of its own parent.

Note The choice of place level affects which other boxes are available on this page.

Local Site Type

For local site place records, the **Local Site Type** box will be available to set the type of local site. The drop-down list displays the following choices:

Archive
Business
Cemetery
Church/Religious
Courthouse
Farm
Gov't Office
Hospital
Landmark
Library
Lot/Property
Museum
Other
Publisher
School
Society
Temple (LDS)

Setting a value for local site type will be helpful when performing data searches. When new local sites are typed into place data boxes, Genbox will assign an initial value for local site type.

Change Date

The **Change date** box displays the date and time this place record was last edited. It is read-only.

Standard Name

The **Standard name** box displays the name for the current place record. Additional names for the current place can be entered on the [Places Names Page](#).

The standard name represents a single place level. For example: for a city, you would enter just a city name in this edit box, not the county, state, or nation. These "higher levels" should be entered in the **Higher Place** box. Local sites are special: they can encompass several "conceptual" levels, separated by commas, such as "East balcony, Fourth floor, City Government Building". Place levels higher than local site should **not** contain commas.

Higher Place

The **Higher place** box displays the names for the linked higher place records. A double-click will jump to the next higher place record.

Postal Name

The **Postal name** box is available to enter a street address or other postal designation for the current place. The postal name is stored as a place name variant, and can also be viewed/entered on the [Places Names Page](#).

Note If the standard name for the place is marked as "postal", then the Postal Name box will show the same name and it will be disabled. If you want to enter a separate postal name, you will need to go to the Places Names Page and clear the "Postal" flag on the standard name first.

Date Range

The **Date range** box can be used to enter the start and end dates for the associated place.

Historical check box

For nation/area place records, the **Historical** check box is used to mark nations/countries that no longer exist.

Default Nation check box

For nation/area place records, check the **Default nation** check box to omit the nation/country name from being shown when place information is displayed.

Well-Known check box

For city/town place records, check the **Well-known** check box to indicate cities that don't need to be shown with higher place name levels, such as "Chicago" and "London". This affects output on charts and reports only.

Latitude and Longitude

The **Latitude** and **Longitude** boxes allow you to enter the exact location of a place. Future versions of Genbox may provide mapping, search, and distance calculation capabilities using this information. The boxes are divided into four data entry fields, which you move between by typing the SPACE BAR or RIGHT/LEFT arrow keys. The punctuation is not typed.

- To enter a **latitude** value, click on the left side of the box and type the degrees 0-90. Press the SPACE BAR.
- Type the minutes, 0-59. Press the SPACE BAR.
- Type the seconds, 0-59. Press the SPACE BAR.
- Indicate north latitude by typing 'N' or south latitude by typing 'S'.

Values can be entered by typing the number, or by using the UP/DOWN arrow keys to increment/decrement the value.

- To enter a **longitude** value, click on the left side of the box and type the degrees 0-180. Press the SPACE BAR.
- Type the minutes, 0-59. Press the SPACE BAR.
- Type the seconds, 0-59. Press the SPACE BAR.
- Indicate west longitude by typing 'W' or east latitude by typing 'E'.

Media Control

The **Media** control is the open area to the right of the middle boxes. It initially displays the first picture that is linked to the place, if any. Any number of multimedia objects can be linked to each place. Multimedia linked to places should be more closely related to the current place than to an individual, family unit or to a particular event. See the chapter [Adding Multimedia](#) for help on the **Media** control.

Research Target Button

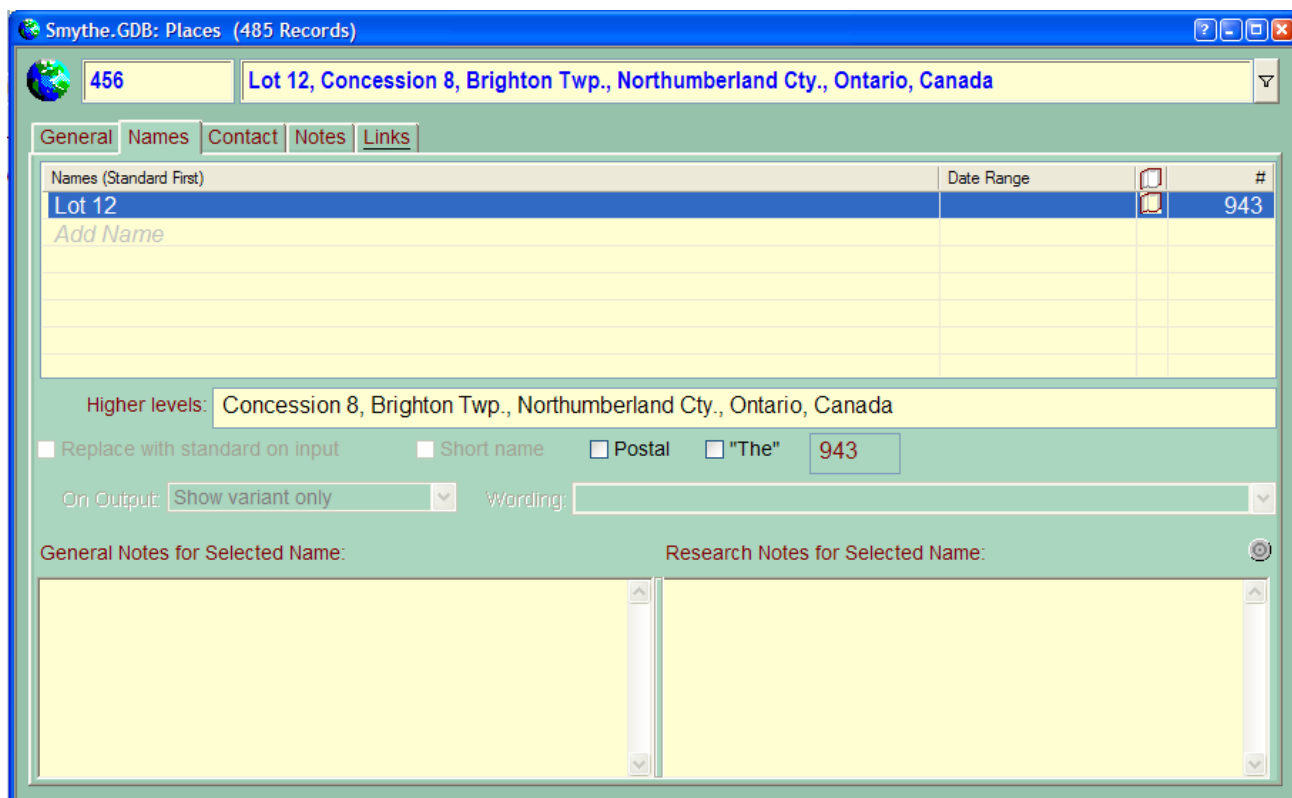
You can make the current place a target for further research by clicking on the **Research Target** button. This will open the [Research Targets View](#). When the current place has been linked to a Research Targets record, the **Research Target** button will be shown in bold.

Places View: Names Page

Genbox supports multiple names for each place. The **Places Names page** shows a list of the names defined for a place. The standard name is listed first.

When a data record links to a place, it is actually linking to a particular place name, which in turn is linked to the place record. This provides several advantages:

- A data record can reference a place name that matches the exact wording and spelling as found in its source documentation, while also indirectly referencing the standard name for the same place.
- A mapping of the uncommon name to the standard name can be produced.
- A cross-reference entry in the index can be added.
- Multimedia linked to the place record can be used to illustrate any of the place name variants.



Smythe.GDB: Places (485 Records)

456 Lot 12, Concession 8, Brighton Twp., Northumberland Cty., Ontario, Canada

General Names Contact Notes Links

Names (Standard First)	Date Range	#
Lot 12		943
Add Name		

Higher levels: Concession 8, Brighton Twp., Northumberland Cty., Ontario, Canada

☐ Replace with standard on input ☐ Short name ☐ Postal ☐ "The" 943

On Output: Show variant only Wording:

General Notes for Selected Name: Research Notes for Selected Name:

Place Names List

The **Places Names** list contains one row for each name defined for a place. The standard name is listed first. When a row is selected, related data is shown in the boxes below. There are four columns: [Name](#), [Date Range](#), [Source Citation](#), and [Record ID](#).

Name

Enter the place names into the **Name** column. Enter only the name piece for the current level.

- **To add a new name to the current place**, click where it says "Add Name". Type the new name.
- Commas are not allowed in place names at the city level and higher.
- Local site names can contain commas. This allows you to have several divisions in your local site name, such as "Room 212, Fourth floor, St. Luke Hospital".

Date Range

Enter the **date range** over which the name is valid. The beginning of the date range would be when the name was first used. Names that are still valid should have no ending date.

Source Citation

Click the **Source Citation** button to enter a source citation for the current place name.

Record ID

The **Record ID** value for the current place name is shown in this column. This data is read-only.

Higher Levels

Each name variation can have its own **Higher Level** place. This feature allows a place to be part of different and possibly overlapping higher places.

Replace with Standard On Input check box

When **Replace with standard on input** is checked, this name variant will automatically be replaced by the standard name when it is typed into a place box on the Events page and other pages where places are entered. For example, suppose we have a place record for the state "Missouri", and it has a name variant "MO" that has **Replace with standard on input** checked. On the [Events page](#), you click on the **Place** box, type "St. Louis, MO", and press ENTER. The text is automatically changed to "St. Louis, Missouri".

There are some advantages to having certain name variants automatically replaced with the standard names.

- It adds consistency. It prevents having a database intermixing "MA", "Mass.", and "Massachusetts".
- You can define abbreviations for long names to save on keystrokes when typing data.
- You can define misspellings as name variants to have the data automatically corrected on entry.

Short Name check box

The **Short name** check box is used to mark names that are acceptable as shortened forms of the standard name. The **Use short names** report option makes use of this information.

Postal check box

The **Postal** check box is used to mark names that are postal designations for the place, such as a street address for a local site, or a postal abbreviation for a state or nation.

"The" check box

Some place names, such as the United States and the Netherlands, are commonly shown with the definite article "The" when the name is used in isolation. When used with lower places, the article is omitted. The **"The"** check box indicates this usage.

Record ID

The **Record ID** box displays the Place Name ID of the current record. It is read-only.

Variant Output and Wording

When a data record links to a name variant, there are some choices as to how to format the data for output. The **Variant Output** box has a drop-down list with the following choices:

Show variant only
Show standard only
Variant (<wrd> standard)
Standard (<wrd> variant)

When the third or fourth choice is selected, the **Bridge Wording** box is enabled. It has a drop-down list of bridge wording choices. You can also type in your own bridge wording.

(omit)
now
now in
today's
in today's
today known as
now known as
also known as

Using bridge wording, you can produce output from event records with place name variants such as:

He was born in Leningrad (St. Petersburg).
 She was born in Peking, China (today known as Beijing).
 She died in Broad Ripple, Clinton County (now Boone County¹), Kentucky.

¹Clinton County was merged with Boone County in 1858.

General Notes and Research Notes

Use the **General Notes** box to enter notes regarding the selected place name variant. You could describe the circumstances under which the name was given, for example.

Use the **Research Notes** box to record your research efforts regarding the selected name variant.

Research Target Button

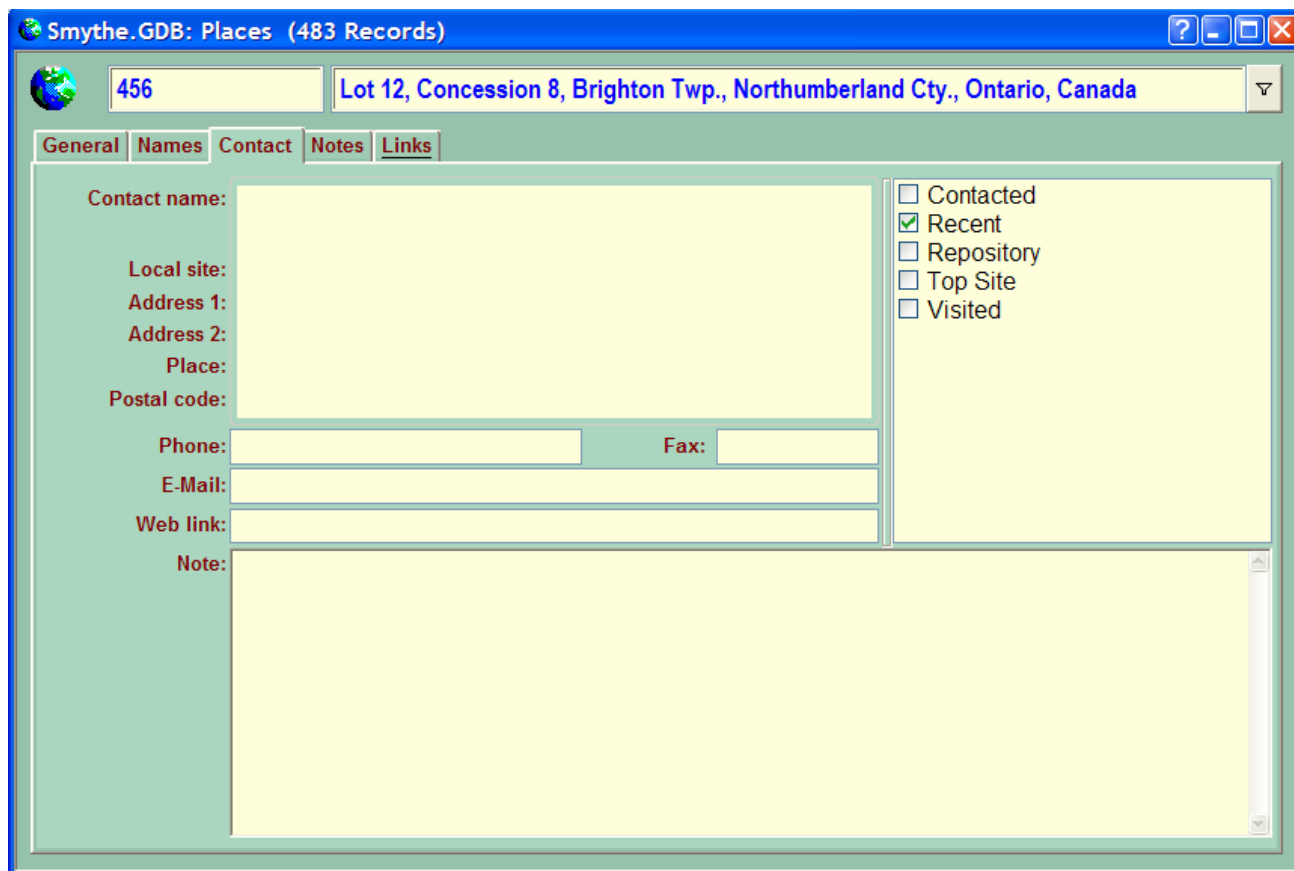
You can make a place name variant a target for further research by clicking on the **Research Target** button. This will open the [Research Targets View](#). When the current place name variant has been linked to a Research Targets record, the **Research Target** button will be shown in bold.

Splitter Bar

There is a vertical **splitter bar** between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

Places View: Contact Page

The **Contact page** contains information on a contact person for the current place. It can be used when the place is a local site, such as an archive, library, court house, or government office. It can also be used for higher levels to store an address of where to write for more information regarding the current place.



The screenshot shows a software window titled "Smythe.GDB: Places (483 Records)". At the top, there is a search bar with the number "456" and a text field containing "Lot 12, Concession 8, Brighton Twp., Northumberland Cty., Ontario, Canada". Below this are tabs for "General", "Names", "Contact", "Notes", and "Links", with "Contact" currently selected. The main area is divided into two columns. The left column contains labels for "Contact name:", "Local site:", "Address 1:", "Address 2:", "Place:", "Postal code:", "Phone:", "E-Mail:", "Web link:", and "Note:", each followed by a corresponding input field. The right column contains a list of checkboxes: "Contacted", "Recent" (which is checked), "Repository", "Top Site", and "Visited".

Contact Name

The **Contact Name** box displays the name that will be used as the first line when formatting addresses.

Local Site

If the address includes a local site, such as a building, enter it in the **Local Site** box. If the current place record is a local site, this field will be initialized with the name of the local site.

Address Boxes

Enter the street address information into the **Address 1** and **Address 2** boxes. **Address 2** can be left blank.

Place Box

Enter the place name in the **Place** box. The default value will be the standard name of the current place.

Postal Code Box

Enter the postal code (ZIP for U.S. addresses) into the **Postal Code** box.

Phone and Fax Boxes

Enter the principle telephone number in the **Phone** box, and the facsimile machine number, if any, in the **Fax** box.

E-Mail Box

Enter the E-mail address into the **E-Mail** box. (E-mail addresses have the "@" character in them.)

Web Link Box

Enter the home page URL associated with this contact, if any, in the **Web Link** box. This is a text string that usually begins with "http://www".

Note Box

The **Note** box provides a place to enter any other type of contact information.

Flags List

The **Flags** list box contains one check box for each defined place flag. If checked, a place "has" the attribute indicated by the name of the check box. The place flags are defined on the [Data Setup View](#). All defined place flags will appear for all places. This makes it easy to see what flag attributes a place does and does not have, and changes can be made with a single click.

Places View: Notes Page

The **Places Notes** page provides a place to enter general notes and research notes about the place.

Smythe.GDB: Places (483 Records)

456 Lot 12, Concession 8, Brighton Twp., Northumberland Cty., Ontario, Canada

General Names Contact **Notes** Links

Place - General Notes: Place - Research Notes:

General Notes

Use the **General Notes** box to enter any comments about the place that are not specific to a particular name variant.

Research Notes

Use the **Research Notes** box to record your research efforts **about** the current place.

Splitter Bar

There is a vertical **splitter bar** between the **General Notes** and **Research Notes** boxes. Drag it to adjust their relative sizes.

The **Place Link** list box contains one row for each data record link to the current place. This list is read-only. It has five columns: [ID](#), [Type](#), [Subtype](#), [Date](#), and [Name](#). Double-clicking on a row will cause a jump to the data record that is represented by that row.

ID Column

The **ID** column displays the ID value of the linked data record.

Type Column

The **Type** column displays the type of data record that is linked: Event, Place, or Source.

Subtype Column

The **Subtype** column displays data related to the linked record:

- For Event records, it displays the Event Type.
- For Place records, it displays the Place Level.
- For Source records, it displays either "Repository" or "Publisher".

Date Column

The **Date** column displays data related to the linked record:

- For Event records, it displays the date of the event.
- For Place records, it displays the date range for the place name.
- For Source records, it displays the publication date.

Name Column

The **Name** column displays data related to the linked record:

- For Event records, it displays the name of the primary individual.
- For Place records, it displays the place name.
- For Source records, it displays the source name.

Citations View

A **source citation** is the link from a data item to a source record. The Citations table stores these links, along with associated data, including support levels, credibility, and rationale. The **Citations View** presents the source citations for each data item. Each data item, or **assertion**, can have multiple source citations. The Citations View presents all the citations to single assertion as a group.

Because citations are links between data items and source records, the **initial** citation for a data item is created by clicking the source citation button next to the data item on its own view. Citations to **additional** sources for a data item can be added on the [Cited Sources page](#).

- **To create the initial citation record for a data item**, go to the view that displays the data item.
- Click on the source citation button next to the data item.
- From the [Source Pick Dialog](#), select the source you want to link to.
- The Citations View will then open and display your new citation record.

[Assertion Page](#)

[Cited Sources Page](#)

[Excerpts Page](#)

[Names Page](#)

[Formatting Page](#)

Citations View: Assertion Page

The **Assertion page** presents the data item and a statement of its surety, which together can be thought of as an **assertion**. It shows a list box containing one row for each source that is cited. By considering the support levels, credibility levels, and rationales shown in the list of cited sources, you can make a determination for the overall **surety level** for the assertion, and then click one of the surety level buttons on this page. The selected surety level will also be shown on the face of the citation button on the data view page that contains the data item.

Smythe.GDB: Citations (116 Records)

1 SMYTHE, Reginald Edward (1780 - 1826): Birth 3 Aug 1780 Little Chesterford, Essex, England

Assertion Cited Sources Excerpts Names Formatting

Type: Event

For: Reginald Edward SMYTHE (1780 - 1826)

Context: Birth 3 Aug 1780 Little Chesterford, Essex, England

Item: (Event occurred)

Researcher: ☐ Recent

Default Researcher

Surety Level:

- ☒ 4: Convincing Evidence
- ☐ 3: Assemblage of Evidence
- ☐ 2: Probable Conclusion
- ☐ 1: Marginal Evidence
- ☐ 0: Undecided

ID	Source ID	Cited Sources	?	U	Rationale
1	2	Smythe Family Records	✓	U	
		Add source			

Type

The **Type** box displays the type of data item. This text is read-only. Possible values include:

- Individual
- Individual Name
- Parents Link
- Father Link
- Mother Link
- Multiple Birth Grouping
- Family Link
- Family - Number of Children
- Event
- Event - Age
- Event - Date
- Event - Place
- Event - Local Site
- Event - Detail
- Event - Individual
- Event - Contact
- Event - Name Variation
- Event - Witness Name
- Event - Witness Role
- Media - Caption

Individual Name Box

For data items involving individuals, the **Individual name** box displays the name of the individual. This text is read-only.

Context Box

The **Context** box provided the background context for the assertion. For event-related assertions, for example, the background context is the event. This text is read-only.

Item Box

The **Item** box displays the data item itself. This text is read-only.

Sources List

The **Sources** list box displays one row for each source citation for the assertion. It contains seven columns: [ID](#), [Source ID](#), [Cited Source](#), [Support Level](#), [Credibility](#), [Rationale](#), and [Exclude Citation](#). The row corresponding to the current citation record will be highlighted.

- **To add another citation for the current assertion**, click where it says "Add Source" and then type the name of the additional source. Click on the Cited Sources tab to enter the citation details.

The sources are shown in the order in which they will appear in a merged footnote. To order the sources, drag the lines into the desired order. Usually, the stronger evidence should be shown first.

For a citation embedded in a note, all citations for the same note will be listed; those that are for a different text range than the current citation will be shown in the **second-layer text style**. Citations that cover the same text range as the current citation will be shown in the normal text style.

ID

The **ID** column contains the ID of the Source Citation record.

Source ID

The **Source ID** column contains the ID of the linked Source record.

Cited Source

The **Cited Source** column contains the source name of the cited source. Double-clicking the name will cause a jump to the appearance of that source on the [Cited Sources page](#). You can add additional sources for the current assertion by typing the name of the new source into the blank line at the bottom of the list, or by double-clicking on the blank to open the Source Pick Dialog.

Support Level

The **Support level** column displays the support level icon for each source citation. Values can be changed by pressing the space bar, or by clicking on the current value and selecting a new value from the drop-down list.

See the description on the [Cited Sources](#) page for help.

Credibility

The **Credibility** column displays the credibility level for each source citation. Values can be changed by pressing the space bar, or by clicking on the current value and selecting a new value from the drop-down list.

See the description on the [Cited Sources](#) page for help.

Rationale

The **Rationale** column displays the rationale text for each source citation. You can edit this text here or on the Cited Sources page. See the description on the [Cited Sources](#) page for help.

Exclude Citation

The **Exclude Citation** column shows a check box for each source citation. An "X" appears in the check box if the citation has been marked for exclusion from reports. Click the check box to mark or unmark a source citation for exclusion on reports. This setting can also be viewed and changed on the [Cited Sources Page](#).

Recent check box

The **Recent** check box will be checked automatically for newly created source citations. You can clear and check this check box as you wish.

Researcher Box

The **Researcher** box displays the name of the researcher who last changed the surety level for the assertion.

Surety Level Selector

The **Surety Level Selector** allows you to select the surety level you wish to assign to the current assertion. For help on surety levels, see the section [Assertion Surety Levels](#) in the chapter [Citing your Sources](#).

The surety levels are represented by icons, as shown below:



- Level 4: Convincing evidence
- Level 3: Assemblage of evidence
- Level 2: Probable conclusion
- Level 1: Marginal evidence
- Level 0: Undecided

Click one of the buttons to set the surety level.

Citations View: Cited Sources Page

The **Cited Sources** page contains the supporting data for the link, such as the support level and credibility level.

Smythe.GDB: Citations (116 Records)

1 SMYTHE, Reginald Edward (1780 - 1826): Birth 3 Aug 1780 Little Chesterford, Essex, England

Assertion Cited Sources Excerpts Names Formatting

Source: Smythe Family Records 1

Where in source: Page 36

Lead text:

☐ Exclude

Researcher: John SMITH

Modified: 30 Dec 1899 0:00:00

Annotation: ☐ Exclude ☐ Exclude Citation

Support Level for Assertion: ✓ Primary & Direct Support (+2)

Credibility: Undecided

Source Name

The **Source Name** box displays the name of the linked source record. You can type the name of the source here. To display the record for the source, double-click this box to jump to the [Sources View](#).

Where in Source

Enter the page number reference, or other locating information, into the **Where in source** box. This information will be used as the [CD] data ("Citation Detail") in the formatting template.

Lead Text

The **Lead text** can be any comments that you want to appear in the citation **before** the formatted part.

Exclude Lead Text check box

When checked, the **Lead Text** will not be included in output reports. This is useful when the lead text is lengthy and the report you are generating doesn't require it, or when you want to use the **Lead Text** box to record your personal thoughts that are not intended for output.

Researcher

The **Researcher** box displays the name of the researcher who last modified this source citation record. This text is read-only.

Modified

The **Modified** box displays the date and time this source citation record was last modified. This text is read-only.

Annotation

The **Annotation** can be any comments that you want to appear in the citation **after** the formatted part.

Exclude Annotation check box

When checked, the **Annotation** will not be included in output reports. This is useful when the annotation is lengthy and the report you are generating doesn't require it, or when you want to use the **Annotation** box to record your personal thoughts that are not intended for output.

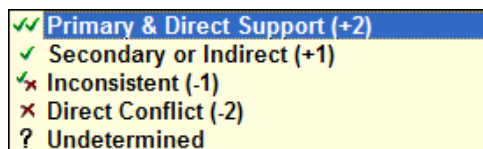
Exclude Citation check box

When checked, the entire citation will not be included in output reports. This is useful when the citation is incomplete, for internal use only, or considered questionable. This setting can also be viewed and edited in the "X" column on the [Assertion Page](#).

Support Level Selector

The **Support level** is your determination of how well the source citation supports the assertion that the data item is correct.

Support levels for the data item are represented by icons, as shown below:

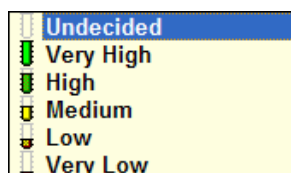


For an explanation of the levels, see the section [Citation Support Levels](#) in the chapter [Citing your Sources](#).

Credibility Level Selector

The **Credibility level** is your decision of how credible this source is regarding the data item being asserted.

The choices from the drop-down list are:




Rationale

The **Rationale** text box appears beneath the Credibility combo box. It can be used to store text that briefly explains why you believe the cited source is relevant to the current assertion. It is for your own personal research purposes, and does not normally appear on output reports. You can store here the reasons why you assigned a low/high support level or low/high credibility, or the facts extracted from the source that you think make your case, or personal reminders of work yet to be performed.

The rationale text appears as a column in the cited sources list on the Assertion page, so that it can be used when assessing the overall surety level for the assertion.

Citation Group Controls

The **Citation group controls** appear in the top right corner of the page. On the Citations View, citations are grouped by data item. On this page, you can use the **Citation group controls** to move between the citations in the current group. The **Citation ID** box displays the unique ID of the current citation record.

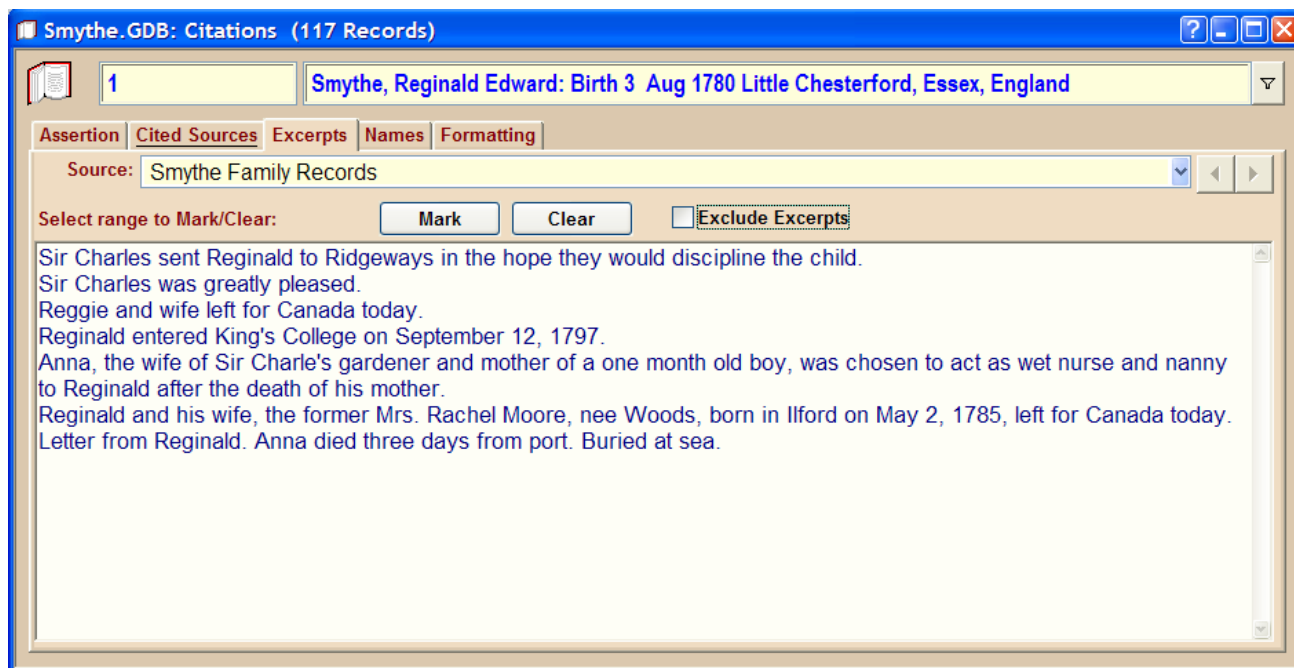
- To move to a different citation record for the current data item, use the **horizontal scrollbar**. If the "thumb" occupies the entire width of the scrollbar, then there are no citation records defined.
- To add an additional source citation for the current data item, click the **New Record in Group** button . Or, on the **Data** menu, click **Add Another Source**. Or, use the keyboard shortcut CTRL+L.
- To delete the current citation record, go to the **Data** menu and click **Delete Citation**.

Citations View: Excerpts Page

The **Excerpts page** allows you to mark the exact text from the linked sources on which you are basing your assertion. This marked excerpt can be included as part of the citation on reports.

The source text itself is not typed here. It is entered on the [Evidence page](#) of the [Sources View](#). Excerpts are stored as a reference into the source text. This has a number of advantages:

- The source text is edited and maintained in one place.
- Duplication of text entry and storage is avoided.
- Corrections to the source text are automatically reflected in all the excerpt references.



Source Selector

Use the **Source selector** box to select the source. The drop-down list will show the names of the source records that are linked to the current data item. This box is read-only. You can also use the left and right arrow buttons to the right of the **Source selector** to step between the source records. If there is only one source record linked to the current data item, these buttons will be disabled.

Double-click on the selected source name to jump to its record on the [Sources View](#).

Source Text

The **Source text** box will display the source text that was entered on the [Evidence page](#) of the [Sources View](#) for the selected source. If the text you want to mark as an excerpt is not shown, double-click on the **Source selector** box to go to the Sources View, where you can enter the text on the Evidence page.

The text currently marked as the excerpt will be shown with the **Marked record** font style, which can be set on the [Preferences View](#).

Mark Button

- To mark a range a text, position the insertion point at the start of the range.
- Press and hold the SHIFT key.
- Position the insertion point at the end of the range, using the arrow keys or the mouse.
- Press the **Mark** button.

Marked text will appear with the **Marked records** font style, which can be set on the [Preferences View](#). You can mark just a few words, several disjoint ranges, or the entire block of text.

Clear Button

To unmark a range of text, select it as described for the [Mark button](#) but this time press the **Clear** button. The highlighting of the text will be removed.

Exclude check box

Click the **Exclude** check box if you do not want the excerpt text to appear as part of the source citation on reports.

Citations View: Names Page

When entering source citations, part of the evidence is recording the names of the individuals exactly as they appear in the source. This information can be entered on the **Names page**.

It is important to record the names exactly as they appear, because this information could be critical to resolving a research problem later. Linking directly to an individual record without recording the name variation will hide the assumptions you have made. This page makes the mapping between source name text and individuals explicit.

Smythe.GDB: Citations (117 Records)

1 Smythe, Reginald Edward: Birth 3 Aug 1780 Little Chesterford, Essex, England

Assertion Cited Sources Excerpts **Names** Formatting

Source: Smythe Family Records

Enter names exactly as they appear in this source:

Individual 1: Reginald Edward Smythe

Name in source:

Individual 2:

Name in source:

Individual 3:

Name in source:

Source Selector

Use the **Source selector** box to select the source. The drop-down list will show the names of the source records that are linked to the current data item. This box is read-only. You can also use the left and right arrow buttons to the right of the **Source selector** to step between the source records. If there is only one source record linked to the current data item, these buttons will be disabled.

Double-click on the selected source name to jump to its record on the [Sources View](#).

Individual Boxes

Use the **Individual** boxes (1, 2, 3) to link to the individual records that you believe correspond to the names mentioned in the source. If your data item involves only one or two individuals, leave the other individual boxes on this page blank.

Name in Source Boxes

Use the **Name in Source** boxes to enter or select the name variations of the individuals that match the names in the source. If the individual you are mapping to does not have a name variation that matches the source, you can type a new name variation for the individual. It will be given an identifier type of **Source name**.

Citation View: Formatting Page

The **Formatting page** displays how the current citation will be formatted on reports. The data can appear in up to three contexts: in the initial (primary) citation, in secondary citations, and in the bibliography.

Note: The formatting information is actually stored with the linked Source record, and is normally viewed and modified on the [Sources View Formatting Page](#). The formatting is also presented here on the Citations View as an added convenience. **Any changes made to the templates will affect all citations to the same source.**

The default formatting is controlled by the linked Source Template record, which is defined on the [Source Types View](#). The selection of Source Template Record is done by the **Source Type** box on the [Sources View General Page](#). You can also override the default formatting by simply editing the text on this page.



The screenshot shows a software window titled "Smythe.GDB: Citations (117 Records)". At the top, a search bar contains "1" and a text field displays "Smythe, Reginald Edward: Birth 3 Aug 1780 Little Chesterford, Essex, England". Below this are tabs for "Assertion", "Cited Sources", "Excerpts", "Names", and "Formatting", with "Formatting" currently selected. The main area is divided into three sections: "Primary Citation:", "Secondary Citation:", and "Bibliography:". Each section has a "Default" button, a "User edit" radio button (which is unselected), and a "Toggle Codes" button. The text for each citation type is as follows:

- Primary Citation:** Clarence Alexander Smythe II, *Smythe Family Records* (no place: The Strand, London, England: Vanity Publishers, no date), Page 36; Call number 93 V32 nm, Saffron Walden Public Library, Saffron Walden, Essex, England. Condition, fair. This is a limited edition book. Only known copy is in the Saffron Walden Library.
- Secondary Citation:** Smythe, *Smythe Family Records*, Page 36.
- Bibliography:** Smythe, Clarence Alexander, II. *Smythe Family Records*. No place: The Strand, London, England: Vanity Publishers, no date.

Primary Citation

The **Primary citation** box displays how the current citation would be formatted as the initial reference to the source. This is usually the most complete citation format.

Unlike on the [Sources View Formatting Page](#), all template codes are translated, including the citation-specific codes.

Secondary Citation

The **Secondary citation** box displays how the current citation would be formatted as a secondary reference to the source. A source that is referenced only once on a report will never use this formatting. In general, the secondary citation formats are briefer than the initial citation formats. Some elements are left out, and some elements are shortened.

Bibliography

The **Bibliography** box displays how the current source will be formatted for inclusion on the bibliography section of a report. In this context, the source is presented in a general way, with fewer of the specific details. Often, there are no citation-specific data values shown in this format.

User Edit

There are three **User edit** controls, one next to each template box. These are automatically set when you edit the corresponding template manually. When a template is marked "user edit", Genbox will **not** update the formatting, even when the data of the source record is updated.

Default Buttons

If you have manually edited the formatted text and want to return to the default formatting, press the corresponding **Default** button.

Sources View

The **Sources View** presents information on source records. Each source document in your database will have a record in the Sources Table. Source records are part of the **source citation system**, which is explained in the chapter [Citing your Sources](#).

Source data is organized onto multiple pages. The [General page](#) displays most of the information for locating a source record. The [Settings page](#) contains additional data items. The [Evidence page](#) can store a copy of actual text from the source. The [Content page](#) can be used to catalog the contents of a source which holds multiple data items. The [Formatting page](#) can show you how the source information will be formatted on reports.

To select a source record, type either the ID or name of the source in the key boxes in the header section of the view. Or, use the arrow buttons on the main toolbar to step through the records.

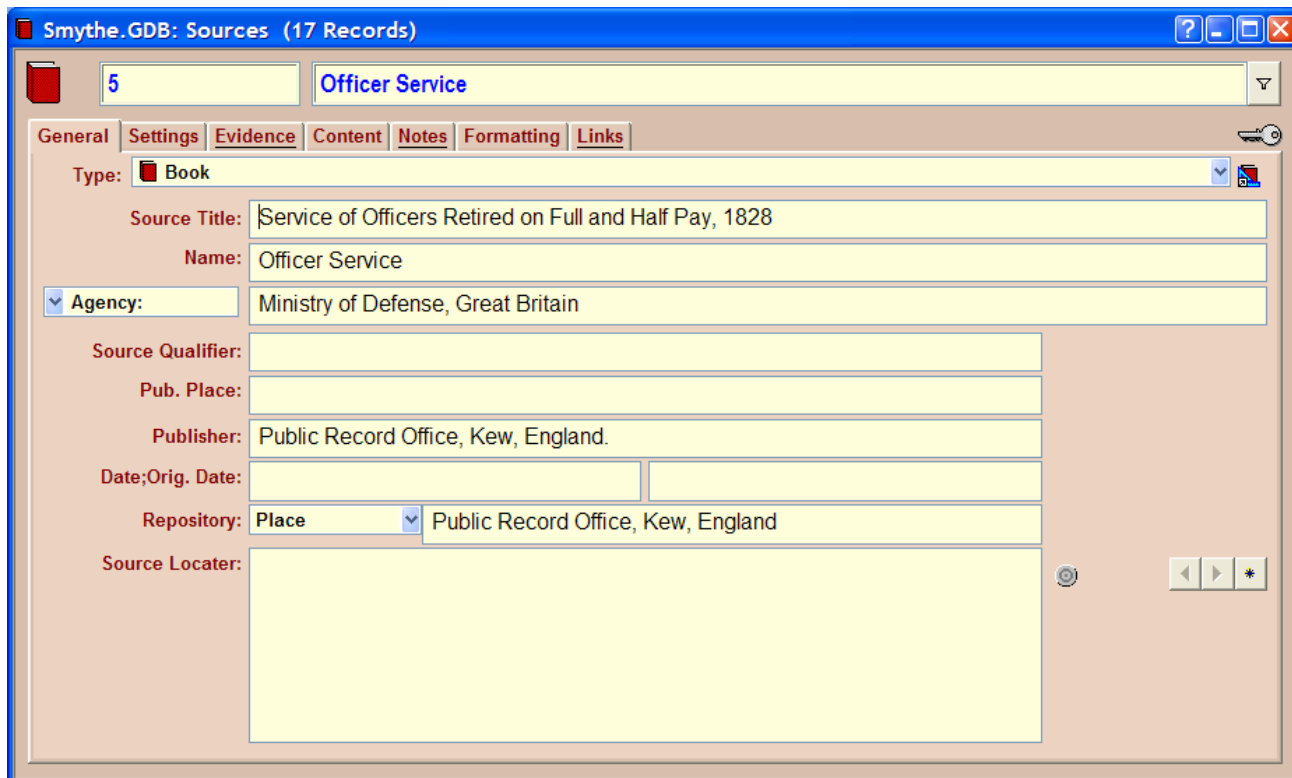
[General Page](#)
[Settings Page](#)
[Evidence Page](#)
[Content Page](#)
[Notes Page](#)
[Formatting Page](#)
[Links Page](#)

Source records should contain all of the information another researcher would need to both evaluate the validity of the data and also locate the original records himself should he care to do so. Information that describes your particular copy of a source can be entered into a Multimedia record on the [Media View](#).

Sources View: General Page

The **Sources General page** displays most of the information for locating source records. It also provides for display of multimedia linked to a source record.

Note The labels for the text boxes on this page can change. The labels are controlled by the Source Template record, which is selected with the **Source Type** drop-down list box.



The screenshot shows a software window titled "Smythe.GDB: Sources (17 Records)". Inside, there's a tabbed interface with "General" selected. A search bar at the top shows "5" and "Officer Service". Below the tabs, the "Type" is set to "Book". The form fields are as follows:




- Source Title:** Service of Officers Retired on Full and Half Pay, 1828
- Name:** Officer Service
- Agency:** Ministry of Defense, Great Britain
- Source Qualifier:** (empty)
- Pub. Place:** (empty)
- Publisher:** Public Record Office, Kew, England.
- Date;Orig. Date:** (empty)
- Repository:** Place (dropdown) Public Record Office, Kew, England
- Source Locator:** (empty)

Source Type Box

The **Source Type** box presents a drop-down list of the available source types. Each new Genbox database is initialized with over 100 source types for common source record types, such as birth, marriage, and death certificates, register entries, books, journals, censuses, National Archive items, letters, and wills. The source templates can be modified and new source templates can be created on the [Source Types View](#).

Genbox will assign an initial source type to each new source record. If its selection is incorrect, choose the correct source type from the drop-down list as early as possible. The choice of source type affects the data entry on this page. Source types can be defined with default values for some of the data fields.

The **Source Type** box displays an icon to the left of the name. This icon indicates the **source level**, which is also set by the choice of source type:

-  Document Level
-  Document-in-Source Level
-  Source Level

The icons are intended to suggest, respectively: a loose paper sheet; a single page within a book; a book. This reflects the underlying data structure: A Document Level source record does not link to a higher source. Instead, a repository link can be specified. The Document-in-Source Level source record does link to a higher source record. The Source Level source record also does not link to a higher source record, but does have a link to a repository.

Source Template Link Button

Click the **Source Template Link** button to view the active source template in the [Source Types View](#). You can make changes to the default templates there, which will affect all linked source records.

Title Box

The **Title** box displays the descriptive name of the source. This is the most important data entry item.

Name Box

The **Name** box displays the name for the source record, used only inside Genbox. This is the name that will appear when the source record is referenced, so the name should be distinct from among all your source records.

Genbox can automatically generate the source names, based off of the source type, source title, and other fields. The source type record has a special template for this purpose, on the [Notes page](#) of the Source Types View. For this reason, it is a good practice to enter data into the other boxes on this page first, to allow this feature to work. You may notice the **Source Name** box (and also the **Name Key** box in the header section) automatically update as you type into text boxes that are referenced on its name template.

You can also edit the **Name** box yourself, to give the source a name that may be more meaningful to you. The automatic name generation will be disabled whenever the contents of the name box do not match what the automatic generation would have produced.

Author Type Box

Often, the "author" of a source document is somebody other than a true author. This information is important to include when formatting a source citation. The **Author Type** box contains a drop-down list for author type. The choices are:

Author:
Agency:
Abstractor:
Artist:
Compiler:
Editor:
Photographer:
Transcriber:
Translator:

When **Author** or **Agency** is selected as author type, Genbox will omit the type from the formatting. The other types will be included.

Use **Agency** when the author name is not a person. This affects how the author name is formatted.

Author Box

The **Author** box displays the name of the author of the source. Enter the name in normal word order, which is usually given name, middle name, surname. If the surname is not the last word, you may mark it with /slash marks/. Multiple authors may also be entered. Separate each name with a comma.

Note Because source document authors will rarely be of genealogical interest, this field is not linked to the Individuals Table.

Qualifier Box

In the **Qualifier** field, enter any information about the source that qualifies it or restricts it in some way. Often, the source template will have a specific use defined for this data item, suggested by its label.

Place Box

The **Place** box is used to enter place information for the source. For a Source Level source, the label is typically "Pub. Place" and the field stores the place of publication. For a Document Level source, the place can be the place where the document was created. This field is a link to the Places table.

Subject / Publisher Box

For Source Level sources, this box is used to enter the name of the publisher. For Document Level sources, this box is used to enter the name of the subject.

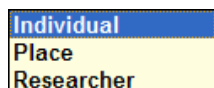
Date Boxes

There are two date boxes, commonly labeled "Date" and "Original Date". The first date box is used when only one date is associated with the document. If the current source document is a published work that has been reprinted, the second date box is used to enter the original publication date. If there are two dates associated with a document, such as a will that was signed on one date and probated on a later date, the earlier date should be placed in the second date box.

Dates can be entered as just years, if suitable for the type of source record.

Repository Type Box

For Document Level and Source Level sources, the **Repository Type** box presents a drop-down list of the following choices for type of repository:



The default type is **Place**. In Genbox, "repository" is considered an attribute, rather than a separate data type. Most often, it is a place that serves as a repository for the source document. Sometimes it is an individual or researcher that personally holds the document. Rather than creating a "place" record of the form "holdings of John Smith" to store this relationship, Genbox allows you to link directly to the Individual's record. Their contact information is then available as the repository address.

Repository Box

For Document Level and Source Level sources, the **Repository** box is used to enter the name of the repository where the document is stored. This can be an individual, researcher, or place name, as determined by the [Repository Type box](#).

Higher Source Box

For Document-in-Source Level sources, the **Higher Source** box is used to enter the name of the higher source record.

Note The higher source should be a Source Level source.

Locator Box

The **Locator** box is used to enter the "where to find it" information, in either the higher source or the repository. It may contain a call number, a page reference, or some other referential value.

Media Control

The **Media** control is the open area to the right of the lower boxes. It initially displays the first picture that is linked to the source, if any. Any number of multimedia objects can be linked to each source. You may find it helpful to scan your source documents, create a media record for each image file, then add a link to each corresponding source record.

Multimedia can also be linked to individuals, families, events, and places. See the chapter [Adding Multimedia](#) for help on the **Media** control.

Research Notes and Target Button

Use the **Research Notes** box to record your research efforts regarding the current source.

You can make the current source a target for further research by clicking on the **Research Target** button. This will open the [Research Targets View](#). When the current source has been linked to a Research Targets record, the **Research Target** button will be shown in bold.

Key / Padlock Buttons

The **Key** and **Padlock** buttons that appear to the right of the tabs are used for **Source Lock Mode**. Source lock mode makes it easy to add source citations when you enter data. See the [Source Lock Mode](#) section in the chapter [Citing your Sources](#) for help.

Sources View: Settings Page

The **Settings** page contains additional text boxes for entry of source data items.

Smythe.GDB: Sources (17 Records)

5 Officer Service

General Settings Evidence Content Notes Formatting Links

Media type: Officer Service

Short title: Officer Service

Ext. Storage:

☐ Recent 25 Mar 2005 17:49:40

☐ Exclude

Media Type

The **Media type** box provides a place to indicate the physical form of the source. It displays several choices on its drop-down list:

Atlas/map
Book/printed text
Computer file/electronic
Manuscript
Microform
Object/artifact
Photo/pictorial work
Sound recording
Tombstone/site marker
Unknown/other
Video/motion picture

It is intended that the **current form** of the source be recorded. For example, a manuscript that has been recorded on microfilm or microfiche should have a **Media type** of "Microform", not "Manuscript".

Short Title

The **Short title** box is for entry of a shortened form of the **Source title**. The shortened title will be used on reports when a source is referenced a second time. If no value is entered, Genbox will construct a short title.

External Storage

The **External Storage** text box is for entry of your own filing system code for the documents that you actually possess. It can be a file number or room location.

Recent check box

The **Recent** check box is checked automatically for new source records created during an import operation. You can clear it and check it as you prefer.

Exclude check box

When the **Exclude** check box is checked, all citations to this source will be excluded on charts and reports. This is an easy way to suppress citations to sources that you have decided are questionable or want to research further before using.

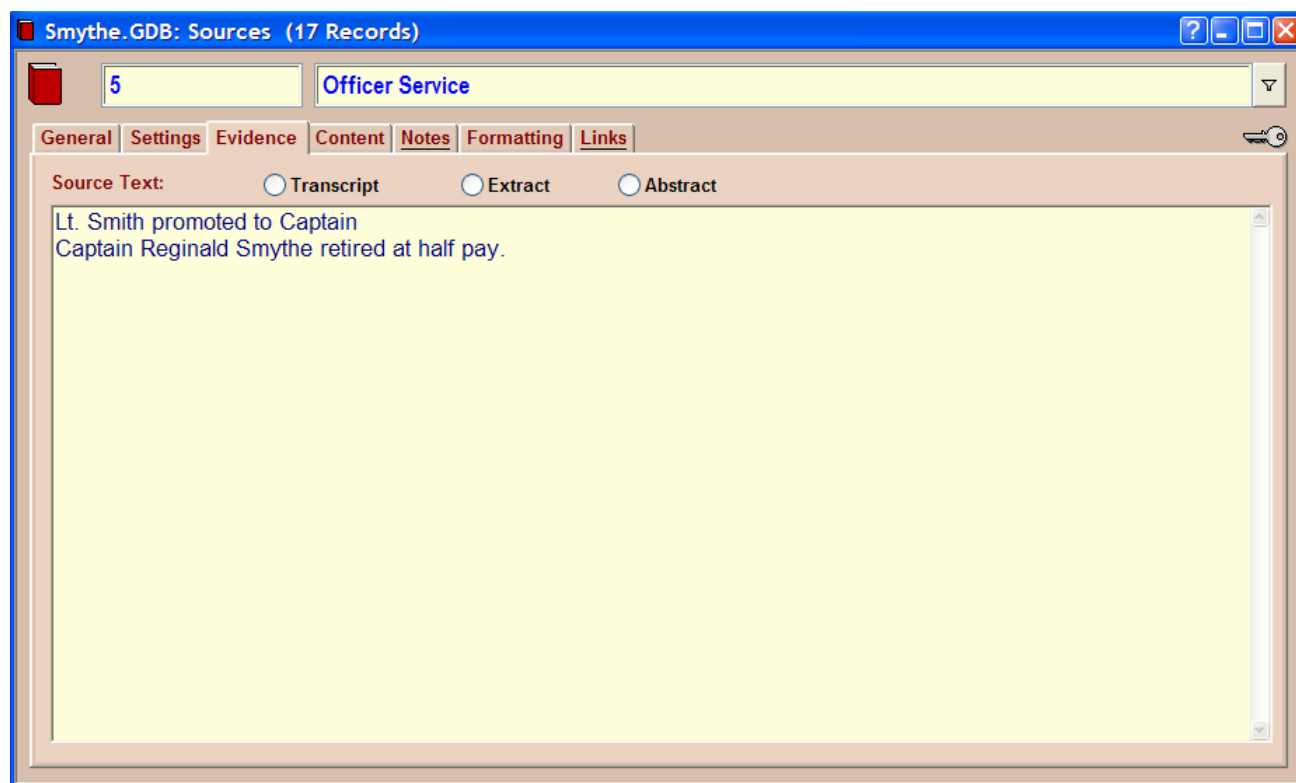
Change Date

The **Change date** box displays the last date this source record was modified. This text is read-only.

Sources View: Evidence Page

The **Evidence page** is where actual text from the source can be entered. Making a transcript of the source, or at least an excerpt of the relevant parts, has several advantages:

- It will preserve the information in your database, making it less likely to be misplaced or lost.
- If you export your data for use by others, the evidence can go with the data.
- You can easily print it out to make paper copies.
- You can use "Find..." to search the text.
- You can automatically include it in your printed reports.
- You can keep it visible in a window while you enter data based on it.



Source Text Type

The **Source Text Type** radio button allows you to specify the type of source text entered:

- Transcript
- Extract
- Abstract

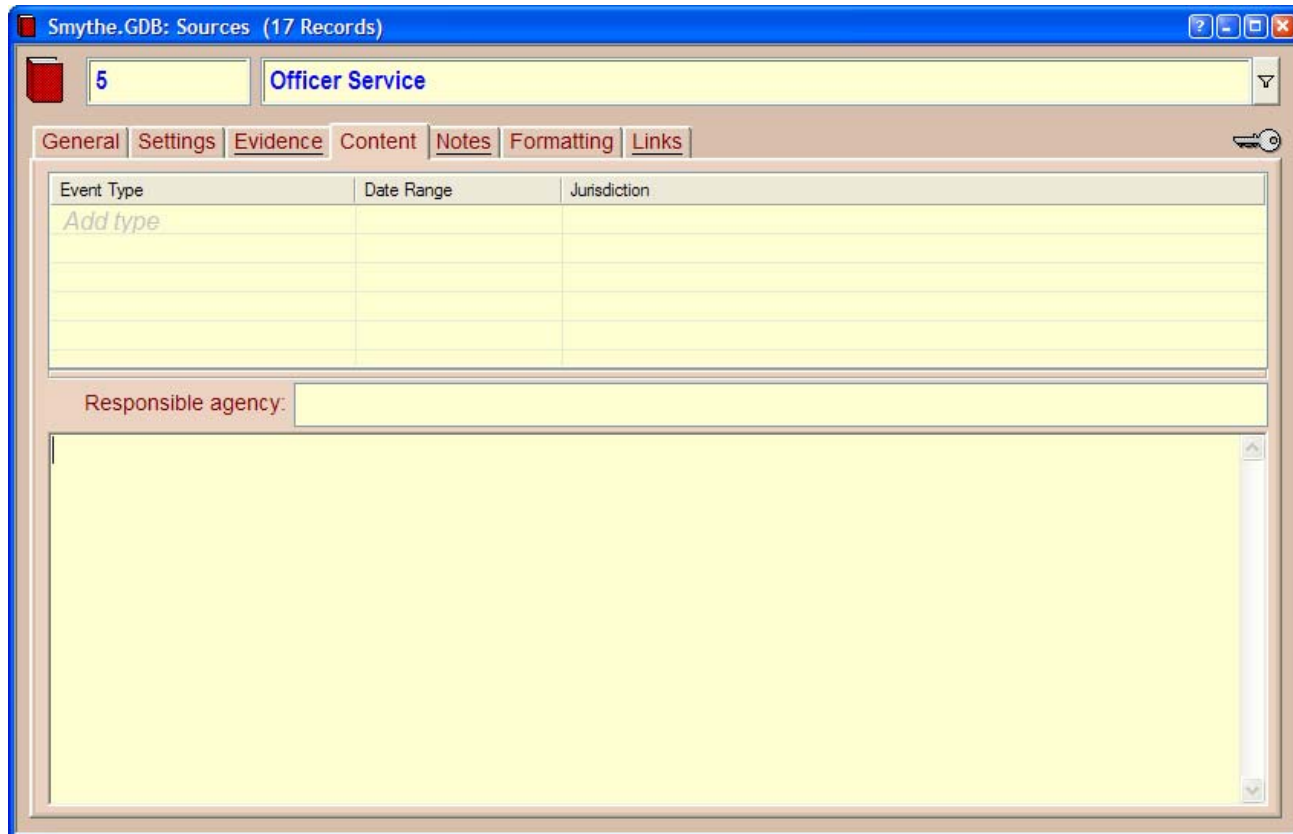
A **transcript** is a faithful recording of the entire contents of the source. An **excerpt** is like a transcript, except that only a part of the source has been entered. An **abstract** is a summary of the source. It is not a word-for-word recording.

Source Text

The **Source Text** box is where you enter the source text. You can use the style toolbar buttons (bold, italic, underline) to make your entry more closely match the original. Line breaks are optional; if entered, they will affect the way the source text appears on output reports, which may not be desirable.

Sources View: Content Page

The **Content page** provides a place to enter content information for a source. You can record the event types, date ranges, and jurisdictions (places) of the data which a source, such as a register, contains. This information would be helpful to have if you later do research that leads you to the same source. By recording at least this outline of its contents, you will know whether the information you are seeking is likely to be included before you start.



The screenshot shows a software window titled "Smythe.GDB: Sources (17 Records)". Inside, there's a tabbed interface with tabs for General, Settings, Evidence, Content, Notes, Formatting, and Links. The "Content" tab is active. At the top, there's a source identifier "5" and the source name "Officer Service". Below the tabs, there's a table with three columns: "Event Type", "Date Range", and "Jurisdiction". The first row of the table has a placeholder text "Add type". Below the table, there's a field labeled "Responsible agency:" followed by a large text area for notes.

Event Type	Date Range	Jurisdiction
Add type		

Responsible agency:

Content List

The **Content List** contains one row for each content record. It has three columns: [Event Type](#), [Date Range](#), and [Jurisdiction](#).

Event Type

Enter the **Event Type**, such as Birth, Death, Marriage.

Date Range

Enter the **Date Range**, which can be a range of years, of months, or between two specific dates.

Jurisdiction

Enter the **Jurisdiction**, which may be a state, a county, or some other division.

Responsible Agency

The **Responsible agency** box is for entry of the agency that is responsible for this source.

Notes

The **Notes** box provides a place to enter any general notes about the contents of the source. Sometimes it is easier to describe a source this way than by entering records in the Content List.

Sources View: Notes Page

The **Notes page** contains text boxes for entry of notes regarding the source.

Smythe.GDB: Sources (17 Records)

5 Officer Service

General Settings Evidence Content **Notes** Formatting Links

Source - General Notes: Source - Research Notes:

Records are not indexed. Use of a professional researcher is required.

General Notes

Use the **General Notes** box to enter any comments about the source.

Note The actual text from the source should be entered on the [Evidence page](#).

Research Notes

Use the **Research Notes** box to record your research efforts regarding the current source.

Sources View: Formatting Page

The **Formatting page** displays how the current source will be formatted on reports. The data can appear in up to three contexts: in the initial (primary) citation, in secondary citations, and in the bibliography.

The default formatting is controlled by the linked Source Template record, which is defined on the [Source Types View](#). The selection of Source Template Record is done by the **Source Type** box on the [General Page](#). You can also override the default formatting by simply editing the text on this page.

Note: the formatting for a source can also be viewed and modified on the [Citations View Formatting Page](#), from any citation that is linked to the source. Any changes to the formatting made there will actually be stored with the Source record, and will also be reflected on this page when viewed.

The screenshot shows a software window titled "Smythe.GDB: Sources (17 Records)". Inside, a tabbed interface has the "Formatting" tab selected. The source number "5" and name "Officer Service" are at the top. The left sidebar contains three sections: "Primary Citation:", "Secondary Citation:", and "Bibliography:". Each section has a "Default" button and a "User edit" radio button. The "Primary Citation:" section also has a "Toggle Codes" button. The main text area displays the formatted text for each context. The Primary Citation text is: `<[LEAD TEXT]><[EXCERPT]>Ministry of Defense, Great Britain, Service of Officers Retired on Full and Half Pay, 1828 (no place: Public Record Office, Kew, England., no date)<, [CD]>, Public Record Office, Kew, England. Records are not indexed. Use of a professional researcher is required.< [ANNOTATION]>.` The Secondary Citation text is: `<[LEAD TEXT]><[EXCERPT]>Ministry of Defense, Great Britain, Service of Officers Retired on Full and Half Pay, 1828<, [CD]>.< [ANNOTATION]>.` The Bibliography text is: `Ministry of Defense, Great Britain. Service of Officers Retired on Full and Half Pay, 1828. No place: Public Record Office, Kew, England., no date.`

Primary Citation

The **Primary citation** box displays how the current source will be formatted for its initial citation. This is usually the most complete citation format.

You will likely see a code that looks like "<, [CD]>" in your formatted text. This is a place marker for the citation detail data. This code won't be translated into formatted text until the time of report generation. This allows the detail from each citation to be included in the formatting. If you manually edit the formatting, be sure to leave this code in to continue to support this feature.

If you wish to see the formatting with the [CD] code and other citation-specific template codes translated, open the Citations View and go to a citation record that links to the source. On the [Citations View Formatting Page](#), the complete formatting, including the citation-specific detail, can be viewed.

Secondary Citation

The **Secondary citation** box displays how the current source will be formatted for secondary citations. A source that is referenced only once on a report will never use this formatting. In general, the secondary citations are briefer than the initial citations. Some elements are left out, and some elements are shortened.

Bibliography

The **Bibliography** box displays how the current source will be formatted for inclusion on the bibliography section of a report. In this context, the source is presented in a general way, with fewer of the specific details, such as page numbers. For some Document-in-Source Level sources, virtually nothing from the lower source is included; only elements from the higher source are considered appropriate.

User Edit

There are three **User edit** controls, one next to each template box. These are automatically set when you edit the corresponding template manually. When a template is marked "user edit", Genbox will not update the formatting, even when the data of the source record is updated.

Default Buttons

If you have manually edited the formatted text and want to return to the default formatting, press the corresponding **Default** button.

- For Source records, it displays the Source Type.

Name Column

The **Name** column displays data related to the linked record:

- For Citation records, it displays the name of the primary individual.
- For Source records, it displays the source name.

Media View

Adding multimedia to your genealogy can make it more appealing. A picture of an ancestor can reveal much more than just the name and vital events can. A video clip of an interview with a relative or of a special family event can be enjoyed over and over.

First, you will need to use a scanner, a digitizer, or other tools to create electronic images and video clips.

Multimedia files are not stored in your Genbox database. They remain as separate files, and can reside anywhere on your hard disk. In your Genbox database, Multimedia records store the **filename**, including the full or relative path, of each of your multimedia files. This approach has several advantages:

- The creation, editing, and maintenance of multimedia files can take place outside of and independent of Genbox.
- Several multimedia records can point to the same filename. This is useful when a picture of several people is to be linked to several individual records, each with a different caption, title, or other data.
- The same multimedia file can be referenced by multiple Genbox databases.
- The size of the Genbox database file is reduced.

The **Media View** presents information on multimedia records.

[General Page](#)

[Content Page](#)

[Clip Page](#)

[Links Page](#)

Adding Multimedia Records

With the Media View active, click the **New Record** button on the main toolbar to add a new media record. The File Open Dialog will appear, where you can browse for or type the path and filename of your multimedia file. When you return to the Media View, a new record will already be added.

Reading of Embedded IPTC Data

IPTC data embedded in JPEG or TIFF files added to the database will be used to initialize fields for the new media records:

- "Headline" (or "Object Name" if Headline is empty) initializes the Title field.
- "Caption" initializes the Caption field.
- "Date Created" initializes the Creation Date field.
- "Special Instructions" initializes the Description field.

The default reference name will be the Title if it is not blank; otherwise it will be the filename without the extension.

Refreshing Fields from IPTC Data


If the IPTC data has been changed on a media file outside of Genbox, the Title, Caption, Creation Date, and Description fields can be updated to match the new text values embedded in the media file. To do this, click the "Open..." button to the right of the filename on the Media View. Select the filename again. When the Open File dialog closes, the fields will be updated with the new values, if any.

Media View: General Page

The **General page** data describes the physical makeup of the multimedia object, and also contains the title and caption. The description of the actual content of the multimedia is entered on the [Content page](#).

The screenshot shows a software window titled "Smythe.GDB: Media (6 Records)". Inside, there's a tabbed interface with "General", "Content", "Clip", and "Links" tabs. The "General" tab is active. It contains several input fields and a preview image. The "File name" field is set to "C:\Family History\Family Photos\Barbara King Photos\Emma Nunn.jpg". The "Reference name" field is set to "Emma Nunn". The "Media type" is set to "Image" (with a camera icon), and the "Format" is set to "JPG". The "Pref. size" is "0 (in)" and the "Quality" is set to a default value. The "Bitmap size" is "276 x 408" and the "Ext. storage" field is empty. A preview of a black and white portrait of a woman is shown on the right. At the bottom, there are fields for "Title" and "Caption".

Filename

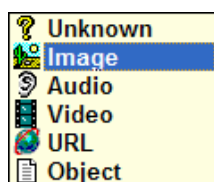
Enter the full filename and path to the multimedia file in the **Filename** box. Or, to browse for the file, click on the **Open File** button. 

Reference Name

The **Reference name** is the name by which this multimedia record is known within Genbox. Give the record a descriptive name that will suggest what the corresponding multimedia file shows.

Media Type

Each multimedia record is categorized as a particular type. The **Media types** are represented by icons, as shown on the drop-down list:



An Object can be for example, a document or a spreadsheet.

Format

The **Format** box displays the format type of the linked multimedia file. For image files, it might display "BMP", "GIF" or "JPG". This text is read-only.

Pref. Size

The **Pref. size (Preferred size)** box is for entry of the preferred (maximum) horizontal and vertical size, in inches, on charts and reports. This lets the picture have control over its presentation. This value can be left blank to allow the charts and reports to control the sizing. The value entered will set the larger dimension size, and the aspect ratio of the picture will be maintained to set the other dimension.

Quality

The **Quality** box presents a place to enter a short description of the physical quality of the multimedia. You can type in a value or choose from the drop-down list:

Poor
Fair
Good
Excellent

Bitmap Size

The **Bitmap size** box displays the dimensions of image files, as the number of horizontal pixels and vertical pixels.

Modified

The **Modified** box displays the date and time the media record was last changed. This text is read-only.

External Storage

The **External storage** box provides a place to enter the storage location of the physical multimedia object itself, not its electronic copy. For your pictures, this could be the label on a shoebox, or a file cabinet drawer, or a page reference in a book.

Title

The **Title** box is for entry of a title for the multimedia object. The title can be displayed on charts and reports.

Caption

The **Caption** box is for entry of a caption for the multimedia object. Unlike the title, the caption is usually a sentence or two that explains the picture or its relevance. The caption can be displayed on charts and reports.

Media Control

The **Media control** is the open area to the right of the middle boxes. It provides a preview of the linked multimedia object. The **Play** button, which appears to the left of the **Media control**, can be used to open image files in a larger view, or to hear audio files, or to start video clips.

Media View: Content Page

The **Content page** is for entry of information that describes the content of the multimedia. This information can be helpful when you are maintaining a large library of multimedia, and you want to search for a particular record by its content.

The screenshot shows a software window titled "Smythe.GDB: Media (6 Records)". Inside, there's a tabbed interface with "General", "Content", "Clip", and "Links" tabs. The "Content" tab is active. At the top, there's a search bar with the number "5" and the name "Emma Nunn". Below this, there are two dropdown menus: "Subject" set to "Individual" and "Setting" set to "Personal/Family". A "Created:" field shows "(0 A.D.)" with a small icon to its right. A large list of checkboxes is displayed, organized in two columns. The first column includes: Adults, Artistic, Babies, Children, Dialogue, Favorite, Music. The second column includes: Narrative, Outside, Portrait, Posed, Recent, Seniors, Song. To the right of the checkboxes is a small thumbnail image of a woman, Emma Nunn. At the bottom, there's a "Description:" label followed by a large, empty text area for entering details.

Subject

The **Subject** box provides the following choices on its drop-down list:

- Individual
- Couple
- Group
- Animal
- Nature
- Object
- Structure
- Document
- Activity
- Other

Choose the most appropriate selection for the content.

Setting

The **Setting** box provides the following choices on its drop-down list:

Personal/Family
Social Occasion
Instructional
Occupational
Recreational
Travel/Vacation
Other

Choose the most appropriate selection for the content.

Created

Enter the date this multimedia object was created in the **Created** box.

Media Flags

The **Media Flags** box contains one check box for each defined media flag. If checked, a multimedia object "has" the attribute indicated by the name of the check box. The media flags are defined on the [Data Setup View](#). All defined media flags will appear for all multimedia records. This makes it easy to see what flag attributes a multimedia object does and does not have, and changes can be made with a single click.

Description

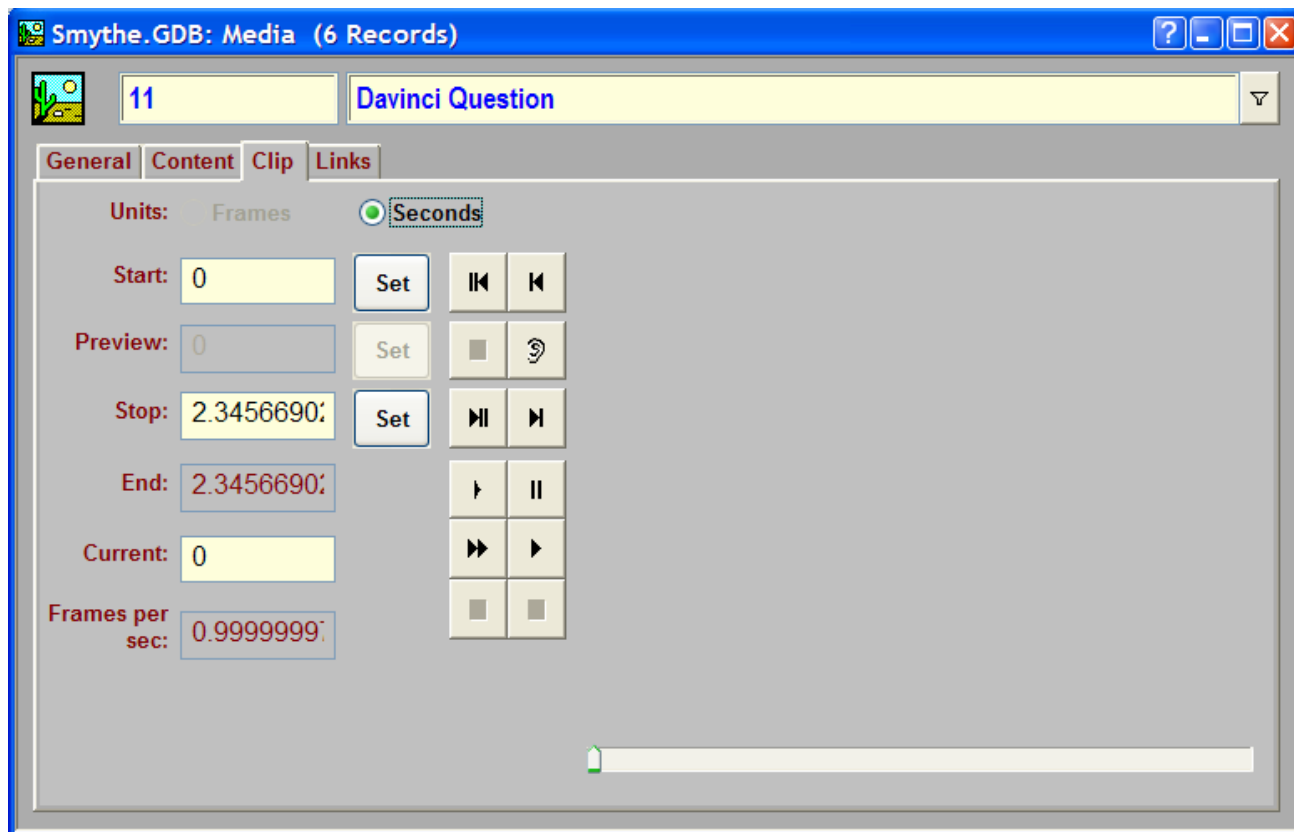
Use the **Description** box to enter a general description of the contents of the multimedia object.

Media Control

The **Media control** is the open area to the right of the top half of the page. It provides a preview of the linked multimedia object. The **Play** button, which appears to the left of the **Media control**, can be used to open image files in a larger view, or to hear audio files, or to start video clips. You can review the multimedia while you are entering its content description.

Media View: Clip Page

Genbox supports AVI, MPEG, Quicktime (QT or MOV), and Windows Media (WMV) format video files, and AU, AIFF, MIDI, MP3, and WAV format audio files. The **Clip page** allows you to specify a portion, or **clip**, of a video or audio file that you want to treat as a named piece that can be linked to data records. Only the selected clip will be visible or audible when it is linked to a data record. In addition, you can define a single frame within a video clip to be the still image representation that shows in the media control when the video is not playing, and also when the media is selected for inclusion on printed reports.



Units

The **Units** can be set to **frames** or **seconds**. This selection affects the display of values in the text boxes on this page.

Start Box

The **Start** box displays the starting position for the clip. You can type in a new value, or press the **Set** button to use the current position of the multimedia.

Preview Box

The **Preview** box displays the preview position for the video clip. You can type in a new value, or press the **Set** button to use the current position of the video. The preview position indicates the video frame to be shown when the video is not playing. For audio files, the preview controls are disabled.

Stop Box

The **Stop** box displays the stopping position for the clip. You can type in a new value, or press the **Set** button to use the current position of the multimedia.

End Box

The **End** box displays the actual length of the multimedia. This value is read-only.

Current Box

The **Current** box displays the current position of the multimedia. Typing a value and pressing ENTER will update the current position.

Frames Per Second Box

The **Frames per second** box displays the frame rate defined in the multimedia file. This value is read-only.


Set Buttons

There is a **Set** button next to the **Start**, **Preview**, and **Stop** text boxes. Pressing a **Set** button will update the value in the corresponding text box to the current position.

Media Controls




Start Clip Position

Click the **Start Clip Position**  button to move to the starting position for the clip.


Start Position

Click the **Start Position** button  to move to the very start of the clip.

Preview Position

Click the **Preview Position** button  to move to the preview position. The preview position determines the frame that will be shown with the video is not playing. The preview position can be at any position in the multimedia, even if it is outside the clip start and stop range.


Play

Click the **Play** button  to test out the clip. The clip will start playing at the **Start Clip Position** and stop at the **Stop Clip Position**.


Stop Clip Position

Click the **Stop Clip Position** button  to move to the stopping position for the clip.


Stop Position

Click the **Stop Position** button  to move to the very end of the multimedia.


Slow Forward

Click the **Slow Forward** button  to play the multimedia at a rate half as fast as normal, beginning at the current position.

Pause

Click the **Pause** button  to stop the multimedia at its current position. Click the **Forward** button to resume.


Fast Forward

Click the **Fast Forward** button  to play the multimedia at a rate twice as fast as normal, beginning at the current position.


Forward

Click the **Forward** button  to play the multimedia normally, beginning at the current position.

Step Back

Click the **Step Back** button  to move to the previous frame. This is enabled for videos only.

Step Forward

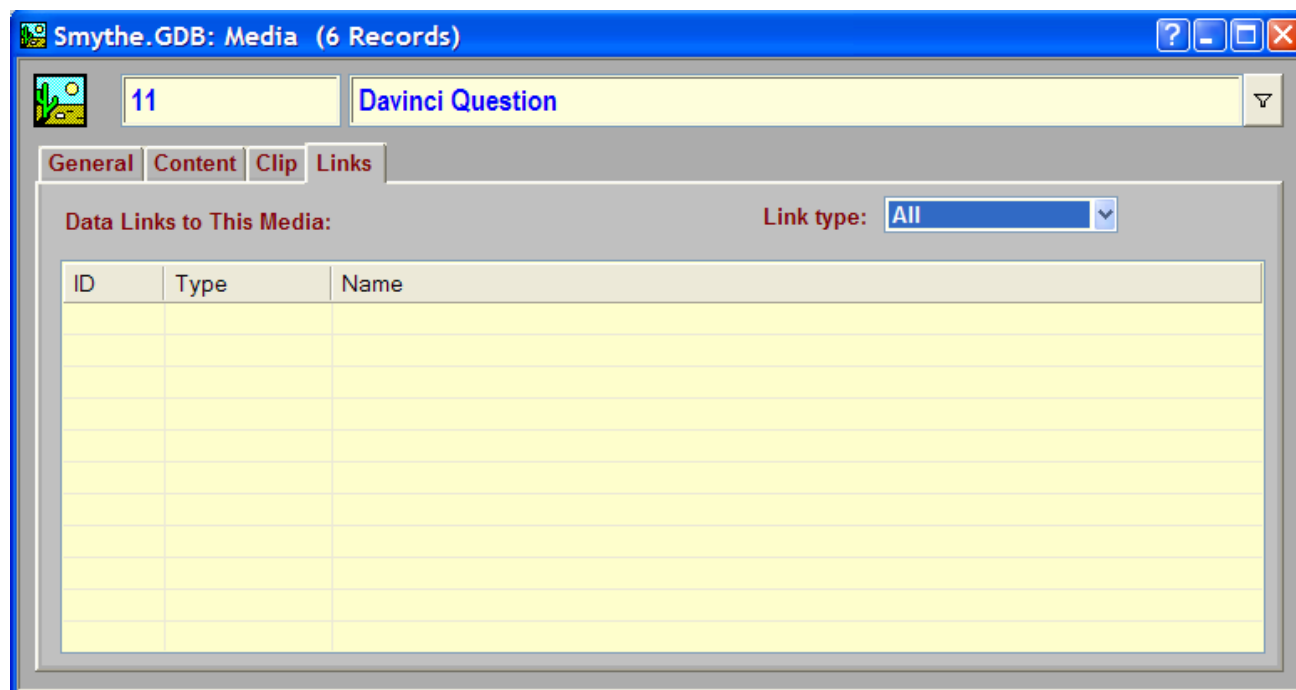
Click the **Step Forward** button  to advance to the next frame. This is enabled for videos only.

Slider Control

The **Slider Control** beneath the **Media Control** is used to display the progress of the multimedia and also to move the current position to anywhere in the range by dragging the thumb of the slider.

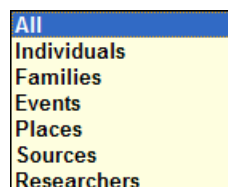
Media View: Links Page

The **Links page** contains a list box that displays one row for each data item linked to the current multimedia record. A double-click on any row will cause a jump to the view and page where the multimedia record is being referenced.



Link Type Selector

The **Link Type Selector** box allows you to filter the list to display only links from a particular type of data record. Choices on the drop-down list are:



Media Link List

The **Media Link** list box contains one row for each data record link to the current multimedia record. This list is read-only. It has three columns: [ID](#), [Type](#), and [Name](#). Double-clicking on a row will cause a jump to the data record that is represented by that row.

ID Column

The **ID** column displays the ID value of the linked data record.

Type Column

The **Type** column displays the type of data record that is linked: Individual, Family, Event, Place, or Source, or Researcher.

Name Column

The **Name** column displays the name of the linked data record.

Researchers View

As part of the research subsystem, the **Researchers View** displays information on the researchers of the current genealogy database. Whenever a data record is modified, it is marked with both the current date and time and with the ID of the researcher who modified it. This makes it possible to determine who most recently edited a data record, for a level of research accountability. Information on researchers can be included on charts, reports, and exported/imported with the data.

Records stored in the Researchers table are independent of records stored in the Individuals table. This design allows information on researchers for which there is no genealogical interest to be kept out of the Individuals table. When a researcher is also of genealogical interest, a record in both the Researchers table and the Individuals table should be created.

[General Page](#)

[Contact Page](#)

Researchers View: General Page

The **General** page displays the name and other characteristics about the researcher.

The screenshot shows a software window titled "Smythe.GDB: Researchers (1 Records)". Inside, there's a tabbed interface with "General" and "Contact" tabs. The "General" tab is active. At the top, there's a search bar with "1" and a dropdown showing "John Smith". Below this, the "General" section contains several fields: "Name:" with the value "John /Smith/", "Same as Ind:" (empty), "Languages:" with a list box containing "French", and "Reg. ID:" (empty). At the bottom, there's a "Notes:" section with a radio button labeled "Current researcher" which is selected. A large text area for notes is at the very bottom.

Name

Enter the name of the researcher into the **Name** box.

Same as Individual

If the researcher also happens to be same person as an individual in the Individuals table, enter their name in the **Same as Individual** box.

Languages

Enter the languages in the **Language** box that the researcher can communicate in effectively.

Reg. ID

The **Reg. ID (Registration ID)** box is for entry of any researcher registration or identification number that you wish to use.

Current Researcher

The Current Researcher button marks the researcher that represents the current Genbox user. When new data is entered or existing data is modified, the current researcher ID is stored into the data record. This indicates the person who is responsible for entry of the data.

Only one Researcher record can be marked as the current researcher at one time. Marking another record will clear the setting from the previous record that was marked. The name of the current researcher will appear in the status bar.

You can set the Researcher ID that will be set current when a database is opened in **Data Setup**, on the [Defaults page](#).

Notes

Enter your notes about the researcher in the **Notes** box.

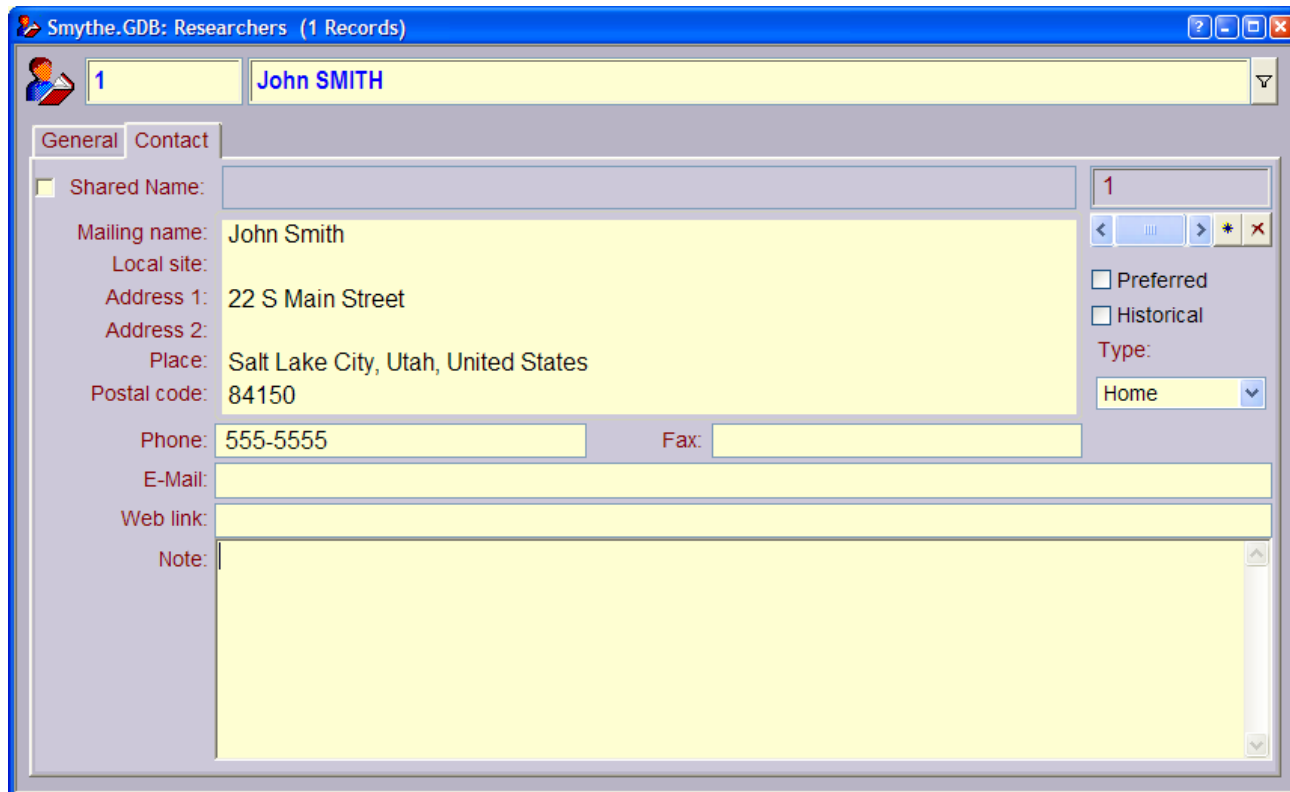
Media Control

The **Media** control is the open area to the right of the middle boxes. It initially displays the first picture that is linked to the researcher, if any. Any number of multimedia objects can be linked to each researcher. See the chapter [Adding Multimedia](#) for help on the **Media** control.

Researchers View: Contact Page

The **Contact page** contains information on addresses for the current researcher. The contents of this page are the same as for individuals. For help, see the section on the [Contact page](#) for the [Individuals View](#).

The address of the researcher can appear on reports, and exported with the data.



The screenshot shows a software window titled "Smythe.GDB: Researchers (1 Records)". Inside, there's a tabbed interface with "General" and "Contact" tabs. The "Contact" tab is active, displaying a form for "John SMITH". The form includes fields for "Shared Name" (with a dropdown showing "1"), "Mailing name" (John Smith), "Local site", "Address 1" (22 S Main Street), "Address 2", "Place" (Salt Lake City, Utah, United States), "Postal code" (84150), "Phone" (555-5555), "Fax", "E-Mail", "Web link", and "Note". On the right side of the form, there are checkboxes for "Preferred" and "Historical", a "Type" dropdown menu set to "Home", and a list box showing "1".

Correspondence View

The Correspondence View presents information on correspondence that was received and sent. You can use it to keep track of your research correspondence.

[Log Page](#)

[Details Page](#)

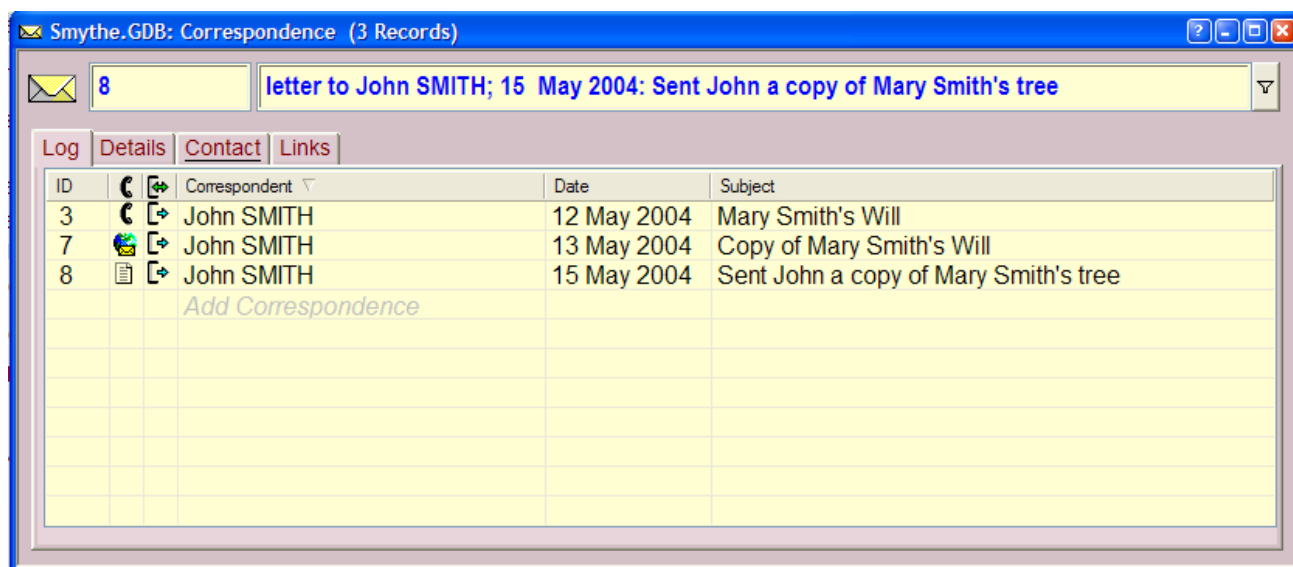
[Contact Page](#)

[Links Page](#)

Correspondence View: Log Page

The **Log page** displays information on correspondence received and sent, in a **log** format. The **Correspondence** list box contains one row for each correspondence record. It has six columns: **ID**, **Correspondence Type**, **Correspondence Direction**, **Correspondent**, **Date**, and **Subject**.

To add a new correspondence log entry, click where it says "Add Correspondence" and type the name of the correspondent.

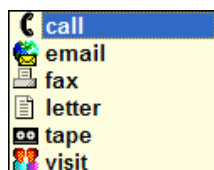


ID

The **ID** column displays the ID of the Correspondence record.

Correspondence Type

The **Correspondence Type** is represented with the following icons:





To change the type, click on the icon or press the space bar until the desired type is shown. You can also press **shortcut keys** to choose the desired correspondence type:

- **C** Telephone call
- **E** E-mail (electronic mail)
- **F** Fax (electronic facsimile)
- **L** Letter (letter or postcard)
- **T** Tape (audio or video tape)
- **V** Visit (face-to-face meeting)

Correspondence Direction

The **Correspondence Direction** is represented with the following icons:

-  Correspondence that was sent (out box)
-  Correspondence that was received (in box)

To change the direction, click on the icon or press the space bar. You can also press **shortcut keys** to choose the desired direction:

- **T, S** Out box ("to" or "sent")
- **F, R** In box ("from" or "received")

Correspondent

Enter the name of the correspondent into the **Correspondent** column. This is a link to the Individuals table, the Places table, or the Researcher table.

For correspondence with a local site, such as an archive or courthouse, enter the name of the local site, not the name of the contact person. If you wish, the name of the contact person, and their title, can be included in the notes.

Date

Enter the date the correspondence was sent or received in the **Date** column.

Subject

Enter the subject of the correspondence in the **Subject** column.

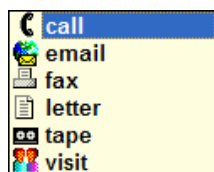
Correspondence View: Details Page

The **Details** page displays full information on the current correspondence record.

The screenshot shows a window titled "Smythe.GDB: Correspondence (3 Records)". The "Details" tab is selected. The record number "3" is in the top left. The subject line reads "letter to John Smith; 15 May 2004: Sent John a copy of Mary Smith's tree." Below this, there are fields for "Type" (set to "letter"), "Direction" (set to "to"), "Correspondent" (set to "Researcher" with "John Smith" in the adjacent field), "Date" (set to "15 May 2004"), and "Subject" (set to "Sent John a copy of Mary Smith's tree."). A timestamp "25/03/2005 8:51:33 PM" is visible. At the bottom, there are empty fields for "Details:" and "Storage:".

Correspondence Type

The **Correspondence Type** is represented with the following icons:

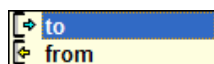


To change the type, click on the icon or press the space bar until the desired type is shown. You can also press **shortcut keys** to choose the desired correspondence type:

- **C** Telephone call
- **E** E-mail (electronic mail)
- **F** Fax (electronic facsimile)
- **L** Letter (letter or postcard)
- **T** Tape (audio or video tape)
- **V** Visit (face-to-face meeting)

Correspondence Direction

The **Correspondence Direction** is represented with the following icons:



- ➡ Correspondence that was sent (out box)
- ← Correspondence that was received (in box)

To change the direction, click on the icon from the list. You can also press **shortcut keys** to choose the desired direction:

- **T, S** Out box ("to" or "sent")
- **F, R** In box ("from" or "received")

Researcher

The **Researcher** box displays the name of the researcher the correspondence was with.

Correspondent Type

The **Correspondent Type** drop-down list presents the following choices for type of correspondent:

Individual
Place
Researcher

Correspondent

Enter the name of the correspondent into the **Correspondent** column. This is a link to the Individuals table, the Places table, or the Researcher table.

For correspondence with a local site, such as an archive or courthouse, enter the name of the local site, not the name of the contact person. If you wish, the name of the contact person, and their title, can be included in the notes.

Date

Enter the date the correspondence was sent or received in the **Date** column.

Subject

Enter the subject of the correspondence in the **Subject** column.

Storage

For the selected correspondence record, enter the offline physical storage location for the item of correspondence (letter, postcard, cassette tape, fax), if any.

Details

Use the **Details** box to record any other information about the correspondence.

Correspondence View: Contact Page

The **Contact page** contains information on addresses for the current correspondent. This is the same as the contact page for individuals. For help, see the section on the [Contact page](#) for the [Individuals View](#).

Smythe.GDB: Correspondence (3 Records)

8 letter to John SMITH; 15 May 2004: Sent John a copy of Mary Smith's tree

Log Details **Contact** Links

Shared Name: 1

Mailing name: John Smith

Local site:

Address 1: 22 S Main Street

Address 2:

Place: Salt Lake City, Utah, United States

Postal code: 84150

Phone: 555-5555 Fax:

E-Mail:

Web link:

☐ Preferred
☐ Historical
Type: Home

Correspondence View: Links Page

The **Correspondence Links** page contains a list box that displays all links to the current correspondence record. Links to correspondence records can be added on the [Projects View](#). A double-click on any row will cause a jump to the corresponding Project/Objective record on the Projects View. This list box has three columns: [ID](#), [Project/Objective](#), and [Priority](#). This list box is read-only.

Smythe.GDB: Correspondence (3 Records)

3 letter to John Smith; 15 May 2004: Sent John a copy of Mary Smith's tree.

Log Details Contact Links

Project/Objective Links to Current Correspondence:

ID	Project / Objective	Priority

ID

The **ID** column displays the unique ID for each project/objective record.

Project/Objective

The **Project/Objective** column displays the name of the linked project/objective record.

Priority

The **Priority** column displays the priority set for the project/objective record.

Research Targets View

Keeping track of your research efforts by recording what you have searched, your findings, and what you plan to search can save you valuable time:

- You can organize your trips to the library or courthouse by reviewing your objectives first and printing out a list of what you hope to find to take with you.
- You can avoid repeating a search by carefully recording what you found the first time.
- You can look through the list of research targets to decide which loose ends you want to work on next.

The **Research Targets View** helps you organize your research objectives and record your results. While you can create new records in this view, you can also create new records with the target data already filled in by clicking on the research target buttons that appear on the data view pages.

[Target Page](#)

[Searches Page](#)

[Links Page](#)

Research Targets View: Target Page

The **Target page** contains information on the data item that is the focus of the current research objective. It also displays a list of the defined searches for the target.

Smythe.GDB: Research Targets (1 Records)

Target Searches Links

Target of Research:

Main item: Other ID 0 Name Gerald Smythe

Sub-item: (none) ID 0

Description:

Search	Scheduled	Completed	Priority	Source/Rep

Main Item Type, ID, and Name

The **Main item type** box identifies the main data type of the target data item:

Individual
Family
Place
Source
Other

The **Main item ID** box displays the ID of the main data table, and the **Main Item Name** box identifies the target main data item by name.

Sub-Item Type, Id, and Name

The **Sub-item type** box identifies the type of the subrecord of the target data item, if any:

(none)
Name Variant
Parents Link
Event
Other

The **Sub-item ID** box displays the ID of the subrecord, and the **Sub-item Name** box displays the specifics of the sub-item: the name variation, or parents, or event information.

Target Description

The **Target description** box can be used to enter your own description of the target of your research. While the **Main item** and **Sub-item** boxes are useful when the target is a specific piece of data already represented in the database, often your target of research will be more general. You can use this field instead of the item boxes. Or, you can set the **Main item** type to "Other" and use the **Main item Name** box for your own purposes.

Searches List

The **Searches** list box contains one row for each Search record for the current target. This information is read-only. Double-clicking on a row will cause a jump to the corresponding Search record on the [Searches page](#). There are five columns: [Search ID](#), [Scheduled](#), [Completed](#), [Priority](#), and [Source/Rep](#).

Search ID

The **Search ID** column displays the unique Search record IDs.

Scheduled

The **Scheduled** column displays the date each search was scheduled.

Completed

The **Completed** column displays the date each search was completed, or blank if incomplete.

Priority

The **Priority** column displays the assigned priority for each search.

Source/Rep

The **Source/Rep** column displays the Source or Repository specified in each search.

Research Targets View: Search Page

The **Search page** displays information on each search scheduled for the current research target. Completed searches can remain as records in the database, so you can review your past searches and avoid repeating your work. You can also produce a report on your scheduled searches.

This page displays one search record at a time.

Smythe.GDB: Research Targets (1 Records)

1 Gerald Smythe

Target Searches Links

Description:

Scheduled: Completed: Priority: (not set)

Source:

Repository:

Location:

Findings:

Description

The **Description** box can be used to enter the specifics about the search: what you hope to find, how you plan to conduct the search, etc.

Scheduled

The **Scheduled** box is for entry of the date that you plan to perform this search. You can use the contents of this field to select search records for output to a report that you could take with you on your next research trip.

Completed

The **Completed** box is for entry of the date that the search was completed. If the search hasn't been conducted yet, this box should be blank.

Priority

The **Priority** box provides the following choices on its drop-down list:

(not set)
Top
High
Normal
Low

Source

If there is a particular source you plan to search, enter it into the **Source** box.

Repository

Enter the repository at which you plan to do the search in the **Repository** box.

Location



Use the **Location** box to enter the call number or other locating information you will need to find your source in the repository.

Findings

Use the **Findings** box to record the results of your search. Record both what you found and what you didn't find.

Subrecord Controls

The **subrecord controls** appear in the top right corner of the page. The **Subrecord ID** box displays the unique ID of the current search record.

- To move to a different search record for the current research target, use the **horizontal scrollbar**. If the "thumb" occupies the entire width of the scrollbar, then there are no other search records defined.
- To add a search record for the same research target, click the **New Subrecord** button . Or, on the **Data** menu, click **Add Search**. Or, use the keyboard shortcut CTRL+L.
- To delete the current search record, click the **Delete Subrecord** button . Or, on the **Data** menu, click **Delete Search**.

Projects View

A **project** in Genbox is a named organization of tasks, or **objectives**. Because the structure of a project is basically the same as an objective or task, both projects and their subordinate objectives can be displayed on the same view. The objectives are organized into a hierarchy beneath a project record. You can define several projects, each with its own hierarchy of objectives.

The **Projects View** displays information on defined projects and their objectives.

[General Page](#)

[Research Page](#)

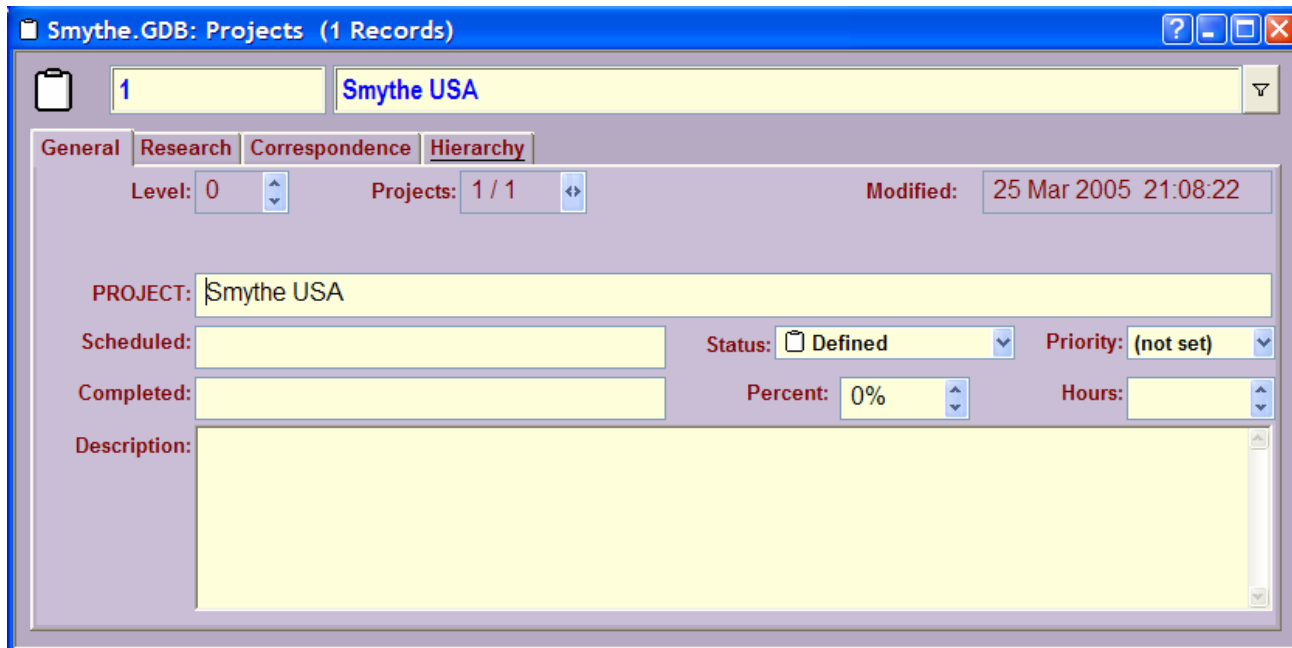
[Correspondence Page](#)

[Hierarchy Page](#)

A task can involve research or correspondence. You can link a project objective record to one or more Research Targets and Correspondence records. This can provide an effective system for organizing your project information.

