

PAF 5.2 Class Instructions

Instructor: Cathie Owens

Home Phone: 942-5910

Class schedule: Each class will consist of a lecture using a LCD projector to illustrate how to use PAF. During the following weeks the student will be expected to complete a class exercise that will reinforce the concepts learned in class.

Prerequisites: You should have some PC experience and be familiar with using a mouse. Class members should bring this handout with them to each class.

Handouts: We will not use a Users Guide or manual in this class. In addition to this class handout, there are notes on each lecture and additional information contained in a file on your class disk called Notes.bak. This file will need to be restored to your PC. Select the week you want to see and click on the notes icon to view the information for the class. You can also print these notes, by using the printer icon on the PAF program.

Class exercises: You will be given a diskette containing the files you will use to complete the class exercises. Use this class diskette at home to practice with during the week. The class diskette will be yours to keep following the class. We will NOT do file backups when prompted by the computer during the exercises (as you would normally do). Instead, back up your PAF data file to this same diskette at the end of each class exercise. The class diskette containing the exercise files will also contain five lecture files to restore. Use it to refresh yourself with any topic that is needed.

Please label the diskette with your name as well as the class name:

Your first and last name
PAF 5.1 Class disk

Class recommendations: Complete each class exercise. Practice between class sessions. It is recommended that you read the "Getting Started Guide" listed in the PAF Help Menu. Optionally, you can work in pairs. Proceed at your pace. Remember the objective is not how fast you finish but how much you learn and retain. You may want to do the class exercise a second time.

The best way to learn and remember something is teach someone what you have just learned.

PAF 5.1 CLASS AGENDA

Week 1 :

- 1- PAF5 orientation - screen layout and navigation
- 2- Family, Pedigree, and Individual Views
- 3- Title, Menu, Tool, and Status Bars
- 4- File, Edit, and Search Menus
- 5- Advanced Search / Find
- 6- Class Exercise # 1

Week 2:

- 1 - Tool Menu
- 2- Preferences
- 3- Import function
- 4- Match / Merge function
- 5- Class Exercise #2

Week 3:

- 1- Export function
- 2- Standard GEDCOM
- 3- Submitting to Ancestral File and the Pedigree Resource File
- 4- Preparing names to use with TempleReady
- 5- Class Exercise #3

Week 4:

- 1 - Print Report function
- 2- Using multiple databases
- 3- Using Photographs and other Multi-Media with PAF 5
- 4- Class Exercise #4

Week 5:

- 1- PAF5 unique differences and features
- 2- Solving typical problems encountered when using PAF
- 3- Using PAF5 files directly with TempleReady for Windows
- 4- Suggestions and helps for running TempleReady for Windows
- 5- Class Exercise #5

PAF 5.1 Class Exercises

EXERCISE #1 - SEARCH / FIND FUNCTION

STEPS:

Note: Answers to questions are given in the (...)

1. Place Your Class diskette in the A: drive
Start the PAF 5 program and then click on File and then Restore Click on the file name "Class" and then click restore
2. Perform a search by clicking on find - this is the binocular in the tool bar. Find the record for Janea Thompson - be sure to enter as Last name, First. Read Spouse's name: (Keith Christensen) - what year was he born ? (1973). You will need to click OK, to be able to see the birth year.
3. Find record for Peder Madsen born 1736 (Careful: multiple Peder Madsen's) Click on "Advanced" then establish "Descendants" as a relationship filter Select his record and request 9 generations but don't include spouses. How many descendants does Peder Madsen have ? (104)
4. Using Peder Madsen's descendants use a field filter to determine:
How many are female AND were born in the month of July ? (4) Note: Make sure you use the Birth date that contains. Click on Define, double click Sex, (you should see 2 boxes, make sure they say Matches and Female), then click OK. Single click the word AND, double click on Birth Date, (the next box should have Contains in the top box and July in the second box), Click OK. Click OK again. Show the results by clicking the show results box and Save this filter definition with the name: Peder
5. Clear relationship and field filters and find James Fredrick Christensen How many Ancestors does he have in the first 8 generations? (870) In the relationship filter make sure it says Ancestors, then click Select.
(Check Include spouses, and one generation of descendants, the bottom box leave it blank)
What is the total number of names (entire file) qualified for baptism ? (80) How many of Fred's ancestors are qualified for baptism ? (17). You have to click on Field Filter, scroll all the way to the bottom and select Qualified for Baptism and double click. Click OK then OK again. After you are done make sure you click on 2 Clear buttons. This is because PAF will continue to add the filters the next time.
- 6) Click on File Menu and then "New". Enter your first name as the file name. Enter your name and address information. Enter a record for you, your spouse, and your parents. Just give the name and birth date and save it for each person. Back up this file to your class disk by clicking on File and then Backup. Keep the Class diskette to practice on during the week
7. Restore the Notes database and read the lecture notes for class #1.

