

The Memo

By Martha Grenzeback
24 July 2008

The **Memo** is an unlimited field which will hold unlimited text. It can be used for any comments or further information about the name or event in question, and, depending on its location and purpose, will print in reports or not, as the user prefers. It is a great tool for adding freeform text and miscellaneous information to both your database and your reports. There are Memo windows in many parts of the program, including the Tag Entry screen, Source Definition, Repository Definition and others. (The Citation Detail, although not called a Memo, works the same way as a Memo, and I have included it as such.) You can use the entire memo field by using [M] in your sentence structure.

Tag Entry

Tag type: Death

Principal: 2905

Name: Lamira TRAVELLER, (1841-1901)

Date: 02 Apr 1901

Sort date: 02 Apr 1901

Place style: U.S. StandardPlace

Address: Billings Bridge

City: Gloucester

County: Carleton Co.

State: Ontario

Memo

Sentence

Citation

Source: 1220

Citation Detail

Citation Memo

Repository Definition

Repository # 57

Abbreviation: IA, Jasper Co., Newton Union Cemetery

Name-ID #: 0

Name-Other: Newton Union Cemetery

Place style: U.S. StandardPlace

Address: -1601 W. 4th St. N.

City: Newton

County: -Jasper Co.

State: Iowa

Country:

Postal: -50208

Phone: -(641) 792-71

LatLong:

Temple:

Memo

OK Cancel

Source Definition

General Supplemental Attachments Output form

comments

Reminder

Memo Fields in General

To Zoom to a Larger Memo Window:

Press [F7] or the [Memo] button to open a larger Memo window.

Formatting Text in a Memo Field

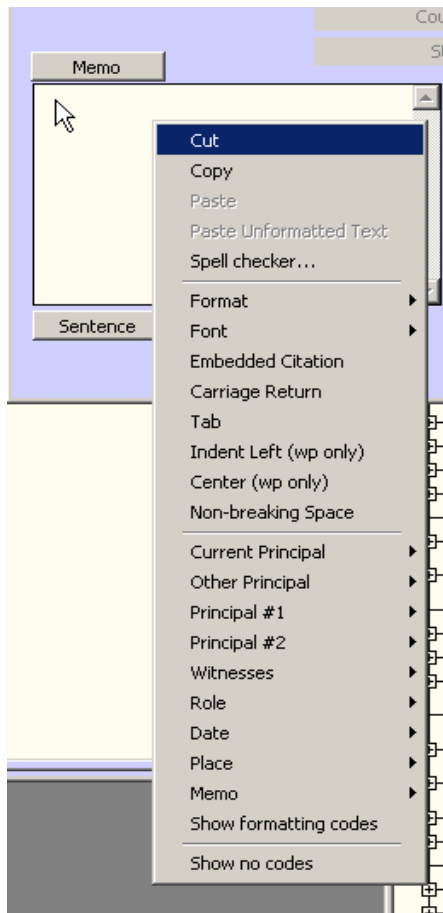
Every memo field has a right-click menu that contains Cut, Copy, Paste, Paste Unformatted Text, and Spell Checker. Tag memos have format, font, and other codes as well. You can also use the Edit menu when in the memo field. If you want to control the output of specific words or phrases within a memo field—italicize them or make them bold, for example—you can enclose those words or phrases in embedded format codes. When the memo is sent to the printer, your Windows printer drivers will recognize the embedded codes and modify the output accordingly.

Embedded format codes must adhere to a specific format:

[CODE:]text[:CODE].

Text: This is a test of [BOLD:]embedded[:BOLD] format codes.

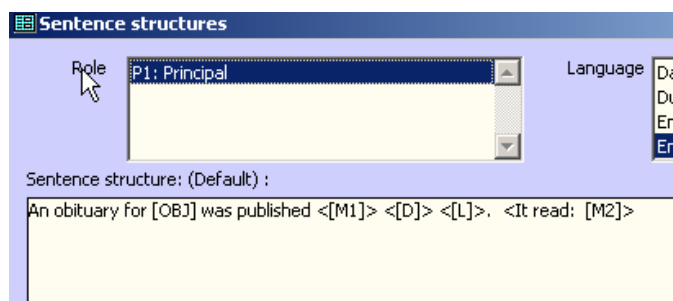
Output: This is a test of **embedded** format codes.