Projects View: General Page

The **General** page contains a description of the project or objective, and related status and scheduling information.



The screenshot shows a software window titled "Smythe.GDB: Projects (1 Records)". Inside, there's a tabbed interface with "General", "Research", "Correspondence", and "Hierarchy" tabs. The "General" tab is active. At the top, there's a search bar with "1" and a dropdown showing "Smythe USA". Below the tabs, there are fields for "Level: 0" with up/down arrows, "Projects: 1 / 1" with left/right arrows, and "Modified: 25 Mar 2005 21:08:22". The main section has a "PROJECT:" label followed by a text box containing "Smythe USA". Below this are fields for "Scheduled:", "Completed:", and "Description:". To the right of these are "Status:" (a dropdown menu showing "Defined"), "Priority:" (a dropdown menu showing "(not set)"), "Percent:" (a text box with "0%" and up/down arrows), and "Hours:" (a text box with up/down arrows).

Project/Objective

The **Project/Objective** box contains the name of the project or objective. The label on the box will change to indicate whether this is project or objective record.

Level

The **Level** box displays the level in the project/objective hierarchy. For a project record, the level is 0. For the first set of objectives, the level is 1. **Note:** this text box is for record selection only; the text cannot be edited. To change the level of the current objective, first click the tab for the [Hierarchy page](#), then drag the name to the desired parent.

- **To move up a level**, click the up-arrow in the text box. The parent objective record will become the current record.
- **To move down a level**, click the down-arrow in the text box. The first child objective record will become the current record.

Note: use of the up-down arrow buttons is not limited by the current filter, if one is active.

Sequence

The **Sequence** box displays the sequence number for the current objective and the total number of objectives for the parent of the current objective. For Projects, it displays the sequence number for the project and the total number of project records. **Note:** This text box is for record selection only; the text cannot be edited. To change the sequence position of the current objective, first click the tab for the [Hierarchy page](#), then order the child objectives by dragging them one at a time in the desired order and dropping them on the parent.

- **To move to the next objective with the same parent**, click the right arrow button in the control.
- **To move to the previous objective with the same parent**, click the left arrow button in the control.

Note: use of the left-right buttons is not limited by the current filter, if one is active.

Higher Objective

For objective records, the **Higher Objective** pick control displays the name of the next higher objective (or the name of the project, if the next level up is the project level). Clicking on the control will display a drop-down list of the complete hierarchy to the current item. This can help provide a sense of context for the current objective. **Note:** this control is read-only.

For project records, this text box is hidden.

Scheduled

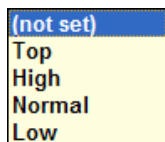
The **Scheduled** box is for entry of the date that this objective or project is scheduled to be started.

Completed

The **Completed** box is for entry of the date that this objective or project was actually completed.

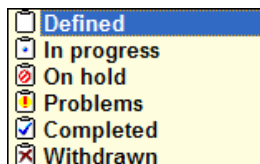
Priority

The **Priority** box is for entry of a priority indicator for the current project or objective:



Status

The **Status** box is for maintaining a status indicator on the current project or objective. The status is represented by icons made to look like clipboards, as shown below:



Percent Complete

The **Percent Complete** box is for entry of the percentage of the total task that has been performed. This value can be considered in conjunction with the status indicator to get a good idea of where things are.

Some of the values of this indicator and the status indicator have been locked together for consistency:

- Setting the Percent Complete to zero will set the Status to **Defined**.
- Setting the Percent Complete to any value greater than zero and less than 100% will change a **Defined** status to **In-Progress**.
- Setting the Percent Complete to 100% will change the status to **Completed**.

Hours

The **Hours** box can store the amount of time spent so far on the current objective. Each click on the up-arrow control will add 1/4 hour to the total. You can also type in any amount that you wish, to the nearest 1/100th hour.

Modified

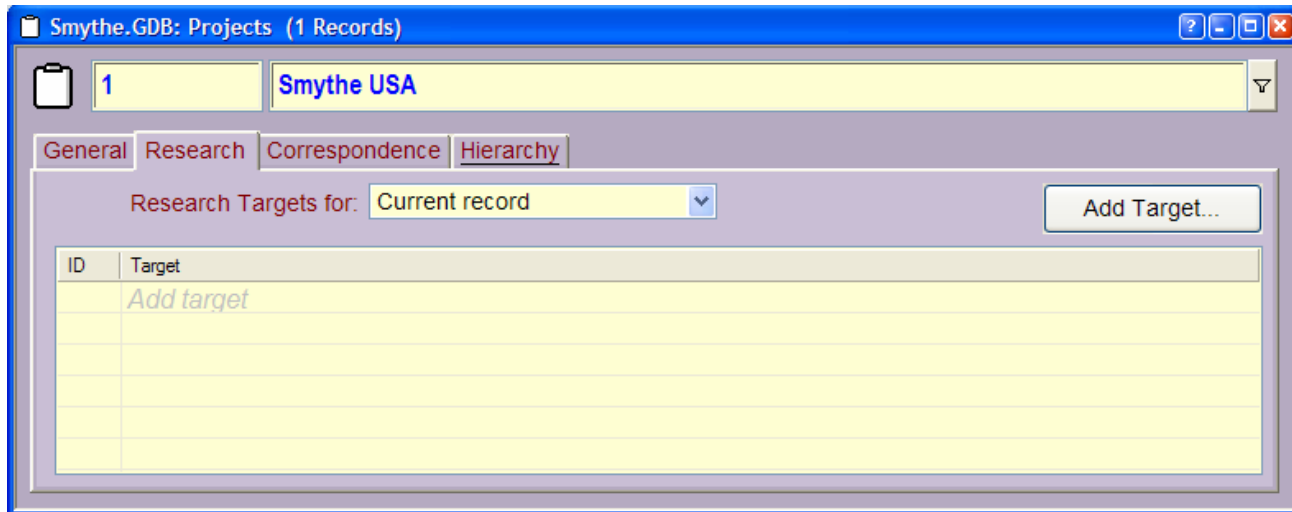
The **Modified** box shows the date the current record was last changed. This text box is read-only.

Description

Enter a description of the project or objective in the **Description** box. This can include what is involved, what needs to be done, and the results that are expected.

Projects View: Research Page

A project objective or task can be linked to one or more Research Targets. The **Research page** contains a list box that contains one row for each linked Research Target record.



Research Targets List Filter

The **Research Targets List Filter** provides the following options for filtering the display of linked research targets:

- **All** - all research targets linked to any project records are shown.
- **Current record** - only research targets linked directly to the current project/objective are shown.
- **Current record and lower** - research targets linked to the current project/objective record and all lower project/objective records are shown.

Add Target Button

To add a new research target link, click the **Add Target...** button. The **Research Targets Pick Dialog** will open. You can select an existing research target or add a new one.

You can also add a new target by clicking where it says "Add Target" in the list box and typing the text of the targeted item.

Research Targets List Box

The List Box contains one row for each linked Research Target record.

- To add a new Research Target link, click on the next empty line in the box.
- Type either the ID or the name of the Research Target you wish to link the current project/objective record to.

The list box has two columns: [ID](#) and [Target](#).

ID Column

The **ID** column displays the unique ID of each Research Target record.

Target Column

The **Target** column displays the name of the Research Target record. Double-click a row to jump to the corresponding Research Target record on the [Research Targets View](#).

Projects View: Correspondence Page

The **Correspondence** page contains a list box that contains one row for each linked Correspondence record.

- To add a new **Correspondence** link, click where it says "Add correspondence".
- Type either the ID or the name of the Correspondence you wish to link the current project/objective record to. When typing the name, begin with the correspondence type, such as "Call" or "Letter". Genbox will auto-complete your entry to the first matching correspondence record.

Smythe.GDB: Projects (1 Records)

1 Smythe USA

General Research Correspondence Hierarchy

Correspondence for: Current record

ID	Correspondence
	Add Correspondence

The list box has two columns: [ID](#) and [Correspondence](#).

ID Column

The **ID** column displays the unique ID of each Correspondence record.

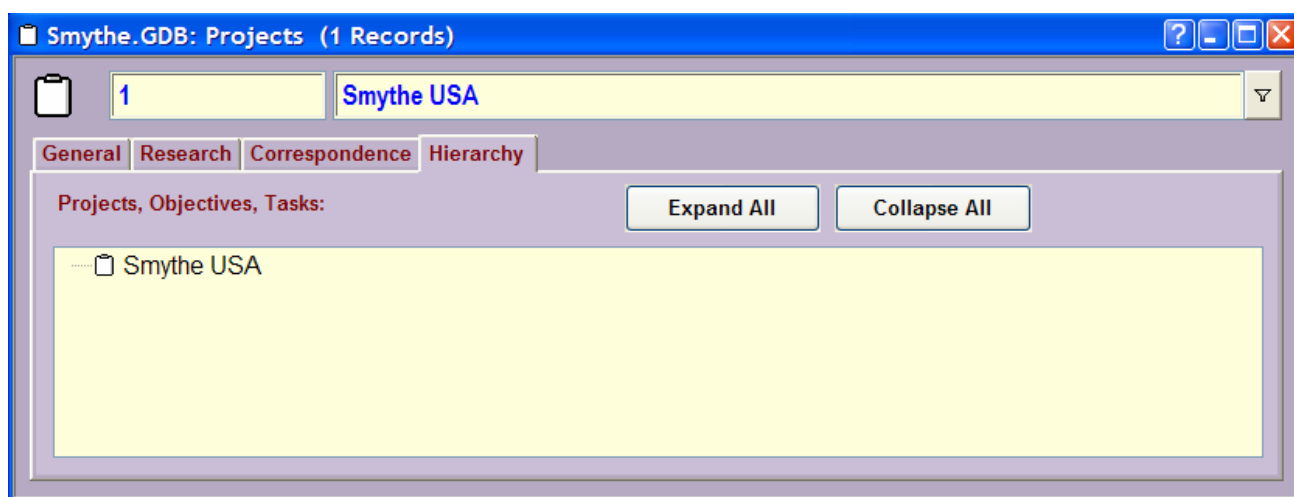
Correspondence Column

The **Target** column displays the name of the Correspondence record. Double-click a row to jump to the corresponding Correspondence record on the [Correspondence View](#).

Projects View: Hierarchy Page

The **Hierarchy page** displays an indented hierarchy of project objectives. Subordinate objectives are shown indented beneath their parent objective. This view gives you an overview of the entire project/objective hierarchy.

- A click on any row will cause a jump to the corresponding project/objective record.
- The status of each objective is shown with an icon to the left of the objective name.
- Rows shown in **bold** indicate items that are marked top-priority.
- Click the **Expand All** button to expand all sub-items, making the entire hierarchy visible.
- Click the **Collapse All** button to collapse the hierarchy, showing only the top-level project items.
- Click on a "+" button to expand the hierarchy below a particular item.
- Click on a "-" button to collapse the hierarchy below a particular item.



Adding Objectives

- To add a lower objective, click on the higher objective, then press CTRL+L. A new item will appear with the name "New". Type the name for the item, then press TAB.
- To add a new objective at the same level as the current objective, press CTRL+N.

Deleting Objectives

- To delete the selected project objective, press DEL, click on the "X" on the main toolbar, or choose Delete Objective from the Data menu. All lower objectives will also be deleted.

Moving Objectives

- To move a project objective, drag its name and drop it on the desired parent. When dropped, it will be added as the last child of the parent. All lower objectives will be moved as well.

You can use this feature to reorder the child objectives of a parent: drag and drop them on the parent in the desired order.

List View

The **List View** is a general-purpose view for manipulating all types of lists in Genbox. Lists can be viewed, created, edited, renamed, copied, pasted, merged, and deleted. Lists can be used on this view for individual record selection, jumping directly to the main data record on the appropriate view. Lists can be used for group record selection on charts, reports, filters, queries, and export. Lists can also be used for deleting groups of records, marking records, filtering views, and setting attribute flags.



The screenshot shows the 'Smythe.GDB: LIST Individuals: 26 Records' window. On the left is a tree pane showing a hierarchy of lists: Smythe.GDB, Recent Activity, Jump History, Filters, Saved Lists (1), Individuals (1), Smythe Family (9), Marks, Flags, Individuals, Places, Media, Event Types, and Records. Under 'Records', 'Individuals (26)' is selected. The main pane on the right displays a table of 26 individuals with columns for ID, Name, and Surname.

ID	Name	Surname
3	Chordray, Anna (abt 1760 -)	
2	Conyer, Elizabeth (1786 -)	
19	Cripps, Edwina (1840 - 1925)	
25	Edwards, Jane	
15	Henson, Rosamund (bef 1862 -)	
5	Moore, Archibald (1775 - 1809)	
6	Moore, Rebecca (1805 - 1875)	
16	Mulrooney, John (1800 - 1870)	
17	Mulrooney, Reginald John (1839 -)	
9	Sauvé, Maria (1815 - 1896)	
11	Smith, Angeline (1840 - 1910)	
10	Smith, Charles (1838 - 1900)	
23	Smith, John Potter (1813 -)	
8	Smith, John Reginald (1836 - 1897)	
20	Smith, Joseph (1876 - 1972)	
12	Smith, Maria (1846 - 1916)	
7	Smythe, John (1813 - 1891)	
1	Smythe, Reginald Edward (1780 - 1826)	
24	Smythe, Sir Charles	
26	Thompson, Lord	
21	Van Stone, George	
18	Wiseman, Edward (abt 1835 - 1882)	
22	Wiseman, Rebecca (1859 -)	
4	Woods, Rachel (1785 - 1818)	
13	Wright, Robert (1831 - 1899)	

Genbox has a number of predefined lists, such as the lists of Individuals, Families, Places, Sources, and other main data records. Other lists may be automatically created by the program as the results of various commands. By having the outputs of these commands as lists, you have many powerful options for manipulating your data.

The view is divided into three panes: the [Tree pane](#) on the left, the [List pane](#) on the right, and the [List Selection Pane](#) on the bottom. The List Selection Pane is normally hidden. There is a **vertical splitter bar** between the left and right panes, and a **horizontal splitter bar** between the top two panes and the List Selection pane. You can drag the splitter bars to adjust the sizes of the panes. You can also drag the outside edges of the window to increase the sizes of the panes.

Tree Pane

The **Tree** pane displays an indented hierarchy, or **tree**, of the names of all the defined lists. List names are grouped by type. After each list name, the current number of members appears in parentheses.

- To select a list, click on its name. The list members will appear in the [List pane](#).

The hierarchy is divided into five main headings:

- Recent Activity:** [Jump History](#), [Possible Duplicates](#), [Potential Problems](#), [Query Results](#), [Chart and Report Result Lists](#), [Filters](#)
- Saved Lists:** user-defined lists that have been created by copying other lists and/or by adding/removing members.
- Marks:** lists of records that have been marked by pressing CTRL+M. Marked records are shown in the marked record font style.
- Flags:** lists of attribute flags for individuals, places, and media.
- Records:** read-only lists of records in each of the main data tables, events, and notes.

Jump History List

The **Jump History** list maintains a record of windows and records that were reached by "jumping" to them. You can jump to related data records in many places in Genbox by double-clicking on the referenced name. You can also jump to a record by entering its record ID or name in the header area of a view, then pressing ENTER. (You can also move among records by using the previous/next arrow buttons on the toolbar; this type of movement, however, is considered "Browsing"; no entries are made on the jump history list for browsing.)

You can quickly return to previous records by clicking on an entry in the jump history list. If the corresponding view is open, a single click will move to the correct record. Otherwise, use a double-click to cause the view to open and become the active view.

Possible Duplicates List

The **Possible Duplicates** list is produced by the [Match Finder Tool](#), selected from the [Tools Menu](#). This is a list of groups of two or more individual records that are considered possible duplicate records, as determined by the settings used for the Match Finder Tool. The groups are shown with one group member per row, and a horizontal line is drawn after the last member in each group to show the divisions between groups. Each time the Match Finder Tool is used, the contents of this list are replaced with the new result set.

Potential Problems List

The **Possible Duplicates** list is produced by the [Problems Spotter Tool](#), selected from the [Tools Menu](#). Each entry on the List pane will be shown on two rows:

- The first row will give the ID and name of the individual record with the problem.
- The second row will describe the nature of the problem.

Dividing lines will be shown between problem entries.

Query Results List

The **Query Results** list appears when a query is performed for individuals on the [Search View](#).

Chart and Report Result Lists

When a chart is produced, five lists appear under Recent Activity:

- **Chart Starters** - a list of all individuals that appear at the "top" of the chart (not connected to a parent box).
- **Chart Keys** - the list of individuals that were entered on the Key Page when selecting chart options.
- **Chart Results** - the list of all individuals that appeared on the chart.
- **Report Keys** - For narrative reports, this is the list of individuals that were entered on the Key Page when selecting report options. For custom reports, this is a list of the main entries before filtering.
- **Report Results** - For narrative reports, this is a list of the main entry individuals. For custom reports, this is a list of the main entries after filtering.

Each time a chart or report is produced, the activity lists are regenerated, replacing the previous list contents. You can copy and paste one of these lists if you wish to save it for future use.

When a report is produced, a **Report Keys** list also appears under Recent Activity.

Filter Lists

All of the main data views can be **filtered**. Filtering restricts the set of records that can be reached by using the browse buttons on the toolbar (First, Previous, Next, Last). You can define a filter for a data view by opening its **Pick Filter Dialog**. When a filter has been defined, the matching records will also appear as a list on the Lists View, under the Filters heading. With access to this list, you can easily modify the filtered record set: you can add or remove list members, and you can also copy and paste other lists to a filter list, causing the corresponding view to update the filtered record set.

Saved Lists

It is possible to name and save your own lists, which will appear under the **Saved Lists** heading. You can copy lists from Recent Activity, Records, Flags, Marks, and other saved lists.

Mark Lists

Records for each of the main data types can be **marked**. When a record has been marked, its name or other identifier appears in the **mark font style**. The default mark font style is italic red lettering. A Mark List appears for each data type. Editing a mark list will also update the records that have been marked.

Flag Lists

Each of the attribute flags for Individuals, Places, and Media has a flag list defined on the List View. Editing a flag list will update the records that have the corresponding flag set. If you wish to add a new flag type or delete an existing flag type, you will need to perform these actions on the **Data Setup View**.

Each of the event type flags also has a flag list defined on the List View: Basic, Nonbasic, Group A, Group B, Group C, Group D, Unique, Hidden, Standard, Attribute, and Recent. Only one record per event tag is shown. This is the record with the best match to the current program language. The "Group A"- "Group D" and "Recent" flag lists can be edited on the List View. "Nonbasic" is a pseudo-flag that contains the event types that are not marked with the "Basic" flag.

Record Lists

The List View includes lists for all the main data records, notes, events, and event types under the **Records** heading:

- Individuals
- Families
- Places
- Citations
- Sources
- Media
- Correspondence
- Researchers
- Research Targets
- Projects
- Notes
- Events
- Event Types

When viewing a record list, you can double-click to jump to a particular record.

Most lists show two columns: **ID** and **Name**. You can sort on a column by clicking on its header label.

The Family list shows three columns: **ID**, **Name1**, and **Name2**. This allows you to sort on either spouse.

When **Projects** is selected, the Tree pane will display an indented hierarchy of the sub-objectives, and the List pane will show the next hierarchy level for the selected objective in the Tree pane.

The **Events** list shows five columns: **ID**, **Date**, **Type**, **Principals**, and **Place**. You can sort by any of these columns. When sorting the Principals column, the records will be sorted into two groups: the first group will be sorted by Primary Individual name for event records that have no Child/Other principal. The second group will be sorted by Child/Other name.

The **Event Types** list shows four columns: **ID**, **Tag**, **Name**, **Language**. Only one record per event tag is shown. This is the record with the best match to the current program language.

The Record Lists are read-only. If you want a custom list of records, you can copy a record list to a Saved List, then add or delete list members as you wish. If you really do want to delete the records themselves, you can choose the "Delete All Records in List" option from the **Data Menu**.

List Pane

The **List** pane displays the list members for the list currently selected in the [Tree pane](#). Each row displays the ID, name, and sometimes additional values of one list member.

- To view the main data record for a list member, double-click the row. The appropriate view will be activated.
- To view the main data record when the appropriate view is already open, you can single-click the row.

You can also use the list pane to step through records on the corresponding view. Press the up/down arrow keys, or the browse buttons on the toolbar to step through members shown on the list pane; the corresponding view will update in step.

List Pane Sorting

You can sort the names in the list pane by clicking on the column headers. A second click on the same column will reverse the sort. An arrow next to the column label will point in the direction of increasing values.

For the "Name" column on Individuals lists, you can sort on either surname-first order or given-name-first order. The default sort order is by surname; clicking on the column header will cycle through surname ascending, surname descending, given name ascending, given name descending. The column header indicates the sort direction and sort type.

List Selection Pane

The **List Selection** pane is made visible when the "Select List..." button is clicked on another view window. This action begins **list selection mode**, which allows you to select a list or list members of a particular type, for use in the other view window. After you make your selection, you must click one of the buttons at the bottom of the List Selection pane before continuing. This pane will then be hidden again.

The List Selection pane displays information about the currently selected list.

List Name

This box displays the name of the currently selected list. You can select a list in the Tree Pane by clicking on it.

ID

Each saved list has an ID, which is displayed in this box.

Change Date

This box displays the date the list was last modified.

Description

This box displays the description that was stored for the list, if any.

Select List Name

To choose the currently selected list, click the **Select List Name** button. The name of the list will be copied to the other view window, and the List Selection pane will be hidden.

When a list name is selected for use as a chart or report key / style set / content set, the members of the list will not be retrieved until the chart or report is generated. This ensures the output stays current with the current list membership. This is particularly useful when the list name is saved in the chart/report options file for later use.

Select List Members

As an alternative to choosing a list name, many list selection buttons allow you to choose particular list members of a list. A list member can be selected by clicking on it in the List pane (the pane on the right). To select more than one list member, hold down the CTRL key while clicking. Or, to select a range of list members, hold down the SHIFT key when making the second click.

When you click the **Select List Members** button instead of the Select List Name button, the names of all the selected members will be copied to the other view window. If no list members were selected, then the names of all members in the currently selected list will be copied.

Note: the [List Name](#) box will continue to show the name of the currently selected list, even when individual members have been selected. To see which list members are currently selected, you will need to look at the highlighted rows in the List pane.

Cancel

Click this button if you choose not to select a list or list members.

Copying Lists

There are several ways you can make a copy of a list. The easiest way is to use the keyboard shortcuts:

COPY AND PASTE

- **Click** on the name of the list in the Tree Pane that you want to copy.
- **Press CTRL+C** to make a copy.
- **Click** on the destination if you want to send it to a particular list, otherwise skip this step.
- **Press CTRL+V** to paste your copy.

The [Paste List Dialog](#) will appear, allowing you to enter a new name for the list, or accept the default name. If you didn't choose a destination, your list will be pasted into the proper data type category under Saved Lists.

Another way to copy lists is to use just the mouse:

DRAG AND DROP

- **Point** to the list you want to copy.
- **Press** the left mouse button, then **drag** it to you where you want to paste the list.
- **Release** the mouse button.

While dragging, an image of the list you are copying will follow the arrow cursor. If the cursor changes to a circle with a bar through it, this means you cannot paste the list to the current destination.

When you release the mouse button, the [Paste List Dialog](#) will appear, allowing you to enter a new name for the list, or accept the default name.

BUILD YOUR OWN

If instead of copying a whole list, you only want to copy a portion of the members, you can create a new list, then use the List Pane to copy just the members you want:

- **Right-Click** on a list that has the desired data type for your new list, such as Individuals, Places, Sources, etc.

- From the Context Menu, **choose "Create new list"**. A new list of the selected type will be created under "Saved Lists" with a default name.
- Now, **click** on a list that has some records you want to copy.
- On the List Pane, **select** the records you want to copy. You can select a single record or a range of records.
- **Press CTRL+C** to copy the selected records.
- **Click** on your newly created list.
- **Click** on the (empty) List Pane side.
- **Press CTRL+V**. The records you copied will be pasted into your new list.

You can repeat steps 3-8 to copy records from other lists. This allows you build up a list with just the members you wish to include.

Copying Lists to Particular Destinations

The List View has several lists that include special functionality. When you manipulate these special lists, corresponding changes occur to the operation of the program.

Copying to a Filter

The Filter Icon under Recent Activity can be a destination for lists of any of the main data view types. If you have the Sources View open, and then copy and paste a Source list to the Filters heading, you will see a new list for "Sources" under filters, and your Sources View will immediately be filtered by the list you copied. You can add or remove members to this list on the List Pane side, and the corresponding view's filter will be updated.

If you wish to clear the filter, you can either open the **Pick Filter Dialog** for the View and press the **Clear Filter** button, or delete the filter list itself.

Copying to a Mark List

Any list copied to either the "Marks" main heading or a subheading of the correct type will cause all records in the list to be marked. This will be immediately visible on the corresponding data view.

Copying to a Flag List

An Individual List can be copied to any of the Individual Flag lists, and this will update all of the records in the list to have the corresponding flag set. This is much faster than moving to each of the Individual records one at a time and setting the desired flag manually. The same is true for Media and Place flags.

Copying to Another Saved List

You can paste any list to another Saved List of the same data type. Using the merge operations available on the [Paste List Dialog](#), you can build up a list with the members desired.

Event Types View

At the heart of a genealogy are the **events** that are recorded for the individuals of interest. Each event data record that is stored for an individual is identified as being of a particular **event type**. Birth event records, for example, include the event tag **BIRT** to mark them as **birth event type** records. The **Event Types View** is used to view and enter information for all the event types used in the current database.

Associated with each event type are a number of **templates**. The templates control how the data is formatted on reports. There is at least one template for every event type. You can define as many additional templates as you like. Each additional template is given a name to identify it. There are also templates for witnesses to the event. Templates can also be defined in multiple languages, allowing for reports to be output in different languages.

Event types can be grouped into categories according to the number and types of links to other data elements that are involved. They can also be grouped according to the period of a person's life in which they normally occur, or by association with major events in a person's life such as birth, starting a family, and death. Sometimes it is useful to be able to group event types directly, for data selection on charts and reports. These capabilities and more are controlled by the **Event Types View**.

The **tag** and name of the current Event Type record appear in the key fields at the top of the view. Unlike other data views which display numeric IDs, the Event Types View identifies each record by its tag. Event tags are unique one-word identifiers. Most are four letters, such as BIRT for birth, MARR for marriage, and DEAT for death.

[General Page](#)

[Templates Page](#)

[Witness Roles Page](#)

[Notes Page](#)

[Links Page](#)

Event Types View: General Page

The **General** page shows both a summary of information for the current event type record and a list of event types in the current group. A different event type record can be selected by clicking on its name in the list box.

Smythe.GDB: Event Types (486 Records)

ASSO Association

General Templates Witness Roles Notes Links

Show Event Types Group: (all types) Fill

English (119 records)

Class	Tag	Lang	Name
6	_AKAN	EN	Also Known As
6	AFN	EN	Ancestral File Num...
5	ANUL	EN	Annulment
3	APPRN	EN	Apprenticeship
6	ASSO	EN	Association
6	TITL	EN	Awarded Nobility T...
2	BAPM	EN	Baptism
2	BAPL	EN	Baptism (LDS)
2	BARM	EN	Bar Mitzvah
2	BASM	EN	Bas Mitzvah
1	BIRT	EN	Birth
2	BLES	EN	Blessing

TAG: ASSO Secondary: Other ind link

Directional: Forward English

Flags: Basic Group A Group B Group C Group D Unique Hidden

Class: Mature / Default

Name: Association

Secondary Label: Associate

Template: Chart Label: ASSO.

[P] was <an [ET]|an associate> of [O] [T] [D+L]

Standard Attribute Recent

Detail label: Place: Local:

Events Group Selector

The **Events Group** list can display all event types or a selected group. You can filter the list by a particular flag, by secondary type, whether the type is directional, and by other ways. The choices provided by the **Events Group Selector** are:

(all types)

- Flag: Basic
- Flag: Nonbasic
- Flag: Group A
- Flag: Group B
- Flag: Group C
- Flag: Group D
- Flag: Unique
- Flag: Hidden
- Flag: Attribute
- Flag: Recent
- Sec: Parents
- Sec: Family
- Sec: Other Ind
- Sec: Name Var
- Sec: Identifier
- Sec: Contact
- Sec: None
- Directional events
- Custom events
- Standard GEDCOM
- Special Processing

Basic event types are those that have the Basic Flag set. The default basic events are Birth, Marriage, Death, and Burial. You may wish to include other events, such as Baptism, in the set of basic events. This group of event types marked basic is used for the default events to show on the Individuals View Summary Page, and the default list of events for the pick list on the Individuals View Events Page.

The **Group A - D** choices reflect membership according to the corresponding **group flags**. **Parent** event types have a Secondary type of "Parents link". **Family** event types have a **Secondary** type of "Spouse link".

Custom event types are those that are not part of the GEDCOM standard. **Recent additions** are those that have the **Recent** flag checked. This flag is set automatically for event types added during a data import.

The **Special Processing** group contains the Global Event Template and the Initial Event Template.

Events Language Selector

The **Events Language Selector** selects the language of the event types that will be shown in the Events Group List.

The pick list displays the names of languages that have templates defined at the top of the list. The count showing after the language name is the number of event type records defined in that language.

To display event type records for all languages, choose the "(all)" choice at the top of the list.

The Events Language Selector works together with the Events Group Selector to limit the Event Type records that are displayed in the Events Group List. If the Events Group Selector is set to Basic Events, for example, and the Events Language Selector is set to Italian, then only "Italian Basic Event Types" will be shown.

Fill Check Box

The **Fill** check box determines what should be done when the selected language does not have a full set of event types defined. If not checked, then only the event types that have been defined for the selected language will be shown in the list. If the Fill check box is checked, then there will be one Event Type record shown for each unique tag in the table, regardless of whether an event type record exists in the currently selected language.

When a data record for a particular event type has not been defined for the current language, the "best" language record available will be listed. The three-letter language codes identify the language of each entry. The order for choosing the "best" language for event type records is the same as is used for generating reports:

- Selected language
- Base language of selected language
- Any language in same language family as selected language
- EN English
- ENU English (US)
- Any English template
- Any base language template
- Any language template

When a substitution for a missing event type record is taken from a language that is not in the same language family as the selected language, the text of the data record will be shown in the **Second Layer text style**, and the text fields will be set to **read-only**. For example, suppose the Events Language Selector is set to "Italian", and there happens to be only four event type records defined for that language (the basic events Birth, Death, Marriage, Burial). If this check box is not checked, then only these four entries would be listed, even when the Events Group Selector is set to "All events". If the Fill check box is checked, then there will be over 100 event types shown, but most will be shown in the Second Layer text style (which typically is gray and italicized). This setting allows you see what you are "missing" in the current language. These "filler" event type records in a different base language cannot be edited. You will need to either switch to their language first, or click the [Add Translation button](#) to add a translation in the currently selected language.

Genbox is distributed with a large number of event type records defined for the base language of English (EN). When the language selector is set to either "English (United States)" or "English (United Kingdom)", you will see the list filled with the "EN" event type records instead. Because they are in the same language family, the text will be shown in the normal font style, and you will be able to edit them.

Events Group List

The **Events Group** list displays the name of each event type record in the current group. You can select a record by clicking on its name in the list. There are four columns in the list: [Class](#), [Tag](#), [Language](#), and [Name](#). You can sort the list by clicking on any of the column headers.

Multiple event types can be selected by holding down the SHIFT key and clicking a second event type. You can also choose "Select All" from the Edit Menu, or press CTRL+A. When multiple event types have been selected, most data entry fields are disabled. You are able to edit the flag check boxes. Any changes will be reflected in all the selected event type records. The check boxes will indicate the status of all records in the selected group: if the checkbox shows a check, that means all records in the selected group have the flag checked. If clear, none have the flag checked. If the checkbox is "colored", that means **some** of the records have the flag checked.

When multiple records have been selected, clicking the "X" toolbar button will prompt for **deletion of all** the selected event type records.

Class Column

The **Class** column indicates the class of the event type. The classes group around life periods: birth, child/youth, education, family start, family end, mature, death, and burial.

Tag Column

The **Tag** column displays the event tag of the each event type record. Event tags are **language invariant**. Once defined, they should not be changed when the event type record is translated into other languages. The tag value is also used to identify events when performing GEDCOM import/export.

Language Column

The **Language** column displays the 2-letter or 3-letter code that identifies the language of the event type record. The 2-letter codes identify base languages. Some examples are:

ENU	English (United States)
ENG	English (United Kingdom)
EN	English base language
NOR	Norwegian (Bokmal)
DEU	German (Germany)
ITA	Italian (Italy)

Name Column

The **Name** column displays the name of the event type. The name is shown in the language of the data record.

Tag

The **Tag** box displays the tag identifier for the current event type. The tag is used to identify event types when exporting data in the GEDCOM format. For standard GEDCOM event tags, this box will be read-only. When adding new event type records for the same language, you will need to enter a unique identifier. When entering language variations of a tag, the tag value should remain the same: the tag text is **language-invariant**. By keeping the tag value the same for each language variation, it serves to identify which event type records are translations of each other.

The GEDCOM standard requires tags to be alphabetic/numeric characters only (no spaces). It is the standard convention to enter tags in all uppercase. For best compatibility with other programs, a leading underscore should be added to the front of the tag to mark the event tag as a user-defined tag.

Secondary Type

The **Secondary Type** box determines the principle roles that events of the current event type will use. Event records can link to up to three individuals directly, which have the role names **primary**, **spouse**, and **other**.

They can also be associated with an **individual identifier** or a **contact** record. Choices on the drop-down list are:

Omit
Parents link
Spouse link
Other ind link
Name variation
Identifier
Contact

The choice for **Secondary Type** will determine the secondary data entry that is shown on the [Individuals View](#), [Events page](#).

Omit

When **Omit** is selected, the only link will be to the primary individual. No secondary data entry field will show on the [Events page](#).

Parents Link

When **Parents link** is selected, all three principle roles will be used. In the forward direction, the context is that of the child, and there will be two secondary data entry fields, one for each parent. The **BIRT** ("birth") event type is a good example. In the forward direction, the event will be named "birth" and you can view/enter the birth information for the current individual, entering the names of the birth parents in the secondary data entry fields. In the reverse direction, the event name appears as "Childbirth", and the context will be that of one of the parents. The secondary data entry will be two data entry fields, one for the child and one for the other parent.

Spouse Link

When **Spouse link** is selected, the secondary data entry will hold the name of the other spouse. This secondary type is used for family event types, such as Marriage.

When an event is added for an event type that has Spouse link as the secondary type, and a spouse name is then entered, a new family record will be created automatically.

Spouse link event types are usually not directional, as the desired template formatting is often identical for the context of either spouse.

Other Individual Link

The **Other individual link** choice is similar to **Spouse link**, except that the two roles are "Primary" and "Other", not "Primary" and "Spouse". The two individuals in an "other" link often are unrelated. These events are not considered family events. On charts, "Other individual" links are not shown. The **ASSO** ("associated") tag is an example of an **Other Individual link** event type.

Other individual link types can be directional. For example, the event template for "Proposed" would be something like "[P] proposed to [S]" and the reverse template could be either "[S] proposed to [P]" or "[P] received a marriage proposal from [S]".

Name Variation

A secondary type of **Name variation** allows an individual identifier of any type to be linked to its defining event. Entry of a name into the secondary data entry box will also cause a new identifier record to be created.

Identifier

A secondary type of **Identifier** allows an individual identifier of a specific type to be linked to its defining event. Entry of text into the secondary data entry box will also cause a new identifier record of that type to be created.

Contact

A secondary type of **Contact** allows an event record to link to one of the individual's contact records. This is useful for the Residency event type, so that the address can be indicated. The secondary data entry box will present a drop-down list of defined contact addresses for the current individual.

Language

The **Language** box displays the language of the current event type record. This box is read-only.

Add Translation Button

Whenever the language of the displayed event type record is not the same as the selected language, an **Add Translation** button will appear next to the Language box. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new event type record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way to add new records for translations of existing event types. When entering the translated text, be sure not to change the **tag** value. This data value is used to link the various translation records of the same event type together.

Directional Event Types

When **Secondary Type** is set to Parents link, Spouse link, or Other individual link, you can mark the event type as **Directional** with this check box. This permits the templates for the event to be different, depending on the context of the current individual. The **Forward/Reverse** button will be enabled to allow you to specify the settings for both contexts.

Forward/Reverse Button

For **Directional** event types, the **Forward/Reverse** button is used to select which set of settings to view/modify. Each click of the button will switch the display back and forth. The current selection will show on the button face, which will have a "pressed" appearance for **Reverse**.

The data entry boxes within the group frame below the button are all directional, including the flags. (The Attribute flag and Recent flag, which appear outside the group frame, are not directional.)

Event Name

The **Event Name** box holds the descriptive name for the event type. For directional event types, a different name should be entered for the reverse direction. For example, the **BIRT** event type has a forward name of "Birth" and a reverse name of "Childbirth". The forward direction is for the context of the child, while the reverse direction is for the context of the parents. If a suitable reverse name is not readily apparent, you can add an asterisk after the name to distinguish it. The **ASSO** event type, for example, has the forward name of "Association" and the reverse name of "Association*".

Event Class

Event types can be grouped around life periods, such as youth and mature, or major changes, such as the start of a family. The **Class** box provides the following choices:

Unknown
Birth
Child / Youth
Education
Family start
Family end
Mature / Default
Death
Burial

The event class groupings are roughly chronological. The class assignments are used to order events when event date information is missing.

Secondary Label

The [Events page](#) can have a Secondary data entry box, for entry of the associated data with an event. The **Secondary label** will be displayed on this data entry box.

The default secondary labels for each secondary type are:

- Parents link: Parents (forward); Child (reverse)
- Spouse link: Spouse
- Other individual link: Other
- Name variation: Name
- Identifier: name of selected identifier type (chosen from dropdown list)
- Contact: Address

Chart Label

Event data that appears on a chart is prefaced by a label that identifies its event tag. The **Chart label** is used for this purpose. The chart labels and their corresponding full event names can appear in the legend box on a chart.

Template

The **template** that appears on this page is the default template for the current event type. Every event type record has at least one template, named "default". It can be viewed and edited here, and also on the [Templates page](#), which can display additional templates.

Detail Label

Beneath the sentence template box on the Events Page, there is a text entry box called "Detail". It can contain any additional text value for the event. The **Detail Label** box can be used to provide a hint to the user as to what type of data to enter into the Detail text box. It will appear immediately to its left. If no value is entered, the label will default to "Detail".

Place Prefix

Place names on narrative reports usually appear in a prepositional phrase, as in "John was born **in** Chicago." The choice for leading preposition defaults to "in" for place levels higher than local sites. The **Place prefix** box can be used to enter a preposition that should be used instead of "in", such as "from" for Emigration, or "to" for Immigration. The place prefix should be entered in the correct language for the event type. Leave this field blank to have the program use the default preposition according to the current language.

Local Prefix

Local site names on narrative reports usually appear in a prepositional phrase, as in "John and Susan were married **at** Christ Church, Newbury, Idaho." The choice for leading preposition defaults to "at" for local sites. The **Local prefix** box can be used to enter a preposition that should be used instead of "at". Leave this field blank to have the program use the default preposition according to the current language.

Flags

The following flags are defined for event types:

Basic Flag

The **Basic** flag identifies event types that are considered basic. The default basic event types are Birth, Marriage, Death, and Burial. You may wish to include other event types, such as Baptism, in the set of basic event types. This flag is used for the default events to show on the Individuals View Summary Page, and the default list of event types for the pick list on the Individuals View Events Page.

Group A, B, C, D Flags

The **Group** flags (A, B, C, D) are for your own use. You can assign event types to these groups however you wish. Event data to include on charts and reports can then be selected by event type membership in these groups.

Unique Flag

The **Unique** flag indicates that the event type represents a single-occurrence event in the life of an individual, such as Birth and Death. This flag is used when processing alternate events.

Hidden Flag

The **Hidden** flag can be used to mark event types that should not be shown on the event type pick lists. This flag is useful for infrequently selected or obsolete event types. By marking these types as hidden, the pick lists will have a more manageable number of choices. Existing event data records of event types marked hidden are not affected.

Standard Flag

The **Standard** flag marks event types that are part of the GEDCOM 5.5 standard.

Family Events versus Dual Individual/Family Events

The **Standard** flag setting also controls how events with a **Secondary Type** of "Spouse Link" will be exported to a GEDCOM file:

When the **Standard** flag is set, "Spouse Link" events will always be written to a GEDCOM file as "Family Events". This is the correct setting for tags like MARR, MARB, ENGA, DIV, and other tags that directly involve family relationships.

When the **Standard** flag is clear, "Spouse Link" events that have a spouse entered will be written to a GEDCOM file as "Family Events", and those without a spouse entered will be written as "Individual Events". This is the correct setting for CENS (Census), RESI (Residence), and other event types that do not directly involve family relationships.

Attribute Flag

Attributes are individual characteristics that persist over long periods of time, such as national origin and religious affiliation. When the **attribute flag** is set, the event type record also serves to define an attribute that will be available to all individuals. The **Detail Label** will define the name of the attribute. All defined attributes appear on the [Individuals View](#), [Attributes page](#), where the values can easily be viewed and entered. Unlike other event secondary types that link to external records, Attribute event records store the attribute data within the event record itself.

Recent Flag

The **Recent** flag will be set automatically for newly added event type records, as when they are created during a data import. To review/modify the recent additions, you can set the **Events Group Selector** to "Recent Additions". After you have completed your update to a new event type, you can clear the **Recent** flag for that record.

Adding New Event Types

There are several ways to add a new event type record. First, you need to decide whether you want to add a translation of an existing type, or add an entirely new event type.

If you want to **add a translation** for an existing event type:

Check the "Fill" check box.

Select the desired language from the drop-down list.

Select the event type record of the desired type in any existing language translation. The **Add Translation** button will appear.

Click the **Add Translation** button. Or, choose **Add Copy of Event Type in Selected Language** from the Data Menu (shortcut key: CTRL+L).

Translate all the text for the event type record, **except** for the tag itself.

If you want to **add an entirely new event type**:

Choose **Add New Event Type** from the Data Menu (shortcut key: CTRL+N). A new event type record will be created, with data values initialized according to the values set in the "Initial Template" record. The language will default to the currently selected language.

Enter a unique value for the tag first.

If you want to add an entirely new event type, but base it on values in the current event type record:

Choose **Make Copy of Event Type** from the Data Menu. A copy of the current event type record will be made, with a "1" appended to the tag and to the name.

Updating Empty Language Fields

A database created prior to version 3.1.4 will not have any values set in the event type records for "language". You can update each record one at a time to enter the correct language, or you can update all of the event type records that have a blank language value at once. To do this update procedure:

First, verify that the current program language (set in Preferences on the Operation page) is the desired language.

Open the Event Types View.

Choose **Update Empty Language Fields** from the Data menu. When asked to confirm, choose OK.

This operation should be performed once for older Genbox databases.

Event Types View: Templates Page

The **Templates page** displays the templates defined for the current event type record. Each event type will have a minimum of one template, which is the default template, and this template can also be viewed and edited on the [General page](#). Additional templates can be defined, which will allow the user to pick the template he wants to use for event records. New templates can be defined for particular **subtypes** of the current event type. Directional event type will have a pair of templates for each subtype.

The subtype templates shown on this page are linked to the current event type record shown on the General page.

- To add a new event subtype, click where it says "Add subtype" and type the text for the identifying SUBTYPE label.

The screenshot shows a software window titled "Smythe.GDB: Event Types (648 Records)". Inside, the "ASSO" event type is selected, and the "Association" template is displayed. The "General" tab is active, showing a language selector set to "English" and a "Direction" button set to "Forward". Below this is a table of subtypes and their templates.

SUBTYPE	Lang	Subtype Label	Detail Label	Full Template	Brief	Abbrev.
(Default)	EN	Association		[P] was <an [ET]an associate> of [O] [T]		asso.
CLIENT	ENG	Client		[P] was <an [ET]an associate> of [O] [T]		
ADMINISTRATOR	ENG	Administrator		[P] was <an [ET]an associate> of [O] [T]		
<i>Add subtype</i>						

Language Selector

The **Language Selector** selects the language of the event subtype records that will show in the Templates List. The pick list displays the names of languages that have event types defined at the top of the list:

The screenshot shows a vertical list of language options, each preceded by a small flag icon. The options are: (all languages), Danish, Dutch (Belgium), Dutch (Netherlands), English, English (United Kingdom), English (United States), French (Canada), French (France), German (Germany), Italian (Italy), Norwegian (Bokmal), Polish, Portuguese (Portugal), Slovak, Slovenian, and Swedish.

To display event subtype records for all languages, choose the "(all)" choice at the top of the list.

Add Translation Button

Whenever the language of the displayed event subtype record is not the same as the selected language, an **Add Translation** button will appear next to the Language Selector. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new event subtype record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way to add new subtype records for translations of existing event subtypes. When entering the translated text, be sure not to change the **SUBTYPE** value. This data value is used to link the various translation records of the same event subtype together.

Templates List

The Templates List contains the full set of subtype records defined for the current event type. When a defined subtype is missing for the selected language, the "best" subtype record will be included in the list instead. If the language of this "best" subtype template is in a different language family, the text will be shown in the Secondary Data font style.

The first template displayed is the default template for the event type. The SUBTYPE label for this record is displayed as "(Default)" and cannot be modified.

The list box contains seven columns: [SUBTYPE](#), [Language](#), [Subtype Label](#), [Detail Label](#), [Full Template](#), [Brief](#), and [Abbreviated](#).

The SUBTYPE tag is language-invariant. Values for the other label and template columns should be entered in the selected language.

You can right-click on any template and choose **Magnify Templates** (or click a row and press shortcut key **F5**) to edit the templates in a larger view.

SUBTYPE

The **SUBTYPE** column contains the language-invariant subtype tag that identifies the event subtype. By using the same text identifier for subtypes of the same event type but for different languages, the reports can choose the correct template according to the output language. If you are adding new subtypes, you can define the subtype tag in your own language. Then if your templates are used for other languages, the subtype tag will stay the same and the other columns will be translated.

Language

The **Language** column identifies the language of the subtype record. It displays the 2-letter or 3-letter language code. This value is read-only.

Subtype Label

The **Subtype Label** column contains the name that will appear on the **Template Selector** drop-down list on the [Events page](#). It should be entered in the same language as the current Event record.

Detail Label

The **Detail Label** column contains the text that will appear as the label to the **Detail** box on the [Events page](#). The text should be entered in the same language as the current Event record.

Each subtype can provide its own hint to the user as to what type of additional data is expected in the detail field. The template can then refer to this data with the **[T]** sentence code. Often the detail label will be the same text as the subtype label.

Full Template

The **Full Template** column shows the full form of the template. This text can be edited the same way as the template text on the [General Page](#).

Brief

The **Brief** column shows the brief form of the template. The brief templates can be selected for use on charts and in child paragraphs on narrative reports.

Abbreviated

The **Abbreviated** column shows the abbreviated form of the template. Abbreviations can be selected for use on charts and in child paragraphs on narrative reports.

Examples of full, brief, and abbreviated templates:

FULL	BRIEF	ABBREVIATED
[P] was born [D+L]	born	b.
[P] was baptized [D+L]	baptized	bp.
[P] died [D+L]	died	d.
[P] married [S] [D+L]	married	m.

Forward/Reverse Button

For **Directional** event types, the **Forward/Reverse** button is used to select which set of templates to view/modify. Each click of the button will switch the display back and forth. The current selection will show on the button face, which will have a "pressed" appearance for **Reverse**.

The subtype label, full, brief, and abbreviated template values can be different for forward/reverse directions. The SUBTYPE tag and Detail Label are the same for both directions.

Deleting a Subtype Template

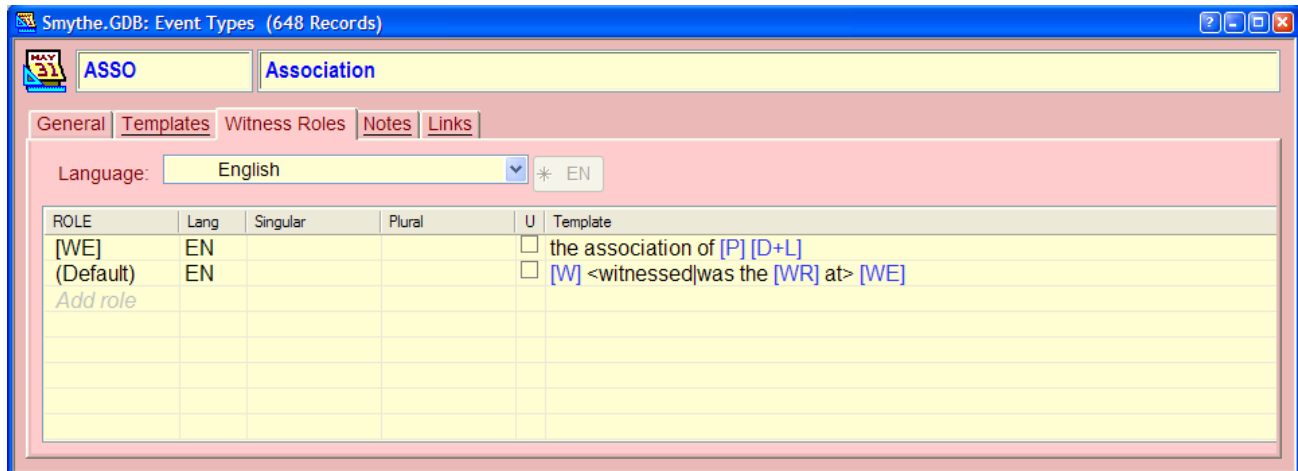
To delete a subtype template, click on its row, then press the DEL key. You will be prompted to confirm the operation. When performed, only the subtype template record for the displayed language code will be deleted.

Event Types View: Witness Roles Page

In addition to the individuals participating in the principle roles in an event, there can be any number of **witnesses**. The names of witnesses are added to an event in the **Witnesses** list box on the [Individuals View](#), [Events page](#). The role that each witness plays can also be specified in the list box.

You can define a template for named roles in an event. You can also define a default witness template for witnesses that are identified without one of the named roles. When reports are then generated, the witnesses data will be formatted into sentences along with the other event data, using the templates.

- **To add a new witness role**, click where it says "Add role" and type the text for the role label.



ROLE	Lang	Singular	Plural	U	Template
[WE] (Default)	EN			<input type="checkbox"/>	the association of [P] [D+L]
	EN			<input type="checkbox"/>	[W] <witnessed was the [WR] at> [WE]
Add role					

Language Selector

The **Language Selector** selects the language of the event witness role records that will show in the Templates List. The pick list displays the names of languages that have event types defined at the top of the list.

To display event witness role records for all languages, choose the "(all)" choice at the top of the list.

Add Translation Button

Whenever the language of the displayed event witness role record is not the same as the selected language, an **Add Translation** button will appear next to the Language Selector. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new event witness role record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way to add new witness role records for translations of existing event witness roles. When entering the translated text, be sure not to change the **ROLE** value. This data value is used to link the various translation records of the same event role together.

Witness Role Templates List

The Witness Role Templates List contains the full set of defined roles for the current event type. When a defined role is missing for the selected language, the "best" role template will be included in the list instead. If the language of this "best" role template is in a different language family, the text will be shown in the Secondary Data font style.

The list box contains one row for each defined witness role for the event type. It has six columns: [ROLE](#), [Language](#), [Singular](#), [Plural](#), [Unique Role \(U\)](#), and [Witness Template](#).

The ROLE tag is language-invariant. Values for the other label and template columns should be entered in the selected language.

You can right-click on any template and choose **Magnify Templates** (or click a row and press shortcut key **F5**) to edit the template in a larger view.

Role Name

The **ROLE** column defines the **language invariant** names of the predefined roles for an event. By using the same text identifier for roles of the same event tag but for different languages, the reports can choose the correct template according to the output language. If you are adding new witness roles, you can define the role tag in your own language. Then if your templates are used for other languages, the role tag will stay the same and the other columns will be translated.

Language

The **Language** column identifies the language of the witness role record. It displays the 2-letter or 3-letter language code. This value is read-only.

Singular

The **Singular** column contains the name of the role in the language of the current event type record. It will appear on the Role Selector List on the Individuals View, Events Page.

Plural

The **Plural** column contains the plural form of the role name, in the language of the current event type record. It is used in the [WWR] (list all witnesses with roles) template code whenever two or more witnesses have the same role name. If no plural form is entered, the system will generate a plural form when required on reports.

For example: for the role "groomsman", the plural would be entered as "groomsmen".

Unique Role Column (U)

The **Unique role** column ("U") contains check marks that indicate whether the corresponding roles are unique to the event. A unique role is one that can be filled by at most one individual. This influences the choice of article when formatting the text; "the" will be used for unique roles, and "a/an" for roles that can be filled by multiple people.

Witness Template

The **Witness template** column contains the witness templates for the predefined roles. [WE] can be used to refer to the **Witnessed event macro**, and [WR] can be used to refer to the name of the current role. The default witness template for most event types is "[W] <witnessed|was the [WR] at> [WE]". This produces sentences like "John Smith witnessed the marriage of Paul Stevens and Mary Owens in June, 1846".

Witnessed Event Macro

The first template displayed is the **Witnessed Event Macro** for the event type. The ROLE label for this template is displayed as "[WE]" and cannot be modified.

The **Witnessed event macro** is like a portion of a template. It can contain template codes. Other witness templates can refer to it with the template code [WE]. This design is useful because the witness templates often have a portion that is common to all or most of them. By extracting this portion out and referring to it with its own code, the templates become simpler to understand and easier to maintain.

Default Witness Role Template

The second template displayed is the default witness template for the event type. This template will be used for witnesses that do not have defined roles. The ROLE label for this template is displayed as "(Default)" and cannot be modified.

Delete a Witness Role

To delete a witness role template, click on its row, then press the DEL key. You will be prompted to confirm the operation. When performed, only the witness role template record for the displayed language code will be deleted.

Event Types View: Notes Page

The **Notes page** contains a place to describe the event type, both generally and in terms of a definition, and a few other miscellaneous items.

The screenshot shows a software window titled "Smythe.GDB: Event Types (486 Records)". Inside, there's a tabbed interface with tabs for "General", "Templates", "Witness Roles", "Notes", and "Links". The "Notes" tab is active. At the top, there's a text box containing "ASSO" and a label "Association". Below this, there are two dropdown menus: "Default source type:" set to "(none)" and "Default local site type:". To the right of these is a timestamp "29 Jul 2004 12:01:43". The main area is divided into two sections: "Definition:" and "Notes:". The "Definition:" section contains the text "An indicator to link friends, neighbors, relatives, or associates of an individual." The "Notes:" section is empty.

Default Source Type

The data that a genealogy researcher collects comes from a variety source types. For some event types, a particular source type is most frequently employed, like birth registers for birth events, or marriage registers for marriage events. The **Default source type** box allows you to associate a particular source type with each event type. When a new source citation is then added for an event record, the default for the corresponding event type will initially be selected.

Default Local Site Type

For some event types, the local site information is often of a particular type. For Burial events, for example, the local site type is often "Cemetery". The **Default local site type** box allows you to associate a particular local site type with each event type. When a new local site is then added for an event record, the default local site will be the one associated with the corresponding event type.

Change Date

The **Change data** box indicates when this event type record was last modified. It is read-only.

Definition

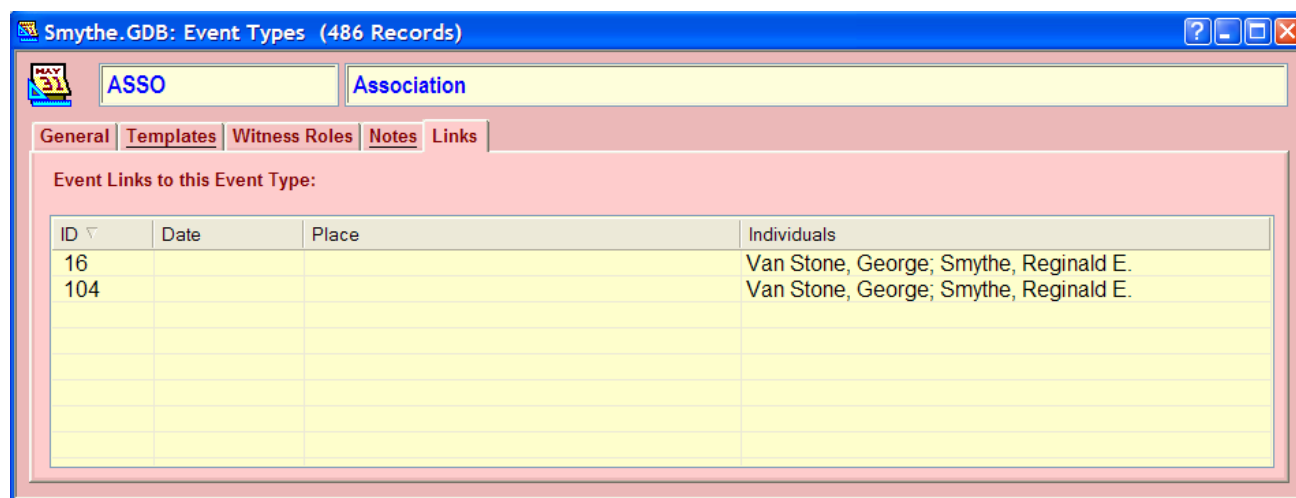
While some event types are familiar to most people, a lot of event types are less common. The **Definition** box provides a place to explain the event type.

Notes

You can use the **Notes** box to enter any other information about the event type, such as guidelines on how the templates should be used, or examples of situations when other event types should be used instead.

Event Types View: Links Page

The **Links page** contains a list box that displays one row for each Events record linked to the current Event Types record. A double-click on any row will cause a jump to the [Individuals View](#) of the primary individual to display the event.



The list is read-only. It has four columns: [ID](#), [Date](#), [Place](#), and [Individuals](#).

ID Column

The **ID** column displays the ID value of the linked Event record.

Date Column

The **Date** column displays the date of the event.

Place Column

The **Place** column displays the place of the event.

Individuals Column

The **Individuals** column displays the principal individuals of the event.

Source Types View

Sources used in researching a genealogy can be of many different types: birth, death and marriage registers, letters, wills, census records, national archive records, journal articles, family bibles, books, cemetery markers, church minutes, diaries, interviews, maps, obituaries, photographs, and so on. The information collected, and the format in which it is presented, will vary for each type. The **Source Types View** is used to define the source types: the types of data that will be stored, and how the data will be formatted on reports. Each time you add a new record on the [Sources View](#) for one of your source documents, you will select a **Source Type** for the record. Your selection will determine the data entry boxes that will be presented, and the default formatting for the data. The formatting is controlled by **templates**. There are three templates defined on the [Templates page](#) for each source type, which are used to format source citation data into sentences when producing reports. You can also override the default formatting and define your own formatting for each source record.

[General Page](#)

[Settings Page](#)

[Templates Page](#)

[Notes Page](#)

[Links Page](#)

Source Types View: General Page

The **General page** shows both a summary of information for the current source template record and a list of source types in the current group. A different source template record can be selected by clicking on its name in the list box.

Template Group Selector

The **Templates Group** list can display the names of all Source Template records or a selected group. The choices provided by the **Template Group Selector** are:

All types
Documents
Sources
Hidden
Recent additions

Recent additions are those that have the **Recent** flag checked on the [Notes page](#). This flag is set automatically for event types added during a data import.

Templates Group List

The **Templates Group** list displays the name of each Source Template record in the current group. You can select a record by clicking on its name in the list.

Level

The **Level** box is used to assign a **source level** to the current record. The three source levels are represented by icons as follows:

Source
Doc. in source
Document

The **Document** level is generally for unpublished, loose documents (not part of larger works). The **Document in Source** level is for documents that are part of larger works, where the larger work is represented as a separate source record (at the Source level). The **Source** level is generally for published works. It can also be used for a collection of documents.

Template Name

The **Template name** is the name that will appear as the **Source type** on the [Sources View](#). It should be a descriptive name that will distinguish the current record from other source template records.

Higher Source

When the level for the current record is set to level 2 (Document in Source), the **Higher Source** box will be available to select the default source type for the higher source record.

Field Labels

While the Source Table has a fixed number of fields for storing source data, the **labels** that are displayed next to the data entry boxes on the [Sources View](#) can be changed to indicate what types of data should be entered into them. The default labels are slightly different for document-level sources and source-level sources. A table of the data fields that can have custom labels is shown below:

Generic name (Source Types View)	Default for Document Level (Sources View)	Default for Source Level (Sources View)
Title	Doc title	Source title
Qualifier	Doc qualifier	Source qualifier
Place	Doc place	Pub. place
Subject	Doc subject	Publisher
Date	Date; Orig. date	Date; Orig. date
Locator	Doc Locator	Source locator

The **Place** field holds a link to a Places Table record. The label can suggest a place level or purpose for the place that is expected. There are two **Date** fields which share a single label, and hold date values, either full dates or partial dates, such as a month and year or just a year. The **Title**, **Qualifier**, **Subject**, and **Locator** data fields are plain text fields that can hold anything. However, the suggestive names of these fields should direct usage when corresponding values are found in the source document, to lend consistency. The **Title** field is used for the identifying names of documents. The **Qualifier** field can store a modifier applied to the title, or something that in some way limits or restricts the reference. The **Subject** field can store what the document is about. The **Locator** field can provide the page number, call number, or other locating value, to locate a record in a repository or in the higher source.

For example: the labels on the fields defined by a U.S. Census source template record could be:

Generic name	Custom Label	Comments
Title	Schedule	Tells user that the expected value is "population schedule" or some other schedule.
Qualifier	Page	Location within the schedule.
Place	County	The "County" label suggests the place level expected.
Subject	Household	The "Household" label directs the user to the subject information.
Date	Census Year	The "Census Year" label indicates that just a year is expected, not a full date.
Locator		The "Locator" label is blank, so the default will be used.

Field Defaults

In addition to custom labels for data entry boxes, some of the data fields can have **default values**. When a new record is added on the [Sources View](#), and the **Source type** is set to a source type record that has default values, the defaults will be copied into the fields in the new record. The user can still change the values to whatever he wants.

The fields that can be assigned default values are:

- Title
- Qualifier
- Subject

Author Type Default

The **Author** box on the [Sources View](#), [General page](#) has a label that can be changed for each source record, to indicate the specific role of the "author", when the person given is, in fact, serving in some other role. The **Author type default** box can be used to specify what the default for the author label should be. Choices are:

Author
Agency
Abstractor
Artist
Compiler
Editor
Photographer
Transcriber
Translator

You can also type in your own label, if it is not available on the drop-down list. If you type in your own label, it becomes a fixed label that the user will not be able to change. For example, the "Interview" Source Template record has the **Author type default** set to "Interviewer", which tells the user that the name of the person conducting the interview should be typed in that box.

Source Types View: Settings Page

The **Settings** page provides additional data elements for the current Source Template record.

Smythe.GDB: Source Types (95 Records)

9 Book

General Settings Templates Notes Links

Default name: [TEMPLATE]: [DOC TITLE]

☒ Recent 15 Oct 2005 10:49:48

☐ Hidden

Default Name

Each Sources record added on the [Sources View](#) needs to have a name that will be used within Genbox. The name should clearly identify the record. A consistent naming system for your source records should also be used, so that it will be easier to find records when you want to reference them. The **Default name** box on this page is for entry of a template that will be used to name Source records. With a template defined, you can enter the other data fields on the Sources View, and the name will automatically be assigned, based on the data.

For example, suppose you want your names to begin with the source template type, then to be followed by the title of the document. The special keyword [TEMPLATE] can be used to refer to the shortened form of the template name. The template would be:

[TEMPLATE]: [DOC TITLE]

For other source template records, it could be that the subject is more important than the title, as on census documents. The template on those records would be:

[TEMPLATE]: [DOC SUBJECT]

Recent Check Box

The **Recent** check box indicates this is a recently added record. You can check and clear this field as you wish.

Hidden Check Box

When the **Hidden** check box is checked, the listing of the source type on the Source Type Pick List of the Sources View is suppressed. You may wish to hide the source types that you don't intend to use.

Change Date

The **Change date** field store the date this record was last modified. It is read-only.

Source Types View: Templates Page

Each Source Templates record has three **templates** defined. The templates are used as the default formatting for source citations. They are defined on the **Templates page**. For help on the use of these fields, see the section [Source Templates](#).



Primary Citation

The **Primary citation** template is used for formatting the first source citation to a source. It is the most complete citation.

Secondary Citation

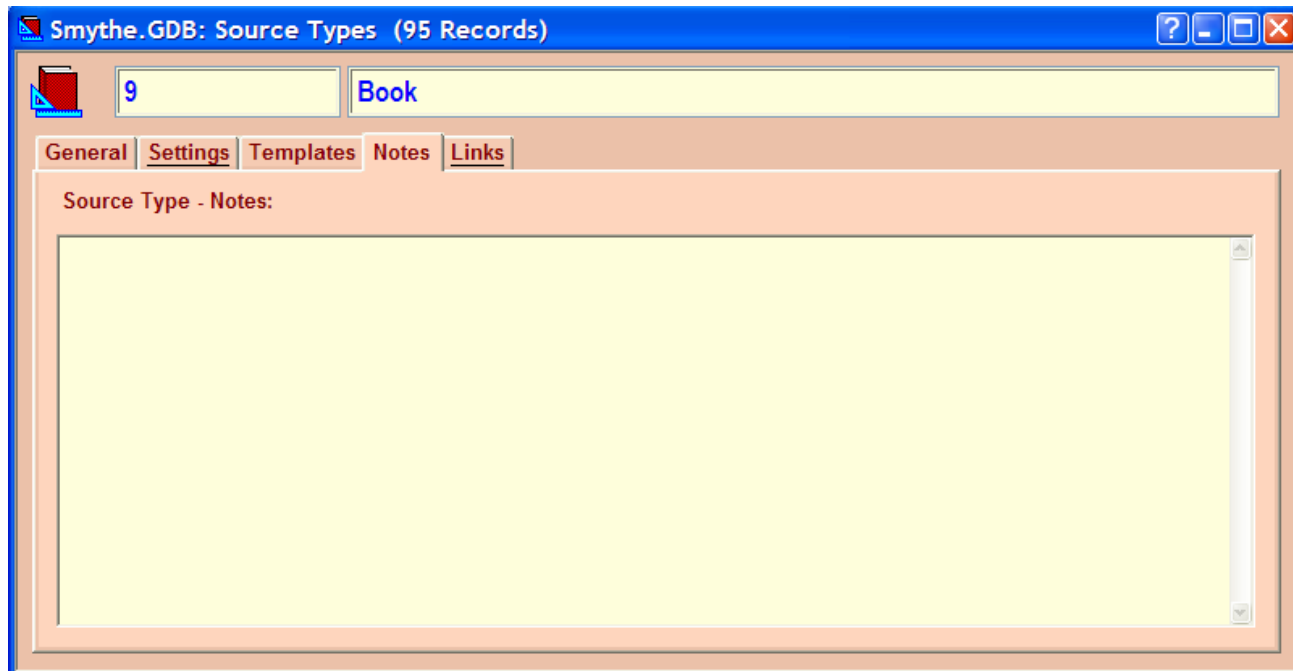
The **Secondary citation** template is used for formatting secondary citations to a source. Its content is usually reduced.

Bibliography

The **Bibliography** template is used for formatting data about the source for the bibliography section of the report. Specifics of individual citations are often omitted from the bibliography.

Source Types View: Notes Page

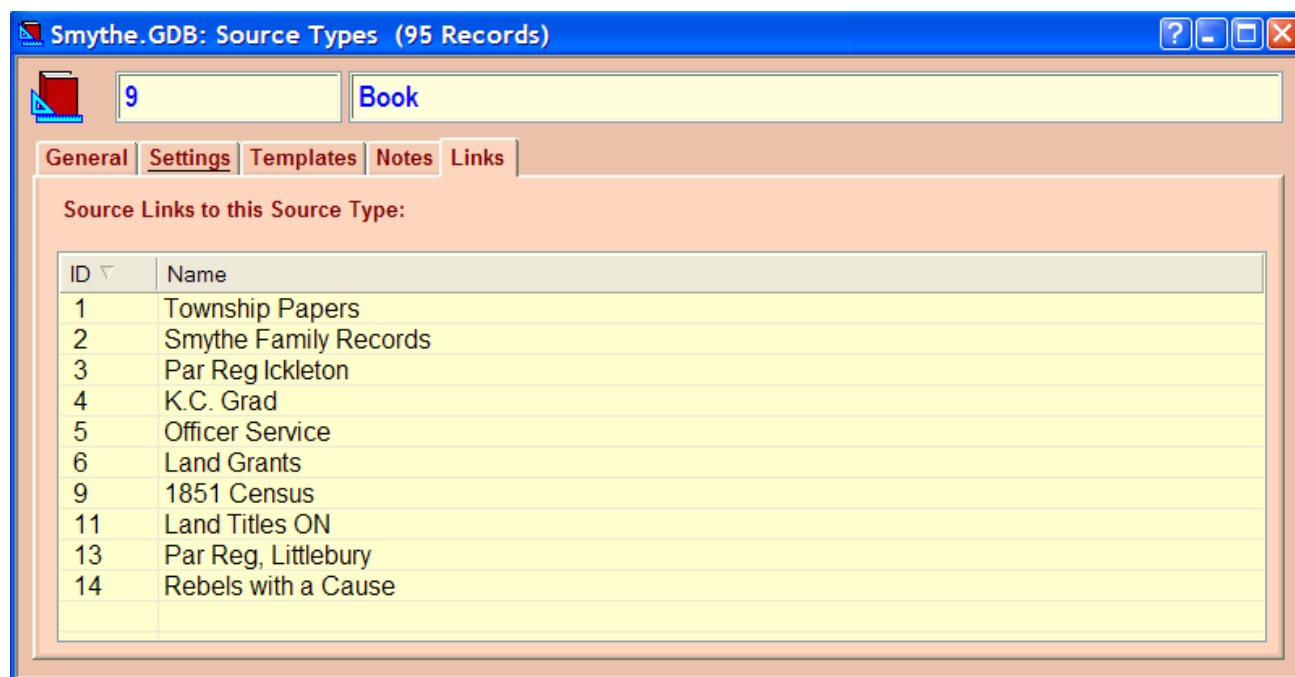
The **Notes page** provides for entry of any notes you may wish to store regarding the current source type record. Enter any text you wish, such as intended usage for this type, or how it differs from similar types.



The screenshot shows a software window titled "Smythe.GDB: Source Types (95 Records)". Inside the window, there is a search bar with the number "9" and a dropdown menu showing "Book". Below the search bar is a tabbed interface with five tabs: "General", "Settings", "Templates", "Notes", and "Links". The "Notes" tab is currently selected. The main area of the window is labeled "Source Type - Notes:" and contains a large, empty text area for entering notes. The text area has a light yellow background and a vertical scrollbar on the right side.

Source Types View: Links Page

The **Links page** contains a list box that displays one row for each Sources Table record linked to the current Source Templates record. A double-click on any row will cause a jump to the [Sources View](#) to display the corresponding record.



The list is read-only. It has two columns: [ID](#) and [Name](#).

ID Column

The **ID** column displays the ID value of the linked Sources Table record.

Name Column

The **Name** column displays the name of the linked Sources Table record.

Data Setup View

The **Data Setup View** is for display and entry of identifier types, flag definitions, and other custom data items that are used on the other data entry views. These values are stored with the database, so each database can have its own values.

[Identifier Types Page](#)

[Individual Flags Page](#)

[Media Flags Page](#)

[Place Flags Page](#)

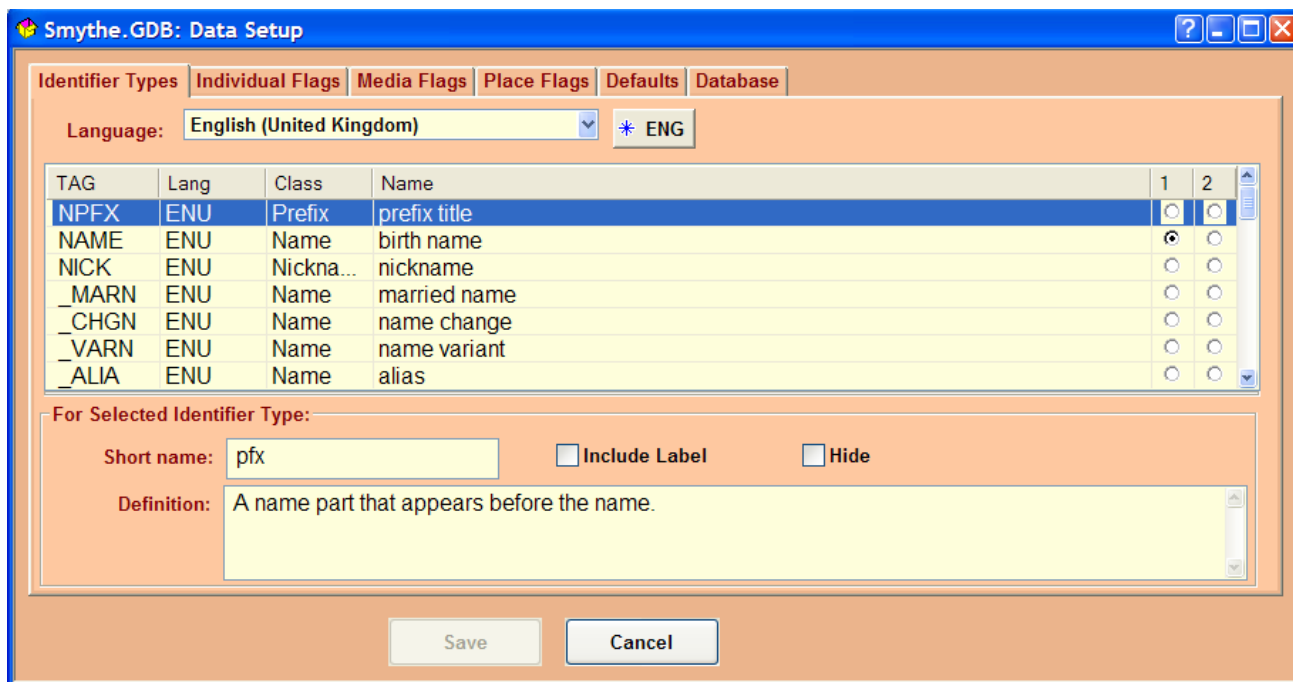
[Defaults Page](#)

[Database Page](#)

Data Setup View: Identifier Types Page

Individuals in your database can have multiple **identifiers**. These include names that they used during various periods of their life, and also other types of identifiers, such as a social security number (SSN). You can also make up your own system of identifiers to help you keep track of the individuals in your database.

The **Identifier Types page** on the Data Setup View is used to view/modify the list of identifier types that have been defined for the current database. This page contains a list box with one row for each identifier type that can be assigned to an individual, and a number of additional data fields below the list box that are associated with the currently selected list item. A language selector and language translation button appear above the list box.



The screenshot shows the 'Smythe.GDB: Data Setup' window with the 'Identifier Types' tab selected. At the top, there are tabs for 'Identifier Types', 'Individual Flags', 'Media Flags', 'Place Flags', 'Defaults', and 'Database'. Below these is a 'Language' dropdown set to 'English (United Kingdom)' and a button with a star and 'ENG'. The main area contains a table with columns: TAG, Lang, Class, Name, 1, and 2. The table lists several identifier types, with 'NPFX' selected. Below the table, there is a section 'For Selected Identifier Type:' with fields for 'Short name:' (pfx), 'Include Label' (checkbox), 'Hide' (checkbox), and 'Definition:' (A name part that appears before the name.). At the bottom are 'Save' and 'Cancel' buttons.

TAG	Lang	Class	Name	1	2
NPFX	ENU	Prefix	prefix title	<input checked="" type="radio"/>	<input type="radio"/>
NAME	ENU	Name	birth name	<input type="radio"/>	<input type="radio"/>
NICK	ENU	Nickna...	nickname	<input type="radio"/>	<input type="radio"/>
_MARN	ENU	Name	married name	<input type="radio"/>	<input type="radio"/>
_CHGN	ENU	Name	name change	<input type="radio"/>	<input type="radio"/>
_VARN	ENU	Name	name variant	<input type="radio"/>	<input type="radio"/>
_ALIA	ENU	Name	alias	<input type="radio"/>	<input type="radio"/>

For Selected Identifier Type:

Short name: ☐ Include Label ☐ Hide

Definition:

Language Selector

The **Language Selector** selects the desired language of the identifier type records to show in the list box.

Regardless of the language selected, the list box will show an entry for every unique identifier tag that has been defined. When an identifier type has not been defined in the selected language, the record with the "best" language match to the selected language will be shown instead. If the base language of this substitute record is different than the desired base language, the data values will be shown in the secondary font style (normally, this is gray italicized text). The data values will be read-only in this case.

To display identifier type records for all languages, choose the "(all languages)" choice at the top of the list.

Add Translation Button

Whenever the language of the displayed identifier type record is not the same as the selected language, an **Add Translation** button will appear next to the Language Selector. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new identifier type record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way for you to enter translations of existing identifier types. When entering the translated text, be sure not to change the **TAG** value. This data value is used to link the various translation records of the same identifier type together.

List Box

The list box has seven columns: [Tag](#), [Language](#), [Class](#), [Name](#), [Default1](#), [Default2](#), and [Number of Links](#).

You can reorder the identifier types by clicking and dragging lines up or down. The order that identifiers appear on this list determines the order they appear on the drop-down pick list on the Identifiers Page.

For the selected identifier, additional data fields are displayed below.

Tag Column

Each identifier type is identified by its Tag Name during GEDCOM import/export. This provides a language-independent way to identify and transfer identifier information. When entering a new identifier type definition, choose a short tag name that has not been used by another identifier type. By GEDCOM convention, custom tags should begin with an underscore character.

Language Column

The **Language** column displays the language code of the language for the current identifier type record. This value is read-only.

Class Column

Each identifier type belongs to an **identifier class**. The supported identifier classes are:

Prefix
Name
Nickname
Suffix
Identifier
User ID

Select the appropriate identifier class from the drop-down list.

Prefix Class

A **prefix** identifier is a name part that appears before other names. It is used for honorific titles and other initial name parts that come before the given names. A prefix identifier is not considered a full name. There is no "surname" associated with this name type.

Name Class

The **name** class contains all the real individual names. Each name can have a given part, a surname part, or both. The surname can come before or after the given names. The name should be entered in the format that is most common for how it was used.

Nickname Class

The **nickname** class contains names that individuals are known by. In the preferred (composite) name, nicknames are shown in double quotes. Surnames are not included in nicknames.

Suffix Class

A **suffix** identifier is a name part that appears after the given name and surname, and is usually separated from them with a comma. It is used for qualifiers added to names to make them more distinct, such as "Jr.", "fisherman at Broad Cove", or "Duke of Wellington". A suffix identifier is not considered a full name. There is no "surname" associated with this name type.

Identifier Class

The **identifier** class contains identifier types that are not names and not user-assigned identifiers. This can include social security numbers and other national ID numbers.

User ID Class

The **user ID** class contains identifier types that are assigned by users of Genbox and other genealogy database programs. In the preferred (composite) name, user ID names are formatted with square brackets.

Name Column

Enter the distinct name of the identifier type in the **Name** column.

Default1 Column

When a new individual is added to a database, the type of the initial name stored is determined by the setting in the **Default1** column: one identifier type can be marked "default1". Normally, the "birth name" identifier type is marked as the initial default identifier type.

Default2 Column

When additional names are added for an individual, the default identifier type is determined by the setting of the **Default2** column. Normally, the default identifier type for secondary names is "Other name" or "Name variant".

Number of Links Column

The **Number of links** column displays the current number of identifiers for each identifier type. This column is read-only.

Short Name

Enter a short form of the selected identifier type name in this box. This name is used on charts.

Definition

Enter an explanation for how the selected identifier type is used in this box.

Include Label

When **Include Label** is checked, it means identifiers of the selected type should be preceded with a label identifying the type. The label used is the name of the type. The label appears when the name is part of the preferred (composite) name, and also when "all identifiers" is selected for report content. Typically, the "alias", "aka", and "dit" name types are shown with a label.

Hide

Check the **hide** checkbox if the selected identifier type should not appear on the identifier type pick list on the Identifiers Page. By using this option, you can tailor the identifier type pick list to just those types you plan to use. Hidden identifier types have a shaded background in the list box.

Note: marking an identifier type as hidden has no effect on the data. If there are existing identifier records of a type marked hidden, they will continue to display normally.

Deleting an Identifier Type

To delete the selected identifier, including all data values, press the DEL key. You will be prompted to confirm the operation.

If you only wish to delete a particular translation of an identifier type, first set the language selector to "(all languages)".

Note: Some identifier types cannot be deleted.

Data Setup View: Individual Flags Page

Individuals in your database can be marked with **flags**. A flag is a simple marker for a particular yes/no attribute, such as "Living" or "Attended 1992 Reunion". All of the defined individual flags appear as check boxes on the [Individuals View](#), [Attributes page](#).

The **Individual Flags page** on the Data Setup View is used to view/modify the list of individual flag types that have been defined for the current database. This page contains a list box with one row for each flag that can be assigned to an individual, with an additional data field below the list box to enter the definition of the currently selected list item. A language selector and language translation button appear above the list box.

Smythe.GDB: Data Setup

Identifier Types Individual Flags Media Flags Place Flags Defaults Database

Language: English (United Kingdom) * ENG

TAG	Lang	Name	Priv...	# Links
ANCI	ENU	ANCI	<input checked="" type="checkbox"/>	1
BDAY	ENU	Birthday List	<input type="checkbox"/>	0
DESI	ENU	DESI	<input type="checkbox"/>	1
MET	ENU	Have Met	<input type="checkbox"/>	0
HDAY	ENU	Holiday List	<input type="checkbox"/>	0
LIVING	ENU	Living	<input type="checkbox"/>	0
NEWS	ENU	Newsletter	<input type="checkbox"/>	0
NREL	ENU	Non-Relative	<input type="checkbox"/>	0
PROB	ENU	Probable	<input type="checkbox"/>	0

For Selected Individual Flag:

Definition: Researcher is interested in the ancestors of this individual.

Save Cancel

Language Selector

The **Language Selector** selects the desired language of the records to show in the list box.

Regardless of the language selected, the list box will show an entry for every unique individual flag tag that has been defined. When an individual flag has not been defined in the selected language, the record with the "best" language match to the selected language will be shown instead. If the base language of this substitute record is different than the desired base language, the data values will be shown in the secondary font style (normally, this is gray italicized text). The data values will be read-only in this case.

To display individual flag records for all languages, choose the "(all languages)" choice at the top of the list.

Add Translation Button

Whenever the language of the displayed individual flag record is not the same as the selected language, an **Add Translation** button will appear next to the Language Selector. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new individual flag record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way for you to enter translations of existing individual flags. When entering the translated text, be sure not to change the **TAG** value. This data value is used to link the various translation records of the same individual flag type together.

List Box

The **list box** contains one row for each defined individual flag. The list box has five columns: [Tag](#), [Language](#), [Name](#), [Private](#), and [Number of Links](#).

Tag Column

Each flag is identified by its Tag Name during GEDCOM import/export. This provides a language-independent way to identify and transfer flag information. When entering a new flag definition, choose a short tag name that has not been used before.

Language Column

The **Language** column displays the language code of the language for the current individual flag record. This value is read-only.

Name Column

Enter the distinct name of the flag in the **Name** column. Shorter names will display better.

Private Column

The **Private** column contains check boxes. Check the box if the flag is considered private. Private flags will not be output on reports. They can be for your internal use.

Number of Links Column

The **Number of links** column displays the current number of individuals that have this flag checked. This column is read-only.

Definition

Enter an explanation for what the select flag signifies in the **Definition** box.

Deleting an Individual Flag

To delete the selected individual flag, including all data values, press the DEL key. You will be prompted to confirm the operation.

If you only wish to delete a particular translation of an individual flag, first set the language selector to "(all languages)".

Data Setup View: Media Flags Page

Media records in your database can be marked with **flags**. A flag is a simple marker for a particular yes/no attribute, such as "Portrait" or "Favorite". All of the defined media flag types appear as check boxes on the [Media View](#), [Content page](#).

The **Media Flags** page on the Data Setup View is used to view/modify the list of media flag types that have been defined for the current database. This page contains a list box with one row for each flag that can be assigned to a media record, with an additional data field below the list box to enter the definition of the currently selected list item. A language selector and language translation button appear above the list box.

Smythe.GDB: Data Setup

Identifier Types Individual Flags **Media Flags** Place Flags Defaults Database

Language: English (United Kingdom) * ENG

TAG	Lang	Name	# Links
ADULT	ENU	Adults	0
ART	ENU	Artistic	0
BABY	ENU	Babies	0
CHLD	ENU	Children	0
DLOG	ENU	Dialogue	0
FAV	ENU	Favorite	0
MUSIC	ENU	Music	0
NARR	ENU	Narrative	0
OUT	ENU	Outside	0

For Selected Media Flag:

Definition: Shows one or more adults (age 21 or older)

Save Cancel

Language Selector

The **Language Selector** selects the desired language of the records to show in the list box.

Regardless of the language selected, the list box will show an entry for every unique media flag tag that has been defined. When a media flag has not been defined in the selected language, the record with the "best" language match to the selected language will be shown instead. If the base language of this substitute record is different than the desired base language, the data values will be shown in the secondary font style (normally, this is gray italicized text). The data values will be read-only in this case.

To display media flag records for all languages, choose the "(all languages)" choice at the top of the list.

Add Translation Button

Whenever the language of the displayed media flag record is not the same as the selected language, an **Add Translation** button will appear next to the Language Selector. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new media flag record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way for you to enter translations of existing media flag types. When entering the translated text, be sure not to change the **TAG** value. This data value is used to link the various translation records of the same media flag type together.

List Box

The **list box** contains one row for each defined media flag type. The list box has four columns: [Tag](#), [Language](#), [Name](#), and [Number of Links](#).

Tag Column

Each flag is identified by its Tag Name during GEDCOM import/export. This provides a language-independent way to identify and transfer flag information. When entering a new flag definition, choose a short tag name that has not been used before.

Language Column

The **Language** column displays the language code of the language for the current media flag type record. This value is read-only.

Name Column

Enter the distinct name of the flag in the **Name** column. Shorter names will display better.

Number of Links Column

The **Number of links** column displays the current number of media records that have this flag checked. This column is read-only.

Definition

Enter an explanation for what the select flag signifies in the **Definition** column.

Deleting a Media Flag

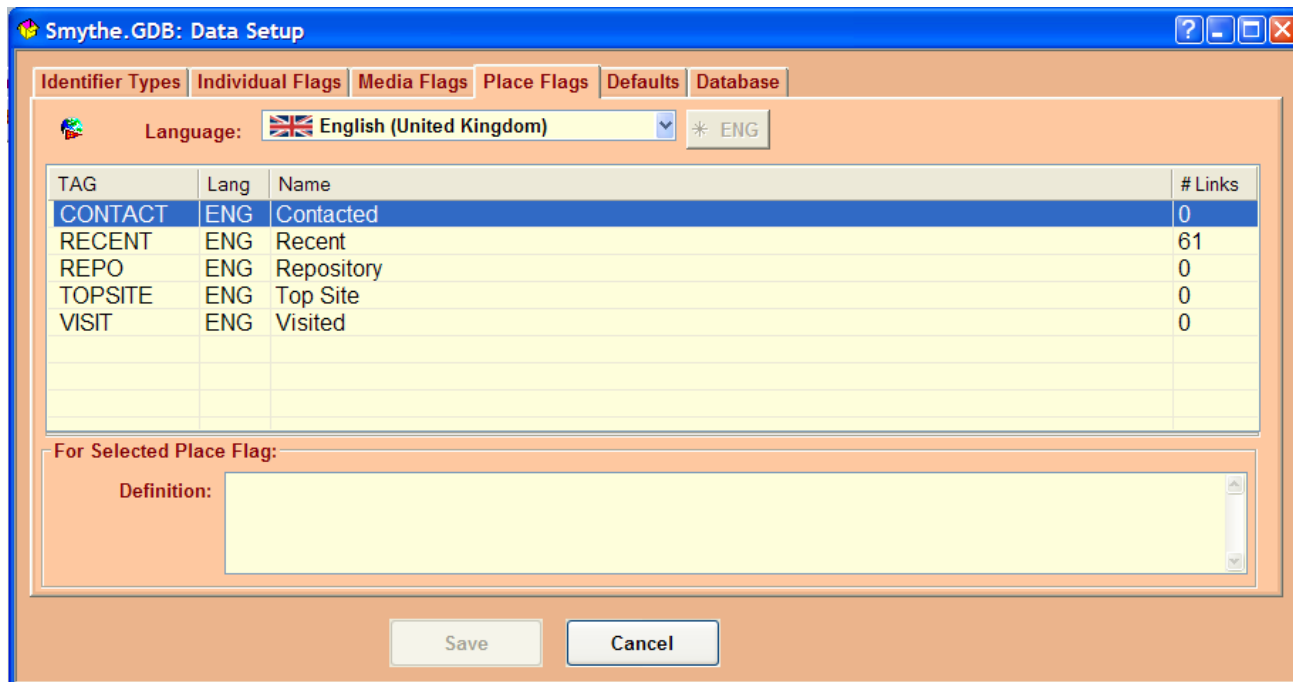
To delete the selected media flag, including all data values, press the DEL key. You will be prompted to confirm the operation.

If you only wish to delete a particular translation of a media flag, first set the language selector to "(all languages)".

Data Setup View: Place Flags Page


Places in your database can be marked with **flags**. A flag is a simple marker for a particular yes/no attribute, such as "Repository" or "Visited". All of the defined flags appear as check boxes on the [Places View](#), [Contact page](#).

The **Place Flags page** on the Data Setup View is used to view/modify the list of place flag types that have been defined for the current database. This page contains a list box with one row for each flag that can be assigned to a place, with an additional data field below the list box to enter the definition of the currently selected list item. A language selector and language translation button appear above the list box.



Smythe.GDB: Data Setup

Identifier Types Individual Flags Media Flags **Place Flags** Defaults Database

Language:  English (United Kingdom) * ENG

TAG	Lang	Name	# Links
CONTACT	ENG	Contacted	0
RECENT	ENG	Recent	61
REPO	ENG	Repository	0
TOPSITE	ENG	Top Site	0
VISIT	ENG	Visited	0

For Selected Place Flag:

Definition:

Save Cancel

Language Selector

The **Language Selector** selects the desired language of the records to show in the list box.

Regardless of the language selected, the list box will show an entry for every unique place flag tag that has been defined. When a place flag has not been defined in the selected language, the record with the "best" language match to the selected language will be shown instead. If the base language of this substitute record is different than the desired base language, the data values will be shown in the secondary font style (normally, this is gray italicized text). The data values will be read-only in this case.

To display place flag records for all languages, choose the "(all languages)" choice at the top of the list.

Add Translation Button

Whenever the language of the displayed place flag record is not the same as the selected language, an **Add Translation** button will appear next to the Language Selector. The label on this button will contain a blue "star" and the missing language code. When this button is clicked, a new place flag record will be copied from the current record, and the language will be set to the currently selected language.

This button provides an easy way for you to enter translations of existing place flags. When entering the translated text, be sure not to change the **TAG** value. This data value is used to link the various translation records of the same place flag type together.

List Box

The **list box** contains one row for each defined place flag. The list box has four columns: [Tag](#), [Language](#), [Name](#), and [Number of Links](#).

Tag Column

Each flag is identified by its Tag Name during GEDCOM import/export. This provides a language-independent way to identify and transfer flag information. When entering a new flag definition, choose a short tag name that has not been used before.

Language Column

The **Language** column displays the language code of the language for the current media flag type record. This value is read-only.

Name Column

Enter the distinct name of the flag in the **Name** column. Shorter names will display better.

Number of Links Column

The **Number of links** column displays the current number of place records that have this flag checked. This column is read-only.

Definition

Enter an explanation for what the selected flag signifies in the **Definition** column.

Deleting a Place Flag

To delete the selected place flag, including all data values, press the DEL key. You will be prompted to confirm the operation.

If you only wish to delete a particular translation of a place flag, first set the language selector to "(all languages)".

Data Setup View: Defaults Page

The **Defaults** page contains miscellaneous database setup items.

The screenshot shows a window titled "Smythe.GDB: Data Setup" with a blue title bar and standard Windows window controls. The window has a tabbed interface with the following tabs: "Identifier Types", "Individual Flags", "Media Flags", "Place Flags", "Defaults" (which is the active tab), and "Database". The "Defaults" tab contains the following fields:

- Current researcher:** A text input field.
- Default indicators for surety levels:** A group box containing three dropdown menus:
 - 3. Assemblage of Evidence:** Set to "almost certainly".
 - 2. Probable Conclusion:** Set to "probably".
 - 1. Marginal Evidence:** Set to "perhaps".
- Database Folder for Media Files ("data"):** A text input field with a browse button (three dots) to its right.

At the bottom of the window are two buttons: "Save" and "Cancel".

Current Researcher

Whenever data is updated, the ID of the **current researcher** is stored to the Researcher ID field in the record. This identifies the person who last updated the record. When you first start Genbox, the current researcher will be set by default to the value stored in the **Current researcher** box on this page.

Default Indicators for Surety Levels

When narrative reports are produced, the surety levels on data can be used to choose the wording that introduces the data. If a place or date value does not have a modifier stored with the data, and the surety is level 1, 2, or 3, the wording shown on this page will be used. You can use these fields to choose the default wording you want to use, then you only need to type in the modifiers on the data fields that you want to be different than the defaults.

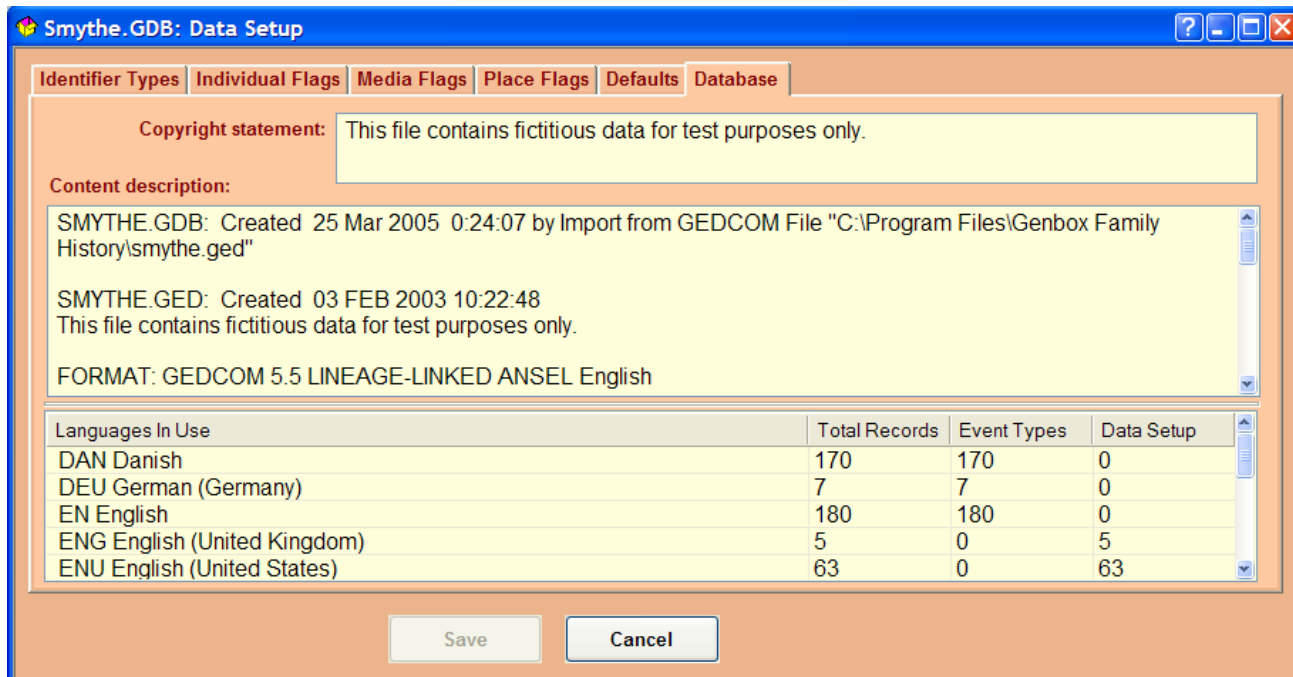
Default Folder for Media Files

For media files that do not have complete paths, this preferred folder will be checked if the media file is not found in the "Preferred" folder, which is set in Preferences. By using relative file paths, it is easy to redirect the location where media files are found to another directory. This data entry box can be used to specify a new path that will be searched for all relative media files in the current database.

If your entered text matches the file prefix of one or more media data records, you will be prompted "Change matching media file names to relative paths?". If you choose Okay, the file prefix on the matching media records will be replaced with the text "data". This will be interpreted by the system as the default folder specified here in data setup.

Data Setup View: Database Page

The **Database** page provides a place to store your comments about the database. It also displays and provides control of the languages stored in the database.



Smythe.GDB: Data Setup

Identifier Types Individual Flags Media Flags Place Flags Defaults **Database**

Copyright statement: This file contains fictitious data for test purposes only.

Content description:

SMYTHE.GDB: Created 25 Mar 2005 0:24:07 by Import from GEDCOM File "C:\Program Files\Genbox Family History\smythe.ged"

SMYTHE.GED: Created 03 FEB 2003 10:22:48
This file contains fictitious data for test purposes only.

FORMAT: GEDCOM 5.5 LINEAGE-LINKED ANSEL English

Languages In Use	Total Records	Event Types	Data Setup
DAN Danish	170	170	0
DEU German (Germany)	7	7	0
EN English	180	180	0
ENG English (United Kingdom)	5	0	5
ENU English (United States)	63	0	63

Save Cancel

Copyright Statement

Enter your copyright statement into this field. It will be included in exported GEDCOM files.

Content Description

Enter any comments you want to store about the database: a description of the contents, where this data originated, why it is interesting, or any other thoughts.