EXERCISE #2 - PREFERENCES, IMPORT, AND MATCH/MERGE

STEPS

Create a temporary file and change Preferences

1. Restore your Class.bak file from your Class diskette as done in Exercise # 1
2. Create a new PAF file called Temp:
Click on FILE, select NEW, enter Temp and Save it In the Preferences Screen don't Enter your Name and Address, but instead: Click on the Folder Tab and enter where you want your PAF files stored (ie., C:\PAF5). If you enter a new location, PAF will ask you if you want it to create the folder for you. Then enter A: in the Import/Export line and also enter A: in the Backup line and click OK. Your files will now be restored and backed-up to the A: drive. (By clicking on the box to the right of Import/Export, you will be able to see the different drives you have on your machine. Just click on the A and then OK)

Import data into Temp file to review before importing into Class File

3. With the Temp.paf database open click on the IMPORT Icon on the Tool Bar Click on the file called FAMILY and then click on IMPORT, Click on OK to start import, look at the Notepad report and determine: How many records were imported (2) and where did they come from ? (Fred Christensen) Close the Notepad report by clicking on the X in its window.
4. Look at the data imported -- After examining the data, let's assume the data is all OK and you want to import it all into your main database (Class file).
5. Return to your class file by clicking on FILE and selecting Class.Paf. Click on the IMPORT Icon to import the FAMILY file, Select the FAMILY file and click IMPORT, then click OK. At this point you can read the instructions on how to link your data by saying YES or you can click NO. (usually say NO)

Match / Merge function to merge data and delete duplicate records

6. As the result of the import just completed, you now have two names in your file that have duplicate records (one is the original record and one was imported with additional data that needs to be merged). The two records are:

- 1- Jeremy Robinette - Born 1824 and married 1850
- 2- Margaret Long - Born 1835 and married 1850
7. You will need to merge the data for each record. Do the following:
 - a. Click on the FIND Icon, do a search for each name, write down the two RIN#'s for each name. There will be two duplicates for each name.
 - b. With the name highlighted, click EDIT and look at the detail record.
 - c. While in the detail record, click on the NOTES Icon and see the notes that will be combined.
 - d. Click CANCEL to get back to the search screen. Click OK to return to the Family View
8. You are now ready to merge the data and to remove the duplicate records.
 - a. Click on the MATCH/MERGE Icon on the Tool Bar. Don't do a filebackup. Click on "Names that sound alike & OK.
 - b. Click on the first FIND button and enter the first RIN# for the first name.
 - c. Click on the second FIND button and enter the second RIN #.
9. Select how you want the records merged:
 - Examine the two records - look for differences and which record you want to keep. The record on the right will be deleted after the merge.
 - The right record is always merged with the left (you can switch sides).
 - You can over ride what is in the left side by clicking on the right field.
 - You must click the box on the right field if you want it (even though the left side may be blank).
 - Click on MERGE when you are ready.
10. Observe how the data was merged to the left. Repeat step 8 to merge the records for the 2nd name. When done click Close to return to Family View.
11. In the Family View find and examine the detail record and the notes for Jeremy Robinette and Margaret Long to see how they were merged.
13. Delete the Temp file: Click on FILE and then DELETE.
Click on the Temp file and then click the DELETE button.
14. When you are through, Backup your Class file by clicking on FILE and then on BACKUP
15. Restore the Notes database and read the lecture notes for the "2nd Week"