Splitting a Memo Field

A great tool in TMG is the ability to split the Memo field; you can have up to nine separate parts ([M1]-[M9]). [M] is always the same as [M1]. Vertical lines in the Memo field between the various pieces of information allow each part of the field to be treated separately, which gives you great flexibility in creating sentences, structuring sources, or controlling what prints in a report. For example, I use the split memo in the Citation Detail to provide the more specific census information relevant to a particular household. The reminder window introduced with TMG 7 is a good way to remember what you normally put in each part of the Memo field.

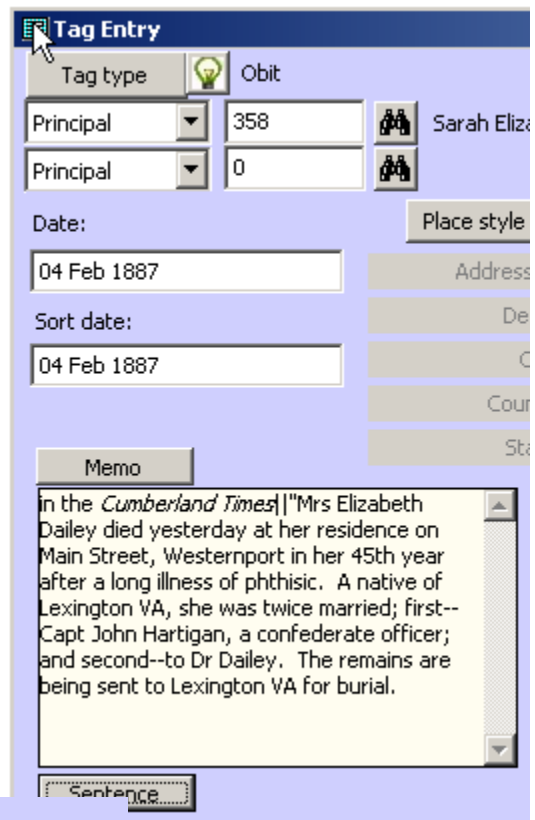
Here is my sentence structure for an obituary tag, with the option to include the text of the obit or not (I've been moving away from that).



If I didn't want to put in the text of the obit, I would just leave the part after the || sign blank, and nothing in the conditional brackets would appear.

Another possibility, if I wanted to see the text in the tag but not print it, would be to put the non-printing symbol “-“ in the second part of the memo:

||-“Mrs. Elizabeth....etc.”



Preview

An obituary for her was published in the *Cumberland Times* on 04 Feb 1887 in Cumberland, Allegany Co., Maryland. It read: "Mrs Elizabeth Dailey died yesterday at her residence on Main Street, Westernport in her 45th year after a long illness of phthisic. A native of Lexington VA, she was twice married; first--Capt John Hartigan, a confederate officer; and second--to Dr Dailey. The remains are being sent to Lexington VA for burial.

Here is another example. I usually use the memo in death tags to provide cause of death (when I know it), plus other information.

The sentence would then read:

Henry Thomas died of "cardo-renal-vascular" causes, complicated by nephritis on 13 Nov 1930 in the home of Jesse Baker, Dayton, Montgomery Co., Ohio at age 81. Death took place at 4:30 on Thursday afternoon.

If I had no information in M1, since it is in conditional brackets, the sentence would simply read

Henry Thomas died on 13 Nov 1930 in the home of Jesse Baker, Dayton, Montgomery Co., Ohio at age 81. Death took place at 4:30 on Thursday afternoon.

(I should really have the second part in conditional brackets, too, but I only noticed after I'd pasted the thing).

An important thing to remember is that if you use multiple split memo parts, you should always use a "place holder" space in any empty memo parts. (Could not find out why, though.... ☹)

For example, use:

|| || ||Private||the 23rd Virginia Regiment (Memo parts 1, 2 and 3 are empty in this example); don't use:

|||||Private||the 23rd Virginia Regiment.

Result: He was a private and served in the 23rd Virginia Regiment.