Languages List

A Genbox database can store multiple translations for a number of record types. These record types are:

- Event Types
- Individual Identifier Types
- Individual Flags
- Place Flags
- Media Flags

The Languages List on this page displays one row for each language that is stored in the current database. For each language, it shows the following counts:

- total number of records
- number of event type records (this includes subtypes and roles)
- number of data setup records (this includes identifier types, individual flags, place flags, and media flags)

Deleting All Records for a Language

You can delete all language translations for a language or group of languages:

1. Click a row, or select a range of rows, to indicate which language records you want to delete.
2. Press the **DEL** key.
3. You will be prompted to confirm the operation. Click OK.

Caution: This operation will remove all data records in the current database that are marked for the selected language(s).

Note: Records for the current program language, output language, or base language of either cannot be deleted with this function.

Preferences View

The fonts, colors, and sizes of the windows in Genbox can be customized. The format for dates and names can be selected. Additional operational parameters can also be controlled. These preferences are set on the **Preferences View**.

[Fonts Page](#)

[Windows Page](#)

[Colors Page](#)

[Dates Page](#)

[Names Page](#)

[Operation Page](#)

[Style Page](#)

[Programs Page](#)

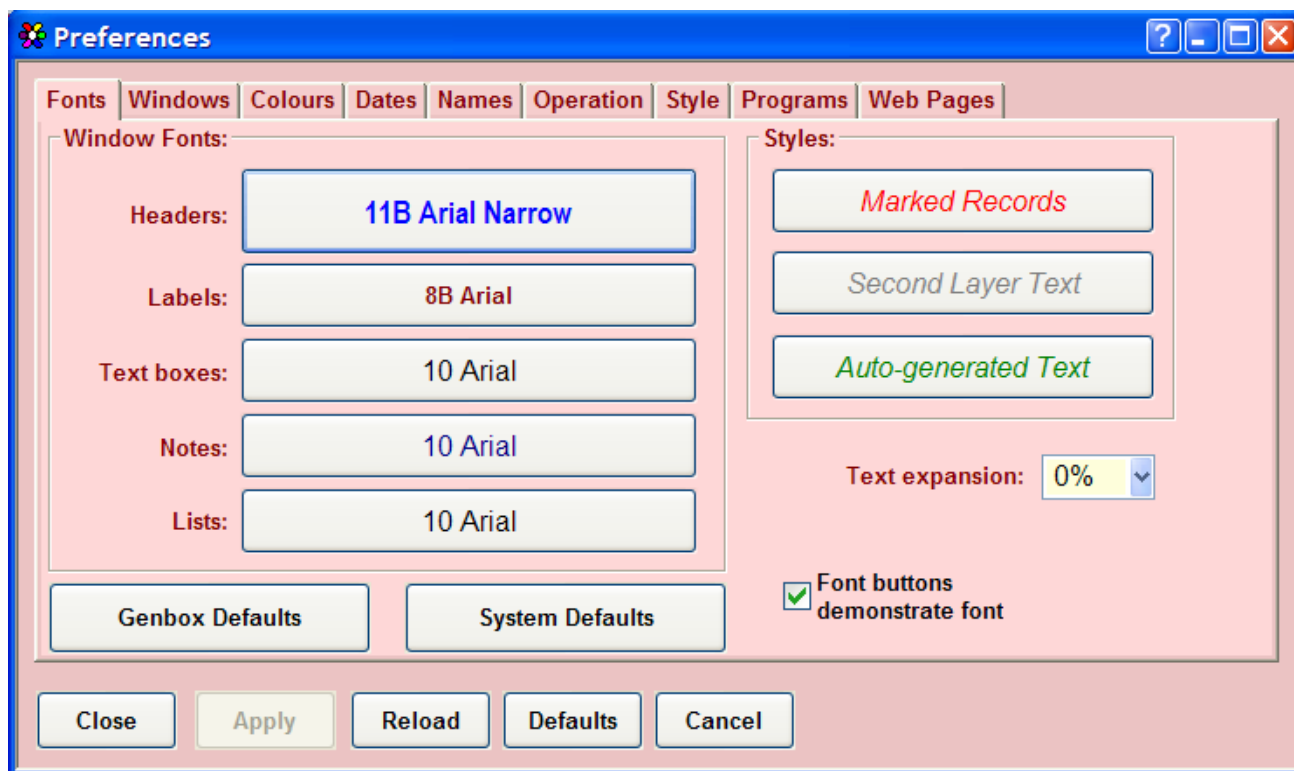
[Web Pages Page](#)

There is a row of buttons at the bottom of the view:

- Click the **Close** button to save changes and close the view.
- Click the **Apply** button to apply the changes to all open windows, and leave the view open.
- Click the **Reload** button to restore preference settings to the way they were when Genbox was started.
- Click the **Defaults** button to reset all preference settings to the way they were when Genbox was delivered.
- Click the **Cancel** button to ignore your changes and close the view.

Preferences View: Fonts Page

The fonts used by Genbox to display the text on the views and other windows can be selected on the **Fonts page**. There are five font buttons for the main fonts, which display the current font settings on the button face. There are three font buttons for styles for special purposes. Clicking a font button will open the [Select Font Dialog](#), where you can change the settings for the font.



Main Fonts:

[Headers Font](#)
[Labels Font](#)
[Text Boxes Font](#)
[Notes Font](#)
[Lists Font](#)

Styles:

[Marked Records](#)
[Second Layer Text](#)
[Auto-generated Text](#)

[Text Expansion Percentage](#)
[Font Buttons Demonstrate Font](#)
[Genbox and System Defaults](#)

Headers Font

The **Headers** font is used in the headers section of view windows. Normally it has a larger font size than the **Text boxes** font.

Labels Font

The **Labels** font is use for text labels on the view windows. Normally it is the same size as the **Text boxes** font, but with bold styling.

Text Boxes Font

The **Text boxes** font is the main font for view windows. It is the font used to display data.

Notes Font

The rich text **Notes** boxes on the data views will use this font. Rich text typically looks better with a serif font, such as Times Roman.

Lists Font

The **Lists** font is used for list boxes on the data views. It will be used for the column headings, and also for the rows if the list is read-only.

Marked Records

Certain data records in Genbox can be **marked**. To indicate when a link is to a marked record, the text will be shown with a special style. This style can be set by clicking the **Marked records** font button. The "marked" style is applied to the font that would normally have been displayed.

Note Only the font styles can be set with the **marked records**, **second layer text**, and **auto-generated text** buttons; the font family and font size will remain the same. Styles include the text color, bolding, and italics. The default marked record style is "red, italic".

Second Layer Text

For certain text boxes throughout the system, there are two types of values. In each case, it would be helpful to have an easy way to distinguish between the two types. The **second layer text** style is used for this purpose. It is applied to the font that would normally have been displayed. Values considered to be of the first type will be shown in the normal font; values considered to be of the second type will be shown with the **second layer text** style applied to the normal font. The default second layer text style is "gray, italic".

Hint Choose a style that is different than the **marked records** and **auto-generated text** font styles.

The **second layer text** style is used in the following places in the system:

- **Individuals View, Summary page:** on the Children list, children of the currently displayed spouse will be shown in the normal font; children of other spouses will be shown in the second layer text style. On the Event list, individual events and family events for the currently displayed spouse will be shown in the normal font; family events with other spouses will be shown in the second layer text style.
- **Individuals View, Events page:** when editing alternate event records, corresponding data values stored in the linked event record will be visible, shown in the second layer text style. Values entered in the alternate event record will be shown in the normal style. This allows you to see where the alternate event record data differs from the linked event record data. You can think of the linked event record as "showing through" or "behind" the alternate event record view.
- **Individuals View, Contact page:** when editing group contact records, the shared text values will be shown in the second layer text style, to remind you that changes made to those fields will affect all individuals in the group. Contact records that are not shared (and the Mailing name field for the current individual, which is never shared) will be shown in the normal text style.
- **Chart Options View, Content and Styles pages:** when viewing content and style settings for Key Individuals, Direct Lines, or Individuals in Lists/Queries, the content and style settings for Default will "show through" wherever a setting in the current set has not been set. This allows you to see what the final result will be for boxes in the current set. Values that have been changed for the current set will be shown in the normal font; the default values that "show through" in the other boxes will be shown in the second layer text style.
- **Citations View, Assertion Page:** when viewing a source citation embedded in a note, all citations embedded in the same note are shown in the Cited Sources List; those that cover the same text range as the current citation are shown in the normal text style; those that are for a different range of text are shown in the second layer text style.

Auto-generated Text

For certain text boxes throughout the system, there are displayed values that have been automatically generated by Genbox and do not represent stored data. The **auto-generated text** style is used to distinguish these "display-only" values from stored data values, which are shown in the normal font style. The default auto-generated text style is "green, italic".

Hint Choose a style that is different than the **marked records** and **second layer text** font styles.

The **auto-generated text** font style is used in the following places in the system:

- **Individuals View, Summary page:** blank basic events in the Event List that have been added according to the "Show blank basic events" preferences option are shown in this style. As soon as you enter a date or place for one of these event rows, the font style will change to the normal style, indicating this is now an actual event record for the current individual.
- **Individuals View, Summary page, Age column and Events View, Age box:** the age at time of event computed by Genbox as the difference between the event date and birth date of the individual are shown in the auto-generated text style. When an "age at time of event" is entered manually, it will be shown in the normal text style and override the auto-generated value.

Text Expansion Percentage

The **Text Expansion Percentage** box lets you specify a percentage increase in the spacing between all controls on the View windows. When nonzero, the spacing of labels, edit boxes, and other controls is expanded. This option is provided for better display of text for international versions, which often require additional space for the translated labels.

Font Buttons Demonstrate Font

Click the **Font buttons demonstrate font** check box if you want the font buttons on all the view windows to format the font description information on the face of the buttons in the selected font. If you are using extremely small or large font sizes, you may wish to clear this check box.

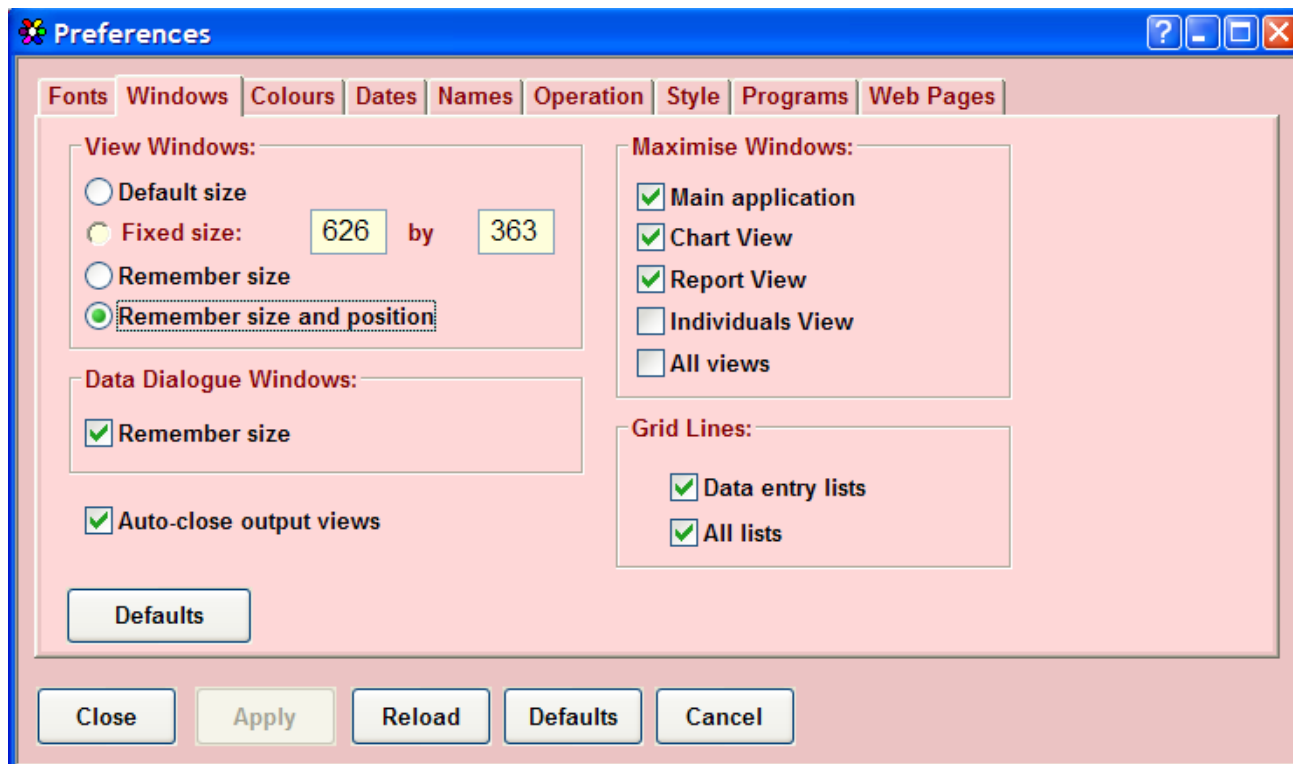
Genbox and System Defaults

There are two buttons for returning the settings on this page to default values:

- Click the **Genbox Defaults** button to set the font settings to program defaults.
- Click the **System Defaults** button to set the font settings to Windows font defaults.

Preferences View: Windows Page

Genbox can display each view window in a standard size, a custom size, or maximized to fill the desktop. Settings for window sizes and positions are set on the **Windows page**.



View Windows

Most view windows have been designed to fit on screens with a minimum resolution of 640 by 480. Some view windows are now designed for a minimum resolution of 800 by 600. With an even larger screen resolution, such as 1152 by 864, you can easily view multiple windows at once. Views can be resized by dragging their borders. This allows you to see more information. The normal behavior is that when the view is closed, this new size is forgotten, and the **default size** will again be used the next time the view is opened. With the **View Windows** group, you can change this default behavior. You can also set the default fixed size for windows. Choices are:

- Default size
- Fixed size
- Remember size
- Remember size and position

When **Default size** is chosen, view windows will be displayed in their default minimum sizes. The default size for most views is 626 by 363. Some views now have larger default sizes: Individuals, Chart Options, Data Setup, Event Types, and Lists.

When **Fixed size** is chosen, the values specified for **fixed width** and **fixed height** are used as the initial size of all of the view windows. These are the values appearing in the two edit boxes to the right of the **Fixed** choice. The default values are 626 (wide) by 363 (high). The sizes are for the interior of the view window; space for window borders will be added to the indicated size.

When **Remember size** is chosen, each view window will return to its previous size when it is reopened, ignoring the **Fixed size** values. This option allows you to individually size each view window to your preference.

View windows normally **cascade** when opened, overlapping the previously opened window but with an offset to the right and down. When **Remember size and position** is chosen, each view window will return to the

same position and size it last appeared on the screen. This option allows you to automatically lay out view windows in a particular arrangement on the screen.

Data Dialog Windows

The modal dialog windows that display data are resizable. When the **Remember size** checkbox is marked, their custom sizing will be remembered the next time they are opened. This applies to the pick dialogs, template preview dialogs, and magnify dialogs.

Maximize Windows

You may prefer to see certain views **maximized**. A maximized view will fill the screen. The choices for maximized views are:

- Main application
- Chart View
- Report View
- Individuals View
- All views

The default is maximized for the main application window, chart views, and report views, and not maximized for the other views.

Grid Lines

List boxes appear throughout the system: they have labeled columns with multiple rows appearing in a box. You may prefer to see **grid lines** that show the divisions into columns and rows. The grid lines can make easier it scan along a row or down a column in a list box.

There are two kinds of list boxes in Genbox: those that can be used to enter/modify data, and those that are for viewing/selection only. Click **Data entry lists** to enable grid lines on data entry list boxes. Click **All lists** to enable grid lines on all list boxes in the system.

Auto-close Output Views

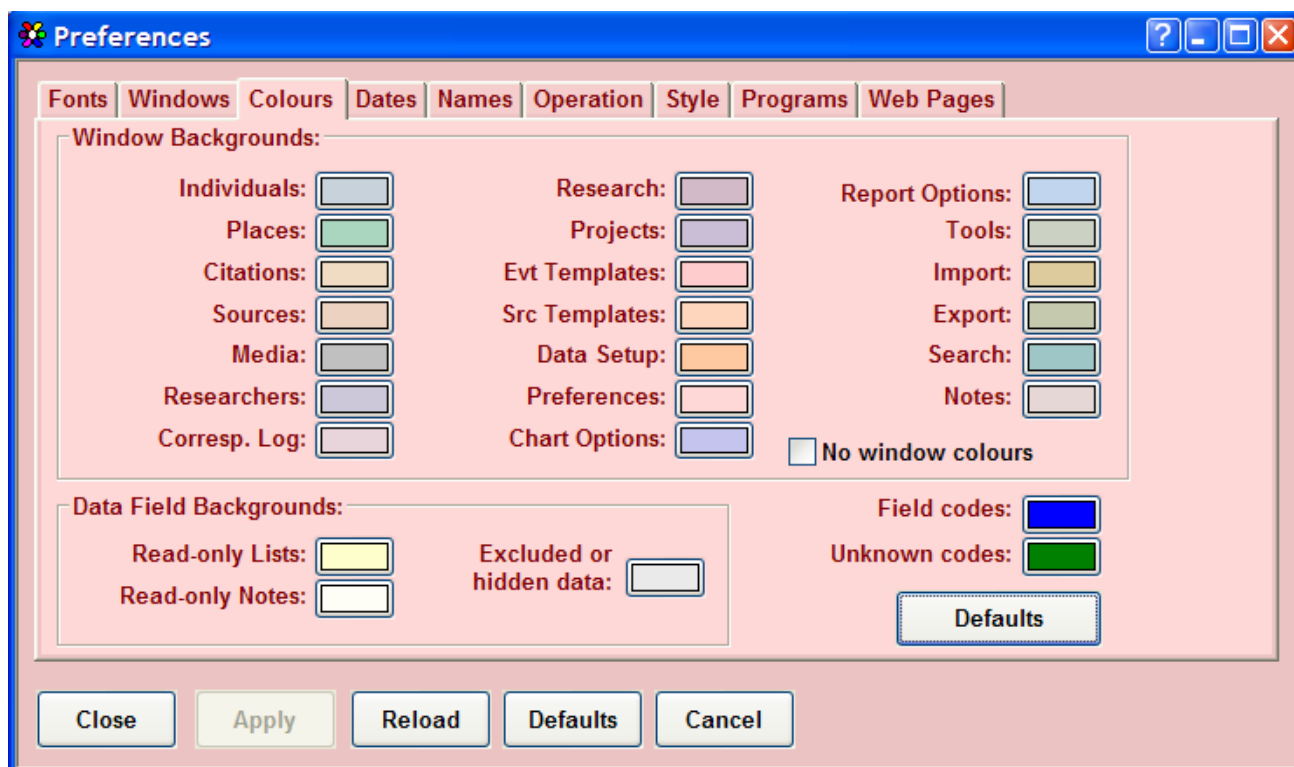
When this option is checked, the "Make Chart" and "Make Report" buttons on the Chart Options View / Report Options View will first close a previously made chart/report, if not closed already, before opening a view window for the new chart/report. The default is "checked".

Defaults

Click the **Defaults** button to restore all the window sizes and positions to Genbox default values.

Preferences View: Colors Page

Genbox can display the view windows in different colors. This makes it easier to identify what type of data each view is showing, particularly when multiple views are open at once. Settings for window colors are set on the **Windows** page.



Window Backgrounds

Genbox can display the view windows in different colors. This makes it easier to identify what type of data each view is showing, particularly when multiple views are open at once. There are 20 **color buttons**, each for a different view window. Click a color button to open the [Select Color Dialog](#) to change the color of the corresponding view.

No Colors Check Box

If you prefer to see all the view windows in standard gray, click the **No colors** check box. This setting may be helpful when using a limited display device. The color choices will be remembered and restored when the **No colors** check box is later cleared.

Read-only Lists

Some list boxes in Genbox are read-only. To make this restriction apparent, the background of the box can be shaded. The default color for read-only list boxes is light yellow.

Read-only Notes

When a notes box has been toggled to show field values instead of field codes, the box is in read-only mode. To make this restriction apparent, the background of the box can be shaded. The default color for read-only note boxes is an off-white (ivory).

Excluded or Hidden Data

Some data records in Genbox can be marked "excluded". Also, some individual data items can be marked "hidden". To make these settings apparent, the background of the data items can be shaded. Excluded records will have the ID box shaded. The default color for excluded or hidden data is a light gray.

Field Codes

Field codes that appear in notes, event templates, and source citation formatting can be automatically colored to distinguish them from data. The **Field codes** button is used for this purpose. Genbox field codes always appear in [square brackets]. Field code coloring is only used for preview within the program; program output (charts and reports) is unaffected. When a note or event template has been toggled to display field values, the field values will also be colored. The default color for field codes is blue.

Unknown Codes

Unknown field codes that appear in notes, event templates, and source citation formatting can be automatically colored in a different color than recognized field codes. This makes it easy to identify when you have mistyped a field code. The **Unknown codes** color button is used for this purpose. Unknown field code coloring is only used for preview within the program; program output (charts and reports) is unaffected. When an unknown field code is encountered on a report, it will be output to the report as normal text. This means that when you have text in square brackets that is not a field code and is intended to be displayed, such as "[sic]" or "[editor]", you don't need to use the backslash escape characters in order to have the brackets printed. The bracketed text will be colored in the "unknown code" color within the program, but the coloring will not interfere with the output. The default color for unknown field codes is a dark green.

Defaults

Click the **Defaults** button to restore all the window colors to Genbox default values.

Preferences View: Dates Page

Dates are an important part of genealogy. The **Dates page** allows you to control how dates are formatted on the display and on charts and reports.

Long Dates and Short Dates

Genbox formats dates using one of two date formats, depending on where the dates appear throughout the system:

- **Long dates** are used when space is not limited, as on the Events page.
- **Short dates** are used when space is limited, as when dates appear as a column on a list view.

Charts and reports can optionally be set to user either long date or short date formatting. Charts use short dates by default, while most reports use long date formatting by default.

Date Format

You can set date format independently for long dates and short dates. The **long** and **short** sample boxes show the results of your date format choices, for a sample long date and short date.

- Click the **Long** button to view/select settings for long date format.
- Click the **Short** button to view/select settings for short date format.

Dates have three parts: the day, the month, and the year. Your preference for ordering the parts can be selected from the **Order** box:

Day Month Year
Month Day Year
Year Month Day

The selected ordering will be used when displaying dates on the screen and charts and reports. It will also be the assumed order when dates entered into the system are ambiguous.

The **Day** box lets you choose whether a leading zero is included for day numbers less than 10.

The **Separator1** and **Separator2** boxes let you choose the separating character, if any, between the first and second parts, and between the second and third parts. You can type in your own character, or choose from slash, dash, period, or comma.

The **month** box lets you choose the format for the month part. The sample month "February" is shown with the formatting applied, which in each case is a combination of abbreviation, capitalization, and punctuation:

FEbruary
February
FEB
Feb
feb
FEB
Feb
feb
02
2

Default Century

When dates are entered with two-digit years, the **Default century** value will be added to produce a 4-year date.

Double Dates

When **Automatic double dates** is checked, dates entered with a year between 1583 and the specified **Cutoff year** (default is 1752) that occur between January 1 and March 24 will be changed automatically into **double date format**. See the section [Double Date Format](#) for a discussion of double dates.

Typically, the cutoff year is set to the year that the country of your ancestors switched to the Gregorian calendar. If you have double dates from multiple countries, change the cutoff year to be later than the latest double date.

You can also manually enter double dates, for any year after 1582, regardless of the current setting for cutoff year.

Living Individuals

There is an option on charts and reports to restrict the inclusion of data for **Living individuals**. For individuals that have a date of death entered, or have the **Living** check box checked, the living status is known. Otherwise, the program will make a decision on whether to consider an individual as living based on birth date and the age value entered in the **Living Age** box on this page (default is 100).

Date Labels

Date values can be qualified with words like "about", "estimated", "before", and "after". They can be a span, such as "from 1861 to 1865". They can be range of possible dates, such as "between 12 April 1745 and 27 June 1745". There are eight types of qualifications that are understood by the program for purposes of sorting dates. The labels used can be selected for each, and two sets of selections can be made: a "Short label" set for use with short dates, and a "Long label" set for use with long dates. The **Long** and **Short** buttons can be pressed to select which set of labels to view/change.

The label choices are:

Qualifier Type	Label Choices
About	about, abt, a, circa, cir, ca, ~
Est	estimated, est, say
Cal	calculated, calc, cal

Before	before, bef, <
After	after, aft, >
Span	from .. to .. , frm .. to .. , .. to .. , .. – .. (reports only)
Range	between .. and .. , between .. & .. , bet .. and .. , bet .. & .. , .. – ..
BC / AD	B.C. A.D., BC AD, B.C.E. C.E., BCE CE

Note When selected, the ".. – .." **Span** choice will only be used on reports; the ".. to .." choice will be used on the screen. Entry of dates in the ".. – .." format will always be interpreted as a **Range** qualifier.

Show Christening when Birth Unknown

Click this check box to allow christening or baptism event dates to be used on charts and reports in place of birth event dates when birth event information is missing.

Show Burial when Death Unknown

Click this check box to allow burial event dates to be used on charts and reports in place of death event dates when death event information is missing.

Show Since/Until for Incomplete Spans

When checked, the qualifier "since" will be shown on a date span missing the ending date in place of "from", and the qualifier "until" will be shown on a date span missing the starting date in place of "to". This is an output formatting option which does not affect how data is stored or entered. Examples:

John has resided at 2984 Maplewood Ave, Family Village, Iowa **since May, 1964**.
 Carl worked at the brewery **until December, 1941**.

This option is checked by default.

Defaults Button

The **Defaults** button will reset the preferences on this page to their default values.

Preferences View: Names Page

The display and data entry options for individual names and place names are selected on the **Names page**.

Note The display and data entry options available for individual names apply to names viewed and entered on the Summary page and in other secondary reference fields in Genbox. Names displayed and modified on the Identifiers page will appear exactly as entered.

Preferences

Fonts Windows Colours Dates **Names** Operation Style Programs Web Pages

Display:

Individual Names:

☐ Mark surnames with /Slashes/

☒ Show surnames in UPPERCASE

☐ Show ID numbers after names

Prefix: () Suffix:)

☒ Show birth-death years

Place Names:

☐ Show commas for missing levels

☐ Show place levels after names

Data Entry:

Individual Names:

☒ Confirm new individuals

☐ Convert to initial caps

☒ Process embedded names

Place Names:

☒ Confirm new places

☐ Convert to initial caps

Search:

Individual Names:

☐ Ignore diacritics

Close Apply Reload Defaults Cancel

Display Settings - Individual Names:

[Mark surnames with /Slashes/](#)
[Show surnames in UPPERCASE](#)
[Show ID numbers after names](#)

Display Settings - Place Names:

[Show commas for missing levels](#)
[Show place levels after names](#)

Data Entry Settings - Individual Names:

[Confirm new individuals](#)
[Convert to initial caps](#)
[Process embedded names](#)

Display Settings - Place Names:

[Confirm new places](#)
[Convert to initial caps](#)

Search - Individual Names:

[Ignore Diacritics](#)

Mark Surnames with /Slashes/

When checked, surnames will be shown with a slash character before and after the surname. This can help identify the surname portion in names that have nonstandard part order or multi-word surnames.

Note On the Identifiers page, slashes are always shown around surnames, for name types that can have surnames. The Name box on the Summary page also shows slashes around surnames regardless of this preferences setting.

Show Surnames in UPPERCASE

When checked, surnames will be shown capitalized. This can help identify the surname portion in names that have nonstandard part order or multi-word surnames.

Show ID Numbers After Names

All individual records in the database have a unique numeric ID value. Sometimes it is helpful to see these ID values after each name reference, particularly when several people in the database have similar names.

When checked, you can type a character into the **Prefix** and **Suffix** boxes to delimit the ID value. Normally parentheses are used, producing name references like "John Smythe (3641)".

Confirm New Individuals

When checked, a message box will appear each time an unrecognized individual name is typed into a secondary reference box, prompting whether a new individual by that name should be added to the database.

Individual Names: Convert to Initial Caps

When checked, each word of newly entered individual names will be formatted with a leading capital letter and the rest lowercase. This option helps to correct inconsistency in letter case during entry. It is particularly useful in formatting names imported from a GEDCOM file where all or some of the names are in uppercase. Because Genbox can selectively show surnames in uppercase, the data itself does not need to be stored that way.

This function can handle a number of exceptional cases, including names like "McDonald".

Hint If you find that the function did not capitalize an unusual name correctly, go to the Identifiers page where you can type in names exactly as they should appear.

Process Embedded Names

When checked, names that are "embedded" within newly entered individual names will be identified and removed to separate name records. The removed names will be marked as "preferred", so that the resulting composite name will appear virtually the same as the text originally entered. The types of embedded names that can be recognized are:

- Nicknames: names placed within double quotes
- Suffixes: portions following a comma
- Other names: names placed within parentheses
- Aliases: names following the words "alias" and "aka"

Advantages of removing the embedded names to separate name records include:

- Each name can be independently documented with source citations, a defining event, and notes.
- Nicknames that have been identified can be used on narrative reports.
- Charts and reports can selectively display names of specific types.
- The composite name can easily be changed by clicking on the "Preferred" checkmarks for each name.

Hint If you need to store parentheses or double quotes as part of name, go to the Identifiers page, where you can type in names exactly as they should appear.

Show Commas for Missing Place Levels

When checked, commas will be inserted into place names for skipped place levels. For example, if a place name of "Chicago, Illinois" was typed, it would be displayed as "Chicago,,, Illinois", which indicates that the township level and county level names were omitted.

Show Place Levels After Names

When checked, the level numbers of the name parts will be shown after each place name in parentheses. This can be helpful when working with places, because sometimes the place levels for each part are not obvious. For example:

Springfield, Sangamon County, Illinois, United States (2-456)

Each number corresponds to a part name: here, "2" is the level number for "Springfield" (indicating it is at the city level); "4" is the level number for "Sangamon County" (indicating it is at the county level).

When [Show Commas for Missing Place Levels](#) is also set, a dash is displayed for an empty level, as shown for the "Township" level above.

Confirm New Places

When checked, a message box will appear each time an unrecognized place name is typed into a secondary reference box, prompting whether a new place by that name should be added to the database.

Place Names: Convert to Initial Caps

When checked, each word of newly entered place names will be formatted with a leading capital letter and the rest lowercase. This option helps to correct inconsistency in letter case during entry. It is particularly useful in formatting names imported from a GEDCOM file where all or some of the place names are in uppercase.

This function can handle a number of exceptional cases, including names like "McDonald".

Hint If you find that the function did not capitalize an unusual place name correctly, go to the Places Names page where you can type in names exactly as they should appear.

Ignore Diacritics

When checked, the Ignore Diacritics checkbox on the [Individuals Pick Dialog](#) will be checked by default.

Preferences View: Operation Page

The default choices for a number of operational parameters are specified on the **Operation** page.

The screenshot shows the 'Preferences' dialog box with the 'Operation' tab selected. The dialog has a blue title bar and a pink background. At the top, there are tabs for 'Fonts', 'Windows', 'Colours', 'Dates', 'Names', 'Operation', 'Style', 'Programs', and 'Web Pages'. The 'Operation' tab is active, showing various settings:

- System Startup:** A checkbox for 'Restore open databases' is checked.
- First Individual:** Two radio buttons: 'Last viewed' (unchecked) and 'Home ind.' (checked).
- Units:** Two radio buttons: 'English' (checked) and 'Metric' (unchecked).
- Languages:** A section with a checked checkbox 'Choose from installed/in use only'. Below it are two dropdown menus: 'Program' and 'Output', both set to 'English (United Kingdom)' with a UK flag icon.
- Individuals View Summary:** A section with four checkboxes: 'Show blank basic events' (unchecked), 'Sort basic events first' (unchecked), 'Hide non-basic attributes' (checked), and 'Allow place column overflow' (unchecked).
- Report Options File for Preview Dialogues:** A text field with a yellow background and a browse button ('...').
- Preferred Folder for Media Files ("pref"):** A text field with a yellow background and a browse button ('...').
- Editing enabled:** Two radio buttons: 'Editing enabled' (checked) and 'View only' (unchecked).
- Enable video previews:** A checked checkbox.

At the bottom of the dialog are five buttons: 'Close', 'Apply', 'Reload', 'Defaults', and 'Cancel'.

System Startup

Check **Restore Open Databases** to begin each Genbox session by opening the databases that were open the last time Genbox was closed.

Data Entry

Data entry can be set to **Enabled** or **View only**.

With the **Enabled** setting, data can be entered simply by typing the new data in the appropriate edit box. Editing is "always active" in the sense that you do not need to first activate a special "edit mode" or separate data entry window. Changes are also saved automatically.

With the **View only** setting, Genbox will not permit data entry. Attempts to type into data text boxes will have no effect. Other types of controls that are also bound to data, such as check boxes and radio buttons, may appear to accept input, but changes are not saved to the record when you move to a different record. The database file is set to read-only mode. Data imports are also disabled.

With view only mode, you can continue to view all of the data, produce charts and reports, perform queries, and export data. You can explore Genbox, clicking and typing, while feeling secure that you will not inadvertently alter any data.

First Individual

Check **Last viewed** to automatically move to the record on the Individuals View that was last viewed when the database is first opened.

Check **Home individual** to automatically move to the designated home individual when the database is first opened.

Units

Measurements displayed throughout Genbox can be shown in **English** or **Metric** units, depending on this selection.

Individuals View Summary

Check **Show blank basic events** to have the event types marked with the "basic" flag to appear automatically in the Events List on the [Individuals View Summary Page](#). This option is convenient when entering data for new individuals on the Summary Page, because you do not need to select the event types for the new records first. You can begin immediately by typing the dates and places for the basic events into the appropriate blanks. When a basic event shown in the list is blank, it will be shown in the **auto-generated text** font style. As soon as data is entered, the event record will be stored to the database and the font style will switch to the normal font style.

Check **Sort basic events first** to have events that are basic appear first in the Events List on the [Individuals View Summary Page](#). This option makes it easy to see this essential information when browsing through individual records. Normally, all events are sorted in chronological order.

Check **Hide non-basic attributes** to hide attribute events from the list of events on the [Individuals View Summary Page](#). Attributes often do not have an associated date or location value, so their appearance on the Summary page may not be desirable. When this option is checked, the display includes only the "real" events. Other page displays are not affected.

Check **Allow place column overflow** to make better use of screen space on the [Individuals View Summary Page](#). Whenever there is no value for the "subject" of an event, this option allows long place names to "overflow" the place column and also occupy the space in the subject column. This makes them easier to read. Note: if **grid lines** are enabled for data entry lists, this feature is disabled.

Enable View Previews

When **Enable Video Previews** is checked, videos that are linked to data records as the primary media will automatically be loaded when the linked data record is shown. The frame selected for the preview position will be displayed. If this option is not selected, videos will not be loaded until the **Play** button is clicked, and the media button will appear blank until then.

A video must be loaded in order to access its preview frame, and loading videos can take several seconds. You may wish to clear this checkbox to avoid these delays.

Report Options File for Preview Dialogs

On the [Individuals View, Events page](#), the [Event Template Preview Dialog](#) and [Event Witness Template Preview Dialog](#) allow you to preview the formatting of events before you generate a full report. The formatting includes any footnotes. The preview text is formatted according to the **Report options file for preview dialogs**. You can type the name of the file, or click the "..." button to select it from the File Open Dialog.

Preferred Folder for Media Files

For media files that do not have complete paths, this preferred folder will be checked first. By using relative file paths, it is easy to redirect the location where media files are found to another directory.

If your entered text matches the file prefix of one or more media data records, you will be prompted "Change matching media file names to relative paths?". If you choose Okay, the file prefix on the matching media records will be replaced with the text "pref". This will be interpreted by the system as the preferred folder specified here in preferences.

Languages

The **languages** shown in the program and on output (charts and reports) can be independently selected.

- Use the **Program** language selector to select the language for the program.
- Use the **Output** language selector to select the language that should be used when generating charts and reports.

Some languages include a flag icon for the nation associated with the language. These flag icons will also be shown in the status bar.

The language choices available on the language selectors can include the full set of languages currently installed in the Windows operating system. Or, you can check **Choose from installed/in use only**, in which case only languages for which a Genbox resource file has been installed (or for which data records have been defined) will appear on the dropdown language selectors throughout the program.

Note: language support for most languages is not complete. Selecting a program or output language tells the program the desired language. Text will be in that language when resources are available; otherwise another language resource will be substituted.

Language Support

Support for multiple languages is being added to Genbox in stages. Currently, the following data items have been translated or support multiple languages:

- **Month names, weekday names.** This affects the display of dates and the text on Calendar reports.
- **Pronouns, prepositions, conjunctions.** These and other "closed class" words are used on charts and reports.
- **Event types.** The event types have been enabled for multiple languages. Genbox is distributed with a varying number of translated event type for some languages. Users can add their own translations as needed.
- **Identifier Types, Individual Flags, Place Flags, Media Flags.** These records on the Data Setup View support multiple languages.
- **Program menus, windows, dialogs, and messages.** Genbox is distributed with resource files for English (United States), English (United Kingdom), and a number of other languages. More languages will be made available in the future.
- **This Help file:** currently in English only.
- **User's Manual:** (in development)

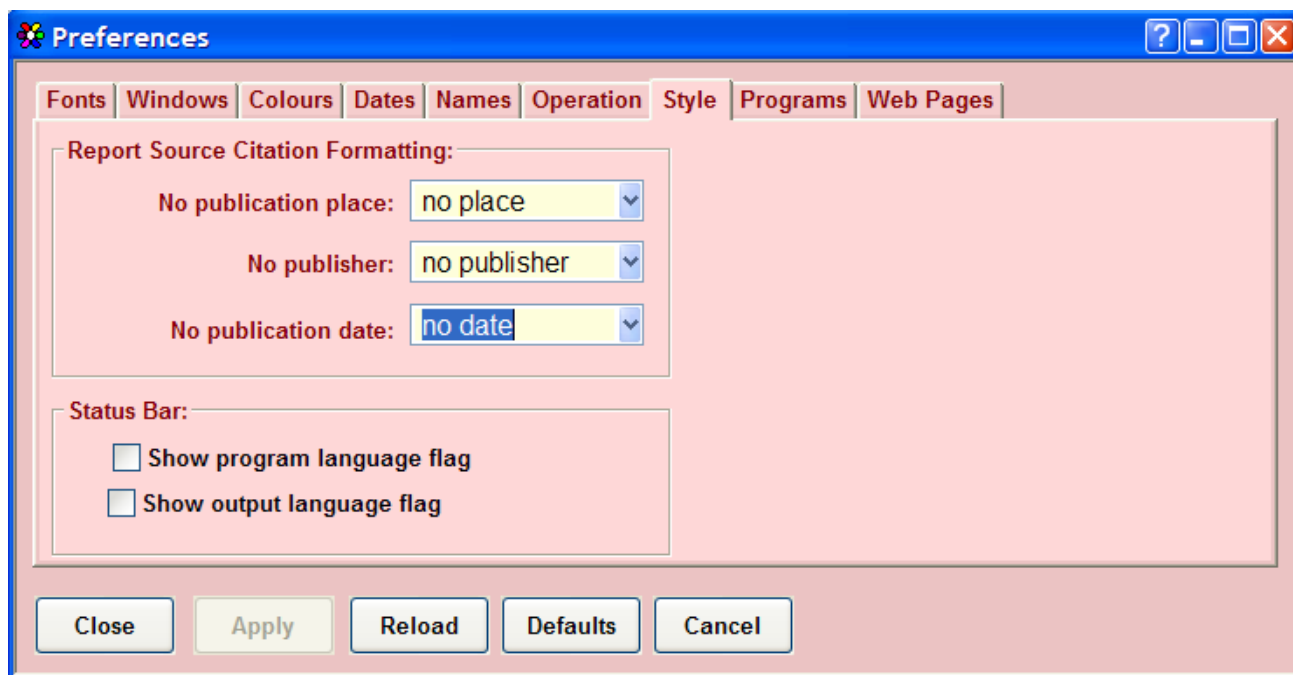
Resource files distributed with Genbox may include:

- GenboxENU.dll English (United States)
- GenboxENG.dll English (United Kingdom)
- GenboxAFK.dll Afrikaans
- GenboxCSY.dll Czech
- GenboxDAN.dll Danish
- GenboxNLD.dll Dutch (Netherlands)
- GenboxNLB.dll Dutch (Belgium)
- GenboxFIL.dll Filipino
- GenboxFRA.dll French
- GenboxDEU.dll German
- GenboxHUN.dll Hungarian
- GenboxITA.dll Italian
- GenboxNOR.dll Norwegian (Bokmal)
- GenboxNNO.dll Norwegian (Nynorsk)
- GenboxPLK.dll Polish
- GenboxPTB.dll Portuguese (Brazil)
- GenboxPTG.dll Portuguese (Portugal)
- GenboxRUS.dll Russian
- GenboxSKY.dll Slovak
- GenboxSLV.dll Slovenian
- GenboxVIT.dll Vietnamese

When a resource file for the selected program language cannot be found, a warning message will be presented. Most program text will not be shown translated in this case.

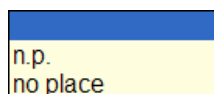
Preferences View: Style Page

The default choices for a number of report style settings are specified on the **Style page**.



No Publication Place

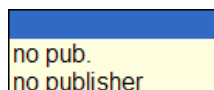
The **No publication place** dropdown list controls formatting citation text for missing publication place data in a source record. Default choices are:



You can also type in your preferred text.

No Publisher

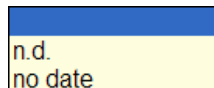
The **No publisher** dropdown list controls formatting citation text for missing publisher data in a source record. Default choices are:



You can also type in your preferred text.

No Publication Date

The **No publication date** dropdown list controls formatting citation text for missing publication data in a source record. Default choices are:



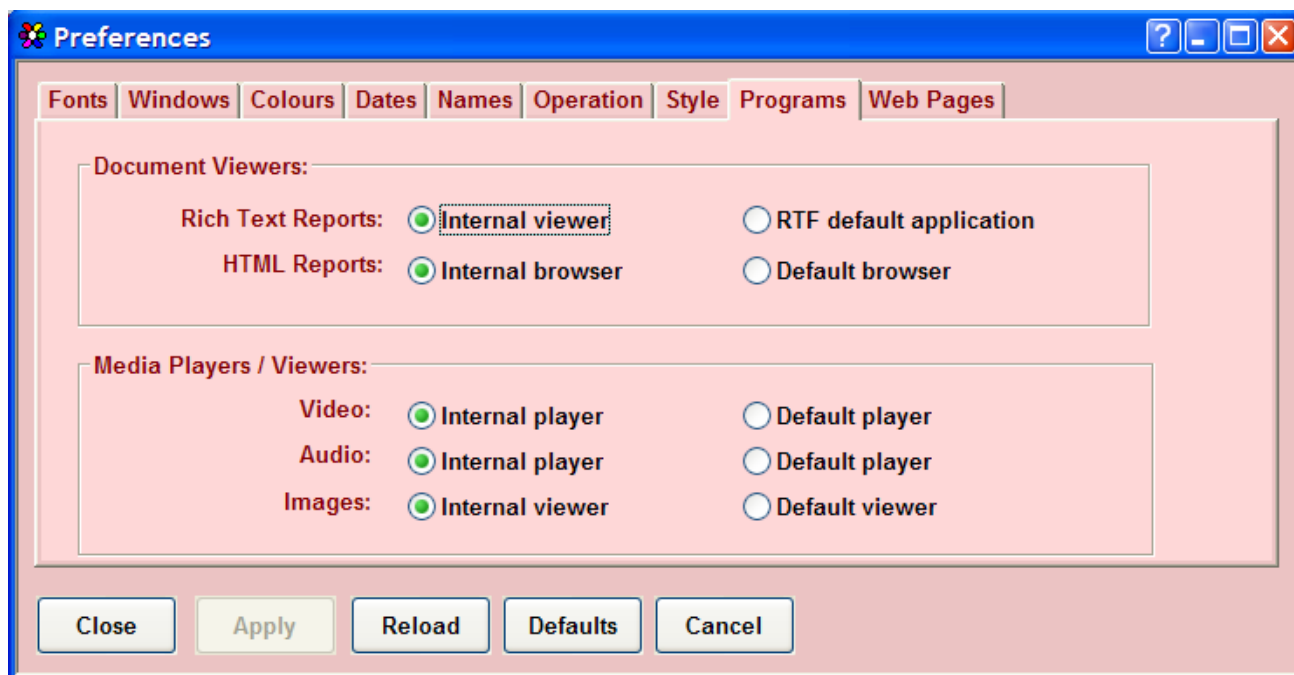
You can also type in your preferred text.

Show Program Language Flag, Show Output Language Flag

The flag icons that appear on the status bar can be removed by clearing these check boxes.

Preferences View: Programs Page

Genbox includes built-in viewers and players for the data types it supports. You can also specify that the external, system default viewer or player be used for specific data types. This selection is performed on the **Programs Page**.



Rich Text Reports

When **Internal viewer** is selected, generated reports in RTF format will be displayed within Genbox, on the [Report View](#). This view allows you to scroll and zoom, and add annotations. When **RTF default application** is selected, generated reports will open directly in your default rich text application, such as Microsoft Word or Corel WordPerfect. There, you will have full edit and reformatting capabilities.

HTML Reports

When **Internal browser** is selected, generated web pages will be displayed within Genbox, on the [Web Page View](#). This view acts like a normal browser, with some added paging capabilities. When **Default browser** is selected, generated web pages will open directly in your default web browser, such as Internet Explorer or Netscape.

Video Player

When **Internal player** is selected, video media files will be played with the player within Genbox. When **Default player** is selected, video files will be played in your default media player, such as Windows Media Player or Quicktime.

Audio Player

When **Internal player** is selected, audio media files will be played with the player within Genbox. When **Default player** is selected, audio files will be played in your default media player for audio, such as Windows Media Player or RealAudio.

Image Viewer

When **Internal player** is selected, image media files will be viewed with the "Show Media Dialog" in Genbox. When **Default viewer** is selected, image files will be viewed in your default media player for images, such as Windows Media Player.

Preferences View: Web Pages Page

The default choices for web page creation are specified on the **Web Pages** page.

Preferences

Fonts Windows Colours Dates Names Operation Style Programs **Web Pages**

Local folder: ☐ Prompt

File prefix: ☐ Prompt

Existing files: ☒ Confirm

Home page URL:

Text:

Close Apply Reload Defaults Cancel

Local Folder

Generated web pages will be stored to the location specified in the **Local folder** box. The location should be a path to a directory on a local drive. When the **Prompt** check box is checked, you will be prompted each time a Web Page report is produced for the output location, with the specified location as the default.

File Prefix

Generated pages can all begin with the same filename prefix. A filename prefix helps to organize related files. The prefix can be specified in the **File prefix** box. You can type a literal string, or you can type a **template**. Available template codes for web page prefixes are:

Template Code	Description
[KEY]	The initials of the key individual on the report.
[TYPE]	The type of report being produced.

The box has a drop-down list with some predefined file prefix templates:

(none)

[KEY]

[TYPE]

[KEY] [TYPE]

[SHORTTYPE]

[KEY][SHORTTYPE]

Existing Files

Typically, web page reports will be produced in successive drafts, as more data is entered or various report options are tried. Because web pages are stored as files, there is the issue with what to do with the files created from previous drafts that have the same filename prefix. The **Existing files** box provides the following choices:

Remove all in folder
Remove all matching prefix
Overwrite

When **Overwrite** is chosen, it is possible to end up with a combination of new and old draft web pages with the same prefix, when there are fewer new pages than old pages.

You can click the **Confirm** check box if you want a message box prompting you to confirm the deletions.

Home Page URL and Text

Generated web pages can include a link to another web page of your choice. It can be specified in the **Home page URL** box. Type the name for the link in the **Text** box, such as "Home".

Chart Options View

Genbox can produce **charts** of your genealogical data. Unlike a report, which is a text document, a chart is a graphical representation that is drawn on the screen or printer. Genbox produces five general types of charts:

- [Ancestor](#)
- [Descendant](#)
- [Related](#)
- [Convergent](#)
- [Everyone](#)

There are many options for each chart type, organized onto eleven pages:

[Key Page](#)
[Titles Page](#)
[Sections Page](#)
[Layout Page](#)
[Contents Page](#)
[Styles Page](#)
[Detail Page](#)
[Links Page](#)
[Format Page](#)
[Sizes Page](#)
[Frames Page](#)

There is a row of buttons at the bottom of the view:

- Click **Make Chart** when you are ready to produce the chart.
- Click **Save Options** to save your settings to a named options file that you can load again later. You will be prompted to select a filename.
- Click **Reload** to restore the settings to the way they were the last time the options file was saved.
- Click **Defaults** to reset all of the settings to Genbox defaults for the current chart type. The defaults are the same options as used by the **Basic** menu choice.
- Click **Close** when you are done with the Chart Options View.

Make Chart Button

When you choose **Make Chart**, a progress window will be displayed, then the [Chart View](#) will open and display the generated chart. The **Chart Options View** will still be open, but it will be behind the Chart View. After you close the Chart View, you will see the Chart Options View again. You can make further changes to the options, then choose **Make Chart** again. You can repeat this cycle until you are satisfied with your chart. Then click the **Close** button to close this view.

Save Options Button

There are a lot of chart options that you can set. After you have the options the way you prefer, you can save them so that you can quickly produce more charts with the same options later. When you click **Save Options**, the "Save As..." file dialog will appear. The default filename shown on this dialog will be the current filename of the options file, if any. If you want to save your changes back in the same file, click OK. Otherwise, enter a new name for the options file.

Reload Button

Genbox makes it easy for you to experiment with different chart options. When you close the Chart Options View, your changes will be remembered throughout the current session. This means you can do other things, such as select a different current individual on the Individuals View, then select your same chart options file from the menu again, and the changes you made will still be there. This makes it easy to try out your options with different individuals as keys.

Sometimes you will decide you want to get rid of all the changes you made, and restore the options to the way they were when you started. You can do this by clicking the **Reload** button: the chart options will be reloaded from the file, so the settings will be restored to the way they were the last time the options were saved. This also happens whenever you exit Genbox and restart the program.

Defaults Button

Click the **Defaults** button to reset all of the settings to Genbox defaults for the current chart type. The defaults are the same options as used by the **Basic** menu choice: it produces a plain-looking chart; no colors, no drop shadows, minimal data content. It provides a good starting point when you want to create a new options file from "scratch".

Close Button

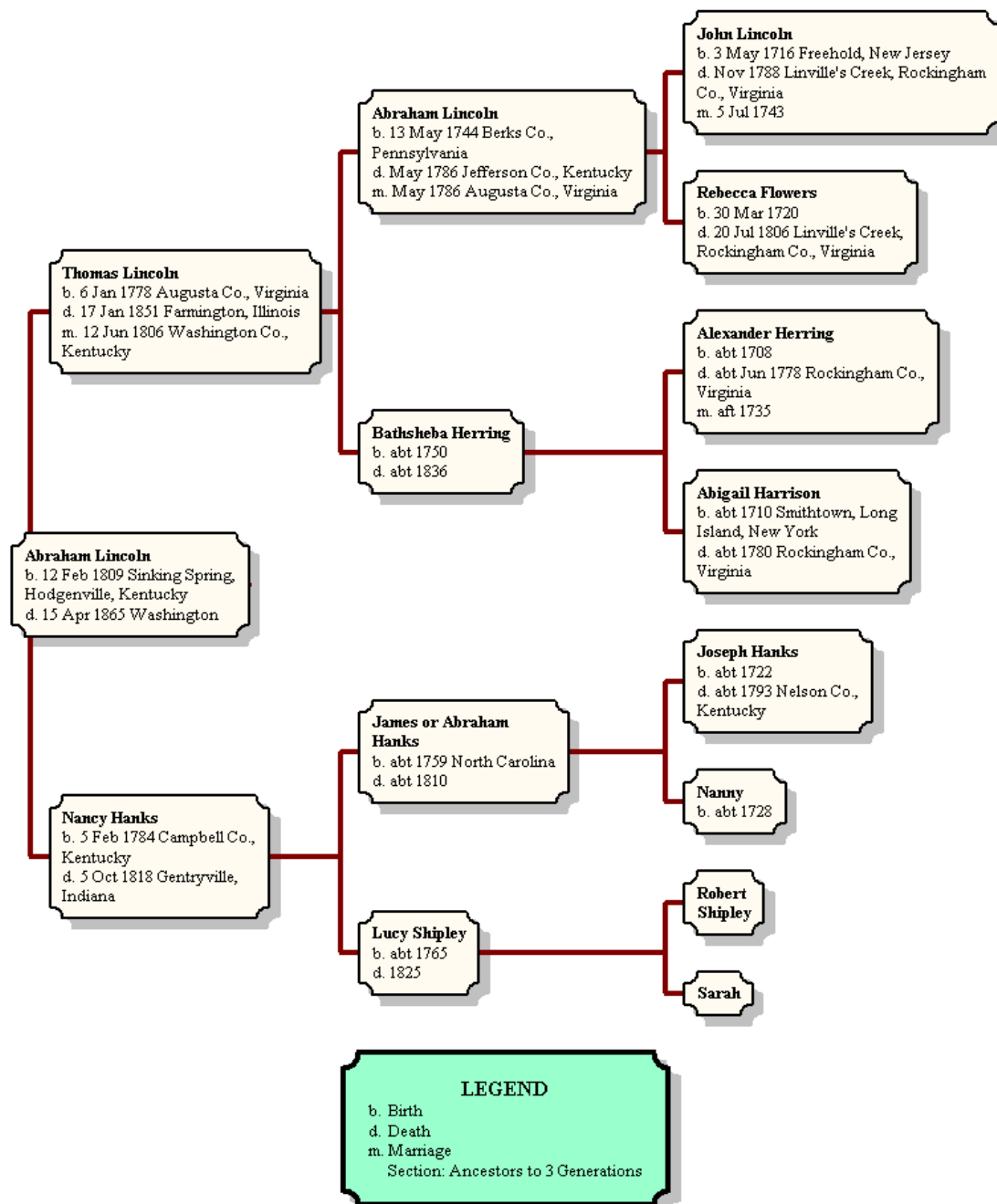
The **Close** button closes the Chart Options View. If you were using a chart options file selected from the Chart Options Menu, only the window is closed; the chart options file will remain open, so that the next time you open that menu option, any changes you made during the current session will still be there.

If you had opened your chart options file with the "Open Options file..." menu choice, both the document and window are closed when you click this button. If you have made changes to the chart options file, you will be prompted to save your changes first.

Ancestor Charts

Ancestor charts show the ancestors of the starting individual(s). A typical ancestor chart is shown below:

Ancestors of Abraham Lincoln

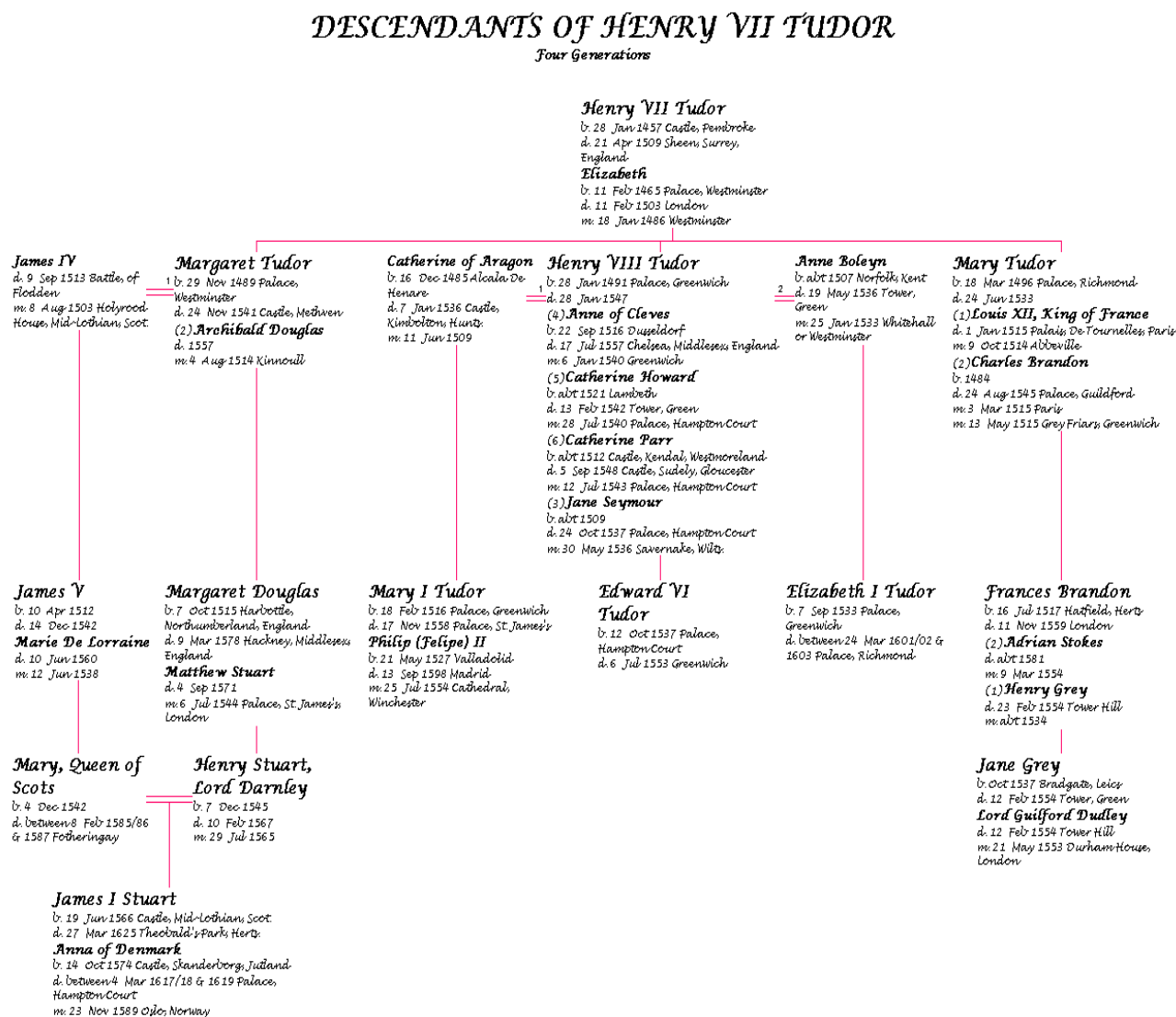


In this example, Abraham Lincoln is the key individual. Three generations of ancestors were selected on the Sections page. The "Direction of Drop" layout setting for this chart was "right", so that each earlier generation is displayed as a column of boxes, progressively further to the right.

Descendant Charts

Descendant charts show the descendants of the starting individuals.

In the example below, the "unboxed" style was used:



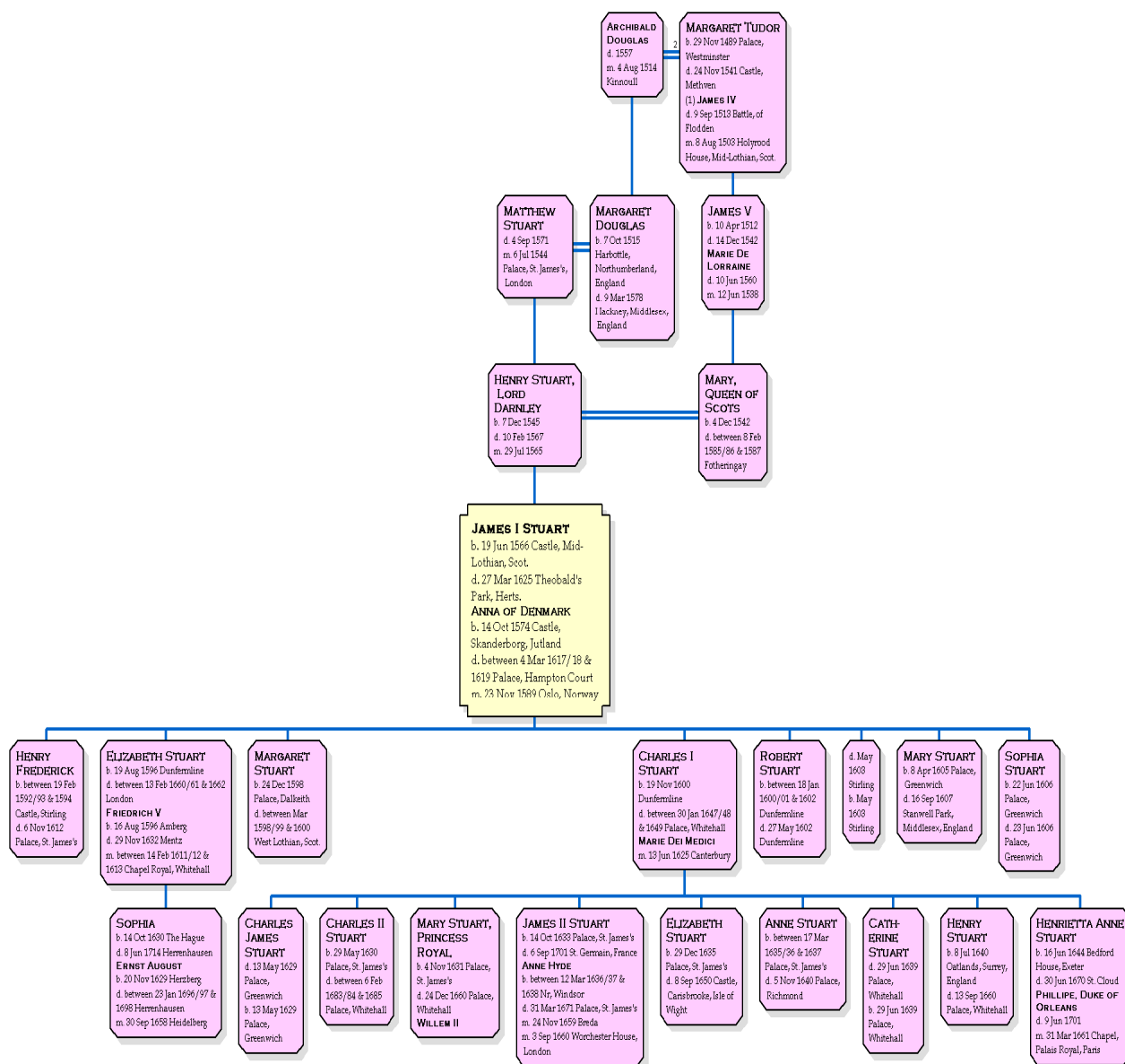
For this example, the "Direction of Drop" layout setting was set to "down". Four generations of descendants are shown, with each generation appearing as a row of names progressively lower on the chart.

Related Charts

Related charts show both the ancestors and descendants of the starting individuals. This can produce an "hour-glass" chart shape: wide at the top and bottom, with a single individual occupying the middle.

An example of a related chart appears below:

RELATIVES OF JAMES I STUART



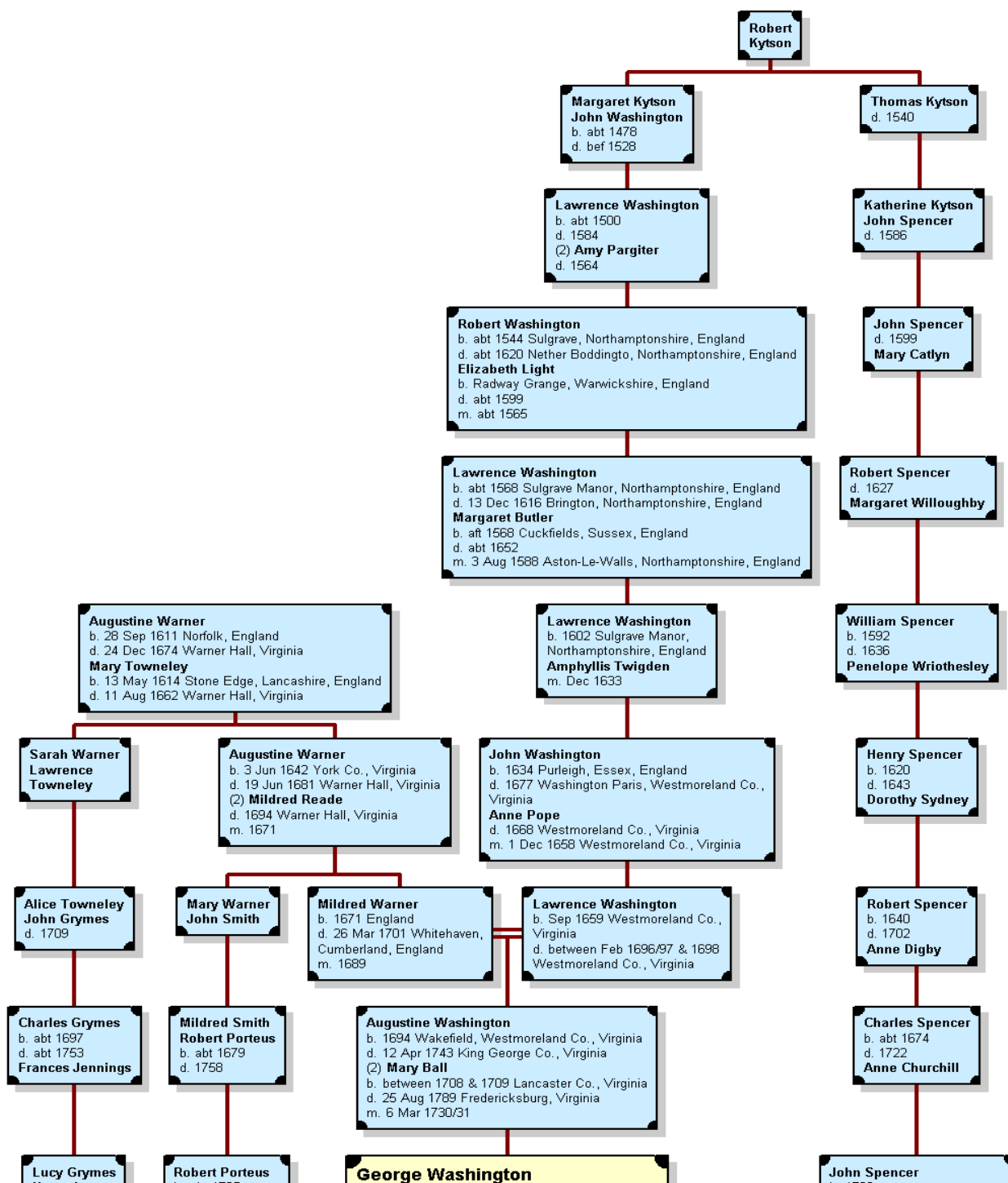
In this example, **James 1 Stuart** was the key individual. Three ancestor generations and two descendant generations are shown.

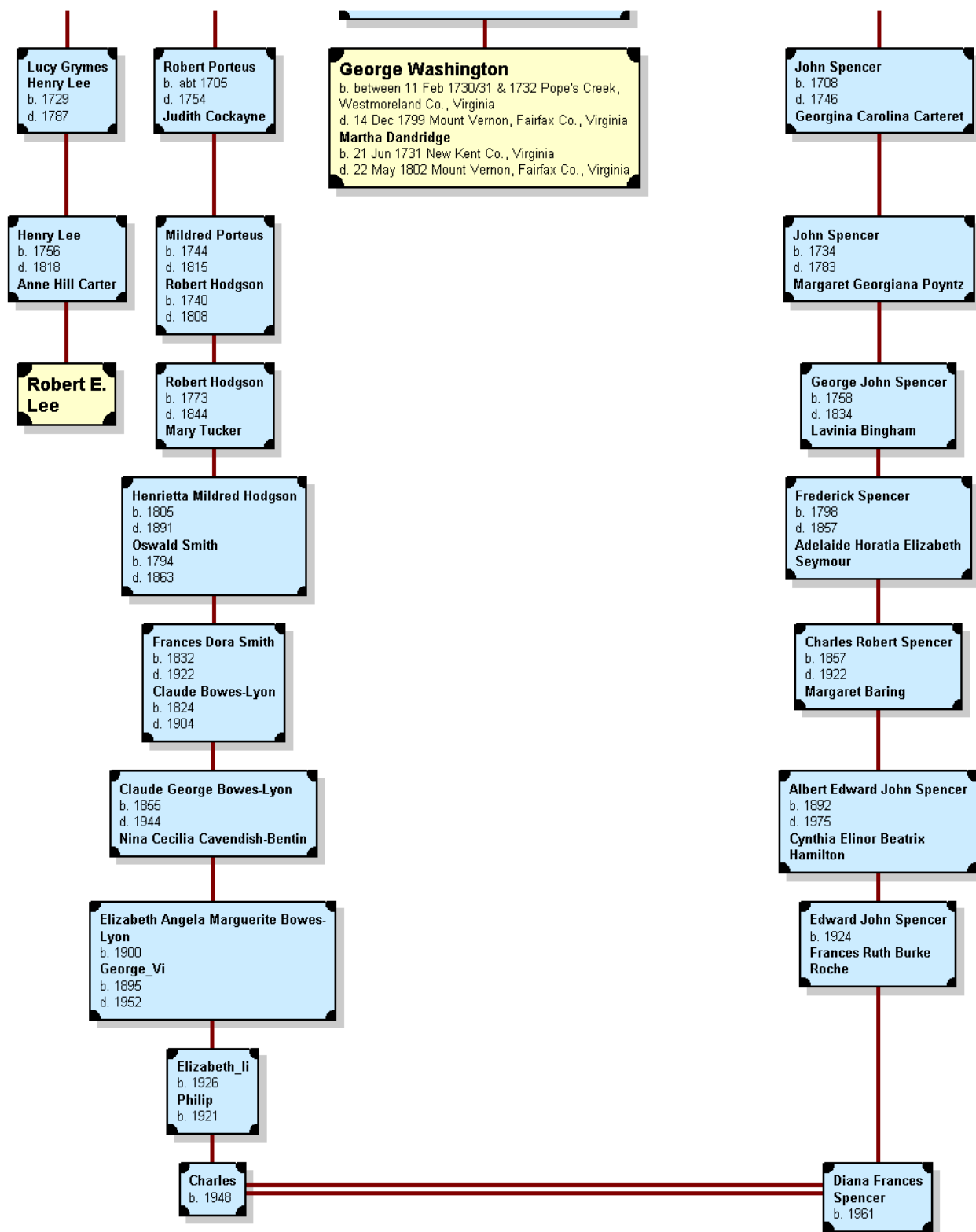
Convergent Charts

Convergent charts show the lineage paths between two or more starting individuals. Genbox will find all possible paths through the data set.

The example below shows the lineage paths between President George Washington and Robert E. Lee:

Convergence Chart for George Washington and Robert E. Lee





In this example, two lineage paths were found between Washington and Lee. The shortest path is through his paternal grandmother **Mildred Warner**. Washington's great-great grandparents **Augustine Warner** and **Mary Towneley** were Lee's 4th-great grandparents. This is a direct lineage path. The other convergent path found is through Washington's paternal grandfather, back seven more generations to **Robert Kytston**, then down 16 generations to Lady Diana, who married Prince Charles, who is the 9th-great grandson of Washington's great-great-grandfather **Augustine Warner**. This is an indirect path.

Everyone Charts

Everyone charts include every individual in your database. They are good for getting an overview of everything you have, which may be one large tree, or a large tree and several disjoint parts. Often you can find single boxes or small trees that have gone overlooked.

An example of an Everyone chart from a small data set appears below:

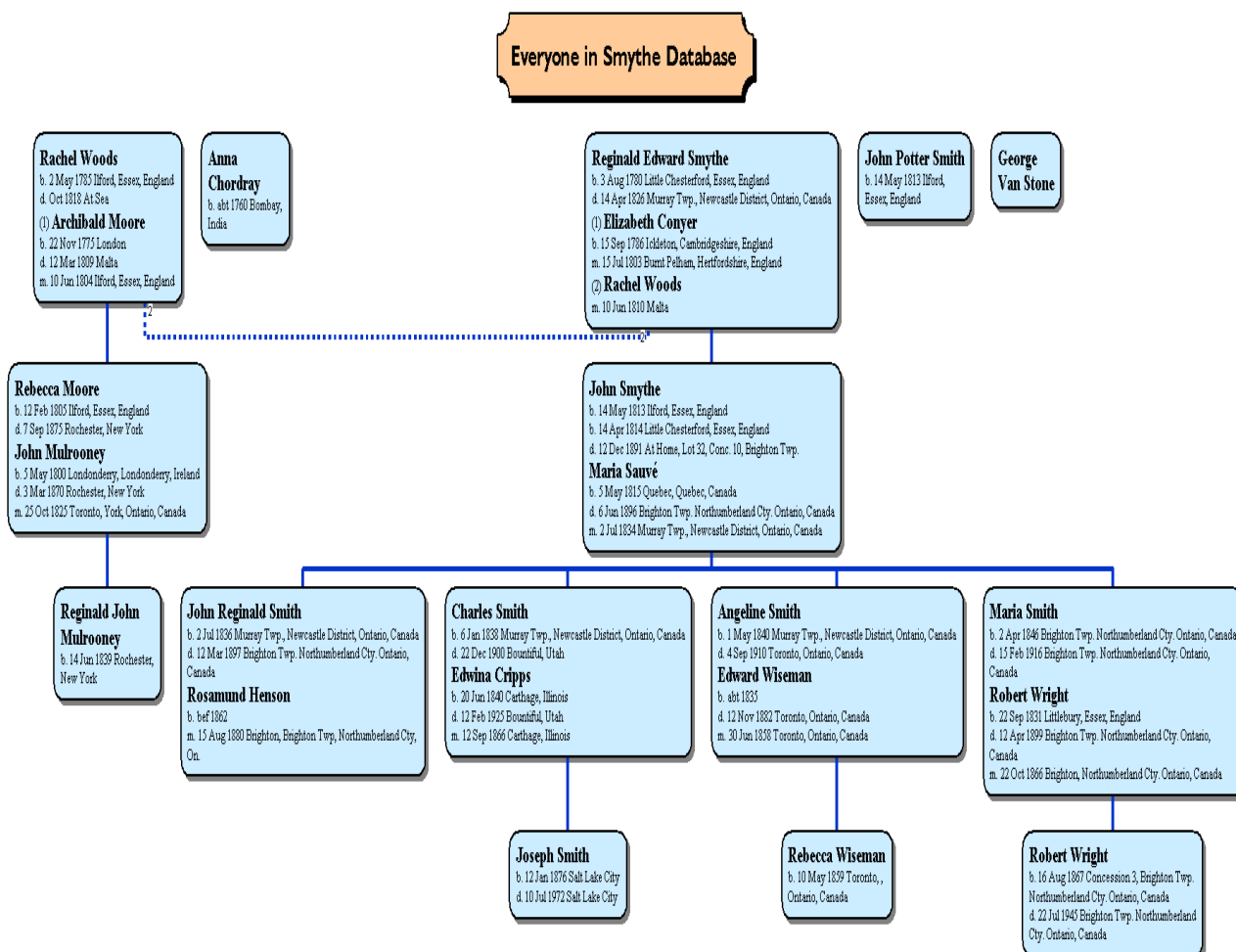


Chart Options View: Key Page

Charts are based on **key individuals**. The key individuals determine the **starting points** for the chart. On a **Descendants** chart, each key individual will be shown, linked to his children, each of them linked to their children. Likewise, an **Ancestors** chart will show the key individual, linked to his parents, each of them linked to their parents, and so on. When there are several key individuals, each of them will be treated as the starting individual in turn, with the results merged into a single chart.

Smythe.GDB: ANCESTOR Chart Options

Key | Titles | Section | Layout | Content | Styles | Detail | Links | Format | Sizes | Frames

ANCESTOR CHART For:

Reginald Edward SMYTHE (1780 - 1826)	<div>Reginald Edward Smythe b. 3 Aug 1780 Little Chesterford, ESS, ENG d. 14 Apr 1826 Murray Twp., Newcastle District, Ontario, Can.</div>
Add key	

Clear Load Saved Keys Select... Select List... Select Query...

Make Chart Save Options Reload Defaults Close

The key individuals are specified on the **Key page**. Most often, a single key individual is used. When the [Chart Options View](#) is first opened, the default key individual will be the current individual on the [Individuals View](#).

Notes

- The **Convergent** chart requires a minimum of two key individuals, so that the lineage between them can be drawn.
- The **Everyone** chart does not require any key individuals. If provided, they will influence the order in which the chart is constructed, which allows you to have some control over the resulting structure.



Key Individuals List

The **Key individuals** list displays the names of the key individuals, one on each row.

- To add a key individual**, click where it says "Add key", then type the name of the individual.
- The [Individuals Pick Dialog](#) will open, displaying a list of the matching names, with birth and death dates select the intended name from the list.

Key individuals can also be added by clicking the [Select button](#).

Besides individual names, **lists** and **queries** can also be specified for determination of the key individuals. When a row contains the name of a list or query instead of the name of an individual, an icon will precede the name, identifying its type:

-  List
-  Query

A list name is added with the [Select List button](#). All members of the list will be considered key individuals. A query name is added with the [Select Query button](#). The resulting list of individuals when the query is run will be considered key individuals.

Preview Box

The **Preview** box displays a chart box for the currently selected key individual. The contents and style of the chart box match the settings for default boxes, as specified on the [Content](#) and [Styles](#) pages. By viewing the **Preview** box, you can get an idea of how the chart boxes will look before the full report is generated.

By clicking the names of different key individuals, you can view the additional content that will appear for each of them on the report, which can be helpful in determining if you selected the key individuals you intended.

Clear Button

Click the **Clear** button to remove all of the names from the list box.


Load Saved Keys Button

When the chart options are saved to a chart options file, the current key individuals are saved along with the options. When the chart options file is reloaded, the saved key individuals can be reloaded as well by clicking the **Load Saved Keys** button. With this feature, you can save a favorite list of key individuals and select them again with just one click.

Select Button

Click the **Select** button to add key individuals using the [Individuals Pick Dialog](#).


Select List Button

Besides individual names, **lists** can also be specified for determination of the key individuals. The **List icon**  identifies rows that contain the name of a list instead of the name of an individual. All members of the list will be considered key individuals.

To add a list name, click the **Select List** button. The [List View](#) will open, allowing you to select a list name. Click the name of a saved list of individuals, then click the **Select List Name** button. Or, click the **Select List Members** button to add the names of the members to the list box instead of the list name. The chart results will be the same either way, but each approach has its advantages:

- Click **Select List Name** if you plan to save your chart options for future use. Then, the next time the chart options are used, the **current** members of the named list will become key individuals.
- Click **Select List Members** if you want to selectively remove some names or reorder the names before making the chart.

Select Query Button

Besides individual names and lists, **queries** can also be specified for determination of the key individuals. The **Query icon**  identifies rows that contain the name of a query. The resulting list of individuals when the query is run will be considered key individuals.

To add a query name, click the **Select Query** button. From the [Open File Dialog](#), select the name of a saved query definition. Query definition files have the extension .QRY.

The query is not run until the **Make Chart** button is pressed. If you save your chart options for future use, any queries will run each time a chart is produced, and the results at that time will be used as the key individuals.

Chart Options View: Titles Page

A chart can have a **Main title** and a **subtitle**. It can have **legend boxes** that define abbreviations and other aspects of the chart. It can have **generation labels**. Book layout charts can also have **page headers**. These options are all set on the **Titles page**.

The screenshot shows the 'Smythe.GDB: ANCESTOR Chart Options' dialog box with the 'Titles' tab selected. The dialog has a menu bar with options: Key, Titles, Section, Layout, Content, Styles, Detail, Links, Format, Sizes, and Frames. The 'Titles' section includes fields for 'Main title and subtitle' (with a 'Placement' dropdown set to 'Omit titles'), 'Page header for book layout' (with a 'Ref:' field set to 'see part [PAGE]'), and a 'Legend Box' section. The 'Legend Box' has a 'Title' field, a 'Placement' dropdown set to 'Omit Legend', and checkboxes for 'Field labels', 'Key individuals', 'Section', 'Styles usage', 'Icons usage', 'Citations', 'brief', and 're-use'. Font size and style selectors are provided for the main title, page header, legend title, and legend body. At the bottom are buttons for 'Make Chart', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Main Title and Subtitle

The **Main Title** of the chart will be initialized to a default value, based on the chart type and key individuals. The **Subtitle** will initially be blank. You can set it to any text you wish.

For easier translation into other languages, you can use a number of variables:

- **[DATATYPE]** - data type for current chart: Ancestors, Descendants, Relatives, Convergence, Everyone.
- **[CHARTTYPE]** - chart name: Ancestor Chart, Descendants Chart, Relatives Chart, Convergence Chart, Everyone Chart.
- **[OF]** and **[FOR]** - common prepositions used in titles.

When a resource file is available for the currently selected output language, these variables will be translated automatically.

You can control the line breaks in the titles by inserting "\n" (backslash followed by the letter n) at the desired break points.

Titles Placement

The chart titles can be placed in a number of places on the chart. Choices appear on the drop-down list:

The screenshot shows a dropdown menu with the following options: Omit titles, Above chart, Below chart, Inside top, and Inside bot.

Above chart will center the title box above the chart, outside of the chart frame. **Below chart** will center the title box below the chart, outside of the chart frame. These placements are independent of the selected drop direction and alignment options, and can be used for both normal charts and fan charts.

Inside top will place the title box inside of the chart frame, at the "top" side of the chart. If the direction of drop is down, for example, the "top" would be above the chart. If the direction of drop is to the right, the **Inside top** placement would be the left side. Likewise, the **Inside bottom** choice will place the title box under the last generation, in the direction of drop. For both of these placements, the current alignment option will control the centering of the box; if set to "right", for example, the title box will be right aligned, the same as for the chart boxes. **Note:** Inside top and Inside bottom placements are not supported for fan charts.

Chart titles are omitted in the basic chart definition.

Page Header for Book Layout

When **Book layout** is chosen on the [Layout page](#), you can use this box to enter a template for generating the page headers. A book layout chart is divided into parts, with one part on each page. Each part is labeled, and each link line leading off of a part has a reference label that indicates the part on which it continues.

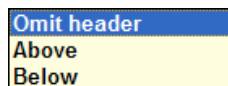
The default page header template is:

Part # [PAGE] of [PAGECOUNT]

The variable **[PAGE]** will be replaced with the part number, and the variable **[PAGECOUNT]** will be replaced with the total number of parts.

Page Header Placement

When **Book layout** is chosen on the [Layout page](#), you can use this box to specify the placement of the page headers. Choices from the drop-down list are:



Above means the page header will be placed above the part. **Below** will place the header at the bottom of the page.

Part Reference Text

When **Book layout** is chosen on the [Layout page](#), you can use this box to enter a template for generating the part reference labels. A book layout chart is divided into parts, with one part on each page. Each part is labeled, and each link line leading off of a part has a reference label that indicates the part on which it continues.

The default part reference template is:

see part [PAGE]

The variable **[PAGE]** will be replaced with the part number.

Number Pages Check Box

Click the **Number Pages** check box to include page numbers on the chart. The page numbers will appear in the lower right corner of each chart page, except on pages where a box obscures that location. Pages will be numbered left to right, top to bottom. The font appearing to the right of the **Label Generations** check box will be used.

Label Generations Check Box

When the **Label Generations** check box is checked, additional chart boxes that display the chart generation levels will be included on the chart.

Tick Marks Color Button

Use the **Tick Marks Color** button to select the color for the tick mark lines on a **timeline** chart. Clicking this button will open the [Select Color Dialog](#) for selection of the color.

Note This control is only visible when **Generational Alignment** is set to **timeline**.

Legend Box Title

The **Legend Box Title** appears as the title of the legend box, when it is included.

For easier translation into other languages, you can use the variable **[LEGEND]** to produce the default title "Legend". When a resource file is available for the currently selected output language, this text will be translated automatically.

Legend Placement

The legend boxes can be placed in a number of places on the chart. Choices appear on the drop-down list:



Above chart will center the legend boxes above the chart, outside of the chart frame. **Below chart** will center the legend boxes below the chart, outside of the chart frame. These placements are independent of the selected drop direction and alignment options, and can be used for both normal charts and fan charts.

Inside top will place the legend boxes inside of the chart frame, at the "top" side of the chart. If the direction of drop is down, for example, the "top" would be above the chart. If the direction of drop is to the right, the **Inside top** placement would be the left side. Likewise, the **Inside bottom** choice will place the legend boxes under the last generation, in the direction of drop. For both of these placements, the current alignment option will control the centering of the boxes; if set to "right", for example, the legend boxes will be right aligned, the same as for the chart boxes. **Note:** Inside top and Inside bottom placements are not supported for fan charts.

Legend boxes are omitted in the basic chart definition.

Legend Content Check Boxes

A number of check boxes control the inclusion of content in the **Legend Box**:

Field Labels

When checked, the **Field labels** will be shown along with their full names, such as:

b. Birth
d. Death
m. Marriage

Key Individuals

When checked, the names of the **Key individuals** will be included in the legend box.

Section

When checked, the **sections** specified on the Section page will be described. Possible descriptions include:

- Section: All Descendants
- Section: Descendants to 2 Generations
- Section: Ancestors to 1750

Styles usage

When checked, the **styles** specified on the Styles page will be described.

Icons usage

When checked, the **icons** added on the Content page will be shown along with their usage.

Citations

When checked, **source citations** for data included on the chart will be presented. Each citation will be numbered in order. "Ibid." will be used when a citation is the same as the previous one listed.

Brief Citations

The **Brief citations** check box is enabled when the **Citations** check box is checked. It specifies that the included citations should be in brief format: lead text, annotations, and excerpt text are omitted.

Re-use Citation Note Numbers

The **Re-use citation note numbers** check box is enabled when the **Citations** check box is checked. It specifies that citations to the same source (and same location within that source) should use the same citation note number. This can greatly reduce the use of "Ibid." in the Legend Box.

Multiple Legend Boxes

The resulting size of the legend box depends on the content options selected and your data. If **Citations** is checked, and you have a large number of citations for individuals on the chart, the legend box can become very tall. You can control the size of the legend box by setting nonzero values for **Box Max Height** and **Box Max Width** on the Sizes page. When the contents of the legend box exceeds the sizes specified, additional legend boxes will automatically be created, so that all of the content can be shown.

The default placement of multiple legend boxes will be left to right in a centered row for most layout options. For a sideways chart layout with legend box placement set to **Inside top** or **Inside bottom**, the legend boxes will appear top to bottom in a column.

Font Buttons

Each of the other elements on this page can have its own **font**.

- **To set font characteristics for an element**, click the **Font** button next to it.

The Font buttons are: Main Title font, Subtitle font, Page Header font, Page Reference font, Generations / Timeline Label font, Legend Title font, Legend Body font.

For help on setting the fonts for several elements at once, see the section [Select Font for Multiple Group](#).

Note Font buttons for disabled elements will also be disabled.

Chart Options View: Sections Page

A genealogy database can have tens of thousands of individuals. Often, the individuals you want to show on a chart are only a small subset of the database. Some charts can be limited to a small number of individuals naturally:

- A **Descendant** chart is limited naturally when the key individual is in one of the more recent generations.
- An **Ancestor** chart is limited naturally when the key individual is in one of the earlier generations.
- A **Convergent chart** is limited naturally because the default for that chart is only the path between the key individuals.

But sometimes what you are interested in requires the establishment of "cut-off" points, such as: "Show me descendants of the key individual, but for only 3 generations", or, "Show ancestors of my key individual, but stop when you get to 1740". Or, "Show me 4 generations of ancestors and 3 generations of descendants, plus all of his aunts, uncles, cousins, nieces and nephews." Such limits define a **section** of the database that is of interest.

The **Sections page** is used to specify these limits. In addition to number of generations, cutoff dates, and collateral relatives, it can also limit the chart by controlling which types of parent-child links to follow, and whether spouses and living individuals are included.

Direct Lines

The **Direct lines** are the direct ancestors and direct descendants of the key individuals: The grandparents, great-grandparents; children, grandchildren, and so on. The **Generations to go from Key Individuals (Direct Lines)** group box is used to specify the limits on direct lines. For **Ancestor** charts, the **Ancestral** direct lines can be limited. For **Descendant** charts, the **Descendant** direct lines can be limited. For other chart types, both ancestral and descendant lines can be limited.

Number of Generations

The direct lines can be limited to a certain **number of generations** removed from the key individuals. By counting the key individual as generation 0, his parents are generation 1, his grandparents are generation 2, and so on. Going the other way, his children are generation 1, and grandchildren are generation 2. So if a **Descendants** chart has "Generations to go from Key Individuals" set to 1, only the key individual and his own children will be shown on the chart.

1. To limit a direct line to a certain number of generations, click the **Number** radio button.
2. Type the number in the box, or use the up/down arrow buttons to set the value.

Note Setting the number of generations to zero is the same as clicking the **None** radio button. Only the key individual will be shown.

To Date

The direct lines can be limited to a certain **date**. This date is meant to totally enclose the life spans of the individuals to be included on the chart; individuals living even partly outside the range are excluded.

For **Ancestral** lines, click the **To date** radio button and enter the **earliest date for birth** in the box.

Ancestors must be born **on or after** the specified date to be included. When ancestors are born before the specified date, they will be omitted. When the birth dates are unknown but another event date places them before the specified date, they are also omitted.

- For **Descendant** lines, click the **To date** radio button and enter the **latest date for death** in the box.

The descendant must be **deceased** by the specified date. If the date of death is unknown, and the **Living** attribute flag has not been set, Genbox will determine if the descendant should be considered deceased by taking the birth date and adding the default maximum life span value specified on the [Preferences View, Dates page](#).

To Common Ancestor/Descendant

When producing a **Convergent** chart, the default limit for an ancestral direct line is **To common ancestor**, and the default limit for a descendant line is **To common descendant**. This limits the chart to its natural section, showing just the generations necessary to display the lineages between the key individuals.

You may wish to specify a limit on the ancestral or descendant generations. This will restrict the search space the program will use in searching for the convergent line between two key individuals. If no convergent line can be found while staying within the specified bounds, the chart will not be produced and the message box "No convergent paths found" will be displayed.

Collateral Relatives

The choice of key individuals determines the direct lines. But there are other relatives--aunts and uncles, nieces and nephews, cousins, and their spouses. These relatives are collectively referred to as **collateral relatives**. Collateral relatives are reached by moving along a direct line in one direction to reach a direct ancestor or descendant, then, starting from this new individual, moving in the **opposite** direction along this new individual's direct lines. Each relative reached will be a collateral relative of the starting individual.

Number of Generations--Examples

For example: suppose we are making an **Ancestor** chart. We want to show two generations of ancestors: parents and grandparents. We set the **Ancestral** direct lines to two generations. And, we want to see aunts, uncles, brothers, sisters, and first cousins. We can do this by setting the **Descendant** collateral relatives to two generations. Genbox will move along the direct lines to ancestors, then, for each direct ancestor, it will move to the direct ancestor's direct-line descendants, and include them on the chart as well.

Another example: suppose we are making a **Descendant** chart. We want to show children, their spouses, and the **parents** of the spouses. We would set the descendant direct line generations to 1, and the ancestral collateral generations to 1.1

Max Generations

Collateral relatives can be limited by the number of generations traversed, the same as for direct line generations. But instead of an **All** radio button, collateral relatives have a **Max** radio button. This reflects a restriction on collateral relatives:

- Collateral relative generations cannot exceed the upper/lower bounds of the direct line generations.

The effect of this restriction is that collateral relatives merely "fill out" a slice of the genealogy. They don't extend it to earlier generations of ancestors or to additional generations of descendants. Click the **Max** button to show the maximum number of generations that are permitted.

Apply Recursively

Once the initial set of collateral relatives have been determined by moving from the direct line relatives, it is possible to use this new set of collateral relatives and find **their** collateral relatives, again limited by the number of generations specified. This process can be repeated until there are no other relatives. Click the **Apply recursively** check box to select this option.

Note This option is available only when nonzero collateral generations have been specified for **both** ancestors and descendants, because it requires movement in two directions ("walking" up and down repeatedly) for this feature to have any effect.

Gender Lines to Follow

Normally, both male and female lines are followed from the key individuals. If you are interested in only one gender, you can restrict your chart to follow just those lines. The choices for this option are:

All
Male only
Female only
All male, 1 generation female
All female, 1 generation male

gender will not be considered.
 all female lines will be excluded.
 all male lines will be excluded.
 all female lines will be terminated after one generation.
 all male lines will be terminated after one generation.

Parent-child Links

In addition to the traditional biological relationship between parent and child, Genbox supports the storage of other parent-child relationships. The check boxes in the **Parent-child links to show** group box allow you to control which of these parent-child relationships to include on your chart. An excluded relationship type will end a lineage line. There can be multiple parent boxes that link to the same child box.

All: every type of relationship link will be shown.

Preferred: just the links marked with the **Preferred parent family** check box on the [Parents page](#) will be shown. When this choice is the only one selected, the chart will never show more than one parent family connected to a child box.

Biological: links to biological parents are shown. Links marked as "Direct Ancestor" will also be shown.

Adoptive: links to adoptive parent families are included.

Foster: links to foster parent families are included.

Godparent: links to godparents are shown.

Sealing: links to individuals sealed as parents in an LDS sealing ordinance are shown.

Relative: links to other individuals known to be relatives are shown.

Other: links marked as "other" are included.

Unknown: links marked as "unknown" are included.

Living Individuals

By default, living individuals are shown with the normal content (as specified on the Contents page). If you plan to distribute a chart outside of your own family, you may wish to restrict the content shown for living individuals, to respect their privacy. The **Living individuals** box presents the following choices on its drop-down list:

Omit
Normal Content
Identifiers, Links
Sex, Links

When **Omit** is selected, living individuals and all links to them are treated like they are not even in your database. This means lineages will be ended when they reach a living individual. On a **Descendants** chart, for example, if a deceased individual has five children, of which two are still living, the chart will show the individual as having only **three** children. And no further descendants will be shown for the living children, even if they are deceased.

When **Identifiers, links** is selected, the names and relationships of living individuals are included, but no other information. No events, dates, or places. "Names" will include all the identifiers normally selected for output.

When **Sex, links** is selected, the name will be replaced by "Male" or "Female", so that only the sex and relationships of living individuals are shown. This provides a level of privacy higher than **Identifiers, links**, because names are not shown.

Override Privacy Flags

When **Override privacy flags** is checked, parent relationships and spouse relationships that have the **Private** flag checked will be shown with their true relationships on the chart. Normally, private parent relationships are shown as "biological" and private spouse relationships are shown as "married" on charts and reports.

Override Exclude Flags

When **Override exclude flags** is checked, parent links, spouse links, and events that have the **Exclude** flag checked will also be included on the chart. Normally, these records are omitted from charts.

Include Alternate Events

When **Include alternate events** is checked, the events that are marked "alternate" will also be charted. Normally, alternate events are omitted from charts.

Converge on Direct Lines Only

For Convergent charts: when **Converge on Direct Lines Only** is checked, only direct line (blood) relationships will be followed when looking for a convergent ancestor or descendant. When not checked, any connecting relationship may be followed.

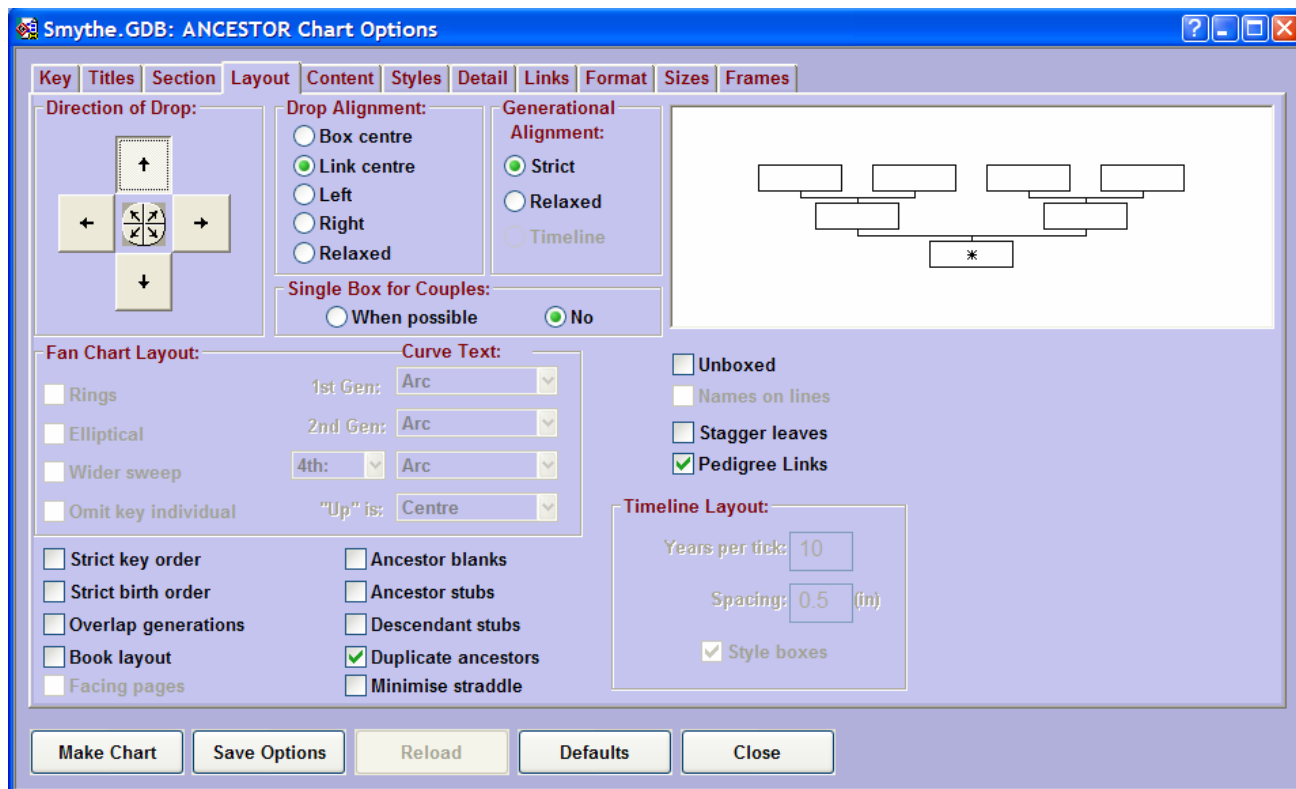
Omit Spouses

When **Omit spouses** is checked, individuals related to the direct lines only by marriage are not included. This means spouses on **Descendant** charts are omitted from the chart, unless they have an independent direct lineage. **Ancestor** charts are generally unaffected, because both parents are direct line ancestors.

Chart Options View: Layout Page

A genealogy can take on many different shapes. If your research is deep in a few lines, it will be tall and thin. If you have tried to include all your recent collateral relatives, it will be short and wide. If you have done some deep research in a few lines and concentrated in breadth in other lines, or if you have imported the genealogies of other researchers and merged them with your own, your genealogy will have a shape that is hard to describe, but certainly interesting. When it comes time to make charts, how should it all be displayed? You would like a well-balanced chart. Something that will be attractive in its intended setting.

The **Layout page** is used to select from many different organizational possibilities for your chart. Depending on the data you are charting, some layouts may look better than others. Experiment until you find something that looks good to you.



Direction of Drop

The **Direction of Drop** control is a cluster of eight push buttons with arrows pointing in all directions. When a button is selected, it will display a pressed appearance. The four rectangular buttons pointing up, down, left, and right select rectangular charts. The four buttons in the inner circle select **fan charts**.

"Direction of Drop" refers to the direction that a viewer of the chart would need to look to go from one generation to the next.