EXERCISE #3 - EXPORTING GEDCOM TO ANCESTRAL FILE AND TEMPLE PREPARATION

STEPS

Standard GEDCOM

Restore your Class.bak file from your Class diskette

- 1.
2. Create a standard GEDCOM file by clicking on the EXPORT Icon.
Select GEDCOM 5.5 and then click PARTIAL to select records
3. Find John Currie Hill and with his name highlighted, choose "Ancestors" as the relationship filter and press SELECT.
Select 3 generations, 1 generation for descendents and don't include spouses or "All parents." Click OK. Check the number of names (should be 43) and click "show results."
Click OK and then EXPORT; enter Hill as the file name.
4. Now click EXPORT to write a GEDCOM with 43 ancestors to your diskette

Export GEDCOM to Ancestral file

5. Export another GEDCOM file: This time select ANCESTRAL FILE Note the flag on "Full Information on Living" is automatically turned off Click on partial to select records and click on SELECT, Notice records are still flagged from the previous export, so click on CLEAR
6. We want to submit to the Ancestral File all of David Hamilton Kerr's ancestors but without the Hamilton family. Therefore do the following:
Find David Hamilton Kerr, and with him highlighted, press SELECT Select 4 generations, 1 generation of descendents, include spouses, and just primary parents. Note how many names are selected (67).
7. Now select NOT for combining filters and click DEFINE for Field filters. Select NAME as the field by clicking on the > sign Select "Surname Only" and then type in Hamilton, click OK and OK again Note that there are four Hamilton families in the entire file. Two of the Hamiltons are ancestors and two are not. Hence names selected: $67 - 2 = 65$.
8. Click OK and then EXPORT; read the information screens and continue. Enter Kerr as the file name. Finally click EXPORT to write to your diskette.

Export GEDCOM to TEMPLEREADY

9. Click on the EXPORT Icon again and select TEMPLEREADY FOR WINDOWS. Click on the Select button to get to the search screen. Clear both filters of the previous search.
10. Click on any name and then use the up/down arrow keys to scroll the file.
Note the PAF detail record indicates which ordinances qualify to be done.
Why is Janet Clark not qualified ? (No birth date, no death date)
Why can't Elizabeth Morris be sealed to parents ? (No father or mother)
11. Click on DEFINE for a field filter; scroll the field selection to the bottom.
Select "Qualified for Baptism / Endowment" and then click on the > sign.
Click OK for "Is qualified"; click OK again to scan the file.
Note the number of matches (80); now click on "results" to see the records.
Click on a name and use the up/down arrow keys to scroll the results again.
12. Click on clear to remove the last search and select the following: Select Family for the relationship filter. Search for Alexander Bullock; click SELECT; How many were selected (9) Search for Jeremiah Casteel; click SELECT; How many names are now selected? (16).
Note: the number is cumulative. Click "results" to see them.
13. Click OK and then click EXPORT to write these names to disk.
Select just the names that qualify (PAF will include the needed records)
Note you can request to have "Sub todays date" placed in the ordinance dates of these records. Request this option as well as a Submission Report.
14. Enter TRprep as the name of your GEDCOM file for TempleReady.
Look at the Submission Report to see what names are included.
Why were only 6 of the 16 names included ?
15. Find Alexander Bullock, then show him in a Family View as a child with his parents. Does he have ordinance dates ? What does the small case letters mean ? Look at his detail record for the answer.
16. Backup your Class data file by clicking on FILE and then BACKUP.
17. Restore the Notes file and read the lecture notes for the "Third Week"

EXERCISE #4 - PRINTING REPORTS, USING MULTIPLE FILES, CREATING WWW PAGE, AND USING PHOTO'S

STEPS

Displaying Reports

1. Create a Family Group sheet for James F. Christensen using Preview Feature
2. Create a 4 Generation Pedigree report & display it using the Preview Feature
3. Create a Ancestry Chart using the standard chart and other defaults shown
4. Click on the Lists tab and display some reports using the Preview Feature

Create a Custom Individual Report

Note: Custom reports can be moved to different computers. You have to know where your PAF files are located on your computer and then copy the .lay file to a floppy disk. Then you copy that file from the floppy to the next computer.

