

The Pocket Genealogist program does not take the place of your current desktop genealogy program.

The **Pocket Genealogist** actually consists of two programs. The primary program installs on the handheld device, and a "support program" is automatically installed on a Windows desktop or laptop computer. The support program converts desktop data (TMG) to the proper format for the handheld and then transfers that data, using Microsoft's ActiveSync program the same way as other PocketPC and Windows Mobile applications. The support program also later retrieves data from the handheld, storing it on the desktop. The same support program also performs a few other housekeeping tasks.

The import process asked a number of questions about the data to be imported, such as which data elements to import, whether or not to add commas at the end of place names, convert surnames to all upper case (or not), and similar formatting options. Depending on the database being imported, you may have options to import regular notes, research notes, medical notes, marriage notes, LDS ordinances, addresses, telephone numbers, ZIP codes, and more. Obviously, this works only if similar items are in your original database. Not all genealogy programs support all of those data elements.

You can store the handheld's information either in the handheld computer's main memory or on an extra memory card, if available. On most handheld devices, you can purchase storage cards (Compact Flash, Secure Digital, etc.), which can hold programs and data. Note that those cards are a lot slower than "main" memory.

The import process also asked if you wish to import information about all the people in the originating database or if you wished to limit it to a subgroup, based on any of several selection criteria. After entering selections on a number of screens, select START. All the data was converted to *The Pocket Genealogist's* internal format and then was copied to the handheld device.

The primary screen features a 3-generation view of your data. The layout of the screen is divided into 4 areas.

1. Current Couple - In the middle of the screen are the male and female who make up the currently selected "couple." All other information on the screen relates to this "Current Couple".
2. Children are listed in a scrollable list below the current couple.
3. Marriage or union information is displayed immediately above the current couple. To the left are buttons to select other spouses or parents for the male and to the right for the female.
4. Parents are displayed above the marriage box.

The default setting of The Pocket Genealogist is to always display black letters on a white background. However, it is easy to select colors and to set the color of data fields that you can edit as well as those that you cannot edit, as well as the background and text color for push buttons, list columns, and text within the list. You can have the father's information shown in one color, the mother's info in a different color, the marriage information in a third color, and so on. Font sizes are also adjustable, a handy feature when information is displayed on a tiny screen.

The 3-generation screen is used both to navigate through the database and to view information about the currently selected couple. Using your stylus, you can tap on one of the parent boxes. That person will become the "current couple," and the other information on the screen will change, relative to that person. The same is also true for the child list.




























Tapping on either person of the "current couple" will display more information about that person. Tapping on the marriage box will display family information about the "current couple". Tapping














on the spouse and parent icons will display a selection dialog where you can choose a different spouse or set of parents to display.

If you have a GPS device and software that is already working on your handheld computer, *The Pocket Genealogist version 3* can retrieve the current GPS coordinates for use with locations, repositories, addresses, and notes. The later use of the coordinates depends on the capabilities of your desktop genealogy program.

- Descendant and Ancestor Tree View
- Individual View (new with Version 3) will show a scrollable list of all the individuals in your database. Individual information will display a series of tabs with information for that individual.
- The "Main" tab is used to display the main information about the individual. This would include the primary name, the sex of the individual, a "living" indicator, ancestor and descendant interest settings, and other items.
- The Names tab is used to work with the primary and secondary names for the individual.
- The Events tab lists the events of the person's life. The exact list of events shown varies, depending on the desktop's database from which the information was created.
- The Notes tab is for entering notes about the individual. Depending on the desktop genealogy program you are using, you may be able to enter many notes. Pocket Genealogist splits notes up into roughly 30,000 characters per "chunk" (because of database limitations and speed considerations). If the note in question has more than 30,000 characters, you will see buttons that will allow you to switch between the "chunks" so that you can see the entire note.
- The Sources tab lets you see all the citations that are attached to all items at the individual level. The drop down list allows you to pick the type of citations you wish to see in the lists.
- The LDS Tab is used to display the LDS Ordinances (if any) for the individual.
- The To Do tab will be displayed if your desktop genealogy program supports that type of information.
- Field Notes are never transferred back into your desktop program. However, the desktop side of Pocket Genealogist lets you display on your monitor any information you enter here, using its Field Note reporting feature. How you use Field Notes is entirely up to you. You may decide to enter them as notes into your desktop program or simply print them for later reference.
- The DNA tab provides a means to view/edit DNA information for the individual, if supported by your desktop genealogy program.
- The Identifiers tab shows some additional ID fields as defined by your desktop genealogy program.
- The Relationships tab is only available for The Master Genealogist imports. This tab shows the relationship information for the individual, both backwards (as a child) and forwards (as a parent).
- Family Information displays a series of tabs with information for the "current couple" (family).
- A Date Calculator to calculate a second date based on a first date and the number of years, months, and days between the two.
- A Calendar that displays months in any year. You can use the calendar to pick the date or the calculator to derive a date based on the number of years, months, or days from another date.
- A Soundex Calculator is used to calculate the Soundex code for a name.
- A Coordinates Converter allows you to enter a latitude and longitude value and then convert it to a different format.
- A Relationship Calculator is used to determine the relationship between two individuals.
- A History List keeps track of the individuals viewed during a Pocket Genealogist session. You can quickly backtrack to records that you viewed earlier.
- The Date Selector allows you to assign a date qualifier to any date being entered. This can be useful for things such as "Before" or standalone items such as "Dead". Stand-alone items make up the entire date value, and no actual date is allowed.