- For **Ancestor** charts, the "drop" is from an individual's generation to his **parent's** generation.
- For all other chart types, the "drop" is from an individual's generation to his **children's** generation.

The default drop direction for **Ancestor** charts is **up**: this shows parents above the starting individual. Another common drop direction for ancestor charts is **right**: this shows each generation as a vertical column, with earlier generations to the right.

The default direction for other chart types is **down**: this shows children below the starting individual. Often, this will produce a short, wide chart. This type of chart could extend along a wall or be laid down a long table. You may wish to change the drop direction to **left** or **right** to produce a tall, narrow chart, which could occupy the space from ceiling to floor but be only a few feet wide.

Fan Charts

Clicking one or more of the inner circle of buttons will select a **fan chart layout**. A fan chart begins in the center of a circle with the key individual, and each generation becomes a **ring** (either full or partial) around the

center. Fan charts can be an elegant layout for ancestor charts, and a space-saving layout for descendant charts.

There are four fan chart buttons, each selecting a quadrant of the circle.

- Click a single fan chart button to produce a quarter-circle fan chart.
- Click two buttons on the same side of the circle to produce a half-circle fan chart.
- Click all four fan chart buttons to produce a full-circle fan chart.

To deselect all the fan chart buttons, click on one of the rectangular buttons.

Drop Alignment

The **Drop Alignment** group box allows you to specify how child box groups should be positioned and linked beneath their parent boxes. The option buttons available are:

Box center: child box groups are linked and centered beneath the direct line ancestor. A parent spouse box will not affect alignment.

Link center: same as **box center** when parents are in same box. When parent spouse boxes are shown, child box groups are linked to the center of the family link. Single child boxes are centered beneath the link line, and child box groups are centered beneath both parent boxes taken together.

Left: the left edge of the first child box is aligned with the left edge of the parent. Spouses boxes are shown off to the right.

Right: the right edge of the first child box is aligned with the right edge of the parent. Spouse boxes are shown off to the left.

Relaxed: alignment beneath parents is generally ignored. All of the boxes in a generation are centered as a whole beneath the parent generation. This produces a nice centering effect when looking at the chart as a whole, but it often produces jagged link lines

Note The interpretation of "left" and "right" changes with the [Direction of Drop](#).

Generational Alignment

A generation is **aligned** when all of its boxes appear in a row or column (or in a ring for fan charts). Setting **Generational alignment** to **Relaxed** will permit boxes to be drawn either higher or lower than other boxes of the same generational row, or left or right of a generational column. Relaxing the generational alignment allows the chart layout to become more compact, as extremely wide charts can be narrowed by stacking some boxes from the same generation vertically. It also makes it possible to avoid some crossovers by lowering or raising a section of the chart.

Timeline Charts

Setting the Generational alignment to **Timeline** will select a timeline chart layout. This option is only available when the Direction of drop is left or right. A timeline chart positions and sizes boxes according to the birth and death dates of the individual displayed inside the box. Individuals who had longer life spans will have wider boxes. The boxes will be arranged vertically with no overlap in the horizontal direction. A timeline will be shown at the top and bottom of the chart, with vertical lines drawn beneath the boxes to make their placement easier to read.

Single Box for Couples

Families can be drawn in two ways: with information on spouses in separate boxes, and with information on spouses in the same box that contains the information on the primary individual. Showing spouse and primary information in the same box can save considerable space on a chart. If the ancestors of a spouse are included on the chart, then a separate box is required in order to show the ancestor link.

The **Single Box for Couples** group box has the following option button choices:

- **When possible:** full information for spouses with no ancestors shown on the chart will appear in the same box as the primary individual. Full information for spouses that do have ancestors on the chart will be shown in a separate box linked to the first.
- **No:** spouses are **always** shown in separate boxes. There is a separate box for each person on the chart.

For primary individuals with multiple spouses, more than one spouse may be shown in the same box with the primary, provided they have neither ancestors nor children displayed on the chart. In that case, the **last** spouse shown in the box will be the parent of any children shown linked to the box.

Preview Box

The **Preview** box displays a small chart of empty chart boxes, demonstrating the current layout settings. The key individual's box is marked with an asterisk.

Fan Chart Layout

The **Fan Chart Layout** group box contains a number of controls for fan charts. These controls are enabled only when the [Direction of Drop](#) control is set for fan chart layout.

Rings

When the **Rings** check box is checked, the fan chart will be shown with no gaps between generations, and no gaps between boxes on a generational level, which gives the chart the appearance of rings. This layout option is only available for **Ancestor** charts. When selected, the [Drop Alignment](#) and [Generational Alignment](#) controls will be disabled.

Elliptical

Checking the **Elliptical** check box will cause the fan chart to assume the same aspect ratio as the page of the default printer. If nonrectangular, this will make a round fan chart **elliptical** in shape. This option can help a fan chart fit the paper better.

Wider Sweep

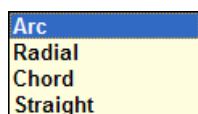
The **Wider Sweep** check box is enabled when doing half-circle charts. It will increase the angular sweep of the chart from 180 degrees to about 202 degrees, which helps the chart fill nonrectangular paper.

Omit Key Individual

The [Direction of Drop](#) for fan charts is always from the center to the edge. The key individual, then, appears in the center of the fan. Because all other generations form rings around the center, the size of the key box affects the size of the entire chart. If the **Omit key individual** check box is checked, the overall size of the fan chart is often reduced, with just a small hole in the center. The information that would have been displayed for the key individual can then be incorporated into the title or the subtitle of the chart.

Curve Text

When producing fan charts, there are several ways to draw the text:



- **Arc:** The text follows an imaginary circle around the center.
- **Radial:** The text follows an imaginary line radiating from the center.
- **Chord:** The text is drawn on an imaginary straight line whose ends are an equal distance from the center. It is like an **Arc** that isn't curved.
- **Straight:** The text completely ignores the curvature of the fan chart; it appears straight and upright, regardless of where it is on the fan. To make it stay within the box, each line is staggered.

Depending on how close a generation is to the center, the number of boxes in the generation, and the amount of text in the boxes, some text curvature choices will save more space than others. A fan chart usually will have one **controlling generation**, which is "bigger" than any other. The diameter of that generation is the controlling factor for the size of the chart: generations farther out have extra room, and generations farther in could have been drawn in tighter circles, but weren't because that would have left a gap. So, the controlling generation actually pulls the lower generations up to meet it, creating a center box (or hole) larger than it needed to be otherwise.

- **To reduce the chart size,** identify the controlling generation and find the text curvature choice that will shrink that generation to its minimum diameter.

- If another generation is now the controlling generation, see if there is a better choice for its text curvature to reduce the chart size further.

You can independently set your choice for text curvature for the **first generation**, the **second generation**, and a **selectable higher generation**. Other generations will have the same text curvature as for the previous generation.

First generation: for full circle **Ancestor** fan charts, **Straight** may look the best. For other types of fan charts, you might consider **Arc** or **Radial**. **Chord** is usually unattractive in lower generations, because the high degree of curvature may send the center of the top text line too close to the top edge of the box, or even outside it.

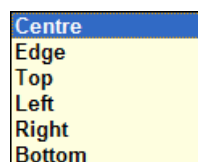
Second generation, other low generations: usually **Arc** looks best, unless there are a lot of boxes, in which case **Radial** should be considered.

Higher generations: for large fan charts, a switch to **Radial** at some point can reduce the overall size of the chart considerably.

Chord text can also be used as an approximation to **Arc** text, especially for higher dimensions, where the difference becomes insignificant. Drawing **Chord** text may be noticeably faster than drawing **Arc** text.

"Up" Direction

With generation boxes running in circles, the question of what "up" is becomes a factor. The choices available from the drop-down list are:



The **Center** choice looks good to a viewer standing on any edge: the text closest to the viewer is right-side-up. But when viewed as a whole, the text on the far side is up-side-down. The **Edge** choice would look good to a viewer standing at the center. To any other viewer, half the chart would again look upside down. The **Top** choice will cause the text on the bottom half of the chart to be flipped, so that a viewer in front would see all of the text right-side-up, or at worse sideways. The **Left**, **Right**, and **Bottom** choices produce a similar flipping of text on one side of the chart.

When a quarter-circle fan or half-circle fan is used, the choice for "up" direction becomes easier to make, as several of the choices become equivalent.

Timeline Chart Layout

The **Timeline Chart Layout** group box contains a number of controls for timeline charts. These controls are visible only when the [Generational Alignment](#) control is set to **Timeline**. [Direction of Drop](#) must be set to left or right for a Timeline chart layout.

Years per Tick

The **Years per tick** edit box contains the numeric number of years between each "tick" on the timeline chart. Entering a larger value will compress the chart horizontally, while a smaller value will stretch it out. The spacing between ticks is not affected.

Spacing

The **Spacing** edit box contains the actual distance (in inches or millimeters) between each tick on the timeline chart. A vertical line is drawn on the chart at each tick position. If you would like to see more vertical lines to help you read the positioning, enter a smaller value. Entering a smaller value will compress the chart horizontally, with the tick lines closer together.

Style Boxes

Click the **Style boxes** checkbox to have Genbox apply a shape to the boxes on the chart according to the date qualifiers present in the data. Each end of the box can have a different shape. The end earlier on the timeline will display a shape according to the qualifier on the **birth** date. The other end of the box will display a shape according to the qualifier on the **death** date. The shape corresponding to each date qualifier is given below:

- unqualified date: straight (rectangular)
- estimated date: oval
- "about" date: rounded
- calculated date: bevel
- before/after dates: arrow pointing either left or right
- unknown date: (empty)

Unboxed

When **Unboxed** is checked, the box borders (lines and margin space) are omitted. This typically saves considerable space, with perhaps a loss of clarity. Box border styles, colors, and shading are also disabled.

Strict Key Order

When producing a chart with multiple key individuals, Genbox will try different left-to-right orderings of the key individuals to find the arrangement that minimizes the size of the resulting chart. The order in which the key individuals are processed can have a dramatic effect on the resulting arrangement, shape, and size of the chart. If you want to control the ordering of the key individuals yourself, click the **Strict key order** check box.

Strict Birth Order

Normally, the children boxes are arranged in left-to-right order beneath the parent boxes. When producing certain types of charts, Genbox may alter the ordering if it improves the layout of the chart, either making it smaller or avoiding a crossover. Click the **Strict birth order** check box to disable this feature.

Stagger Leaves

When **Stagger Leaves** selected, runs of child boxes with no descendant boxes will alternate in the level they are drawn, which can reduce chart width by 20% to 50% when there are many children shown. This option is independent of the "Generational Alignment" setting, so you can have staggered leaves but otherwise have "strict" generational alignment.

Overlap Generations

When producing a rectangular **Ancestor** chart with [Drop Alignment](#) set to "Link center", this option can be selected to reduce the size of the chart. It allows lower generation boxes to tuck partially between higher generation boxes, provided there is adequate space. The boxes themselves do not overlap.

Minimize Straddle

When a large chart is printed on multiple sheets of paper for later assembly into a wall chart, boxes can be split across several pages, "straddling" the page breaks. You may find this unattractive. Clicking the **Minimize straddle** check box will alter the layout of the chart to minimize the straddling. Boxes will be moved left or right so that they will be printed completely on one page, or at least on fewer pages than before. The drawback is that the drop alignments will be off, and the chart will be larger, as additional white space is often introduced.

Book Layout

Charts are produced in wall-chart layout by default. Clicking the **Book layout** check box will produce a chart that is divided cleanly into pages, suitable for inclusion in a book. Each piece is labeled, and joining lines refer to the continuing part with a reference label.

Notes

- Charts that already fit on one page will be unaffected by clicking **Book layout**.
- **Book layout** is disabled for fan charts.

Names on Lines

When [Unboxed](#) is checked and the [Direction of Drop](#) is not up or down, the **Names on lines** check box can be checked to alter the way links and boxes are drawn, so that the first line of data in the boxes (typically, the name of the individual) actually sits on the link line. This can create a visually distinctive look.

Pedigree Links

Family links are the lines drawn between spouses. In **Descendant** charts where the spouse is shown in a separate box, the family link is drawn as two parallel lines between the boxes. For **Ancestor** charts, family links are often drawn a different way: as a single connecting line **below** the boxes. Click the **Pedigree links** check box if you prefer to show family links this way for ancestors of the key individuals. This option is also available for **Related** charts, which will affect the ancestors portion of the chart.

Ancestor Blanks

Genealogies often have some lineages that have been traced to earlier generations than others. When producing an **Ancestor** chart, this may produce an unbalanced appearance in the outer generations, particularly on fan charts. Clicking the **Ancestor blanks** check box will cause extra boxes to be added for the unknown ancestors, filling out the chart to the deepest box which has real data. The extra boxes will be blank.

Ancestor and Descendant Stubs

A **stub** is a short link line with an optional arrow and label that indicates that connecting boxes have been left out. When the [Sections page](#) is used to limit ancestral or descendant lines, you can click on **Ancestor stubs** or **Descendant stubs** to add stubs to your chart. The label will be something like "(two children)" or "(one son)". The format of descendant stubs can be set on the [Format page](#).

Duplicate Ancestor

Ancestor charts may lead to the same ancestor by more than one path. When the **duplicate ancestor** option is checked, this second occurrence will be handled by adding a duplicate box, with reference text added to the original and duplicate boxes to tie them together. Ancestors of the duplicate ancestor will only be shown on the first box. The reference text will contain a unique letter code for each duplicate ancestor, beginning with "[A]" for the first pair of duplicate ancestor boxes. The reference text will be drawn in the [Link Cross Reference Font](#).

When this option is not checked, a single box for the ancestor will be drawn with a crosslink to the second reference.

Facing Pages

When **Book layout** is clicked, the **Facing pages** check box becomes available to indicate that book pages should be treated in pairs. When checked, the chart will be cleanly divided into parts the size of **two** side-by-side pages. Lines will be drawn freely across the two pages, ignoring the page break between them. Part references will be to page pairs.

Chart Options View: Contents Page

After choosing the individuals to show and how the chart should be laid out, the next choice is what to include for each individual. The **Content page** is for this purpose.

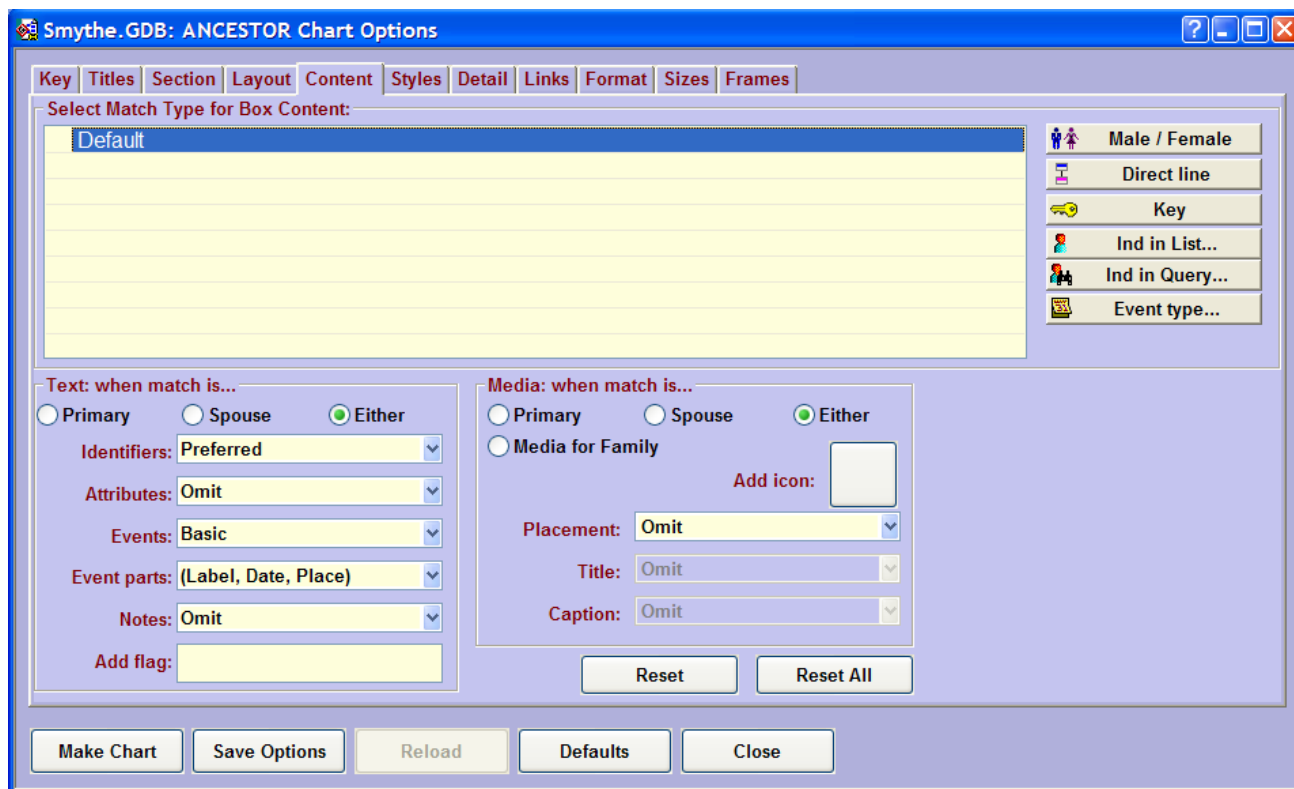
You can set the content for every individual to be the same. You can also vary the content for various groups of individuals, or for particular types of events, to emphasize what you consider important.

The Content page is divided into two parts:

- The top half of the page is for defining and selecting the match types that you want to assign content to. Several buttons are available for predefined match types. You can also select match types from a list or query.
- The bottom half of the page is for setting the content choices for the currently selected match type.

The match set can be further divided in the bottom half between primary and spouse.

The **Styles Page** is the "sister" page to the Content Page. Both pages always maintain the same list of match types. Defining a match type on either page will automatically cause it to appear on the other page as well. For this reason, you can think of each match type as a "chart/style set" because it is shared by both pages, and can be used for both content and style selection.



Match Type List

The **Match Type List** displays all the content sets that have been defined. The content choices for the selected list will appear on the lower half of the page.

The **order** in which the content sets appear is important: the lower in the list, the higher the priority. You can drag the rows to reorder them.

When an individual box is a member of more than one match type, the specified content choices will be merged. When there is a conflict for the same element, priority will be given to content groups that appear later in the match type list.

Default Match Type

The **Default** match type is always the first match type in the list. It specifies the content options that will be used when no other match type applies to an individual. It also specifies the content to use when a match type with a higher priority does not set a value for an option. Most of your content selection will be done when the **Default** match type is selected.

Male / Female Button Male / Female

Click the **Male / Female** button when you want to vary the content between males and females on the chart. When selected, two match types will be added to the list box:

- Male
- Female

Direct Line Button Direct line

Click the **Direct Line** button when you want to select special content for the boxes of the direct line ancestors/descendants of the key individuals on your chart. When selected, two match types will be added to the list box:

- Direct Line Individual
- Family Link to Direct Line Individual

The **Direct Line Individual** content set will be used for the actual direct line individual. If you want to also set special content for the spouse/partner of direct line individuals, you can use the **Family Link to Direct Line Individual** content set. This content set will be used for the spouse, regardless of whether the spouse appears in the same box as the direct line individual or in a separate box to the side.

Key Button Key

Click the **Key** button when you want to select special content for the boxes of the key individuals on your chart. When selected, two match types will be added to the list box:

- Key Individual
- Family Link to Key Individual

The **Key Individual** content set will be used for the actual key individual. If you want to also set special content for the spouse/partner of key individuals, you can use the **Family Link to Key Individual** content set. This content set will be used for the spouse, regardless of whether the spouse appears in the same box as the key individual or in a separate box to the side.

Individuals in List Button Ind in List...

Click the **Individuals in List** button when you want to select special content for the boxes of individuals that are members of a list. The [List View](#) will open to allow a list or list members to be selected.

Individuals in Query Button Ind in Query...

Click the **Individuals in Query** button when you want to select special content for the boxes of individuals that are in the result set of a query.

Event Type Button Event type...

Click the **Event Type** button when you want to select special content for events of particular event types. The [List View](#) will open to allow an event type list to be selected. In addition to selecting event type lists, you can also select individual event type members on the List View.

An event type content set can control the content for the following:

- Event Parts
- Event Notes
- Added Flag
- Added Icon
- Event Media

Text Content for Primary, Spouse, or Either

Once a match type has been selected, you have a choice as to the content to include when the matching individual is the **primary** individual in the box, or a **spouse**.

- Click **Primary** to view/set content choices for when the matching individual is a primary individual.
- Click **Spouse** to view/set content choices for when the matching individual is a spouse.
- Click **Either** to view/set content choices for whenever the individual appears.

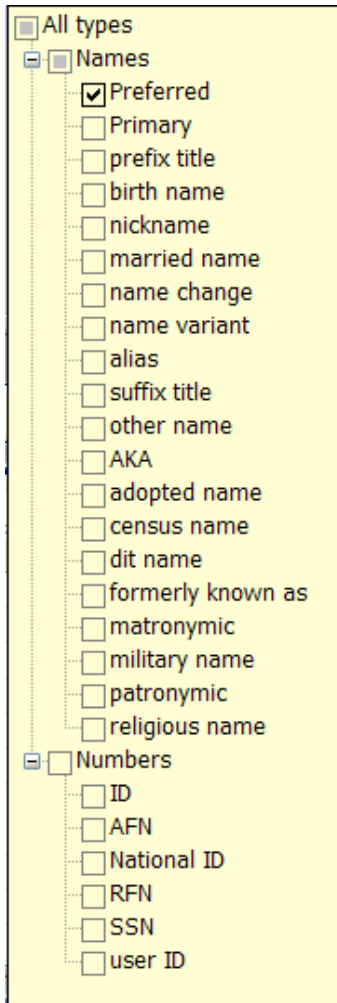
When **Either** is chosen, only the content choices that have been set the **same** for primary and spouse will be shown; the text boxes for other content choices will appear **blank**. Any changes made when **Either** is selected will change the setting for both primary and spouse.

Text boxes will be shown in the secondary font style (typically, gray and italic) and the font and color buttons will be shown borderless to indicate when **no value** has been set for the element in the current content set. The value that you see in these controls is "showing though" from a lower-priority content set (one higher in the list box). Once you make a change to a content control, the text/button will be shown normally, indicating that a special content change has been made for the current content set.

You can **remove** a content setting by pressing the **DEL** key when the control has the focus. The control will then return to showing the value from a lower-priority content set, in the secondary font style.

Identifiers

The **Identifiers** box controls the inclusion of individual names and other identifiers, according to identifier type. All non-hidden identifier types appear on the drop-down check list, arranged in a hierarchy. For example:



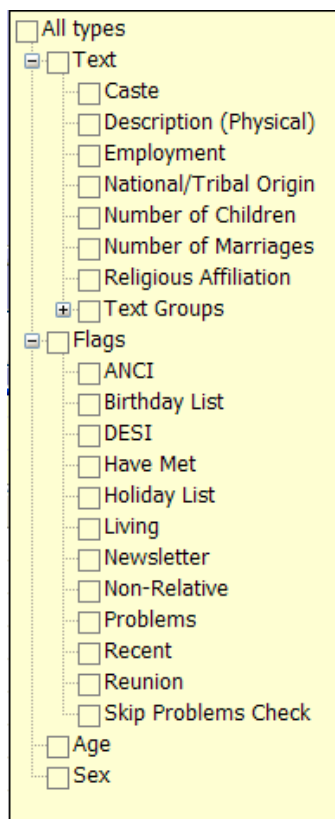
The screenshot shows a hierarchical tree of identifier types within a yellow-bordered box. At the top is a checkbox labeled "All types". Below it is a collapsed checkbox labeled "Names". Expanding "Names" reveals a list of identifier types, each with a checkbox: "Preferred" (checked), "Primary", "prefix title", "birth name", "nickname", "married name", "name change", "name variant", "alias", "suffix title", "other name", "AKA", "adopted name", "census name", "dit name", "formerly known as", "matronymic", "military name", "patronymic", and "religious name". Below the "Names" section is another collapsed checkbox labeled "Numbers". Expanding "Numbers" reveals a list of identifier types, each with a checkbox: "ID", "AFN", "National ID", "RFN", "SSN", and "user ID".

Multiple items can be checked.

The default is **Preferred**.

Attributes

The **Attributes** box controls the inclusion of text attributes, individual flags, age, and sex. All non-hidden text attributes appear on the drop-down check list, arranged in a hierarchy. For example:



Multiple items can be checked.

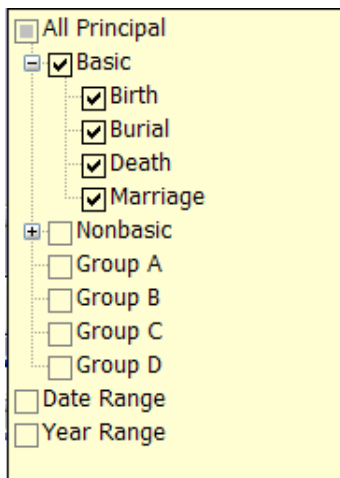
The **Text group** choices refer to the A, B, C, D grouping of event types, as specified on the [Event Types View](#), which is where text attributes are defined.

Note: the text groups A-D define their own set of event types, which **add** to the other checks indicated on the dropdown list. If you include a text group, you may have attributes in the output that you were not expecting. An attribute for an event type that is marked (on the Event Types View) as part of a group (A-D) will appear in the output whenever the group is checked, even when the separate check for the attribute itself is not checked.

The default setting for Attributes is **Omit**.

Events

The **Events** box controls the inclusion of events, according to event type. All non-hidden event types appear on the drop-down check list, arranged in a hierarchy. For example:



Multiple items can be checked.

Choose **principal** to show all events, except for witnessed events and secondary events.

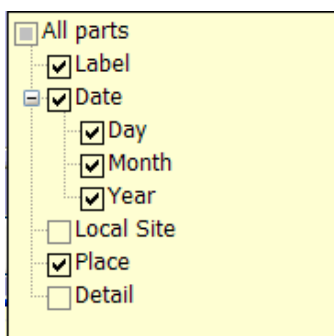
The **Group** choices refer to the A, B, C, D grouping of event types, as specified on the [Event Types View](#). **Date range** will show just the birth and death dates separated by a dash. **Year range** is similar, except only the years of the birth and death dates are shown.

Note: the text groups A-D define their own set of event types, which **add** to the other checks indicated on the dropdown list. If you include a text group, you may have event types in the output that you were not expecting. An event type that is marked (on the Event Types View) as part of a group (A-D) will appear in the output whenever the group is checked, even when the separate check for the event type itself is not checked.

Adding/removing an event type to a group on the Event Types view will affect charts that have a group flag selected for content. Using a saved chart options file with a different database will also affect which event types are included in each of the group flags.

Event Parts

The **Event Parts** box controls the types of data shown for each event. The following choices appear on the drop-down check list for reports:



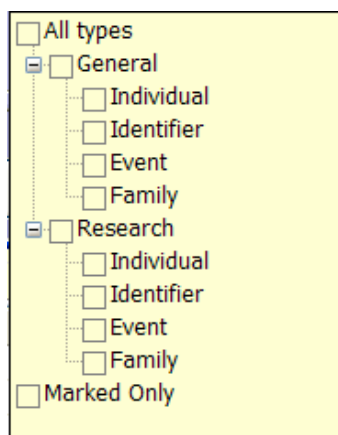
Multiple items can be checked.

The default is **Date**. Choose **Label** if you are interested only in the types of events stored and not the data itself; a label will appear in those boxes where an event record is defined, regardless of the types of data available. For the other choices, if no information of the specified type(s) is stored, nothing is shown for the event.

Notes

The **Notes** box controls the inclusion of general and research notes.

The following choices appear on the drop-down check lists:



Multiple items can be checked.

The default is **Omit**. **Marked only** can be used as a filter of the other note types selected.

Add Flag

A text string can be added by typing the text in the **Add Flag** box. The text will be shown with the "Flags" font style, and will be grouped with the other attribute flags, if included.

Media Content for Primary, Spouse, Family

Multimedia records that are linked to individuals or families can be shown on the chart. They can appear inside and outside the individual boxes, with titles and captions. Separate multimedia choices can be selected for when the matching individual is the primary or spouse, or media can be selected for when the matching individual is either. For when the individual is the primary, family media can also be selected. In addition to multimedia, an icon can also be added.

- To include multimedia, choose a [Picture Placement](#) for Primary, Spouse, or Family.

Add Icon

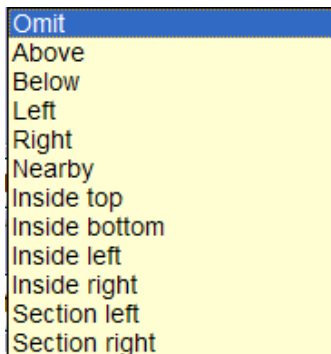
An icon can be added to the chart boxes for individuals in the current group. When you click on the **Add Icon** button, the [Icon Pick Dialog](#) will open. You can select any icon in a separate icon file (extension .ico) or in an executable file (extension .exe, .dll). Genbox is distributed with a large number of icons useful for genealogical charts. They are installed to the subdirectory "icons" beneath the Genbox program directory.

The selected icon will then show on the button face whenever the individual is the primary, or the spouse, or either, depending on the media content setting. If the icon is assigned to just primary or just spouse, the icon face will show blank with "both" is selected.

- To change the icon, click on the button again and make a different selection.
- To remove the icon, click on the button again, click **Cancel** on the dialog, and click **Yes** when prompted "Delete link to icon?".

Picture Placement

The **Picture placement** box provides the following choices on its drop-down list:

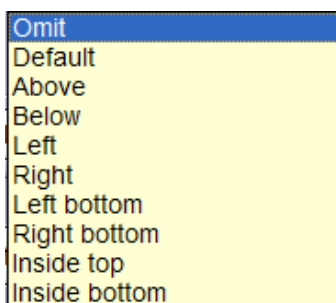


Omit is the default. The next 5 choices produce placements outside of the associated individual box, on the indicated side or, in the case of the **Nearby** choice, whichever side is most convenient. The "Inside" choices produce placements inside the associated individual box. The **Primary/Spouse/Family** choices place the media to the left or right of the indicated section within the box. A chart box can have up to three sections: a primary individual section, a spouse section, and a family section. The media will be sized to fit next to the selected box section, inside the box.

Video multimedia can be selected for inclusion on charts. The still image will be used when printed.

Picture Title and Caption

Pictures appearing outside of the individual boxes may include a title and a caption. The **Title** box and **Caption** box provide the following placement options on their drop-down lists:



Left bottom will be aligned with the left edge of the picture; **Right bottom** will be aligned with the right edge of the picture. The other placements will be horizontally centered.

Inside top and **Inside bottom** will produce placements inside the picture frame, on top of the picture itself. With these placements no extra space is required to display picture titles and captions. You may need to change the font to white or some other light color in order to make it visible in front of a dark picture.

Reset Button

Click the **Reset** button to clear all content settings for the current match type (or reset to default values if the current match type is Default).

Reset All Button

Click the **Reset All** button to remove all match types (except Default) from the match type list box.

Note: Match types are shared by the Content and Styles pages. This button will remove all match types from the list box on the Styles page as well.

Chart Options View: Styles Page

After choosing which individuals to show, the layout for the chart, and the content for each individual, the next choice is the **display style** for the data: the fonts, line styles, colors and shading, and box shapes. The **Styles page** is for this purpose.

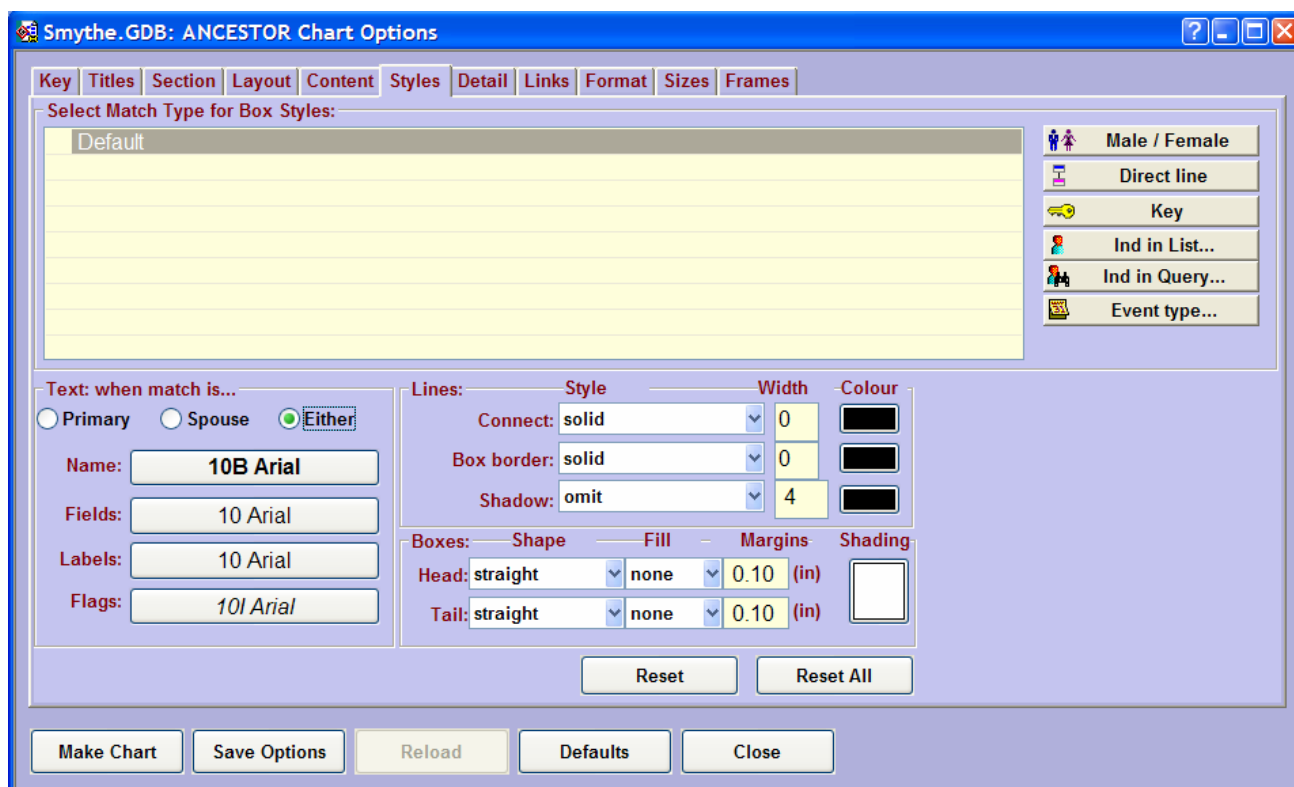
You can vary the styles not only for individual display elements, but also for various groups of individuals. Special styles are excellent for emphasizing certain individuals, lineages, and selected groups.

The Styles page is divided into two parts, like the [Content page](#):

- The top half of the page is for defining and selecting the match types that you want to assign styles to. Several buttons are available for predefined match types. You can also select match types from a list or query.
- The bottom half of the page is for setting the style choices for the currently selected match type.

The match set can be further divided in the bottom half between primary and spouse.

The **Content Page** is the "sister" page to the Styles Page. Both pages always maintain the same list of match types. Defining a match type on either page will automatically cause it to appear on the other page as well. For this reason, you can think of each match type as a "chart/style set" because it is shared by both pages, and can be used for both content and style selection.



The screenshot shows the 'Smythe.GDB: ANCESTOR Chart Options' dialog box with the 'Styles' tab selected. The 'Select Match Type for Box Styles' section has a list with 'Default' selected. On the right, there are buttons for 'Male / Female', 'Direct line', 'Key', 'Ind in List...', 'Ind in Query...', and 'Event type...'. The 'Text: when match is...' section has radio buttons for 'Primary', 'Spouse', and 'Either' (selected), with text boxes for 'Name: 10B Arial', 'Fields: 10 Arial', 'Labels: 10 Arial', and 'Flags: 10I Arial'. The 'Lines' section has dropdowns for 'Style' (solid), 'Width' (0), and 'Colour' (black) for 'Connect', 'Box border', and 'Shadow' (omit). The 'Boxes' section has dropdowns for 'Shape' (straight), 'Fill' (none), 'Margins' (0.10 in), and 'Shading' (white) for 'Head' and 'Tail'. At the bottom are 'Reset' and 'Reset All' buttons. The footer has 'Make Chart', 'Save Options', 'Reload', 'Defaults', and 'Close' buttons.

Match Type List

The **Match Type List** displays all the style sets that have been defined. The style choices for the selected match type will appear on the lower half of the page.

The **order** in which the style sets appear is important: the lower in the list, the higher the priority. You can drag the rows to reorder them.

When an individual box is a member of more than one match type, the specified style choices will be merged. When there is a conflict for the same element, priority will be given to style groups that appear later in the match type list.

Default Match Type

The **Default** match type is always the first match type in the list. It specifies the style options that will be used when no other match type applies to an individual. It also specifies the styles to use when a match type with a higher priority does not set a value for an option.

Male / Female Button Male / Female

Click the **Male / Female** button when you want to vary the styles between males and females on the chart. When selected, two match types will be added to the list box:

- Male
- Female

With these two styles sets, you could, for example, show all males with dark blue text in light blue boxes, and all female with dark red text and pink boxes.

Direct Line Button Direct line

Click the **Direct Line** button when you want to select special styles for the boxes of the direct line ancestors/descendants of the key individuals on your chart. When selected, two match types will be added to the list box:

- Direct Line Individual
- Family Link to Direct Line Individual

The **Direct Line Individual** styles set will be used for the actual direct line individual. If you want to also set special styles for the spouse/partner of direct line individuals, you can use the **Family Link to Direct Line Individual** styles set. This styles set will be used for the spouse, regardless of whether the spouse appears in the same box as the direct line individual or in a separate box to the side.

Key Button Key

Click the **Key** button when you want to select special styles for the boxes of the key individuals on your chart. When selected, two match types will be added to the list box:

- Key Individual
- Family Link to Key Individual

The **Key Individual** styles set will be used for the actual key individual. If you want to also set special styles for the spouse/partner of key individuals, you can use the **Family Link to Key Individual** styles set. This styles set will be used for the spouse, regardless of whether the spouse appears in the same box as the key individual or in a separate box to the side.

Individuals in List Button Ind in List...

Click the **Individuals in List** button when you want to select special styles for the boxes of individuals that are members of a list. The [List View](#) will open to allow a list or list members to be selected.

Individuals in Query Button Ind in Query...

Click the **Individuals in Query** button when you want to select special styles for the boxes of individuals that are in the result set of a query.

Event Type Button Event type...

Click the **Event Type** button when you want to select special styles for events of particular event types. The [List View](#) will open to allow an event type list to be selected. In addition to selecting event type lists, you can also select individual event type members on the List View.

An event type styles set can control all styles, except for name font style.

Text Fonts for Primary, Spouse, or Either

Once a match type has been selected, you have a choice as to the styles to display when the matching individual is the **primary** individual in the box, or a **spouse**.

- Click **Primary** to view/set style choices for when the matching individual is a primary individual.
- Click **Spouse** to view/set style choices for when the matching individual is a spouse.
- Click **Either** to view/set style choices for whenever the individual appears.

When **Either** is chosen, only the font style choices that have been set the **same** for primary and spouse will be shown; the font styles for other text field choices will appear **blank**. Any changes made when **Either** is selected will change the setting for both primary and spouse.

Font style buttons will be shown borderless to indicate when **no value** has been set for the font style of the corresponding data field in the current style set. The font style value that you see on these buttons is "showing though" from a lower-priority style set (one higher in the list box). Once you make a change to a font style, the button will be shown normally, indicating that a special font style change has been made for the current style set.

You can **remove** a style setting by pressing the **DEL** key when the control has the focus. The control will then return to showing the value from a lower-priority style set, in the secondary font style.

Family Box Styling

With the exception of the spouse text font styles, all box styles are determined by the primary individual in the box. If there are spouses shown in the same box, they will not affect the box styles.

Text Font Buttons

There are four font buttons, each for a different subset of the text in the chart boxes:

- Name
- Fields
- Field Labels
- Flags

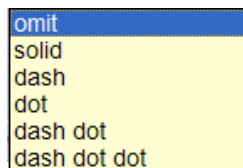
Choosing **bold** fonts for the **Name** of the primary and **Spouse** makes them stand out. The **Flags** are normally shown in a different font style from **Fields** and **Field labels**, such as *italics*.

You can set the font styles differently for the Primary and Spouse. You could set all spouse fonts to show in blue, for example.

Connect Line Styles

The **connecting lines** are the lines drawn from child to parent, and from individual to spouse.

The **Style** choices available on the drop-down list for connecting lines are:



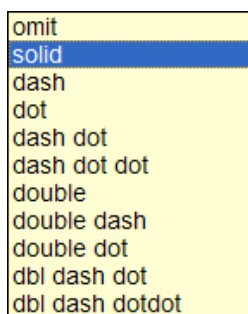
The **Width** box is used to set the pixel width of the lines. A value of 0 indicates to draw the lines as narrow as possible.

The **Color** box can be used to set the color of the connecting lines.

Box Border Styles

Box borders can be styled, unless **Unboxed** is checked on the [Layout page](#).

The **Style** choices available on the drop-down list for box borders are:



The **Double** styles produce a double-line border.

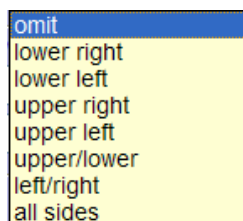
The **Width** box is used to set the pixel width of the borders. A value of 0 indicates to draw the box borders as narrow as possible.

The **Color** box can be used to set the color of the box borders.

Box Shadow Styles

Boxes can have simulated **shadows**, unless **Unboxed** is checked on the [Layout page](#).

The **Style** choices on the drop-down list specify which sides to show the shadow:



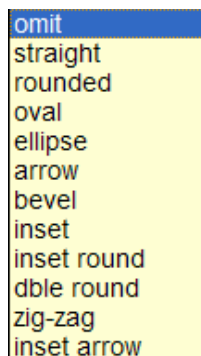
The **Width** box is used to set the pixel width of box shadows. A value greater than 0 is necessary to see the shadow.

The **Color** box can be used to set the color of the box shadow. The default is black.

Box Head and Tail Shapes

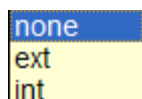
Boxes on rectangular charts don't have to be rectangular! Using a different shape immediately adds interest and draws attention. Box shapes can be specified independently for the **head** and the **tail** of the box. The **head** is the side of the box that is headed in the drop direction. The **tail** is the opposite side.

The choices available on the drop-down lists for head and tail shapes are:



Box Corner Fill

Box corners can be **filled** with the **Box border color**, for added visual effect. Choices on the drop-down list are:



External filling means the corner area **outside** the box shape is filled, up to the enclosing rectangle. This choice only has an effect when nonrectangular box shapes are selected.

Internal filling means the corner area **inside** the box shape is filled. The effect of this choice varies, depending on the box shape selected.

Box Margins

The **Box head and tail margins** control the amount of internal space that is placed between the (rectangular) box edges and the text. The default is one-tenth of an inch. Internal box margins are specified on this page because they often need to be increased for certain box shape selections, in order to keep the text from extending outside the visible box borders.

- The margins for the box **sides** will be the larger of the **head** and **tail** margin settings.

Box Shading

The **Box shading** button displays the color for the box background on its face. Click the button to choose a different color.

- Keep in mind the font colors when choosing the box shading color. If the fonts are dark, the shading color should be a light shade, so that the text will still be readable.

Reset Button

Click the **Reset** button to clear all style settings for the current match type (or reset to default values if the current match type is Default).

Reset All Button

Click the **Reset All** button to remove all match types (except Default) from the match type list box.

Note: Match types are shared by the Content and Styles pages. This button will remove all match types from the list box on the Content page as well.

Chart Options View: Detail Page

The **Detail page** contains content options for specific details of the data. While the [Content](#) and [Styles](#) pages specify options for chart boxes according to groups of individuals, the Detail page options apply to boxes in all individual groups, and the chart as a whole.

The screenshot shows the 'Smythe.GDB: ANCESTOR Chart Options' dialog box with the 'Detail' tab selected. The 'Place Detail' section has 'All levels' selected, and all checkboxes for place levels [6L] through [0L] are checked. The 'Family Box Pairs - Duplicate Spouse Data' section has 'Omit spouse data' selected for both 'When adjacent' and 'When not adjacent'. At the bottom are buttons for 'Make Chart', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Place Detail

Places can appear with all place levels or with only specific place levels. The default operation is to show all place levels except for the default nation/area.

There is a checkbox for each place level, one for place modifiers, and two for special combinations:

- [6L] Nation/Area
- [5L] State/Province
- [4L] County
- [3L] Township
- [2L] City
- [1L] Local site
- [0L] Place Modifier
- [LH] "Level High" (lowest of {5,6})
- [LL] "Level Low" (lowest of {2,3,4})

When a place level is not checked, no place information for that jurisdiction will be shown on the chart.

Note: The [LH] and [LL] options prevent the use of the other level selectors.

Place Detail: All Levels

When this option is checked, all place information will be shown on the chart.

Place Detail: Low + High

When this option is checked, only the [LH] and [LL] check boxes will be set. This pair produces a "City, State" combination for most place names. It can be selected to save space on the charts.

Level Low ([LL])

When you select the [LL] ("Level Low") check box, Genbox will select the city name (level 2) when it is available, or the township name (level 3) when it is available, or finally the county name (level 4). Only one level of information will be shown from the group {2,3,4}.

Level High ([LH])

When you select the [LH] ("Level high") check box, Genbox will select the state name (level 5) when it is available, otherwise the nation/area name (level 6). Only one level of information will be shown from the group {5,6}.

Family Box Pairs - Duplicate Spouse Data

A family box pair is two chart boxes linked with a marriage link. Each box contains the data for a spouse. You can optionally include some or all of the data for the other spouse as well, if you think that would make the chart more readable.

Family box pairs can be adjacent to each other. This occurs when the "Single Box for Couples" layout setting is set to "No". They can also be widely separated on the chart. This can happen when both spouses have ancestor links.

For both adjacent and non-adjacent family box pairs, the pick list choices are:

Omit spouse data
Full spouse data
Spouse name only

Choosing either "Full spouse data" or "Spouse name only" on non-adjacent family boxes can help make a chart more readable, because the spouse information is readily available without needing to follow a potentially long marriage link line. For adjacent family box pairs, the default is "Omit spouse data".

Note: Regardless of this setting, the marriage information appears in only one box. It will appear in the box that contains the children link, if any.

Chart Options View: Links Page

The **Links page** contains formatting options for links on the chart. The **links** are the connecting lines drawn between boxes, and their labels.

The screenshot shows the 'Smythe.GDB: ANCESTOR Chart Options' dialog box with the 'Links' tab selected. The dialog has a menu bar with 'Key', 'Titles', 'Section', 'Layout', 'Content', 'Styles', 'Detail', 'Links', 'Format', 'Sizes', and 'Frames'. The 'Links' tab contains the following options:

- Partners:** (normal) (dropdown menu)
- Non-birth parents:** Wavy+Label (dropdown menu)
- Descendant stubs:** Arrow (dropdown menu)
- Show dashed for surety:** (none) (dropdown menu)
- Cross-links:** Dashed (dropdown menu)
- Link Label Font:** 8 Arial (text box)
- Link Cross Reference Font:** 10B Arial (text box)

At the bottom of the dialog are five buttons: 'Make Chart', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Partners

When a family is designated as **Partners**, special styles can be applied to the link lines from individual to spouse, as specified on the drop-down list:

The screenshot shows the dropdown menu for the 'Partners' option. The menu is open, showing the following options: (normal), Labelled, Wavy, Jagged, Wavy+Label, and Jag+Label. The '(normal)' option is currently selected and highlighted in blue.

Non-birth Parents

When the child to parent relationship is something other than biological, special styles can be applied to the link lines, as specified on the drop-down list:

The screenshot shows the dropdown menu for the 'Non-birth Parents' option. The menu is open, showing the following options: (normal), Labelled, Wavy, Jagged, Wavy+Label, and Jag+Label. The '(normal)' option is currently selected and highlighted in blue.

Descendant Stubs

Descendant stubs can be included on charts to indicate that there are additional descendant individuals, but they have been omitted from the chart. This layout choice is selected on the [Layout page](#). The styles available for stubs appear on the drop-down list:

Line
Slash
Arrow
Line+Label
Slash+Label
Arrow+Label
Line+Box
Slash+Box
Arrow+Box

Show Dashed for Surety Levels

The **surety** of spouse links and child to parent links can be shown by varying the line style between solid and dashed. The choices for which surety levels appear dashed are on the drop-down list:

(none)
0 Undetermined
1 Marginal
2 Probable
3 Assemblage
4 Convincing
0 - 1
0 - 2
0 - 3
0 - 4
1 - 2
1 - 3
1 - 4

0 - 1: Undetermined to Marginal
 0 - 2: Undetermined to Probable
 0 - 3: Undetermined to Assemblage
 0 - 4: Undetermined to Convincing
 1 - 2: Marginal to Probable
 1 - 3: Marginal to Assemblage
 1 - 4: Marginal to Convincing

Cross-Links

A **cross-link** is a family link drawn between a family box pair that crosses other links. Cross-links appear when the chart layout prohibits drawing the link without crossing other links.

Choices for the display of cross-links are:

Omit
Dashed
Cross-reference

The **Cross-reference** choice produces labels of the form "(A)", "(B)", "(C)", etc. for each cross-link. The labels appear on short stubs beneath the boxes being linked. No line is drawn between each pair. This option is attractive when the cross-links become a distraction when attempting to read the chart.

Link Label Font

Use the **Link Label Font** button to specify the font for link labels. Typically, a small font size is used (8 points or smaller) for link labels.

Link Cross Reference Font

Use the **Link Cross Reference Font** button to specify the font for cross-reference link labels. Specifying a color is particularly helpful in spotting these labels when reading a chart. The default color for the cross-reference link label font is red. This font is also used for the reference text in [Duplicate Ancestor](#) boxes.

Chart Options View: Format Page


The **Format page** contains a variety of formatting options for the chart. While the [Content](#) and [Styles](#) pages specify options for chart boxes according to groups of individuals, the Format page options apply to boxes in all groups, and the chart as a whole.

The screenshot shows the 'Format' tab of the 'Tilyards.GDB: ANCESTOR Chart Options' dialog. The tabs at the top are: Key, Titles, Section, Layout, Content, Styles, Detail, Links, **Format**, Sizes, and Frames. The 'Format' tab contains several sections:

- Background Graphic:** A text box for a filename and a 'Stretch' checkbox.
- Event Templates:** Two dropdown menus for 'Basic events' and 'Other events', both set to 'Abbreviate'.
- Colour boxes by generation:** A dropdown menu set to 'None' and a 'Defaults' button. Below are two rows of color swatches labeled 'Border' and 'Shade' with numbers 1 through 6.
- Pictures:** A 'Body' dropdown set to 'show' and a 'Connecting Line' checkbox.
- Box Format:**
 - 'Align text' dropdown set to 'Left'.
 - 'Spouse label' dropdown.
 - 'Dim text for surety levels' dropdown set to '(none)'.
 - Checkboxes for 'Format notes as plain text', 'Show generation level #'s, 'Hide label-only content' (checked), 'Label missing basic events', 'Ind IDs', 'Short dates' (checked), 'Short names', and 'Short places' (checked).

At the bottom are buttons for 'Make Chart', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Background Graphic

A chart can have a **background graphic** that lies "behind" the boxes. Type the filename of the image file into the text box, or click the **Open File** button  to browse for the file.

The picture will be sized until its height or width matches that of the chart. The aspect ratio will be maintained by default.

- To make the picture completely fill the chart background, click the **Stretch** button.

Tip If a **Chart frame** is selected on the [Frames page](#), the picture will assume the shape of the inner chart frame.

Event Templates

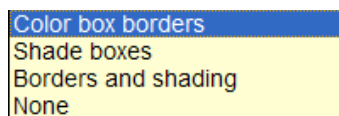
The event labels used for basic events and other events can be independently selected from the following list:

Abbreviate
Brief

Color Boxes by Generation

Box borders and interiors can be colored according to generation, to highlight the different generations on a chart. This feature is particularly useful when the **Generational alignment** on the [Layout Page](#) is set to "Relaxed".

The choices available on the drop-down list are:



There are two rows of six color buttons each, with the top row to specify the **box border** colors, and the bottom row to specify **box shading** colors. The colors will be used in sequence for each generation, only repeating after all six colors have been used.

- To change the color used for a generation, click its color button to open the [Select Color Dialog](#).
- You can click the **Default** button to set all the color buttons to the default values.

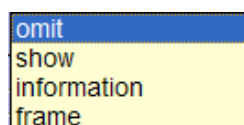
Note If used, this control will override the box color choices on the [Styles page](#).

Pictures: Connecting Line

On the [Content page](#), multimedia can be selected for placement outside of the associated individual box, either above, below, left, or right. If you would like a connecting line to be drawn from the picture to the associated box, click the **Connecting line** check box.

Pictures: Body

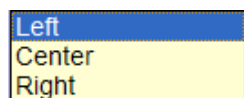
When printing drafts of a chart, you may wish to **omit** the body of pictures, to save on ink and decrease printing time. Or, you may intend to tape the actual photographs to the printed chart, so you don't need a printed image. The **Body** box allows you to select these features. The choices on the drop-down list are:



For **omit**, no media appears on chart, and no space is reserved. Choose **show** for normal operation. The **Info** choice will print the image filename and other related information inside a simple frame, instead of the picture. The **frame** choice will print only a simple frame.

Box Format: Text Alignment

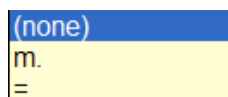
The **Text alignment** box provides choices for text horizontal alignment inside the individual boxes:



Left is the default.

Box Format: Spouse Label

When family boxes are used, the name of the spouse appears in the same box as the primary individual. Normally, there is no label before the name of the spouse. The **Spouse label** box provides choices for a label:



You can also type in your own text for the label.

Box Format: Dim Text for Surety Levels

The surety level on data inside an individual box can be indicated by showing the text in gray. The **Dim text for surety levels** box provides a choice of the following surety level combinations to show with dimmed text:

(none)	
0 Undet.	
1 Marginal	
2 Probable	
3 Assemblage	
4 Convincing	
0 - 1	0 - 1: Undetermined to Marginal
0 - 2	0 - 2: Undetermined to Probable
0 - 3	0 - 3: Undetermined to Assemblage
0 - 4	0 - 4: Undetermined to Convincing
1 - 2	1 - 2: Marginal to Probable
1 - 3	1 - 3: Marginal to Assemblage
1 - 4	1 - 4: Marginal to Convincing

Box Format: Check Boxes

A number of check boxes are provided for various format options for text inside individual boxes.

Format notes as plain text

Click this check box to show the notes text without any special formatting (bold, italics, underline).

Show generation level numbers

Click this check box to include the generation number in the box.

Hide label-only content

Click this check box to suppress lines for events that have no data content to display, other than the event type label. For example: suppose the event parts selected for output on a chart are "Label, Date". That means the chart should display the event type label and the event date for each event. Only event dates are shown; event places should be omitted from the chart. Now suppose there is an event record for an individual's "birth" that includes the place of birth, but the birth date has been left blank. Since chart options is restricting event parts to "Label, Date", then for this event, only the event label ("b.") will be output.

This empty line is often undesirable. To get rid of these label-only lines, click **Hide label-only content**.

Label missing basic events

Click this check box when all boxes should include a line for birth, death, and marriage, even if no data records for these events are stored. This option is useful when you want to leave space for others to write this information on the chart.

Name IDs

Click this check box to include the name IDs for all individuals.

Short dates

Click this check box to show dates in the **short date** format.

Short names

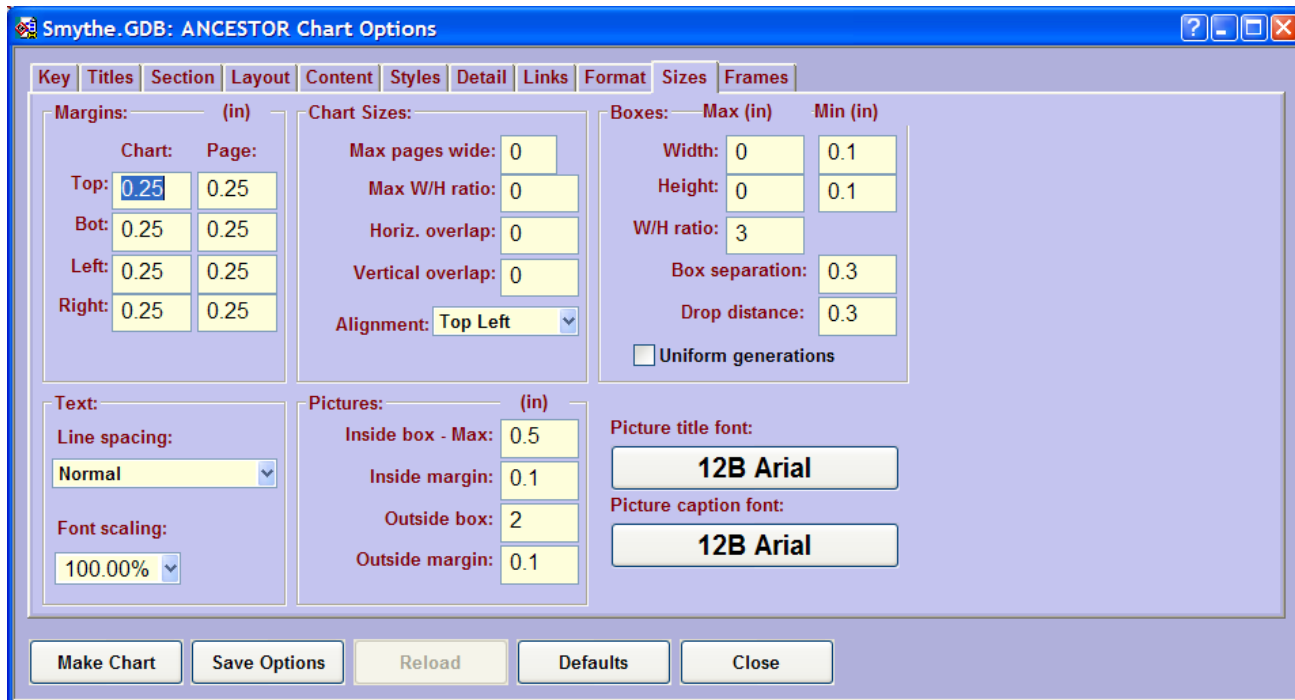
Click this check box to show individual names in the **short name** format. This format abbreviates middle names.

Short places

Click this check box to show places in the **short place** format. This format uses identified short names for each place level.

Chart Options View: Sizes Page

Genealogy charts can be huge. Without careful selection of content, layout, and sizing, the resulting size of the chart may be impractical. You may be able to view it fine on the screen, but printing it out, assembling it, and finding a place to display it can be another matter. The **Sizes** page is an important tool for controlling the overall size of the chart. You will find that changing settings on this page can affect the size of your chart dramatically. Not only the size, but the aspect ratio can be altered. If your chart is too short and wide, you can make it taller and narrower.



The screenshot shows the 'Smythe.GDB: ANCESTOR Chart Options' dialog box with the 'Sizes' tab selected. The dialog has several sections for configuring chart dimensions and appearance.

Margins: (in)		Chart Sizes:		Boxes: Max (in) Min (in)	
Chart:	Page:	Max pages wide:	0	Width:	0 0.1
Top: 0.25	0.25	Max W/H ratio:	0	Height:	0 0.1
Bot: 0.25	0.25	Horiz. overlap:	0	W/H ratio:	3
Left: 0.25	0.25	Vertical overlap:	0	Box separation:	0.3
Right: 0.25	0.25	Alignment:	Top Left	Drop distance:	0.3
		<input type="checkbox"/> Uniform generations			

Text:		Pictures: (in)		Picture title font:	
Line spacing:	Normal	Inside box - Max:	0.5	12B Arial	
Font scaling:	100.00%	Inside margin:	0.1	Picture caption font:	
		Outside box:	2	12B Arial	
		Outside margin:	0.1		

Buttons at the bottom: Make Chart, Save Options, Reload, Defaults, Close.

Chart Margins

The top, bottom, left, and right **Chart margins** control the white space around the outside edge of the chart.

Page Margins

The top, bottom, left, and right **Page margins** control the white space around the outside edge of each **printed** page. The page margins do not show when viewing the chart onscreen. However, the divisions that will be used for pages do show as an overlay of dashed lines. As you increase the page margins, you will see that the page divisions become closer together, because less will fit on each page.

Max Pages Wide

Use the **Max pages wide** setting to force the chart to a certain size. The entire chart will be scaled down in order to make it fit the specified number of pages wide.

You may wish to limit the size of a chart when printing draft charts, and then return to normal size when making your final copy. This can save on paper and printing time, and produce a chart that's easier to handle while you are checking its contents.

A value of 0 (the default) will disable this option.

Chart Max Width/Height Ratio

Use the **Max width/height ratio** to control the aspect ratio of the chart as a whole. A value of "3", for example, means that the chart can be no wider than three times its height. When used, the boxes will be narrowed, or more boxes will be arranged vertically, until the specified ratio is achieved.

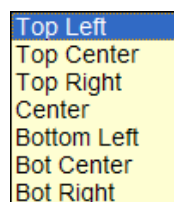
A value of 0 (the default) will disable this option.

Horizontal and Vertical Overlap

When printing charts on multiple pages for later assembly, sometimes it is helpful to have a small amount of the chart shown on the edge of one page to be repeated on the next page. This area of **overlap** can make it easier to trim and tape the pages together, because the trimming doesn't need to be as accurate. The **Horizontal overlap** and **Vertical overlap** boxes are for entry of the overlap amounts.

Alignment

The **Alignment** box allows you to control how the chart is positioned on its group of pages. You may find that the last row or column of pages contain only a small portion of the chart, making it appear off-center. The choices available for alignment are:



Box Width and Height

Genbox sizes chart boxes according to their contents: boxes with more content are larger than boxes with less content. The **Box width** and **Box height** boxes for **maximum** and **minimum** sizes allow you to limit this automating sizing. Entering a minimum value will force small boxes to be larger. Entering a maximum value for either height or width will force large boxes to grow in the other dimension. Entering a maximum value for both height and width may cause data in some boxes to be omitted. You can produce a chart with boxes of a fixed width or height by setting Max and Min to the same value.

A value of 0 indicates the size is unlimited.

Box Width/Height Ratio

You can control the sizing of chart boxes in a relative way with the **Box width/height ratio** box. For example, a value of "3" (the default) will limit the width of chart boxes to be no more than three times their height. When boxes start to become too wide, the text will be wrapped, making the box taller.

Enter a value of 0 to allow unlimited box aspect ratios.

Box Separation

Box separation refers to the distance between boxes on the chart that are in each generational row (or column). Decreasing the box separation will bring all of the boxes closer together.

Drop Distance

Drop distance refers to the distance between generations. This is the spacing between parent boxes and children boxes. Decreasing this value will bring generations closer together.

Uniform Generations

When **Uniform Generations** is checked, all boxes on each generational level will be sized to the largest box on that level. The uniform sizing is in the direction of drop only. This can create a neat appearance for some types of charts. Setting this option does not increase the overall size of the chart.

Line Spacing

The text lines in a chart box have a default vertical spacing, determined by the font. You can override the **normal** setting and have lines drawn closer together, making the boxes smaller in the vertical direction. Depending on the font choices, clarity may become a problem. The **Line spacing** choices available are:

Normal
Compressed 5%
Compressed 10%
Compressed 15%
Compressed 20%

Font Scaling

Changing this value will affect all fonts on the chart. Enter any percentage value, or choose from the drop-down list:

25%
50%
75%
80%
85%
90%
95%
100%
105%
110%
115%
120%
125%

You can also reduce the size of a chart with the [Max Pages Wide](#) setting. The difference is that Font scaling affects only fonts, while the Max Pages Wide setting affects all elements.

You may wish to drastically reduce the font scaling when printing draft charts, and only returning to normal size when making your final copy. This can save on paper and printing time, and produce a chart that's easier to handle while you are checking its contents.

Pictures - Sizing

Pictures can appear in two types of places on a chart: inside of the individual boxes next to the text, and outside of the individual boxes. The **Inside box - Max size** box is used to specify the size of pictures when they appear inside individual boxes. The value entered will be used for both the maximum height and maximum width. The **Outside box - Max size** box is used to specify the size of pictures when they appear outside individual boxes. Pictures outside can be shown larger.

The **Inside margin** value is used to specify the white space separating the box text from the picture when a picture appears inside an individual box.

The **Outside margin** value controls the white space separating the title and caption text from the picture edges.

Pictures - Fonts

The **Title font** and **Caption font** buttons allow you to specify the fonts for title and caption text for pictures on the chart.

Chart Options View: Frames Page

As the finishing touch, **frames** can be added to the chart, picture boxes, title box, and legend. Frames are excellent for setting off an item from its surroundings, adding color and drawing attention. Frame choices include corner shape, corner fill, sides to include, pixel width, color, corner size, margin size, matte, shading, and shadow. The chart frame can also be a double frame, with independent settings for each. These options are set on the **Frames** page.

The screenshot shows the 'Smythe.GDB: ANCESTOR Chart Options' dialog box with the 'Frames' tab selected. The dialog has a tabbed interface with tabs for Key, Titles, Section, Layout, Content, Styles, Detail, Links, Format, Sizes, and Frames. The Frames tab contains settings for four elements: Chart Frame, Pictures, Titles, and Legend. Each element has an 'Include' checkbox and a set of options for Corner Shape, Fill, Sides, Width, Colour, and Sizes (in). The Chart Frame section has 'Outer' and 'Inner' settings. The Pictures, Titles, and Legend sections have 'Frame' and 'Matte' settings. The 'Include' checkbox for the Legend is checked. At the bottom are buttons for 'Make Chart', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Element	Include	Corner Shape	Fill	Sides	Width	Colour	Sizes (in)
Chart Frame	<input type="checkbox"/>	Outer: inset	<input type="checkbox"/>	all	4	black	0.5 corner
		Inner: straight	<input type="checkbox"/>	all	4	black	0.5 marg
Pictures	<input type="checkbox"/>	Frame: straight	<input type="checkbox"/>	all	0	black	0.2 corner
		Matte: []	Shadow: omit	4	black	0	matte
Titles	<input type="checkbox"/>	straight	<input type="checkbox"/>	all	2	black	0.1 marg
		Shading: []	Shadow: omit	8	black		
Legend	<input checked="" type="checkbox"/>	straight	<input type="checkbox"/>	all	2	black	0.1 marg
		Shading: []	Shadow: omit	8	black		

Chart Frame

Check the **Include** check box to produce either a single or double **Chart frame**. The chart frame runs around the outside edge of the chart, with all boxes appearing inside the frame. A double chart frame will be drawn with independent option settings for the outer and inner frame. Depending on the [Corner shape](#) and [Corner margin](#) size, the frames may overlap, producing a complex design.

Picture Box Frames

Pictures positioned outside of individual boxes have a thin line rectangular frame by default. You can use the options here to create more elaborate frames.

Title Box Frame

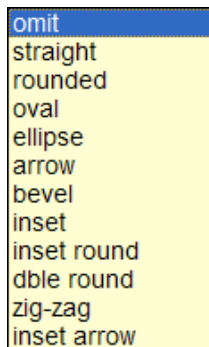
When chart titles have been selected for output, you can click the **Include frame** check box to include a frame around the titles.

Legend Box Frame

When a chart legend has been selected for output, you can click the **Include frame** check box to include a frame around the legend box.

Corner Shape

The choices available on the drop-down lists for corner shapes are:

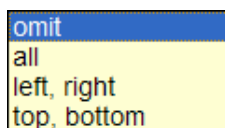


Corner Fills

Frame corners can be **filled** with the **Frame color**, for added visual effect. Click the **Corner fill** check box to select.

Sides to Include

Individual sides of the frame can be selected from inclusion. Choices from the drop-down list are:

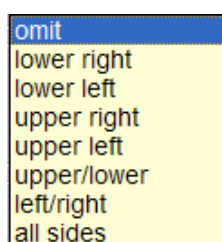


Frame Width

The **Frame width** boxes allow entry of the pixel width for the frame. A value of 0 means use the narrowest line possible.

Shadows

Picture boxes, the title box, and the legend box can have a simulated **shadow**. The **Shadow placement** boxes provide the following placement choices:



Colors for Frame, Matte, Shadow, Shading

There is a **Color** button to select the color for each frame and shadow. Pictures have an additional **Matte** color button. The matte is the open area between the frame and the picture. The title and legend boxes also have a **Shading** color button. The shading color will fill the box behind the text. Clicking any of these color buttons will open the [Select Color Dialog](#) for selection of the color.

Sizes for Corners, Margins and Matte

The **Corner size** specifies the size of the corner area of the frame. The corners can have special shapes. A larger corner size value will produce larger shapes.

The **Margin size** is the amount of white space between the (rectangular) frame and its contents. This value may need to be increased when the frame is not rectangular, as some choices for corner shape can result in a visible frame that extends into the text inside the frame.

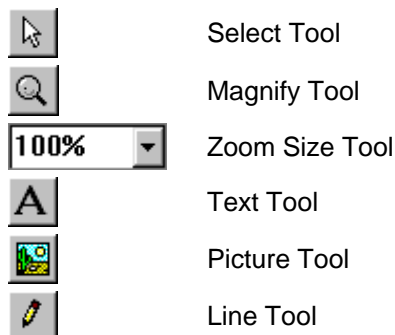
The **Matte size** specifies the size of the matte used with picture frames. The matte is the open area between the frame and the picture. A value larger than zero is necessary in order to see the matte color.

Chart View


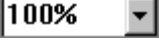
The **Chart View** appears when a chart is generated by clicking the **Make Chart** button on the [Chart Options View](#). The generated chart will be shown in the view, centered on the box of the key individual. When the chart is larger than the visible area, you can use the scroll bars at the right and bottom edges to scroll.

Using the Chart/Report Toolbar

When the Chart View opens, the [Chart/Report Toolbar](#) will appear next to the main toolbar. There are five tool buttons and a drop-down list box. The current tool will have a pressed appearance. Click on a tool button to select a tool:



Zooming

When you want to see more of your chart at once, you need to **zoom out**. If you are interested in seeing more detail in a small area, you need to **zoom in**. To zoom, use the Magnify Tool  or the Zoom Size Tool .


Finding Data

When a large chart is produced, it can be a challenge to maneuver to the location of interest using just the zoom tools and scrollbars. Another way is available. When you right-click on the chart, a popup-menu will appear, which includes the following items:

- Find ...
- Find Again
- Find Reverse

When you select **Find**, the Chart Find Data Dialog appears. You can enter a name, ID, or any text that you want to search for, for a specified chart box type or any box type.

Selecting Chart Boxes

- To **select chart boxes**, first click on the Select tool .
- Click on the box you want to select. A selected box will be shown with **handles** at the corners and sides.
- You can also **drag a selection rectangle** around a group of boxes that you want to select.

Viewing Chart Properties

- To **view the properties for a chart**, right-click the mouse on an open area of the chart
- From the pop-menu, select **Chart Properties**.


The [Chart Properties Dialog](#) will open, showing information about the current chart.

Viewing Box Properties


- To view the properties for a chart box, first select it.
- Right-click the mouse to bring up the popup menu.
- Select **Box Properties** from the menu.

The [Chart Box Properties Dialog](#) will open, showing the box type, primary individual's name, ID, and date range. If there is a spouse in the box, the name, ID, and date range of the spouse will also be shown. The page number on which the box sits is also shown.

Adding Annotations

Annotations are short lengths of text that can be typed on top of the chart. They can be used to draw attention to certain data items, or provide explanatory text. They are added with the Text Tool .

Adding Lines

Freehand lines can be added to a chart after it has been generated. You can draw arrows, circle boxes, and draw connecting lines between annotations and boxes. Lines are added with the [Line Tool](#) .

Adding Pictures

Additional pictures can be added to a chart after it has been generated. They are added with the [Picture Tool](#)



- To add a picture to a chart, click the **Picture Tool**.
- On the chart, click where a corner of the picture should start, and drag the pointer to the diagonally opposite corner to define the desired rectangle.
- If a database is open, the **Media Pick Dialog** will open and you will be prompted to select a picture from the Media Library for that database. You can also click the **Add File to Library...** button on the dialog if you want to use a different picture from the file system.
- If a database is not open, you will be prompted to select a media file from the file system.
- If you click **Cancel**, a frame will be added without a picture. This can be a useful background for an annotation, "callout box", or other purpose.

When a picture is inserted into the chart, the rectangle selected by dragging the pointer will be used to size and place the picture. Because the aspect ratio is always maintained on inserted pictures, the actual size may be narrower or shorter than the selected rectangle. If a position on the chart is clicked with the Picture Tool but no rectangle is drawn by dragging the pointer, a default rectangle will be used instead.

You can click and drag your picture selection rectangle on top of an existing box. This results in a picture placement that appears to be "inside" the box.

Adding Linked Objects

In addition to lines, text, and pictures, virtually any document on your computer can be inserted as a link on a chart. For example: you may have a Microsoft Word document that provides some interesting background details on the people or locations that are named on your chart. You could include this document into an open area on your chart. You can move it and size it just like any other object on the chart.

- To insert a link to an object on your chart, choose **Insert New Object** from the **Edit Menu**.
- When the dialog appears, click **Create from file**.
- Enter the path to the file, or click the **Browse...** button and select the file.
- Click the **Link** check box.
- Click **OK**.

The original application will generate an image of the document, then the image will appear at the top left corner of the chart in its original size. You can **drag** the object from any point on its interior to the desired location. You can also drag any of its corners or edges to **size** the object.

Sizing Boxes

- To size a chart box, first select it.

- Drag one of the side or corner handles to the desired new size.

Dragging a side handle will preserve the size of the opposite dimension. Dragging a corner will preserve the location of the diagonally opposite corner. The link lines will be resized to match.

Moving Boxes

- **To move a chart box**, first select it.
- Click on the **center** of the box and drag it to the desired location.

The link lines will follow the moved boxes.

Deleting Boxes

- **To delete a box or group of boxes**, first select them.
- Select **Cut** from the Edit menu, or press the **Delete** key.

When boxes are deleted, any link lines connected to them are also deleted.

Hiding Leaves

Sometimes it is helpful in understanding the link structure of a complex chart to be able to "strip away" the "leaf" boxes. A leaf box is a box with no descendants, no marriage links, and no attached boxes (attached boxes include media boxes, annotations or lines).

- **To hide all the leaf boxes on the chart**, choose "Hide Leaves" from the right-click popup menu.

This operation can be performed repeatedly, each time removing the boxes that became leaves after the previous set of removals.

Making the Frame Snug

Fan Charts

A fan chart is initially drawn with space for the full portion of a circle selected-- either 90, 180, or 360 degrees. Depending on the actual data selected for output, there may be portions of this reserved area that are blank. A more appealing chart can be produced by "closing up" this unused space between the actual chart and the frame. To do this, right-click on the fan chart and choose the option **Make Frame Snug**.

Rectangular Charts

For rectangular charts, the chart frame will resize automatically in most cases, whenever an edge box is resized, moved, or deleted. You can choose **Make Frame Snug** from the right-click menu in case the automatic resizing did not occur.

Undoing the Last Operation

To undo the last chart edit operation (which could be moving a box or group of boxes, deleting a box or group of boxes, sizing a box, adding a picture box or annotation, hiding leaves, etc.), press **CTRL+Z**. You can also select "Undo" from the Edit Menu. Selecting "Undo" a second time will restore the last edit operation.

Report Options View

Genbox can produce **reports** of your genealogical data. Reports are rich text documents that can be viewed and edited in a word processor, or web pages that can be viewed in a browser and uploaded to the web. Reports can be narrative text, fill-in-the-blank forms, indented lists, tables, envelopes, or labels. They sometimes include graphical lines, and can include images.

Genbox produces several types of reports:

- [Ancestor Narrative](#)
- [Pedigree](#)
- [Descendant Narrative](#)
- [Outline Descendant](#)
- [Family Group](#)
- [Individual Narrative](#)
- [Calendar](#)
- [Custom](#)

There are many options for each report type, organized onto pages. Some pages are only available for certain report types. Most pages are similar for each report type:

[Key Page](#)
[Front Page](#)
[Sections Page](#)
[Back Page](#)
[Headings Page](#)
[Content Page](#)
[Content Page \(Custom Reports\)](#)
[Content Page \(Calendar Reports\)](#)
[Sort Page \(Custom Reports\)](#)
[Media Page](#)
[Media Page \(Calendar Reports\)](#)
[Style Page](#)
[Detail Page](#)
[Format Page](#)
[Frames Page](#)

There is a row of buttons at the bottom of the view:

- Click **Make Report** when you are ready to produce the report.
- Click **Save Options** to save your settings to a named options file that you can load again later. You will be prompted to select a filename.
- Click **Reload** to restore the settings to the way they were the last time the options file was saved.
- Click **Defaults** to reset all of the settings to Genbox defaults for the current report type. The defaults are the same options as used by the **Basic** menu choice.
- Click **Close** when you are done with the Report Options View.

Make Report Button

When you choose **Make Report**, a progress window will be displayed, then the [Report View](#) will open and display the generated report. The **Report Options View** will still be open, but it will be behind the Report View. After you close the Report View, you will see the Report Options View again. You can make further changes to the options, then choose **Make Report** again. You can repeat this cycle until you are satisfied with your report. Then click the **Close** button to close this view.

Save Options Button

There are a lot of report options that you can set. After you have the options the way you prefer, you can save them so that you can quickly produce more reports with the same options later. When you click **Save Options**, the "Save As..." file dialog will appear. The default filename shown on this dialog will be the current

filename of the options file, if any. If you want to save your changes back in the same file, click OK. Otherwise, enter a new name for the options file.

Reload Button

Genbox makes it easy for you to experiment with different report options. When you close the Report Options View, your changes will be remembered throughout the current session. This means you can do other things, such as select a different current individual on the Individuals View, then select your same report options file from the menu again, and the changes you made will still be there. This makes it easy to try out your options with different individuals as keys.

Sometimes you will decide you want to get rid of all the changes you made, and restore the options to the way they were when you started. You can do this by clicking the **Reload** button: the report options will be reloaded from the file, so the settings will be restored to the way they were the last time the options were saved. This also happens whenever you exit Genbox and restart the program.

Defaults Button

Click the **Defaults** button to reset all of the settings to Genbox defaults for the current report type. The defaults are the same options as used by the **Basic** menu choice: it produces a plain-looking report. It provides a good starting point when you want to create a new options file from "scratch".

Close Button

The **Close** button closes the Report Options View. If you were using a report options file selected from the Report Options Menu, only the window is closed; the report options file will remain open, so that the next time you open that menu option, any changes you made during the current session will still be there.

If you had opened your report options file with the "Open Options file..." menu choice, both the document and window are closed when you click this button. If you have made changes to the report options file, you will be prompted to save your changes first.

If the media file is not found in the specified location, no other locations will be searched.

Ancestor Narrative Reports

Ancestor Narrative reports show the ancestors of the starting individual(s).

Pedigree Reports

Pedigree reports show the ancestors of the starting individuals.

Descendant Narrative Reports

Descendant Narrative reports show the descendants of the starting individuals.

Outline Descendant Reports

Outline Descendant reports show the descendants of the starting individuals.

Family Group Reports

Family Group reports present the data on individuals, their spouses, and children in a family format.

Individual Narrative Reports

Individual Narrative reports present the data of a single individual.

Calendar Reports

Calendar reports present data about individuals organized into a calendar format.

Custom Reports

Custom reports are customized reports that can contain lists of nearly any type of data from the database:

- Individuals
- Places
- Events
- Citations
- Sources
- Multimedia
- Researchers
- Correspondence Log
- Research Targets
- Projects
- Lists

Information can be presented in various formats:

- **Form:** the data is shown in individually labelled fields, several fields per row.
- **Single Column:** the data is shown in individually labelled fields, one field per row.
- **Table:** labels are shown in a header across the top, with data in columns below.
- **Envelope:** the unlabeled data for each key appears on a page, positioned as for an address on an envelope.
- **Labels:** the unlabeled data is grouped by key into a specified number of labels across and down the page.
- **Outline:** Custom reports for projects can be shown in an indented hierarchy. The size of the indent can be selected on the Format page.
- **Narrative:** Custom reports for projects can also be shown in narrative format, with numbered paragraphs.

You can save custom reports in Text format. Data in columns will be tab-delimited. You can then import this text file into spreadsheet programs, such as Microsoft Excel.

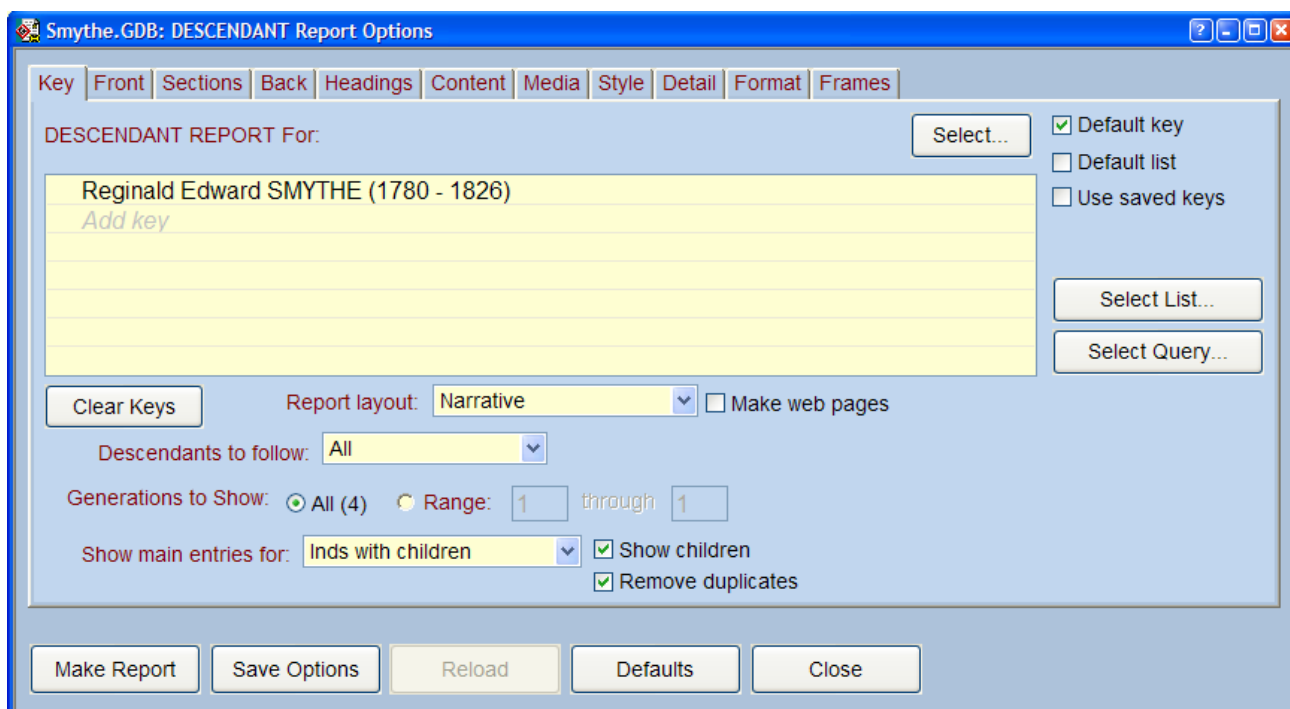
Report Options View: Key Page

Most reports are based on **key individuals**. The key individuals determine the **starting points** for the report. When there are several key individuals, each of them will be treated as the starting individual in turn, with the results merged into a single report.

Custom reports are based on keys that are either individuals, places, sources, multimedia, researchers, correspondence, research targets, projects, or lists. **Calendar** reports do not require any keys.

The keys are specified on the **Key page**. For most reports, a single key individual is used. When the [Report Options View](#) is first opened, the default key individual will be the current individual on the [Individuals View](#).

The Key page also includes a number of **layout controls**. The controls available will vary slightly depending on the report type selected.



[Key List](#)

[Select Button](#)

[Select List Button](#)

[Select Query Button](#)

[Clear Keys Button](#)

[Default Key Button](#)

[Default List Button](#)

[Use Saved Keys](#)

[Report Layout](#)

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Ancestor Narrative Report:

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[Starting Chart Number and Label](#)

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Descendant Narrative Report:
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Key List

The **Key** list displays the names of the keys, one on each row.

- **To add a key name**, click where it says "Add key", then type the name of the key.
- A pick dialog will open, displaying a list of the matching names. Select the intended name from the list.

Keys can also be added by clicking the [Select button](#).

Besides key names, **lists** and **queries** can also be specified for determination of the keys for the report. When a row contains the name of a list or query, an icon will precede the name, identifying its type:



List



Query


A list name is added with the [Select List button](#). All members of the list will be considered keys. Only lists with the same data type as the report can be selected.

When the current report is for individuals, the name of a saved query can also be specified. The query name is added with the [Select Query button](#). The resulting list of individuals when the query is run will be considered key individuals.

Select Button

Click the **Select** button to add keys using one of the pick dialogs. If the current report is for individuals, the [Individuals Pick Dialog](#) will open. Other pick dialogs will open when doing a custom report for places, sources, multimedia, research, projects, or lists.


Select List Button

Besides entering the names of keys, **lists** can also be specified for determination of the keys for a report. The **List icon**  identifies rows that contain the name of a list. All members of the list will be considered keys for the report.

To add a list name, click the **Select List** button. The [List View](#) will open, allowing you to select a list name. Click the name of a saved list, then click the **Select List Name** button. Or, click the **Select List Members** button to add the names of the members to the list box instead of the list name. The report will be the same either way, but each approach has its advantages:

- Click **Select List Name** if you plan to save your report options for future use. Then, the next time the report options are used, the **current** members of the named list will become keys.
- Click **Select List Members** if you want to selectively remove some names or reorder the names before making the report.

Select Query Button

Besides entering names and lists, **queries** can also be specified when the current report is for individuals. The **Query icon**  identifies rows that contain the name of a query. The resulting list of individuals when the query is run will be considered key individuals.

To add a query name, click the **Select Query** button. From the [Open File Dialog](#), select the name of a saved query definition. Query definition files have the extension .QRY.

- The query is not run until the **Make Report** button is pressed. If you save your report options for future use, any queries will run each time a report is produced, and the results at that time will be used as the key individuals.

Clear Keys Button

Click the **Clear Keys** button to remove all of the names from the list box.

Default Key Check Box

When this check box is checked, the Report Options View will automatically load the "default key". The default key will be the current individual in the Individuals View, or the current place in the Places View, current source in Sources View, etc. If a view of the required type is not open, the default key will be blank.

When editing a report options file, clicking and unclicking this option will load and unload the default key.

Default List Check Box

When this check box is checked, the Report Options View will automatically load the "default list". The default list will be the Individuals List, Places List, Sources List, etc., depending on the type of the current report options file.

When editing a report options file, clicking and unclicking this option will load and unload the default list.

Use Saved Keys Check Box

When the report options are saved to a report options file, the current keys are saved along with the options. When the report options file is reloaded, the saved keys can be reloaded as well by clicking the **Load Saved Keys** button. With this feature, you can save a favorite list of keys, including lists and queries, and select them again with just one click.

When editing a report options file, clicking and unclicking this option will load and unload the saved keys.

Report Layout

The choices on the drop-down list for **Report layout** vary with report type.

For **Ancestor Narrative**, **Descendant Narrative**, and **Individual Narrative** reports:

- **Narrative:** the data is composed into sentences and paragraphs.

For **Pedigree** reports:

- **Pedigree:** a standard ancestor pedigree layout is produced, using parent-child lines.

- **Fill-in Pedigree:** like the **Pedigree** layout, with the addition of blanks for missing data.
- **Condensed Pedigree:** similar to the **Pedigree** layout, but without lines or extra spacing.

For **Outline Descendant** reports:

- **Outline:** an indented outline is produced, using parent-child lines.

For **Family Group** reports:

- **Form:** the data is presented in a fixed arrangement.
- **Fill-in Form:** like **Form**, with the addition of blanks for missing data.
- **Condensed Form:**

For **Calendar** reports:

- **Wall Calendar:** a calendar is produced with a fixed size for each month.
- **Compressed calendar:** a calendar is produced with space varying according to content.

For **Custom** reports:

- **Form:** the data is shown in individually labelled fields, several fields per row.
- **Single Column:** the data is shown in individually labelled fields, one field per row.
- **Table:** labels are shown in a header across the top, with data in columns below.
- **Envelope:** the unlabeled data for each key appears on a page, positioned as for an address on an envelope.
- **Labels:** the unlabeled data is grouped by key into a specified number of labels across and down the page.
- **Outline:** Custom reports for projects can be shown in an indented hierarchy.
- **Narrative:** Custom reports for projects can also be shown in narrative format, with numbered paragraphs.

Make Web Pages

Click the **Make web pages** check box if you want to produce the report in HTML format. When the **Make Report** button is clicked, multiple web pages will be produced. You can specify the defaults for web page output on the [Preferences View](#), [Operation page](#).

Generations to Show

Most reports allow you specify the **Generations to show**, with an **All** choice and a **Range** choice. For the range, you can specify a starting generation number and an ending generation number.

This option is useful in limiting the report to just the portion that you are interested in.

Show Children

Click the **Show children** check box when you want to include children on the report.

Remove Duplicates

When determining the ancestors or descendants of a key individual, there may be more than one path that leads to the same individual. Click the **Remove duplicates** check box if you do not want to see the data repeated for such "doubly-related" individuals.

Ancestors to Include

On **Ancestor Narrative** reports, the **Ancestors to Include** box has the following choices on the drop-down list:

- All
- Male only
- Female only
- Direct lineage

This option allows you to control the types of ancestral lineage that will be followed.

Starting Chart Number and Label

On **Pedigree** reports, each chart page is numbered. The **Starting chart number** defaults to 1, but you can change it to any number you wish. This is useful when the pedigree charts being produced are the continuation of charts made previously. The **Label** box can be used to enter a text label that will print next to the chart number on the first chart page produced. This can explain the continuation, such as "(continued from chart 8)".

Generations Per Page

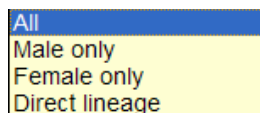
On **Pedigree** reports, either 4, 5, or 6 generations can be shown on each chart page. If you have a lot of data to show for each individual, you may wish to choose 4 generations per page. If you have a lot of generations, you may wish to choose 6 generations per page.

Overlap Generations

On **Pedigree** reports, click **Overlap generations** to produce a slightly different chart layout, making better use of available space. The first generations will be "sunk" into the higher generations, allowing more horizontal space for text on all generations.

Descendants to Follow

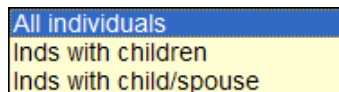
On **Descendant Narrative** reports, the **Descendants to Follow** box has the following choices on the drop-down list:



This option allows you to control the types of descendant lineage that will be followed.

Show Main Entries

On **Descendant Narrative** reports, a **main entry** is normally not shown for an individual, unless they have children of their own. The **show main entries** box has the following choices on its drop-down list:



Single Family / Cascade

Family Group reports are normally produced for just the key individuals. You can also automatically produce **Family Group** reports for all of each key individual's ancestors or descendants. This process of moving to an individual's parents, and then to their parents, is called **cascading**. Click **Cascade to ancestors** or **Cascade to descendants** to select this option.

Spouses

On **Family Group** reports, the **spouses** setting can be set to one of the following:

- **Omit** - no spouses will be shown on the report.
- **Preferred** - the spouse marked preferred (or the first spouse if no preferred spouse) will be shown in full on the report, with other spouses of the primary and preferred spouse shown on "Other Spouse" lines.
- **Current** - the spouse currently showing in the Individuals View will be shown in full on the report, with other spouses of the primary and current spouse shown on "Other Spouse" lines.
- **All** - a separate Family Group report will be generated for each spouse of the key individual showing the spouse data in full, with other spouses of the primary and preferred spouse shown on "Other Spouse" lines.

Number of Children

On **Family Group** reports with the **Report layout** set to **Fill-in Form**, the **Number of children** box specifies the minimum number of children blocks that will be included. This can be used to produce blank children blocks, ready for people to write in the additional information.

Single Individual / Cascade

Individual Narrative reports are normally produced for just the key individuals. You can also automatically produce **Individual Narrative** reports for all of each key individual's ancestors or descendants. This process of moving to an individual's parents, and then to their parents, is called **cascading**. Click **Cascade to ancestors** or **Cascade to descendants** to select this option.

No Row Wrap

On **custom** reports with the **Report layout** set to **Table**, a header section appears across the top of each page containing data labels, with the data appearing in columns underneath. If there are more data items selected for output than can fit across the page, both the header and the data rows beneath will normally be **wrapped**, which means they occupy more than one row.

This presentation can be difficult to read, particularly when wrapping continues onto three or more lines. Click the **No row wrap** check box to force the report rows to fit within the maximum page width. This will cause some text cells to increase the line wrap within their own column, and may cause some data values to be truncated.

Hide Empty Columns, Rows, or Cells

On **custom** reports with the **Report layout** set to **Table**, a header section appears across the top of each page containing data labels, with the data appearing in columns underneath. Click the **Hide empty columns** check box to cause columns that are blank for all keys to be omitted from the report.

On **custom** reports with the **Report Layout** set to **Single Column, Labels**, or **Envelopes**, click **Hide empty rows** to cause completely empty rows to be omitted from the report.

On **custom** reports with the **Report Layout** set to **Form**, click **Hide empty cells** to cause empty form boxes to be omitted.

Flatten Rows

On **custom** reports with the **Report layout** set to **Table**, data fields with multiple values will normally occupy a single cell in the table, with each value starting a new line. When the number of values is large, this decision can create a very tall row, affecting how many rows can be shown on a page. Often, large areas of white space will be left in an effort to keep the row together on a page.

The solution is to **flatten** the row by breaking up the fields with multiple values; only one value is shown in a row, and additional rows are created for the remaining values. To choose this layout, click the **Flatten rows** check box.

Maximum Rows

When **Maximum rows** is set to a value greater than zero on a custom report, this limits the number of table rows that will be shown on the report. This feature is useful when you are interested in seeing only the first few pages of the report.

Label Width and Height

On **custom** reports, the **Label width** and **Label height** boxes appear when the **Report layout** is set to **Labels**. Enter the physical dimensions of the labels.

Labels Across and Down

On **custom** reports, the **Labels across** and **Labels down** boxes appear when the **Report layout** is set to **Labels**. Enter the arrangement of labels on the label sheet.

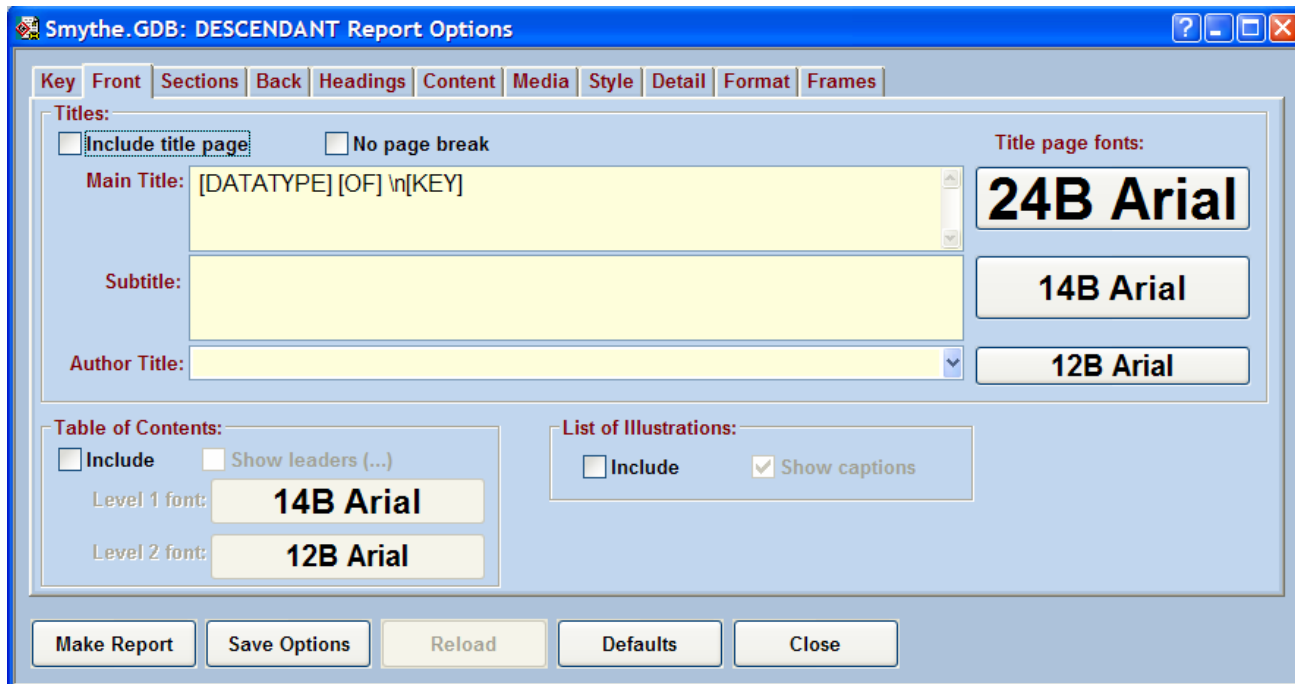
The combination of page size, page margins, **Label width**, **Label height**, **Labels across**, and **Labels down** completely determine the layout for labels. The labels will be spaced evenly within the page margins.

Return Address

On **custom** reports, the **Return address** box appears when the **Report layout** is set to **Envelopes**. Type the return address that you want to show on the envelopes into the box.

Report Options View: Front Page

Reports and books can have **title pages**. When they are lengthy, they often have a **table of contents**, and possibly a **list of illustrations**. These options can be specified on the **Front page**.



Include Check Boxes

There is an **Include** check box inside each of the three group boxes: **Titles**, **Table of Contents**, and **List of Illustrations**. The check box must be checked to include the corresponding element on the report.

Titles: No Page Break

To save space, the titles can be printed as the first half of the first page, rather than on a separate page. Click the **No page break** check box to enable this feature.

Title and Subtitle

The contents of the **Title** box are automatically generated from a template. You can edit the template or enter your own title information. The **Subtitle** box can be used for any text you want to include on the title page.

For easier translation into other languages, you can use a number of variables in titles and headings:

- **[DATATYPE]** - data type for current report: Ancestors, Descendants, Family, Calendar, Places, etc.
- **[REPTYPE]** - report name: Ancestors Report, Family Group Report, Places Report, etc.
- **[OF]** and **[FOR]** - common prepositions used in titles and headings.

A common title/heading template is **[DATATYPE] [OF] [KEY]**. This could be "Ancestors of John Doe" when filled.

Another common title/heading template is **[REPTYPE] [FOR] [KEY]**. This could be "Ancestors Report for John Doe".

When a resource file is available for the currently selected output language, these variables will be translated automatically.

Author

The **Author** box is initialized to the name of the current researcher. You can change this to the name of a different researcher.

Title Page Fonts

There are three **font buttons**, one each for the **Title**, **subtitle**, and **author**.