1. Click on the Printer icon, then on Custom Reports
2. In the Title field, type Individual Ordinances.
3. In the Report Layout area, click Fields..
4. Double-click on the following fields in the order given:
 - a. Surname, Given (25)
 - b. Sex (4)
 - c. RIN (6)
 - d. Birth/*Chr Date (14)
 - e. Birth/*Chr Place (30)
 - f. Father (18)
 - g. Mother (18)
 - h. Baptism Date (13)
 - i. Baptism Temple (8)
 - j. Endowment Date (13)
 - k. Endowment Temple (8)
 - l. Seal/Parents Date (13)
 - m. Seal/Parents Temple (8)
5. Highlight each of the above listed items a-m. On each item click on Custom Options button and change the Width Charters to the numbers in the (...) And click OK on each one. After you have finished each one then click OK
6. In the Report Layout area, click Sort Order, double-click Parent's MRIN (you can also use Surname, Given if you want it alphabetically) and then click OK.
7. On the right side, click Page Setup
8. In the Orientation area, select Landscape, and then click OK

9. Click on Fonts, change each of the following to 7pt: Title, Header and Body.
10. Click OK
11. Click Save As
12. Type Individual Ordinances in the box and click Save
13. You can now either Print the file to the printer or print the file to your word processor.
 - A. To print to the printer - click Print
 - B. To print to your word processor - click in the Print to File box on the bottom right corner, click Print. The Save As box comes up. Save the file where you save your word processing files, type the name of the file and click Save. This feature lets you add information and re-save the data. Very nice feature.

To Create a Sealing to Spouses Report

1. Click on the Printer Icon
2. Click on the Custom tab
3. Type Sealing to Spouse in the title field
4. In the Report Layout area, click Fields
5. Double-click on the following fields in the order given (you will not need to adjust the width of the columns unless you are using a larger font):
 - a. Surname, Given
 - b. Sex
 - c. RIN
 - d. Spouse
 - e. MRIN
 - f. Marriage Date
 - g. Marriage Place
 - h. Sealed to Spouse Date
 - i. Sealed to Spouse Temple
6. In the Report Layout area, click Sort Order, double-click Sex and Surname, Given, and then click OK. This will allow you to search for the males first and then any females that have not been found.
7. You can now either Print the file to the printer or print the file to your word processor.
 - A. To print to the printer - click Print
 - B. To print to your word processor - click in the Print to File box on the bottom right corner, click Print. The Save As box comes up. Save the file where you save your word processing files, type the name of the file and click Save. This feature lets you add information and re-save the data. Very nice feature.

With these 2 reports you will be able to search the Internet IGI for missing ordinance dates.

Create / Change / Display Multiple Files

1. Click File, Restore, then click on Notes5. This is from your Class diskette (or open it if restored before)
Use the Window menu to switch back/forth between files. This will show if you have multiple files open.
2. Click on the WINDOW drop down menu and select "Tile Vertically"
Click one side & edit some names, then click on the other side & do the same

Copy / Paste Notes

1. Click on the Class.paf file, click on the FIND Icon, and find the record for William Kerr, born in 1773. With his record highlighted click OK, click on the EDIT NOTES Icon on the Tool Bar. Click on the note with the left mouse button and hold it while dragging down and across the note. RIGHT click on the highlighted area, click on "COPY", and then click CANCEL.
2. Now click on "First Week" on the Notes database. Then click on the EDIT NOTES Icon. Hit the ENTER key twice to space down to make room, then move the cursor back to the top of the screen again. Now RIGHT click on the highlighted area, and then click on "PASTE" to paste the note. Click SAVE to save the note and close the Notes file (click the X).
Expand Class.paf to full screen by clicking on the box.

Load and Display Photos

1. Find the record for: Ephraim White and click OK to go to the Family View.
2. Click on the Multi-Media Icon (Camera) on the Tool Bar
Click on Add and then Browse. Click on the drop down arrow in the "Look in" box. Then click on A: to look for photos on the diskette.
Select the photo called Bruce, wait till name highlights, click open, Click on caption and enter: "Bruce Christensen Family," Click Ok, and then Click Show to see photo. When through close the photo by clicking X.
3. Click on SLIDE SHOW to see the Photos presented in sequence.
(Note: Normally you would show all the photos for one person - This is just a random sampling of photos for illustration). Click on Scrapbook to see the photos together. When through click CLOSE and then click SAVE.