Meaning of Icon Buttons in Pocket Genealogist

Button	Use (Not all functions are available for all imports)
 	"Address" - used to invoke the address screen. If the icon is in color, address information exists for this item.
	"Add a source citation" – this is used to add a source citation to the current item. This button is always in color.
 	"List of Source Citations" – this button display a list of source citations for the current item. If the book icon is red, source citations exist for the item.
 	"Note" – this is used to display the note screen. If the icon is in color, a note exists for this item.
	"Add" – this is used to add an item.
	"Edit" or "Open" – this is used to edit/view/open an item.
	"Delete" – this is used to delete an item.
	"Set to preferred" – this is used to set the selected item to either "primary" or "preferred" (depends on context).
	"Link to existing Individual" – this is used to link to an existing person such as linking a new child to a set of parents.
	"Unlink the individual" – this is used to unlink a person such as unlinking a child from a set of parents but not deleting that person.
	Used to display a relationship list for the current individual. (Shows parents, spouses, and children of that person).
	Part of the menu and is used to navigate through the "history" list. The square box brings up the history list for selection. The backward and forward buttons move to the previous or next person in the "history" list.
	"Clear" – this is used to clear the text in the edit field.
	"Undo" – this is used to reverse the last action or to reset the text (Generally on edit screens).
	"Find/Lookup" – this is used to lookup information in the database such as Surnames or Locations.
	"Save" – this is used to "save" the sort order (Legacy events for example).
	"Sort the List" – this is used to "re-order" the list back to its original sequence. (Legacy events, for example)
	This set of buttons is used to change the order in a list. (Legacy events for example)
 	"Sort Date" – this is used to display the Sort Date. (TMG Events for example). When the icon is in color, this indicates a sort date exists for the current item.
 	"2 nd Date" – depending on import, could be an End Date or a Status Date (such as marriage ending status date). If the icon is in color, a date exists for the event.
 	"To Do" – this is used to display the To Do list. If the icon is in color, To Do's exist for the current item.

	<p>"Latitude / Longitude" – this is used to display latitude and longitude information. If the icon has a blue background, latitude and longitude values exist for the current item.</p> <p>Can also signify a display for changing the display language or the character set used for "Find By" keypads.</p>
	<p>"Parents list" – this icon will show a list of parents for the selected person in the tree. If more than one set of parents exist, the icon will be in color. A person selected from the parent list becomes the new "root" person in the tree.</p>
	<p>"Spouse list" – this icon, either female or male, will show a list of spouses for the selected person in the tree. If more than one spouse exists, then the icon will be in color. A person selected from the spouse list becomes the new "root" person in the tree.</p>
	<p>"Children list" – this icon will show a list of children for the selected person in the tree. If you select a person from the children list, they become the new "root" person in the tree.</p>
	<p>"Expand All" – this icon which is found when in "Tree" view, will expand all levels for the selected individual. If you select the "root" person in the list and press this button, all branches of the tree at all levels will be expanded. Use this with caution as sorting occurs for the children of each level the first time they are expanded. If you expand all at once, it may take some time to expand depending on the number of individuals and levels.</p>
	<p>"3 Generation View" – this icon will switch to the "3 Generation" view for the selected person in the tree.</p>
	<p>"Ancestor Tree View" – this icon is used to switch to the Ancestor tree view. If you are already in either tree, the selected individual in the tree becomes the root for the view. This is handy for quickly navigating up and down a tree.</p>
	<p>"Descendant Tree View" – this icon is used to switch to the Descendant tree view. If you are already in either tree, the selected individual in the tree becomes the root for the view. This is handy for quickly navigating up and down a tree.</p>
	<p>"Refresh" – this icon is used refresh the display. (For example, the "Databases" lists)</p>
	<p>"Close" – this icon is used to close the currently open database.</p>
	<p>"Backup" – this icon is used to create a backup of the selected database. This is only available in the "Advanced" version of Pocket Genealogist.</p>
	<p>"Restore" – this icon is used to restore a backup. This will overwrite the database with the same name on the device. This is only available in the "Advanced" version of Pocket Genealogist.</p>
	<p>"Add item to Research List" – found on Individual, Family, Source, and Repository screens and allows you to add that "Item" to a Research List.</p>

Main Names Events Notes Sources
 Given: Asa Clark
 Surname: Brown
 Sex: ☒ Male ☐ ? ☐ Female ☐ Other
 Anc Int: 0-Very Low
 Des Int: 0-Very Low
 Living: ☐ Yes ☒ No
☐ Private
 RIN: 1

Main tab (Individual)

The “Main” tab is used to display the main information about the individual. This would include the primary name, the sex of the individual, a living indicator, ancestor and descendant interest settings and other items. Some or all of these values may be disabled or hidden depending on the source of the import.

If applicable for your type of import, you can also set/view Source Citation information for the individual from this screen, view/edit the individual address information, or add this person to a Research List.

Names tab (Individual)

The names tab is used to work with the primary and secondary names for the individual. The above two examples show some of the differences that can occur based on the source of the import.

Main Names Events Facts Sources
 Type: *Name-Var
 Prefix:
 Given: Frank
 Surname: Alexander A425
 Suffix:

Type	Detail
*Name-Var	Alexander, Frank
Name-Var	Alexander, Franklin
Name-Var	Alexander, Rev. Frank

Events tab (Individual)

The events tab, as with most Pocket Genealogist screens, can greatly differ depending on the source of the import. However, the events applicable for that individual will always appear at the bottom of the screen in a list and selecting an item in that list will display the information in the area above. Some imports will have text buttons next to the view field which when pressed will toggle between different display fields. In the example on the right, the “Place” field will toggle between “Place” and “Temple” when pressed. Additionally, with some events, the fields may not be applicable and will be disabled. In the example on the left, the “Cause” field is not applicable for this type of event.

Also, depending on applicability, you may have a roles (witnesses) field, a sort date field, address button, note button, To

Main Names Events Facts Sources
 Type: Birth Principal
 Date: 3 Oct 1838
 Place: Elizabethton, Carter County, Tenn

Type	Date	Value
*Birth	3 Oct 1838	Elizabeth
w-Census	1840	Carter Co
w-Census	9 Sep 1850	Carter Co
Education	Cir 1854	Elizabeth
Education	Cir 1858	Washingt
w-Census	1 Jun 1860	Elizabeth

Do button, a 2nd date button, source citation buttons, a “Private” flag and other options. Pocket Genealogist uses “profiles” to control this behavior and will also only allow the types of events applicable for the desktop genealogy program you are using. It would do no good to allow you to enter information that your desktop program is incapable of handling.

Note: Primary Events may appear either at the top of the list or be interspersed (usually sorted by date) in the event list. Primary events (Birth, Christening, Marriage, Death and Burial) are noted by the use of the asterisk.