Table of Contents: Show Leaders

A **leader** is the line of dots that appears between the name of an entry and the page number. Click the **Show leaders** check box to include leaders in the table of contents.

Table of Contents Fonts

There are two **font buttons** for text in the table of contents: the **Level 1 font** will be used for main entries, and the **Level 2 font** will be used for subentries under the main entries.

List of Illustrations: Show Captions

Click the **Show captions** check box to include the captions of the pictures in the list of illustrations.

Report Options View: Sections Page

A report is divided into **sections**. Each section has a **heading** and **contents**. You can add, rename, and remove sections. Most report sections are named and generated automatically. You can include the contents of file as a section on the report. You can even include another Genbox report as a section.

The **Sections page** is used to view and specify the sections on the report. It contains a **list box**, which displays one row for each section in the report. When you look at the Sections page, it will show one row for every section that will be shown on the report with the current options. Before making the report, you can get an idea of how long it will be and what it will look like.

The sections will appear on the report in the order they appear in the list box. You can drag a row up or down to change its printing order. The list box has four columns. There are also two check boxes for controlling section page breaks:

Smythe.GDB: DESCENDANT Report Options

Key Front **Sections** Back Headings Content Media Style Detail Format Frames

Report Sections:

#	<input type="checkbox"/>	Heading or [TOC Only]	Filename or [Generated Contents]	<input type="checkbox"/>
	<input type="checkbox"/>	[Reginald Edward Smythe]	[Section for Reginald Edward Smythe]	<input type="checkbox"/>
1	<input type="checkbox"/>	First Generation	[Generation 1]	<input type="checkbox"/>
2	<input type="checkbox"/>	Second Generation	[Generation 2]	<input type="checkbox"/>
3	<input type="checkbox"/>	Third Generation	[Generation 3]	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Notes	[End Notes]	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Index	[Index]	<input type="checkbox"/>

☐ Start sections on odd pages ☐ New page for each generation

Make Report Save Options Reload Defaults Close

Section Number Column

Each section can have a **section number**. The section numbers can be used in page number formatting. Sections specified on the [Front page](#) and [Back page](#) (such as Table of Contents and End Notes) are usually not numbered.

Page Break Column

The **Page break** column contains a check box. When checked, the corresponding section will begin on a new page. If not checked, the section will begin on the same page as the end of the previous section.

Heading Column

Each section can have a **name**. Section names are printed at the start of each section, unless the names are surrounded with brackets. All section names will appear in the Table of Contents. Section names can be printed at the top of each page, if specified on the [Headings page](#).

You can change the names of sections on this page. You may wish to do this if the automatically generated name for a section isn't exactly what you want.

Note If the **Individual Headings** template on the [Headings page](#) is changed, all headings for individual sections will be updated to match the new template, wiping out any editing changes made to individual section headings on this page.

Contents Column

The **Contents** column identifies what will be shown in the corresponding section. The contents of most sections of the report will be automatically generated.

To include the contents of a file as a report section, click in the **Contents** column and type the name of a file. The **Open File Dialog** will open to help you browse for the file.

Exclude Section Column

The **exclude** checkbox can be checked if the corresponding section should be omitted from the report. This is a quick way to limit output of a large report to just the sections you are interested in viewing/printing.

Start Section on Odd Pages

When this is checked, each section of the report will start on an odd page. Blank pages will be inserted when necessary. Normally, sections would start on the next page, regardless of whether it was even or odd.

New Page for Each Generation

When this is checked, each generation will begin on a new page. This option is particularly useful when generating web pages.

Report Options View: Back Page

Reports can have the source citation notes collected into a single section at the back, titled **End Notes**. They can have a **Bibliography** which lists all of the sources cited. And they can have an **Index** which helps readers find information in the report by keyword. These sections can be specified on the **Back** page.

Smythe.GDB: DESCENDANT Report Options

Key | Front | Sections | **Back** | Headings | Content | Media | Style | Detail | Format | Frames

Notes:
☒ Endnotes ☐ Footnotes

Bibliography:
☒ Include

Index:
☒ Include

Columns: ☐ one ☐ two ☒ three

☐ Include letter headings
☐ Show birth-death years

Bold main headings:
 None

Main Headings:
☒ Surnames
☒ States/Countries
☒ Cities/Counties
☒ Local places

Font: 10 Times New Roman

Make Report Save Options Reload Defaults Close

Include Check Boxes

There is an **Include** check box inside each of the three group boxes: **Endnotes**, **Bibliography** and **Index**. The check box must be checked to include the corresponding section on the report. When checked, a row will be added to the Sections page to represent the section. By default, these sections will be placed after other sections, so that they appear last.

Note If **Endnotes** is not checked, **footnotes** will be produced for citations, and for general notes or research notes when the **In text** check box is not checked.

Index Main Headings

An index is the door to your report. When you publish your genealogical work, readers will often turn first to the index to see if it contains the names or places that interest them. You can choose the types of information that will be included in the index. The choices for the **Main headings** are:

- Surnames
- States/Countries (place names, levels 5 and 6)
- Cities/Counties (place names, levels 2, 3, 4)
- Local Places (place names, level 1)

The subheadings beneath **Surnames** will be all the individuals with that surname. Beneath the **State/Countries** and **Cities/Counties** main headings will be the places at lower levels. Beneath the **Local Places** main heading will be the higher place levels of the local site.

Bold Main Headings

Bolding some of the headings in an index can make it easier to find certain categories of entries. Choices from the drop-down list are:

None
All
Surnames
Places
Surnames and Places

Index Columns

Indexes can be produced with one, two or three **columns**. A two-column layout usually looks best.

Include Letter Headings

Click the **Include letter headings** check box to show large letters of the alphabet before each group of entries in the index.

Show Birth-Death Years

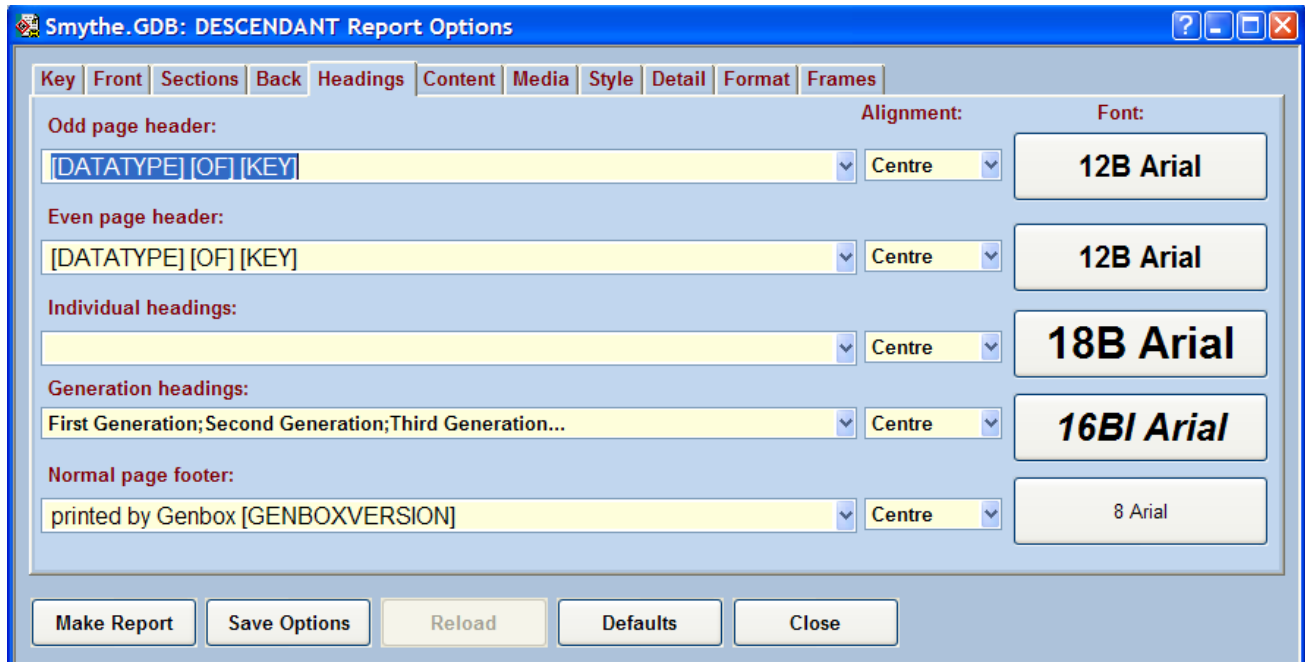
Click the **Show birth-death years** check box to include the birth and death years of individuals in the index. This can help distinguish between people who have the same names.

Index Font

The **Index Font** button is used to set the font for the index text. The font size for indexes is typically smaller than for the main body of the report.

Report Options View: Headings Page

The **headings** on a report identify the current section or generation. They can also identify the report or author. Headings are like road signs that tell the reader where he is and what he is reading. They can appear at the top or bottom of each page, and before the beginning of each section. Headings are specified on the **Headings page**.



The screenshot shows the 'Smythe.GDB: DESCENDANT Report Options' dialog box with the 'Headings' tab selected. The dialog has a menu bar with options: Key, Front, Sections, Back, Headings, Content, Media, Style, Detail, Format, and Frames. The main area contains settings for various headings, each with a text input field, an alignment dropdown, and a font selection button.

Heading Type	Text Template	Alignment	Font
Odd page header:	[DATATYPE] [OF] [KEY]	Centre	12B Arial
Even page header:	[DATATYPE] [OF] [KEY]	Centre	12B Arial
Individual headings:		Centre	18B Arial
Generation headings:	First Generation;Second Generation;Third Generation...	Centre	16B Arial
Normal page footer:	printed by Genbox [GENBOXVERSION]	Centre	8 Arial

At the bottom of the dialog are five buttons: Make Report, Save Options, Reload, Defaults, and Close.

Report Title/Heading Template Variables

All of the headings except for [Generation headings](#) and [Day Name Headings](#) are specified by using a **template**. You can define the templates yourself. Each heading box also has a number of predefined templates available on the drop-down list. The template variables are all uppercase and surrounded by brackets. The following template variables may be specified:

ADDRESS	Address of current researcher, formatted as one line
AUTHORTITLE	Report Author title , as specified on the Front page .
KEY	Current key individual.
KEYNUM	Number of current key individual.
MONTH	Name of current month on report (Calendar reports).
RESEARCHER	Name of current researcher.
SECTION	Section title.
SUBTITLE	Report Subtitle , as specified on the Front page .
TITLE	Report Main title , as specified on the Front page .
TYPE	Report type.
YEAR	Current year on report (Calendar reports).
DATATYPE	Data type for current report: Ancestors, Descendants, Family, Calendar, Places, etc.
REPTYPE	Report name: Ancestors Report, Family Group Report, Places Report, etc.
OF	A common preposition. Will be translated to the output language when a matching resource file is available.
FOR	A common preposition. Will be translated to the output language when a matching resource file is available.

Odd and Even Page Headers

Page headings for odd-numbered pages and even-numbered pages can be set independently. The headings are each set with a [template](#). You can define the templates yourself. A number of predefined templates are available on the drop-down list:

(omit)
[TITLE]
[SUBTITLE]
[SECTION]
[RESEARCHER]
[RESEARCHER] [ADDRESS]
Prepared by [RESEARCHER] [ADDRESS]

Individual Headings

Individual headings appear as the section name for each individual section on the report. The heading is set with a [template](#). You can define the template yourself. A number of predefined templates are available on the drop-down list, which vary according to the general report type:

- (omit)
- [KEY]
- PART [KEYNUM]: [KEY]
- Ancestors of [KEY]
- Descendants of [KEY]
- Pedigree of [KEY]
- Family of [KEY]
- [KEY] Family

Changes made to the **Individual headings** template will immediately update the section headings for individual sections, which you can see on the [Sections page](#). This is done immediately so that you can see what the names for all the sections will look like before the report is printed. All variables will be filled with their current values. If you make changes to any variables used in the **Individual headings** template, you will need to reselect or edit the template again to update the headings on the Sections page.

Generation Headings

Generation headings appear before each generation. Choices on the drop-down list are:

(omit)
(specified on sections page)
First Generation; Second Generation; Third Generation...
Generation 1; Generation 2; Generation 3...
Generation No. 1; Generation No. 2; Generation No. 3...
Children;Grandchildren;Great-Grandchildren;...
Second Generation (Children);Third Generation (Grandchildren);...

Month Name Headings (Calendar Report)

For Calendar reports, the format for the **Month name** that appears at the top of each page is set with a [template](#). The predefined templates available on the drop-down list are:

(omit)
[MONTH]
[MONTH] [YEAR]

Day Name Headings (Calendar Report)

The format for the **Day names** can be selected from the drop-down list:

(omit)
Monday;Tuesday;Wednesday;Thursday;Friday;Saturday;Sunday;
MONDAY;TUESDAY;WEDNESDAY;THURSDAY;FRIDAY;SATURDAY;SUNDAY;
Mon;Tue;Wed;Thu;Fri;Sat;Sun;
MON;TUE;WED;THU;FRI;SAT;SUN;
M;T;W;T;F;S;S;

Page Footers

Page footers can appear at the bottom of each page. The footer is set with a **template**. You can define the template yourself. The predefined templates available on the drop-down list are the same as for the [page headers](#).

Alignment

There are five **Alignment** boxes. Each heading can have its own horizontal alignment setting. Choices from the drop-down lists include:

Center
Left
Right
Inside
Outside

The **Inside** alignment will align the heading to the side of the page closest to the binding: the left side for odd-numbered pages, and the right side for even-numbered pages. The **Outside** alignment will align the heading to the side of the page closest to the open edge: the right side for odd-numbered pages, and the left side for even-numbered pages.

For [Day Name Headings](#) on Calendar reports, **Inside** will print the day names inside the top of the first week of day boxes, while **Outside** will print the day names just above the first week of day boxes.

Font Buttons

There are five **Font** buttons. Each heading can have its own font. Clicking on a **Font** button will open the [Select Font Dialog](#).

Report Options View: Content Page

After choosing the key individuals you want to include on your report, you need to decide what content you want to show for each individual. The **Content page** is for this purpose. This section describes the Content page for most reports. For Calendar reports, see [Content Page \(Calendar Reports\)](#). For custom reports, see [Content Page \(Custom Reports\)](#).

On genealogy reports, the content for individuals usually varies, according to the type of individual and where the individual appears on the report. A given individual may also appear multiple times on the same report, with varying content according to placement. You can vary the content on individual reports for several groups of individuals.

The screenshot shows the 'Smythe.GDB: DESCENDANT Report Options' dialog box with the 'Content' tab selected. The 'Content For:' section has radio buttons for 'ALL', 'Primary' (selected), 'Preferred Spouse', 'Other Spouses', 'Child (Carried Fwd)', and 'Child (Not Carried Fwd)'. Below this are dropdown menus for 'Identifiers' (Preferred), 'Attributes' (Omit), 'Events' (All types), 'Contacts' (Omit), and 'Parents' (Names). To the right are 'General notes' (All types) and 'Research notes' (Omit), both with 'In text' checkboxes. Further right are 'Event parts' (All parts) and 'Contact detail' (Full). At the bottom of this section are checkboxes for 'Disproved relations' and 'Alt events' (checked), and buttons for 'All' and 'None'. Below the main section are checkboxes for 'Override privacy flags/marks' and 'Override exclude flags', a 'Living' dropdown (Normal content), and an 'Author note' dropdown (Omit). A 'Reset' button is at the bottom right. At the very bottom of the dialog are buttons for 'Make Report', 'Save Options', 'Reload', 'Defaults', and 'Close'.

The Content page is divided into **three** parts:

- The **top** part of the page is for selecting a group of individuals: ALL, Primary, Preferred Spouse, Other Spouses, Child (has main entry), Child (no main entry); on Pedigree reports, the group choices are for each generation
- The **middle** part of the page is for setting the content choices for that group.
- The **bottom** part of the page is for content choices that affect the whole report.

ALL Content

The **ALL** choice allows you to affect all groups at once, which can save you time. When **ALL** is chosen, only the content choices that all individual groups have **in common** will be shown; other content choices will blank. Any changes made when **All** is selected will change the settings for all groups.

Primary Content

The **Primary** group is generally the key individuals and their direct lines. Most information on reports is for individuals in the Primary group.

Preferred Spouse Content

The **Preferred spouse** is the spouse of a primary individual with the **Preferred** check box checked for the family, which can be viewed on the [Individuals View](#), [Family page](#). The preferred spouse is usually the spouse that had the children in the line of interest.

Other Spouses Content

Other spouses are spouses of primary individuals that are not marked as **Preferred**. Usually, the content for **Other spouses** is less than for the [Preferred spouse](#), and sometimes all information is omitted.

Child (has main entry) Content

On genealogy reports, a child introduced in the parent's main entry may appear elsewhere in the report in its own main entry. For descendant reports, a child that also **has its own main entry** would be called a **child carried forward**. For ancestor reports, the main entry for the child actually appears earlier in the report.

To avoid unnecessary duplication, the content for a **Child (has main entry)** paragraph is usually reduced, and the full content is shown when the individual appears in its main entry.

Child (no main entry) Content

On genealogy reports, a child that does not have a main entry of its own and is mentioned only in a child paragraph of the parent's main entry is called a **child not carried forward**. Typically, a child that did not marry and/or had no children is not given a main entry of its own. Also, a report that is limited in the number of generations will show terminal children in the final generation. Compared to [Child \(has main entry\) Content](#), the content for **Child (no main entry) Content** is usually increased, since this is the only time the child will be mentioned in the report.

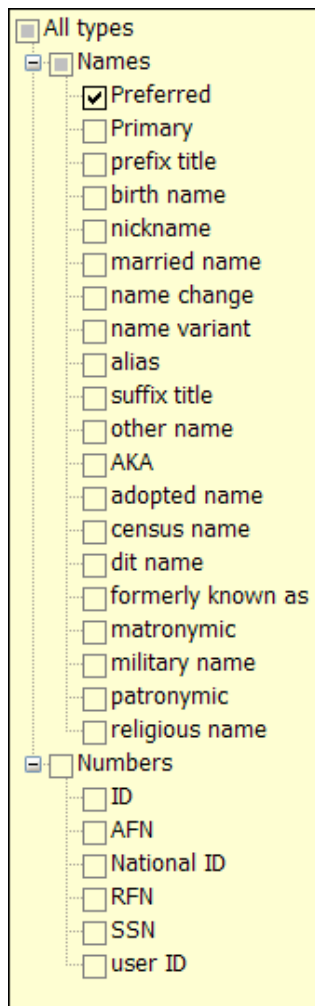
Pedigree Generation Content

On Pedigree reports, individuals are grouped by generation. Content for each generation (1-4, 1-5, or 1-6, depending on [Generations per Page](#) setting on the [Key Page](#)) can be set.

Often, you will want to **reduce** content for the higher generations, where space is more limited.

Identifiers

The **Identifiers** box controls the inclusion of individual names and other identifiers, according to identifier type. All non-hidden identifier types appear on the drop-down check list, arranged in a hierarchy. For example:



The screenshot shows a hierarchical selection interface for identifiers. It is contained within a yellow rectangular box. At the top is a checkbox labeled "All types". Below it is a collapsed section icon followed by the label "Names". Under "Names", there is a list of identifier types, each with a checkbox. The "Preferred" checkbox is checked. Below "Names" is another collapsed section icon followed by the label "Numbers". Under "Numbers", there is a list of identifier types, each with a checkbox.

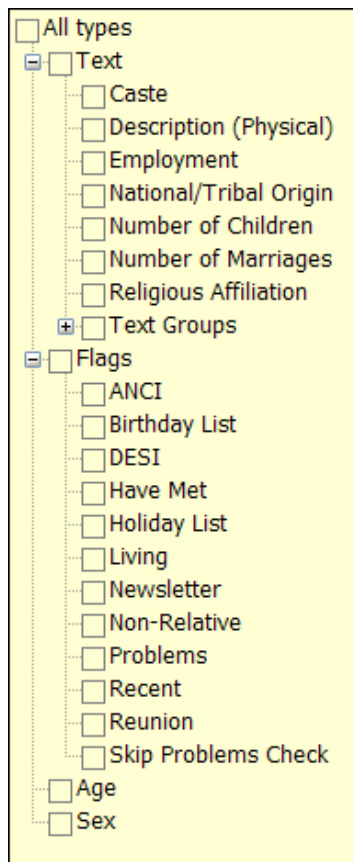
- ☐ All types
 - ☒ Names
 - ☒ Preferred
 - ☐ Primary
 - ☐ prefix title
 - ☐ birth name
 - ☐ nickname
 - ☐ married name
 - ☐ name change
 - ☐ name variant
 - ☐ alias
 - ☐ suffix title
 - ☐ other name
 - ☐ AKA
 - ☐ adopted name
 - ☐ census name
 - ☐ dit name
 - ☐ formerly known as
 - ☐ matronymic
 - ☐ military name
 - ☐ patronymic
 - ☐ religious name
 - ☐ Numbers
 - ☐ ID
 - ☐ AFN
 - ☐ National ID
 - ☐ RFN
 - ☐ SSN
 - ☐ user ID

Multiple items can be checked.

The default is **Preferred**. Selected names and identifiers not shown as part of the initial name will be included later in the body of the report.

Attributes

The **Attributes** box controls the inclusion of text attributes, individual flags, age, and sex. All non-hidden text attributes appear on the drop-down check list, arranged in a hierarchy. For example:



- ☐ All types
 - ☒ Text
 - ☐ Caste
 - ☐ Description (Physical)
 - ☐ Employment
 - ☐ National/Tribal Origin
 - ☐ Number of Children
 - ☐ Number of Marriages
 - ☐ Religious Affiliation
 - ☒ Text Groups
 - ☒ Flags
 - ☐ ANCI
 - ☐ Birthday List
 - ☐ DESI
 - ☐ Have Met
 - ☐ Holiday List
 - ☐ Living
 - ☐ Newsletter
 - ☐ Non-Relative
 - ☐ Problems
 - ☐ Recent
 - ☐ Reunion
 - ☐ Skip Problems Check
 - ☐ Age
 - ☐ Sex

Multiple items can be checked.

The **Text group** choices refer to the A, B, C, D grouping of event types, as specified on the [Event Types View](#), which is where text attributes are defined.

Note: the text groups A-D define their own set of event types, which **add** to the other checks indicated on the dropdown list. If you include a text group, you may have attributes in the output that you were not expecting. An attribute for an event type that is marked (on the Event Types View) as part of a group (A-D) will appear in the output whenever the group is checked, even when the separate check for the attribute itself is not checked.

The default Attribute content setting is **Omit**.

Events

The **Events** box controls the inclusion of events, according to event type. All non-hidden event types appear on the drop-down check list, arranged in a hierarchy. For example:

Multiple items can be checked.

Choose **principal** to show all events, except for witnessed events and secondary events. **Secondary** events are the reverse directional events, such as childbirth (reverse of birth), and child adopted (reverse of adoption).

The **Group** choices refer to the A, B, C, D grouping of event types, as specified on the [Event Types View](#). **Date range** will show just the birth and death dates separated by a dash. **Year range** is similar, except only the years of the birth and death dates are shown.

Note: the text groups A-D define their own set of event types, which **add** to the other checks indicated on the dropdown list. If you include a text group, you may have event types in the output that you were not expecting. An event type that is marked (on the Event Types View) as part of a group (A-D) will appear in the output whenever the group is checked, even when the separate check for the event type itself is not checked.

Adding/removing an event type to a group on the Event Types view will affect charts that have a group flag selected for content. Using a saved chart options file with a different database will also affect which event types are included in each of the group flags.

Contacts

The **Contacts** box controls inclusion of individual contact information. Choices appear on the drop-down check list:

Multiple items can be checked.

The actual contents for each contact record are specified with the [Contact Detail](#) box.

Parents

The **Parents** box controls inclusion of parent information, on reports where a reference can be made to parents of an individual. The choices available are:

Omit
Names
Names, years
Names, dates

General Notes and Research Notes

The **General notes** and **Research notes** boxes controls the inclusion of general and research notes. The following choices appear on the drop-down check lists:

<input checked="" type="checkbox"/> All types
<input checked="" type="checkbox"/> Individual
<input checked="" type="checkbox"/> Identifier
<input checked="" type="checkbox"/> Event
<input checked="" type="checkbox"/> Family
<input checked="" type="checkbox"/> Parent
<input type="checkbox"/> Marked Only

Multiple items can be checked.

The default is **Omit**. **Marked only** can be used as a filter of the other note types selected.

Next to each of these drop-down check list boxes is a check box named **In text**. When checked, the corresponding note types will be shown in the body of the report. If not checked, the corresponding note types will appear in the footnotes or endnotes. The default is to show notes in the body of the report.

Event Parts

The **Event Parts** box controls the types of data shown for each event. The following choices appear on the drop-down check list for reports:

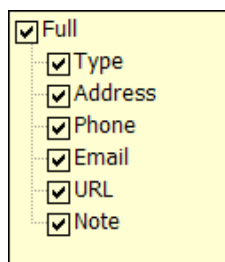
<input checked="" type="checkbox"/> All parts
<input checked="" type="checkbox"/> Date
<input checked="" type="checkbox"/> Day
<input checked="" type="checkbox"/> Month
<input checked="" type="checkbox"/> Year
<input checked="" type="checkbox"/> Local Site
<input checked="" type="checkbox"/> Place
<input checked="" type="checkbox"/> Detail

Multiple items can be checked.

Note: Local Site and Place are filtered by selections on the **Report Options Detail** page.

Contact Detail

The **Contact Detail** box controls the types of data shown for each contact record. The following choices appear on the drop-down check list:



Multiple items can be checked.

This box is disabled when the [Contacts box](#) is set to **Omit**.

Disproved Relations Check Box

Parents records on the [Individuals View](#), [Parents page](#) have a check box named **Disproved**. This identifies individuals that are known NOT be parents of the current individual. The **Disproved relations** check box can be checked to include these relationships on the report. Normally, disproved relationships are omitted.

Alternate Events Check Box

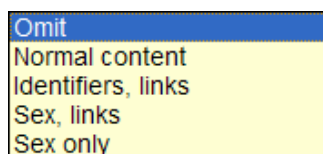
Check the **Alternate events** check box to include alternate events on the report. The default is omit alternate events.

All, None, and Reset Buttons

Click the **All** button to "turn everything on" for the current individual group. Click the **None** button to "turn everything off" for the current individual group. These settings are useful as a preliminary shortcut when the desired content is close to one of these extremes. Click the **Reset** button to reset settings for all individual groups to their default values.

Living Individuals

By default, living individuals are shown with the normal content (as specified on the Contents page). If you plan to distribute a report outside of your own family, you may wish to restrict the content shown for living individuals, to respect their privacy. The **Living individuals** box presents the following choices on its drop-down list:



When **Omit** is selected, living individuals and all links to them are treated like they are not even in your database. This means lineages will be ended when they reach a living individual. On a **Descendants** report, for example, if a deceased individual has five children, of which two are still living, the report will show the individual as having only **three** children. And no further descendants will be shown for the living children, even if they are deceased.

When **Identifiers, links** is selected, the names and relationships of living individuals are included, but no other information. No events, dates, or places. "Names" will include all the identifiers normally selected for output.

When **Sex, links** is selected, the name will be replaced by "Male" or "Female", so that only the sex and relationships of living individuals are shown. This provides a level of privacy higher than **Identifiers, links**, because names are not shown.

The **Sex only** choice will show only "Male" or "Female", with no information on further descendants.

Override Privacy Flags/Marks Check Box

When **Override privacy flags/marks** is checked, parent relationships and spouse relationships that have the **Private** flag checked will be shown with their true relationships on the chart. Normally, private parent relationships are shown as "biological" and private spouse relationships are shown as "married" on charts and reports.

Override Exclude Flags Check Box

When **Override exclude flags** is checked, parent links, spouse links, and events that have the **Exclude** flag checked will also be included on the report.

Author Note

The note text in the record for the current researcher can be included on the report. The **Author note** box offers the following choices for placement:

Omit
Before Body
In Footnote
After Body

Report Options View: Content Page (Calendar Reports)

Calendar reports produce calendars that can include birthdays and anniversaries for selected individuals. The report can include all months or a single month for a specified year. The content for the report is specified on the **Content** page.

Year

Enter the year for the calendar in the **Year** box.

Month

Select either **All** or a specific month for the calendar from the **Month** box:

Weeks Per Month

The **Weeks per month** box offers the following choices:

In **Five** week format, day boxes at the end of months with six weeks will be shared. In **Five, wrap to top** format, months with six weeks will have the extra one or two days appearing in blank spaces of the first week. This allows a full box to show their content.

Starting Day of Week

The **Starting day of week** box allows you to specify which day of the week will be shown first. The default is **Sunday**:

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Birthdays

When **Birthdays** is checked, the names of the key individuals will appear in the day boxes that correspond to the anniversary of their birth date. There are three format choices for the data:

- Show name only
- Show year of birth
- Show age if under: (value)

Anniversaries

When **Anniversaries** is checked, the names of the key individuals will appear in the day boxes that correspond to the anniversary of their marriage date. There are two format choices for the data:

- Show name only
- Show year of anniversary

Override Privacy Flags/Marks

Normally, families that are marked as partners but have the privacy flag set will be treated as spouses, and their anniversary date will be shown on the chart. When **Override privacy flags/marks** is checked, the privacy flag will be ignored, and any families marked as partners will have their anniversary date omitted from the report.

Override Exclude Flags

Normally, events that have the **Exclude** flag checked will not be used to show birth dates or anniversary dates. When **Override exclude flags** is checked, these data records will be used.

Include Alternate Events

Normally, events that have the **Alternate** flag checked will not be used to show birth dates or anniversary dates. When **Include alternate events** is checked, these data records will be used. This can result in a birth date or anniversary date for an individual being shown on multiple dates.

Reset Button

Click the **Reset** button to set all content settings back to their default values.

Report Options View: Content Page (Custom Reports)

Custom reports can show a wide variety of data for each of the different key types. The data choices are organized into categories. On the **Content page** for custom reports, there are two list boxes: the box on the left shows available fields, while the box on the right shows selected fields.

1. **To select data for output**, first choose a category from the Category box. The available data fields in that category will appear in the Available fields list box.
2. Select fields you want to include on the report. You can double-click on them, or single-click and then press the > button.

Category Box

The categories available in the **Category** box vary, depending on the choice of custom report type:

Custom Report Type	Categories
Individuals	All, General, Identifiers, Attributes, Flags, Parent Family, Families, Events, Contacts, Individual Media, Family Media, Event Media, Special
Places	All, Places, Place Names, Media, Links
Events	All, Events, Witnesses, Media
Citations	All, Citations, Sources, Events
Sources	All, Sources, Content, Media, Links
Media	All, Media, Flags
Researchers	All, Researchers, Media, Contact
Correspondence Log	All, Correspondence, Contact
Research Targets	All, Research Targets, Searches
Projects	All, Projects, Correspondence, Research Targets, Searches
Lists	All, Lists, Members

Next to the **Category** box are **Left** and **Right Arrow** buttons. You can use these buttons to step through the categories.

Available Fields List

The **Available Fields** list will display the names of the data items in the selected category. The **All** category will show all of the data fields available.

Selected Fields List

The **Selected Fields** list shows the names of the currently selected data fields (the **destination** list).

Arrow Movement Buttons

There are four **Arrow Movement** buttons. They can be used to move data field names into and out of the **Selected fields** list.

- > Add the selected names on the **Available fields** list to the **Selected fields** list. Shortcut: RIGHT ARROW.
- < Remove the selected names from the **Selected fields** list. Shortcut: LEFT ARROW.

Note Even though it is helpful to think of the data fields "moving" from the list on the left to the list on the right, field names are not actually removed from the **Selected fields** list.

Line Break Button

- To add a line break to the report after a particular column, click the **Line Break** button. It will be represented on the Selected Fields list as a dashed line.

Using this feature, you can further tailor the appearance of a custom report.

Multiple Subrecords Controls

When the current category is for a data type that can contain multiple subrecords for each main record, there are additional choices for what to include on the report. The **Multiples** controls will be enabled to allow you to choose whether **all** of the subrecords should be shown or just **one**, and whether only subrecords of a particular **type** should be included.

- Click the **One** radio button if you wish to include only one value on the report. When selected, the text "(1)" will appear after the label name in the Selected Fields list box to indicate this.
- Some subrecords provide a pick list of **types**. The dropdown pick list supports multiple checked items, so you can choose just the types that you want for the report. Or, click the top entry for "All types".

For example, on an Individuals Report, you could choose to include just Birth and Death event information, rather than information for all event types.

Using the Filter Box

Normally, custom reports will contain output for every key selected on the Key Page, and for every subrecord of each main record. Sometimes, you will only be interested in outputting some of the subrecords, or in outputting a subset of the main records. To limit the output of a custom report, you can filter according to values in data fields.

- To use the filter box**, enter the match pattern into the filter box before moving the data field to the selected list. Only records that have a value that matches the match pattern will appear in the output. The filter text will be shown after the field name on the destination side, surrounded in either square brackets (when filtering the main record) or curly braces (when filtering subrecords only).
- The **asterisk wildcard (*)** can be used to mean "match any number of characters in this position".
- The **question mark wildcard (?)** can be used to match a single character at that position.
- If your filter text is for only a portion of the data value**, use the asterisk wildcard (*) before and after your text.
- To limit the report only to data records that are **non-blank** in a particular field, enter just an asterisk (*).
- To limit the report only to data records that are **blank** in a particular field, enter "!"

Hint: make your filter field one of the first fields in the output list for faster report generation.

Filtering the Main Record

You can filter according to data values in the main record or in the subrecords. When filtering according to data values in the main record (the first category), the filter must match in order for the main record to be part of the report.

When filtering data values in subrecords, you have a choice as to how to perform the filter:

- To filter just the subrecords, clear the **Filter main record** check box. All main records will be included, regardless of whether there is a subrecord that matches the filter. Only the subrecords that match the filter will be included.
- To filter the main record, check **Filter main record**. When there is no subrecord that matches the filter, output for the entire main record will be omitted. When there is a matching subrecord, the main record along with the matching subrecords will be included in the output.

When **Filter main record** is checked, the filter text will be **required** to match at least one subrecord in order for the main record to be output.

When a filter fails on a subrecord, any additional data fields selected for output from the same subrecord will be omitted, but data fields from that subrecord that appear **before** the filtering field will still be output. For this reason, it is a good practice to put the fields that have filter values first in the output field order.


Filtering for Missing Subrecords

Sometimes it is desirable to know which main records have no subrecords of a particular type. For example, you might want to produce a report of individuals that have no death event subrecords. Normally, a filter will fail when the filter text cannot be matched: this means missing subrecords will cause the match to fail.

As a special convention, the filter "!", which can be read "not something", can be used on the ID fields of subrecords to indicate that only main records that are missing subrecords of that type should be returned. Because every valid subrecord will have a non-zero ID field value, only main records missing all subrecords of the specified type will pass the filter.

Setting Report Field Properties

The labels and case for each field selected for output can be specified.

1. **To set properties for a field**, first click it to make it the current selection.
2. Right-click to bring up the popup menu, and then click **Field Properties**. Or, click the **Field Properties**  button. The [Report Field Properties Dialog](#) will open.

Ordering Selected Fields

- **To order the selected fields**, drag them to the desired position in the list.

Clear Button

This button removes all of the names, in all categories, from the **Selected fields** list.

Default Button

This button restores the selected fields to their default values.

Report Options View: Sort Page (Custom Reports)

For your custom report, after you have selected the data fields for output on the [Content Page](#), you can specify the **sort order** for the data on the **Sort page**.

The screenshot shows a software window titled "Smythe.GDB: INDIVIDUALS Report Options". It has a tabbed interface with tabs: Key, Front, Sections, Back, Headings, Content, Sort (selected), Media, Detail, Format, and Frames. The "Sort" tab contains two lists: "Available fields:" and "Selected fields:". The "Available fields:" list contains "ID" and "Name". The "Selected fields:" list is empty. Between the lists are three arrow buttons: ">", "<", and "<<". Below these buttons are two radio buttons: "Ascending" (selected) and "Descending". At the bottom of the dialog are five buttons: "Make Report", "Save Options", "Reload", "Defaults", and "Close".

Available Fields

The **Available fields** list displays the names of the data fields selected for output on the [Content Page](#). You can sort on one or more of the fields selected for output. Fields that have been marked "Exclude" are still available for sort purposes.

Selected Fields

The **Selected fields** list displays the data fields that will control the sorting on the report. The first data field listed will be the **primary** sort field. The second data field listed will be the **secondary** sort field. When two output records have the same value in the primary sort field, the records will be sorted according to the values in the secondary sort field. There can be more than two sort data fields as well.

- A **down arrow** appearing before the data field name indicates **descending** order.
- An **up arrow** appearing before the data field name indicates **ascending** order.
- Clicking a sort field name will **reverse** the direction of the arrow.

Arrow Movement Buttons

There are three **arrow** buttons that can be used to move data fields between the left and right list boxes.

- Click the **> arrow** button to move the selected field on the **Available fields** list to the **Selected fields** list.
- Click the **< arrow** button to move the selected field on the **Selected fields** list to the **Available fields** list.
- Click the **<< arrow** button to move **all** the fields on the **Selected fields** list back to the **Available fields** list.

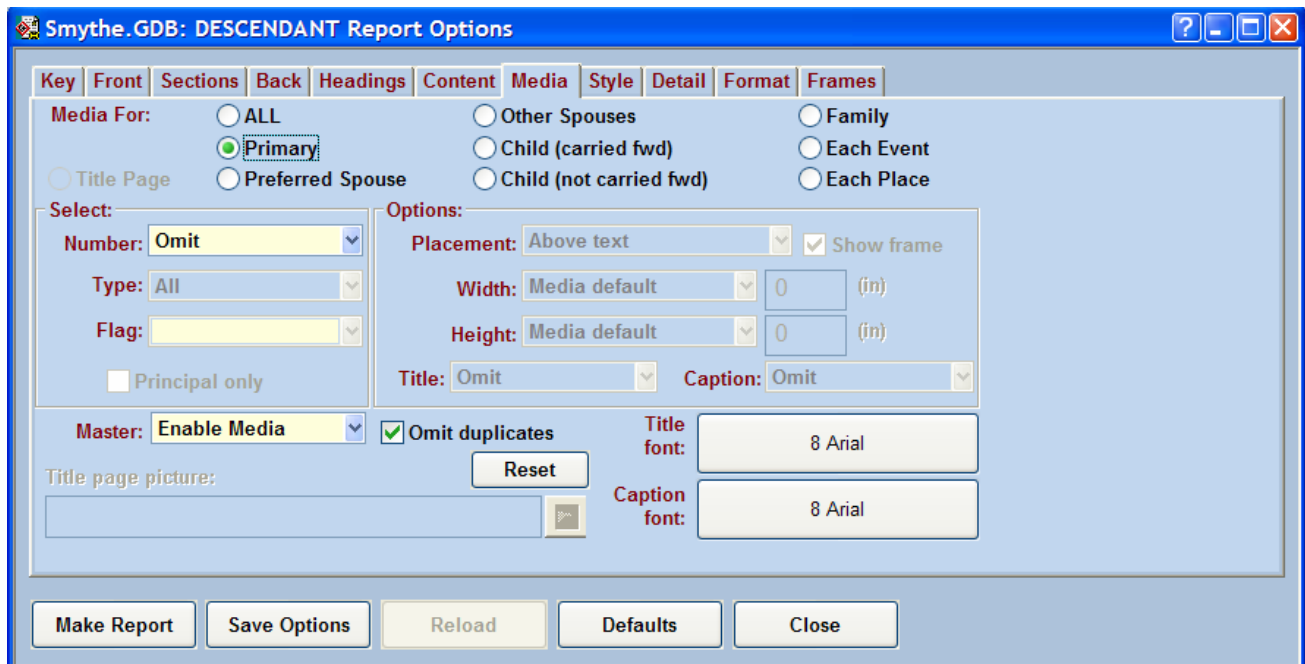
Ascending or Descending

The **Ascending** and **Descending** radio buttons select the default sort direction for data fields being moved to the **Selected fields** list.

Report Options View: Media Page

Adding pictures to a report can make it much more interesting. Being able to see images of your ancestors next to their discussions makes the story come to life. You can select the multimedia content you want to appear on your report with the **Media page**. For calendar reports, see [Media Page \(Calendar Reports\)](#).

Multimedia can be linked to Individuals, Families, Events, Places, Sources. On genealogy reports, Individuals can be further divided into Primary, Preferred Spouse, Other Spouses, Child Carried Forward, and Child Not Carried Forward. On the Media page, you can specify the multimedia you want to include for each of these groups.



The screenshot shows the 'Smythe.GDB: DESCENDANT Report Options' dialog box with the 'Media' tab selected. The 'Media For:' section has radio buttons for 'ALL', 'Primary' (selected), 'Other Spouses', 'Child (carried fwd)', 'Family', 'Each Event', 'Preferred Spouse', 'Child (not carried fwd)', and 'Each Place'. The 'Select:' section includes a 'Number' dropdown set to 'Omit', a 'Type' dropdown set to 'All', and a 'Flag' dropdown. There is a 'Principal only' checkbox. The 'Options:' section includes a 'Placement' dropdown set to 'Above text', a 'Show frame' checkbox, 'Width' and 'Height' dropdowns both set to 'Media default', and 'Title' and 'Caption' dropdowns both set to 'Omit'. The 'Master:' dropdown is set to 'Enable Media'. There is a 'Reset' button and a 'Title page picture:' field. The 'Title font:' and 'Caption font:' are both set to '8 Arial'. At the bottom are buttons for 'Make Report', 'Save Options', 'Reload', 'Defaults', and 'Close'.

The Media page is divided into **three** parts:

- The **top** part of the page is for selecting a group for multimedia choices: ALL, Primary, Preferred Spouse, Other Spouses, Child (carried forward), Child (not carried forward), Family, Event, Place. For custom reports: choices are ALL, Key, and Media Field.
- The **middle** part of the page is for setting the multimedia content choices for that group.
- The **bottom** part of the page is for multimedia choices that affect the whole report.

ALL Content

The **ALL** choice allows you to affect all groups at once, which can save you time. When **ALL** is chosen, only the multimedia choices that all groups have **in common** will be shown; other choices will be shown blank. Any changes made when **All** is selected will change the settings for all groups.

Primary Content

The **Primary** group is generally the key individuals and their direct lines. Often, multimedia on reports is selected for individuals in the Primary group.

Preferred Spouse Content

The **Preferred spouse** is the spouse of a primary individual with the **Preferred** check box checked for the family, which can be viewed on the [Individuals View](#), [Family page](#). The preferred spouse is usually the spouse that had the children in the line of interest.

Other Spouses Content

Other spouses are spouses of primary individuals that are not marked as **Preferred**. Usually, the content for **Other spouses** is less than for the [Preferred spouse](#), and sometimes all information is omitted.

Child Carried Forward Content

On genealogy reports, a **Child carried forward** is a child that appears later on the report as a primary individual. To avoid unnecessary duplication, the content for a **Child carried forward** is usually reduced, and the full content is shown when the individual appears as the primary. For multimedia, that means pictures are usually omitted from this group.

Child Not Carried Forward Content

On genealogy reports, a **Child not carried forward** is a child that does not appear later on the report as a primary individual. This is usually because the child did not marry, or had no children. Compared to [Child carried forward](#), the content is usually increased for **Child not carried forward**.

Family Content

Families appearing on a report can have associated media included.

Event Content

Events appearing on a report can have associated media included.

Place Content

Places appearing on a report can have associated media included.

Key Content

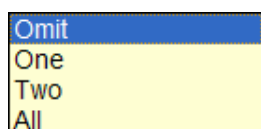
For custom reports, media selected for keys will appear above or below the tabular data. This means that it won't be placed in a column by itself; rather, it will appear between the data rows. This is a content selection independent of content selected on the Content page.

Media Field Content

For custom reports, this group will control settings for the "Media" field, if one has already been selected on the Content Page. You can specify whether multiple pictures should appear, and how large. These media items will appear only in the columns where they have been selected. If multiple pictures are allowed, they will be shown in additional rows on the report.

Number

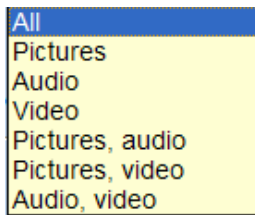
The **Number** box allows you to limit the number of multimedia objects to show for data items in the current group:



When **Omit** is selected, all other multimedia controls for the current group will be disabled.

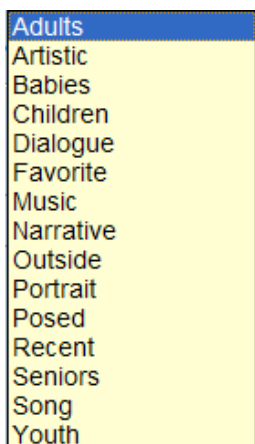
Type

The **Type** box allows you to control the type of media objects that will be included. Usually, only **images** are included. Choices are:



Flag

The **Flag** box allows you to limit the multimedia that will be included to only those media records that have a specified flag checked. The drop-down list displays the names of all defined media flags. With this feature, you could define a flag just for reporting purposes and check it for the specific media records you want to use on your report. For example:



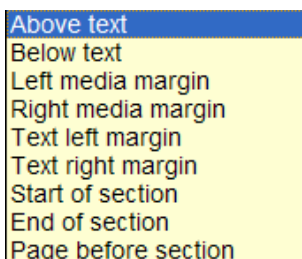
When the **Flag** box is empty, multimedia is not limited to a particular flag.

Principal Only

When checked, multimedia will be limited to the **principal** multimedia record attached to each data item.

Placement

The **Placement** box allows you to specify where the multimedia will appear on the report, relative to the linked data item. Choices are:



For the four "margin" placements, the report text will wrap around the left or right side of the multimedia. For the other placements, the report text will not wrap on either side.

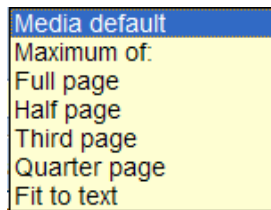
When several multimedia objects have the same placement, they will appear in rows and/or columns.

Show Frame

When **Show frame** is clicked, multimedia in the current group will be shown with a picture frame, as specified on the [Frames page](#).

Width and Height

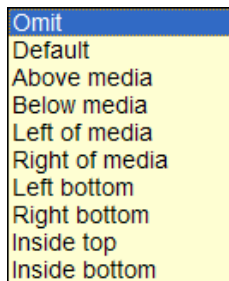
The **Width** and **Height** boxes allow you to control the size of the pictures. Choices are:



Each media record can have a **Preferred size**, which is used when the **Media default** choice is selected. For **Maximum of:**, the text box to the right will be enabled and you can enter a value. For **Fit to text**, the size of the picture will be limited by the adjacent text paragraph describing the linked data object.

Title and Caption Placement

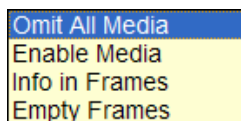
The **Title** and **Caption Placement** boxes allow you to control the placement of the title and caption text for pictures in the current group. Choices are:



Inside top and **Inside bottom** will produce placements inside the picture frame, on top of the picture itself. With these placements no extra space is required to display picture titles and captions. You may need to change the font to white or some other light color in order to make it visible in front of a dark picture.

Master

When printing drafts of a report, you may wish to **omit** the body of pictures, to save on ink and decrease printing time. Or, you may intend to have your report published, and the publisher will be adding the pictures to the pages, so you don't need a printed image. The **Master** box controls this feature. When the body of a picture is omitted, space for the picture will still be reserved, and the picture frame will still be printed. The choices on the drop-down list are:




The **Information in frames** choice will print the image filename and other related information about the picture, instead of the image.

Omit Duplicates

When multimedia is linked to several data items, or when data items appear in multiple places in the report, you may see the same picture shown more than once in the report. To avoid this, click the **Omit duplicates** check box. Only the first occurrence of a picture will be included.

Title Page Picture

A report can have a picture on the title page. Type the filename into the **Title page picture** box, or click the

Open File  button to browse for the file.

Title and Caption Font Buttons

The **Title** and **Caption** font buttons are used to display and select the fonts used in the report for multimedia titles and captions.

Reset Button

Click the **Reset** button to set all multimedia choices back to their default choices.

Report Options View: Media Page (Calendar Reports)

Calendar reports can include pictures. You can make wall calendars that display one of your favorite genealogy photos for each month. The pictures will be shown on separate pages, before the associated month.

Smythe.GDB: CALENDAR Report Options

Key Front Sections Back Headings Content **Media** Format Frames

Month	Picture File Name
(Title Page)	
January	
February	
March	
April	
May	
June	
July	
August	

Master: **Enable media** ☒ Show Frame Title Font: 8 Arial

Title Placement: **Omit** Caption Placement: **Omit** Caption Font: 8 Arial

Reset

Make Report Save Options Reload Defaults Close

Picture List

The **Picture** list box displays one row for each month selected for output, and additional row at the top for an optional picture on the title page. Each row has two columns: the **Month name**, and the **Picture Filename**.

- To specify a picture for a month, click on the **Picture Filename** column and type the name of the image file.
- The **Open File Dialog** will open and allow you to browse for the file.

Master

When printing drafts of a report, you may wish to **omit** the body of pictures, to save on ink and decrease printing time. Or, you may intend to have your report published, and the publisher will be adding the pictures to the pages, so you don't need a printed image. The **Master** box controls this feature. When the body of a picture is omitted, space for the picture will still be reserved, and the picture frame will still be printed. The choices on the drop-down list are:

Omit all media
Enable media
Info in frames
Empty frames

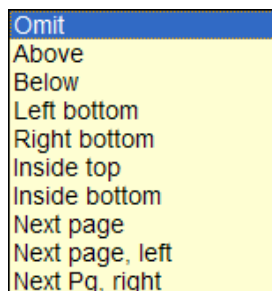
The **Information in frames** choice will print the image filename and other related information about the picture, inside of the frame.

Show Frame

When **Show frame** is clicked, the pictures will be shown with a picture frame, as specified on the [Frames page](#).

Title and Caption Placement

The **Title** and **Caption Placement** boxes allow you to control the placement of the title and caption text. Choices are:



Inside top and **Inside bottom** will produce placements inside the picture frame, on top of the picture itself. With these placements no extra space is required to display picture titles and captions. You may need to change the font to white or some other light color in order to make it visible in front of a dark picture. The **Next page** options will place the text at the top of the following page (the page displaying the associated month). You can place the text centered, left or right. The **Next page** options are useful when you want to show the pictures filling the page.

Title and Caption Font Buttons

The **Title** and **Caption** font buttons are used to display and select the fonts used in the report for multimedia titles and captions.

Reset Button

Click the **Reset** button to set all multimedia choices back to their default choices.

Report Options View: Style Page

Reports that consistently follow **style guidelines** will be easier to understand and navigate. All primary individuals should be presented in a uniform way. Text styles, such as bolding, capitalization, and italics, should aid the reader in identifying and interpreting the data. The **Style page** is used to apply styles to the report.

The screenshot shows the 'Smythe.GDB: DESCENDANT Report Options' dialog box with the 'Style' tab selected. The dialog has a menu bar with options: Key, Front, Sections, Back, Headings, Content, Media, Style (selected), Detail, Format, and Frames. The 'Individual Numbering' section includes a 'System' dropdown set to 'Modified Register (NGSQ)', a 'Generation number superscripts' dropdown set to 'Base on oldest ancestor', a checked 'Italic generation superscripts' checkbox, and an unchecked 'Brackets on notes to distinguish: [1]' checkbox. The 'Back references' section has a 'Name list' dropdown and an unchecked 'Italic' checkbox. The 'Par. Spacing' section has 'Before' and 'Indent' fields both set to 0, and buttons for 'Register Defaults' and 'NGSQ Defaults'. The 'Names' section includes a 'Bolding' dropdown set to '(Initial Primary, Initial Spouse)', a 'Caps' dropdown set to 'Initial Child', and checkboxes for 'Uppercase on surnames only', 'ID numbers', and 'Use nicknames'. The 'Children' section has radio buttons for 'Full names' (selected) and 'Given only'. The 'Events' section includes a 'Sequence' dropdown set to 'Birth, Death, Marr, other', a 'Detail order' dropdown set to 'Date, place, spouse', and dropdowns for 'Child list basic events' (set to 'Brief') and 'Child list other events' (set to 'Full'). At the bottom are buttons for 'Make Report', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Individual Numbering System

A number of systems for individual numbering have been developed in the genealogical community. Choices are:

- None
- Register (NEHGS)
- Modified Register (NGSQ)
- Modified Henry
- Generation
- Generation + Sequence
- D'Aboville

Generation Number Superscripts

Generation number superscripts are placed before the surnames of individual names to indicate their relative generation. They can be relative to the key individual or to an ancestor:

- Omit
- Base on key individual
- Base on oldest ancestor
- Base on immigrant ancestor
- Treat key individual as immigrant

Generations before immigration are given uppercase letters instead of numbers.

Italic Generation Number Superscripts

When **Italic generation superscripts** is checked, the generation number superscripts will appear with the italics style. This is an **NGSQ** default.

Brackets on Notes to Distinguish

Check the **Brackets on notes to distinguish** check box when **Italic generation superscripts** is not checked in order to distinguish the source citation note numbers from the generation superscript numbers. This is a **Register** default.

Back References

Back references on genealogical reports are the sequence of ancestral names in the direct line or the line of interest. The back reference is placed in parentheses after the initial appearance of the primary individual's name. The styles available for back references are:

Omit
Name list
Number list
Number and name list

The **italic** check box can also be checked, which will add italics style to back references. This is a **Register** default.

Paragraph Spacing

The **Space before** box specifies the vertical spacing between paragraphs. The **Indent** box specifies the indentation on the first line of paragraphs.

Bolding and Caps

Individual names can have added styling: **Bolding** and **Capitalization**. The styling can be applied to different categories of individual names:

<input type="checkbox"/> All
<input type="checkbox"/> Initial
<input checked="" type="checkbox"/> Primary
<input checked="" type="checkbox"/> Spouse
<input type="checkbox"/> Child
<input type="checkbox"/> Parent
<input type="checkbox"/> Secondary
<input type="checkbox"/> Primary
<input type="checkbox"/> Spouse
<input type="checkbox"/> Child
<input type="checkbox"/> Parent

Uppercase on Surnames Only

When **Uppercase on surnames only** is checked, the individuals selected for [Caps](#) will be shown with the capitalization on their surnames only.

ID Numbers

If **ID numbers** is checked, Individual ID numbers will be shown after every name on the report.

Use Nicknames

If **Use nicknames** is checked, nicknames defined for individuals will be used after their initial reference.

Children Names

For children names in child sections, either **Given names** or **Full names** may be selected.

Event Sequence

Events on the report can be presented chronologically or with vital events first. Choices from the drop-down list show the orders that are supported:

Birth, Death, Marr, other
Birth, Marr, Death, other
Chronological

Event Detail Order

For each event, either the **date** or the **place** information can be presented first. For family events, the placement of the **spouse** information can also be specified. Choices from the drop-down list for **Event detail order** are:

Date, place, spouse
Place, date, spouse
Spouse, date, place
Spouse, place, date

Child List Event Templates

The event templates used in child paragraphs can be selected from the following choices, for both basic events and other events:

Abbreviate
Brief
Full

Basic events are often abbreviated, and other events are often shown in either brief or full format.

Register Defaults Button

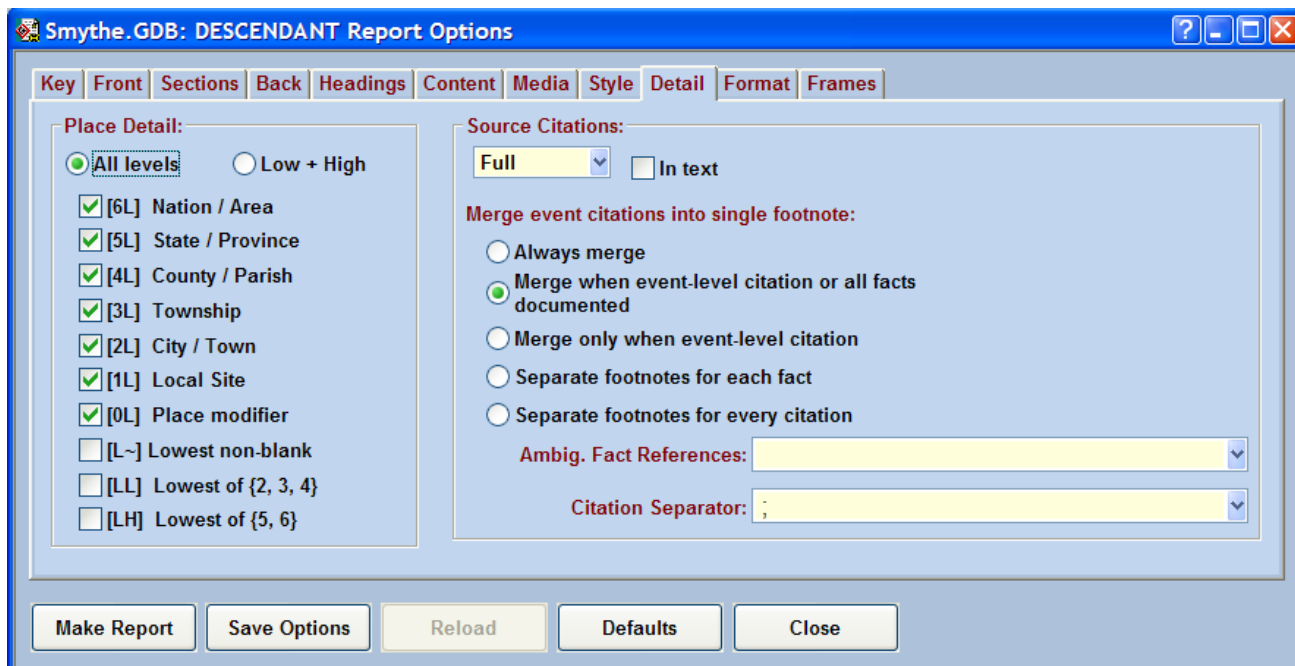
Click the **Register Defaults** button to set style choices on this page according to the recommended style guidelines of the **New England Historical Genealogical Society (NEHGS)**.

NGSQ Defaults Button

Click the **NGSQ Defaults** button to set style choices on this page according to the recommended style guidelines of the **National Genealogical Society Quarterly (NGS)**.

Report Options View: Detail Page

The **Detail page** contains content options for specific details of the data. While the [Content](#) and [Media](#) pages specify options according to types of individuals, the Detail page options apply to data for all individuals, and the report as a whole.



Place Detail

Places can appear with all place levels or with only specific place levels. The default operation is to show all place levels except for the default nation/area.

There is a checkbox for each place level, one for place modifiers, and three for special combinations:

- [6L] Nation/Area
- [5L] State/Province
- [4L] County/Parish
- [3L] Township
- [2L] City/Town
- [1L] Local site
- [0L] Place modifier
- [L~] Lowest non-blank
- [LL] "Level Low" (lowest of {2,3,4})
- [LH] "Level High" (lowest of {5,6})

When a place level is not checked, no place information for that jurisdiction will be shown on the report.

Note: The [LH] and [LL] options prevent the use of the other level selectors.

Place Detail: All Levels

When this option is checked, All place information will be shown on the report.

Place Detail: Low + High

When this option is checked, only the [LH] and [LL] check boxes will be set. This pair produces a "City, State" combination for most place names. It can be selected to save space on the reports.

Level Low ([LL])

When you select the [LL] ("Level Low") check box, Genbox will select the city name (level 2) when it is available, or the township name (level 3) when it is available, or finally the county name (level 4). Only one level of information will be shown from the group {2,3,4}.

Level High ([LH])

When you select the [LH] ("Level high") check box, Genbox will select the state name (level 5) when it is available, otherwise the nation/area name (level 6). Only one level of information will be shown from the group {5,6}.

Source Citations

Source citations can be included on reports, in either full or brief format. The **Citations** box offers the following choices:

Omit
Full
Brief

The **Brief** format will omit annotations.

If the **In text** check box is checked, the source citations will appear in the text body, immediately after the data they are linked to. Otherwise, source citations will appear in footnotes, or in endnotes if **Include endnotes** is checked on the [Back page](#).

Merge Event Citations into Single Footnote

Each fact stored in Genbox can have one or more source citations. Events can have source citations on the date, place, age at time of the event, on the entire event, on the notes, etc. When narrative reports are produced, these source citations can be grouped into footnotes according to various schemes. Some people prefer to have a single footnote number at the end of each sentence, with all source citations in one group, although this may obscure which source documents which fact. Other people like to see a separate footnote for each fact, although this means there may be a distracting number of footnote numbers in the body of the text. The **Merge event citations into single footnote** selection controls when multiple citations are merged into grouped footnotes. It provides the following choices:

- Always merge
- Merge when event-level citation or all facts are documented
- Merge only when event-level citation
- Separate footnotes for each fact
- Separate footnotes for every citation (never merge)

Ambiguous Fact References

When source citations for several facts have been merged into a single footnote, it may be unclear which source citation documents which fact. The **Ambiguous fact references** box allows you to add a label before each grouping of source citations, where the label refers to the type of fact being documented. You can type your own text or choose from the drop-down list:

[LABEL]:
[CR][LABEL]:

The special keywords [LABEL], [CR], and [TAB] are recognized for this field. If this box is left blank, no label will be used (the default).

Citation Separator

When multiple citations appear in a footnote, they are normally separated with a semicolon (;). If there are many citations, or they are lengthy with their own internal semicolons, this separator may be hard to find, making the footnote difficult to read and understand. The **Citation separator** box allows you to enter your own separator text to appear between citations in a merged footnote. You can type your own text or choose from the drop-down list:

.
[CR][CR]
[CR][TAB]

The special keywords [CR] (carriage return) and [TAB] are recognized for this field.

Note: if the special keyword [NOSEP] appears in the annotation text of a source citation, no separator will follow that source citation when followed by another source citation in a merged footnote. This allows you to override the default citation separator specified here, making it possible to string two source citations together into the same thought. For example, you could end the first citation's annotation text with something like "..., but see also [NOSEP]".

Report Options View: Format Page

The **Format** page is used to specify the margins, indents, spacing, main fonts, pagination, and page numbering for the report.

The screenshot shows the 'Smythe.GDB: DESCENDANT Report Options' dialog box with the 'Format' tab selected. The dialog has several sections for configuring the report's appearance:

- Margins:** Includes input boxes for 'Page top/bottom' (1), 'Text left/right' (1), 'Media left/right' (0.25), and 'Gutter' (0). There is a checkbox for 'Flip odd/even'.
- Body:** Includes font settings for 'Data font' (12 Times New Roman), 'Label font' (12B Arial), 'Gen. Notes' (12 Times New Roman), 'Res. Notes' (12 Times New Roman), and 'Spacing' (Single).
- Outline indent:** Includes an input box for 'Outline indent' (0.25) and a checkbox for 'Short names'.
- Media min separation:** Includes an input box for 'Media min separation' (0.1) and checkboxes for 'Short dates', 'Short places', and 'Place context' (checked).
- Page Numbers and Report Date:** Includes dropdowns for 'Number position' (Bottom right), 'At section start' (Omit), 'Start' ([PAGE]), 'Font' (8 Arial), 'Renummer each section as page 1' (checkbox), and 'Date position' (Omit).

At the bottom of the dialog are buttons for 'Make Report', 'Save Options', 'Reload', 'Defaults', and 'Close'.

Page Top/Bottom Margins

Use the **Page top/bottom** boxes to set the margins for the top and bottom of each page.

Left/Right Margins

Reports have two sets of left/right margins:

- Use the **Text left/right** boxes to set margins for the text.
- Use the **Media left/right** boxes to set margins for pictures.

Separate margins for multimedia allow pictures to extend into the space that serves as a margin around the text. This allows pictures to be larger and leaves more room for text within the text margins. Small pictures can fit completely into the media margins, allowing the text to fill the page to the text margins.

Gutter Margin

The **Gutter margin** reserves extra space on the "binding" side of each page (left side for odd-numbered pages, and right side for even-numbered pages). A gutter margin is useful when the report is intended to be bound with a binding that will obscure part of the page.

Flip Odd/Even

Clicking **Flip odd/even** will cause the settings for left and right margins to reverse for even-numbered pages.

Outline Indent

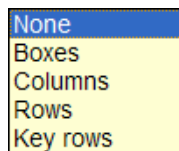
For Outline Descendant reports, the **Outline indent** box can be used to specify the indent for children lines beneath their parents. The default is .25 inches. You may wish to decrease this value when there are many generations, and you want the report to fit within one page width.

Media Min Separation

The **Media min separation** box is used to specify the minimum spacing between pictures on the report.

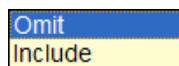
Report Lines

For **Custom** and **Family Group** reports, you can include lines on the reports to indicate divisions. Choices are:



The Key row choice is useful when the table columns wrap onto multiple rows.

For **Pedigree** and **Outline Descendant** reports, you can include lines connecting the individuals. Choices are:



Short Names

Click **Short Names** to format individual names in the "short" format. This format abbreviates middle names.

Short Dates

Click **Short Dates** to use short date formatting for dates on the report.

Short Places

Click **Short Places** to use the "Short name" identifier for places where a short name has been identified.

Place Context

When Genbox produces a report, place names can be remembered when they are added to a paragraph. Subsequent references to that place within the same context will use a shortened form of the place name, usually just the first level. This removes a lot of redundancy and makes the generated paragraph sound more natural. Unlike the "Short Places" option, place context does not need short names defined in order to work.

- Click **Place Context** to remember place names in each context and use the shortened form of the names.
- Clear this option to always see all place levels on place names within the report.

Note: setting and clearing this option also selects similar processing for **date context**.

Data and Label Font Buttons

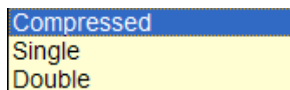
There are four font buttons for selecting the fonts used in the body of the report:

- **Data Font**
- **Label Font**
- **General Notes Font**
- **Research Notes Font**

Normally, general notes and research notes will use the same font as other data appearing on the report. You can change their font styles if you wish to make them more visible. Sometimes it is helpful to be able to tell which text is being generated by the event templates, and which text is coming directly from the general notes or research notes. You may wish to show the general notes in blue, and the research notes in red, bold, and italic, for example.

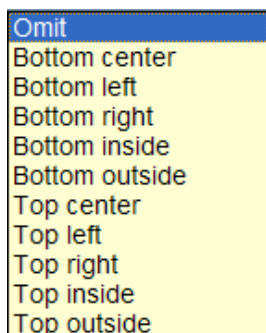
Line Spacing

The **Line spacing** on a report can be varied, which will permit more or less information to fit on each page. Choices are:



Page Number Position

The **Page number position** box is used to select the placement of the page number. Choices are:



Page Number At Section Start

The **Page number at section start** box is used to control the placement of the page number at the start of sections, which often is different than on normal pages. The placement choices are the same as for [normal pages](#).

Starting Page Number

The **Starting Page Number** box is used to specify the starting page number for the report, and also the formatting of the page number. For formatting, you can include any prefix or suffix.

You can use the special keyword [PAGE] to insert the word "Page" in the correct output language.

The default is "[PAGE] 1".

Page Number Font

The **Page Number Font** button can be used to select the font for page numbering.

Renumber Each Section as Page 1

When checked, the page number for each section on the report will be reset to 1.

Date Position

Use the **Date position** box to specify where the report generation date should print on the report:

Omit
Bottom center
Bottom left
Bottom right
Bottom inside
Bottom outside
Top center
Top left
Top right
Top inside
Top outside

Report Options View: Frames Page

As the finishing touch, **frames** can be added to the title page, pictures, and headings. Frames are excellent for setting off an item from its surroundings, adding color and drawing attention. Frame choices include corner shape, corner fill, sides to include, pixel width, color, corner size, margin size, matte, shading, and shadow. These options are set on the **Frames** page.

The screenshot shows the 'Smythe.GDB: DESCENDANT Report Options' dialog box with the 'Frames' tab selected. The dialog has a tabbed interface with tabs for Key, Front, Sections, Back, Headings, Content, Media, Style, Detail, Format, and Frames. The Frames tab contains settings for Title Page Frame, Pictures, and Headers / Footers.

Title Page Frame:

- ☐ Include
- Outer: Corner Shape: inset, Fill: all, Sides: all, Width: 4, Colour: black, Sizes: 0.5 corner
- Inner: Corner Shape: straight, Fill: all, Sides: all, Width: 4, Colour: black, Sizes: 0.5 marg

Pictures:

- Frame: bevel, ☒ omit, Width: 4, Colour: black, Sizes: 0.2 corner
- Matte: [matte icon], Shadow: omit, Width: 8, Colour: black, Sizes: 0.2 matte

Headers / Footers:

- Page header frame: omit, Width: 0, Colour: black
- Section header frame: omit, Width: 0, Colour: black
- Generation header frame: omit, Width: 0, Colour: black
- Page footer frame: omit, Width: 0, Colour: black

Buttons at the bottom: Make Report, Save Options, Reload, Defaults, Close.

Title Page Frame

Check the **Include** check box to produce either a single or double **Title page frame**. A double frame will be drawn with independent option settings for the outer and inner frame. Depending on the [Corner shape](#) and [Corner margin](#) size, the frames may overlap, producing a complex design.

Picture Frames

Pictures on the report have a thin line rectangular frame by default. You can use the options here to create more elaborate frames.

Heading Frames

The sides, width, and color can be specified for **Page header frames**, **Section header frames**, **Generation header frames**, and **Page footer frames**. The default for sides is **Omit**.

Corner Shape

The choices available on the drop-down lists for corner shapes are:

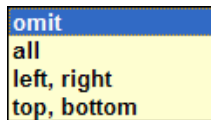
- omit
- straight
- rounded
- oval
- ellipse
- arrow
- bevel
- inset
- inset round
- dbl round
- zig-zag
- inset arrow

Corner Fills

Frame corners can be **filled** with the **Frame color**, for added visual effect. Click the **Corner fill** check box to select.

Sides to Include

Individual sides of the frame can be selected from inclusion. Choices from the drop-down list are:

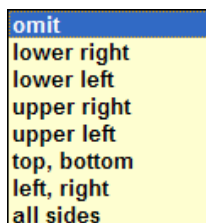


Frame Width

The **Frame width** boxes allow entry of the pixel width for the frame. A value of 0 means use the narrowest line possible.

Shadows

Picture boxes can have a simulated **shadow**. The **Shadow placement** boxes provide the following placement choices:



Colors for Frame, Matte, Shadow

There is a **Color** button to select the color for each frame. Pictures have an additional **Matte** color button and a **Shadow** color button. The matte is the open area between the frame and the picture. Clicking any of these color buttons will open the [Select Color Dialog](#) for selection of the color.

Sizes for Corners, Margins and Matte

The **Corner size** specifies the size of the corner area of the frame. The corners can have special shapes. A larger corner size value will produce larger shapes.

The **Margin size** is the amount of white space between the (rectangular) frame and its contents. This value may need to be increased when the frame is not rectangular, as some choices for corner shape can result in a visible frame that extends into the text inside the frame.



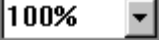



The **Matte size** specifies the size of the matte used with picture frames. The matte is the open area between the frame and the picture. A value larger than zero is necessary in order to see the matte color.

Report View


The **Report View** appears when a report is generated by clicking the **Make Report** button on the [Report Options View](#). The first page of the generated report will be shown in the view. You can use the scroll bars at the right and bottom edges to scroll.

Using the Chart/Report Toolbar

When the Report View opens, the [Chart/Report Toolbar](#) will appear next to the main toolbar. There are five tool buttons and a drop-down list box. The current tool will have a pressed appearance. Click on a tool button to select a tool:

	Select Tool
	Magnify Tool
	Zoom Size Tool
	Text Tool
	Picture Tool
	Line Tool

Zooming

When you want to see more of your Report at once, you need to **zoom out**. If you are interested in seeing more detail in a small area, you need to **zoom in**. To zoom, click the Magnify tool .

- When the Magnify tool is selected, click the **left** mouse button anywhere on the Report to **zoom in**.
- Click the **right** mouse button to **zoom out**.

The zoom size will increase or decrease by about 20% for each click. The location clicked will be positioned as close as possible to the center of the view.

You can also use the **Zoom size tool**  to quickly set the zoom size at preset sizes:


- Full size
- Full page
- Full doc
- 2400%, 1200%, 800%, 400%, 200%, 160%, 110%, 100%, 90%, 75%, 50%, 25%, 12%, 8%, or 4%

Full size is the same as 100%. **Full page** will pick a zoom size just large enough to show a complete page. **Full doc** will pick a zoom size that will allow the entire report to fit on the screen.


When the zoom size of pages is smaller than the view window, the pages will be tiled in rows across the view.

Adding Annotations

Annotations are short lengths of text that can be typed on top of the report. They can be used to draw attention to certain data items, or provide explanatory text.

- **To add an annotation**, click the Text Tool .
- Click the location on the report where you want the annotation to start.
- Type the text.
- To end the annotation, click elsewhere to start a new annotation, or click a different tool button.

Once on a report, an annotation can be selected, sized, and moved. You can also change its font properties:

1. **To change the font properties of an annotation**, first select it.
2. Double-click the Text Tool .
3. The [Select Font Dialog](#) will appear, allowing you to select font properties for the annotation and for new annotations.


The default font styles for annotations are bold, italic, and red.

Adding Pictures

Additional pictures can be added to a report after it has been generated.


1. **To add a picture**, click the Picture Tool .
2. Drag a selection rectangle to specify the size and location for the picture.
3. The [Media Pick Dialog](#) will open. Select the picture you want to include on the report.

If no picture is selected from the Media Pick Dialog, only a frame will be added to the report. Frame properties for empty frames and pictures on the report can be changed:

- **To change the frame properties of a picture**, first select it.
- Double-click the Picture Tool .
- The [Picture Tool Options Dialog](#) will appear. Select the frame properties for the picture and for new pictures.


Adding Lines

Freehand lines can be added to a report after it has been generated. You can draw arrows, circles, and connecting lines between annotations and text.

1. **To add lines**, click the Line Tool .
2. Click the locations where you want the end points of the line segments to be.
3. To draw curves, hold the mouse button down while moving.
4. Click the same location twice to end the line figure.

The endpoints of each line segment in the figure will be shown with handles. You can reposition individual endpoints by dragging on the handles.

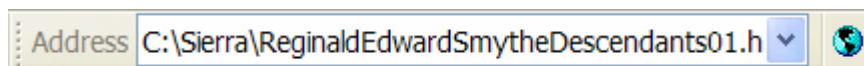
The thickness and color of a freehand line can be changed:

- **To change the properties of a freehand line**, first select it.
- Double-click on the Line Tool .
- The [Line Tool Options Dialog](#) will open. Select the new values for line width and color.

Web Page View

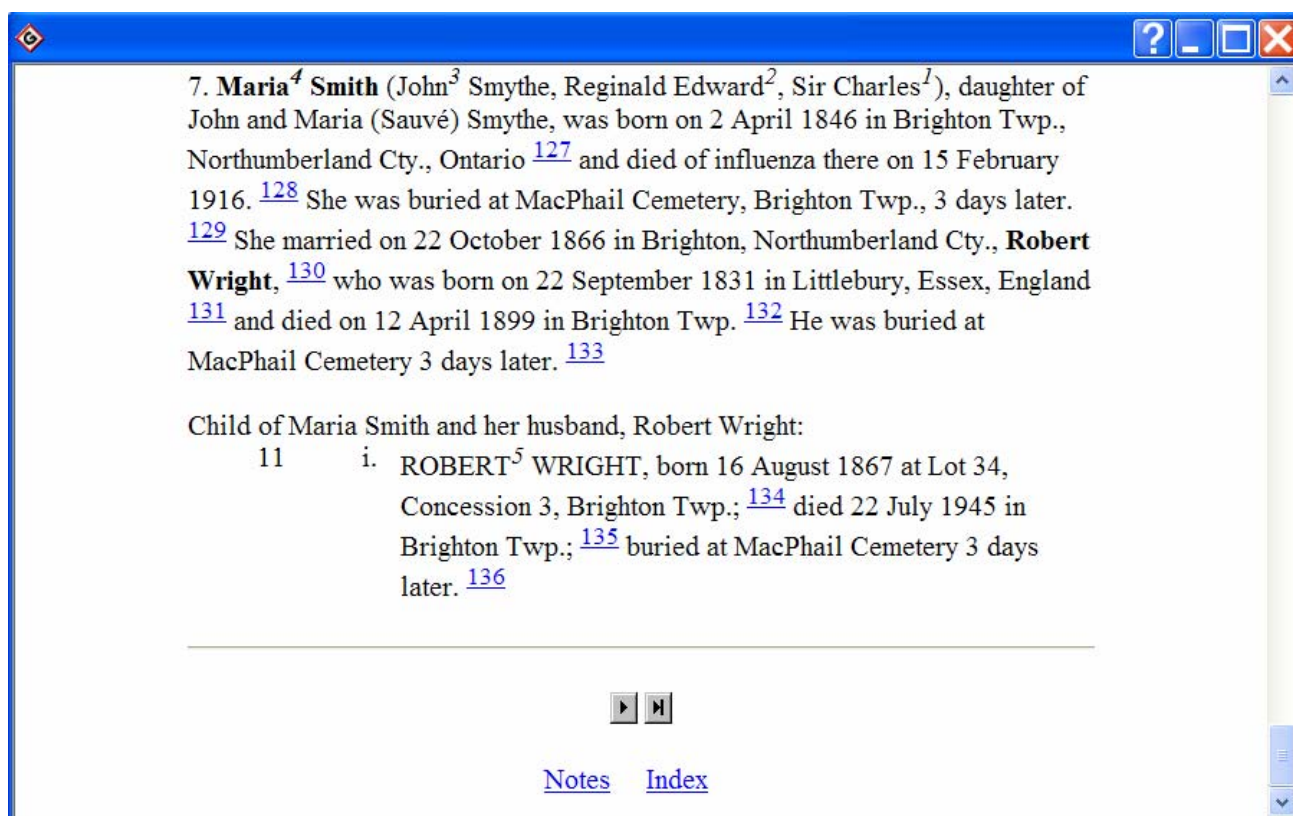
The **Web Page View** appears when the **Make Report** button is clicked on the [Report Options View](#), and the **Make web pages** check box is checked.

The Web Page View functions as a standard web browser. An **address bar** appears that displays the URL of the current page.



A **Favorites** menu is added to the main menu bar.

The first page of the generated web pages will be shown in the view.



- Use the record movement buttons on the main toolbar as **page movement buttons** to move to the first, previous, next, and last generated page.
- Use the **back** and **forward** buttons as the normal web browser back and forward commands.

Export Options View

When you want to share your data with others, choose Export Data from the Files menu, then either GEDCOM file or Genbox Database. The **Export Options View** will then appear, allowing you to choose options for the export. Options are arranged onto three pages:

[Key Page](#)
[Header Page](#)
[Data Content Page](#)
[Other Content Page](#)
[Options Page](#)

Buttons

There is a row of buttons at the bottom of the view:

- Click the **Make Export File** button when you are ready to produce the export file. The Save File Dialog will appear. Enter the name for the file, then click **Save**.
- Click the **Save** button if you want to save your export options settings for use later. On the Save File Dialog, enter a name for the options file, then click **Save**.
- Click **Reload** and choose the file from the Open File Dialog when you want to reload a saved export options file.
- Click **Defaults** to reset all export options to Genbox defaults.

Export Options View: Key Page

Like Genbox reports, an export file is based on **key individuals**. The key individuals determine the **starting points** for the export. When there are several key individuals, each of them will be treated as the starting individual in turn, with the results merged into a single export file.

The keys are specified on the **Key page**. When the [Export Options View](#) is first opened, the default will be the list of all individuals in the database.

The screenshot shows the 'GEDCOM Export Options' dialog box with the 'Key' tab selected. The 'Key Individuals to Include:' section has a 'Select...' button and a checked 'Use saved keys' checkbox. Below this is a table with one row containing 'Individuals' and 'Add key'. To the right of the table are buttons for 'Select List...', 'Select Query...', and 'Clear Keys'. The 'Export format:' dropdown is set to 'GEDCOM 5.5'. The 'Generations to go from Key Individuals:' section has two rows for 'Ancestral' and 'Descendant', each with radio buttons for 'All' and 'None' (both 'None' are selected), and input fields for 'Number' (both set to 1) and 'To date'. At the bottom are buttons for 'Make Export File...', 'Save ...', 'Reload', 'Defaults', and 'Close'.



Key List

The **Key** list displays the names of the keys, one on each row.

- **To add a key name**, click where it says "Add key", then type the name of the key.
- A pick dialog will open, displaying a list of the matching names. Select the intended name from the list.

Keys can also be added by clicking the [Select button](#).

Besides key names, **lists** and **queries** can also be specified for determination of the keys for the export. When a row contains the name of a list or query, an icon will precede the name, identifying its type:

-  List
-  Query


A list name is added with the [Select List button](#). All members of the list will be considered keys. Only individual lists can be selected.

The name of a saved query can also be specified. The query name is added with the [Select Query button](#). The resulting list of individuals when the query is run will be considered key individuals.

Select Button

Click the **Select** button to add keys using the [Individuals Pick Dialog](#).


Select List Button

Besides entering the names of keys, **lists** can also be specified for determination of the keys for an export. The **List icon**  identifies rows that contain the name of a list. All members of the list will be considered keys for the export.

To add a list name, click the **Select List** button. The [List View](#) will open, allowing you to select a list name. Click the name of a saved list, then click the **Select List Name** button. Or, click the **Select List Members** button to add the names of the members to the list box instead of the list name. The export will be the same either way, but each approach has its advantages:

- Click **Select List Name** if you plan to save your export options for future use. Then, the next time the export options are used, the **current** members of the named list will become keys.
- Click **Select List Members** if you want to selectively remove some names or reorder the names before making the export.

Select Query Button

Besides entering names and lists, **queries** can also be specified. The **Query icon**  identifies rows that contain the name of a query. The resulting list of individuals when the query is run will be considered key individuals.

To add a query name, click the **Select Query** button. From the [Open File Dialog](#), select the name of a saved query definition. Query definition files have the extension .QRY.

- The query is not run until the **Make Export File** button is pressed. If you save your export options for future use, any queries will run each time an export is produced, and the results at that time will be used as the key individuals.

Clear Keys Button

Click the **Clear Keys** button to remove all of the names from the list box.

Use Saved Keys

When the export options are saved to an export options file, the current keys are saved along with the options. When the export options file is reloaded, the saved keys can be reloaded as well by clicking the **Load Saved Keys** button. With this feature, you can save a favorite list of keys, including lists and queries, and select them again with just one click.

Export Format

The **Export format** box allows you to choose the format for the export file. For GEDCOM files, currently the only choice is **GEDCOM 5.5**. Future versions of Genbox may support later versions, as they are finalized. For Genbox files, currently the only choice is **GENBOX 3.0**.

Generations to Go from Key Individuals

The export options file can include the direct ancestors or direct descendants of the key individuals.

All

When **All** is selected, all direct descendants (or ancestors) will be selected for inclusion in the export, as well as their spouses.

None

When **None** is selected, only the key individuals will be exported. Spouses will not be exported, unless they are also a key individual.

Number of Generations

The direct lines can be limited to a certain **number of generations** removed from the key individuals. By counting the key individual as generation 0, his parents are generation 1, his grandparents are generation 2, and so on. Going the other way, his children are generation 1, and grandchildren are generation 2. So if the descendant "Generations to go from Key Individuals" is set to 1, only the key individuals, their spouses, their children, and their children's spouses will be included on the export.

1. To limit a direct line to a certain number of generations, click the **Number** radio button.
2. Type the number in the box, or use the up/down arrow buttons to set the value.

If you want to export just the key individuals **and their spouses**, but no children, set the number of descendant generations to zero instead of "None".

To Date

The direct lines can be limited to a certain **date**. This date is meant to totally enclose the life spans of the individuals to be exported; individuals living even partly beyond the range are excluded.

- For **Ancestral** lines, click the **To date** radio button and enter the **earliest date for birth** in the box.

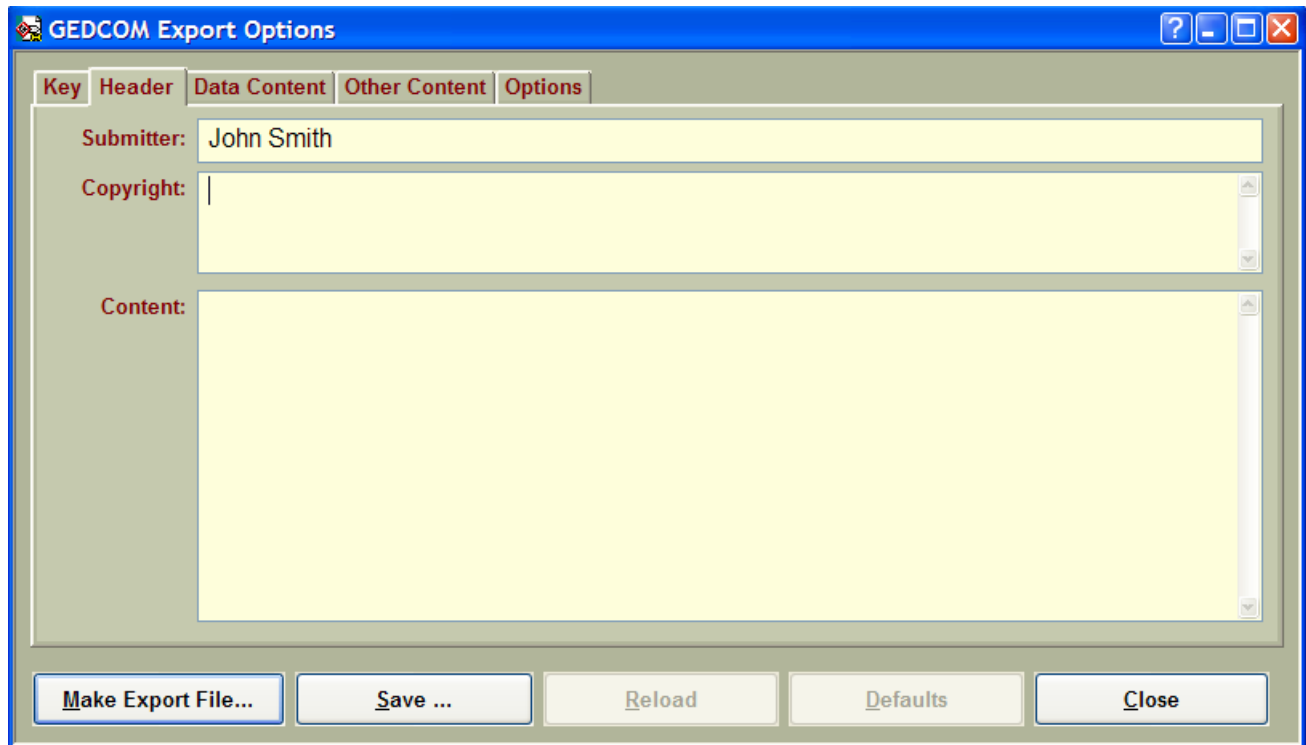
Ancestors must be born **on or after** the specified date to be included. When ancestors are born before the specified date, they will be omitted. When the birth dates are unknown but another event date places them before the specified date, they are also omitted.

- For **Descendant** lines, click the **To date** radio button and enter the **latest date for death** in the box.

The descendant must be **deceased** by the specified date. If the date of death is unknown, and the **Living** attribute flag has not been set, Genbox will determine if the descendant should be considered deceased by taking the birth date and adding the default maximum life span value specified on the [Preferences View, Dates page](#).

Export Options View: Header Page

The **Header page** is available when exporting to a GEDCOM file. It provides places to enter header information about the file.



The screenshot shows the 'GEDCOM Export Options' dialog box with the 'Header' tab selected. The dialog has a blue title bar and standard window controls. Inside, there are four tabs: 'Key', 'Header', 'Data Content', 'Other Content', and 'Options'. The 'Header' tab is active, showing three input fields: 'Submitter' (containing 'John Smith'), 'Copyright' (empty), and 'Content' (empty). At the bottom, there are five buttons: 'Make Export File...', 'Save ...', 'Reload', 'Defaults', and 'Close'.

Submitter

The **Submitter** field stores a link into the Researchers Table. Enter the name of the researcher that should be shown as the originator of the export file.

Copyright

Enter your copyright information for the export file.

Content Description

Enter a description of the contents of the database in the **Content** box.

Export Options View: Data Content Page

The content for each individual, and for other data types, can be specified on the **Data Content** page.

The screenshot shows the 'GEDCOM Export Options' dialog box with the 'Data Content' tab selected. The dialog has four tabs: 'Key', 'Header', 'Data Content', 'Other Content', and 'Options'. The 'Data Content' tab is active, showing options for 'Individual Content' and 'Other Records'.

Individual Content:

- ☒ Name variations
- ☒ Other identifiers
- ☒ Attributes
- ☒ Flags
- ☒ Alternate parents
- ☒ Alternate events
- ☒ General notes
- ☒ Research notes
- ☒ Source citations

Events:

Contacts:

Living individuals:

Other Records:

- ☒ Sources
- ☒ Media
- ☒ Researchers
- ☐ Correspondence Log
- ☐ Research Targets
- ☐ Projects / Objectives
- ☐ Places
- ☐ Lists
- ☒ linked only
- ☒ linked only
- ☒ linked only

Buttons at the bottom:

Individual Content

The birth name and links to the preferred parents are included automatically. Other subrecords for individuals can be independently selected.

Subrecords

Subrecords can be included by checking the check boxes:

- Name variations
- Other identifiers
- Attributes
- Flags
- Alternate parents
- Alternate events
- General notes
- Research notes
- Source citations

Event Types

The event data included in the export file can be limited by event type. Choices are:

Omit
All types
Birth only
Birth, Death
Birth, Death, Marr
Basic
Group A
Group B
Group C
Group D

Contact Record Types

The contact records included in the export file can be limited by type. Choices are:

Omit
All
Preferred
Home
Work
School
Other

All Button and None Button

- Click the **All** button to select all individual content options.
- Click the **None** button to clear all individual content options.

Other Records

In addition to individual records, other types of records can be independently selected for inclusion in the export file.

Record Types

Other record types can be selected by clicking the check boxes:

- Sources
- Media
- Researchers
- Correspondence Log
- Research Targets
- Projects / Objectives
- Places
- Lists

Linked Only

When **Linked only** is checked for **Sources**, **Media**, or **Researchers**, only the records that are linked to individual records which have been selected for export will be included.

All Button and None Button

- Click the **All** button to select all of the other record types.
- Click the **None** button to clear all the other record types.

Living Individuals

By default, living individuals are exported with the normal content. If you plan to distribute your data outside of your own family, you may wish to restrict the content included for living individuals, to respect their privacy. The **Living individuals** box presents the following choices on its drop-down list:

Omit
Normal Content
Names, Links
Sex, Links
Sex Only

When **Omit** is selected, living individuals and all links to them are treated like they are not even in your database. This means lineages will be ended when they reach a living individual.

When **Identifiers, links** is selected, all the names and identifiers normally selected for output and relationships of living individuals are included, but no other information. No events, dates, or places.

When **Sex, links** is selected, the name will be replaced by "Male" or "Female", so that only the sex and relationships of living individuals are shown. This provides a level of privacy higher than **Identifiers, links**, because names are not shown.

Sex only is like **Sex, links**, only the information on children is omitted, even if the children are deceased.

Defaults Button

Click the **Defaults** button to reset all content options to Genbox defaults for the selected output file type.

Export Options View: Other Content Page

The **Other Content Page** contains options for exporting record types that are not related to particular individuals or research.

The screenshot shows the 'GEDCOM Export Options' dialog box with the 'Other Content' tab selected. The dialog has a blue title bar and standard window controls. Inside, there are five tabs: 'Key', 'Header', 'Data Content', 'Other Content' (selected), and 'Options'. The 'Other Content' tab contains a section titled 'Other Records:' with six checkboxes arranged in two columns: 'Event Templates', 'Source Templates', 'Identifier Types', 'Individual Flag Definitions', 'Place Flag Definitions', and 'Media Flag Definitions'. Below these is a 'Language:' section with a dropdown menu currently showing '(all languages)' and two buttons, 'All' and 'None'. A 'Defaults' button is located below the checkboxes. At the bottom of the dialog are five buttons: 'Make Export File...', 'Save ...', 'Reload', 'Defaults', and 'Close'.

Other Records

Other record types can be selected by clicking the check boxes:

- Event Types
- Source Types
- Identifier Types
- Individual Flag Definitions
- Place Flag Definitions
- Media Flag Definitions

Language Selector

The **Language Selector** allows you to restrict the export of records to only those for a particular language. The default is all languages:



All Button and None Button

- Click the **All** button to select all of the other record types.
- Click the **None** button to clear all the other record types.

Defaults Button

Click the **Defaults** button to reset all content options to Genbox defaults for the selected output file type.

Export Options View: Options Page

The **Options** page contains additional options, most of which are enabled only when exporting to a GEDCOM file.

The screenshot shows the 'GEDCOM Export Options' dialog box with the 'Options' tab active. The 'Intended receiving system' is set to a dropdown menu. 'Maximum line length' is 70, and 'Character set' is ANSEL. Under 'Notes', 'Include embedded source citations' is unchecked. 'Field codes' has 'Value only' selected. 'Continued lines' has 'Break before space' selected. A 'Defaults' button is on the left. At the bottom are buttons for 'Make Export File...', 'Save ...', 'Reload', 'Defaults', and 'Close'.

The options that are available when exporting to either a Genbox database or a GEDCOM file are:

[Override Privacy Flags/Marks](#)
[Override Exclude Flags](#)
[Include Change Dates](#)

The option available only when exporting to a Genbox database is:

[Initialize Database](#)

The options available only when exporting to a GEDCOM file are:

[Intended Receiving System](#)
[Maximum Line Length](#)
[Character Set](#)
[Include Embedded Citations](#)
[Field Codes Format](#)
[Continued Lines Format](#)

Override Privacy Flags/Marks

When **Override privacy flags/marks** is checked, parent relationships and spouse relationships that have the **Private** flag checked will be exported with their true relationships. Normally, private parent relationships are treated as "biological" and private spouse relationships are treated as "married" when exporting data.

Override Exclude Flags

When **Override exclude flags** is checked, parent links, spouse links, events, and other data items that have the **Exclude** flag checked will also be included in the export.

Include Change Dates

All records in the database have change dates. If you want to include this information in your export file, click **Include change dates**. This information can significantly increase the size of a GEDCOM file, and most receiving systems do not import it.

Initialize Database

When checked, the exported Genbox database will first be initialized with data in the GBXDBINI.GDZ initialization database. This includes the default set of place names, event types, source types, flags, and other records normally used to initialize a new Genbox database. This data will appear in the exported Genbox database in addition to the data in the current database this is selected for export.

When not checked, only the data that is selected for export will be written to the new Genbox database.

This option is checked by default.

Intended Receiving System

Choose the **Intended receiving system** from the drop-down list, or type in your own:

(unspecified)
ANSTFILE (Ancestral File)
BROSKEEP (Brother's Keeper)
FTW (Family Tree Maker for Windows)
GENBOX (Genbox Family History)
GENViewer
Legacy
PAF (Personal Ancestral File)
RootsMagic
TempleReady
TMG (The Master Genealogist)

The choice of intended receiving system affects the defaults for other GEDCOM options on this page, based on known compatibility/incompatibility. The default is "(unspecified)".

Maximum Line Length

The **Maximum line length** value determines the maximum length for note lines in the GEDCOM file. It can be a value from 50 to 255 characters. The default value is 70 characters.

Character Set

The **Character set** box determines the character set that will be used in the export file. Choose a character set that can be read by the intended receiving system. Choices are:

ANSI
ANSEL
UNICODE
UTF-8

Include Embedded Citations

When **Include Embedded Citations** is checked, source citations embedded in notes will be included in the GEDCOM file. Excluding embedded notes is useful when exporting to systems that the presence of this data would interfere with the import of the note text itself (such as for Personal Ancestral File). For most systems, embedded source citations are simply skipped, as unrecognized lower-level data.

Field Codes Format

Field codes in notes can be exported in one of three ways:

- Value and code
- Value only
- Code only

The default is **Value and code**; the codes are placed in a lower level beneath the corresponding value text, which allows receiving systems that don't understand the codes to simply store the value portion. This results in exactly the same text as shown in the note preview mode. For systems where the codes in a lower level would interfere with the import of the note text itself, the "value only" option can be selected.

Continued Lines Format

Notes that extend longer than one line can be broken in one of two ways:

- Break before space
- Break mid-word

Some systems, such as Personal Ancestral File, require **Break mid-word**, because spaces at the beginning and ending of lines are stripped on import. Other programs, such as Family Tree Maker, incorrectly assume a space between every continued line, so they have better results when **Break before space** is selected. The default is **Break before space**.

Import File View

When [Import Data from GEDCOM File](#) or [Import Data from Genbox Database](#) is selected from the File menu, and a GEDCOM file (*.GED) or Genbox Database (*.GDB) is selected from the Open File Dialog, the **Import File View** appears. It has three pages. The **Header page** displays information about the file. The **Content page** allows you to select which types of data will be imported. The **Options page** contains options you can set to control the import.

[Header Page](#)
[Content Page](#)
[Options Page](#)

Buttons

Imported data can be handled in two ways:

- Click the **Append to Current Database** button to add the imported data to the currently open database.
- Click the **Import to New Database** button if you want to place the data in a new database.

Import to a New Database is recommended when you are unfamiliar with the data. That allows you to view it, produce some charts, and make a determination as to whether the data or a portion of the data would be helpful in your main database. Then you can do another import and choose the **Append to Current Database** button. While appending data, no attempt to reconcile duplicate individual records is made. This can be done later with the [Match Finder Tool](#).

You may wish to view the GEDCOM file directly before processing it. If so, click the **View File** button.