Calling an External Text File from a Memo Field

In addition to text entered into Memo fields within the program, you can store a memo in an external text file that can be called from the memo field. Such text will be used when a report is generated just as though it had been entered directly into the memo field. To use text from an external file, an exclamation

point must be the first character in the memo field, followed by the drive, path and name of the text file. For example: **!C:\temp\Striders Mill.txt.**

You can edit the memo field, changing or deleting the path/filename as you would any other text. To edit the external text file, put the cursor in the memo field of the Tag Entry screen, press <F7> or click the [Memo] button.

You may place a split field marker (||) after the file name if you wish. A comment can then be included in the [M2] portion of the memo. For example:
!C:\temp\Striders Mill.txt ||This is a transcription of the deed.

Sentence Variables in Memos

Variables such as those used in the Sentence field can also be used in memos. However, variables within the memo field will print in reports only when the memo is used in a sentence—for example,

[<CR:>][P+] died <[M]> <[D]> <[L]> <[A]>. <[M2]>

If the memo is used in a footnote or endnote, the variables are not included.

Controlling the Display of Memos

In a Tag, the contents of a Memo will normally appear as directed by the sentence structure. However, Memos that are NOT part of the sentence can still be printed by use of the options offered under the Memo tab on the Report Definition screen.

The screenshot shows the 'Report Options' dialog box with the 'Memo' tab selected. The 'Memo' tab is highlighted with a mouse cursor. Below the tab, the text 'Memos that are not included in the sentence :' is displayed. There are six radio button options: 'None', 'Footnotes', 'Endnotes', 'Unique' (with a small square icon), 'Embedded', and 'Embedded with parentheses'. The 'Embedded' option is selected. Below these options are three checkboxes: 'Include name memos' (unchecked), 'Include relationship memos' (checked), and 'Include memos from witnessed events' (unchecked).

Such memos may be printed as *footnotes* or *endnotes*, *embedded*, or *embedded in parentheses*. If you choose to have them print as endnotes, they may be accumulated over several reports. If you select *None*, then no footnotes or endnotes will print, nor will the memo be embedded in the report.

NOTE: This option works in conjunction with the Miscellaneous tab on some reports, such as Individual Detail or Family Group Sheet. The option on the Memos tab applies only to memos that *are not* included in an event sentence ([M]). The option **Embed Sentence [M]emo** on the Miscellaneous tab applies only to memos that *are* included in the event sentence.

Clicking Footnotes or Endnotes provides a way to have information in the Memo field of a Tag appear as a note rather than in the body of the text.

Choosing Embedded, either with or without parentheses will embed the contents of the Memo field in the text generated by the Tag, after the text produced by the sentence structure. If you opt for no parentheses, the Memo text is set off by a semi-colon. Although this gives you a little less control over the exact placement of text than the sentence structure does, it does allow you to decide each time a report is generated whether to include the Memo in that report.

These options have no effect if the sentence structure contains a variable for the Memo ([M]). In addition, they apply to the *entire report*, so they will apply to every Tag. Finally, they can cause Memos to be printed in witnessed events, which may not be desirable—you can avoid this by using the <[M0]> variable in the Witness sentence. This solution can also be used to prevent the Memo for a Principal from printing for every single Witness to the Tag.

Speaking of Witnesses, a great innovation of TMG7 is the ability to create a separate Memo specific to the Witness. The witness memo can be referenced in the sentence using the variables [WM], [WM1] ... [WM9].

Further choices on the Report Definition Screen:

1. Check **Unique** if you want footnotes/endnotes to print each memo only once. Subsequent identical memos will be given the same footnote/endnote number as the first. This option is available only for outputting footnotes/endnotes directly to screen or printer.
2. Check **Include name memos** if you wish to include memos recorded in name tags. They will be reported immediately following the name.

3. Check **Include relationship memos** if you wish to include memos cited in the parent-child relationship tag when the subject is the child. They will be reported immediately after the primary name of the child.

4. Check **Include memos from witnessed events** if you wish to include the memo fields in witnessed events. When turned off, this will prevent the event memo from appearing as a **footnote/endnote/embedded note** for each witness. (To prevent the memo from appearing in the **witness sentence**, remove the reference to [M] from that sentence structure.)