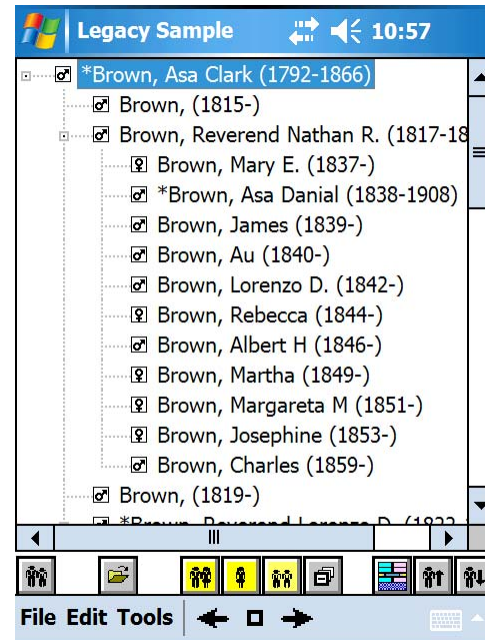
Note: If your desktop program supports witnesses, the events for which the person is a witness will be marked in the list preceded with a “w-”.

Descendant and Ancestor Tree View

The Descendant Tree View (shown) shows the descendants of the current couple. By default, only the first generation of the current couple is expanded. If you wish to expand or contract a branch of the tree, press the “+” button. There are 4 pieces of information displayed on each line of the tree.

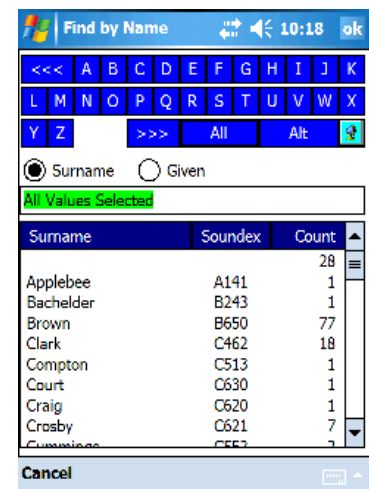
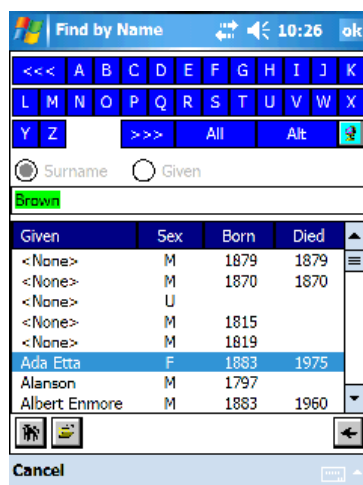
1. The name of the person.
2. The birth/death date of the individual.
3. The sex of the individual is represented by the “Male” or “Female” symbol. Unknown is represented as a question mark.
4. The living indicator. If the person is marked as living, the sex icon will be in color. (No living individuals are shown in this example.)

The “Basic” level of Pocket Genealogist allows up to 3 generations per tree. The “Advanced” level can have up to 255 generations.








Find by Name

You can search for individuals in your database by references to given or surname. You can do the search from the “Tools”, “Find”, “by Name List” menu item. The “Find” display allows you to pick the first letter of the name and will display a list and how many references there are for that name. The example to the right shows the result of pressing “All”. Select an item in the list and details of the names using that value are displayed.

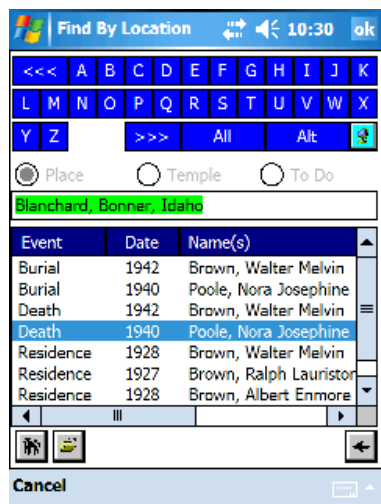


Select an item in that list and press “OK” to make that person the selected individual in the view you are using.

	Used to display alternate keys in the keypad area such as numerals and diacritics.
	This displays alternate character sets you can use for the "Alt" display. (Greek for example)
	Allows you to return to the summary screen instead of starting over with the search.
	Shows the immediate relations for the person selected in the list.
	Displays the Individual screens for the person selected in the list.

Find by Location

You can search for individuals in your database by references to locations that they use in Events. You can do the search from the **"Tools", "Find", "by Location List"** menu item. The "Find" display allows you to pick the first letter of the location and will display a list and how many references there are for that location. The example to the right shows the result of pressing **"All"**. Select an item in the list and more details will be displayed.



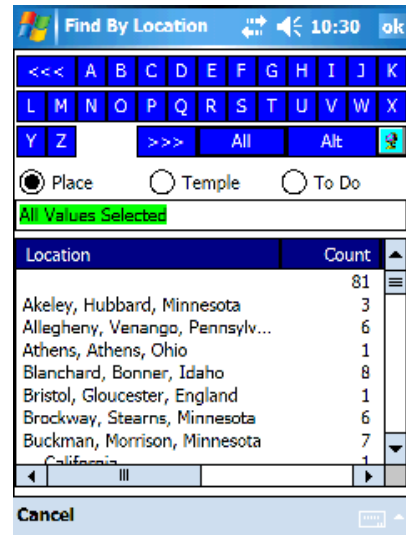
Find By Location 10:30

Location Count

Akeley, Hubbard, Minnesota	81
Allegheny, Venango, Pennsylv...	3
Athens, Athens, Ohio	6
Blanchard, Bonner, Idaho	1
Bristol, Gloucester, England	8
Brockway, Stearns, Minnesota	1
Buckman, Morrison, Minnesota	6
California	7

Event Date Name(s)

Burial	1942	Brown, Walter Melvin
Burial	1940	Poole, Nora Josephine
Death	1942	Brown, Walter Melvin
Death	1940	Poole, Nora Josephine
Residence	1928	Brown, Walter Melvin
Residence	1927	Brown, Ralph Lauriston
Residence	1928	Brown, Albert Enmore