Troubleshooting Character Set Problems

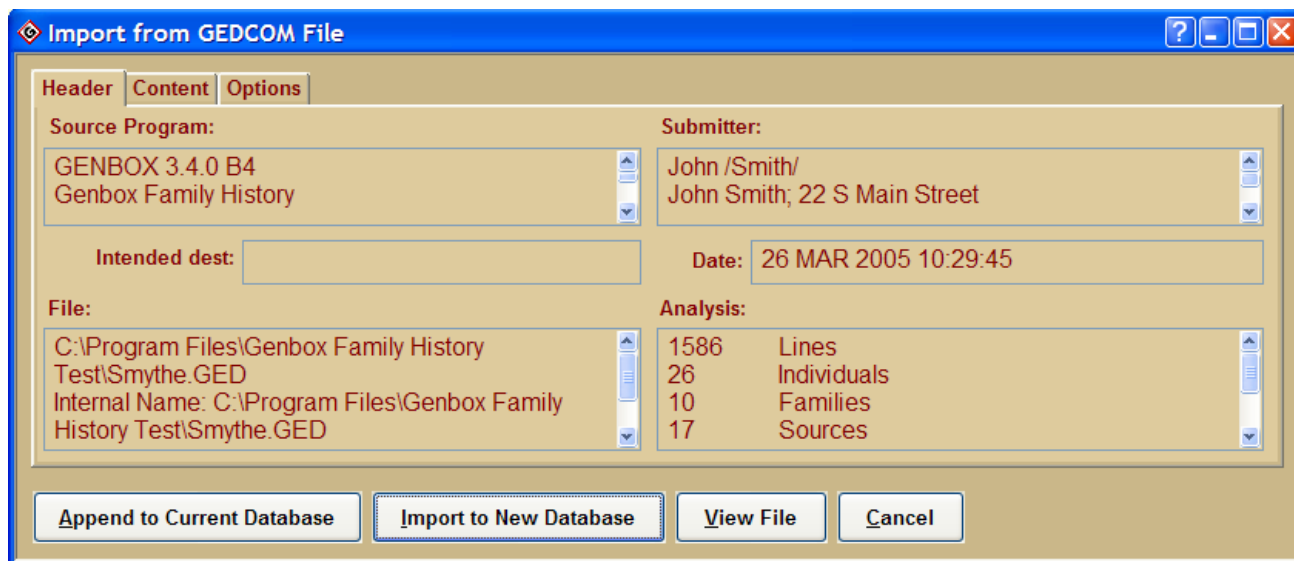
After you import a GEDCOM file, you may notice certain characters in your data that did not appear to import correctly. These include accented characters and other special characters that are not part of the standard ANSI character set. In some cases, this problem is the result of the source program writing the data using the wrong *codepage*. For example, the source program may have written the GEDCOM using the Cyrillic codepage but the GEDCOM file states that the character set is ANSI. As a special conversion capability, Genbox can correct this type of error on input, provided you know the correct codepage value and the GEDCOM file is edited to indicate this value:

- Open the GEDCOM file in a text editor.
- Find the line near the top that begins with the tag "CHAR". Typically, it will indicate the ANSI character set, as in "CHAR ANSI".
- Change the value for the tag to the numeric codepage value. For example, the line should read "CHAR 1251" for Cyrillic.
- Save the GEDCOM file.
- Import normally.

Genbox will use the codepage value to convert all data on input. If the character problems appear worse rather than better, then either the codepage value specified was incorrect or the problem is unrelated to the codepage that was used by the source program.

Import File View: Header Page

The **Header** page displays information about the import file. All of the controls on this page are read-only.



The screenshot shows the 'Import from GEDCOM File' dialog box with the 'Header' tab selected. The dialog is divided into several sections:

- Source Program:** GENBOX 3.4.0 B4
Genbox Family History
- Submitter:** John /Smith/
John Smith; 22 S Main Street
- Intended dest:** (empty text box)
- Date:** 26 MAR 2005 10:29:45
- File:** C:\Program Files\Genbox Family History
Test\Smythe.GED
Internal Name: C:\Program Files\Genbox Family
History Test\Smythe.GED
- Analysis:**

1586	Lines
26	Individuals
10	Families
17	Sources

At the bottom of the dialog are four buttons: 'Append to Current Database', 'Import to New Database', 'View File', and 'Cancel'.

Source Program

The **Source program** box displays information about the genealogy program that exported the file. It includes the program name and version, company, and address.

Submitter

The **Submitter** box displays information about the researcher who created the GEDCOM file. It includes the researcher's name and address.

Intended Destination

The **Intended destination** box displays the type of receiving system that the GEDCOM file was made for, if any.

Date

The **Date** box displays the date stored inside the file.

File Information

The **File information** box shows the full path name to the file, the internal name of the file, the character set used to encode the information, the GEDCOM file version, and the language of the data. It also shows any comments stored for the file.

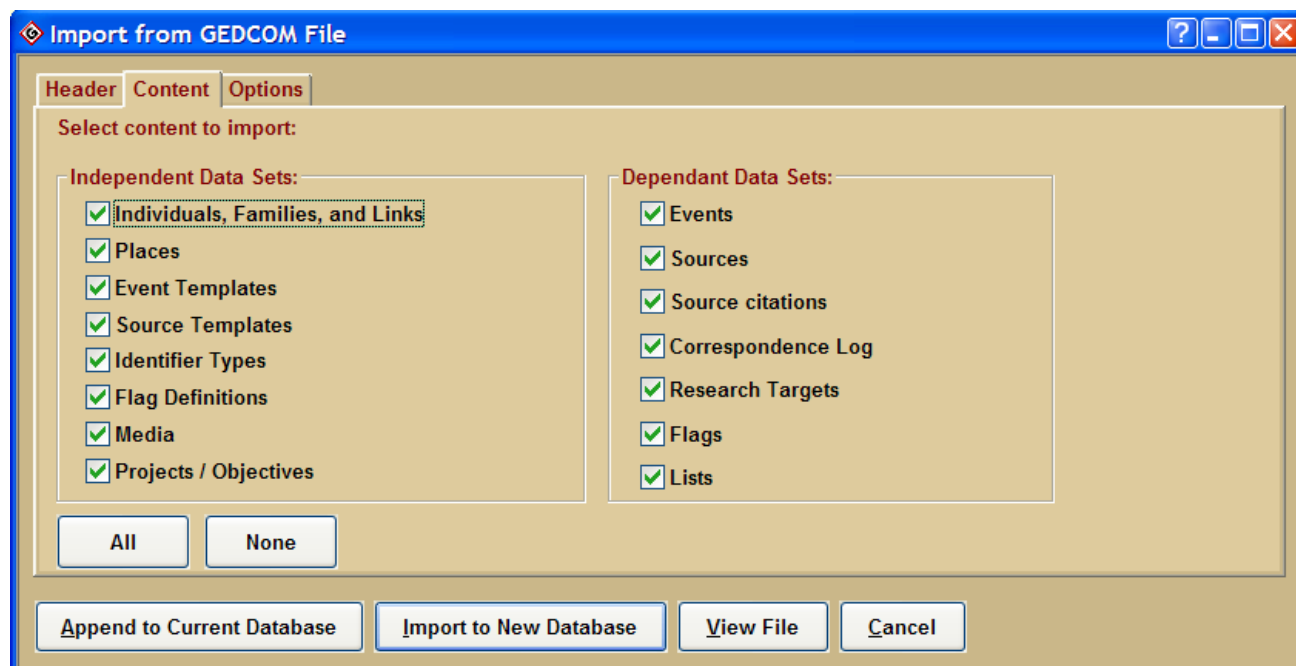
Analysis

The **Analysis** box displays the number of the elements for each of the following:

- Lines
- Individuals
- Families
- Sources
- Submitters

Import File View: Content Page

The **Content** page allows you to select which types of data will be imported. Normally, you would import all data types. Sometimes, however, you may find it useful to be able to import just certain data types. You may wish to import just the source types and event types from another database, for example.



The data sets are organized into two groups: **independent** data sets, and **dependent** data sets. The independent data sets can always be selected for importing, regardless of other content selections. The dependent data sets can only be imported when the other data sets that they depend on are being imported. Genbox will automatically disable and enable the dependent data set choices as appropriate.

The independent data sets are:

- Individuals, Families, and Links
- Places
- Event types
- Source types
- Flag definitions
- Media
- Projects / Objectives

The dependent data sets are:

- Events
- Sources
- Source citations
- Correspondence log
- Research targets
- Flags
- Lists

There are two buttons:

- Click **All** to select all check boxes.
- Click **None** to clear all check boxes.

Import File View: Options Page

The **Options** page provides a number of settings to control the import.

Import from GEDCOM File

Header Content **Options**

Duplicates Processing:

Event Templates: ☐ Keep old ☐ Replace old ☒ Merge (overwrite)

Source Templates: ☐ Keep old ☐ Replace old ☒ Merge (overwrite)

Individual Identifiers:

☐ Retain original ID numbers

☐ Replace underlines with spaces

Notes:

☐ Retain hard line breaks

Log File:

Unknown tag: ☒ Warn once ☐ Warn on all

Unsupported tag in context: ☒ Warn once ☐ Warn on all

Append to Current Database Import to New Database View File Cancel

Duplicates Processing

Event Templates and Source Templates

The Event Templates table and the Source Templates table do not hold genealogical information; they are supporting tables that often have the same records across databases. When importing a file into an existing database, you have some options for handling the likely duplication of records (records that have the same key field values):

- Keep old
- Replace old
- Merge

If you don't want any of your existing records to be changed, choose **Keep old**. If instead you are interested to see if the incoming file has any custom modifications to the templates, choose **Replace old**. As a third choice, you can choose **Merge**, in which case the data from both records will be combined; any blank data values in the existing record will be filled with new values. Non-blank values in the existing record will be retained. This means if you have any customized templates, the "Merge" option is still safe to use.

For all choices, imported template records which have new key field values will always be added to the tables.

Media Records

When imported media records have the same filename and reference name as an existing media record, **Keep old** processing will apply: the imported record will be skipped.

Project Objectives

When imported project objectives records have the same name and parent objective as an existing project objective, **Keep old** processing will also apply: the imported record will be skipped.

Places

Imported places that match existing place names will automatically be merged.

Other Record Types

Imported records of other types (individuals, families, events, sources, etc.) will not be checked for duplicates. After importing, you should carefully review the data to determine if any imported individuals are a good match with other individual records. Then, you can choose Merge for the Data menu to merge them together. The [Match Finder](#) tool can also be used to find individual merge candidates.

Retain Original ID Numbers

By default, individuals are assigned new ID numbers when they are imported. Click the **Retain original ID numbers** check box if you want to keep the old ID values. The system will then use the original IDs, except when there is an existing Individual record with the same ID; in that case, a new ID value will be assigned.

Replace Underlines with Spaces

GEDCOM files originating from older systems may have used underlines instead of spaces in name identifiers. Click the **Replace Underlines with Spaces** check box to have these automatically converted to space characters.

Retain Hard Line Breaks in Note Text

Some GEDCOM files incorrectly specify hard line breaks between every line in note text. Genbox takes out hard line breaks by default, so that the note text can be formatted to the correct width on reports. If you want to see the notes with the line breaks indicated, click the **Retain hard line breaks in note text** check box.

Log File Warnings

When an import is performed, a log file is created that keeps a record of cautions and warnings for specific imported data items. For a large GEDCOM file, a large number of warnings can be generated. In particular, the **Unknown tag** and **Unsupported tag in context** warnings can be numerous, which would make it harder to find other warnings within the log file. You have a choice for handling these types of warnings:

- Warn once
- Warn on all

When **Warn once** is chosen, the warning message will only appear for the **first** data item with the problem. Subsequent warnings for the same situation will be omitted.

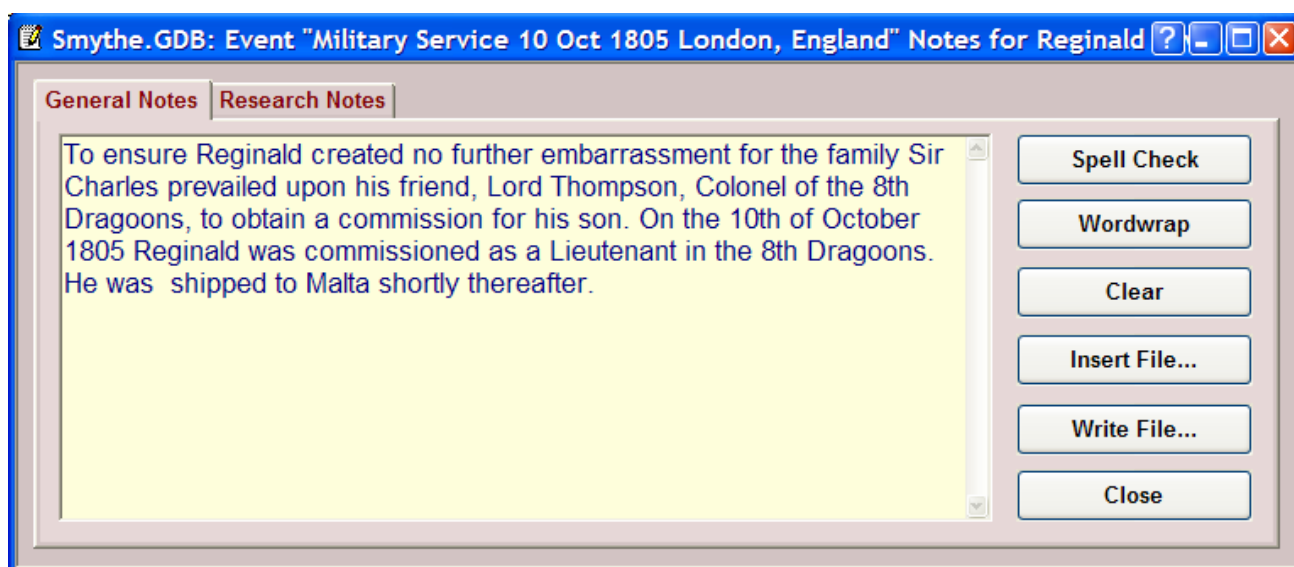
Magnify Notes View

The **Magnify Notes View**, also known as the **Notes View**, presents the contents of the notes fields on the current view page in a larger window. You can size this window to be as large as you like. A separate page is shown for each note type. A number of function buttons appear along the right side.

- To open a **Magnify Notes View** for the current notes field, press F5 or choose "Magnify Notes" from either the right-click context menu or the Select Menu.

The Magnify Notes View is *modeless*. This means you can freely move between the Notes View and other views, entering and modifying text. Your changes will be saved automatically.

You can click **Close** to close the Magnify Notes View when you are done with the current notes, or you can leave the view open where it will be reused when F5 is pressed in another notes box. If you want instead to have multiple Notes Views open at the same time, press SHIFT+F5 to open the second Notes View. That allows you to compare text and easily cut and paste between them.



A number of function buttons are available on the Magnify Notes View:

Spell Check

Click the **Spell Check** button to open the [Spell Checker Tool](#) which will check the spelling of words in the note text.

Wordwrap

Click the **Wordwrap** button to remove the "hard" carriage return/line feed characters in the current selection or the entire note.

Clear

Click the **Clear** button to delete all of the text in the note.

Insert File...

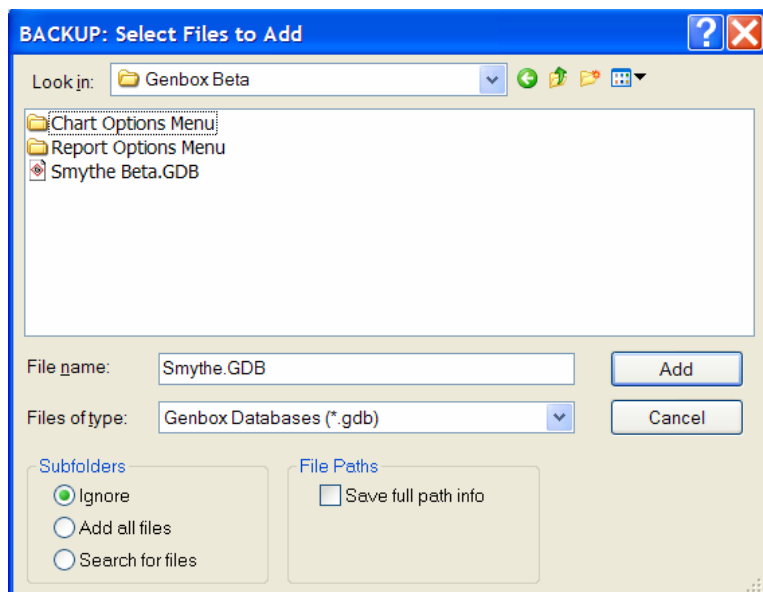
When the **Insert File...** button is clicked, the File Open Dialog will appear. Select the name of a file that contains plain text you would like to insert at the current text position.

Write File...

When the **Write File...** button is clicked, the File Open Dialog will appear. Enter the name of a file that will be written the current selection or the entire contents of the notes box. You can output the text either in plain ASCII format or as rich text (RTF).

Backup Select Files Dialog

The **Backup Select Files Dialog** is selected from the **File** menu by clicking **Backup**. It is used to select files for backup. It is based on the [Open File Dialog](#). You may wish to change some of the backup options before performing the operation.



- To back up files, type the file path or browse to the location of the file.
- Click **Add**.
- The [Save File Dialog](#) will appear. Specify a filename and path for the backup file.
- Click **Save**.

Subfolders

If you have organized your data files into subdirectories, you can easily back up all your files. The **Subfolders** option has the following choices:

- Ignore
- Add all files
- Search for files

When **Ignore** is chosen, only the files matching the file path entered are included in the backup.

When **Add all files** is chosen, all files in all subdirectories of the specified path are automatically included. For example, if you type in "c:\Mydata\mymain.GDB", and there is a subdirectory called "OldData" with a file named "Robin.GDB" and another subdirectory called "Chart Options" with a file named "Robchart.GCO", both of these files (and all the rest of the content in the subdirectories) would be backed up as well as mymain.GDB in the top-level directory.

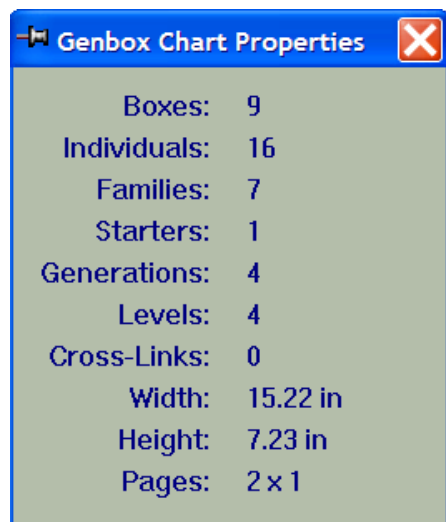
When **Search for files** is chosen, only those files matching the specified name are included. For example, if you type "c:\mydata\Rob*" using the asterisk wildcard, a file named "Robin.GDB" in the "OldData" subdirectory and another one named "Robchart.GCO" in the "Chart Options" subdirectory would be included, but a file named "Pennychart.GCO" in the "Chart Options" subdirectory and the file "Mymain.GDB" would not be included.

File Paths

Click **Save full path info** if you want the full directory path to be stored with each file. If selected, the **Restore** operation will be able to restore files directly to the subdirectories where they were. Otherwise, the **Restore** operation will restore all the files to the current directory.

Chart Properties Dialog

The **Chart Properties Dialog** appears when **Chart Properties** is selected from the [Chart Popup Menu](#).

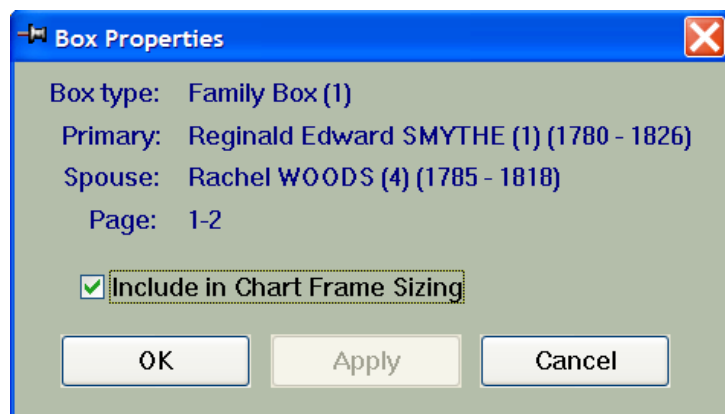


This menu option is available when you right-click anywhere in the open area on the chart. The dialog displays properties about the current chart:

- Number of boxes
- Number of individuals
- Number of families
- Number of starting individuals (keys)
- Number of generations
- Number of levels (if "strict generational alignment" is selected and "stagger leaves" is not selected, the number of levels will be the same as the number of generations)
- Number of cross-links
- Width of chart, in inches or millimeters
- Height of chart, in inches or millimeters
- Number of pages, in the horizontal and vertical directions.

Chart Box Properties Dialog

The **Chart Box Properties Dialog** appears when **Box Properties** is selected from the [Chart Popup Menu](#). This menu option is available when you right-click on a box on the chart.



The dialog displays properties about the current chart object:

- Box type (Family box, Individual box, Picture box, Title box, Legend box, Draw Object, Annotation)
- Primary individual name, ID, and date range (not all boxes have a primary individual)
- Spouse name, ID, and date range of spouse in box, if any
- Page(s) that the box appears on
- Checkbox: "Include in Chart Frame Sizing"

To more easily see box properties for several boxes, click the image of a push pin to "pin" the dialog to the window. Then click on each box you want to see properties for. The dialog will be updated automatically.

Include in Chart Frame Sizing Checkbox

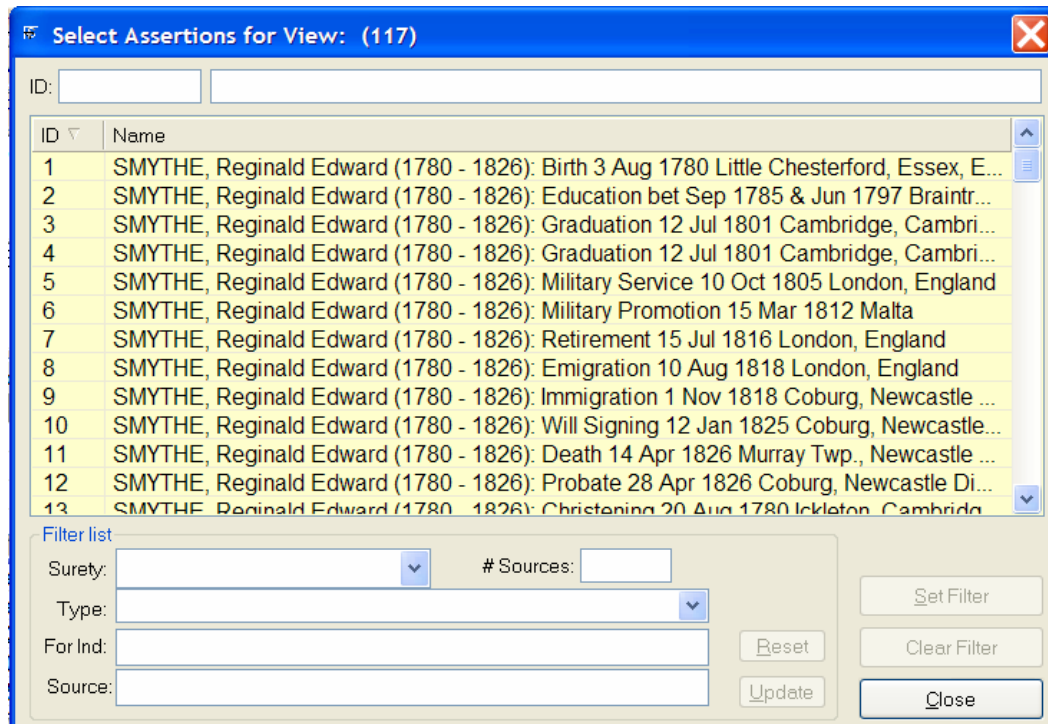
Boxes and objects on a chart can be either inside or outside the optional chart frame. Often, the Title Box will be above the chart frame, and the Legend Box will be below, with the Individual and Family boxes inside the frame. The default setting for added pictures, freehand lines, and annotations is outside the chart frame.

You can view and change the default setting for a chart object with the **Include in Chart Frame Sizing** checkbox. When checked, the position and size of the chart object will be considered by the program when sizing and positioning the chart frame. When the chart object is moved or resized, the chart frame will automatically be adjusted so that the frame continues to surround the object. The chart margin setting will also be respected, keeping the chart frame at the specified distance from its contents. Boxes marked "outside" the chart frame will be completely ignored when drawing the frame; this means the frame might be overlapped. This effect might be desired, as when a freehand arrow is drawn from outside the frame, across the frame and pointing at a box inside. Other times, you may need to manually drag the overlapping "outside" boxes to get them out of the way of a newly resized chart frame.

To change the setting for a chart object, check or clear the checkbox, then click the "OK" button or the "Apply" button. The "OK" button will also close the dialog window, unless the push pin has been pinned.

Citations Pick Dialog

The **Citations Pick Dialog** is used to select citation records.



ID	Name
1	SMYTHE, Reginald Edward (1780 - 1826): Birth 3 Aug 1780 Little Chesterford, Essex, E...
2	SMYTHE, Reginald Edward (1780 - 1826): Education bet Sep 1785 & Jun 1797 Braintr...
3	SMYTHE, Reginald Edward (1780 - 1826): Graduation 12 Jul 1801 Cambridge, Cambri...
4	SMYTHE, Reginald Edward (1780 - 1826): Graduation 12 Jul 1801 Cambridge, Cambri...
5	SMYTHE, Reginald Edward (1780 - 1826): Military Service 10 Oct 1805 London, England
6	SMYTHE, Reginald Edward (1780 - 1826): Military Promotion 15 Mar 1812 Malta
7	SMYTHE, Reginald Edward (1780 - 1826): Retirement 15 Jul 1816 London, England
8	SMYTHE, Reginald Edward (1780 - 1826): Emigration 10 Aug 1818 London, England
9	SMYTHE, Reginald Edward (1780 - 1826): Immigration 1 Nov 1818 Coburg, Newcastle ...
10	SMYTHE, Reginald Edward (1780 - 1826): Will Signing 12 Jan 1825 Coburg, Newcastle...
11	SMYTHE, Reginald Edward (1780 - 1826): Death 14 Apr 1826 Murray Twp., Newcastle ...
12	SMYTHE, Reginald Edward (1780 - 1826): Probate 28 Apr 1826 Coburg, Newcastle Di...
13	SMYTHE, Reginald Edward (1780 - 1826): Christening 20 Aug 1780 Ickleton, Cambridg...

ID

If you know the ID of the citation, type it into the **ID** box. The citation record with that ID will be shown automatically.

Name

Type the name of the citation in the **Name** box. You can type a full citation name or just the first part. All citation names that begin with the portion you typed will be displayed automatically.

List Box

The list box has two columns: Citation ID and Name. Double-click on a row to select that citation.

Filter List

The citation displayed in the list box can be filtered according to a number of data values:

- Surety level
- Citation data type
- Individual
- Source
- Number of sources

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

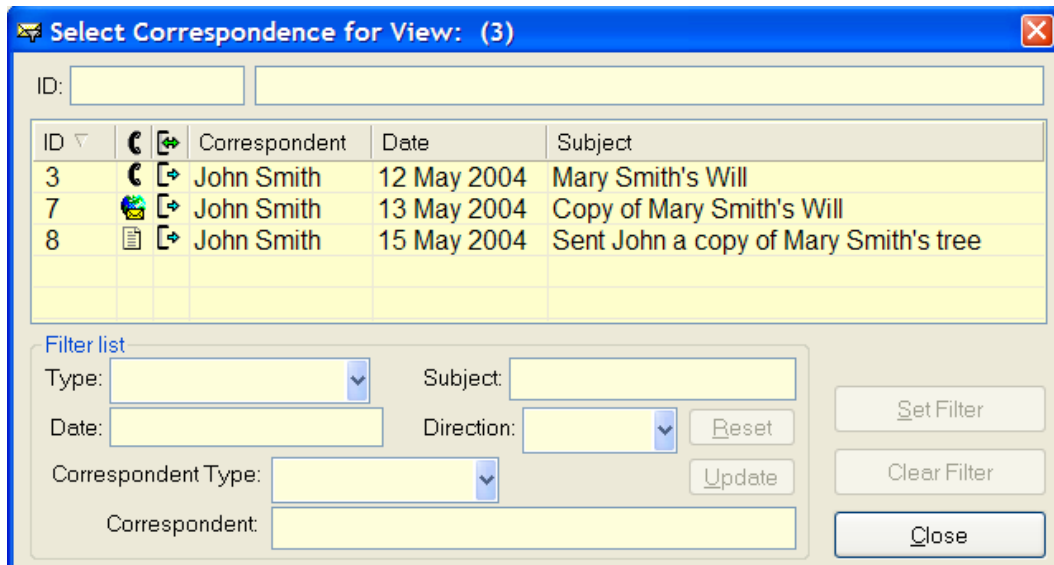
When the Citations Pick dialog is used to filter citation on the Citations View, click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The citation records shown on the Citations View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Citations View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of citation records will be shown on the Citations View and will be reachable with the record movement buttons.

Correspondence Pick Dialog

The **Correspondence Pick Dialog** is used to select correspondence log records.



Select Correspondence for View: (3)

ID:

ID	Type	Direction	Correspondent	Date	Subject
3			John Smith	12 May 2004	Mary Smith's Will
7			John Smith	13 May 2004	Copy of Mary Smith's Will
8			John Smith	15 May 2004	Sent John a copy of Mary Smith's tree

Filter list

Type: Subject:

Date: Direction:

Correspondent Type:

Correspondent:

ID

If you know the ID of the correspondence, type it into the **ID** box. The correspondence log record with that correspondence log ID will be shown automatically.

Name

Type the name of the correspondence log record in the **Name** box. You can type a full name or just the first part. All correspondence log records with names that begin with the portion you typed will be displayed automatically.

List Box

The list box has six columns: Correspondence Log ID, Type, Direction, Correspondent, Date, and Subject. Double-click on a row to select that correspondence log.

To sort on a column, click its header. A second click on the same column header will show the reverse sort. A triangle will indicate the current sort column and direction of sort; the triangle will point in the direction of increasing values.

Filter List

The correspondence records displayed in the list box can be filtered according to a number of data values:

- Type
- Date
- Subject
- Direction
- Correspondent

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

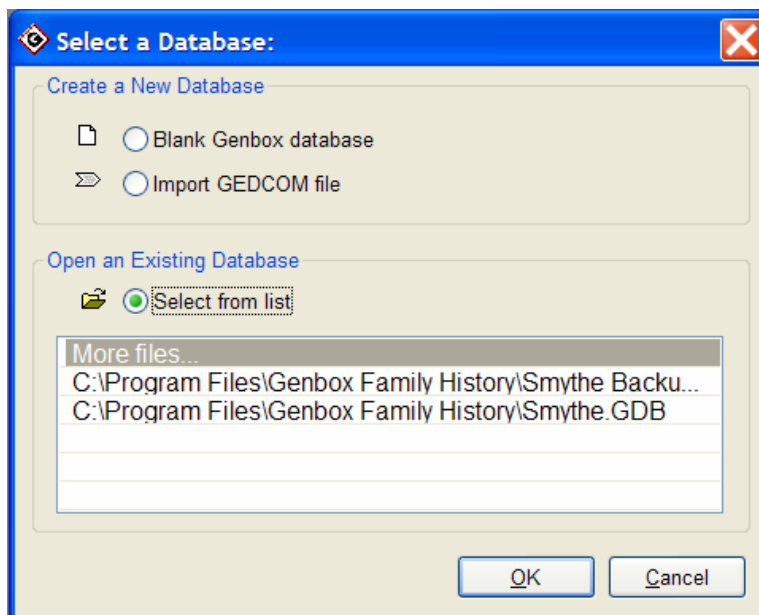
When the Correspondence Pick dialog is used to filter correspondence log on the [Correspondence View](#), click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The correspondence log records shown on the Correspondence View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Correspondence View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of correspondence log records will be shown on the Correspondence View and will be reachable with the record movement buttons.

Database Pick Dialog


The **Database Pick Dialog** presents choices for selecting a Genbox database:



- Create a new, blank database
- Create a new database by importing a GEDCOM file
- Open an existing Genbox database by selecting it from the displayed list of recently opened databases
- Browse for a database by choosing the "More files..." option.

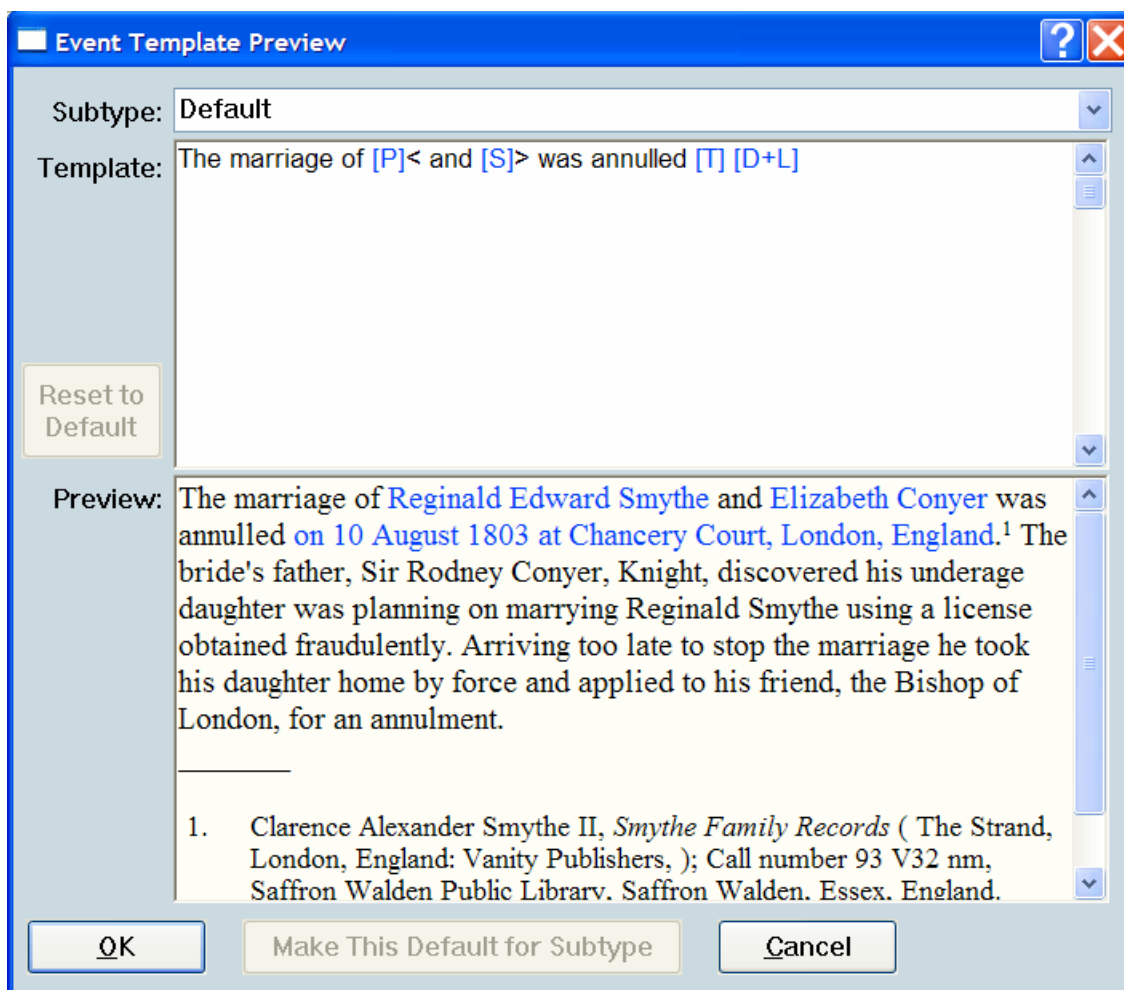
This dialog will appear when Genbox is first run, and when preferences have been set not to open the last opened database on startup.

Event Template Preview Dialog

The **Event Template Preview Dialog** is opened by clicking the **Magnify** button  next to the Template box on the [Individuals View: Events page](#), or by pressing F5 or selecting "Magnify Event Sentence" from the right-click context menu or the Select Menu. You can use it to enter, modify, and test your event template and see how your event data will look formatted on a report, complete with footnotes. You can also modify and add to the default event subtype templates stored in the Event Types record for the current event type.

The preview text is formatted according to the [Report Options File for Preview Dialogs](#), defined on the [Operation Page](#) of Preferences. This also controls the footnotes. You can create a report that suits your "preview" needs, then save the options file and use that file in your preferences setting.

The templates and formatted result are both shown for the currently selected output language.



The dialog box titled "Event Template Preview" has a blue title bar with a question mark and close button. It contains two main sections: "Template" and "Preview".

Template Section:

- Subtype:** A dropdown menu showing "Default".
- Template:** A text box containing the template: "The marriage of [P]< and [S]> was annulled [T] [D+L]".
- Reset to Default:** A button to the left of the template text box.

Preview Section:

- Preview:** A text box showing the formatted result: "The marriage of **Reginald Edward Smythe** and **Elizabeth Conyer** was annulled on **10 August 1803** at **Chancery Court, London, England**.¹ The bride's father, Sir Rodney Conyer, Knight, discovered his underage daughter was planning on marrying Reginald Smythe using a license obtained fraudulently. Arriving too late to stop the marriage he took his daughter home by force and applied to his friend, the Bishop of London, for an annulment.
- Footnote:** A list box containing one footnote: "1. Clarence Alexander Smythe II, *Smythe Family Records* (The Strand, London, England: Vanity Publishers,); Call number 93 V32 nm, Saffron Walden Public Librarv. Saffron Walden. Essex. England."

Buttons: At the bottom are three buttons: "OK", "Make This Default for Subtype", and "Cancel".

Event Subtype Selector

The **Event Subtype Selector** provides a choice between the defined subtypes for the current event type. Each subtype has a predefined template, which will appear in the Template Box when selected.

The full set of subtypes defined for the current event tag are included on the drop-down list. Subtypes that do not have templates defined in the current output language family will appear on the drop-down list in the "secondary data" font style.

Template Box

The **Template** box displays the template. Changes that you make to the template will be immediately reflected in the **Preview** box.

Preview Box

The **Preview** box shows you how the event data will look formatted on reports, according to the template in the **Template** box. The **Preview** box is read-only.

Reset to Default Button

Click **Reset to Default** to restore the template to the default for the current event subtype.

Make This Default for Subtype Button

Click **Make This Default for Subtype** to make the template the new default for the current event subtype. This button provides an easy way to update the default templates for event types without opening the [Event Types View](#).

Make This New Subtype Button

A new subtype choice for the current event type can be created as follows:

- Enter the desired name for the new subtype into the **Event Subtype Selector** box.
- Modify the template as appropriate.
- Click the **Make This New Subtype** button.

This button provides an easy way to add more subtype templates for the current event type without needing to open the [Event Types View](#).

Event Witness Template Preview Dialog

The **Event Witness Template Preview Dialog** is opened by clicking in the "T" column of the **Witness** list for a witness on the [Individuals View: Events page](#). You can use it to test and update the event witness template for the selected witness and see how your event witness data will look formatted on a report. You can also modify or add to the roles defined for an event type without needing to open the Event Types View.

The preview text is formatted according to the [Report Options File for Preview Dialogs](#), defined on the [Operation Page](#) of Preferences. This also controls the footnotes. You can create a report that suits your "preview" needs, then save the options file and use that file in your preferences setting.

The role names, templates, and formatted result are all shown for the currently selected output language.

Witnessed Event Template Preview

Witness: Lord THOMPSON

Role: [dropdown]

Template: [W] <witnessed|was the [WR] at> [WE]

Reset

Preview: Lord Thompson witnessed the beginning of military service of Reginald Edward Smythe on 10 October 1805 in London, England.¹

1. Ministry of Defense, Great Britain, *Service of Officers Retired on Full and Half Pay, 1828* (Public Record Office, Kew, England.,), Page 52, Public Record Office, Kew, England. Records are not indexed. Use of a professional researcher is required.

OK Make This Default for Role Cancel

Witness

The **Witness** box displays the name and ID of the selected witness. This box is read-only.

Role Selector Box

The **Role Selector** box displays the roles defined for the current event type. You can choose one of the predefined roles for the current event type from the drop-down list.

The full set of roles defined for the current event tag are included on the drop-down list. Roles that do not have templates defined in the current output language family will appear on the drop-down list in the "secondary data" font style.

Role Text Box

The **Role Text** box displays the role name currently selected or entered for the witness. You can type in your own custom role name here.

Template Box

The **Template** box displays the witness template. Changes that you make to the template will be immediately reflected in the **Preview** box.

Preview Box

The **Preview** box shows you how the event witness data will look formatted on reports, according to the template in the **Template** box. The **Preview** box is read-only.

Reset Button

Click **Reset** to restore the witness template for the current witness to the default template for the current event type and role.

Make This Default for Role Button

Click **Make This Default for Role** to make the template the new default for the current role. This button provides an easy way to update the default templates for roles without needing to open the [Event Types View](#).

Make New Role Template Button

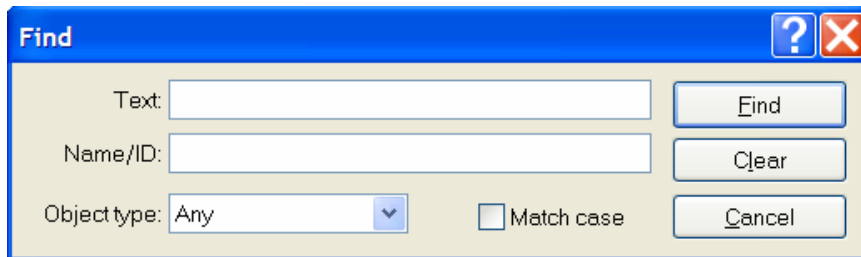
A new role template for the current event type can be created as follows:

- Enter the desired name for the new role into the **Role Selector** box.
- Modify the template as appropriate.
- Click the **Make New Role Template** button.

This button provides an easy way to add more role templates for the current event type without needing to open the [Event Types View](#).

Find Dialog

The **Find Dialog** appears when **Find** is selected from the [Chart Popup Menu](#). This dialog allows you to find data on the chart.



Text Box

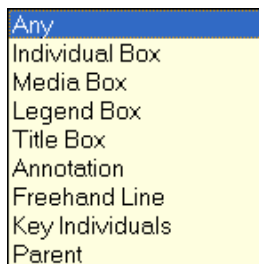
Enter the text you want to search for in the **Text** box.

Name/ID Box

Enter the Individual name or ID that you want to search for in the **Name/ID** box.

Object Type

Select the type of chart objects you want to search:



For many of these types, you don't need to specify any text for the search--the object type is enough. For **Parent**, select the child box before opening the Find dialog, and leave the other match fields blank.

Match Case

Click the **Match case** check box if you want to require that the upper and lower case letters you typed match exactly.

Find Button

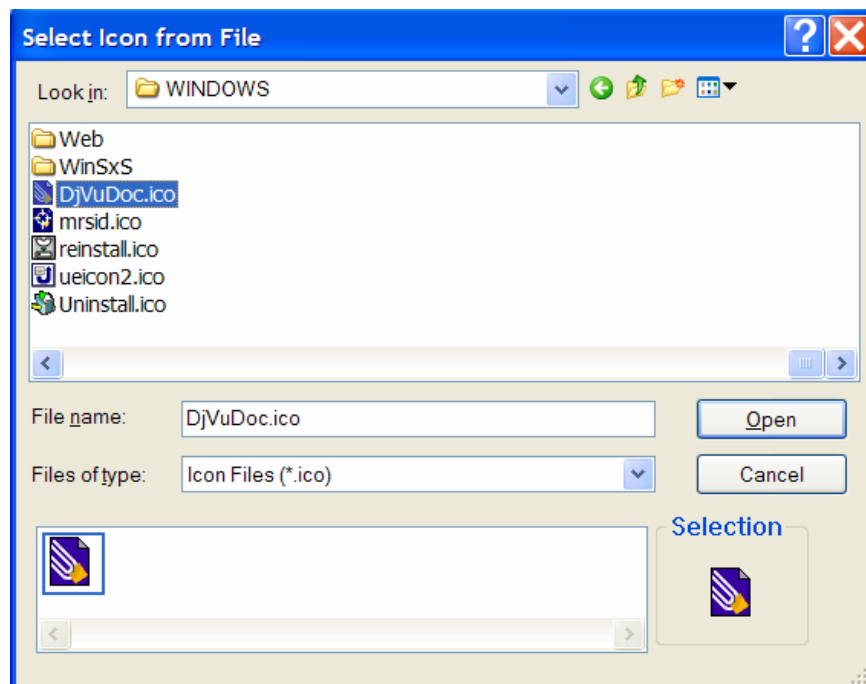
Click the **Find** button to begin the search. The first matching chart object will be selected, or the message "Match Not Found" will appear. To find the next matching chart object, you can press CTRL+G.

Clear Button

Click the **Clear** button to reset all match conditions to blank.

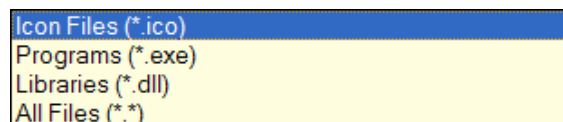
Icon Pick Dialog

The **Icon Pick Dialog** is used to select icons for the [Chart Options View: Contents page](#). This dialog is like the [Open File Dialog](#), with the addition of a display of the icons. Choose a file that contains icons, pick an icon from the file, then click **Open**.



File Types

Besides separate files, icons can also be found in programs and libraries. The **Files of type** box presents the following choices:



Icon List Box

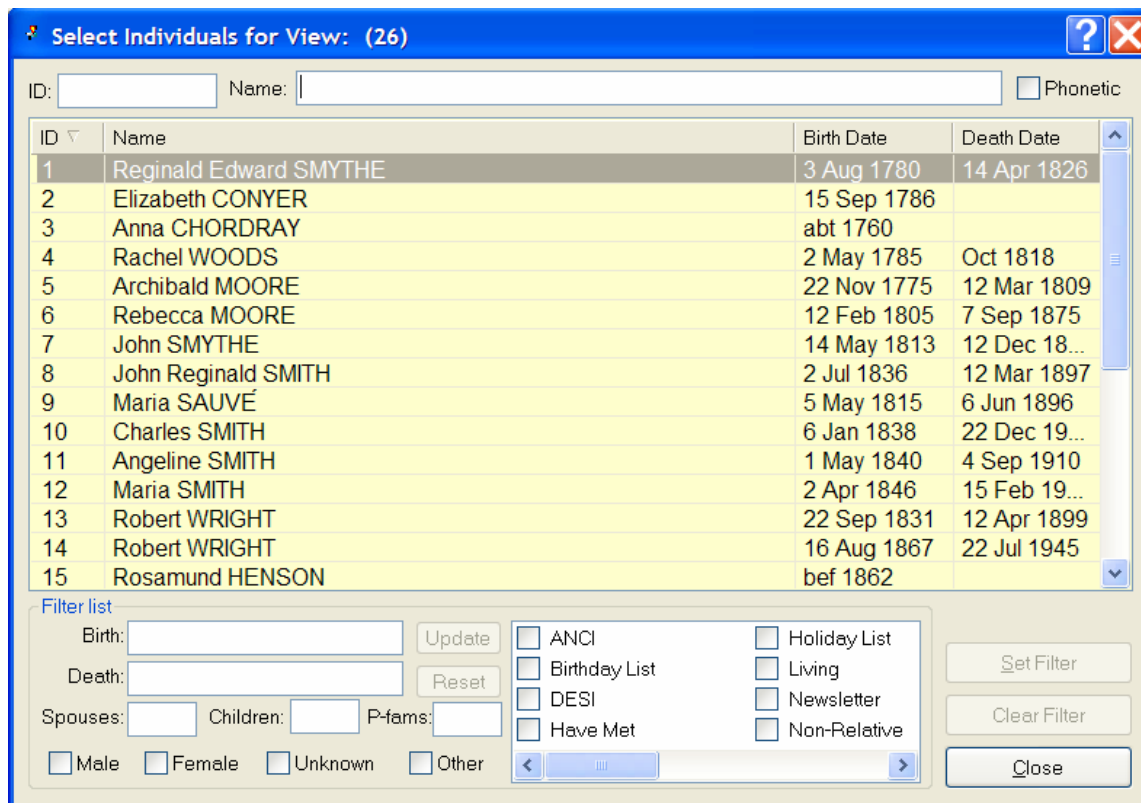
More than one icon can be found in some files. An image of each of the icons found in the currently selected file will appear in the **Icon List** box. The currently selected icon will have a box around it. To select a different icon, click it.

Icon Selection Box

The **Icon Selection** box displays the currently selected icon. This image is read-only. To select a different icon in the current file, click its image in the **Icon List** box.

Individuals Pick Dialog

The **Individuals Pick Dialog** is used to select individuals.



Select Individuals for View: (26)

ID: Name: ☐ Phonetic

ID	Name	Birth Date	Death Date
1	Reginald Edward SMYTHE	3 Aug 1780	14 Apr 1826
2	Elizabeth CONYER	15 Sep 1786	
3	Anna CHORDRAY	abt 1760	
4	Rachel WOODS	2 May 1785	Oct 1818
5	Archibald MOORE	22 Nov 1775	12 Mar 1809
6	Rebecca MOORE	12 Feb 1805	7 Sep 1875
7	John SMYTHE	14 May 1813	12 Dec 18...
8	John Reginald SMITH	2 Jul 1836	12 Mar 1897
9	Maria SAUVÉ	5 May 1815	6 Jun 1896
10	Charles SMITH	6 Jan 1838	22 Dec 19...
11	Angeline SMITH	1 May 1840	4 Sep 1910
12	Maria SMITH	2 Apr 1846	15 Feb 19...
13	Robert WRIGHT	22 Sep 1831	12 Apr 1899
14	Robert WRIGHT	16 Aug 1867	22 Jul 1945
15	Rosamund HENSON	bef 1862	

Filter list

Birth: Update ☐ ANCI ☐ Holiday List

Death: Reset ☐ Birthday List ☐ Living

Spouses: Children: P-fams: ☐ DESI ☐ Newsletter

☐ Male ☐ Female ☐ Unknown ☐ Other ☐ Have Met ☐ Non-Relative

Set Filter Clear Filter Close

Individual ID

If you know the ID of the individual you are searching for, enter it in the **Individual ID** box.

Search Box

To search by name, type the name of the individual in the **Search** box. You can type a full name or just the first part of the given name or surname or both. All individual names that begin with the portion you typed will be displayed automatically.

Ignore Diacritics

When **Ignore diacritics** is checked, characters with accents, such as é and â, will be treated the same as the corresponding characters without the accents.

Phonetic Match

When **Phonetic match** is checked, the phonetic equivalent of the typed name will be used in the search. Type the name normally. A phonetic search generally produces more matches than an exact spelling match.

List Box

The list box has four columns: Individual ID, Name, Birth Date, and Death Date. Double-click on a row to select that record.

The **Name** column displays the matching individual names. If the match was to an identifier or name variant that is not part of the preferred name, the matching name will be shown first, followed by a dash, then the preferred name. If the identifier type is of class prefix, suffix, or identifier, or if the identifier type has the "label" flag set, the identifier type will also be shown in parentheses. Nicknames will be shown in double quotes, and User ID values in brackets:

Rachel Moore - Rachel Woods
[M6543] - Margaret Lynn
Jr. (suffix title) - Frederick Smith
"Tom" - Thomas Smith

List Box Sorting

You can sort the names in the list box by clicking on the column headers: Individual ID, Name, Birth Date, or Death Date. A second click on the same column will reverse the sort. An arrow next to the column label will point in the direction of increasing values.

For the "Name" column, you can sort on either surname-first order or given-name-first order. The default sort order is by surname; clicking on the column header will cycle through surname ascending, surname descending, given name ascending, given name descending. The column header indicates the sort direction and sort type.

Filter List

The individuals displayed in the list box can be filtered according to a number of data values:

- Birth and Death dates
- Number of spouses
- Number of parent families
- Number of children
- Sex: male, female, and/or unknown
- Individual flags

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.


Set Filter Button

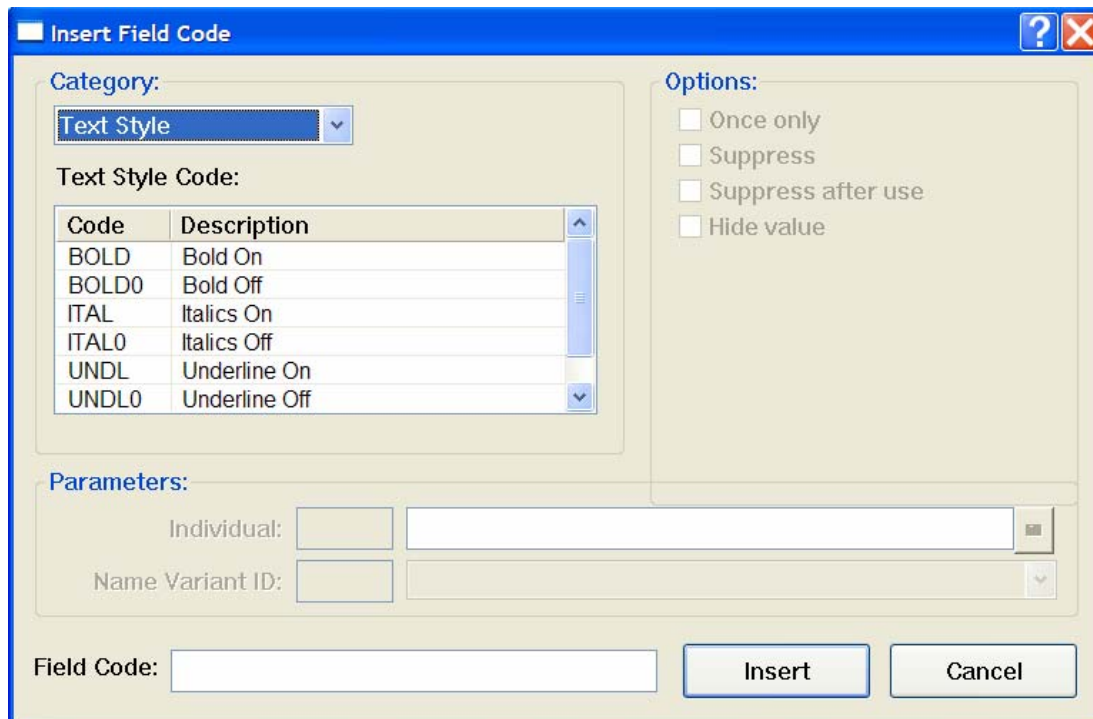
When the Individuals Pick dialog is used to filter individuals on the Individuals View, click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The individual records shown on the Individuals View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Individuals View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of individual records will be shown on the Individuals View and will be reachable with the record movement buttons.

Insert Field Code Dialog

The **Insert Field Code Dialog** is opened by clicking the **Insert Field Code** toolbar button  or by pressing **CTRL+D**. You can use it to insert new field codes or edit existing field codes in your event templates and note text.



Insert Field Code

Category:
Text Style

Text Style Code:

Code	Description
BOLD	Bold On
BOLD0	Bold Off
ITAL	Italics On
ITAL0	Italics Off
UNDL	Underline On
UNDL0	Underline Off

Options:

☐ Once only
☐ Suppress
☐ Suppress after use
☐ Hide value

Parameters:

Individual:

Name Variant ID:

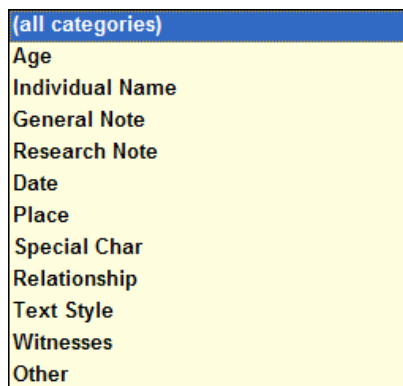
Field Code:

Insert **Cancel**

Category Selector

The **Category Selector** provides a choice between the defined categories of field codes. When a category is selected, the base codes defined for that category will appear in the Base Code List Box. The top of the pick list has the choice "(all categories)".

The categories that you can select from are:



(all categories)

Age
Individual Name
General Note
Research Note
Date
Place
Special Char
Relationship
Text Style
Witnesses
Other

When the dialog opens to add a new field code, the initial category displayed will be the one most recently used.

Base Code List Box

The **Base Code List Box** lists the base codes in the currently selected category. Click a base code to select it. Your selection will appear in the Field Code box.

Options

Most base codes support a number of **options**. The options supported will vary according to the currently selected base code.

Once Only

When **Once only** is checked, the field code will return a blank value if the data value it references has already appeared at least once in the current template.

Suppress

When **Suppress** is checked, the data value that would have been returned by the field code is treated as if it were blank. This affects following field codes that reference the same data value. A field code with the **Suppress** option should not be placed in a conditional group, because that condition would always fail.

Suppress After

When **Suppress after** is checked, the data value is treated as if it were blank, but only after showing the value. This option can be used to ensure the data value only appears once in the output.

Hide Value

When **Hide value** is checked, the field code is processed normally, except that the data value returned (if any) is not shown in the output. This option allows you to tailor your conditional template parts based on whether a data value is non-blank without needing to output the data value itself. While both **Hide value** and **Suppress** prevent the data value from being shown, a **Hide value** field code will still look at the data to see if it is non-blank, while a **Suppress** field code will behave as if it were blank.

Sentence Case

The **Sentence Case** pick list provides the following choices:

Nominative (default)
Possessive
Direct object
Indirect object
Reflexive

The choice of **Sentence case** influences which pronoun is used.

Name Shortened Forms

For individual names, you have a choice of the following formats:

- Initial full name
- Always full name
- Force pronoun
- Never pronoun

The default is **Initial full name**, which will show the full name on first reference to the individual, then use just the given name or a pronoun if this is a subsequent reference.

Filter

The **filter** options will cause the field code to return a blank value if the filter conditions are not met.

Sex

The **Sex** pick list provides the following choices for filtering on sex:

(disabled)
Male only
Female only
Unknown only
Other only


The sex filter options allow you to tailor templates according to the sex of the individual. This allows proper forms of surrounding words to be used.

When Focus Individual

For the [P1], [P2], [P3] base codes, check the **When focus individual** checkbox to cause the field code to show a value only when the selected principal is the focus individual. When used in a conditional group for an event general note, this option allows you to tailor the general text to be different for each principal in the event.

Parameters

Some of the base codes can use a **record ID value** to specify the specific data record to use. The type of ID varies according to base code: it can be the ID for an Individual, Individual Identifier, Place, Place Name, Event, or Source.

The type of ID expected is shown by the **label** in the **Parameters** section. The **ID box** allows you to type the ID number in directly, if known. Or, you can type the name of the data record in the **Name box**. Or, you can click on the **Filter button**  to open the pick dialog for the current data type.

When a data record has been selected, the **ID box** and **Name box** will display your selection.

For the Individual Name Variant Reference base code [N], the **Name Variant ID box** and **Name Variant Pick List** will be activated once an individual has been selected.

Field Code

The **Field code** box displays the complete field code, with all the currently selected options, filters, and parameters. You can edit this text directly if you wish.


Insert Button

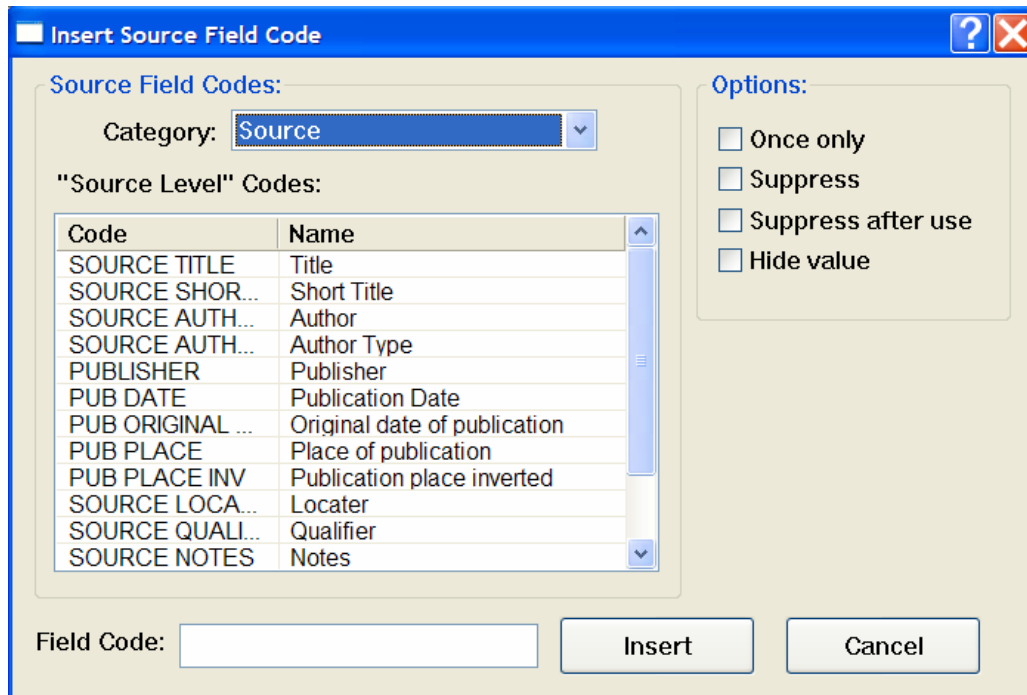
When The **Insert button** is pressed, the field code will be inserted into the note or template at the current text cursor position, and the dialog will close.

Cancel Button

When the **Cancel button** is pressed, the dialog will close without inserting a field code.

Insert Source Field Code Dialog

The **Insert Source Field Code Dialog** is opened by clicking the **Insert Field Code** toolbar button  or by pressing **CTRL+D**. You can use it to insert new field codes or edit existing field codes in your source templates. Before opening the dialog, position the text cursor at the position in your source template where you would like to add the new field code.



Source Field Codes:

Category: **Source**

"Source Level" Codes:

Code	Name
SOURCE TITLE	Title
SOURCE SHOR...	Short Title
SOURCE AUTH...	Author
SOURCE AUTH...	Author Type
PUBLISHER	Publisher
PUB DATE	Publication Date
PUB ORIGINAL ...	Original date of publication
PUB PLACE	Place of publication
PUB PLACE INV	Publication place inverted
SOURCE LOCA...	Locater
SOURCE QUALI...	Qualifier
SOURCE NOTES	Notes

Options:

☐ Once only

☐ Suppress

☐ Suppress after use

☐ Hide value

Field Code:

Insert **Cancel**

Category Selector

The **Category Selector** provides a choice between the defined categories of field codes. When a category is selected, the base codes defined for that category will appear in the Base Code List Box. The top of the pick list has the choice "(all categories)".

The categories that you can select from are:



(all categories)

Source

Document

Citation

Repository

Special Char

Text Style

Other

When the dialog opens to add a new field code, the initial category displayed will be the one most recently used.

Base Code List Box

The **Base Code List Box** lists the base codes in the currently selected category. Click a base code to select it. Your selection will appear in the Field Code box.

Options

Most base codes support a number of **options**. The options supported will vary according to the currently selected base code.

Once Only

When **Once only** is checked, the field code will return a blank value if the data value it references has already appeared at least once in the current template.

Suppress

When **Suppress** is checked, the data value that would have been returned by the field code is treated as if it were blank. This affects following field codes that reference the same data value. A field code with the **Suppress** option should not be placed in a conditional group, because that condition would always fail.

Suppress After

When **Suppress after** is checked, the data value is treated as if it were blank, but only after showing the value. This option can be used to ensure the data value only appears once in the output.

Hide Value

When **Hide value** is checked, the field code is processed normally, except that the data value returned (if any) is not shown in the output. This option allows you to tailor your conditional template parts based on whether a data value is non-blank without needing to output the data value itself. While both **Hide value** and **Suppress** prevent the data value from being shown, a **Hide value** field code will still look at the data to see if it is non-blank, while a **Suppress** field code will behave as if it were blank.

Field Code

The **Field code** box displays the complete field code, with all the currently selected options. You can edit this text directly if you wish.


Insert Button

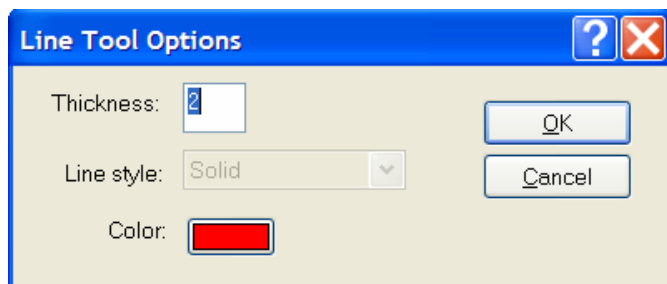
When The **Insert button** is pressed, the field code will be inserted into the source template at the current text cursor position, and the dialog will close.

Cancel Button

When the **Cancel button** is pressed, the dialog will close without inserting a field code.

Line Tool Options Dialog

The **Line Tool Options Dialog** appears when the **Line Tool**  is double-clicked while viewing a chart or report. You can use it to change the properties of a selected line, and set options for new lines.

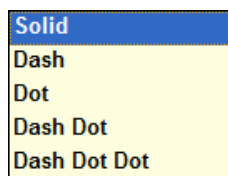


Thickness

Enter the thickness, in number of pixels.

Line Style

Select the **Line style**, from the drop-down list:



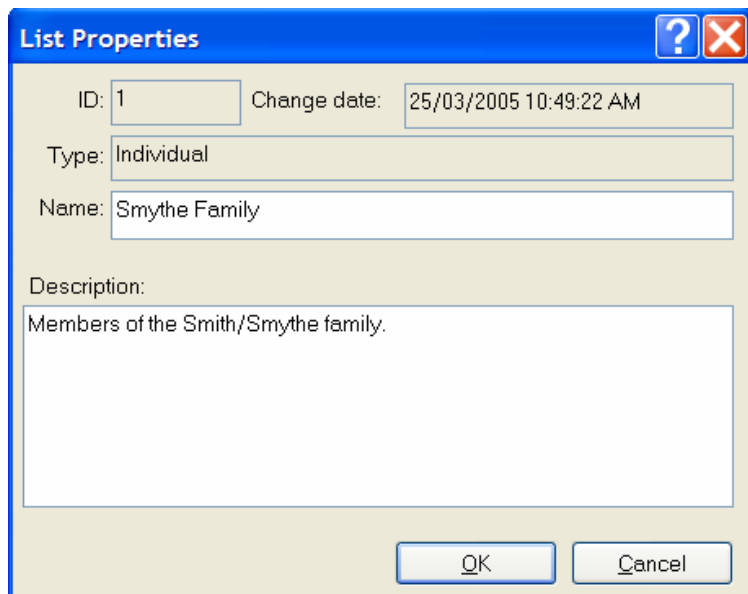
Note When **Thickness** is greater than 1, **Line style** must be Solid.

Color

Click on the **Color** button to open the [Select Color Dialog](#). Choose the new color from the dialog.

List Properties Dialog

The **List Properties Dialog** appears when Properties is selected from the popup menu for a list name on the [List View](#). It is used to display and enter properties of lists.



List Properties

ID: 1 Change date: 25/03/2005 10:49:22 AM

Type: Individual

Name: Smythe Family

Description:

Members of the Smith/Smythe family.

OK Cancel

ID

Each saved list has an ID, which is displayed in this box. This box is read-only.

Name

This box displays the name of the list. To rename the list, type the new name.

Change Date

This box displays the date the list was last modified. It is read-only.

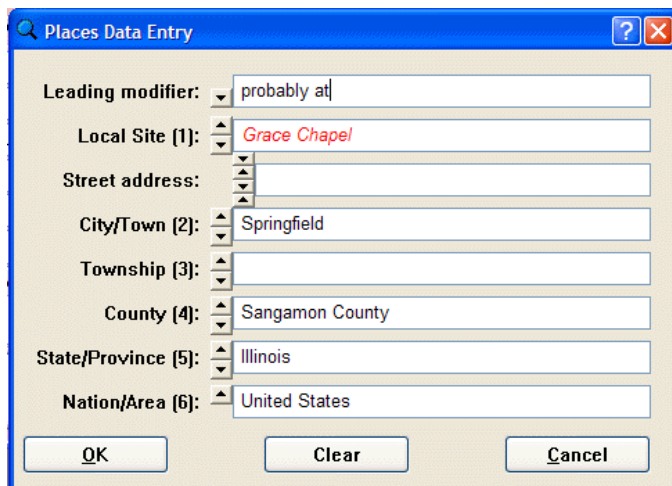
Description

Type your description of the list into the **Description** box.

Magnify Place Dialog

The **Magnify Place** dialog displays the place name for the current field, with names at each place level in a separate field. You can use the up/down arrow buttons to easily move place name parts either up or down the place level hierarchy. Names in a "new" position are shown in the "marked text" font. A place name that is already in the database is shown in the normal text font.

- **To open the Magnify Place Dialog**, first click in the Place field that contains the data of interest, then press F5 or select "Magnify Place" from the right-click context menu or the Select Menu. The Magnify Place Dialog will also be opened automatically when the preferences option "Confirm New Places" is checked and a new place name is entered.



In this example, "Grace Chapel" is shown highlighted, which indicates this is a new place name. The City of Springfield, and all higher levels shown, are displayed in the normal font, indicating these place names are already stored in the database.

Moving Name Parts Up or Down

Genbox will attempt to place new names into the correct levels. When this default assignment is incorrect, you can easily move a name part up or down by clicking on the arrows to the left of the field. There are no "push restrictions" in this dialog; if a place name is pushed to a box already containing a name, the old name will be pushed out and into the next text box.

There are three boxes that can accumulate name parts pushed into them: Leading modifier, Local Site, and Nation/Area. Each name in a multiple-name level will be separated by a comma.

Using the Street Address Box

In Genbox, the "street address" for a local site is considered a name variant of that local site. If the local site name is left blank, the street address becomes the primary name. Values entered into the street address box on this dialog will be marked "postal".

The indented set of up/down buttons allows you to handle movement to/from the street address box separately. When name parts are "pushed" from local site or city, they normally skip over the street address box. If you want to move a name into the street address box, use one of the indented arrow buttons.

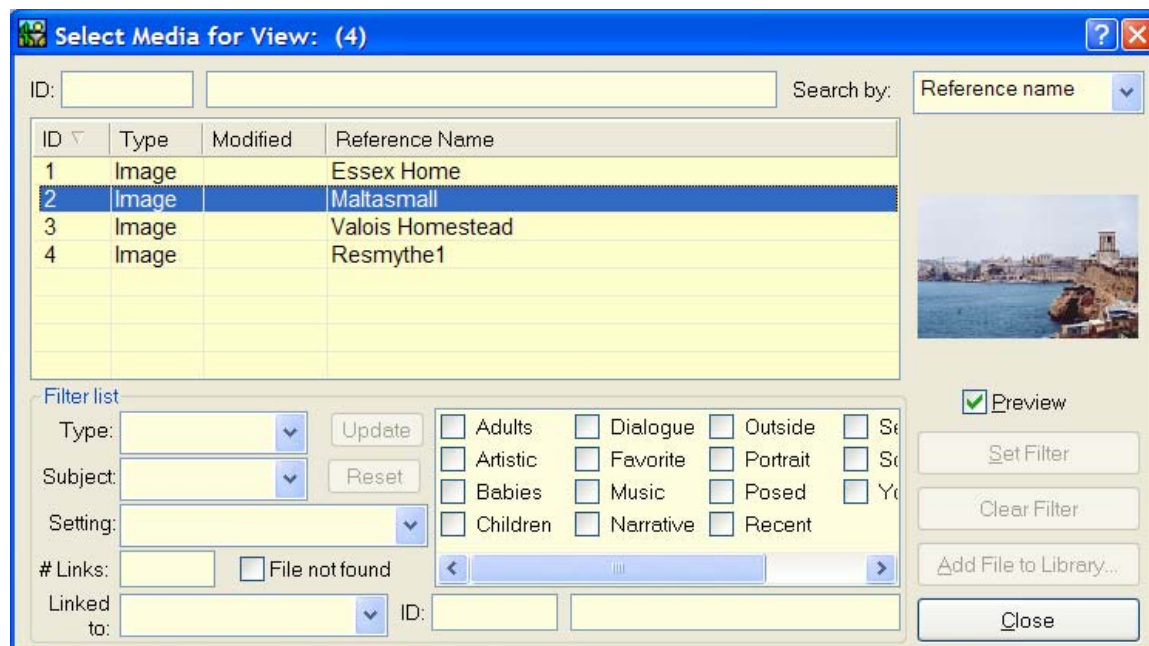
Entering a Leading Modifier

The **Leading Modifier** box can be used to enter a leading modifier for the place. If left blank, the leading modifier is determined by the event type and place level, and is usually "at" or "in". The leading modifier text should all be lowercase. Commas can be included.

Note the leading modifier text is stored in the event record, not in the Places database with the place name.

Media Pick Dialog

The **Media Pick Dialog** is used to select media records.



ID

If you know the ID of the media, type it into the **ID** box. The media record with that media ID will be shown automatically.

Search By

You can search for media by values in the following data fields:

Reference name
File name
Title
Caption
Description
Ext. Storage

The fourth column in the list box will change to reflect your selection.

Text Box

Depending on your choice for **Search by**, type the reference name, file name, title, caption, or description into the text box. You can type a full value or just the first part. All media records with values that begin with the portion you typed will be displayed automatically.

List Box

The list box has four columns: Media ID, Type, Last Modified, and a fourth column that is dependent on your choices for [Search by](#). Double-click on a row to select that media.

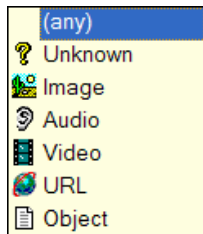
To sort on a column, click its header. A second click on the same column header will show the reverse sort. A triangle will indicate the current sort column and direction of sort; the triangle will point in the direction of increasing values.

Filter List

The media displayed in the list box can be filtered according to a number of data values:

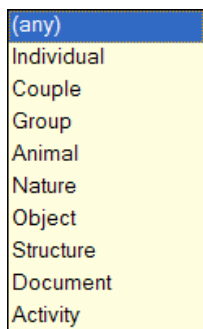
Filter by Media Type

Choices are:



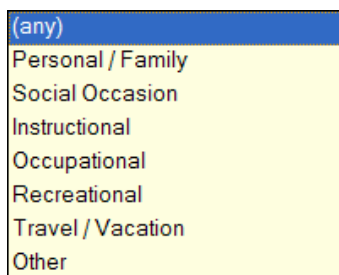
Filter by Media Subject

Choices are the same as on the media subject pick list on the Media Content Page:



Filter by Media Setting

Choices are the same as on the media settings pick list on the Media Content Page:



Filter by Number of Links

Enter the number of links required for a match. You can use comparative operators, such as "> 2".

Filter by File Not Found

When **File not found** is checked, the media list is filtered to those records where the file name contains an invalid path.

Filter by Linked Data Type

Choices for linked data type are:



If no data record ID is entered, then media will be restricted to any links of the specified data type.

For "Individual", links to summary, family, or event media for individuals will be included.

Filter by Linked Data Record ID

First choose the data type, then enter the ID or type the name of a data record that the media must be linked to. With this filter option, you can restrict the media list to just the media linked to a particular individual, for example.

The "Individual Families" data type will restrict the list to family media linked to the entered individual ID.

The "Individual Events" data type will restrict the list to event media linked to the entered individual ID.

The "Family" data type requires a Family ID to be entered.

The "Event" data type requires an Event ID to be entered.

Filter By Media Flags

Click any of the media flags to include them in the filter conditions.

Update Filter Button

After changing values in the filter group, click the **Update** button to update the list box.

Reset Filter Button

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

When the Media Pick dialog is used to filter media on the [Media View](#), click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The media records shown on the Media View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Media View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of media records will be shown on the Media View and will be reachable with the record movement buttons.


Add File to Library Button

If the media file you want to select does not have a record in the Media Table, click the **Add file to library** button. The Open File Dialog will appear. Select the file you want to add to the library and click **Open**. A new record in the Media Table will be created, and a new row will appear in the list box on the Media Pick Dialog.

Preview Check Box

Click the **Preview** check box to enable viewing of the media. The pictures will appear in the blank area above the check box.

Media Preview Dialog

The **Media Preview Dialog** appears when the **Play** button  next to a **Media** control displaying a picture is clicked, or when the Media control has the focus and F5 is pressed or "Magnify Media" is selected from the right-click context menu or the Select Menu. It shows the media in a larger window.







View Number

The Media Preview Dialog can display multiple pictures at once. Choices for viewing number are:

- One
- Six
- Twelve
- All

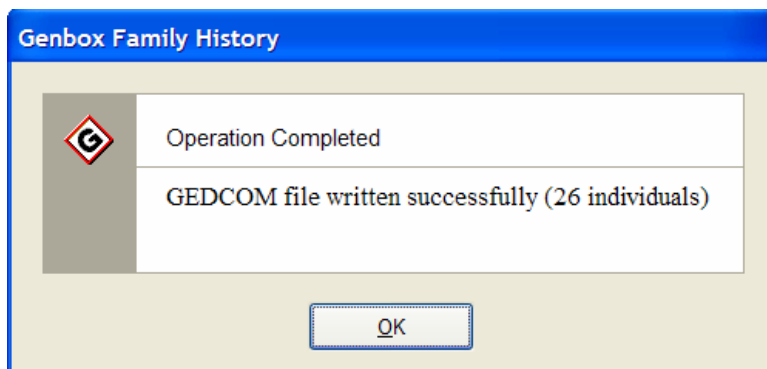
Media Control Buttons

There are four media control buttons beneath the image area: **Play**, **Previous**, **Next**, and **New**.

- The **Play** button will display a desert landscape  when the current media is a picture. Click this button to toggle the picture between maximum fit size and actual image size. Note: if the actual image size is as large or larger than the Media Preview window, no change will be observed.
- The **Play** button will have an ear on its face  when an audio sound is the current media. Click this button to hear the sound.
- The **Play** button will look like a film strip  when a video is the current media. Click this button to start the movie. A second click will stop the movie.
- The **Play** button will not appear if there is no current media.
- Use the **Previous** button and the **Next** button to step through all of the pictures linked to the data record. If both buttons are grayed, that means there are no other pictures. If a button is bold, that means there are more pictures to view in that direction. Clicking a grayed button will cycle to the picture at the other end of the sequence.
- Click the **New Media Link** button  to add a new media link to the current data record. The [Media Pick Dialog](#) will appear and allow you to choose the media you wish to link.

Message Dialog

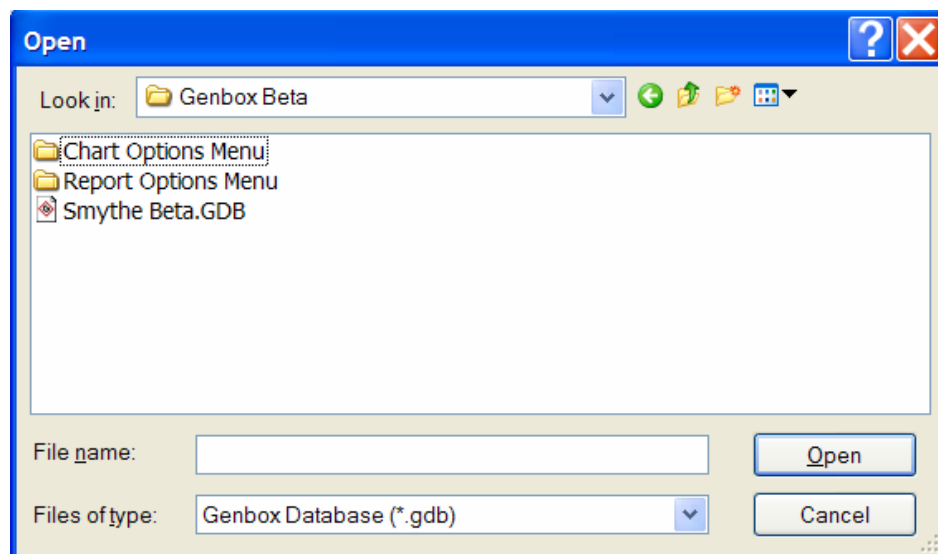
The **Message Dialog** appears when an error or warning condition occurs. It also appears when a question needs to be answered before an operation can proceed.



This is an example dialog displayed after exporting a database to GEDCOM file.

Open File Dialog

The **Open File Dialog** will appear when a filename is needed for an operation.

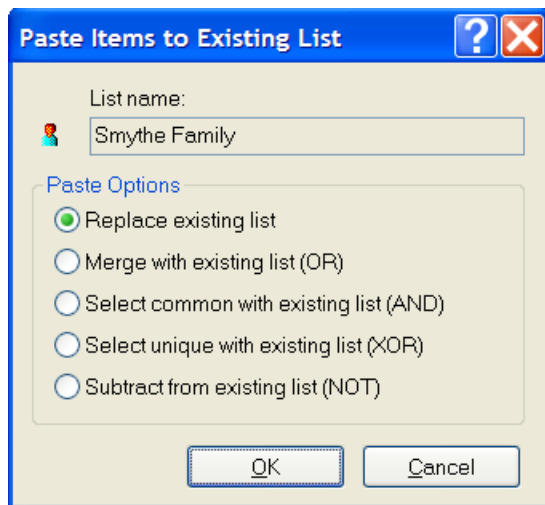


1. Type the filename into the **File name** box, or click its name in the list box.
2. Click **Open**. The dialog will close.

You can filter the view of files with the **Files of type** box. The choices of file types and the default type will vary, depending on the command selected that caused the dialog to appear.

Paste List Dialog

The **Paste List Dialog** appears when you paste a list you copied on the [List View](#). It allows you to enter a name for your new list.



If you are pasting your list to a selected destination, you will be presented with the following options for merging your list with the destination list:

- Paste as new list
- Merge with existing List (OR)
- Select common with existing list (AND)
- Select unique with existing list (XOR)
- Subtract from existing list (NOT)

Lists in Genbox contain **unique members**. When you paste to a list, only the members that are not already on the list will be added. That is why there is no "Add" option for combining two lists.

The **merge** option will result in a list that contains all members from both lists. Members that were already on both lists will only be represented once in the resulting list.


The **common** option will result in a list that contains only members that were on both lists before the operation began. Members that were only on one of the two lists will be dropped.

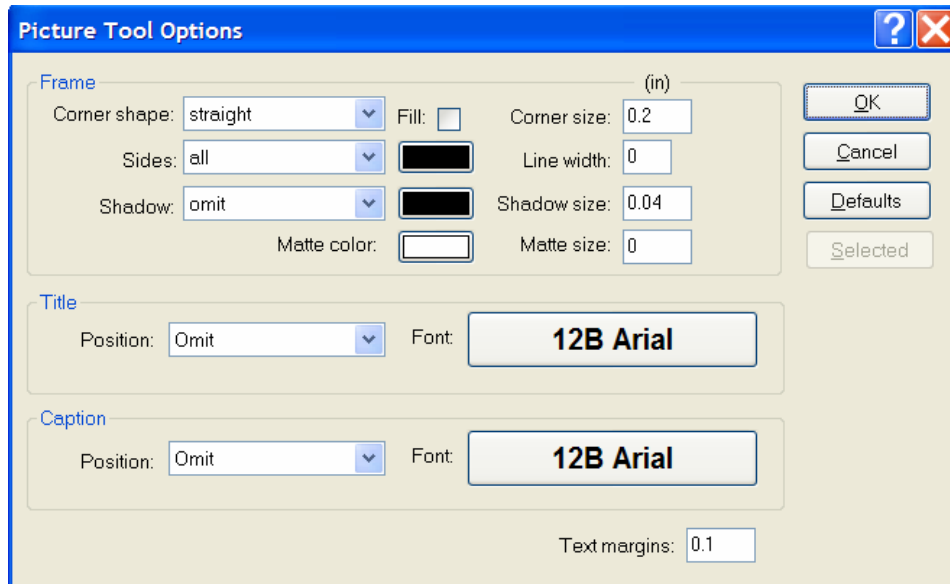
The **unique** option will result in a list that contains only members that appeared on exactly one of the two lists. Members that appeared on both lists will be dropped.

The **subtract** option will result in a list that contains the original destination members that did not also appear on the merged list.

By using these merge options to combine lists, you have powerful capabilities for manipulating your lists in Genbox.

Picture Tool Options Dialog

The **Picture Tool Options Dialog** appears when the **Picture Tool**  is double-clicked while viewing a chart or report. You can use it to change the frame, title, and caption options of a selected picture, and set default options for new pictures.



Picture Tool Options

Frame (in)

Corner shape: straight ☐ Fill: ☐ Corner size: 0.2

Sides: all ☐ Line width: 0

Shadow: omit ☐ Shadow size: 0.04

Matte color: ☐ Matte size: 0

Title

Position: Omit Font: 12B Arial

Caption

Position: Omit Font: 12B Arial

Text margins: 0.1

OK Cancel Defaults Selected

Corner Shape

The choices available on the drop-down lists for corner shapes are:

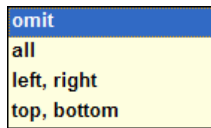
- omit
- straight
- rounded
- oval
- ellipse
- arrow
- bevel
- inset
- inset round
- dbble round
- zig-zag
- inset round

Corner Fills

Frame corners can be **filled** with the **Frame color**, for added visual effect. Click the **Corner fill** check box to select.

Sides to Include

Individual sides of the frame can be selected from inclusion. Choices from the drop-down list are:

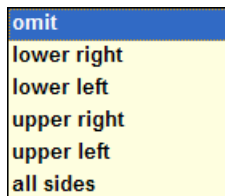


Line Width

The **Line width** boxes allow entry of the pixel width for the frame. A value of 0 means use the narrowest line possible.

Shadows

Picture boxes can have a simulated **shadow**. The **Shadow placement** boxes provide the following placement choices:



Colors for Frame, Shadow, and Matte

There is a **Color** button to select the color for the frame, shadow, and matte. Clicking any of these color buttons will open the [Select Color Dialog](#) for selection of the color.

Sizes for Corners, Shadow, and Matte

The **Corner size** specifies the size of the corner area of the frame. The corners can have special shapes. A larger corner size value will produce larger shapes.

The **Shadow size** specifies the width of the drop shadow.

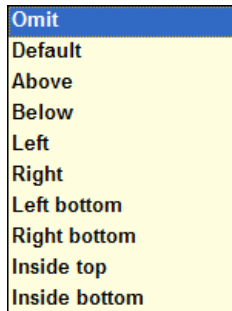
The **Matte size** specifies the size of the matte used with picture frames. The matte is the open area between the frame and the picture. A value larger than zero is necessary in order to see the matte color.

Remove Frame Button

Click this button to completely remove the picture frame.

Picture Title and Caption

Pictures may include a title and a caption. The **Picture title** box and **Picture caption** box provide the following placement options on their drop-down lists:



Left bottom will be aligned with the left edge of the picture; **Right bottom** will be aligned with the right edge of the picture. The other placements will be horizontally centered.

Inside top and **Inside bottom** will produce placements inside the picture frame, on top of the picture itself. With these placements no extra space is required to display picture titles and captions. You may need to change the font to white or some other light color in order to make it visible in front of a dark picture.

Picture Font Buttons

Fonts for picture titles and captions can be set independently with the two font buttons. Clicking a font button opens the [Select Font Dialog](#).

Text Margins

The **Text Margins** value controls the space separating the title and caption text from the picture edges.

Defaults Button

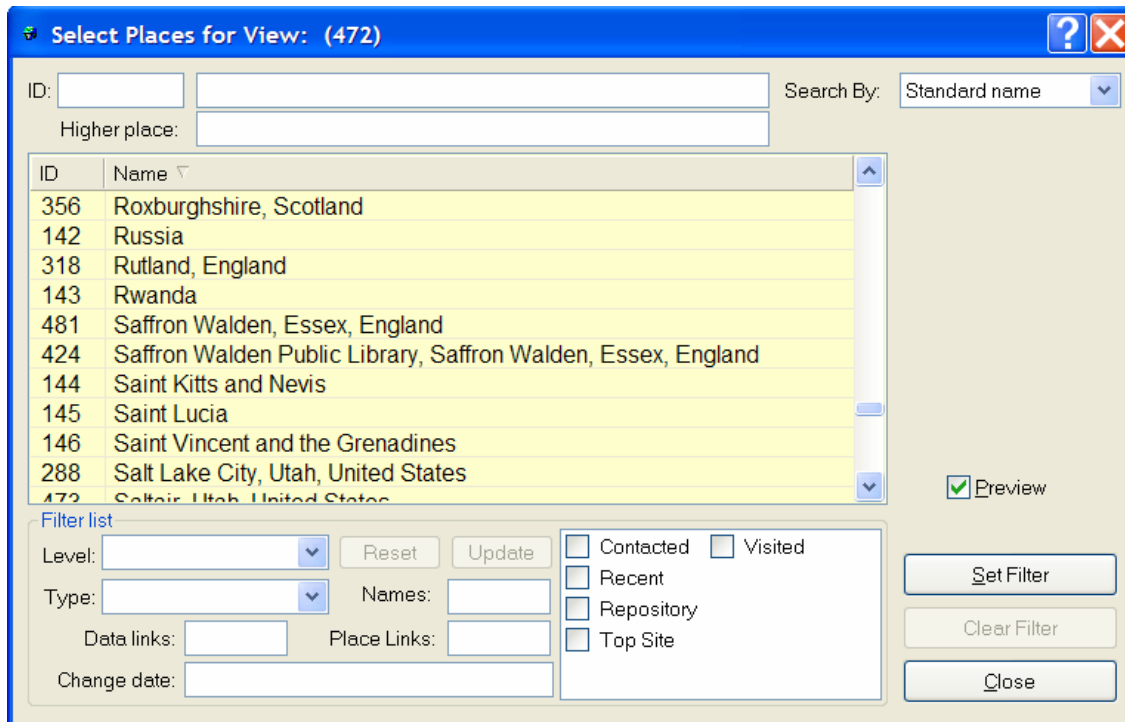
Click the **Defaults** button to set options to the defaults for pictures, as set on the [Frames Page](#).

Selected Button

Click the **Selected** button to load options from the currently selected picture.

Places Pick Dialog

The **Places Pick Dialog** is used to select place records.



ID

If you know the ID of the place, type it into the **ID** box. All names associated with that place ID will be shown automatically.

Name

Type the name of the place in the **Name** box. You can type a full place name or just the first part. All place names that begin with the portion you typed will be displayed automatically.

Higher Place

If you want to see a list of all places within a certain place, type the name of the higher place in the **Higher place** box. If you type "Ohio", for example, the names of all local sites, cities, and counties of Ohio that are stored in the Places Table will be displayed. This makes it easy to define a filter for a geographic area.

Search By

The names displayed in the list box can be one of the following choices:

All names
Standard name
Variant names

The **All names** choice will display all matching names for a place, which means it is possible for several rows in the list box to refer to the same place. If you want to avoid this possibility, choose **Standard names**, which will show and match against the standard name only. The **Variant names** choice will show all the place names **except** the standard names.

List Box

The list box has two columns: Place ID and Name. Double-click on a row to select that place.

Filter List

The places displayed in the list box can be filtered according to a number of data values:

- Place level
- Local site type
- Number of links to data
- Number of links from lower places
- Number of names
- Date last changed
- Place flags

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

When the Places Pick dialog is used to filter places on the Places View, click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The place records shown on the Places View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

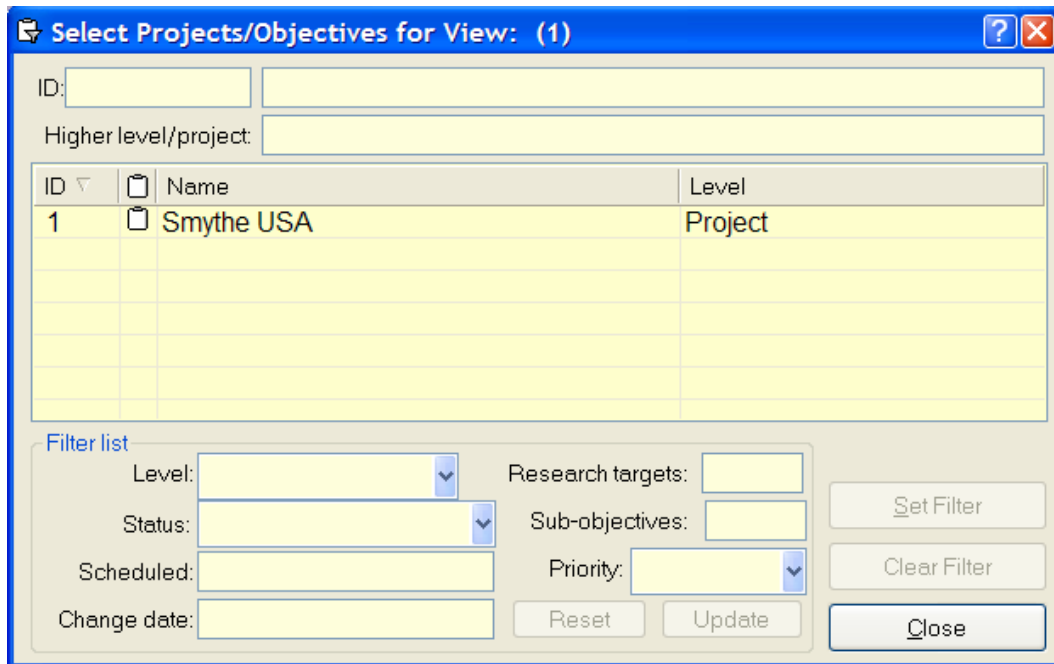
When filtering of the Places View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of place records will be shown on the Places View and will be reachable with the record movement buttons.

Preview Check Box

Click the **Preview** check box to enable viewing of the preferred media for the selected place, if any. The pictures will appear in the blank area above the check box.

Projects Pick Dialog

The **Projects Pick Dialog** is used to select project/objective records.



ID ▾	Name	Level
1	Smythe USA	Project

Filter list

Level: ▾ Research targets:

Status: ▾ Sub-objectives:

Scheduled: Priority: ▾

Change date:

Reset Update Set Filter Clear Filter Close

ID

If you know the ID of the project/objective, type it into the **ID** box. The record with that ID will be shown automatically.

Name

Type the name of the project/objective in the **Name** box. You can type a full name or just the first part. All project/objective names that begin with the portion you typed will be displayed automatically.

Higher Level/Project

If you want to see a list of all objectives beneath a certain objective or project, type the name of the higher objective or project in the **Higher level/project** box. This makes it easy to filter on a particular section of the hierarchy.

List Box

The list box has four columns: Project/Objective ID, Status, Name, and Level. Double-click on a row to select that record.

Filter List

The projects/objectives displayed in the list box can be filtered according to a number of data values:

- Level
- Status
- Date Scheduled
- Date last changed
- Number of Research Target links
- Number of sub-objectives
- Priority

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

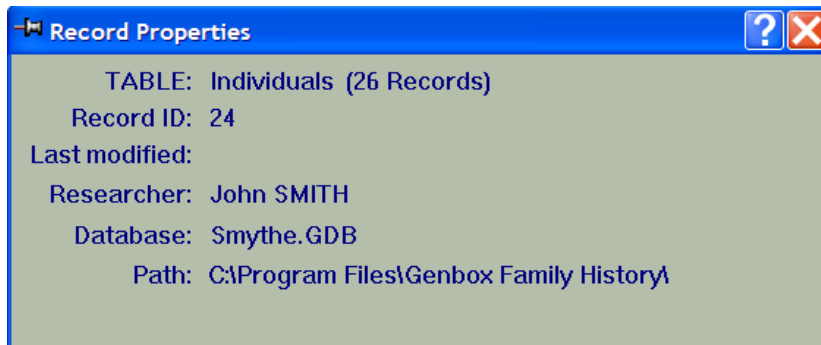
When the Projects Pick dialog is used to filter records on the Projects View, click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The records shown on the Projects View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Projects View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of records will be shown on the Projects View and will be reachable with the record movement buttons.

Record Properties Dialog

The **Record Properties Dialog** appears when **Record Properties** is selected from the Text Box Popup Menu, or from the [Edit Menu](#).



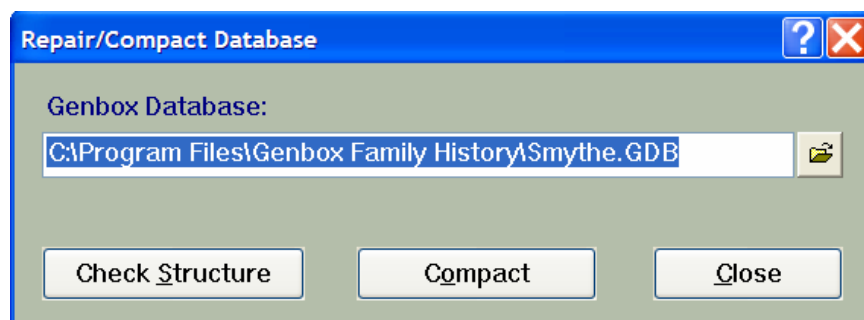
It displays properties of the current data record:

- Record ID
- Date last modified
- Researcher who last modified the record
- Current data table name and number of records
- Current database name

To see record properties for multiple records, click the image of a push pin to "pin" the dialog to the window. Then as you move to different data records, the dialog will be updated automatically.

Repair/Compact Dialog


The **Repair/Compact Dialog** can be used to repair or compact a Genbox database file.

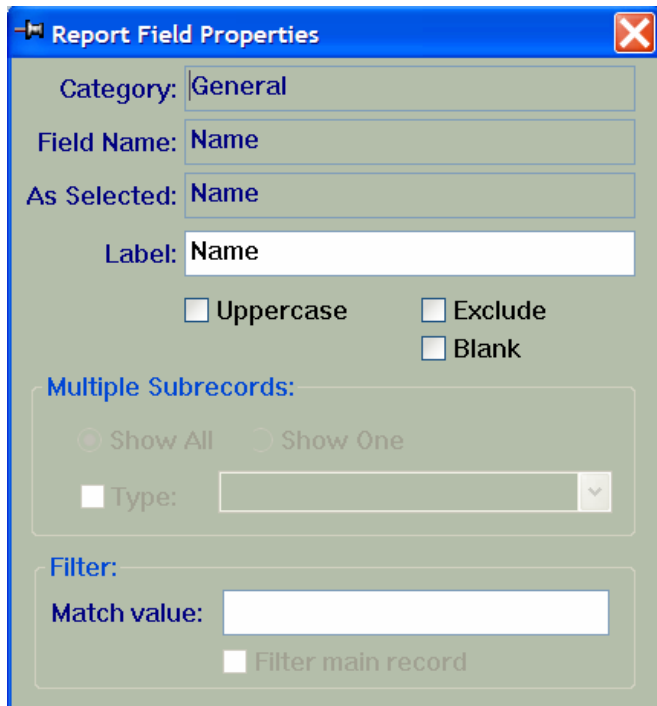


1. On the **File** menu, click **Repair/Compact**. The [Open File Dialog](#) will appear. The default filename will be the current Genbox database.
2. Browse to the desired Genbox database file (extension .GDB)
3. Click the filename in the list box or type in the file name.
4. Click **Open**. The **Repair/Compact Dialog** will appear.
5. Click **Check Structure** to check the data structure for errors. If no problems are detected, the message "Data Structure Verified" will appear.
6. If errors are detected with **Check Structure**, a message box will open summarizing the structural problems found, and you will be prompted "Please Confirm: Correct these Problems?". Click **OK** to repair the database. The message box "Data Structure Corrected" will appear, with a summary of the corrections.
7. Click **Compact** to compact the selected database. Compacting makes the file smaller by taking out deleted records.

You can repair/compact another database file by click the Open File button  and browsing for the filename, or by typing the desired filename in the **Genbox Database** box.

Report Field Properties Dialog

The properties of fields selected for a custom report can be specified with the **Report Field Properties Dialog**. When viewing the [Content Page](#) of the [Report Options View](#) (for custom reports), click on the selected field you want to set properties for. Right-click to bring up the popup menu, then click **Field Properties**. Or, click the **Field Properties**  button. The Report Fields Properties Dialog will open.



The dialog box is titled "Report Field Properties" and has a close button (X) in the top right corner. It contains the following fields and options:

- Category:** A text box containing "General".
- Field Name:** A text box containing "Name".
- As Selected:** A text box containing "Name".
- Label:** A text box containing "Name".
- Uppercase:** An unchecked checkbox.
- Exclude:** An unchecked checkbox.
- Blank:** An unchecked checkbox.
- Multiple Subrecords:** A section containing:
 - Show All:** A radio button.
 - Show One:** A radio button.
 - Type:** A dropdown menu.
- Filter:** A section containing:
 - Match value:** A text box.
 - Filter main record:** An unchecked checkbox.