Open the Notes file and read the lecture notes for 4th Week.

EXERCISE #5 - PAF5 DIFFERENCES AND SPECIAL FEATURES

Using the Individual View

Click on the Individual View tab. Change the order of the listing by clicking on the column heading called "RIN." Note the direction of the arrow - click on the "RIN" heading again to reverse the order. Click on the "Full Name" column heading and then click on it again to reverse the order. Click and drag one of the headings to a different location. Now click and drag that same field back to its former location. Now select one of the names in the list and then click on the Family View tab to view that person.

Templates

Generate a new data entry template called "Enter dates." Double click on any name to go to the detail record. At the bottom click on the drop down arrow in the "Template" box and click on "Define a New Template." Click on the "Add" button. Enter "Enter Dates" as the title. After clicking OK you get a listing of the possible groups of fields. Drag and drop the "LDS Ordinances" group on "Enter Dates." Click on the + sign for "Personal." Drag and drop the RIN, Full Name, and Sex. Click on the + sign for "Events." Drag and drop Birth. Click Ok and return to the detail record. Click on the Template drop arrow and select "Enter Dates."

To delete the created templates. From the **Tools** menu, select **Preferences**. Click the **Templates** tab. Highlight the template that you want to delete and click **Delete**.

Global Search and Replace

Use the Global Search and Replace Function to remove the "Submitted" date information you placed in Alexander Bullock's record during exercise #3. Click on Tools and then Global Search and Replace. Click on the drop down arrow and select "dates." Click on the "Search for" window and enter "Sub dd mon 2001" (where dd is the day you did exercise #3 and mon is the month you did it. If you don't remember, do a search for Alexander Bullock and look at his record for the date). Leave the "Replace with" window blank. Click the "Replace" button and then go to Alexander's record and verify that the function worked properly.

Eliminating an unwanted "Unknown Spouse"

Search and find Robena Beveridge using RIN# 139. Click on the "Other Marriages" button and then select the "Unknown" Spouse such that it shows as the spouse in the Family View. Since Robena was only married once, we want to get rid of the "Unknown" spouse. Double click on the "Unknown" spouse. Enter the name of just "Robena" and save it. Click again on the "Other Marriages" button again.

Use the two RIN numbers to do a match/merge to delete the "Robena" record.

Open the Notes file and read the lecture notes for 5th Week.

Eleven Simple Steps to Prepare Names for the Temple

- Step 1: Identify and find your ancestors on the Ancestral File or the Pedigree Resource File at the Family History Library or a Family History Center. Then download these ancestors as a GEDCOM file onto a diskette.
- Step 2: Set up your own file on PAF. Enter your name and any names between you and the names you found on the Ancestral File or the Pedigree Resource File. Import the file of names you downloaded on diskette into your file. Use match/merge to connect these names to your names on the PAF file. Backup your PAF file to diskette.
- Step 3: Restore the file to your PC at home if the previous work was done at the Family History Library (FHL) or Family History Center (FHC). Use PAF to identify which names that potentially need ordinance work.
- Step 4: Take a backup of your file to the FHL or FHC. After restoring your file close PAF and run TempleReady for Windows against your PAF file to update your records with ordinances that it finds on the Ordinance Index. When you are through, backup your PAF file again to diskette.
- Step 5: Restore the updated file to your PC at home. Use PAF to identify and print a report showing those names still needing ordinance work.
- Step 6: Use the printout to look up names on the Ordinance Index. Write the ordinance dates on the report for the names that you find.
- Step 7: Open your PAF file and enter the dates for the names you found on the Ordinance Index. Backup your PAF file again to your diskette.
- Step 8: Use PAF Insight to check the IGI for the most current ordinance dates. You can manually check the IGI if you prefer not to purchase PAF Insight.
- Step 9: Use PAF to select the names that still lack ordinance work. Submit these names to the TempleReady program. It will process the names and prepare a printed report and a Temple Submission file on diskette
- Step 10: Take the diskette to the temple, receive the ordinance cards, and perform the ordinance work. Be sure to update your PAF file with the ordinances after they are done.
- Step 11: Find missing information on existing names on your file that could be done. Also, research and find new names on the end of your lines.