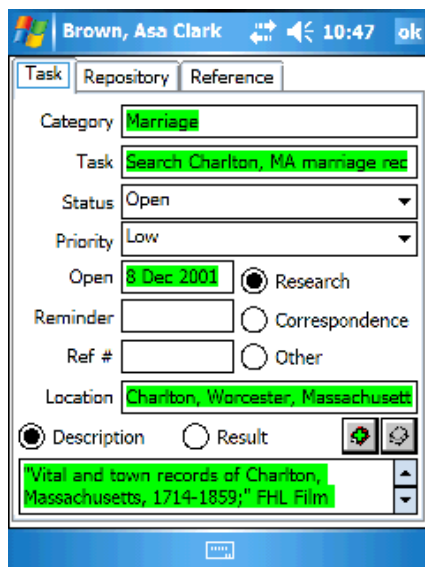
Find By Location 10:30

Location Count

Akeley, Hubbard, Minnesota	81
Allegheny, Venango, Pennsylv...	3
Athens, Athens, Ohio	6
Blanchard, Bonner, Idaho	1
Bristol, Gloucester, England	8
Brockway, Stearns, Minnesota	1
Buckman, Morrison, Minnesota	6
California	7

Select an item in that list and press **"OK"** to make that person the selected individual in the view you are using.

Find by To Do Task



Brown, Asa Clark 10:47

Task Repository Reference

Category Marriage

Task Search Charlton, MA marriage records

Status Open

Priority Low

Open 8 Dec 2001 Research

Reminder Correspondence

Ref # Other

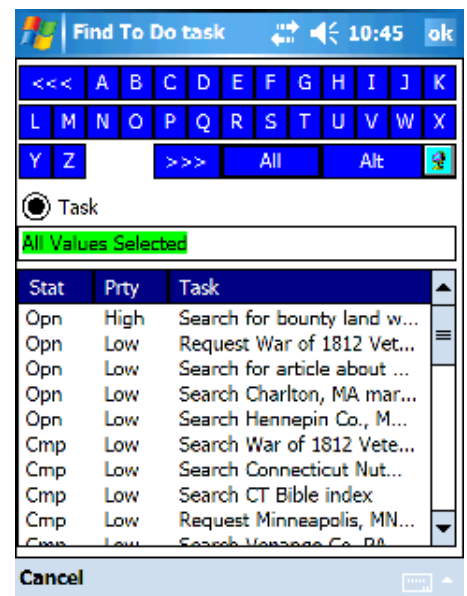
Location Charlton, Worcester, Massachusetts

Description Result

Vital and town records of Charlton, Massachusetts, 1714-1859; FHL Film

You can search for To Do's in your database by the value assigned to the task. You can do the search from the **"Tools", "Find", "To Do", "by Task"** menu item. The "Find" display allows you to pick the first letter of the task which will display a list of matches. The example to the right shows the result of pressing **"All"**. Select an item in the list and the task information will be displayed.

Tip: Pressing **"All"** provides an easy way to see all To Do's in your database.



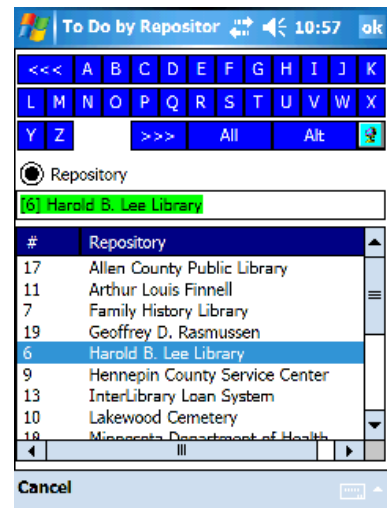
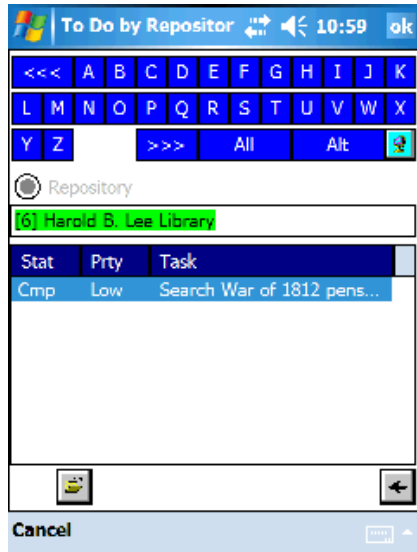
Find To Do task 10:45

Stat Prry Task

Opn	High	Search for bounty land w...
Opn	Low	Request War of 1812 Vet...
Opn	Low	Search for article about ...
Opn	Low	Search Charlton, MA mar...
Opn	Low	Search Hennepin Co., M...
Cmp	Low	Search War of 1812 Vete...
Cmp	Low	Search Connecticut Nut...
Cmp	Low	Search CT Bible index
Cmp	Low	Request Minneapolis, MN...
Cmp	Low	Search Marriage Co. R...

Find by To Do Repository

If your desktop genealogy program supports attaching a Repository to a To Do, you can search for To Do's associated with that Repository from the "Tools", "Find", "To Do", "by Repository" menu item. The "Find" display allows you to pick the first letter of the Repository name, which will display a list of matches. The example to the right shows the result of pressing "All". Select an item in the list and the To Do's, if any, will be displayed.



Selecting an item in the list allows you to then press the "Open" button to display information about that To Do.

Note: For desktop genealogy programs that allow you to attach a To Do to a Repository (instead of a Repository to a To Do), use the Master List for Repositories to find those To Do's.

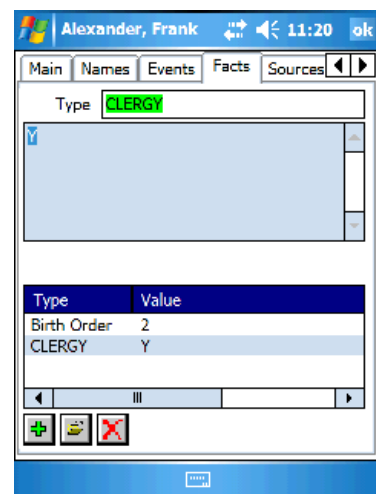
Displaying all To Do's

You can display all the To Do's in the database either from the Master List or by doing a "Tools", "Find", "by To Do Task" and selecting "All" from the find screen.