Category

The **Category** box displays the name of the category of the report field. This box is read-only.

Field Name

The **Field Name** box displays the name of the report field. This box is read-only.

As Selected

The **As Selected** box displays the default label of the report field as it would appear on the report. The default label is the same as the Field Name, unless a Multiple Subrecord filter has been selected, in which case the label is modified to include the name of the selected filter.

Label

The **Label** box displays the actual label of the report field as it will appear on the report. The label is initially the same as the "As Selected" text. In this box, you can type any text that you want for the label.

Uppercase

Click the **Uppercase** check box if you want the data to appear in uppercase. When a field is marked for uppercase, the label of the field in the Selected Fields list box will be shown in uppercase to indicate this.

Note: this does not indicate that the label itself will be in uppercase. If you want an uppercase label name, you can type the label name that way in the Label box.

Exclude

Click the **Exclude** check box if you do not want the data field to appear on the report. You may wish to mark a field "Exclude" for temporary test purposes. Or, you may be using the field for filtering or sorting and do not wish to see the field on the output.

Blank

Click the **Blank** check box if you want the contents of the field to be used for spacing on the report, but don't want any text output. This makes it easier to indent or align columns after an inserted line break. It can also be used to add space on a report for data entry blanks or any other spacing purposes.

Show All, Show One

For fields that can have multiple values, click the **Show One** radio button if you wish to include only one value on the report. When selected the text "(1)" will appear after the label name in the Selected Fields list box to indicate this.

The default for fields with multiple values is **Show All**.

Note: if a field type is also selected, this setting is reinterpreted to mean all values of the selected field type.

Type

When checked, the Field Type drop-down list can be used to select the field type. The field types vary with each field.

Filter Box

The **Filter Box** can be used to edit the filter match pattern for the report field, if any.

Push Pin

To view and set the properties for multiple report fields, click the image of a push pin to "pin" the dialog to the window. Then click on each field you want to see properties for. The dialog will be updated automatically.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

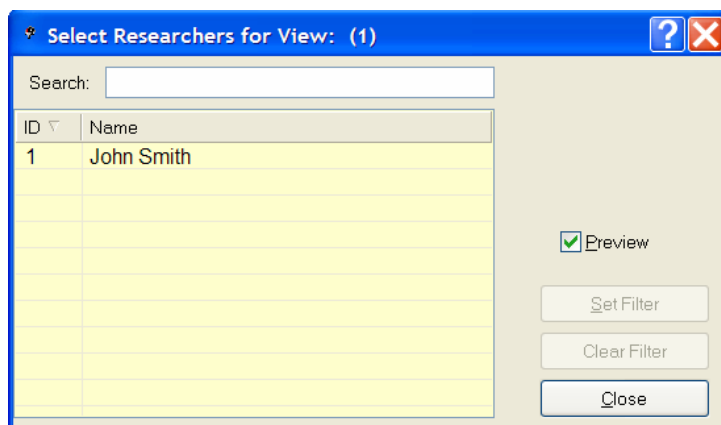
When the Research Targets Pick dialog is used to filter Research Targets on the [Research Targets View](#), click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The Research Target records shown on the Research Targets View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Research Targets View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of Research Target records will be shown on the Research Targets View and will be reachable with the record movement buttons.

Researchers Pick Dialog

The **Researchers Pick Dialog** is used to select researcher records.



ID

If you know the ID of the researcher, type it into the **ID** box. The researcher record with that researcher ID will be shown automatically.

Name

Depending on your choice for **Search by**, type the researcher name, title, author, publisher/subject, or place into the text box. You can type a full value or just the first part. All researcher records with values that begin with the portion you typed will be displayed automatically.

List Box

The list box has two columns: Researcher ID and Name. Double-click on a row to select that researcher.

To sort on a column, click its header. A second click on the same column header will show the reverse sort. A triangle will indicate the current sort column and direction of sort; the triangle will point in the direction of increasing values.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

When the Researchers Pick dialog is used to filter researchers on the [Researchers View](#), click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The researcher records shown on the Researchers View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

When filtering of the Researchers View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of researcher records will be shown on the Researchers View and will be reachable with the record movement buttons.

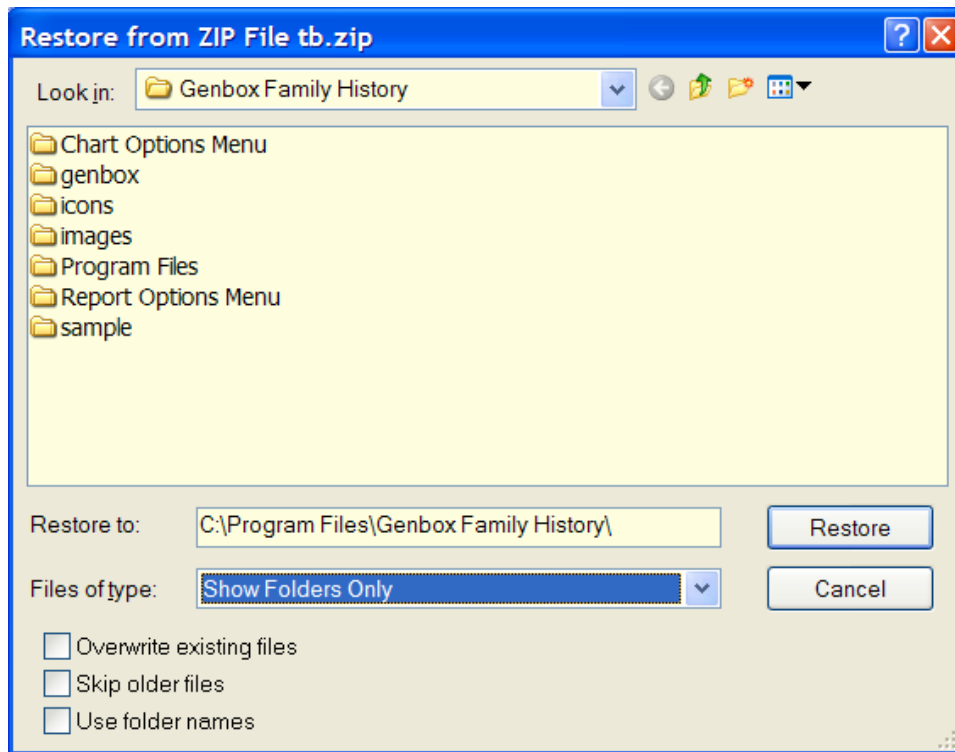
Preview Check Box

Click the **Preview** check box to enable viewing of the preferred media for the selected researcher, if any. The pictures will appear in the blank area above the check box.

Restore from ZIP File Dialog

The **Restore from ZIP File Dialog** is used to select a folder for files restored from a backup file (or any ZIP file).

- To open the dialog, begin by clicking **Restore** on the **File** menu. The [Open File Dialog](#) will appear.
- Select the backup file, then click **Open**. The **Restore from ZIP File Dialog** will appear.

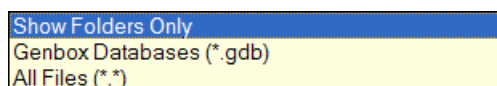


Restore Filename Box

Type the desired folder in the **Restore to** box. You can also click on a folder in the list box.

Files of Type Box

This dialog normally displays only **folders** in the list box. Files are not shown. You can use the **Files of type** box to change this behavior. Choices are:



You might want to change it to "Genbox databases" or "All files" if you are concerned that your selected destination folder may already contain files that would conflict with the files being restored.

Overwrite Existing Files

Normally, when a file being restored has the same name as an existing file in the destination folder, a message box will appear, asking if you want to replace the existing file, giving file sizes and last modified dates for comparison. Your choices on this message box are:

- Yes
- Yes to All
- No
- No to All
- Cancel

You will get this message box for each file conflict, unless you choose "Yes to All" or "No to All".

If you want to avoid getting the message box and don't mind if files are overwritten, click the **Overwrite existing files** check box before performing the restore operation.

Skip Older Files

Click **Skip older files** if you don't want to overwrite any files that are newer than files of the same name being restored from the backup. When the backup file has an earlier date than the file of the same name in the destination folder, it will be skipped.

Use Folder Names

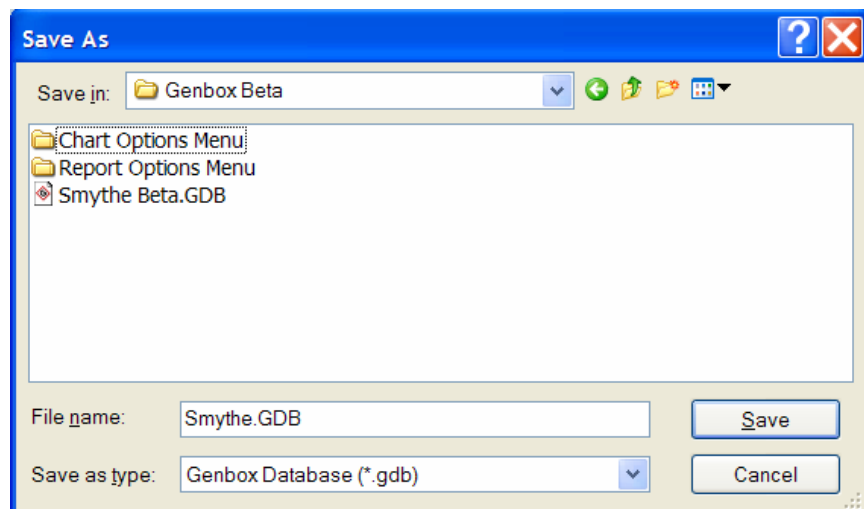
A backup file can be saved for full path names. If you want to use the path names stored in the backup file, click **Use folder names**. Otherwise, all files will be restored to the specified destination folder.

Restore Button

When you have the restore options set properly, click the **Restore** button to perform the operation. The "Restore Operation Completed" message box will appear when the operation is finished.

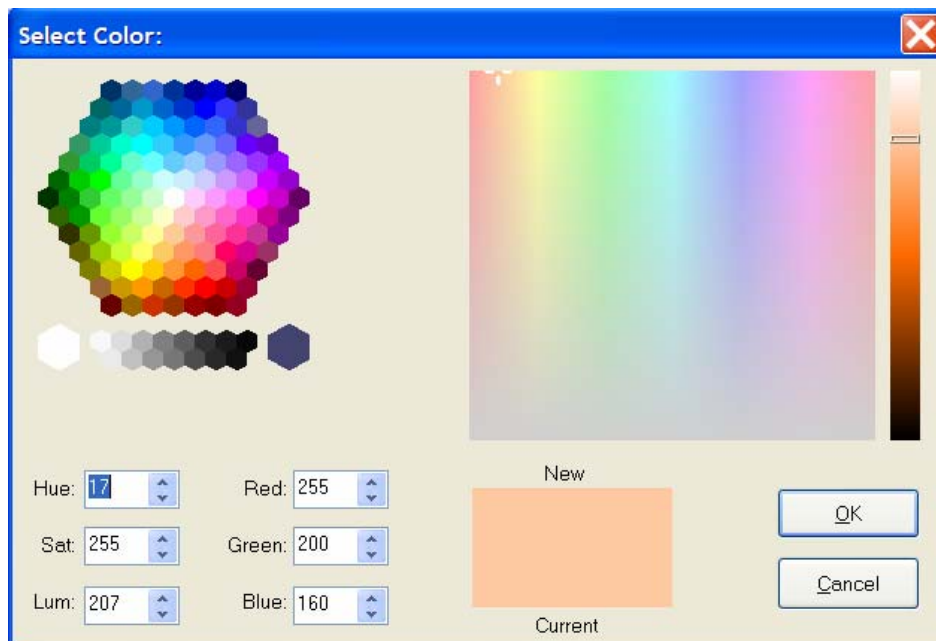
Save File Dialog

The **Save File Dialog** will appear when a filename is needed for output. Its controls are the same as the [Open File Dialog](#).



Select Color Dialog

The **Select Color Dialog** appears when a **Color** button is clicked. It allows you to select a color for the associated element.



Predefined Colors

A number of predefined colors appear on the left side. Click a hexagon-shaped region to select its color. A white border will appear around the selected color.

Hue, Saturation, and Luminance

In the **hue**, **saturation**, and **luminance** color model, hue is the color tint, saturation can be thought of as the shade or "amount" of color, and luminance is the brightness. Each has a range of 0 to 255.

A **hue** of 0 is red, 42 is yellow, 85 is green, 170 is blue, 212 is purple. 255 is back to red again.

At the maximum **saturation** of 255, colors are the most vivid. As saturation approaches 0, the color appears more and more washed out. At 0, the color is a shade of gray.

Luminance varies from 0 to 255. Colors appear with medium brightness at 128. As luminance moves toward 255, the color moves to white. As luminance moves toward 0, the color moves to black.

You can directly set the values for hue, saturation, and luminance by typing values into the corresponding text boxes, or using the up-down buttons.

Red, Green, and Blue

In the **red**, **green**, **blue** color model, the three primary components are set independently. Each has a range of 0 to 255. The values can be thought of as the "amount" of color being added. Colors are notated in (red, green, blue) order. Maximum red would be (255 0 0). Green is (0 255 0). Black is (0 0 0) and White is (255 255 255).

You can directly set the values for red, green, and blue by typing values into the corresponding text boxes, or using the up-down buttons.

Hue-Saturation Square

The **Hue-Saturation square** displays a range of continuous colors. The horizontal dimension is hue, ranging from 0 at the left edge to 255 at the right edge. The vertical dimension is saturation, ranging from 255 at the top edge to 0 at the bottom edge. The luminance is constant across the square, and is controlled by the setting of the **Luminance Selector**.

You can pick a color from the square by clicking at the desired color spot.

Luminance Selector

The **Luminance Selector** appears to the right of the **Hue-Saturation** square. It displays a range of luminance, from 255 at the top to 0 at the bottom. A "thumb" marks the current selection.

To change the luminance, drag the thumb up or down. When you stop dragging, the **Hue-Saturation** square will be redrawn with the new luminance value. A value in the middle will produce the most vivid colors.

New and Current Colors

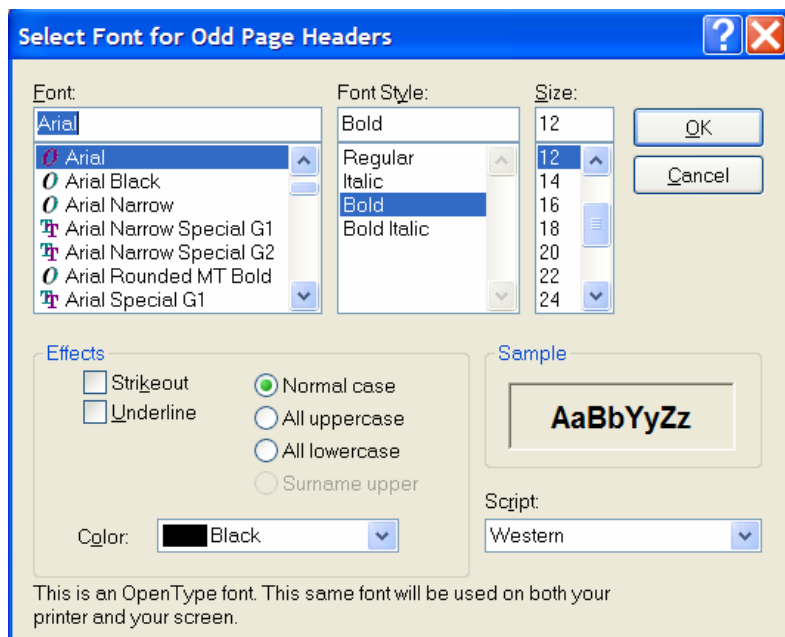
The **New** color box displays the newly selected color. The **Current** color box displays the color that is currently set for the associated element, which is the default for the New color when the dialog is first opened. By comparing the two colors side by side, you can determine how the new color compares to the old.

If your display is in 256-color mode, the New color box will be divided into two halves: the selected color will be shown on the right half, and it may be **dithered** between two or more colors in order to best represent the selected color. The left half of the New color box will display the nearest solid color from the 256 colors available. Dithered colors appear to have a grain or texture to their appearance.

- To use the displayed dithered color, simply click OK to close the dialog.
- To use the displayed solid color, click on the left half of the New color box. The solid color will replace the dithered color.
- To reset the New color to be the same as the Current color, click the **Current** color box.

Select Font Dialog

The **Select Font Dialog** allows you to set font characteristics for a specific element.



Case

When enabled, you can control the case of the text shown in the font. Choices are:

- Normal case
- All uppercase
- All lowercase
- Surname uppercase

Select Font for Multiple Group

When there are several font buttons on a view window page, it is possible to set font characters for several of them at one time.

1. **To set font characteristics for several fonts at once**, press and hold the SHIFT key.
2. Click each font button you want to affect. A **selection rectangle** will appear on the button face.
3. Release the SHIFT key, then click any of the selected buttons to open the **Font Dialog**.
4. Changes you make will affect all font buttons in your selected group.

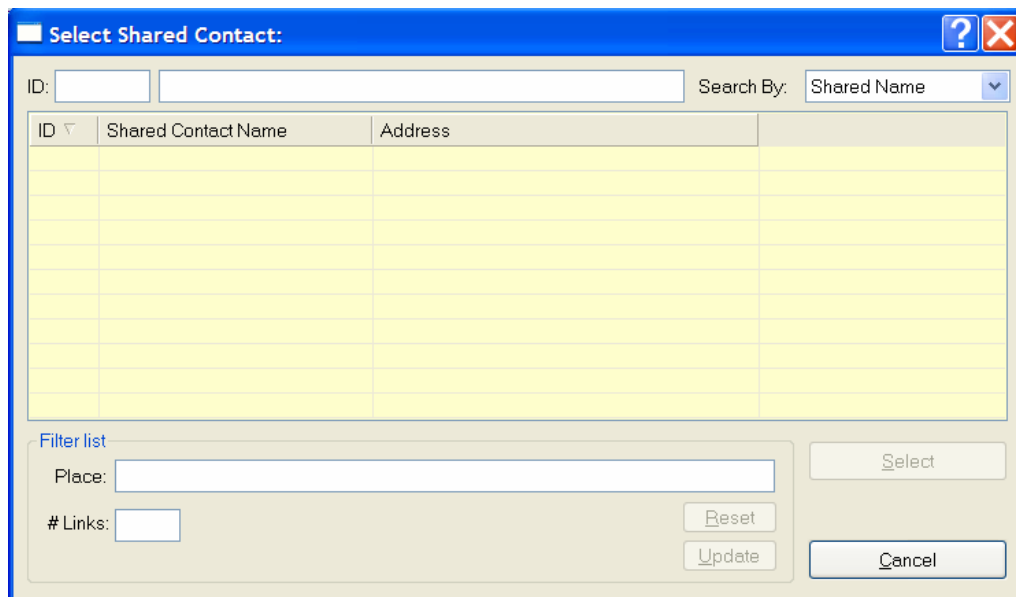
Setting font characteristics for a font group differs from a single font in some respects:

- The dialog will initially show a value for only the font characteristics all of the fonts have in common. Otherwise, the value for a font characteristic will be blank.
- Blank settings that are not given a value will have no effect when the dialog is closed.

This makes it possible to change only the Font family for a group of fonts, without affecting the font sizes and styles, which can all be different. Or, the font sizes for all fonts on a page can be set to the same value, without affecting the font families and styles.

Shared Contact Pick Dialog

The **Shared Contact Pick Dialog** is used to pick shared contact records.



Select Shared Contact:

ID: Search By: Shared Name

ID	Shared Contact Name	Address

Filter list

Place:

Links:

ID

If you know the ID of the Contact record, type it into the **ID** box. The record with that Contact ID will be shown automatically.

Search By

You can search by **Shared name** or **Address**.

Text Box

Depending on your choice for **Search by**, type the shared name or address into the text box. You can type a full value or just the first part. All records with values that begin with the portion you typed will be displayed automatically.

List Box

The list box has three columns: Contact ID, Shared Name, and Address. Double-click on a row to select that contact.

Filter List

The contact records displayed in the list box can be filtered according to a number of data values:

- Place of address
- Number of links to data

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Sources Pick Dialog

The **Sources Pick Dialog** is used to select source records.

Select Sources for View: (17)

ID: Search By:

ID	Type	Name
1	Book	Township Papers
2	Book	Smythe Family Records
3	Book	Par Reg Ickleton
4	Book	K.C. Grad
5	Book	Officer Service
6	Book	Land Grants
7	Document (General)	R Smythe Will
8	Bible Record	Smith Bible
9	Book	1851 Census
10	Document (General)	MacPhail's Cemetery
11	Book	Land Titles ON

☒ Preview

Filter list

Level: Type:

In repository:

Publication date: Links:

Change date: ☐ Recent

ID

If you know the ID of the source, type it into the **ID** box. The source record with that source ID will be shown automatically.

Search By

You can search for sources by values in the following data fields:

Name
Source Title
Author/Compiler
Publisher/Subj.
Place

The third column in the list box will change to reflect your selection.

Text Box

Depending on your choice for **Search by**, type the source name, title, author, publisher/subject, or place into the text box. You can type a full value or just the first part. All source records with values that begin with the portion you typed will be displayed automatically.

List Box

The list box has three columns: Source ID, Type, and a third column that is dependent on your choices for [Search by](#). Double-click on a row to select that source.

To sort on a column, click its header. A second click on the same column header will show the reverse sort. A triangle will indicate the current sort column and direction of sort; the triangle will point in the direction of increasing values.

Filter List

The sources displayed in the list box can be filtered according to a number of data values:

- Source level
- Source type
- Repository
- Publication date
- Number of links
- Date last changed
- Recent flag

After changing values in the filter group, click the **Update** button to update the list box.

Click the **Reset** button to clear all filter conditions.

Select Button

The **Select** button is enabled when one of the names in the list is highlighted. Click this button to select the highlighted record and close the dialog.

Select All Button

Click **Select all** when you want to select **all** of the names shown in the list.

Set Filter Button

When the Sources Pick dialog is used to filter sources on the [Sources View](#), click the **Set Filter** button to turn filtering on with the current filter conditions and close the dialog. The source records shown on the Sources View and reachable with the record movement buttons will be restricted to those matching the filter conditions.

Clear Filter Button

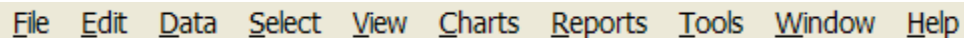
When filtering of the Sources View has been turned on, click the **Clear Filter** button to turn **off** filtering and close the dialog. The full set of source records will be shown on the Sources View and will be reachable with the record movement buttons.

Preview Check Box

Click the **Preview** check box to enable viewing of the preferred media for the selected source, if any. The pictures will appear in the blank area above the check box.

Main Menu Bar

The **Main menu bar** extends across the top of the Genbox main window.



File Edit Data Select View Charts Reports Tools Window Help

When a database is open, the menus available are named **File, Edit, Data, Select, View, Charts, Reports, Tools, Window, Help**. If a Web Page report is being viewed, an additional menu named **Favorites** will be available. When no database is open, the menus available are limited to File, Edit, View, Tools, Window, and Help.

[File Menu](#)

[Edit Menu](#)

[Data Menu](#)

[Select Menu](#)

[View Menu](#)

[Charts Menu](#)

[Reports Menu](#)

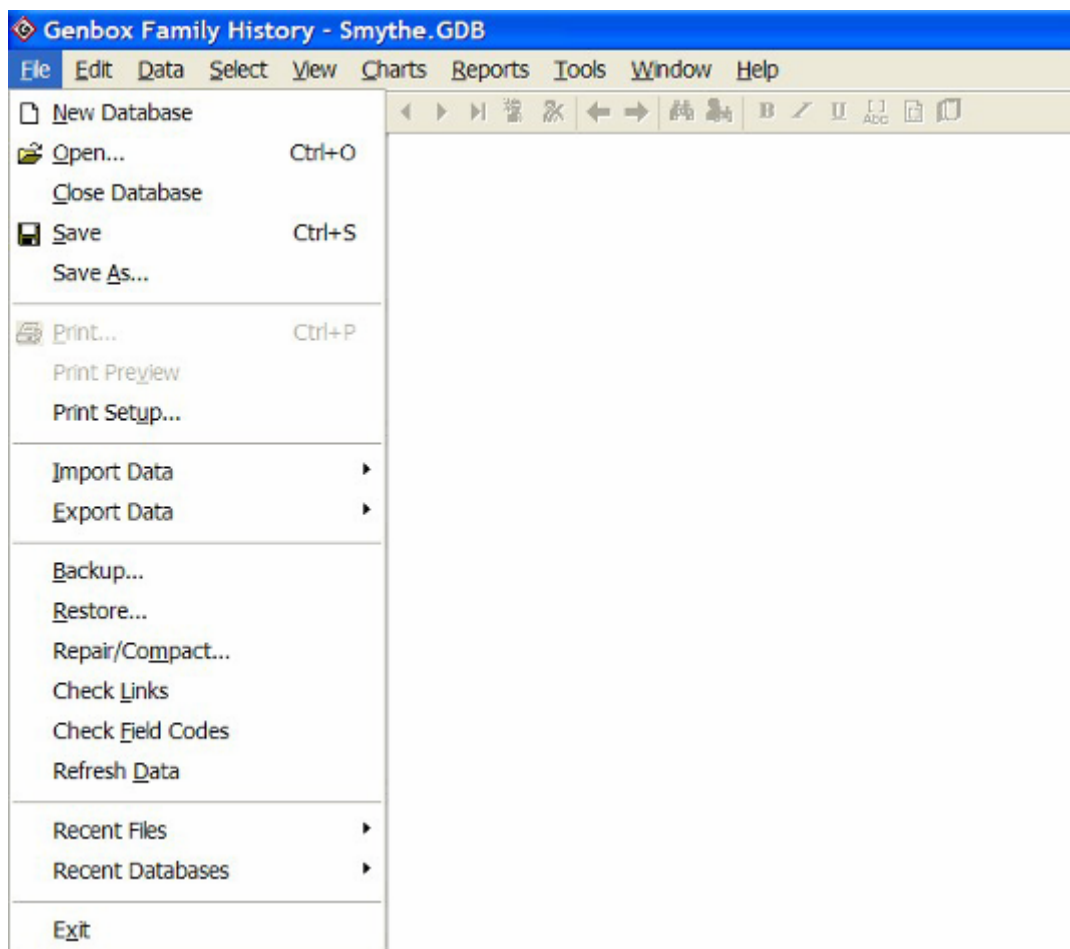
[Tools Menu](#)

[Window Menu](#)

[Help Menu](#)

File Menu

The **File** menu provides access to file management and printing functions.



New Database

On the **File** menu, click **New Database** to create a new Genbox database. The [Open File Dialog](#) will appear and prompt you to supply a name for the database. The default extension is .GDB. The [Individuals View](#) will then be opened with a blank record, ready for data entry.

New Genbox databases are initialized with basic data in the following tables:

- Event Types
- Source Types
- Identifier Types
- Individual, Place, and Media Flag Names
- Places

If you have an existing database that you have customized the event types, source types, identifier types, or flag names and you want to carry these changes into your new database, you should do a GEDCOM export of the desired data types from your existing database, then a GEDCOM import into the new database. See the chapter [Sharing Your Data](#) for information on exporting and importing.

As an alternative, you can base your new database on a file copy of your existing database. Using Windows Explorer, make a copy of your existing database and give it a new name. Open this new database, then delete the data you do not want.

Open...

Click this menu option or toolbar button to open a Genbox database, a saved Chart or Report file, or other file type. More than one database can be open at one time. When selected, the [Open File Dialog](#) will appear.

Close Database

This menu option will close the current database, closing all open views for that database as well. Open databases will also be closed when the **File: Exit** menu option is selected to exit the program.

Save

Click this menu option or toolbar button to save changes to the current document.

File Menu: Save As

Click this menu option to save the current document to a different filename.

File Menu: Print...

Click this menu option or toolbar button to open the Print Dialog Window, which allows you to select options for printing the current chart or report.

File Menu: Print Preview

Click this menu option to open the **Print Preview Dialog**.

Print Setup

Click this menu option to open the Print Setup Dialog.

Import Data from GEDCOM File

On the **File** menu, point to **Import Data** and then click **from GEDCOM File** to import data from a GEDCOM file.

The [Open File Dialog](#) will appear. Select the GEDCOM file you want to import data from, then click **OK**. The [Import File View](#) will appear, allowing you to view information about the file and set import options.

Import Data from Genbox Database

On the **File** menu, point to **Import Data** and then click **from Genbox File** to import data from a Genbox database.

The [Open File Dialog](#) will appear. Select the Genbox database you want to import data from, then click **OK**. The [Import File View](#) will appear, allowing you to view information about the file and set import options.

Export Data to GEDCOM File

On the **File** menu, point to **Export Data** and then click **to GEDCOM File** to save a copy of a portion of the data from the current Genbox database to a file in GEDCOM format. The [Export Options View](#) will open, where you can set options for export and then click **Make Export File** to complete the operation.

Export Data to Genbox Database

On the **File** menu, point to **Export Data** and then click to **Genbox Database** to save a copy of a portion of the data from the current Genbox database to a new Genbox database file. The [Export Options View](#) will open, where you can set options for export and then click **Make Export File** to complete the operation.

Backup

1. To make a backup file, on the **File** menu, click **Backup**. The [Backup Select Files Dialog](#) will appear.
2. Select the files you want to back up, then click **Add**. The [Save File Dialog](#) will appear.
3. Enter a name for your backup file, then click **Save**.

File Menu: Restore

To restore files from a backup file made previously with Backup:

1. On the **File** menu, click **Restore**. The [Open File Dialog](#) will appear.
2. Select the backup file you want to restore, then click **Open**. The [Restore from ZIP File Dialog](#) will appear.
3. Enter the desired destination folder to restore the files to, and other options.
4. Click **Restore**.

The default extension for backup files is .ZIP.

File Menu: Repair/Compact

On the **File** menu, click **Repair/Compact** to repair or compact a Genbox database. The [Repair/Compact Dialog](#) will open. The default filename will be the current Genbox database. Click **Check Structure** to see if the database needs repairing. Click **Compact** to compact the database.

File Menu: Check Links

Genbox databases are **relational**. A relational database contains multiple tables of data records. Data records can link to records in the same table or other tables. If Genbox is not exited by clicking **Exit** on the **File** menu, the data may become corrupted. If you suspect that the links between data records may need repair, click **Check Links** on the **File** menu.

A progress dialog will appear, showing the progress of the operation. All links will be checked. If there are any problems encountered, you will be prompted whether the problems should be corrected. You will be able to review a log file before answering the question that details all the problems that have been detected. Click **Yes** to have all the problems corrected.

Note: This operation also checks for missing or invalid field code links, including embedded source citation references. If you have a database that was created prior to version 3.5, Check Links should be performed to initialize this field code tracking feature.

Refresh Data

After changes have been made to a Genbox database by external programs, or when the program was abnormally terminated, you may need to click **Refresh Data** on the **File** menu. This operation will look through the tables for internal consistency and make corrections where needed.

This operation will also update **internal event date estimates**, which are used to sort individual events that are missing a date or do not have a recognizable date. This ensures that events are displayed in the expected order in chart boxes and on reports.

Recent Files

The **Recent Files** submenu maintains a list of the 10 most recent (non-database) files accessed in Genbox. These files are number 1 through 10. You can open one of these files by clicking its name.

Recent Databases

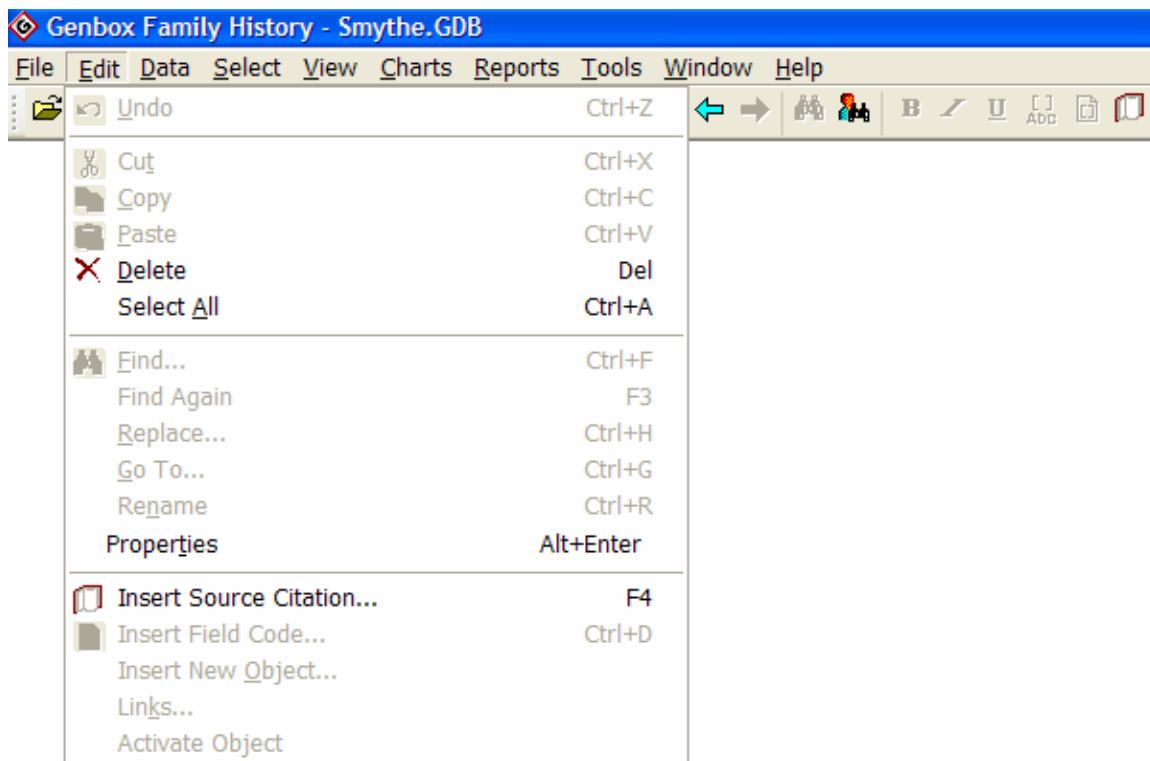
The **Recent Databases** submenu maintains a list of the 10 most recent database files accessed in Genbox. These files are number 1 through 10. You can open one of these databases by clicking its name.

Exit

On the **File** menu, click **Exit** to exit Genbox. Always exit the program this way to ensure the current database is closed properly.

Edit Menu

The **Edit** menu provides editing functions for the current text box.



Undo

Click **Undo** to undo the most recent editing change to the current text box.

Cut

Click this menu option or toolbar button to remove the current selection and place it on the clipboard.

Copy

Click this menu option or toolbar button to copy the current selection and place it on the clipboard.

Paste

Click this menu option or toolbar button to paste the contents of the clipboard to the current location of the text cursor.

Delete

Click this menu option to delete the current selection.

Select All

For text boxes, click this menu option to select all of the text in the box. For charts, click this menu option to select all of the chart boxes. For lists, click this menu option to select all list members.

Find

Click the **Find** toolbar button or menu option to open the [Find Dialog](#), where you can specify match conditions to find objects on the chart or report. You can also press CTRL+F for this option.

Find Again

Click **Find Again** to repeat the previous [Find Dialog](#) operation. You can also press F3 for this option.

Jump to [Data Type]

For data items, click this menu option to jump to the main data record for the data reference displayed.

For charts, click this menu option to jump to the record on the [Individuals View](#) for the individual displayed in the selected chart box. The chart will remain open as the Individuals View is brought in front.

Go To...

For reports, click this menu option to go to a specified page of the report. A dialog will appear for entry of the page number. You can also press CTRL+G for this option.

Rename

For the [List View](#), click this menu option to rename the current list.

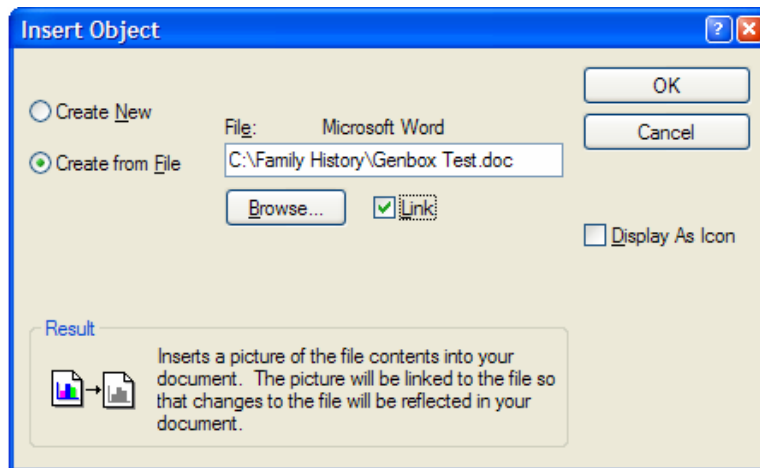
Properties

For a text box, click this menu option to view properties associated with the current data record. When selected, the [Record Properties Dialog](#) Box will appear.

For a selected list name on the [List View](#), click this menu option to view properties for the selected list. The [List Properties Dialog](#) will appear.

Insert New Object

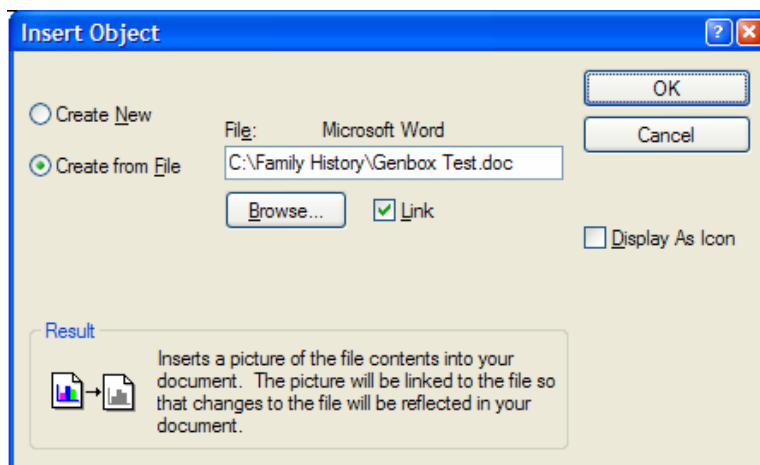
This menu option is part of the OLE (Object Linking and Embedding) system. You can use it to embed or link to an external document when editing a Genbox chart. This makes the external document part of the chart. Then when the object is selected on the chart, you can choose "Activate Object" from the menu to "Open" or "Run" the embedded/linked object. Once it has been added to the chart, you can move and size it like any other chart box.



For example, you could link or embed an important source document from Microsoft Word, so that people viewing your chart could also read the source document that the chart information is based upon. Or maybe you have related information stored in an Excel spreadsheet that you would like the viewer to see. Or perhaps you have designed an elaborate title, legend box, fancy box frame, or in-depth sidebar in another text processing or graphic program. You can link it into your chart using this menu command.

Links

This menu option is part of the OLE (Object Linking and Embedding) system. When selected, a dialog will open that displays a list of the linked objects in the active chart, if any. You can use this dialog to update, open, change, or remove linked objects in your chart.



Activate Object

This menu option is for use by the OLE (Object Linking and Embedding) system. When there is an OLE object selected on a Genbox chart, use this option to "Open" or "Run" the embedded/linked object.

The **Data Menu** provides access to a number of data record manipulation operations.



Click this option to restore changes to the current data record.

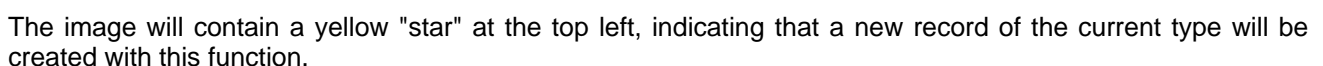
Click this menu option to add a subrecord to the current main record.

Click this menu option to delete the current subrecord.

Click this menu option to make another record in the current table that is a duplicate of the current record. Often it is easier to add new records by starting with a copy of an existing record and making changes, rather than by clicking **New** and starting with a blank record.

Click this menu option or toolbar button to cause the current View Window to create a new main record in the corresponding data table. The new record will become the current record. In most views, the new record will be blank and the ID box in the header will show as "New".

The icon on this toolbar button or menu option will change, indicating the type of data record that will be created:



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Click this menu option to **merge records**. The menu option will change, depending on the current view or page.

- To merge records, first position the view on the record you want to **keep** (the "target" record).
- Choose **Merge Records** from the Data Menu.
- You will be prompted to select another record. This is the record you want to **merge** (the "source" record)
- You will be asked to confirm the merge. Click "Yes" to perform the operation.

The following record types can be merged:

- **Event Templates:** Event Types View
- **Individuals:** Individuals View
- **Events:** Individuals View, Events Page
- **Places:** Places View
- **Researchers:** Researchers View
- **Sources:** Sources View

When a record is merged into another record, all non-blank values in the target record are usually retained. Any links to the source record are transferred to the target record. The source record is then deleted.

Extract Marked Subrecords

When you decide that subrecords attributed to one individual actually are a different person, you need to move them. After you have marked the subrecords you want to move, click **Extract Marked Subrecords** on the **Data** menu. A message box will prompt for confirmation, then the selected subrecords will be transferred to a new individual.

Delete Record



Click this menu option or toolbar button to cause the current View Window to delete the current main record in the corresponding data table. You will be prompted to confirm the operation before the deletion takes place.

The icon on this toolbar button or menu option will change, indicating the type of data record that will be deleted:



In all cases, the image will contain a red "X" at the lower right.

List View Deletions

If the current view is the List View, with a list in the Tree pane highlighted, clicking this button will cause that list to be deleted.

If the current view is the List View, with one or more records in the List pane highlighted, clicking this button will delete the selected records only.

Delete Selected Records

When a list name or one or more list records have been selected on the **List View**, this menu option can be used to **delete** all of selected data records.

If one of the "Records" lists is selected, such as the Individuals List, the menu item will display as:

Delete ALL Individual Records

If one of the saved individual lists is selected, or if one or more records on the right side of the Lists View is selected, the menu item will display as:

Delete Selected Individual Records

WARNING! This operation permanently removes data from your database. When selected, a confirmation window will appear. If confirmed, the referenced data records will be permanently removed.

Restore Excluded Links

On the Individuals View, there is a check box on the Parents and Family pages labeled "Exclude link from reports". When checked, these records will be skipped when producing charts and reports. This feature allows you to selectively include certain relationships when producing output. You may wish to mark several links as "Exclude" in order to tailor the output of a chart you are making, for example. Later, you will likely want to clear these check boxes so that relationships will again be included.

Click the **Restore Excluded Links** menu option to clear all of the "Exclude" check boxes for parent and family links, restoring all links.

Change Preferred Identifiers

The **P** column on the Individuals View: Identifiers Page contains check marks next to those identifiers that are **preferred**. Genbox builds a composite name for an individual based on the names that are marked. This composite name, or **preferred name**, is used when a reference is made to an individual from elsewhere in the program.

If you want to clear or mark the **preferred** checkbox for all identifiers of a particular type, such as "User ID", select **Change Preferred Identifiers** from the Data menu. The **Change Preferred Identifiers** dialog will appear. Select the identifier type you want to change, then click either the **Mark All** or **Clear All** button.

Identify Default Researcher

When data is entered into a database before a current researcher is identified, it will be assigned as entered by "default researcher". After you have created a researcher record for yourself on the **Researchers View**, you can use the **Identify Default Researcher** menu option to identify the correct researcher for the data entered previously. Before selecting this option, open the Researchers View and position the view on the correct record.

Update Empty Language Fields

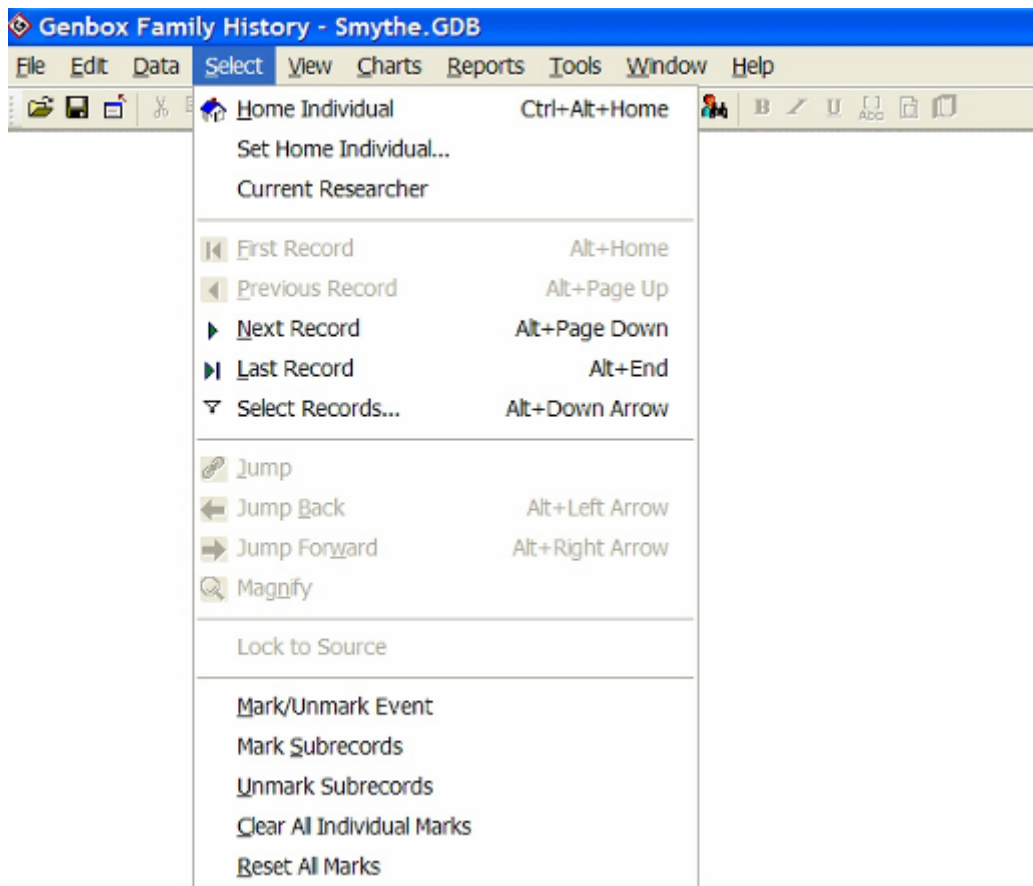
A database created prior to version 3.1.4 will not have any values set in the event template records for language. You can update each record one at a time to enter the correct language, or you can update all of the event template records that have a blank language value at once. To do this update procedure:

- First, verify that the current program language (set in Preferences on the Operation page) is the desired language.
- Open the Event Types View.
- Choose **Update Empty Language Fields** from the Data menu. When asked to confirm, choose OK.

This operation should be performed once for existing Genbox databases.

Select Menu

The **Select Menu** contains operations to move to particular data records or to mark the current selection. Unlike the Data Menu, these operations do not alter the data.



Home Individual

Click this menu option or toolbar button to move to the designated home individual for the current database. The Individuals View will open if not already open.

If the Individuals View is already displaying the home individual, click this menu option or toolbar button to open the Individuals Pick Dialog, where a new home individual can be selected.

The default home individual is the first individual in the database.

The shortcut combination CTRL+ALT+HOME can be used to select this option.

Set Home Individual

Click this menu option to open the Individuals Pick Dialog, where a new home individual can be designated.

The default home individual is the first individual in the database.

First Record

Click this menu option or toolbar button to cause the current View Window to display the first record in the corresponding data table.

For the [Web Page View](#), click this menu option or toolbar button to view the first generated page.

Previous Record

Click this menu option or toolbar button to cause the current View Window to display the previous record in the corresponding data table.

For the [Web Page View](#), click this menu option or toolbar button to view the previous generated page.

Next Record

Click this menu option or toolbar button to cause the current View Window to display the next record in the corresponding data table.

For the [Web Page View](#), click this menu option or toolbar button to view the next generated page.

Last Record

Click this menu option or toolbar button to cause the current View Window to display the last record in the corresponding data table.

For the [Web Page View](#), click this menu option or toolbar button to view the last generated page.

Select Records

Click this menu option or toolbar button to open the Select Records Dialog for the current view.

Jump to Data Record

Click this menu option to jump to the main data record for the current data item.

Jump to Citations

Click this menu option to jump to the source citation record for the current data item.

Jump Back

Click this menu option or toolbar button to cause the previously displayed view to become the current view again. By using the Back and Forward buttons, you can revisit all the records and tables that you have viewed in the current session.

Jump Forward

After revisiting a previously displayed view by using the Back button, you can select this toolbar button (or menu option) to return to the view that used to be the current view. By using the Back and Forward buttons, you can revisit all the records and tables that you have viewed in the current session.

Magnify

A number of data field types support a **Magnify View or Dialog**, which shows the current data item in a larger window with additional functions. This larger window can be opened by pressing F5 or clicking the **Magnify** menu option.

The data types that can be magnified are:

Notes boxes: [Magnify Notes View](#)

Places: [Magnify Place Dialog](#)

Event templates: [Event Template Preview Dialog](#)

Witness templates: [Event Witness Template Preview Dialog](#)

Media: [Media Preview Dialog](#)

Lock Source

Click this menu option to lock the current source record to the Individuals View. The view will be restricted to data linked to the current source, and new data entered will automatically be linked to the current source.

Mark/Unmark Record

Click this menu option to mark the current record. Click again to unmark the record.

Mark Subrecords

Click this menu option to mark all subrecords of the current main record.

Unmark Subrecords

Click this menu option to unmark all subrecords of the current main record.

Clear All Record Marks

Click this menu option to clear all record marks in the current table.

Reset All Marks

Click this menu option to clear all record marks in **all** tables.

View Menu

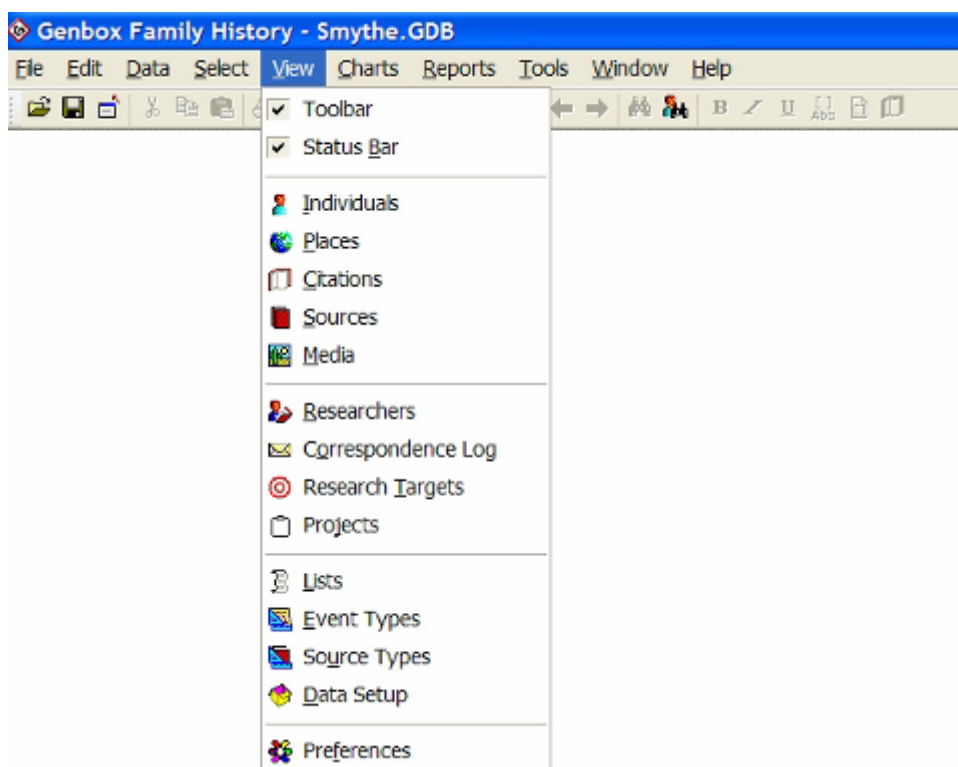
The **View menu** is used to control display of the toolbars, main data views, research views, data customization views, and preferences. Multiple views can be open at once. Typically, the main toolbar and the Individuals View are always open, and the other views are added to the display when needed.

Views can be closed by clicking on the "x" close box in the top right corner, or by choosing the Close Current Window button from the toolbar.

Note: if all views are closed, the database will also be closed.

Clicking on one of these menu options will open the indicated view, or simply bring the view to the front if already open but partially or fully obscured by other windows.

Tip: Sometimes it is useful to have two or more views of the same type open at once, as when two different records are to be compared side-by-side for a possible merger. To open another view of the same type as the current view, click Window:Open Another View.



Toolbar

Clicking this menu option will toggle the display of the [main toolbar](#). A check appears next to the menu item when the toolbar is currently displayed.

Status Bar

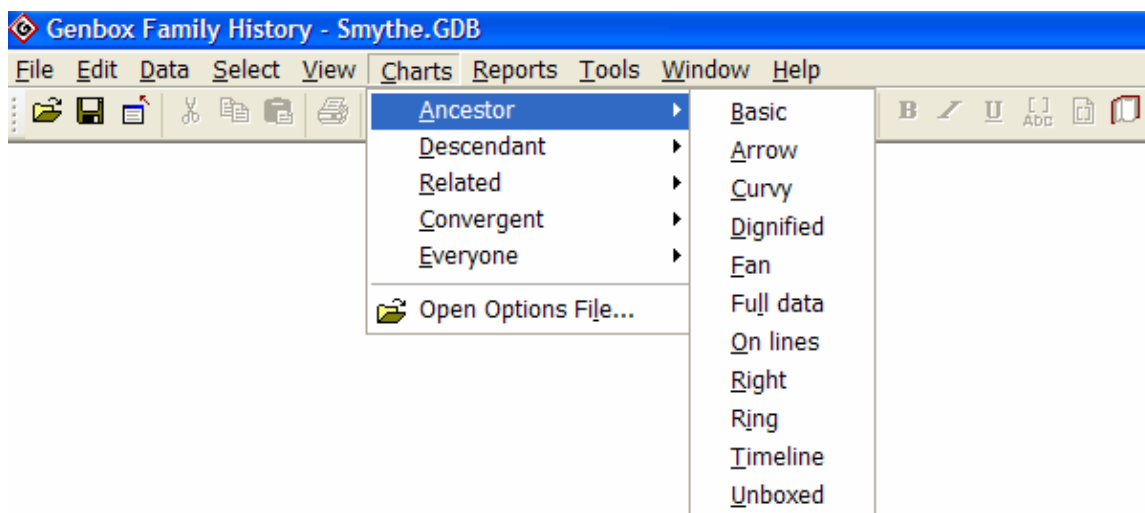
Clicking this menu option will toggle the display of the [status toolbar](#). A check appears next to the menu item when the status toolbar is currently displayed.

All Other View Menu Options

Clicking any other menu option displays the View window applicable. See the Table of Contents on where to find information on the related View window.

Charts Menu

The **Charts** menu is used to select the options for chart production. Genbox has default options for each chart type. You can define your own options files and add them as submenu options on this menu. See the section [Charts and Reports Submenus](#).



Ancestor

Click this menu option to choose an **Ancestor Chart** options file from the submenu. The [Chart Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Chart** button to produce the chart.

Descendant

Click this menu option to choose a **Descendant Chart** options file from the submenu. The [Chart Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Chart** button to produce the chart.

Related

Click this menu option to choose a **Related Chart** options file from the submenu. The [Chart Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Chart** button to produce the chart.

Convergent

Click this menu option to choose a **Convergent Chart** options file from the submenu. The [Chart Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Chart** button to produce the chart.

Everyone

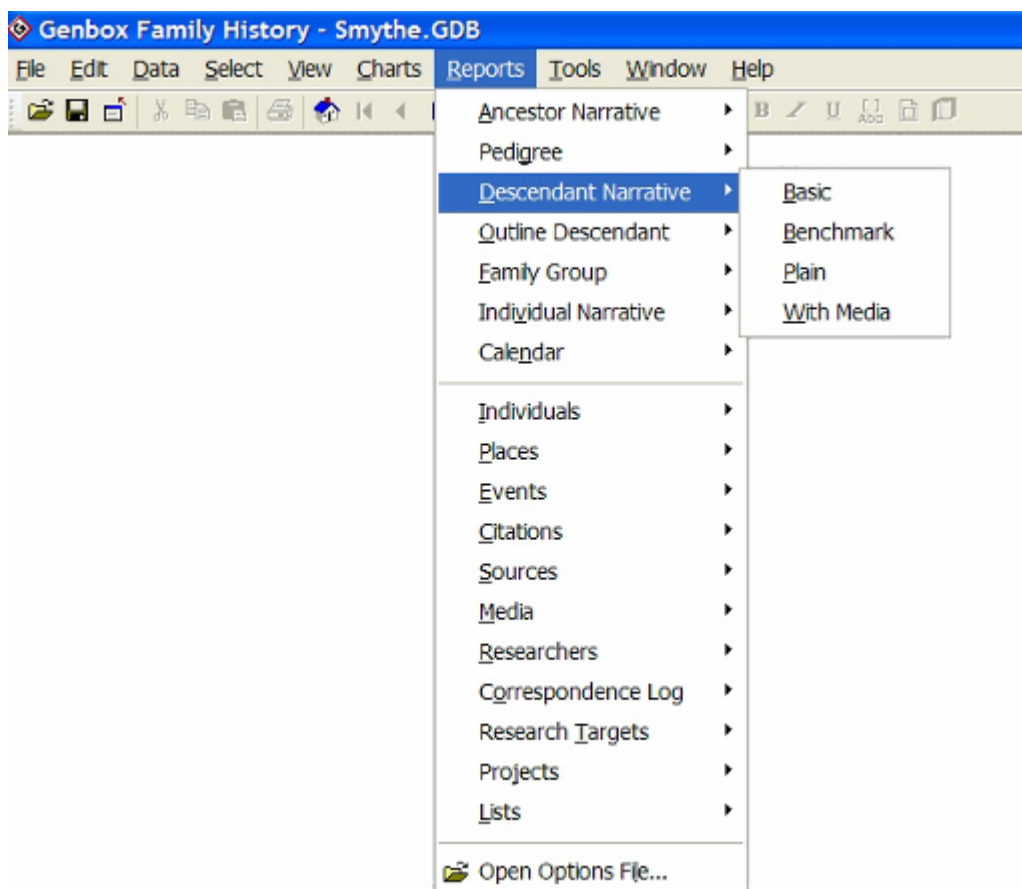
Click this menu option to choose an **Everyone Chart** options file from the submenu. The [Chart Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Chart** button to produce the chart.

Open File

Click this menu option to choose a chart options file with the [Open File Dialog](#). Chart options files have the extension .GCO. Select a chart options file and click **Open**. The [Chart Options View](#) will appear. You can view and change the options settings. When you are ready, click the **Make Chart** button to produce the chart.

Reports Menu

The **Reports** menu is used to select the options for report production. Genbox has default options for each report type. You can define your own options files and add them as submenu options on this menu. See the section [Charts and Reports Submenus](#).



Ancestor Narrative

Click this menu option to choose an **Ancestor Narrative Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Pedigree

Click this menu option to choose a **Pedigree Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Descendant Narrative

Click this menu option to choose a **Descendant Narrative Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Outline Descendant

Click this menu option to choose an **Outline Descendant Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Family Group

Click this menu option to choose a **Family Group Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Individual Narrative

Click this menu option to choose an **Individual Narrative Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Calendar

Click this menu option to choose a **Calendar Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Individuals

Click this menu option to choose an **Individuals Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Places

Click this menu option to choose a **Places Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Events

Click this menu option to choose an **Events Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Citations

Click this menu option to choose a **Citations Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Sources

Click this menu option to choose a **Sources Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Media

Click this menu option to choose a **Media Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Researchers

Click this menu option to choose a **Researchers Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Correspondence Log

Click this menu option to choose a **Correspondence Log Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Research Targets

Click this menu option to choose a **Research Targets Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Projects

Click this menu option to choose a **Projects Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Lists

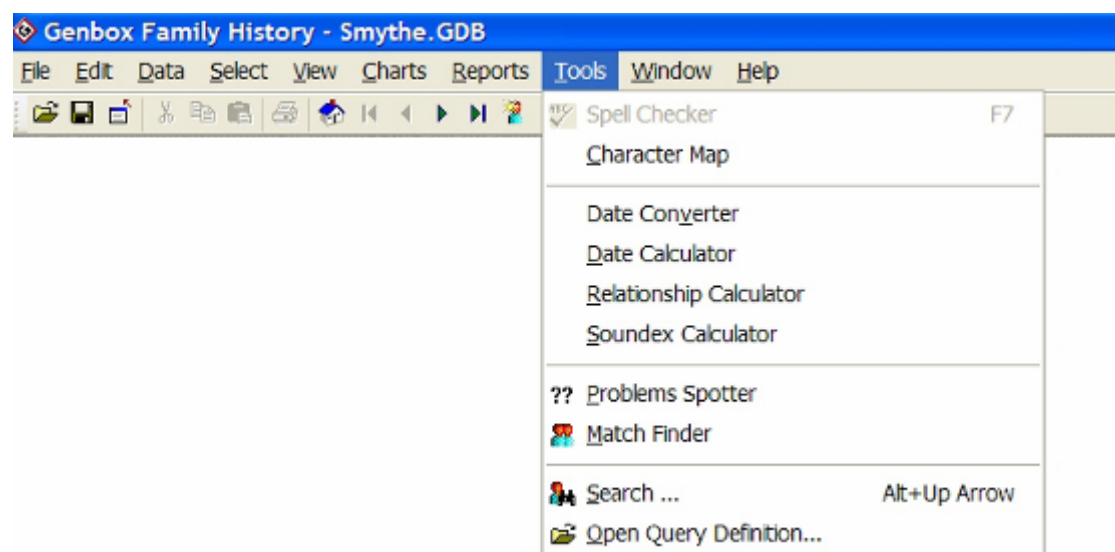
Click this menu option to choose a **Lists Custom Report** options file from the submenu. The [Report Options View](#) will open. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

Open File

Click this menu option to choose a report options file with the [Open File Dialog](#). Report options files have the extension .GRO. Select a report options file and click **Open**. The [Report Options View](#) will appear. You can view and change the options settings. When you are ready, click the **Make Report** button to produce the report.

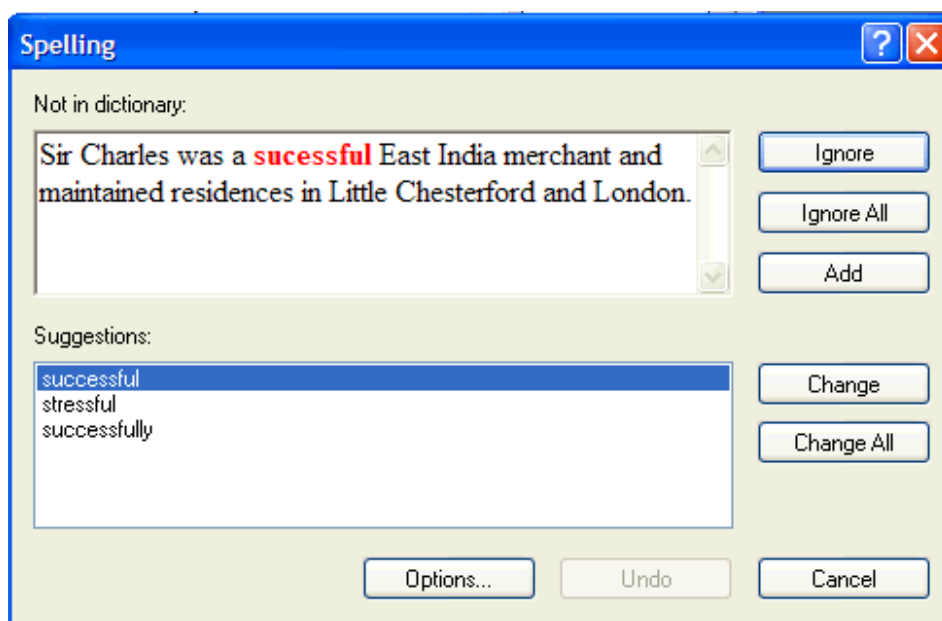
Tools Menu

The **Tools Menu** provides access to a number of useful utilities.



Spell Checker

The **Spell Checker Tool** can be used to check and correct the spelling of the words in any notes box. Words are checked against a main dictionary and a user dictionary. A number of options allow you to control the operation of the tool.



The Spell Checker Tool can be activated from a Notes box by pressing F7 or by selecting "Spell Checker" from the Tools Menu. It is also available as a function button on the [Magnify Notes View](#).

[General Options](#)

[Main Dictionary](#)

[User Dictionary](#)

[Common Misspellings](#)

When opened, the spell checker tool will stop on the first misspelled word. The sentence in which the word appears will appear in the top box. The misspelled word will be shown in red and bolded. Suggested correct spellings appear in the bottom box. The first suggestion will be highlighted by default.

Before the tool will continue to the next misspelled word, one of the following options must be selected.

Ignore

Click **Ignore** to skip the current word, leaving it unchanged.

Ignore All

Click **Ignore All** to skip the current word and all future occurrences of this same word, during the current spelling session.

Add

Click **Add** to insert the current word into the User Dictionary. Words in the User Dictionary are considered correct, so future occurrences of the same word will not be flagged as an error for the current spelling session and future spelling sessions.

Change

Click **Change** to replace the current word with the selected Suggestion. If the word you want to change to is in the suggestion list but is not currently selected, click on it first so that it is highlighted.

Change All

Click **Change All** when you want to perform **Change** on the current word and all future occurrences of the word during the current spelling session.

Cancel

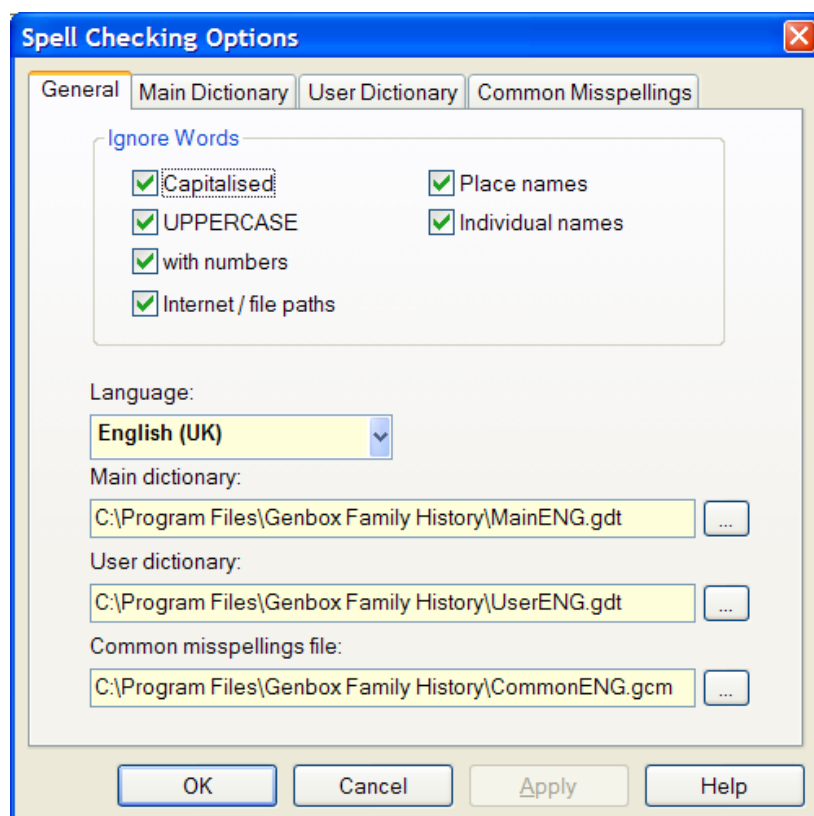
Click **Cancel** when you want to close the Spell Checker tool before making any spelling corrections. After corrections have been made, the label on this button will change to **Close**. Closing the spell checker tool will preserve the changes that have already been made.

Note The "Change All" function makes changes in sequence with normal processing. This means that if the window is closed before the entire text has been searched for misspelled words, not all occurrences of a "Change All" word may have been changed.

Editing the Text Directly

Instead of choosing one of the automatic options, you can click in the displayed text and correct the misspelled text manually. When finished, press the TAB key to continue the search for the next misspelled word.

Spell Checker General Options



Ignore capitalized words

When checked, all words beginning with a capital letter will be skipped.

Ignore words in UPPERCASE

When checked, all words appearing entirely in uppercase will be skipped.

Ignore words with numbers

When checked, all words containing the digits 0-9 will be skipped.

Ignore Internet and file paths

When checked, words containing one or more of "/" \ : @" (slashes, backslashes, colons, or ampersands) will be skipped.

Ignore place names

When checked, capitalized words that are place names in the current database will be skipped.

Ignore individual names

When checked, capitalized words that are individual names in the current database will be skipped.

Language

Use this selector to choose the language of the dictionary files:

English (US)
English (UK)

Your installation may have additional languages available.

Main dictionary, User dictionary, Common misspellings file

Enter the paths to the main dictionary file, user dictionary file, and common misspellings file in these boxes. Click on the "..." button for the File Open Dialog. The default path for all is the same directory in which Genbox was installed. The default extension is "gdt" for Genbox dictionary files, and "gcm" for Genbox common misspellings files.

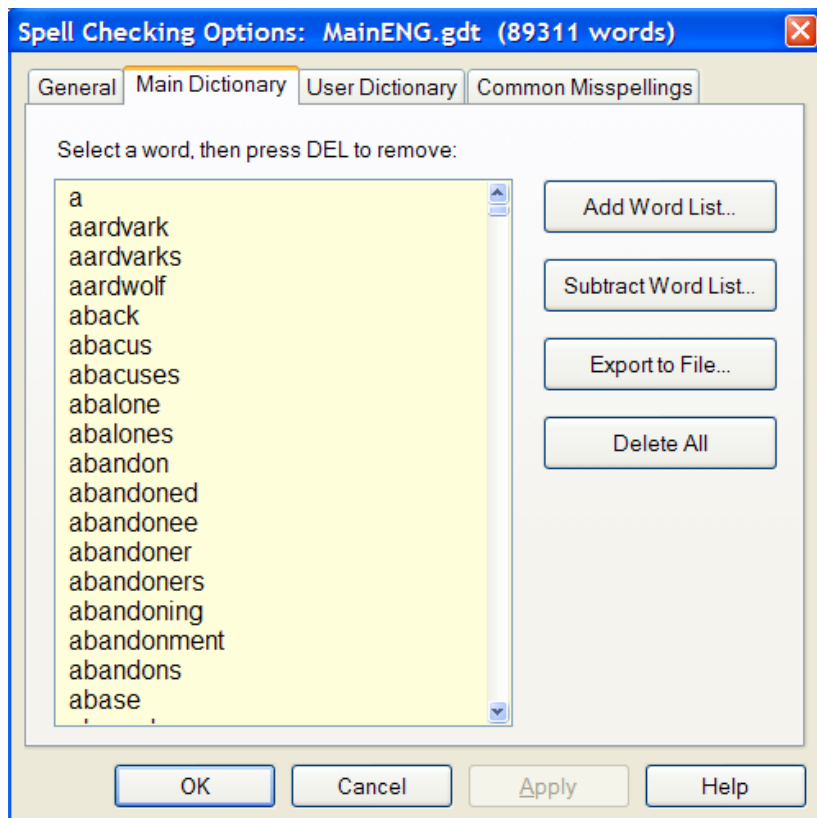
Default file names are:

	English (US)	English (UK)
Main dictionary file:	MainENU.gdt	MainENG.gdt
User dictionary file:	UserENU.gdt	UserENG.gdt
Common misspellings file:	CommonENU.gcm	CommonENG.gcm

A user dictionary is optional. If a file with the entered name does not exist, a new user dictionary file will be created.

The main dictionary can be viewed on the [Main Dictionary](#) page. The user dictionary can be viewed on the [User Dictionary](#) page. The common misspellings file can be viewed on the [Common Misspellings](#) page.

Spell Checker Main Dictionary



The **Main Dictionary** page lists words contained in the main dictionary file.

Add Word List

Words can be added to the main dictionary by clicking **Add Word List** and entering the name of a text file that contains a list of the new words. The file should have just one word per line. When the file contains abbreviations, such as "Mr.", be sure that they are each followed by an ending period. This informs the system that the word is actually an abbreviation, allowing it to mark abbreviations missing the ending period as a spelling error.

Words can also be added to the main dictionary by transfer from the user dictionary, by using the Merge with Main Dictionary button on the [User Dictionary page](#).

Subtract Word List

Words can be removed from the main dictionary by clicking **Subtract Word List** and entering the name of a text file that contains a list of the words to be removed. The file should have just one word per line.

Deleting Single Words

- To delete a single word from the main dictionary, click on the line containing the word, then press DEL.

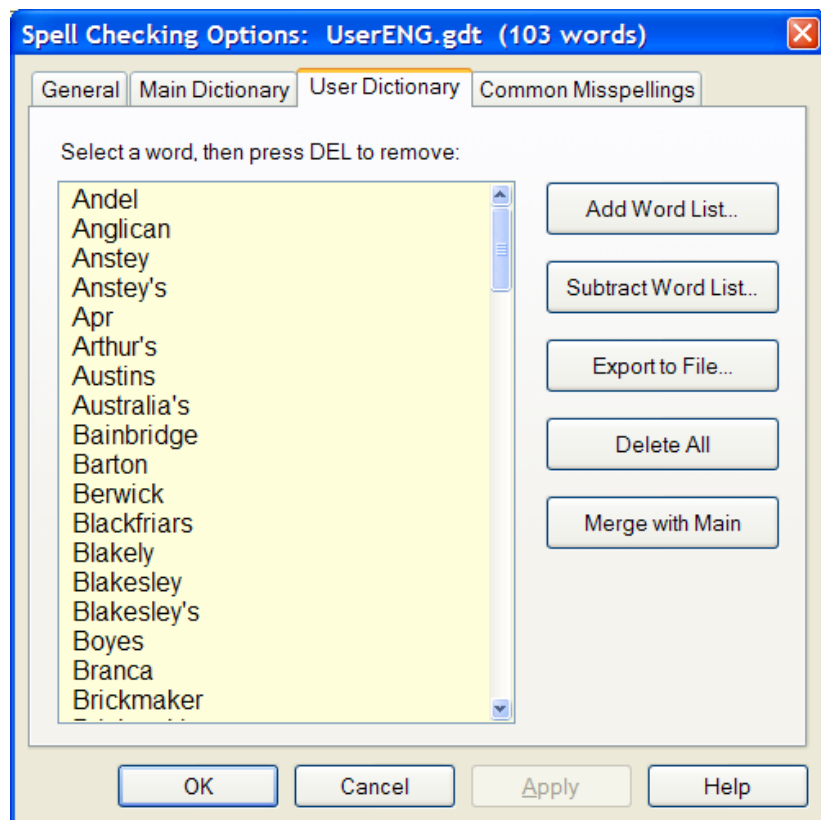
Delete All

To delete all words in the main dictionary, click **Delete All**. You may wish to do this prior to adding a new word list.

Export to File

The current list of words in the main dictionary can be saved to a text file by clicking **Export to File** and entering the name of the file.

Spell Checker User Dictionary



The **User Dictionary page** lists words contained in the user dictionary file. Words are automatically added to the user dictionary when the "Add" button is used while spell-checking.

Add Word List

Words can be added to the user dictionary by clicking **Add Word List** and entering the name of a text file that contains a list of the new words. The file should have just one word per line. When the file contains abbreviations, such as "Mr.", be sure that they are each followed by an ending period. This informs the system that the word is actually an abbreviation, allowing it to mark abbreviations missing the ending period as a spelling error.

Subtract Word List

Words can be removed from the user dictionary by clicking **Subtract Word List** and entering the name of a text file that contains a list of the words to be removed. The file should have just one word per line.

Deleting Single Words

- To delete a single word from the user dictionary, click on the line containing the word, then press DEL.

Delete All

To delete all words in the user dictionary, click **Delete All**. You may wish to do this prior to adding a new word list.

Export to File

The current list of words in the user dictionary can be saved to a text file by clicking **Export to File** and entering the name of the file.

Merge With Main Dictionary

Click this button to transfer the entire contents of the User Dictionary to the Main Dictionary. The User Dictionary will then be emptied.

Spell Checker Common Misspellings

Use this page to enter common misspellings and their corrections. This helps the spell checker make better suggestions; words found on this list will have their corrections shown higher in the list of suggestions.

Incorrect Spelling	Correct Spelling
Ameria	America
I'm	I'm
I;d	I'd
I;ll	I'll
UnitedStates	United States
abbout	about
abotu	about
abouta	about a
aboutit	about it
aboutthe	about the
absence	absence
acesories	accessories
accident	accident
accomodate	accommodate
accordingto	according to
across	across

Adding a Common Misspelling Entry

- To add an entry, type the incorrect spelling and correct spelling in the boxes at the top of the page.

Editing a Common Misspelling Entry

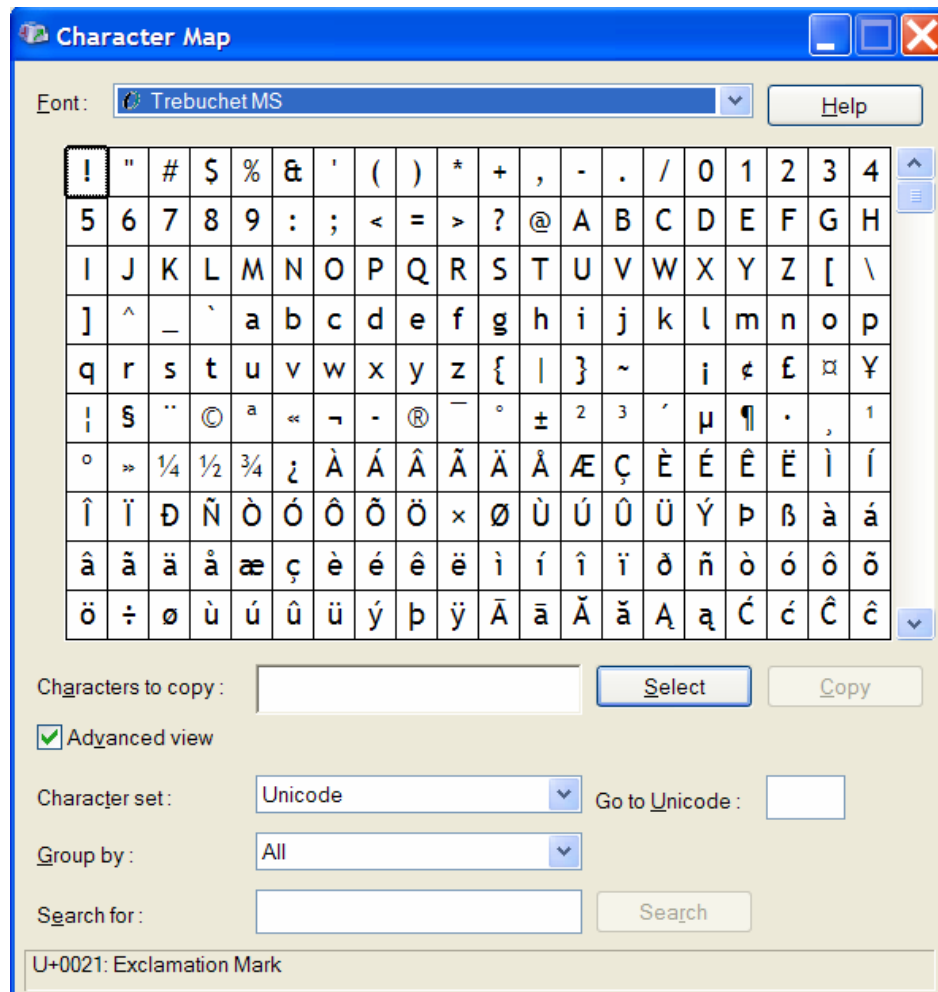
- To edit an entry, first click on the line containing the entry, then edit the incorrect spelling and correct spelling in the boxes at the top of the page.

Removing a Common Misspelling Entry

- To remove an entry, click on the line containing the entry, then press DEL.

Character Map

Click this menu option to open the system **Character Map Tool**. With this tool, you can easily select characters that are not available from the keyboard and insert them at the current text position.



Date Converter

The **Date Converter Tool** is selected from the **Tools** menu. This tool converts dates between five calendar systems: [Gregorian](#), [Julian](#), [Hebrew](#), [Islamic](#), and [Republican](#). Genbox uses the modern Gregorian calendar for its date storage. If you have a source document that uses dates in one of the other calendars, you can use this tool to find the equivalent date in the Gregorian calendar. Genbox will also automatically convert Hebrew and Republican calendar dates entered into an event date box when they can be identified by the month name.



	Day	Month	Year
Gregorian:	24	March	2005
Julian:	11	March	2005
Hebrew:	13	Adar Sheni	5765
Islamic:	13	Safer	1426
Republican:			

- **To use the Date Converter Tool**, enter the date that you want to convert into the appropriate calendar system boxes.
- The corresponding dates in the other calendar systems will be shown automatically once the year is entered.
- Negative year values indicate BC dates.
- The up-down spinners can be used to increment or decrement the corresponding numeric value.

Converting Julian (Old Style) Dates

The Julian dates shown are for the proleptic Julian calendar, using the modern system for year numbering and using January 1 as the first day of the year. If your source document is marked with a **double date** as in "11 Feb 1731/32", this indicates the recorder was using March 25 as the first day of the year, and you will need to add "1" to the resulting Gregorian year value shown:

- **To convert a Julian (Old Style) date to Gregorian**, enter the day, month, and year into the Julian date text boxes.
- The equivalent Gregorian date will automatically be computed and displayed.
- If the Julian date contains a double year value separated by a slash, enter the first year value only, then add one to the resulting Gregorian year shown.

For the Julian double date "11 Feb 1731/32", you would enter "11", "Feb", and "1731" into the Julian text boxes. The resulting Gregorian date shown will be "22 Feb 1731", but you need to add one to the year, so the final result is "22 Feb 1732". The reason you need to add one is because the date falls before March 25 in a country/region that was using March 25 as the first day of the year, so the equivalent year on the Gregorian will actually be one more than the value shown. For Julian dates on or after March 25, you do not need to add one to the resulting Gregorian year. Some countries started using January 1 as the first day of the year long before they switched to the Gregorian calendar; in those countries, the Julian conversion to Gregorian is correct as it is generated, for all months of the year. For more information on Julian dates, see the section on [Calendar Systems](#).

Note You may ask, why is it important to enter the **first** year of a double date, and add one to the resulting Gregorian year, rather than just entering the **second** year of a double date? While this method will nearly always work, it will fail on Julian leap days, because they are based on the first year in the pair. Otherwise, this shortcut can be used.

Date Calculator

The **Date Calculator Tool** is selected from the Tools menu. This tool is used to calculate the difference between two dates, or to calculate the date that is a certain interval after or before a given date.



1. **To calculate the difference between two dates**, enter the earlier date in the **First date** field.
2. Enter the later date in the **Second date** field.
3. Click the **Calculate** button. The difference in years, months, and days will be shown.

1. **To add an interval to a date**, enter the starting date in the **First date** field.
2. Enter the years, months, and/or days to add. The resulting date will immediately be shown in the **Second date** field.

Other useful notes about the Date Calculator:

- Negative interval values can be entered by using the "down" spinner button on each interval control.
- You can specify the interval as just a number of days; adding "1000 days" to a date will work.
- The tool remembers which two of the three entry sections (First date, interval controls, Second date) you most recently changed; the calculation will always be for the remaining section.
- All dates will be for the Proleptic Gregorian calendar.
- You can type "today" for a date field to load it with the current date.

Relationship Calculator

The **Relationship Calculator Tool** is selected from the Tools Menu. It is used to calculate the relationships, if any, between two individuals. Each relationship is listed on a new line in the **Relationships** list box.

The **Linkage** box displays a lengthier description of the currently selected relationship. It includes the common ancestors of the two individuals.

To calculate the relationships between two individuals:

- Enter the names of the two individuals into the **First person** and **Second person** boxes.
- The relationship will be shown automatically.

Blood Relationships Only

Normally, Genbox calculates both blood relationships and marital relationships. Click the **Blood relationships only** check box if you don't want the calculation to consider marriage links.

Swap Names

Clicking the **Swap Names** button will reverse the **First person** and **Second person** names, allowing you to see the relationship from the context of the second individual.

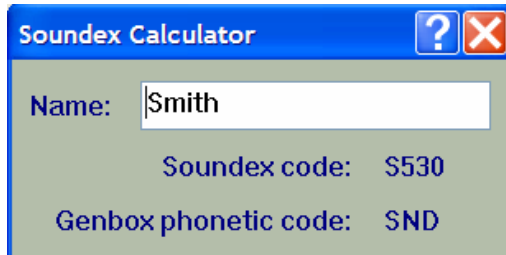
Lock Person

The Relationship Calculator can be left open while other views are used. When the current focus changes on the Individuals View or on a Chart View, the new focus individual will automatically be entered as the "unlocked" individual on the Relationship Calculator, and the relationships will be calculated automatically. This feature allows you to move through the database or the boxes on a chart, and see how other individuals are related to your locked individual.

You can control whether the relationships are shown from the viewpoint of your locked individual or from the viewpoint of the other individual. Suppose you want to see how everyone in the database is related to "Mary Jones". If you enter Mary Jones as the **First person**, and set **Lock person** to 1, then you will see results like "Mary Jones is the daughter of X", "Mary Jones is the aunt of Y", "Mary Jones is the mother of Z". If instead you enter Mary Jones as the **Second person**, and set **Lock person** to 2, then you will see results like "X is the mother of Mary Jones", "Y is the niece of Mary Jones", "Z is the child of Mary Jones".

Soundex Calculator

The **Soundex Calculator Tool** is selected from the Tools Menu. It allows you to compute the phonetic spellings of an entered name.



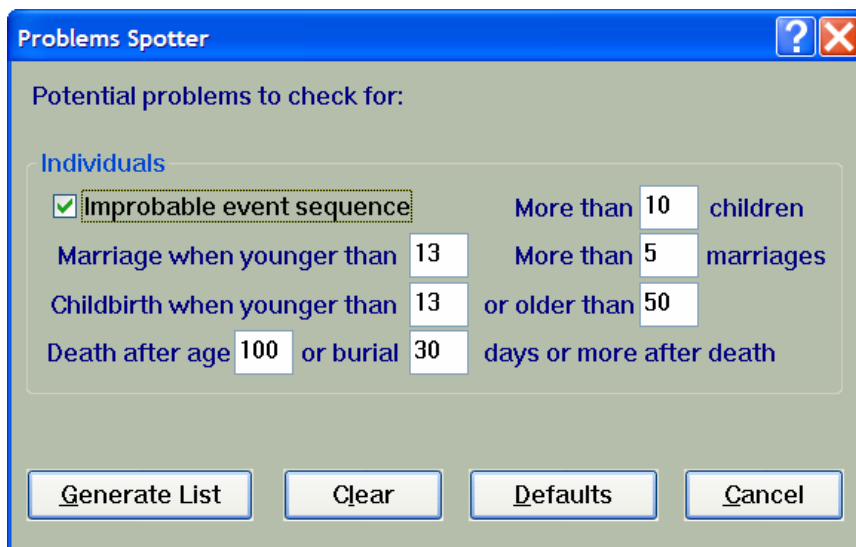
- **To use the Soundex Calculator Tool**, enter the name you want to process into the text box.
- The **Soundex** code and the Genbox phonetic code will be shown automatically.

The Soundex code is used in some document indexing systems. Knowing the Soundex code for a surname may be helpful in locating documents.

The Genbox phonetic code is used internally to enhance name searching capabilities. It provides a better phonetic equivalency than the Soundex code for most names. You may wish to use this coding with your own document filing system.

Problems Spotter

The **Problems Spotter Tool** is selected from the Tools Menu. It helps you locate possible irregularities in your data, which you may wish to investigate and correct. The results of this tool are saved to a list which you can view on the [List View](#).



Problems Spotter

Potential problems to check for:

Individuals

☒ Improbable event sequence More than 10 children

Marriage when younger than 13 More than 5 marriages

Childbirth when younger than 13 or older than 50

Death after age 100 or burial 30 days or more after death

Generate List Clear Defaults Cancel

Improbable Event Sequence

When **Improbable event sequence** is checked, individual that have living events after death or events before birth will be marked.

Marriage When Younger Than [13]

Individuals who have a marriage event when their age was younger than the specified value will be marked.

Childbirth When Younger Than [13] or Older Than [50]

Individuals who gave birth to a child when their age was younger or older than the specified values will be marked.

Death After Age [100] or Burial [30] Days or More After Death

Individuals who have a death event at an age greater than the specified value, or a burial event that is more than the specified number of dates after a death event, will be marked.

More than [10] Children

Individuals who are linked to more than the specified number of children will be marked.

More than [5] Marriages

Individuals who have more than the indicated number of marriages will be marked.

Generate List Button

When the **Generate list** button is clicked, the database will be processed, looking for data that could be a problem, according to the entered values. When a potential problem is found, it will be added to the **Potential Problems** list. Once processing is complete, the [List View](#) will be opened to display the results. Each entry on the List View will be shown on two rows:

- The first row will give the ID and name of the individual record with the problem.
- The second row will describe the nature of the problem.

Dividing lines will be shown between problem entries.

Clear Button

Click the **Clear** button to set all the parameter values to blank. Controls with a blank value will not be processed.

Defaults Button

Click the **Defaults** button to restore all the parameter values to their default values.

Skip Problems Check Flag

When the individual flag named "Skip Problems Check" (tag XPRB) has been marked for an individual, the Problems Spotter will not check the individual for problems. This flag can be set for individuals who were previously identified as having a problem but you have confirmed there is none.

Match Finder

The **Match Finder Tool** is selected from the Tools menu. It is used to find pairs (or larger groups) of individual records that potentially represent the same person. The results will be saved to the Possible Duplicates list. You can then compare the individual records in each group on this list, and make your own determination as to which are the same individual, and then merge their records together.

A number of match criteria may be specified to control the operation of the tool.

Key Individual or All

To find potential matches to a single individual, click the **Key individual** radio button and enter the name in the box. To find matches to all individuals in the database, click **All**.

Surnames and Given Names

Match conditions for **Surnames** and **Given names** can be set independently. Choices are:

(not evaluated)
Same first letters:
Phonetic match
Exact match

For **Same first letters**, enter the number of matching initial letters required in the adjacent box.

Birth Dates and Death Dates

Match conditions for **Birth dates** and **Death dates** can be set independently. Choices are:

(not evaluated)
Within years:
Within days:
Exact match

For the **Within years** and **Within days** choices, enter the required number in the adjacent box.

Parents

Choices for matching **Parents** are:

(not evaluated)
Phonetic, one pair
Exact match, pair
Phonetic, both prs
Exact, both pairs

Children

Choices for matching **Children** are:

(not evaluated)
Same number

Birth Places and Burial Places

Match conditions for **Birth places** and **Burial places** can be set independently. Choices are:

(not evaluated)
Same State/Prov.
Same County/Par.
Same City/Town
Exact match

Disqualify Pairs

Certain close relationships or data mismatches can be set to exclude possible matches:

- Parent and child
- Siblings
- Male and female

Treat a Blank Value as a Matching Value

When checked, missing data will be considered a good match to anything. Otherwise, missing data will cause the exclusion of potential matches.

Match When Ancestral File Numbers Match

When checked, a matching Ancestral File Number (AFN) will automatically generate a candidate pair, disregarding other match criteria.

Match When User ID Numbers Match

When checked, individual records with matching User ID values will be considered a match, disregarding other match criteria.

Generate List Button

When the **Generate list** button is clicked, the database will be processed, looking for individual match candidates, according to the entered values. When a potential match is found, it will be added to the **Possible Duplicates** list. Once processing is complete, the [List View](#) will be opened to display the results. Each entry on the List View will be shown on two or more multiple rows:

- The first row will give the ID and name of the first individual.
- The second row will the ID and name of the second individual.
- There can be more than two individuals in a group that match; if so, there will be additional lines for matching individuals.

Dividing lines will be shown between match candidate groups.

Clear Fields Button

Click the **Clear Fields** button to set all the parameter values to blank. Controls with a blank value will not be processed.

Defaults Button

Click the **Defaults** button to restore all the parameter values to their default values.

Search View

You can find individual records with a number of methods: you can type in the ID or name into the key fields on the header section of the [Individuals View](#); you can use the record movement buttons on the toolbar; you can use the [Individuals Pick Dialog](#). For a more sophisticated method, you can use the **Search View**. The Search View provides several pages of options for search criteria:

[Identifiers Page](#)

[Attributes Page](#)

[Events Page](#)

[Contact Page](#)

[Media Page](#)

[Notes Page](#)

[Match Page](#)

[Properties Page](#)

Selecting Match Individuals

The first six pages allow you to set match criteria for each of four **match individuals**. Each page has a section at the top containing four buttons.

- To Select a match individual, click the corresponding button (1-4). The options displayed at the bottom are those for the currently selected match individual.

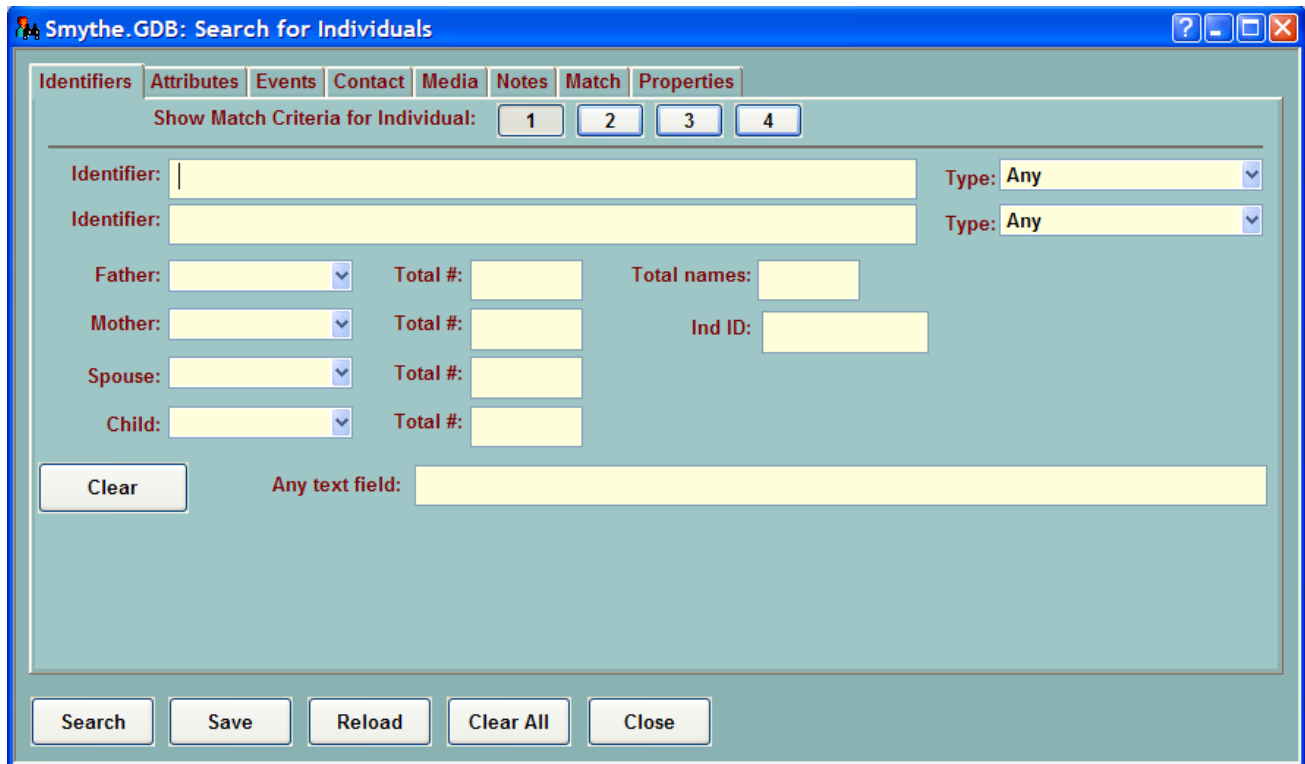
Buttons

There is a row of buttons at the bottom of the view.

- Click **Search** when you are ready to perform the query. The results will be saved to the **Query Results** list, which is visible on the [List View](#). The List View will be opened automatically to display the results.
- Click **Save** to save the query definition to a file. You can later reload this file to re-run the query.
- Click **Reload** to set all options back to what they were when the view first opened.
- Click **Clear All** to set all query conditions to blank.

Search View: Identifiers Page

The **Identifiers** page presents match criteria for identifiers.



Identifier Boxes

There are two **Identifier** boxes provided. You can use these to enter one or two **names** or **numeric identifiers**. If match conditions for two identifiers are entered, a successful match must satisfy **both** conditions.

You can enter a partial given name, surname, or full name; wildcards will be added automatically. A search on "**Pete**", for example, would match "Pete Smith", "Peter David Jones", and "Samuel Michael Peterson". A search on "**P J**" would match "Peter David Jones" and "Pamela Eugene Johnson".

You can use a forward slash character ("/") to mark the start of the surname portion of your match string. If no slash character is used to mark the surname portion, the match string is compared to both the full name and the given name of each record in the database. For the full name comparison, the last word of the match string will be considered the surname.

If you want to search on surnames beginning with "John" but don't want any matches to the given name "John", precede the portion that must match a surname with a slash character: **/John**.

If you are searching on a given name, such as "John", but don't want to see any surname matches, such as "Johnson", Put a slash after your match pattern: **John /**.

A wildcard is added after each "word" in the match string automatically. When you enter "**M C Smith**", Genbox adds wildcards so that it looks like "**M* C* Smith***". If you want to search on exactly what you enter without the default wildcards, enclose your search string in double quotes: "**M C /Smith/**". This would match only "M C Smith", it won't return "Michael Craig Smith" or "Mary Christine Smithers".

Note: surnames are stored delimited with forward slash characters; when searching on exact names, you will need to include them in your search string.

Identifier Type Selectors

There are two **Identifier Type Selectors**, one for each **Identifier** box. For example:

Any

Preferred
 prefix title
 birth name
 nickname
 married name
 name change
 name variant
 alias
 suffix title
 other name
 AFN
 National ID
 RFN
 SSN
 user ID
 AKA
 adopted name
 census name
 current name
 dit name
 farm name
 formal name
 formerly known as
 German name
 Hebrew name
 Indian name
 matronymic
 military name
 patronymic

Normally, you would leave the type selectors on their default value of **Any**. If a specific type is selected, the identifiers will be considered a match only when the type matches as well.

Father, Mother, Spouse, and Child Match Individuals

Queries can specify conditions for up to four match individuals. The **Father**, **Mother**, **Spouse**, and **Child** boxes each allow you to define a link to another match individual (1-4).

For example: Suppose you are looking for (1) someone named "Robert" who had (2) a father also named "Robert" and (3) a mother named "Susan", and (4) was married to someone named "Hannah". You would set criteria for four match individuals, each specifying a given name match. Then, for match individual 1, you would set the **Father** box to Individual 2, the **Mother** box to Individual 3, and the **Spouse** box to Individual 4. (You wouldn't set these boxes for other match individuals).