NOTE: If the memo is included directly in the sentence construction and printed in the main part of the report, then it is not available for use as a footnote or endnote as controlled by the Report Definition for that report. Therefore, if you are using the memo field for information you want to include in end- or footnotes, do not include the [M] in your sentence and be sure to check the option to embed the memo as a footnote or endnote when you print report(s).

Specific Kinds of Memos

Citation Memo

The Citation Memo field is designed to hold comments, rationale, etc., that is separate from the Citation Detail and is not necessarily intended to be output. Some people use it for transcriptions or summaries of the source. However, it can be referenced by the new source template variables [CM], [CM1]...[CM9].

Repository Memo

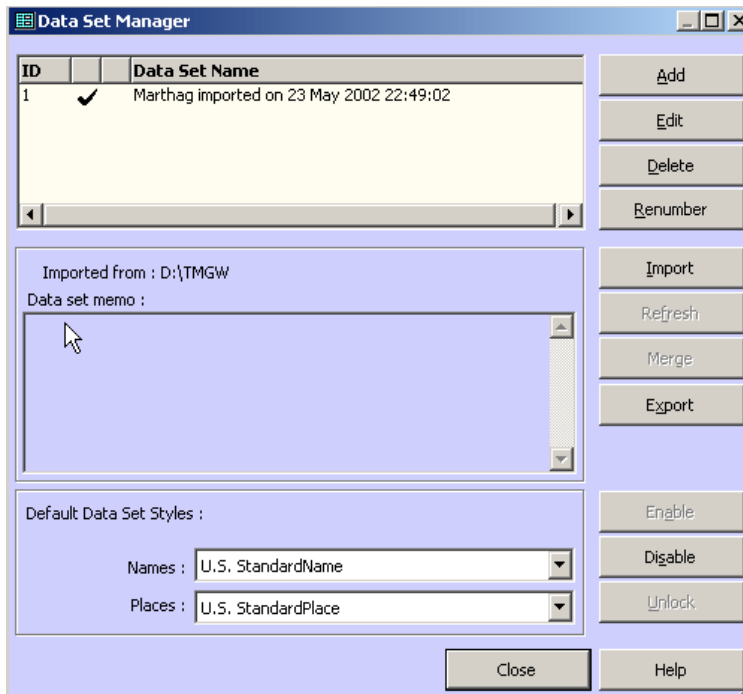
Source output can now include the contents of the repository memo. The source template can refer to [REPOSITORY MEMO], [REPOSITORY MEMO1]...[REPOSITORY MEMO9]. Shorter versions of the same variables, [RM], [RM1], [RM9], are also supported.

The screenshot shows a web form titled "Repository Definition". It contains the following fields and values:

- Repository # 44
- Abbreviation : IA, Floyd Co. Clerk
- Name -ID # : 0
- Name - Other : Floyd County Clerk's Office
- Place style : U.S. StandardPlace
- Address : -101 S. Main St.
- City : Charles City
- County : -Floyd Co.
- State : Iowa
- Country :
- Postal : -50616-2756
- Phone : -(641) 228-7111
- LatLong :
- Temple :
- Memo :

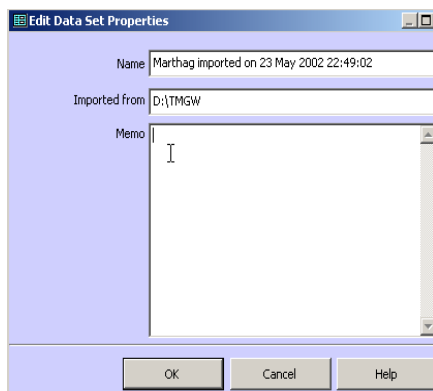
Memo for a Data Set

A Memo field is provided for notes about each data set. Any special information pertaining to each data set is recorded here. This field is read-write and unlimited. This field might contain information to help remind you about how you obtained this data set, who its original owner was, etc. When a data set is imported, the researcher name and address (if included in the original data set) are imported and added to the end of the data set memo.



To access the Data Set Memo:

1. Select File > Data Set Manager.
2. Highlight the data set of your choice.
3. Click on the [Edit] button.
4. Use the scroll bars, if necessary, to view or edit the entire memo.



Thus ends what I currently know about Memos.....