The Master Genealogist Flags



The flags in The Master Genealogist can be found under the "Facts" screen for the Individual. Since TMG does not support the flag data in GEDCOM files, you cannot edit this information on the device.

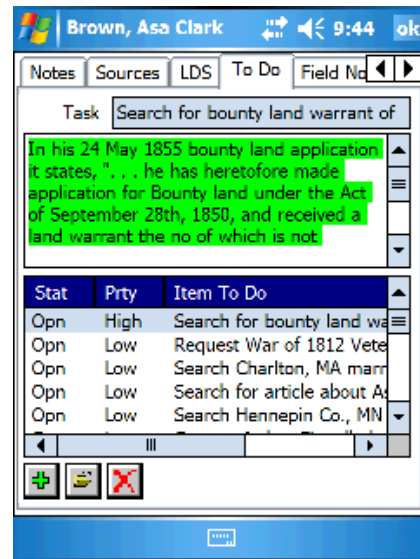
Note: Other desktop genealogy programs support similar features. If those programs support GEDCOM processing of that data, you will be able to add/edit the information on the "Facts" screen. If it's a Y/N flag, adding the flag to the list assumes "Y", and deleting the flag from the list assumes "N".



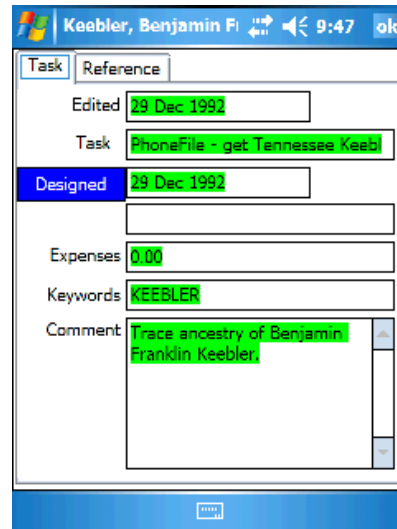
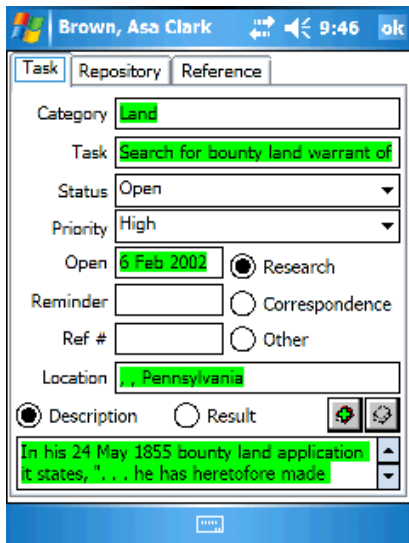
Add a To Do

A To Do can be attached to Individuals, Families, Events, Sources, etc., depending on the capabilities of your desktop program. The To Do tab may appear for Individuals and Families if supported by your desktop program. You may also see a To Do button on screens such as the Event tab.

	Invoke the To Do screen for the selected item – There are no To Do's currently defined for this item.
	Invoke the To Do screen for the selected item – To Do's already exist.



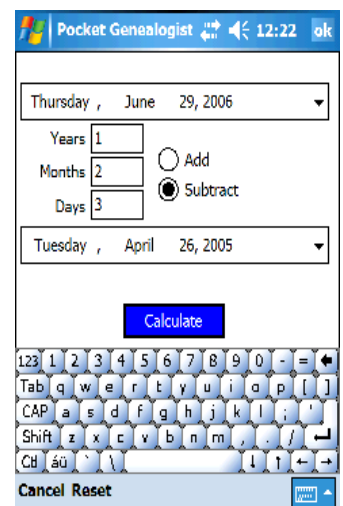
To Do's already defined for the item will be in the list and selecting that To Do will allow you to view/edit or delete it. Pressing the Add button allows you to create a new To Do. The type of data fields shown on the To Do edit screens will greatly differ depending on your desktop program. For those imports that allow a single To Do to be attached to multiple items, such as The Master Genealogist, the "Reference" tab will give you those details.

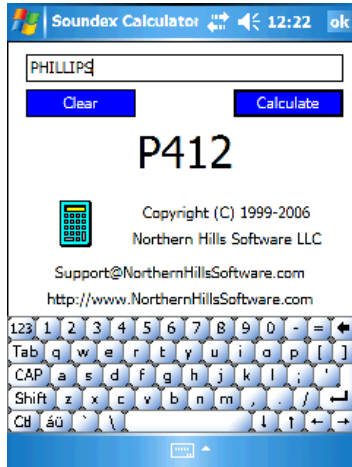


Date Calculator

The date calculator is used to calculate a second date based on a first date and the number of years, months, and days between the two. The date calculator is found from the **“Tools”, “Calculators”** menu.

Note: You cannot calculate the number of years, months and days between two dates. You always only supply one date and calculate the second.





Soundex Calculator

The Soundex calculator is used to calculate the Soundex code for a name. The calculator is found under “**Tools**”, “**Calculators**”.

Type in the surname and press the calculate button to display the soundex value. For certain names, you may get two values as the result. (Due to a little known “rule” dealing with H’s and W’s.)

Coordinates Calculator

The coordinates calculator allows you to enter a latitude and longitude value and then convert it to a different format. (So it’s really a converter, not a calculator.) You can find it from the “**Calculator**” menu found under “**Tools**”. The Coordinates button will retrieve the current GPS setting.

Note: GPS only works with Windows Mobile 5 and a GPS device that works with the Windows Intermediary driver.

Using the Relationship Calculator

The relationship calculator is used to determine the relationship between two individuals. The relationship(s) shown in the list is always in reference to how the first person relates to the second person. As you change person 1 or person 2 the relationships shown in the list will automatically calculate.



Invokes a “Find” screen to select the individual by name.