Totals

The **Total Number** boxes for **Father**, **Mother**, **Spouse**, **Child**, and **Names** allow you to specify how many links of the indicated type the match individual has.

Individual ID

The **Individual ID** box can be used to search for a particular individual ID. This criteria is generally most useful with comparison operators. For example, enter "> 500" to return all individuals with ID numbers greater than 500.

Any Text

You can search for text in any individual text field by typing it into the **Any text** box.

Clear Button

Click the **Clear** button to set all match criteria on this page to blank.

Search View: Attributes Page

The **Attributes** page presents match criteria for individual attributes.

The screenshot shows a software window titled "Smythe.GDB: Search for Individuals". It has a tabbed interface with tabs for Identifiers, Attributes (selected), Events, Contact, Media, Notes, Match, and Properties. Below the tabs, there's a section "Show Match Criteria for Individual:" with four buttons labeled 1, 2, 3, and 4. A "Total flags:" label is followed by a text input field. The main area contains several input fields: "Attribute type:" with a dropdown menu, "Attribute value:" with a text box, "Sex:" with a dropdown menu, and "Years since birth:" with a text box. To the right of these fields is a list of checkboxes for various flags: ANCI, Birthday List, DESI, Have Met, Holiday List, Living, Newsletter, Non-Relative, Problems, Recent, Reunion, and Skip Problems Check. A "Clear" button is located below the input fields. At the bottom of the window are five buttons: Search, Save, Reload, Clear All, and Close.

Attribute Type

Select the **Attribute type** from the drop-down list. Choices will be taken from the defined attributes in the database. For example:

A dropdown menu showing the following options: (Any), Caste Name, Description, Occupation, National Origin, Number of Children, Number of Marriages, and Religion. The "(Any)" option is currently selected and highlighted in blue.

Attribute Value

Type the **Attribute value** into this box. You can type just the first part of it.

Sex

Choices for sex:

A dropdown menu showing the following options: Male, Female, Unknown, and Other. The "Male" option is currently selected and highlighted in blue.

Years Since Birth

Years since birth is the number of years since the earliest birth date stored for an individual.

Total Flags

Enter the **Total number of flags** in this box.

Flags

You can select individual flags as match criteria by clicking on their check boxes.

Search View: Events Page

The **Events page** presents match criteria for events. Birth and event dates, total events, and detailed information about one event can be specified.

Smythe.GDB: Search for Individuals

Identifiers Attributes Events Contact Media Notes Match Properties

Show Match Criteria for Individual: 1 2 3 4

Birth date: Principal events:

Death date: Witnessed events:

Event: Principal: any

Date: Age:

Place:

Text:

Total witnesses:

Clear

Search Save Reload Clear All Close

Birth Date and Death Date

Enter the **Birth date** and/or **Death date** in these boxes. You can specify a full date, a single year, a range of years, or a range of dates. If only a year is entered, all dates occurring during the indicated year will be considered matches. If only a month and year are entered, all days of that month will be considered matches.

Total Principal Events

Enter the total number of event records where the individual was a principal (primary, spouse, other/child) required for a match.

Total Witnessed Events

Enter the total number of witnessed event records required for a match. For example, enter "> 0" to find all individuals that are listed as witnesses.

Event Type

The remaining fields on the page all work together to define a single event record. The **Event type** is the type for this event record.

Principal

The **Principal** Selector has the following choices:

any
Parent
Primary
Spouse
Other/child

When **any** is selected (the default), any principal linked to the event will be considered for a match. This means if the event is a "Birth" event, the match could return up to the three people: the child, father, and mother. If you want the match to return just the child, set the **Principal** Selector to "Other/child".

"Parent" means "Primary or Spouse".

Date

Enter a date for the event. You can specify a full date, a single year, a range of years, or a range of dates.

Age

Enter an age for the primary individual at the time of the event.

Place

Enter a place for the event.

Text

Enter the extra text for the event.

Secondary Link

You can specify that another match individual should also be linked to this event record. There are two selectors that work together for this feature. The first selector provides these choices:

Parent:
Primary
Spouse:
Other:
Witness:

The second selector provides a choice of match individual (1-4):

Individual 1
Individual 2
Individual 3
Individual 4

Total Witnesses

Enter the total number of witnesses for the event. For example, enter "> 0" to find all individuals that were principals in events that had witnesses.

Search View: Contact Page

The **Contact page** presents match criteria for contact information. The fields are the same as those on the [Individuals View: Contact page](#).

The screenshot shows a software window titled "Smythe.GDB: Search for Individuals". It features a tabbed interface with tabs for Identifiers, Attributes, Events, Contact (selected), Media, Notes, Match, and Properties. Below the tabs, there is a section labeled "Show Match Criteria for Individual:" with four numbered buttons (1, 2, 3, 4). The main area contains various input fields: "Group name:", "Mailing name:", "Address 1:", "Address 2:", "Place:", "Postal code:", "Phone:", "Fax:", "E-Mail:", and "Web:". To the right of these fields are checkboxes for "Preferred" and "Historical", and a "Type:" dropdown menu. A "Total #:" field is also present. At the bottom left is a "Clear" button, and at the bottom right are buttons for "Search", "Save", "Reload", "Clear All", and "Close".

Search View: Media Page

The **Media page** presents match criteria for linked multimedia.

The screenshot shows a software window titled "Smythe.GDB: Search for Individuals". It has a menu bar with "Identifiers", "Attributes", "Events", "Contact", "Media" (selected), "Notes", "Match", and "Properties". Below the menu bar is a section "Show Match Criteria for Individual:" with four buttons labeled "1", "2", "3", and "4". The main area contains several input fields: "Media for:" with a dropdown menu showing "Individual"; "Total media:" with a text box; "Ref. name:" with a text box; "File name:" with a text box; "Type:" with a dropdown menu; "Format:" with a text box; "Modified:" with a text box; and "Quality:" with a dropdown menu. At the bottom left is a "Clear" button. At the bottom of the window are five buttons: "Search", "Save", "Reload", "Clear All", and "Close".

Media for Data Type

You can limit the media matching to media linked to a particular type of data. Choices are:

Individual
Family
Events
Any

Total Media Links

Enter the **total number of media links** required.

Reference Name

Enter the **Reference name** for the media.

Filename

Enter the **Filename** for the media.

Media Type

Select the **Media type** required:

Unknown
Image
Audio
Video
URL
Object

Format

Enter the **Media format** required.

Modified

Enter a date specification for the last modified date.

Quality

Select a quality value (Poor, Fair, Good, Excellent):

Poor
Fair
Good
Excellent

Search View: Notes Page

The **Notes page** presents match criteria for general and research notes, and source citations.

The screenshot shows a software window titled "Smythe.GDB: Search for Individuals". It has a menu bar with "Identifiers", "Attributes", "Events", "Contact", "Media", "Notes" (selected), "Match", and "Properties". Below the menu bar is a section "Show Match Criteria for Individual:" with four buttons labeled "1", "2", "3", and "4". The "Notes" section contains a "Notes:" label, a "Note for:" dropdown menu set to "Individual", a "Type:" dropdown menu set to "Any", a "Total notes:" text box, and a "Clear" button. Below this is a "Containing text:" text box. The "Citations:" section contains a "Source:" text box, a "Where in Source:" text box, a "Lead Text:" text box, an "Annotation:" text box, a "Rationale:" text box, and a "Total Citations:" text box. At the bottom of the window are five buttons: "Search", "Save", "Reload", "Clear All", and "Close".

Note for Data Type

You can limit the note matching to notes for a particular data type. Choices are:

Individual
Identifier
Parents link
Family
Event

Note Type

The **Note type** choices are:

Any
General
Research

Total Notes

Enter the total number of notes of all types.

Note Text

Enter a portion of the text. Wildcards will be added automatically both before and after the portion entered.

Total Citations

Enter the total number of source citation links.

Source

Enter the name of the source. This is an auto-completion field; if no source is found matching what you type, the field will be set to blank when you move out.

Where In Source

Enter a portion of text that should appear in the "Where in Source" field.

Lead Text

Enter a portion of text that should appear in the Lead Text.

Annotation

Enter a portion of the text that should appear in the Annotation.

Rationale

Enter a portion of the text that should appear in the Rationale.

Search View: Match Page

The **Match page** controls how the criteria for the four match individuals are combined and used.

The screenshot shows the 'Smythe.GDB: Search for Individuals' window with the 'Match' tab selected. The 'Match Conditions' section contains four dropdown menus for 'Ind 1', 'Ind 2', 'Ind 3', and 'Ind 4', all set to 'Match when found'. Below this is a table with columns: Individual, Verb, Relationship, and Individual / List. The table is currently empty. At the bottom, there is a 'Return Results For:' section with radio buttons for 'Ind 1' (selected), 'Ind 2', 'Ind 3', and 'Ind 4'. A 'Defaults' button is also present. At the very bottom are buttons for 'Search', 'Save', 'Reload', 'Clear All', and 'Close'.

Match Conditions

For Individual 1 through Individual 4, you can set the **Match conditions**. Choices are:

Disable
Match when found

Setting a match individual to **Disable** is any easy way to limit the query for test purposes. With some of the match individuals disabled, you can run the query and check the results against the criteria for the remaining match individuals.

Relationship List Box

The [Identifiers Page](#) allowed you to specify certain relationships between match individuals, such as **Father** and **Spouse**. With the **Relationship** list box, you can specify more complex relationships. The list box has four columns: **Individual**, **Verb**, **Relationship**, **Individual / List**.

Individual Column

Specify the first individual in the match relationship in the **Individual** column. Choices are Individual 1 - 4.

Verb Column

The **Verb** choices are "Is" and "Is NOT". You can use the "Is NOT" setting to specify when two individuals should NOT have a certain relationship.

Is
Is NOT

Relationship Column

The **Relationship** column specifies the required relationship between the two match individuals. Choices are:

the Same as
a Father of
a Mother of
a Parent of
a Grandparent of
an Ancestor of
a Descendant of
a Child of
a Grandchild of
a Spouse of
a Sibling of
Contemporary to
in List

Individual/List Column

Specify the second individual in the match relationship in the **Individual/List** column. Choices are:

Individual 1
Individual 2
Individual 3
Individual 4

When the **Relationship** column specifies "In List", the **Individual/List** column will display the names of saved lists to choose from. You can even select "Query Results" as the list, which makes it possible to base the results of a new query on the results of the previous query.

Returning Results

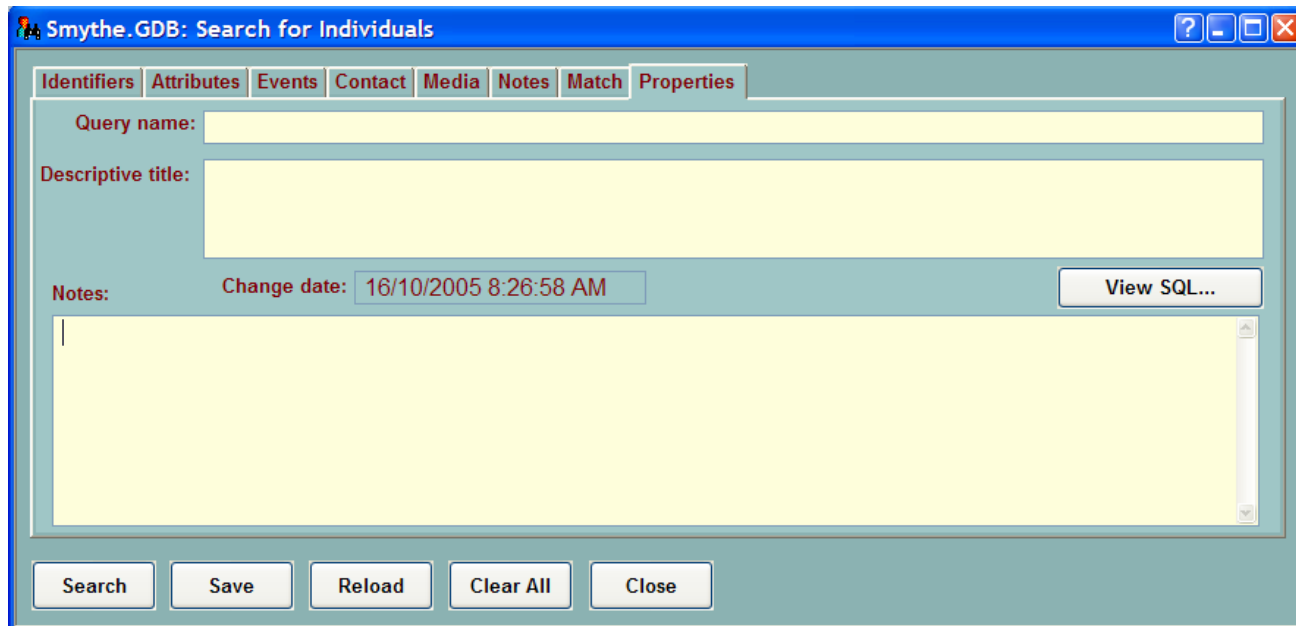
While there are four match individuals, the **Results** can only come from one set of matching individuals. The default is Individual 1. Click one of the other radio buttons to change where the output is coming from. This option is useful when you are testing a complex query and want to see which individuals are matching in a different set.

Defaults Button

Click the **Defaults** button to reset all fields on this page to their default values.

Search View: Properties Page

The **Properties** page provides data fields to store descriptive information about the query, which is useful for queries that will be saved and reloaded later.



Query Name

Type a name for the query.

Descriptive Title

Type a descriptive title for the query.

Change Date

The **Change date** box displays the date and time the query was last modified. This box is read-only.

Notes Box

Enter your notes about the query in the **Notes** box. Queries can be complex and it is often not obvious what the intent of the query is. If you take the time to describe why you created the query, what it does, and where and when it is used, you will be thankful later.

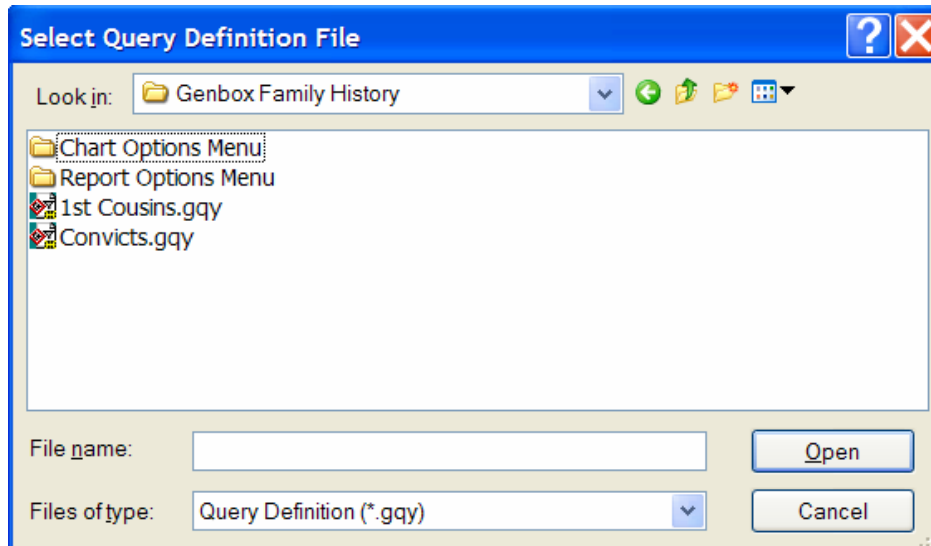
View SQL Button

The options entered on the pages of this view are converted into an SQL statement that is used to perform the query. Click the **View SQL** button to see the SQL command that will be performed when the **Search** button is clicked. If you have some knowledge of SQL, you can often scrutinize the SQL statement to determine why something is not working as you thought it would.

This view is read-only.

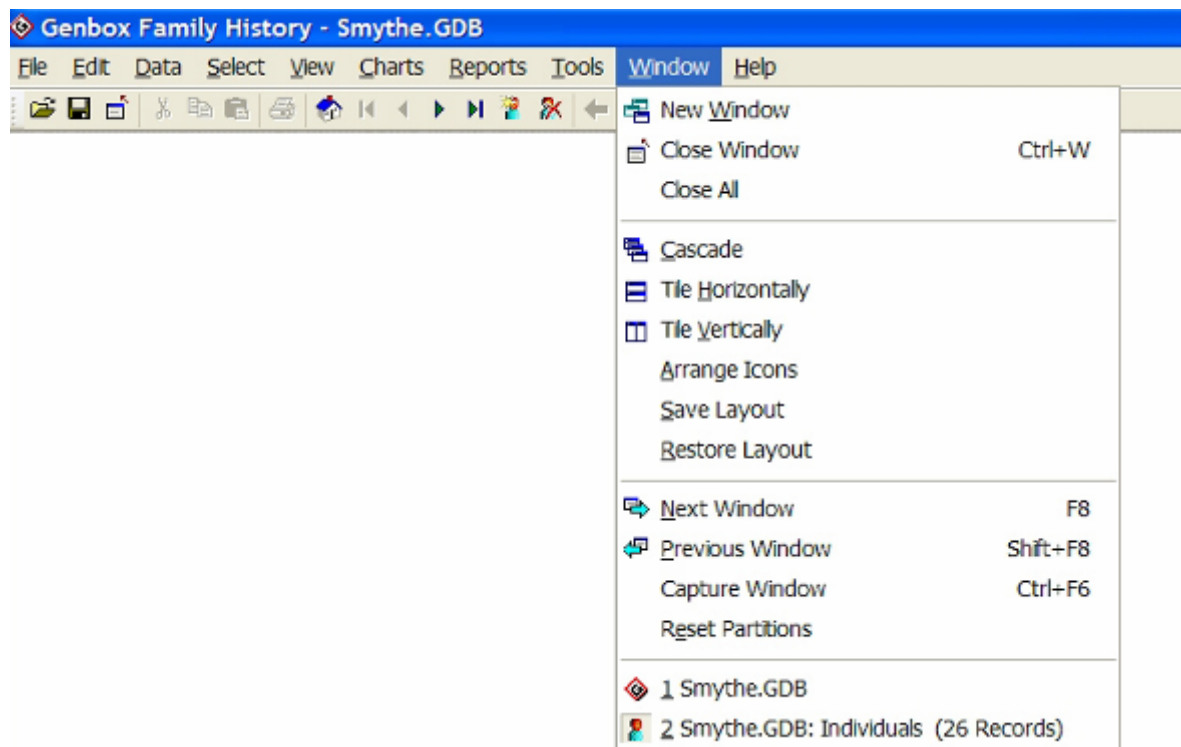
Open Query Definition

Click this menu option to open a saved query definition file. The [Open File Dialog](#) will open. Saved query definitions have a file extension of .GQY. Select a query definition file and click **Open**. The [Search View](#) will appear. You can view and change the options settings. When you are ready, click the **Search** button to perform the search.



Window Menu

The **Window** menu contains options for manipulating the windows in Genbox.



New Window

Click this menu option to open another window of the same type as the current window.

Close Window

Click this menu option or toolbar button to close the current View Window. The next view window in the "stacking order" will become active. Selecting this option again will close that window as well. Repeated clicking on this option will close all view windows.

Close All

Click this menu option to close all open windows and databases.

Cascade

Click this menu option to arrange the open windows in a **cascade**. Each window will overlap the previous one, offset slightly to the right and down.

Tile Horizontally

Click this menu option to arrange the open windows horizontally. No windows will overlap.

Tile Vertically

Click this menu option to arrange the open windows vertically. No windows will overlap.

Arrange Icons

Click this option to arrange the icons of the closed windows on the Genbox work area.

Save Layout

When this option is selected, you will be prompted if you want to save the current configuration of windows as the standard layout. Genbox uses this saved layout of active views when it opens a database. The default layout shows the Individuals View.

To use this feature, first open the views that you prefer to see each time you open a database. Size and position them on the screen as you like. Finally, choose this menu option.

To restore the default window layout, close all view windows (except the Database View), then choose this menu option.

Next Window

Click this menu option to move to the next open window.

Previous Window

Click this menu option to move to the previous open window.

Capture Window

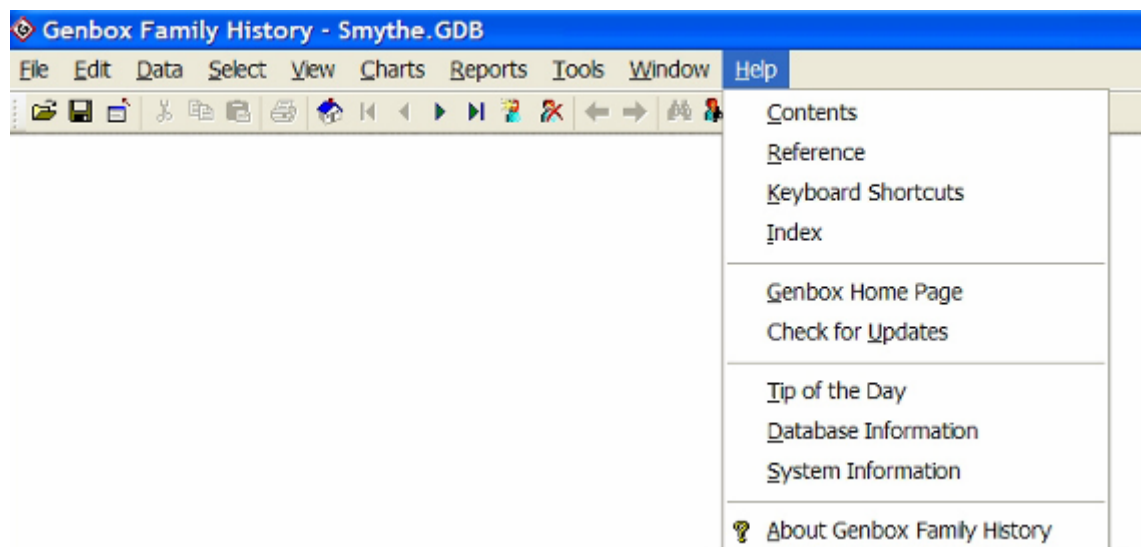
Click this menu option to capture an image of the active view window. The File Open Dialog will appear. You can save it in BMP, JPEG, or PNG format. A copy is also placed on the clipboard, where it is available for other applications to paste. You can use this function to provide a reference picture when submitting a problem report, feature suggestion, or question to customer support.

Note You can also use the keyboard shortcut CTRL+F6.

Reset Partitions

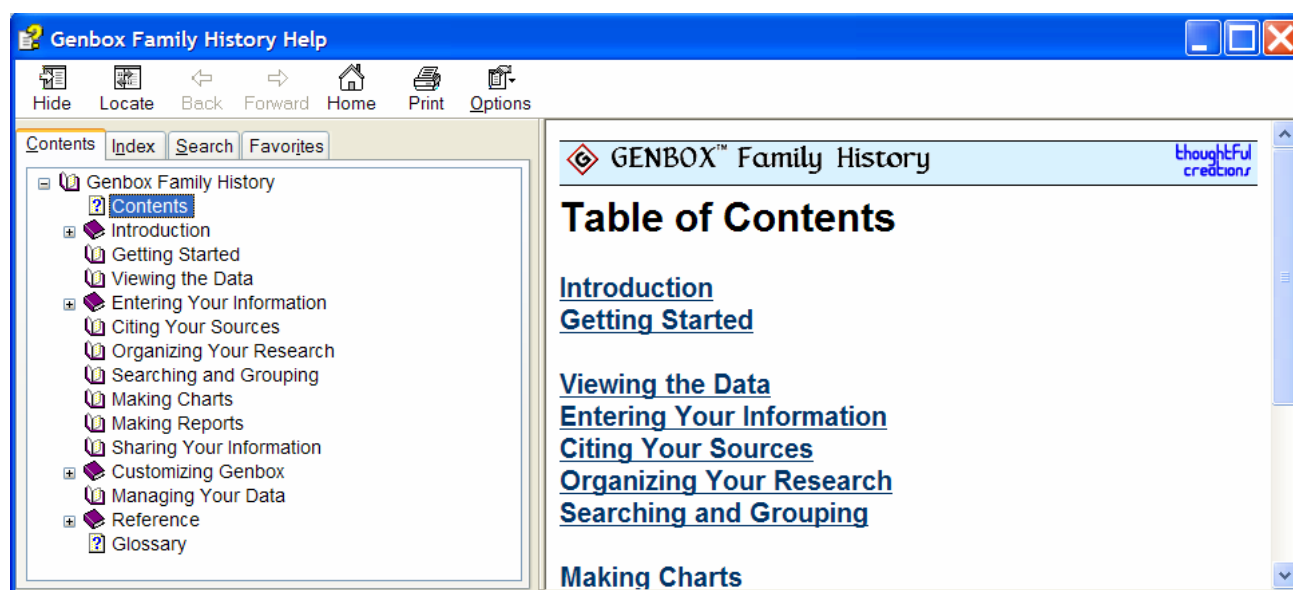
Click this menu option to reset the splitter bars and list box column widths on the active window pane to their default positions.

Help Menu



Contents

Click this menu option to open the **Genbox Help Window**. The Contents pane will be shown, where you can select a help topic. Complete help is available on Genbox.



Reference

Click this menu option to open the **Genbox Help Window**, with the Reference section displayed.

Keyboard Shortcuts

Click this menu option to open the **Genbox Help Window**, with the Keyboard Shortcuts section displayed.

Index

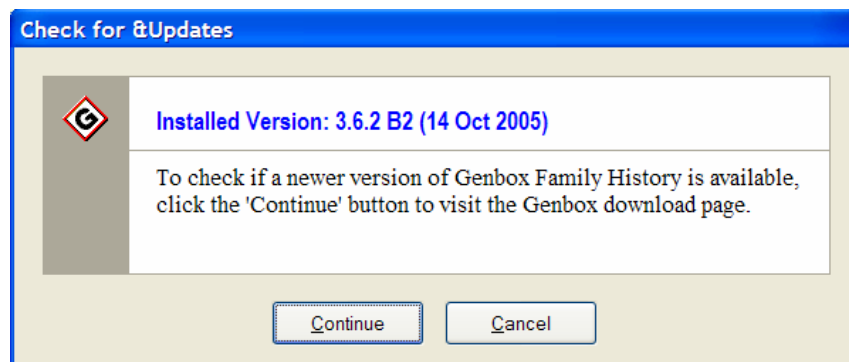
Click this menu option to open the **Genbox Help Window**. The Index pane will be shown, where you can type in a keyword.

Genbox Home Page

Click this menu option to go online to the home page for Genbox Family History, <http://www.genbox.com>. A connection to the internet must be established first.

Check for Updates

Click this menu option to see if a newer version of Genbox Family History is available for download. First, the installed version number is displayed. Then, a link is provided to the Genbox download page, <http://www.genbox.com/download.htm>, where you can compare the current version number to see if a newer version is available.

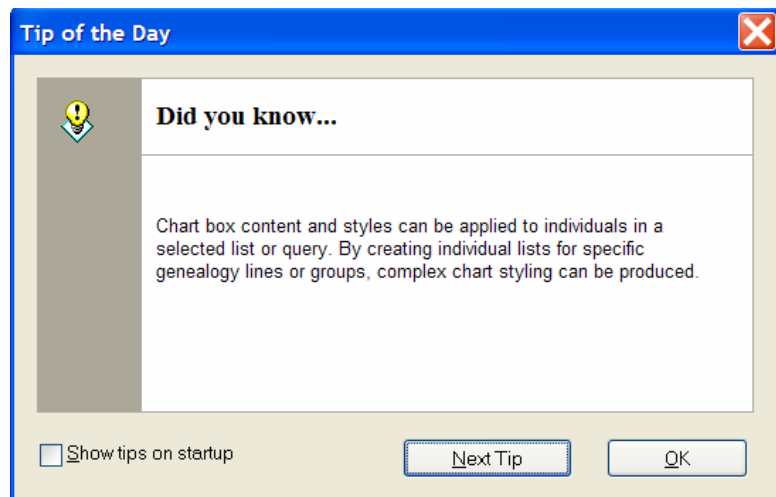


If a newer version is available, you can download the new version and follow its installation instructions to update your copy of Genbox.

Note: A connection to the internet must be established before visiting the download page.

Tip of the Day

Click this menu option to open the **Tip of the Day Dialog**.

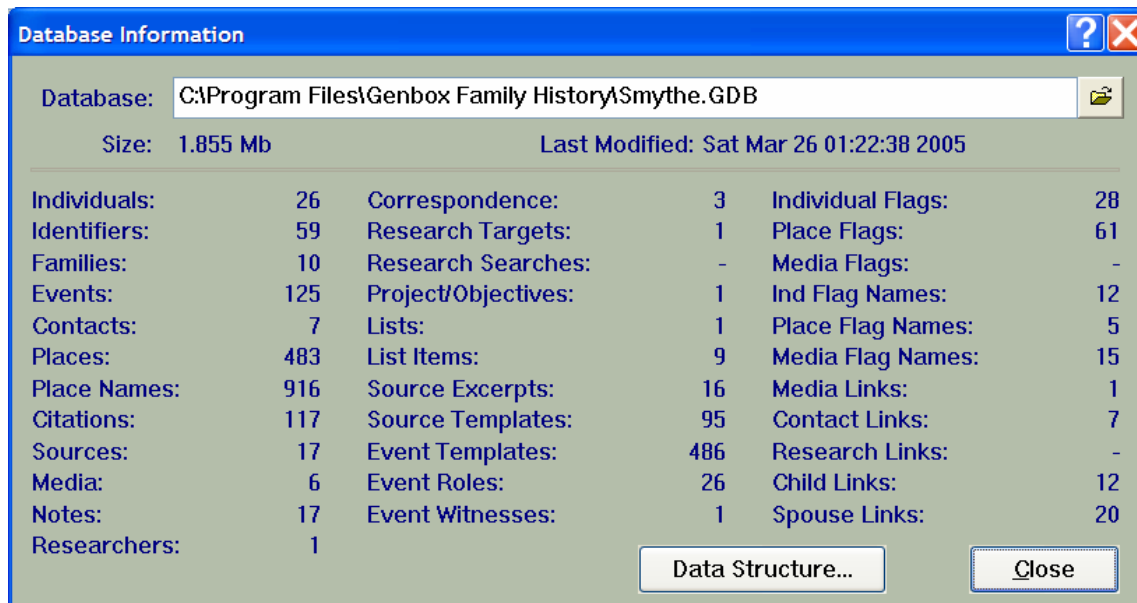


The **Tip of the Day Dialog** is part of the Genbox Help System. Helpful tips for using Genbox are presented, one at a time. Click the **Next Tip** button to see another tip. Click the **OK** button to close the window.

If you want to see a tip each time Genbox is started, click the **Show tips on startup** check box.


Database Information

Click this menu option to open the **Database Information Dialog**. It displays status information about the current database or another database.



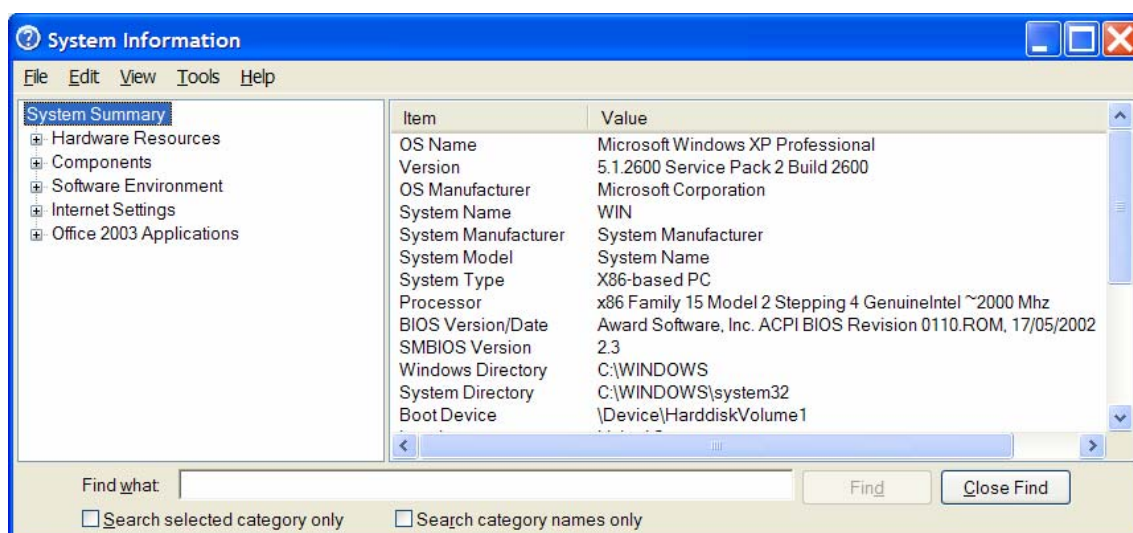
The **Database Information Dialog** presents status information on the current database or another database. When first opened, information on the current database is presented:

- Full path name
- Total size of the database, in megabytes (Mb)
- Date and time of last modification (system date format)
- Number of records in each table

You can view status information on another database by clicking the **Open File** button  and selecting it from the [Open File Dialog](#).

System Information

Click this menu option to open the **System Information Dialog**.



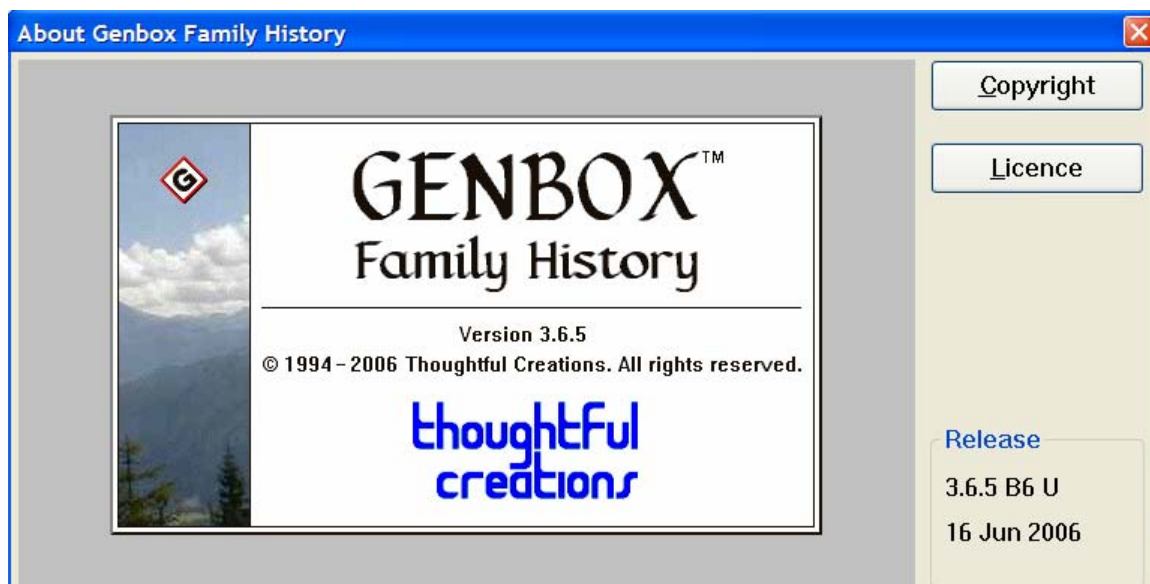
The **System Information Dialog** displays detailed information about your computer system, including:

- Hardware resources (conflicts/sharing, DMA, forced hardware, I/O, IRQs, memory)
- Components (multimedia, display, ports, storage, printing, problem devices, etc.)
- Software environment (drivers, OLE registration, software updates)

The dialog can be selected from the Help Menu, System Info option. It can also be selected by clicking the **System Info** button on the About Genbox Dialog below.

About Genbox Family History

Click this menu option to open the **About Genbox Dialog**.



The **About Genbox** dialog displays the program version number, release date, licensed user name, registration number, and a number of buttons.

Click the **System Info** button to open the **System Information Dialog**. This is the same as clicking the Help Menu: System Information menu option.

Click the **Copyright** button to review copyright information and acknowledgements.

Click the **License** button to review the Genbox software license.

How to Register










Click this menu option to open the **How to Register Genbox** dialog window. It explains the registration process and provides a link to the Genbox registration page.

Enter Registration Information

Click this menu option to open the **Enter Registration Information** dialog window. After you register Genbox, enter your registration information here to enable all features of the program.

Chart Popup Menu

The **Chart Popup Menu** appears when you right-click on a chart displayed on the [Chart View](#).

 U ndo	Ctrl+Z
 Cu t	Ctrl+X
 C opy	Ctrl+C
 P aste	Ctrl+V
 D elete	Del
S elect A ll	Ctrl+A
Hide Leaves	
Hide Side Spouses	
Make Frame Snug	
Reorganise Chart	
 F ind...	Ctrl+F
Find A gain	F3
Find R everse	Shift+F3
 J ump to Individual	DbkClk
 J ump B ack	
 J ump F orward	
Chart Properties...	
H elp	F1
O bject	

Hide Leaves

Sometimes it is helpful in understanding the link structure of a complex chart to be able to "strip away" the "leaf" boxes. A leaf box is a box with no descendants, no marriage links, and no attached boxes (attached boxes include media boxes, annotations or lines).

- **To hide all the leaf boxes on the chart**, choose "Hide Leaves" from the right-click popup menu.

This operation can be performed repeatedly, each time removing the boxes that became leaves after the previous set of removals.

Hide Side Spouses

A "Side Spouse" box contains the name of a spouse (husband or wife) of the primary individual, which is in a separate box. The spouse box appears to the left or ride side of the primary box, and is linked with a marriage connector. Side spouse boxes are common when the Layout option "Single Box for Couples" is set to "No".

- **To hide all the (open) side spouse boxes on the chart**, choose "Hide Side Spouses" from the right-click popup menu.

When the "Hide Side Spouses" option is selected, spouse boxes with no ancestors/children are removed from chart. By repeatedly using this option and the "Hide Leaves" option, it is possible to whittle a chart down to just the family link connections. This may help you determine the underlying structure of the chart.

Make Frame Snug

Fan Charts

A fan chart is initially drawn with space for the full portion of a circle selected-- either 90, 180, or 360 degrees. Depending on the actual data selected for output, there may be portions of this reserved area that are blank. A more appealing chart can be produced by "closing up" this unused space between the actual chart and the frame. To do this, right-click on the fan chart and choose the option **Make Frame Snug**.

Rectangular Charts

For rectangular charts, the chart frame will resize automatically in most cases, whenever an edge box is resized, moved, or deleted. You can choose **Make Frame Snug** from the right-click menu in case the automatic resizing does not occur.

Reorganize Chart

After a chart has been edited and a number of boxes have been deleted, there will be gaps, or "holes", between the remaining boxes. This space can be closed up by reorganizing the chart with just the remaining boxes. This operation is not performed automatically after a box deletion, because you may want to preserve your custom positioning on other parts of the chart that you have already edited.

- **To reorganize all the boxes on the chart**, choose "Reorganize Chart" from the right-click popup menu.

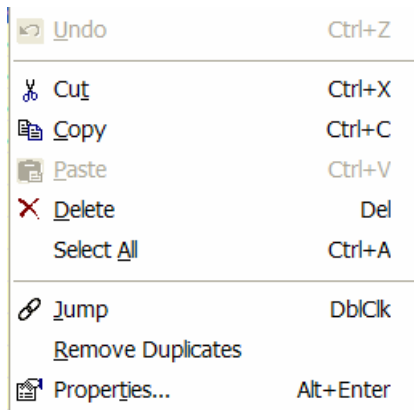
Note: any custom box positioning will be lost by this operation.

Find Reverse

Clicking **Find Reverse** is like clicking Find Again to repeat the previous [Find Dialog](#) operation, except the direction of the search is reversed. You can use **Find Again** to move forward 3 times, and then use **Find Reverse** 3 times to return to your starting position. You can also press CTRL+R for this option.

Data List Popup Menu

The **Data List Popup Menu** appears when you right-click on a list item on the [List View](#).









Remove Duplicates

Click this menu option to remove duplicate list members from the current list.

Data Tree Popup Menu

The **Data Tree Popup Menu** appears when you right-click on a tree item on the [List View](#).





 <u>Undo</u>	Ctrl+Z
 <u>C</u> ut	Ctrl+X
 <u>C</u> opy	Ctrl+C
 <u>P</u> aste	Ctrl+V
 <u>D</u> ele t e	Del
<u>R</u> ename	Ctrl+R
Cr <u>e</u> ate <u>N</u> ew List	
 <u>P</u> roperties...	Alt+Enter

Create New List

Click this menu option to create a new list. The new list will initially be named "NewList", unless that name is already used, in which case the new list will be named "NewList1". It will appear in the **Saved Lists** section of the hierarchy. It will initially have no members.

Text Box Popup Menu

The **Text Box Popup Menu** appears when you right-click on a text box. Many of these menu options are also available on the [Edit Menu](#) or the [Select Menu](#).

 <u>Undo</u>	Ctrl+Z
 <u>Cu</u> t	Ctrl+X
 <u>C</u> opy	Ctrl+C
 <u>P</u> aste	Ctrl+V
 <u>D</u> elete	Del
<u>S</u> elect <u>A</u> ll	Ctrl+A
 <u>J</u> ump to Father	DbClk
 <u>J</u> ump to Citations	F4
 <u>J</u> ump <u>B</u> ack	
 <u>J</u> ump <u>F</u> orward	
 <u>M</u> agnify	
<u>M</u> ark/Unmark Father	
 <u>I</u> nsert Field Code...	Ctrl+D
<u>S</u> ort...	
 <u>P</u> ro <u>p</u> erties	Alt+Enter
<u>H</u> elp	F1

Mark/Unmark [Data Type]

Click this menu option to mark or unmark the current data item. Marked items can appear with special font styles, such as a different color, bolding, and italics. When clicked, the mark status will be reversed: the data will be marked if it was unmarked, otherwise the marking will be cleared.

Main Toolbar



The main toolbar is displayed just below the menu bar. It provides easy access to common application operations. Many of these functions can also be selected from the menus.

Rich Text: Bold



Click this toolbar button to set **bold style** for the selected text or for newly typed text in a notes box that you wish to emphasize. If the selected text is already bold, pressing this toolbar button will remove the style instead. The button face will have a pressed appearance when bold style is active, normal when bold style is off, and grayed when the selected text is only partly bolded. Bold style can also be toggled on/off with the keyboard shortcut **CTRL+B**.

This toolbar button can also be used to add or remove the special [BOLD] and [BOLD0] template codes from the selected text when editing a source template on the [Sources View Formatting Page](#) or [Citations View Formatting Page](#).

Rich Text: Italic



Click this toolbar button to set *italic style* for the selected text or for newly typed text in a notes box. If the selected text is already in italics, pressing this toolbar button will remove the style instead. The button will have a pressed appearance when italic style is active, normal when italic style is off, and grayed when the selected text is only partly in italics. Italic style can also be toggled on/off with the keyboard shortcut **CTRL+I**.

This toolbar button can also be used to add or remove the special [ITAL] and [ITAL0] template codes from the selected text when editing a source template on the [Sources View Formatting Page](#) or [Citations View Formatting Page](#).

Rich Text: Underline



Click this toolbar button to set underline style for the selected text or for newly typed text in a notes box that you wish to underline. If the selected text is already underlined, pressing this toolbar button will remove the style instead. The button face will have a pressed appearance when underline style is active, normal when underline style is off, and grayed when the selected text is only partly underlined. Underline style can also be toggled on/off with the keyboard shortcut **CTRL+U**.

This toolbar button can also be used to add or remove the special [UNDL] and [UNDL0] template codes from the selected text when editing a source template on the [Sources View Formatting Page](#) or [Citations View Formatting Page](#).

Rich Text: Toggle Codes



Click this toolbar button or press the **F2** function key to toggle between display of field codes and field values. The button face will have a pressed appearance when field values are being shown, and a normal appearance when field codes are being shown.

When displaying field values, the note text will be read-only.

Rich Text: Insert Field Code



Click this toolbar button or press the keyboard shortcut **CTRL+D** to open a dialog where a new field code can be inserted.

If you are editing a source template, source, or citation record, the [Insert Source Field Code Dialog](#) will open.

If you are editing a note in another table, the [Insert Field Code Dialog](#) will open.

If your text cursor is positioned inside an existing field code with the dialog is opened, it will become the default value, and any changes will replace the existing field code when the dialog closes. This allows you to edit existing field codes.

The information provided by the dialog also provides a way to remind yourself of what a particular field code does.

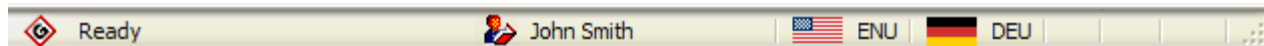
Rich Text: Source

Click this toolbar button whenever you are editing data and you want to add a source citation. This toolbar button can be used both for text fields and for notes. When adding source citations to notes, first position the text cursor at the text location where the footnote reference should appear, either by clicking with the mouse or moving with the arrow keys.

If there are existing source citations for the current text item, they will be displayed.

You can also press the **F4** key to add source citations.

Status Toolbar



The **status toolbar** appears at the bottom of the Genbox main window. It contains seven panes of current status information about the program.

The **Message pane** displays the current status of the program as a text string, shown here as "Ready". Helpful information on toolbar buttons and menu options will also be displayed here when they are selected.

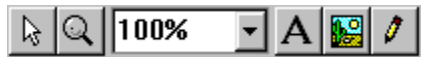
The **Current Researcher pane** displays the name of the current researcher, if any. Here it is shown as "John Smith". You can jump to the record for the current researcher on the **Researchers View** by clicking on this pane.

The **Program Language pane** displays a flag icon and language code for the language currently selected for the program. Here it is shown as "ENU" for English (United States). Click on this pane to open a menu where you can select from all the languages currently installed for the program.

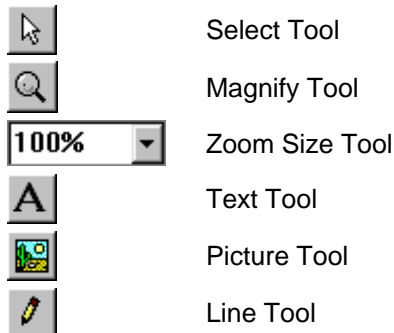
The **Output Language pane** displays a flag icon and language code for the language currently selected for use on charts and reports. Here it is shown as "DEU" for German (Germany). Click on this pane to open a menu where you can select from all the languages that currently have event types defined.

Status of the **Caps Lock** (CAP), **Num Lock** (NUM), and **Scroll Lock** (SCRL) keys appear on the final three panes.

Chart/Report Toolbar




The Chart/Report Toolbar appears when a chart or report is the current view.




The chart toolbar works **independently** with each open chart/report window. This means that you can open several views of the same chart, and each can have its own zoom size setting. You might want to keep a small full-chart "overview" window open, for example, while you do your main editing in a larger, actual-size window. (A second view of the current document is opened by clicking "New Window" on the Windows menu.)

Select Tool

- To **select chart boxes**, first click on the Select tool .
- Click on the box you want to select. A selected box will be shown with **handles** at the corners and sides.
- You can also **drag a selection rectangle** around a group of boxes that you want to select.

Magnify Tool

When you want to see more of your chart at once, you need to **zoom out**. If you are interested in seeing more detail in a small area, you need to **zoom in**. To zoom, click the Magnify tool .

- When the Magnify tool is selected, click the **left** mouse button anywhere on the chart to **zoom in**.
- Click the **right** mouse button to **zoom out**.

The zoom size will increase or decrease by about 20% for each click. The location clicked will be positioned as close as possible to the center of the view.

Zoom Size Tool


You can use the **Zoom size tool**  to quickly set the zoom size at preset sizes:

- Full size
- Full page
- Full doc
- 2400%, 1200%, 800%, 400%, 200%, 160%, 110%, 100%, 90%, 75%, 50%, 25%, 12%, 8%, or 4%


Full size is the same as 100%. **Full page** will pick a zoom size just large enough to show a complete page. **Full doc** will pick a zoom size that will allow the entire chart to fit on the screen.

Text Tool

Annotations are short lengths of text that can be typed on top of the chart or report. They can be used to draw attention to certain data items, or provide explanatory text.

- **To add an annotation**, click the Text Tool .
- Click the location on the chart or report where you want the annotation to start.
- Type the text.
- To end the annotation, click elsewhere to start a new annotation, or click a different tool button.


Once on a chart or report, an annotation can be selected, sized, and moved. You can also change its font properties:

1. **To change the font properties of an annotation**, first select it.
2. Double-click the Text Tool .
3. The [Select Font Dialog](#) will appear, allowing you to select font properties for the annotation and for new annotations.


The default font styles for annotations are bold, italic, and red.

Picture Tool

Additional pictures can be added to a chart or report after it has been generated.


1. **To add a picture**, click the Picture Tool .
2. Drag a selection rectangle to specify the size and location for the picture.
3. The [Media Pick Dialog](#) will open. Select the picture you want to include on the chart or report.

If no picture is selected from the Media Pick Dialog, only a frame will be added to the chart or report. Frame properties for empty frames and pictures can be changed:

- **To change the frame properties of a picture**, first select it.
- Double-click the Picture Tool .
- The [Picture Tool Options Dialog](#) will appear. Select the frame properties for the picture and for new pictures.


Line Tool

Freehand lines can be added to a chart or report after it has been generated. You can draw arrows, circle boxes, and draw connecting lines between annotations and boxes.

1. **To add lines**, click the Line Tool .
2. Click the locations where you want the end points of the line segments to be.
3. To draw curves, hold the mouse button down while moving.
4. Click the same location twice to end the line figure.

The endpoints of each line segment in the figure will be shown with handles. You can reposition individual endpoints by dragging on the handles.

The thickness and color of a freehand line can be changed:

- **To change the properties of a freehand line**, first select it.
- Double-click on the Line Tool .
- The [Line Tool Options Dialog](#) will open. Select the new values for line width and color.

Data Structure

Genbox is built on a relational data model, using the Microsoft JET database engine. Text data is stored in UNICODE format.

Key fields

In most data tables, the record structure begins with a numeric key field named "ID". These ID fields allow records in different tables to link to each other. In the **Families** table, for example, the first field is named "ID" and is the numeric identifier for the family represented by the current record. Among the other fields, there is one name "Father" and one named "Mother", which are used to link to two different records in the **Individuals** table. This linking is accomplished simply by storing a copy of the ID that identifies those records in the **Individuals** table. These two fields are also known as foreign keys, because they refer to key fields in an external table.

Linked Tables

There are more than 40 different tables in a Genbox database. Each table stores a different type of data, with its own record structure. For each individual, there is one main data record in the **Individuals** table. The ID value in the Individuals record serves to identify that particular individual throughout the system. Most data for an individual is stored in other tables. Birth, marriage, death, and other events are stored in the **Events** table; birth names, married names, nicknames, aliases, and numeric identifiers such as SSN and AFN numbers are stored in the **Individual Names** table; links to parents are stored in the **Child to Family Links** table; spouse links are stored in the **Spouse to Family Links** table and so on. Each type of data is stored in a separate table to make it possible to have "one-to-many" links: for any particular individual, there can be many linked records in the **Events** table. If event data had instead been stored in the main Individual record, then the number of events would have been restricted to the number of fields defined in the record structure.

Events Table

The **Events** table has perhaps the most complicated structure in the system. Unlike Individual Names records, Event records are not "owned" by a single individual. Each Event record can have up to three individuals directly associated with it, named PRIMARY, SPOUSE, and OTHER. Any number of additional individuals can be associated as witnesses. Some event types use only PRIMARY, such as "Died" and "Buried". The marriage-related events use PRIMARY and SPOUSE. Events relating two individuals who are not considered a family use PRIMARY and OTHER. The birth event uses PRIMARY and SPOUSE for the parents, and OTHER refers to the child.

Events data for an individual appears on the "Events" tab. But because event records can be shared by up to three individuals, an Events record entered for one individual may automatically appear as a record on the Events tab of up to two other individuals. For example: suppose a marriage event for Reginald Smythe is entered, with a date of 15 July 1803 at Burnt Pelham, Hertfordshire, England, and the spouse is entered as Elizabeth Conyer. Later, when you are looking at the data for Elizabeth Conyer, you will see that she has a marriage event record, with the same date and place, showing a spouse by the name of Reginald Smythe. This is another view of the same event record, except that the viewpoint has changed. Elizabeth is now considered PRIMARY, and Reginald is the SPOUSE.

Data Tables

TABLE NAME	CONTENTS
Child to Family Links	Links from individuals to parent families
Citations	Citation data
Contact Links	Links from data of various types to contacts. The "Ref Type" field identifies reference type: I = Individual, P = place, etc.
Contacts	Address, phone, and other contact information
Correspondence	Correspondence data. The "Correspondent Type" field identifies the type of correspondent with one of the constants DI_RESEARCHER, DI_IND, DI_PLACE.
Event Roles	Defined roles for events, available for use with witnesses. "Role" contains the role name. "Sequence" is the Display sequence in the witness list. "Template" is the default witnessed template. "Unique" is Yes/No: Is this role unique in the event.
Event Tags	Main event type data. The "Tag" field contains the GEDCOM tag. The "Secondary" field indicates the secondary type: 1 = Parents; 2 = Spouse; 3 = Other Individual; 4 = Name Variation; 5 = Identifier; 6 = Attribute; 7 = Text Item. "SecType" is the type of Identifier or Attribute. "Flags" contains Unique, Group A, Group B.
Event Templates	Supplementary event type data.
Events	Individual events
Excerpts	Begin and end markers for citation excerpts from source evidence text
Families	Family data
Flag Names	Names of individual flags
Genbox	Special table for holding identification information. "Creation Date": Date this database was created. "Researcher ID": The current Researcher ID. "Source Version": Source system ID and version that created this file. "Source Name": Name of source program. "Source Corp": Company and address of source program. "Data Version": Version of this data structure. "Copyright": Copyright statement for content. "Description": Description of content.
Individual Flags	Links from individuals to individual flags
Individual Names	Individual names
Individuals	Main table of individual data
List Links	members of lists
Lists	Defined lists
Media Flag Names	Names of media flags
Media Flags	Links from media to media flags
Multimedia	media
Multimedia Link	links from media to other data types
Notes	Notes. "Note Type": G = General; R = Research
Place Flag Names	Names of place flags
Place Flags	Links from places to place flags
Place Names	Names of places. "Level": 1: Country; 2: State/Province; 3: County/Parish; 4: Township; 5: City/Town; 6: Local Site. "Parent ID": Link to parent part name ID. "Sequence": First is standard. "Full ID": If this name is an abbreviation, this points to the equivalent full name; otherwise, it points to the short name.
Places	Main table of places data. "ADM": 4-Letter Administration code, levels 1 and 2. "Flags": Bit 1 = historical. "Latitude": Formatted as: DD MM SS C (degrees, minutes, seconds, N/S). Stored as + for N, - for S. "Longitude": Formatted as: DDD MM SS C (degrees, minutes, seconds, E/W). Stored as + for E, - for W.
PlacesQuery	Special table used by query subsystem

Project Objectives	Projects, objectives, and tasks
Project to Research Links	Links from projects/objectives to research targets
Research	Research targets
Researchers	Researchers
Searches	Searches defined for research targets
Source Contents	Information on contents of a source
Source Templates	Source type data
Sources	Main table on source data. "Agency": Responsible Agency. "Sort Date": Publication date for source; creation date for document. "Locater": Location with source or repository; call number.
Spouse to Family Links	Links from individuals to families
Value	Special table used by query subsystem
Witnesses	Witnesses of events

File List

SYSTEM FOLDER:	File Version	Size (KB)	File Date	Description
asycfilt.dll	2.40.4275.1	145 KB	Feb 11, 2000	Microsoft OLE 2.40 for Windows NT/95
atl.dll (Win 95/98/Me)	3.0.8449.0	73 KB	Feb 11, 2000	ATL Module for Windows (ANSI)
atl.dll (Win 2000/NT/XP)	3.0.8449.0	58 KB	Feb 11, 2000	ATL Module for Windows NT (Unicode)
comcat.dll	4.71.1460.1	22 KB	Feb 11, 2000	Component Category Manager Library
mfc42.dll	6.0.8665.0	973 KB	Feb 11, 2000	MFC DLL Shared Library
mfc42u.dll	6.0.8665.0	973 KB	Feb 11, 2000	MFC DLL Shared Library
msvcirt.dll	6.0.8168.0	77 KB	June 16, 1998	Microsoft C++ Runtime Library
msvcp60.dll	6.0.8972.0	393 KB	Aug 29, 2000	Microsoft C++ Runtime Library
msvcrt.dll	6.0.8797.0	273 KB	March 7, 2000	Microsoft C Runtime Library
oleaut32.dll	2.40.4275.1	585 KB	Feb 11, 2000	Microsoft OLE 2.40 for Windows NT/95
olepro32.dll	5.0.4275.1	161 KB	Feb 11, 2000	Microsoft OLE
stdole2.tlb	2.40.4275.1	18 KB	Feb 11, 2000	Microsoft OLE 2.40 for Windows NT/95
shfolder.dll	6.0.2600.0	22 KB	Aug 18, 2001	Shell Folder Service
msjtes40.dll	4.0.2521.8	233 KB	March 5, 1999	Microsoft Jet Expression Service
vbajet32.dll	6.0.1.8268	31 KB	Jan 21, 1999	Visual Basic for Applications Development Environment
expsrv.dll	6.0.0.8268	371 KB	Jan 21, 1999	Visual Basic for Applications Runtime - Express
mswstr10.dll	4.0.2521.8	601 KB	March 5, 1999	Microsoft Jet Sort Library
msjet40.dll	4.0.2521.8	1,465 KB	March 6, 1999	Microsoft Jet Engine Library
msjint40.dll	4.0.2521.8	149 KB	March 5, 1999	Microsoft Jet International Components
msjter40.dll	4.0.2521.8	53 KB	March 5, 1999	Microsoft Jet Errors
DAO FOLDER:				
dao360.dll	3.60.3714.5	545 KB	Jan 28, 2000	Microsoft DAO 3.6 Object Library

File Types

Genbox makes use of a number of different file types, each identified by their three-letter file extension.

Common Misspellings Type (.GCM)

The [Spell Checker Tool](#) makes use of a **Common Misspellings File**. This plain text file has two entries per line: the misspelling followed by the correct spelling.

Chart Type (.GCT)

On the [Chart View](#), a Genbox chart can be saved as a **Chart File**. A saved chart file can be opened in Genbox, where you can view, edit, and print it.

A Genbox chart file is saved in a proprietary format. It begins with the ASCII string "GBOXGCHT". The next four characters identify the major and minor version of the chart format.

Chart Options File Type (.GCO)

On the [Chart Options View](#), the options used to generate a Genbox chart can be saved to a **Chart Options File**. A saved chart options file can be opened in Genbox, where you can view the options, change them, and then generate a chart.

The chart options file is saved in a proprietary format. It begins with the ASCII string "GBOXCOPT". The next four characters identify the major and minor version of the chart options format.

Export Options File Type (.GXO)

On the [Export Options View](#), the options selected to export data can be saved to an **Export Options File**. A saved export options file can be opened in Genbox, where you can view the options, possibly change them, and then export data.

The export options file is saved in a proprietary format. It begins with the ASCII string "GBOXXOPT". The next four characters identify the major and minor version of the export options format.

GEDCOM File Type (.GED)

GEDCOM is a standard genealogy file format designed for the transfer of data between genealogy programs. Genbox can import data from GEDCOM files and export data into a GEDCOM file.

GEDCOM was designed to handle basic genealogy data types. The standard defines how extensions can be added for novel data types. Genbox uses these extensions to export its novel data types. All data stored in a Genbox database can be exported to a GEDCOM file, and imported by Genbox. You can assume that other genealogy programs probably won't support importing of the data in a GEDCOM file specific to Genbox. The import of basic genealogy data by other genealogy programs should work, with the extra data ignored.

Genbox Database Type (.GDB)

A Genbox database is stored in a Genbox Database File (.GDB). This is the same as the Microsoft database format (.MDB). It can be opened as a database in Microsoft Access 2000.

Note: modifying a Genbox database file outside of the program could corrupt the database, leading to a partial or full loss of data.

Compressed Genbox Database File (.GDZ)

When **New Database** is selected from the **File** menu, Genbox initializes the new database by copying the data stored in the special file **GBXDBINI.GDZ**. This file contains a standard Genbox database, compressed in standard ZIP format. The initialization database typically includes data on higher-level places, source types, event types, and flag definitions.

If this file is not found in the same directory as GENBOX.EXE, new databases will be created without any initial data. You can initialize a blank database by importing data from one of your other databases.

Creating your Own Initialization Database

You can create your own GBXDBINI.GDZ file for initialization of new databases:

1. If you want to start from scratch, rename or delete the current GBXDBINI.GDZ file first.
2. On the **File** menu, select **New Database**. Choose a name for your initialization database.
3. Import or enter the data you want to include in the initialization of new databases.
4. Close the database.
5. Using PkZIP or WinZIP, compress your initialization database. Name the compressed file GBXDBINI.GDZ.
6. Move the file to the same directory as GENBOX.EXE.

Note: Be careful not to import data on individuals and other data types that should not be part of a new database.

Saved Query File Type (.GQY)

On the [Query View](#), a defined Genbox query can be saved for later use as a **Saved Query File**.

A Genbox query file is saved in a proprietary format. It begins with the ASCII string "GBOXQDEF". The next four characters identify the major and minor version of the query format.

Report Options File Type (.GRO)

On the [Report Options View](#), the options used to generate a Genbox report can be saved to a **Report Options File**. A saved report options file can be opened in Genbox, where you can view the options, change them, and then generate a report.

The report options file is saved in a proprietary format. It begins with the ASCII string "GBOXROPT". The next four characters identify the major and minor version of the report options format.

Report Options File Type (.GRO)

On the [Report Options View](#), the options used to generate a Genbox report can be saved to a **Report Options File**. A saved report options file can be opened in Genbox, where you can view the options, change them, and then generate a report.

The report options file is saved in a proprietary format. It begins with the ASCII string "GBOXROPT". The next four characters identify the major and minor version of the report options format.

Rich Text File Format (.RTF)

On the [Report View](#), a Genbox report can be saved in **Rich Text Format**. A report saved in rich text format can be opened in Genbox, where you can view, edit, and print it. You can also open a rich text format file in Microsoft Word, Corel WordPerfect, and other word processors.

Rich text format is a standard document format. Rich text documents can include fonts and layout specifications.

ZIP File Format (.ZIP)

When you create backup files with the **Backup** option on the [File Menu](#), the files are saved in **ZIP File Format (.ZIP)**.

ZIP is a standard file format for compressed files.

Dynamic Link Libraries (.DLL)

Genbox makes use of dynamic link libraries, which have the extension .DLL. These are essential program components. The file GENBOXENU.DLL, for example, contains the English version of all system resources. The files GBXINIT.DLL and GBXINIT4.DLL are used for system startup initialization. Other DLL files provide language translations for other languages.

Folders

Default Folders

Genbox tracks the names of system **folders** (also called directories) that are selected in the course of completing various operations, so that they can become the default folder for similar operations in the future.

Genbox Main Folder

The folder on your system that contains GENBOX.EXE is the **Genbox Main Folder**. The content of this folder includes:

Genbox.exe	The main program.
GenboxENU.dll	Resource file for English (United States) language. Resource files for other languages may also appear, such as GenboxENG.dll for English (United Kingdom) and GenboxDEU.dll for German (Germany). In general: when a file name ends in three capitalized letters from the set of language codes, it indicates the file is specific to that language. The spelling files, for example, also follow this naming convention.
GBXDBINI.GDZ	Compressed Genbox initialization database.
Genbox.chm	Online help file.
commonENU.gcm	Commonly misspelled words, for English (United States).
mainENU.gdt	Main spelling dictionary for English (United States).
userENU.gdt	User-defined spelling dictionary for English (United States). This file is optional.
pad_file.xml	File version information. (optional)

Subfolders Used by Genbox

There are three subfolders beneath the Genbox Main Folder that are used by the menu system. These folders are named:

- Chart Options Menu
- Report Options Menu
- Sample

The "Chart Options Menu" subfolder contains the Genbox chart options files (extension .GCO) that will appear as the choices on the submenus of the Chart Options Menu. The name of each chart options file determines both where it will appear on the submenus and what the text of the menu option will be.

The "Report Options Menu" subfolder contains the Genbox report options files (extension .GRO) that will appear as the choices on the submenus of the Report Options Menu.

See the section [Charts and Reports Submenus](#) for more information.

The "Sample" subdirectory contains the sample.ged GEDCOM file, which is used to initialize the sample.gdb sample database that is also stored in this folder. Any pictures used by the sample database are also stored there.

Keyboard Shortcuts

A number of menu commands can also be activated using the keyboard. The special key sequences are given in the table below.

ALT+DOWN ARROW	Select: Select Records...
ALT+END	Select: Last Record
ALT+ENTER	Edit: Properties
ALT+HOME	Select: First Record
ALT+LEFT ARROW	Select: Jump Back
ALT+PAGE DOWN	Select: Next Record
ALT+PAGE UP	Select: Previous Record
ALT+RIGHT ARROW	Select: Jump Forward
ALT+UP ARROW	Tools: Search...
CONTEXT MENU KEY (on some keyboards)	Accesses right-click context menu.
CTRL+ESC	Edit: Restore
CTRL+F6	Capture Window
CTRL+PAGE DOWN	Next Tab
CTRL+PAGE UP	Previous Tab
CTRL+A	Edit: Select All
CTRL+B	Rich Text: Bold
CTRL+C	Edit: Copy
CTRL+D	Insert Field Code
CTRL+F	Find
CTRL+G	Go To
CTRL+I	Rich Text: Italic
CTRL+L	Add Subrecord
CTRL+M	Mark Record
CTRL+N	New Main Record
CTRL+O	File: Open
CTRL+P	File: Print
CTRL+R	Edit: Rename
CTRL+S	File: Save
CTRL+U	Rich Text: Underline
CTRL+V	Edit: Paste
CTRL+W	Close Window
CTRL+X	Edit: Cut
CTRL+Z	Edit: Undo
ESC	Edit: Cancel
F1	Context-Sensitive Help
F2	Toggle Codes
F3	Find Next
SHIFT+F3	Find Previous
F4	Jump to Citation
F5	Magnify
F7	Spell Checker
F8	Next Window
SHIFT+F8	Previous Window

A key sequence like "CTRL+B" is entered by pressing and holding the CONTROL key, then pressing the "B" key.

Language Codes

Following is a list of the language codes used by Genbox.

AFK	Afrikaans
SQI	Albanian
AR	Arabic
ARA	Arabic (Saudi Arabia)
ARB	Arabic (Lebanon)
ARI	Arabic (Iraq)
ARE	Arabic (Egypt)
ARG	Arabic (Algeria)
ARJ	Arabic (Jordan)
ARK	Arabic (U.A.E.)
ARL	Arabic (Libya)
ARM	Arabic (Monaco)
ARO	Arabic (Oman)
ARQ	Arabic (Qatar)
ARS	Arabic (Syria)
ART	Arabic (Tunisia)
ARU	Arabic (Bahrain)
ARY	Arabic (Yemen)
HYE	Armenian
AZE	Azeri
EUQ	Basque
BEL	Belarusian
BGR	Bulgarian
CAT	Catalan
CHS	Chinese (PRC)
CHT	Chinese (Taiwan)
ZHH	Chinese (Hong Kong)
ZHI	Chinese (Singapore)
ZHM	Chinese (Macau SAR)
CSY	Czech
DAN	Danish
NL	Dutch
NLB	Dutch (Belgium)
NLD	Dutch (Netherlands)
EN	English
ENA	English (Australia)
ENB	English (Belize)
ENC	English (Canada)
ENG	English (United Kingdom)
ENI	English (Ireland)
ENJ	English (Jamaica)
ENP	English (Philippines)
ENS	English (South Africa)
ENT	English (Trinidad)
ENU	English (United States)
ENW	English (Zimbabwe)

ENZ	English (New Zealand)
ETI	Estonian
FOS	Faeroese
FAR	Farsi
FIL	Filipino
FIN	Finnish
FR	French
FRA	French (France)
FRB	French (Belgium)
FRC	French (Canada)
FRL	French (Luxembourg)
FRM	French (Monaco)
FRS	French (Switzerland)
GLC	Galician
KAT	Georgian
DE	German
DEA	German (Austria)
DEU	German (Germany)
ELL	Greek
GUJ	Gujarati
HEB	Hebrew
HIN	Hindi
HUN	Hungarian
ISL	Icelandic
IND	Indonesian
IT	Italian
ITA	Italian (Italy)
ITS	Italian (Switzerland)
JPN	Japanese
KAN	Kannada
KKZ	Kazakh
KNK	Konkani
KOR	Korean
KYR	Kyrgyz
LVI	Latvian
LTH	Lithuanian
MKI	FYRO Macedonian
MS	Malay
MSB	Malay (Brunei Darussalam)
MSL	Malay (Malaysia)
MAR	Marathi
MON	Mongolian
NO	Norwegian
NOR	Norwegian (Bokmal)
NON	Norwegian (Nynorsk)
PLK	Polish
PT	Portuguese
PTB	Portuguese (Brazil)
PTG	Portuguese (Portugal)
PAN	Punjabi
ROM	Romanian

RUS	Russian
SAN	Sanskrit
SRB	Serbian (Cyrillic)
SRL	Serbian (Latin)
SLV	Slovenian
ES	Spanish
ESA	Spanish (Panama)
ESB	Spanish (Bolivia)
ESC	Spanish (Costa Rica)
ESD	Spanish (Dom. Rep.)
ESE	Spanish (El Salvador)
ESF	Spanish (Ecuador)
ESG	Spanish (Guatamala)
ESH	Spanish (Honduras)
ESI	Spanish (Nicaragua)
ESL	Spanish (Chile)
ESM	Spanish (Mexico)
ESN	Spanish (Spain, intl. sort)
ESO	Spanish (Colombia)
ESP	Spanish (Spain, trad. sort)
ESR	Spanish (Peru)
ESS	Spanish (Argentina)
ESU	Spanish (Puerto Rico)
ESV	Spanish (Venezuela)
ESY	Spanish (Uruguay)
ESZ	Spanish (Paraguay)
SWK	Swahili
SV	Swedish
SVE	Swedish (Sweden)
SVF	Swedish (Finland)
SYR	Syriac
TAM	Tamil
TTT	Tatar
TEL	Telugu
THA	Thai
TRK	Turkish
UKR	Ukrainian
URD	Urdu
UZB	Uzbek
VIT	Vietnamese

Sentence Template Code Reference

Following is the list of sentence template field codes recognized by Genbox. These codes can be used in event templates and also in general and research notes. To use a code, enclose it in square brackets, such as "[L1234]". For a discussion of how to construct templates, see the section [Sentence Templates](#).

Base Codes	Modifiers	
BOLD		Turn bold style on. (Instead of a code, you can also highlight the text to be bolded and press the "B" toolbar button.)
BOLD	0	Turn bold style off.
UNDL		Turn underline style on. (Instead of a code, you can also highlight the text to be underlined and press the "U" toolbar button.)
UNDL	0	Turn underline style off.
ITAL		Turn italic style on. (Instead of a code, you can also highlight the text to be italicized and press the "I" toolbar button.)
ITAL	0	Turn italic style off.
P		Primary individual name. Full name shown on first reference; given name (or nickname) on second reference; pronoun (he/she) if last referenced individual was the same and sex is known.
S		Spouse individual name. Full name shown on first reference; given name (or nickname) on second reference; pronoun (he/she) if last referenced individual was the same and sex is known.
S	(with ID)	Embedded Source citation. The ID value is the source citation ID. To add/edit source citations, press the F4 key. Source citations are handled separately from other field codes.
O		Other individual name. Full name shown on first reference; given name (or nickname) on second reference; pronoun (he/she) if last referenced individual was the same and sex is known.
P	1, 2, 3	Principal 1, 2, or 3 individual name. These are same three individuals that are referenced by [P], [S], and [O], but these references are context-independent. That means the names that fill the [P1], [P2], [P3] codes will not change depending on the current focus individual, which is not always the case for the context-dependent [P], [S], and [O] codes.
W		Witness name. Full name shown on first reference; given name (or nickname) on second reference or pronoun (he/she) if last referenced individual was the same and sex is known. [W1] returns name of first listed witness; [W2] returns names of second listed witness. Witnesses can also be referenced by role name: [W: groomsman] returns name of first witness with the role "groomsman". An ending wildcard can be used with the role name, so for example "[WW:god*]" would return a list of witnesses with roles of "godfather" or "godmother". The [W] code without a numeric parameter or role name parameter references the most recently referred witness.
WW		The list of all witness names that have not been mentioned already, in a comma separated list, with "and" before the last name. A role name filter can also be appended following a colon, as in [WW:bridesmaid].
WWR		A list of all witness names that have not been mentioned already, along with roles, if any. A role name filter can also be appended following a colon, as in [WWR:god*].
WW, WWR	'	When the single-quote qualifier is appended, as in [WW'] or [WWR'], this returns the "list" of witnesses only when there is exactly one witness left.
WW, WWR	"	When the double-quote qualifier is appended, as in [WW"] or [WWR"], this returns the "list" of witness names only when there are two or more witness names left. By using the single and double quote modifiers, sentence templates that use singular or plural verbs can be constructed.
I	(with ID)	Individual name of any individual in the database: ID value must follow the

		base code, as in [I234] for the name of individual ID 234. Full name (preferred or primary, depending on report options) shown on first reference; given name (or nickname) on second reference; pronoun (he/she) if last referenced individual was the same and sex is known.
N		When not followed by a number: Secondary value of individual name variation or identifier.
N	(with ID)	Specific individual name/identifier of any individual in the database: Identifier ID value must follow the base code, as in [N3824] for individual identifier ID 3824. The name appears as stored in the identifier record. With this code, you can control which name variation appears in the output.
P, S, O, W, I, WW, WWR	+	Like base code, but forced to show full name always.
P, S, O, W, I, WW, WWR	~	Like base code, but forced to show given name/nickname always.
P, S, O, W, I	-	Like base code, but pronoun is never used.
P, S, O, W, I	=	Like base code, but pronoun is always used. Note: care must be taken that the context will always make the reference clear.
P, S, O, W, I, WW, WWR	m, f, u, o	These modifiers apply a filter according to sex: male (m), female (f), unknown gender (u), or other gender (o). If the individual indicated by the base does not match the sex modifier, then an empty value is returned. This allows templates to be tailored to the sex of the individual.
P, S, O, W, I	P	Possessive case for primary, spouse, other, and witness individuals (his or her, depending on sex data value). If the individual has not been mentioned yet in the current context, the given name will be made possessive, producing a construction such as "John's".
P, S, O, W, I	N	Nominative case for primary, spouse, other, and witness individuals. These will be filled with "he" or "she" when a pronoun is to be used. Nominative case is the default when no case qualifier is given.
P, S, O, W, I	D	Direct object for primary, spouse, other, and witness individuals. These will be filled with "him" or "her" when a pronoun is to be used.
P, S, O, W, I	I	Indirect object for primary, spouse, other, and witness individuals. These will be filled with "him" or "her" when a pronoun is to be used.
P, S, O, W, I	X	Reflexive case for primary, spouse, other, and witness individuals. These will be filled with "himself" or "herself" when a pronoun is to be used.
A	P, S, O, W, I, 1, 2, 3	Age of individual at time of event, in years, for primary, spouse, other, witness, individual, principal 1, principal 2, or principal 3. An Individual ID is required with the base code "I".
WR		Witness role. [WR1] returns role of first witness, [WR2] returns role of second witness. [WR] without a numeric parameter returns role of most recently shown witness.
C		Secondary value of contact address.
D		Date (space, qualifier, day+month+year, parenthetical part). Default qualifier will be "on" if day value or "in" if month or year only.
0D		Date qualifier only. Default qualifier will be "on" if day value or "in" if month or year only.
1D		Date without the qualifier.
DY		Date year.
DM		Date month name.
DD		Date day of month.
D+L		Date and Location. Either date or location may appear first. The actual ordering of the data and place information for a particular event will be based on report option settings, surety levels, and data modifiers.
L		Standard place name (location) for the event. Includes leading space and place modifier value. Full place levels are shown on first reference; first level (or enough levels to distinguish place in context) is shown on second

		reference; "there" is used if last referenced place was the same. The default place modifier is normally "at" if a local site or "in" otherwise.
L	(with ID)	Standard place name for any place in the database. Place ID is required. Full place levels are shown on first reference; first level (or enough levels to distinguish place in context) is shown on second reference; "there" is used if last referenced place was the same.
L	+	Like [L] but forced to show full place levels always.
L	-	Like [L] but "there" is never used; if the place is the same as the previous one mentioned, the lowest place level will be shown instead.
L	~	Like [L] but only the lowest non-blank place level is used.
0L, 1L, 2L, 3L, 4L, 5L, 6L		A part number preceding the "L" base code indicates that only a particular place level (0-6) should be returned. 0L = place modifier; 1L = local site; 2L = city/town; 3L = township; 4L = county/parish; 5L = state/province; 6L = nation/area. For example: if the place stored was "north of Miami, Florida", and the template was "[P] lived [0L] the fine city of [2L] in the sunny state of [5L]", the result would be "He lived north of the fine city of Miami in the sunny state of Florida". References to empty place levels will be blank. No leading place modifiers are used with place level names.
1L, 2L, 3L, 4L, 5L	+	Show full place levels starting with the indicated level. No leading place modifier.
1L, 2L, 3L, 4L, 5L	-	Show contextual place name starting with the indicated level. No leading place modifier; "there" is never used.
1L, 2L, 3L, 4L, 5L	~	Show lowest non-blank place level on or after the indicated starting level.
LN	(with ID)	place name variation for any place in the database. Place Name ID is required. Full place levels are shown on first reference; first level (or enough levels to distinguish place in context) is shown on second reference; "there" is used if last referenced place was the same. This code allows you to control which place name variation is used.
T		Secondary value of attribute or text.
G		<p>Event general note. When the [G] code is used to explicitly include general notes in the sentence, then the note text will be considered an integral part of the sentence, overriding note content options. Sentence terminating punctuation will appear at the end of the template, along with any sentence-level citation references; thus, the text of the note will assume the same sentence-level citations as the rest of the sentence.</p> <p>When no [G] code is specified in an event template, then report content options will control whether general notes appear after the event sentence. In this case, the general note is considered to start a separate sentence from the event template; the event template will receive sentence terminating punctuation and any source citation references will immediately follow, then the general note will appear.</p>
G	P, S, O, W, I, N, L, LN, E	General note for Primary, Spouse or Source, Other, Witness, Individual, Individual Name, Place, Place Name, or Event. If "GS" is followed with a number, this is a Source ID general note reference; otherwise it is the event Spouse/Secondary reference. I, N, L, LN, and E require an ID value when referring to data items outside the current event record. For example: "[P] changed his name to [N]. [GN]" would include the general notes from the linked name record.
R		<p>Event research note. When the [R] code is used to explicitly include research notes in the sentence, then the note text will be considered an integral part of the sentence, overriding note content options. Sentence terminating punctuation will appear at the end of the template, along with any sentence-level citation references; thus, the text of the note will assume the same sentence-level citations as the rest of the sentence.</p> <p>When no [R] code is specified in an event template, then report content options will control whether research notes appear after the event sentence</p>

		(or optionally in a footnote reference). In this case, the research note is considered to start a separate sentence from the event template; the event template will receive sentence terminating punctuation and any source citation references will immediately follow, then the research note will appear.
R	P, S, O, W, I, N, L, LN, E	Research note for Primary, Spouse or Source, Other, Witness, Individual, Individual Name, Place, Place Name, or Event. If "RS" is followed with a number, this is a Source ID research note reference; otherwise it is the event Spouse/Secondary reference. I, N, L, LN, and E require an ID value.
P1, P2, P3	%	"When focus individual" modifier. When the percent sign (%) is added to the principal codes P1, P2, and P3, a value will be produced only when the selected principal is the current focus individual. With this feature, you can construct conditional groups in the general notes that will be based on which principal in the event is the current focus individual. This means different event notes can be stored for the father, mother, and child of an event.
PID		Individual ID of primary individual.
SID		Individual ID of spouse.
CR		Start a new line (carriage return).
TAB		Insert a tab character.
E		Event name. Includes leading indefinite article ("a" or "an" in English).
0E		Event name article only ("a" or "an").
1E		Event name without the article.
ET		Event type. Includes leading indefinite article ("a" or "an" in English).
0ET		Event type article only ("a" or "an").
1ET		Event type without the article.
CHILD		Relation of other to primary: son, daughter, or child. For example: "[P] had a [CHILD] [D+L]" would read "Reginald had a son ..." if the sex of the OTHER individual is a male. If the sex is unknown, "child" will be used.
* COMMENT		When appearing in a group, as in "< this is the comment text [COMMENT]>", the text in the group will be treated as informational, and will not appear in the output. You can also use this keyword to "comment out" portions of a template you wish to temporarily disable, as in "<[*] <. Witnesses: [WWR]>>".
...		(Global template only) This keyword represents the results of the local event template. It allows the global template to position elements both before and after the local template's results. Note: if missing from the global template, all local event templates will effectively be disabled.

Source Template Code Reference

Following is a list of the source template codes recognized by Genbox. Each of these template codes must be entered with square brackets, as in [BOLD], in order to be recognized. They can be entered in upper or lower case. For a discussion of source templates, see the section [Source Templates](#).

BOLD	Turn bold style on.
BOLD0	Turn bold style off.
UNDL	Turn underline style on.
UNDL0	Turn underline style off.
ITAL	Turn italic style on.
ITAL0	Turn italic style off.
NEWL	New line.
CD	Citation detail from the citation record.
EXCERPT	Citation excerpt text.
DOC ID	Source ID of the lower source record. This can be used for diagnostic purposes.
DOC TITLE	Full Title of the lower source.
DOC SHORT TITLE	Short Title of the lower source. If used in the secondary citation and the Short Title field is empty, a short title will be auto-generated from the full title. If used in the primary citation and the Short Title is the same as the full title, the [DOC SHORT TITLE] value will be set to blank; this makes it possible to construct a template clause of "<hereinafter called [DOC SHORT TITLE]>" that will only appear when the short title is different from the full title.
DOC PLACE	Full place information of the lower source record.
DOC PLACE INV	Full place information of the lower source, inverted so that the country place level is shown first, followed by state, county, city, and local site. Parts are separated by periods. This code is useful in bibliographies, where entries are sorted by location.
DOC COUNTRY	Country place level of lower source record.
DOC STATE	State place level of lower source record.
DOC COUNTY	County place level of lower source record.
DOC CITY	City place level of lower source record.
DOC LOCAL SITE	Local site place level of lower source record.
DOC AUTHOR	Author of lower source record.
DOC AUTHOR TYPE	Author type of lower source record. If the type is "Author" or "Agency", the type will be omitted.
DOC SUBJECT	Subject field of the lower source record.
DOC DATE	Date value of the lower source record.
DOC ORIGINAL DATE	Second date field of the lower source record. This is used for the earliest date of a document. For example, the date a will was signed could be stored in this field, and the date the will was probated would go in the normal date field. If only one date value is available, it should go in the [DOC DATE] field.
DOC LOCATER	Locater field of the lower source record.
DOC QUALIFIER	Qualifier field of the lower source record.
DOC NOTES	General notes of the lower source record.
DOC TEXT	Evidence text of the lower source record.
RATIONALE	Citation rationale text.
SOURCE ID	Source ID of the higher source. This can be used for diagnostic purposes.
SOURCE TITLE	Title of the higher source record.
SOURCE SHORT TITLE	Short Title of the higher source. If used in the secondary citation and the Short Title field is empty, a short title will be auto-generated from the full title. If used in the primary citation and the Short Title is the same as the full title, the [SOURCE SHORT TITLE] value will be

	set to blank; this makes it possible to construct a template clause of "<hereinafter called [SOURCE SHORT TITLE]>" that will only appear when the short title is different from the full title.
SOURCE AUTHOR	Author of the higher source record.
SOURCE AUTHOR TYPE	Author type of the higher source record. If the type is "Author" or "Agency", the type will be omitted.
SOURCE LOCATER	Locater field of the higher source record.
SOURCE QUALIFIER	Qualifier field of the higher source record.
SOURCE NOTES	General notes of the higher source record.
SOURCE TEXT	Evidence text of the higher source record.
PUBLISHER	Name of publisher of the higher source record.
PUB DATE	Date field of the higher source record.
PUB ORIGINAL DATE	Second date field of the higher source record. This is useful for storing the original publication date of books that have been reprinted, with the more recent date in the normal date field.
PUB PLACE	Full place information of the higher source record.
PUB PLACE INV	Full publisher place information of the higher source, inverted so that the country place level is shown first, followed by state, county, city, and local site. Parts are separated by periods. This code is useful in biographies, where entries are sorted by location.
REPOSITORY	Full repository name.
REPOSITORY PLACE	Full place information for the repository.
REPOSITORY PLACE INV	Full publisher place information of the repository, inverted so that the country place level is shown first, followed by state, county, city, and local site. Parts are separated by periods. This code is useful in biographies, where entries are sorted by location.
REPOSITORY ADDRESS	Repository contact address information formatted as one line.
REPOSITORY URL	URL of the repository.
REPOSITORY EMAIL	Email address of the repository.
REPOSITORY COUNTRY	Country place level of the repository.
REPOSITORY STATE	State place level of the repository.
REPOSITORY COUNTY	County place level of the repository.
REPOSITORY CITY	City place level of the repository.
REPOSITORY LOCAL SITE	Local site level of the repository.
REPOSITORY NOTES	General notes of the repository.
ANNOTATION	Annotation text from the citation record.
LEAD TEXT	Lead text from the citation record.
NOSEP	(for use in Annotation text only) When the annotation text ends with the special keyword [NOSEP], the default "Citation Separator" text (usually a semicolon) is not added when followed by another source in the footnote. This allows two source citations to be formatted together and read as one sentence.
CR	Start a new line (carriage return).

TAB	Insert a tab character.
TEMPLATE	Name of the current source template, shortened by truncating at the first occurrence of a comma, semicolon, colon, double quote, opening parenthesis, bracket, or brace.
* or COMMENT	When appearing in a group, as in "< this is the comment text [COMMENT]>", the text in the group will be treated as informational, and will not appear in the output. You can also use this keyword to "comment out" portions of a template you wish to temporarily disable, as in "<[*] <[ANNOTATION]>>".
...	(Global template only) This keyword represents the results of the local source template. It allows the global template to position elements both before and after the local template's results. Note: if missing from the global template, all local source templates will effectively be disabled.
[or]	Insert a left or right square bracket. Normally, square brackets indicate the start of a template code; to cause a square bracket to appear in the output, it must be entered as a template code itself (surrounded by its own set of square brackets). For example: "[[the date is unreadable]]" would appear in the output as "[the date is unreadable]".
< or >	Insert a left or right angle bracket. Normally, angle brackets are used for grouping. To cause an angle bracket to appear in the output, it must be entered as a template code, as in "[<] this is not a group [>]", which would appear as "<this is not a group>".
	Insert a vertical bar. Normally, the vertical bar is used to separate alternatives in a group.

Glossary

Ahnentafel

An individual numbering system for ancestors where the father's number is twice the child's number, and the mother's number is twice the child's number plus 1.

AIFF

Audio Interchange File Format: an audio file format.

alert

A warning or notice of an error in the form of a message that pops up on the screen.

ASCII

American Standard Code for Information Interchange: a text file format. ASCII does not support formatted text.

AU

Audio Data File: an audio file format.

auto-completion

A data entry feature that will display the characters that complete a partially-entered name. The program guesses at what you are typing and provides the remainder. If the guess is correct, press ENTER or TAB or the right arrow to accept it; otherwise simply ignore the added portion and continue typing the correct text.

AVI

Audio/Video Interleaved File: a video file format.

bibliography

On a report, an alphabetical list of sources that have been referenced in the citations.

BMDB

Birth, Marriage, Death, Burial. These four events are commonly selected on charts and reports.

BMP

Windows Bitmap: an image file format.

case sensitive

Distinguishes between upper and lower case characters. If, for example, a search is case sensitive, then a search on "Apple" would not match "APPLE" or "apple". If a search was case insensitive, it would have found these matches.

character field

A table data field that can include any characters, such as letters, numbers and punctuation.

chart

A document generated by the program that is primarily graphical in nature and can be edited in a graphics program.

check box

A hollow square that represents the status of an option that can be selected or deselected by clicking; when selected, an "X" or a check mark appears in the box.

citation

The documentation accompanying a piece of information that states the source of the information. The citation can be used to evaluate the validity of the information and also to relocate the source.

click

A mouse operation accomplished by first positioning the pointer on the item of interest, then quickly pressing and releasing the left mouse button, without moving the mouse.

clipboard

An internal temporary storage location used to hold text being transferred between data entry boxes or programs. Text is placed on the clipboard with the Cut or Copy menu operations and retrieved with the Paste menu operation.

collateral relative

A relative who is not a direct ancestor or dependant.

compact

For a database, to permanently remove the records that have been marked for deletion. Compacting a database will cause the wasted space to be removed, making the file take up less space on the storage medium.

computed field

A value that is the result of an expression or calculation which is based on other fields in the database. Computed fields are not stored in the database. The value shown cannot be edited directly.

context

On a report, the individuals, dates, places, and events that have been mentioned in the current unit of discourse (sentence or paragraph). By keeping track of the context, the program can use shortened forms (short names, pronouns, and conjunctions) to remove redundancy and produce a more natural text flow.

cursor

In a text box, the blinking vertical bar used to indicate the current insertion point or selection position.

data table

Information stored on the computer and organized into records so that it can be readily manipulated and sorted.

data type

An identifier for the type of data that can be stored in a field, such as character, numeric, date, pick field, or check box.

default

The setting used when no selection has been made by the user.

default_button

The push button with a bold border in dialogs. It can be selected simply by pressing the Enter key.

dialog

A window that appears on the screen when more information is needed in order to complete the command requested.

direct ancestor

A parent, grandparent, great-grandparent, etc. in the direct-line ancestry of the starting individual.

disable

To make an item unavailable for use. Disabled items are shown "dimmed" and cannot be chosen.

double-click

A mouse operation accomplished by first positioning the pointer on the item of interest, then clicking the left mouse button twice in rapid succession without moving the mouse.

drag

A mouse operation accomplished by first positioning the pointer at the desired location, then pressing and holding down the left mouse button while moving the mouse at the same time. The drag operation is complete when the button is released.

EMF

Enhanced Metafile: an image file format.

ESC key

A keyboard key that generates the escape character. The Escape key is labeled "Esc" on the keyboard and usually appears in the top left corner.

event-driven

A state in which the sequence of actions is determined by the user. When a program is event-driven, the computer responds to you instead of making you respond to it.

export

To convert data to a special format and write it to an external file that can later be imported into another program.

expression

A number, variable, word or group of words that can be evaluated using operators and functions to form a new value.

family

In Genbox, a family is defined as two parents (one possibly unknown) and their joint offspring, if any. Each pairing of an individual and spouse constitutes a different family.

fan chart

A genealogy chart arranged in arcs similar in appearance to a paper fan.

field

In a database table, a particular data element in a record. A data record is made up of several fields, and a database table is made up of a number of records.

On a window, Text boxes that accept input are also sometimes called fields.

flag

A data element or program option that can accept a yes/no or on/off setting.

GCO

Genbox Chart Options Format: a custom file format for the storage of Genbox chart options.

GCT

Genbox Chart Format: a custom file format for the storage of Genbox charts.

GDB

Genbox Database Format: same as MDB, but renamed to help identify the file as a Genbox database.

GEDCOM

Genealogical Data Communication: a file format for the exchange of computerized genealogical data. It was developed by the Family History Department of the Church of Jesus Christ of Latter-day Saints.

Genbox

Pronounced "GEN-box": the name given to the program, reflecting its roots as a genealogical box chart generation utility.

GQY

Genbox Query Definition Format: a custom file format for the storage of Genbox query definitions.

GRO

Genbox Report Options Format: a custom file format for the storage of Genbox report options.

GRT

Genbox Report Format: a custom file format for the storage of Genbox reports.

hierarchy

An organization of elements into groups and subgroups, where each element is subordinate to the one above it. In Genbox, places are organized into a 6-level hierarchy. Project objectives are also organized into a hierarchy.

highlight

Text displayed in a special style to distinguish it from surrounding text.

HTML

Hypertext Markup Language: the file format used for documents published on the world-wide web.

import

To load and convert data from a file written in a supported format and either append it to the current database or store it to a new database.

index

An ordering of records within a table, based on key fields.

individual

A data record representing a specific person. Each person stored in a database will have their own individual record. When there is doubt whether two source records refer to the same person, separate individual records can be created for each. When the match is confirmed, the individual records can be merged.

insert mode

The default text-editing mode in which any character you type is inserted at the cursor position and the text to the right of the cursor is shifted to the right. Compare with replace mode.

join condition

A state that specifies a relationship between two open tables, usually based on a field common to both tables. Related tables can have several join conditions.

JPG

Joint Photographic Experts Group: an image file format.

key

On a chart or report, the name of an individual or other data item that the chart or report should be based on. Multiple keys can be entered. If a list is selected, each member of the list becomes a key. If a query is selected, each matching record of the query becomes a key.

key field

A field in a record that is used, possibly along with other fields, to uniquely identify a record.

list box

A window control that contains multiple lines of text, each line containing data from a different data table record. Column headings appear across the top.

menu bar

A horizontal strip that appears at the top of the screen and contains menu pads.

menu options

Commands, found on menus, that perform specific actions. When you choose a menu option, you are telling the program what action to take.

menu pads

The menu names found on the menu bar.

menu name

A word, phrase or icon on the menu bar that designates one menu. Selecting the menu pad highlights the name and causes the menu options to appear.

menu system

The combination of the menu bar, menu pads, menus and menu options.

MIDI

Musical Instrument Digital Interface: an audio file format.

minimize

For a window, the act of causing the window to become an icon that includes the title of the window.

modal

Describes the state of a window or dialog when it does not allow another window or dialog to be brought in front of it until that window or dialog is deactivated.

MP3

MPEG Audio Layer 3: an audio file format.

MPGA

MPEG Audio Layer 3: an audio file format.

MOV

QuickTime Movie File: a video file format.

MPG

MPEG (Moving Picture Experts Group): a video file format.

narrative

A report format where the data is composed into sentences and paragraphs, much like a story.

NEHGS

New England Historical and Genealogical Society.

NGS

National Genealogical Society.

numeric field

A data table field that can store numbers. A decimal point and a leading plus or minus sign can also be stored in the field.

online help

A guide to the system, accessible while using the program, that provides complete information to all of the system functions.

page down region

The region on the scroll bar between the down arrow and the thumb. Clicking in this area causes a window to scroll forwards through a full page of text at a time.

page up region

The region on the scroll bar between the up arrow and the thumb. Clicking in this area causes a window to scroll backwards through a full page of text at a time.

paste

To place the contents of the clipboard at the insertion point.

PCX

PC Paintbrush File: an image file format.

PDF

Portable Document Format: a read-only file format for formatted text and graphics, designed for maximum portability. A number of third-party companies provide specially-designed printer drivers that, instead of printing a document, produce a file in PDF format. With one of these products installed, you can produce Genbox charts and reports in PDF format.

pedigree

A standard direct ancestor report format where the parents of each individual are shown to the right, with the father above the mother.

PICT

Macintosh PICT File: an image file format.

PNG

Portable Network Graphics: an image file format.

pointer

A small arrow on the screen that follows the movement of the mouse and is used to indicate where your next action will take place.

principal

For events, one of up to three individuals having primary importance in the event. For a birth event, the principals are the father, mother, and child. For a marriage event, the principals are the husband and wife. For a death event, the single principal is the individual that died.

push buttons

A usually rectangular window control displaying text or an icon with an associated action. The action associated with a push button occurs immediately when you click the push button.

QT

QuickTime Movie File: a video file format.

query

For a database, an operation that searches for records according to a specified criteria. In Genbox, a query can be performed to search for individual records. The results of the query are returned in the form of a list.

radio buttons

A set of hollow circles followed by text or pictures used to select one option from a group of options. Radio buttons are grouped so that only one can be chosen at a time, like the buttons on a car radio. Click a radio button to select it. When a radio button is selected, it appears filled in and any previously chosen radio button becomes deselected.

record

A unit of storage in a data table. Each table can contain a large number of records. Each record is comprised of fields.

related table

A table with records that store a copy of the key fields of records in another table.

relational expression

An expression that describes a link between two tables based on a common field or set of fields.

report

A document generated by the program that is primarily textual in nature and can be edited in a word processing program.

repository

A place where a source can be found. It could be a library, archive, private home, etc.

RQBE

Relational Query By Example: an interface design of specifying query conditions by simply filling in blanks to show what matching records should look like.

RTF

Rich Text Format: a file format for text documents that includes special codes for font characteristics, text styles, pictures, headings, etc. RTF is supported by most word processors and provides a way to exchange formatted text documents between them.

scroll

To move through the contents of a window or control or so that a different part becomes visible.

scroll bar

A vertical or horizontal bar along the edge of a window or control used to view the contents that extends beyond the visible area.

select

To designate where the next action will take place. To select using a mouse, you click on or drag across information. You can also select menu items by typing a letter or number at the prompt, by using a combination key press, or by using arrow keys.

selection

The information or items that will be affected by the next command. A selection usually appears highlighted.

Soundex

A system of codifying words according to their sound, rather than their spelling.

spouse

The husband or wife of the current individual.

SQL

Structured Query Language: an industry standard for querying relational databases for information. In Genbox, the Query tool generates the SQL statement automatically. The generated SQL statement can be viewed on the Properties Page.

tabbed dialog window

A window containing multiple pages of information, where the names of the pages are displayed in a row of boxes called "tabs". Clicking a tab brings its page to the front of the other pages.

SND

Audio Data File: an audio file format.

string

An item of information consisting of a sequence of text characters.

tag

For an event, the usually 4-character label that identifies the event type. For a birth event, the tag is "BIRT". For a marriage event, the tag is "MARR". Event tags are part of the GEDCOM standard.

TGA

Targa Image File: an image file format.

template

A sentence containing codes that will be filled in with data when the report is produced. The template allows you to specify how the data should be organized and formatted. Genbox supports templates for events and for source citations. It also supports simple templates for chart and report headings, and for default source names.

thumb

A gray box in the scroll bar that indicates the relative position in the content. If you want to move through the content rapidly you can drag the thumb up and down.

TIFF

Tagged Image File Format: an image file format.

TXT

Text Format: a text file format.

title bar

A horizontal band across the top of a window that displays the window's title.

WAV

Wave File Format: an audio file format.

wildcard

A character that may be used to represent a sequence of characters when searching for text. Genbox supports two wildcards: the asterisk "*" to represent zero or more unknown characters and the question mark "?" to represent a single unknown character.

window

An independent, boxed area on the screen that displays information. A window can be opened and closed, moved around on the desktop, and changed in size. Windows commonly overlap other windows.

witness

An individual who was associated with an event but was not one of the principals involved.

WMF

Windows Metafile: an image file format.

word wrap

The automatic continuation of text from the end of one line to the beginning of the next, so that you don't have to press the Enter key at the end of each line as you type. Entire words are usually wrapped.

WMV

Windows Media File: a video file format.

WVX

Windows Media File: a video file format.

zoom

The process of enlarging the current view or window.