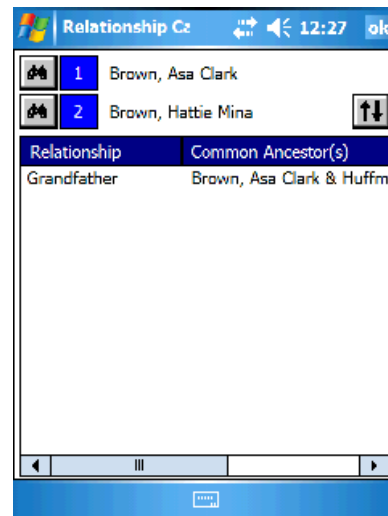
Invokes a “Go To” screen for selecting person 1.




Invokes a “Go To” screen for selecting person 2.



Used to swap person 1 and person 2.



History List

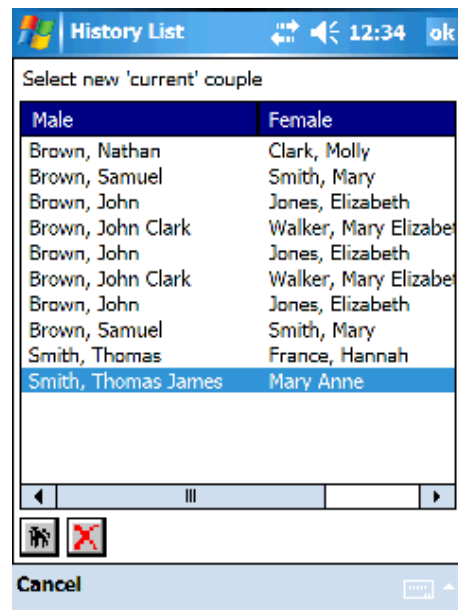
 Pocket Genealogist keeps track of the individuals viewed during a Pocket Genealogist session. (Information is not retained when you close the database or exit the program.) You can use the History buttons on the menu bar or use the menu items “Back”, “List”, or “Forward” to traverse the history list. When you select the “List” function, you will see the individuals in the order that they were selected. The list is a “circular” list that displays a maximum of 100 individuals/family sets. The last viewed set is highlighted when the list is first displayed.



Displays the immediate relations to the person selected in the list.



Deletes the item in the list but does **NOT** delete the individual.

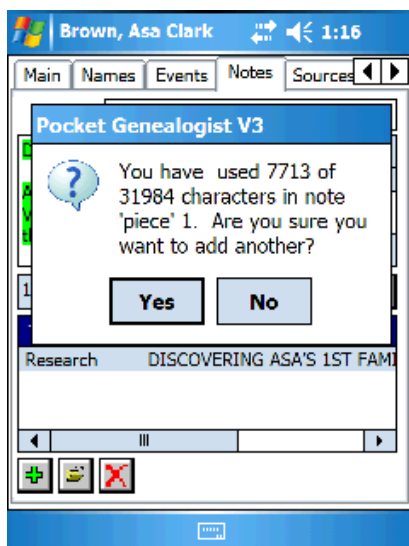
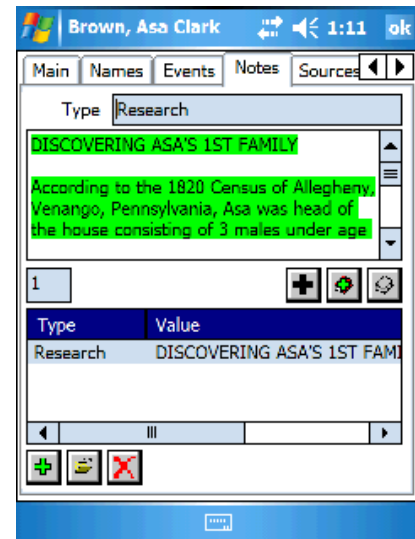


Working with Notes

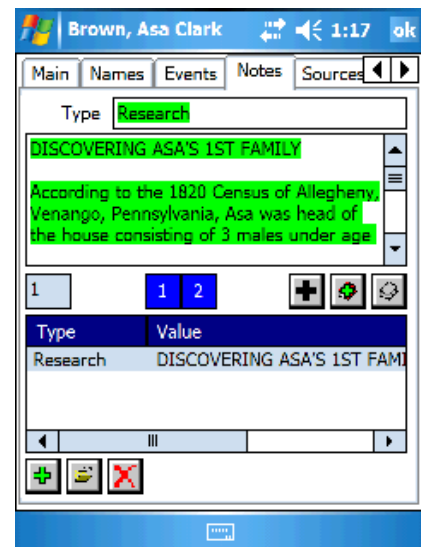
Because of database limitations and speed issues with the display of very large notes, Pocket Genealogist has to break notes up into roughly 30,000 character “chunks”. You can still access your complete note, but perhaps not as conveniently as we would like.

The Note display screen shows all the notes for the item you are viewing, as in the example at the right for an individual. Part of the note is shown in the top window for the note that is selected in the list. Roughly 500 characters will be shown in this display. If not all the note is shown a “<More>” will be displayed at the bottom of the note.

Tab on the note field to display a screen showing all 30,000 characters of that “chunk”. Between the note display and the list are some other fields and buttons that help you manage the note. The field on the left shows which “chunk” you are currently viewing.

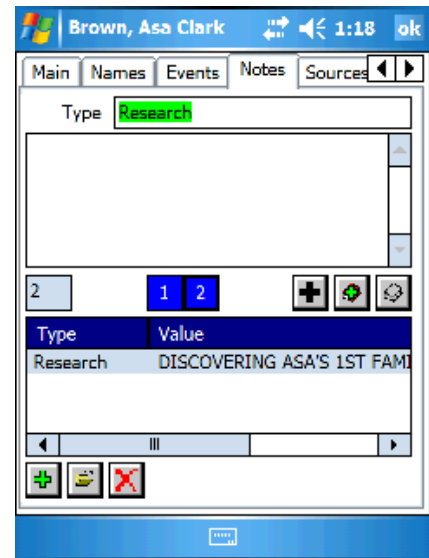
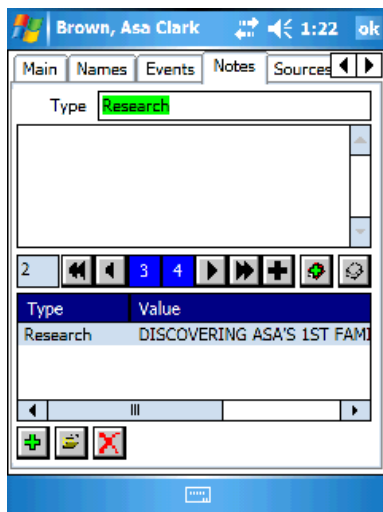


If more than one chunk exists for that note, additional fields will be shown that allows you to pick which chunk to view in the window. You can use the black “+” button to add a new “chunk” area to the note. When you do this, it will give you a prompt indicating how much space is currently used in the last “chunk” defined for the note.








If more than one chunk is defined for the note, you will notice that additional buttons are displayed. Pressing the “1” button shows the original first “chunk”, and pressing the “2” button shows the second “chunk”. The example to the right shows what you will see when you view “chunk” 2. Notice that the field to the left now indicates that you are looking at “chunk” 2. Tapping on the note area will display a view/edit screen for working with that “chunk”.

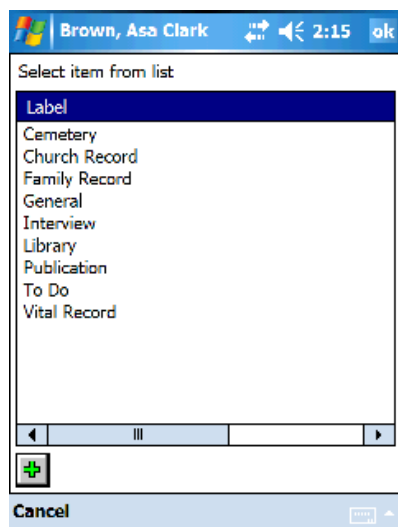
You can add as many “chunks” as you want with about 30,000 characters of note text in each “chunk”



When you have more than two chunks, in the next example we have defined five, you will get some additional icons in the center section to work with the note. These icons are used to move forward and backward through the chunks.

-  Used to position the two chunk buttons (3 and 4 in this example) back to the beginning of the list. 1 and 2 would be displayed after pressing this button.
-  Used to position the two chunk buttons two positions backward. After pressing this, 1 and 2 would be displayed.
-  Used to position the two chunk buttons forward two positions. 5 would be displayed after pressing this button.
-  Used to position the two chunk buttons to the end of the “chunk” list. 5 would be displayed after pressing this button.
-  Used to add a new “chunk” to the list.

Field Notes

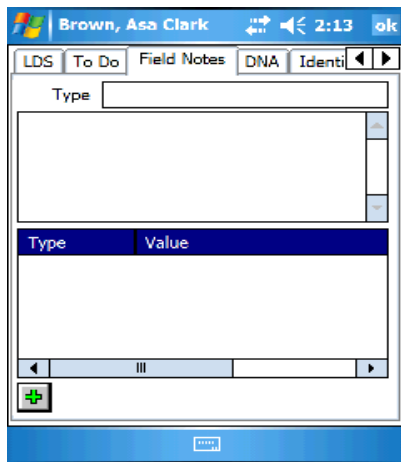


Overview

Field notes do not transfer via GEDCOM file. You must either print a copy of the notes or “cut and paste” to your desktop genealogy program. Field Notes are the only data entry that can occur with the “Trial” version of Pocket Genealogist.

Adding note on Device

The Field Notes display on the device is almost identical to Notes, but you are limited to roughly 30,000 characters per note which simplifies the note processing on the device.



To add a new note, press the “Add” button. A list of field note types will be displayed and you can either select one from the list and press “OK” or press the “Add” button to add a new Field Note type. Once you’ve selected the field Note type, the edit screen will be displayed for entering the note.

Field Notes list (Reports)



First you must retrieve the notes from your device using the “Synchronize” function in Pocket Genealogist. Select the database you wish to synchronize and press the “Synchronize” button. After the synchronization is complete, your Field Notes will now be in the corresponding desktop Pocket Genealogist database.



Now press the “Reports” button and select “Field Notes” from the prompt. The Field Notes screen will automatically select all notes that are new or changed since the last time you did a synchronize.

Field Notes

Double Click on an item in the list to display the details for that Field Note

Cat.	Date	Type	(M)RIN	UserRef	Note
0	07/28/2003 *	To Do			Tell all my genealogy friends
1	07/28/2003 *	Cemetery	1		Abraham is definitely in the
1	07/28/2003 *	General	1		This is a sample field note
1	07/28/2003 *	Library	1		Go to the JV Brown library
1	07/28/2003 *	Publication	1		Look through Now and Then
2	07/28/2003 *	To Do	1		Find marriage license for

Category and ID

☒ 0 - General

☒ 1 - Individual

☒ 2 - Marriage

☒ Modified Notes Only *

Date Range

From: 7/28/2003

To: 7/28/2003

Buttons: Refresh List, Print, Exit

You can also customize your selection criteria. You must select at least one note category. (If you select ONLY individual or marriage, you can also specify a Record Identification Number (RIN) or Marriage Record Identification Number (MRIN) or User Reference.) You can also specify a date range for the notes. If you only want notes that have been added or changed, select the “Modified Notes

Only” check box. After you pick the options that you want, press the “Refresh List” button. If the results are not what you want, change your options and press “Refresh List” again.

The asterisk next to the date in the list indicates that the note has been modified. You can view any of the notes by double clicking the item in the list that interests you. After you view a note, you may want to turn off the “modified flag” so that the note will no longer be considered “modified” the next time you query the list.

If you press the “Print” button, all notes shown in the list will be selected for printing.

Field Note Display

The screenshot shows a window titled "Field Notes" with a blue title bar and a red close button. Inside the window, there are several input fields and buttons. The "Category" field is set to "Individual", the "(M)RIN" field is set to "1", and the "Date" field is set to "07/28/2003 09:01:32 PM *". The "Type" field is set to "Library", and the "UserRef" field is empty. The "Individual(s)" field is set to "Rev Abraham Smith III". Below these fields is a large text area containing the note: "Go to the JV Brown library to gather information on Abraham." At the bottom of the window, there are five buttons: "Select All", "Copy to Clipboard", "Turn off modified *", "Print", and "Exit".

When you “double click” on one of the items in the Field Notes list, you will be shown more detail about that note. You can “copy” the note from the window to “paste” into your genealogy program. You can use your mouse to select any or all of the note or use the “Select All” button to select the entire note. Then press the “Copy to Clipboard” so you can then “paste” it into your desktop genealogy program (or any text editor).

If this note has been modified since the last time you synchronized notes, the “Turn off modified” button will be enabled. If you press that button the note will not show up in the list the next time you do a query for modified notes.

If you press the “Print” button only this one note will be selected for printing.

Field Note Print

Field Note Print

Information

Name: Samsung SCX-4100 Series

Location:

Comment:

Copies:

Orientation:

Double Sided: ☐ Yes ☐ No

Select

☐ CSV File

Output Options

Sort 1:

Sort 2:

Sort 3:

Sort 4:

Sort 5:

☐ One note per page

Print Progress

(M)RIN: UserRef:

Date:

Category:

Type:

Individual[s]:

Note:

Note: 0 of 2 Page:

☒ Turn off Modified * flag for all printed notes

OK Cancel

The Print dialog allows you to either print the field notes to a printer, or to export the notes to a CSV file. (CSV files are text files generally used with a spreadsheet program)

The “Select” button is used to either select the printer for output, or to select the name of the CSV file if you have “CSV File” checked. By default, the CSV file will be given a name and location although you can override to any value you wish. If you use the default location that is provided, the CSV files will show up on the “Logs” screen using the “Logs” button found on the main Pocket Genealogist screen.

The output options section allows you to pick the order in which the Field Notes will be printed or exported to CSV. If you have selected only one Field Note, the sort boxes will be disabled. If you do not pick any sort options, the Field Notes will be printed in the order that they are shown in the list prior to selecting the “Print” button. If you want only one Field Note per output page, select the “One note per page” check box. Otherwise, more than one Field Note may be printed on a single page.

Some options aren’t applicable when exporting to a CSV file, and they will be disabled or hidden when that option is selected.

When you press the OK button, the Field Notes will be printed. As each note is sent to the printer or CSV file, details for that note will be displayed in the Print Progress section.

Research Lists

Overview

Research Lists are a way to group Individuals, Families, Sources and Repositories into lists of your choosing. You can create as many research lists as you like and assign any of the above items to the list for further research while you are “in the field” using Pocket Genealogist.

Other than Family Historian, Research Lists do not transfer via GEDCOM or direct import. There is a simple export to CSV file feature for the Research Lists in Pocket Genealogist on the desktop so you can access the information you create on the device.

Pocket Genealogist Presentation

Adding an item to a Research List

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The “Add item to Research List” icon will be found on the screens applicable to items that can be added to a Research List.

Pressing this button does not show you other Research List items that have already been added, it is only used to add a new item to a list.

By default there are no Research Lists created on the device when you import a new database. One of the first things you’ll need to do when you add an item to a Research List is to create one or more lists.

The screenshot shows the 'Brown, Asa Clark' form with tabs for Main, Names, Events, Notes, and Sources. The 'Main' tab is active, showing fields for Given (Asa Clark), Surname (Brown), Sex (Male), Anc Int (0-Very Low), Des Int (0-Very Low), Living (Yes/No), and Private (checkbox). The 'Add item to Research List' icon is circled in red.

The screenshot shows the 'Research List' screen with a table with columns 'Research List', 'Count', and 'Note'. The table is empty. Below the table is a large text area for notes. The 'Add' button is visible at the bottom left.

Here is an example of what you might see the first time you try and add an individual to a Research List. The top part of the display shows the defined Research Lists and at this point none are defined. Press the “Add” button to create a Research List.

We will create a Research List called “Work in Progress” which we will use to group items that we are currently working on. Press “OK” to add the list.

Make sure the “Work in Progress” list is selected and enter a note, if desired, for this item we are adding to the list. Note that the “Work in Progress” research list shows 0 items attached to it. (It is a new list and we are still working on adding the first entry.) Press the “OK” button to add this item to the list.

The next item we add an item to the list, we can either create yet another list, or add it to one we have defined. When adding an item, make sure you have the write list selected before pressing “OK”.




The screenshot shows the 'Research List' screen with a table with columns 'Research List', 'Count', and 'Note'. The table has one row: 'Work in Progress' with a count of 0. Below the table is a large text area for notes. The 'Add' button is visible at the bottom left.

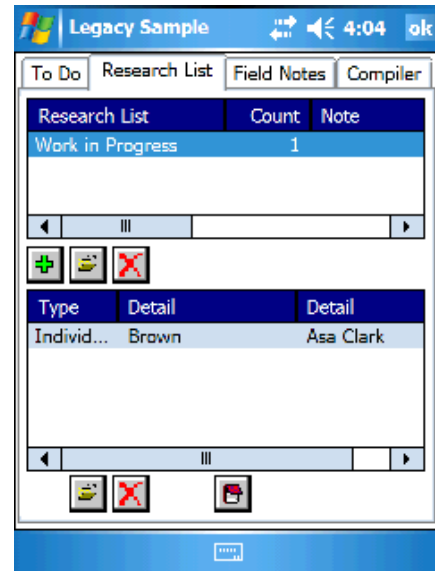
You can also add a note to the Research List itself. Use the “Open” icon for the selected list to add a note for that entire list.

Viewing Research List

All Research Lists and the items attached to them can be found on the “Edit”, “General Details” screen. You can work both with the lists, or with the items in the lists on this screen.




Working with a List

-  Used to add new Research Lists
-  Used to edit a Research List (edit the note assigned to a list)
-  Used to delete a Research List and all items contained in the list. This does not delete the actual item attached to the list. For example, it won't delete an individual attached to the list, just the Research List record.



Working with items in a List

Select the Research List in the top list, then select the item in the list on the bottom that you wish to work with.

-  Used to view/edit the items attached to the Research List.
-  Used to delete a Research List item. This does not delete the actual item attached to the list. For example, it won't delete an individual attached to the list, just the Research List record.
-  Used to view/edit the note for the item attached to the Research List.

Pressing the “Edit” button for an item in the list will display the attached item. In the above example pressing this button would display the Individual screens for the selected person.

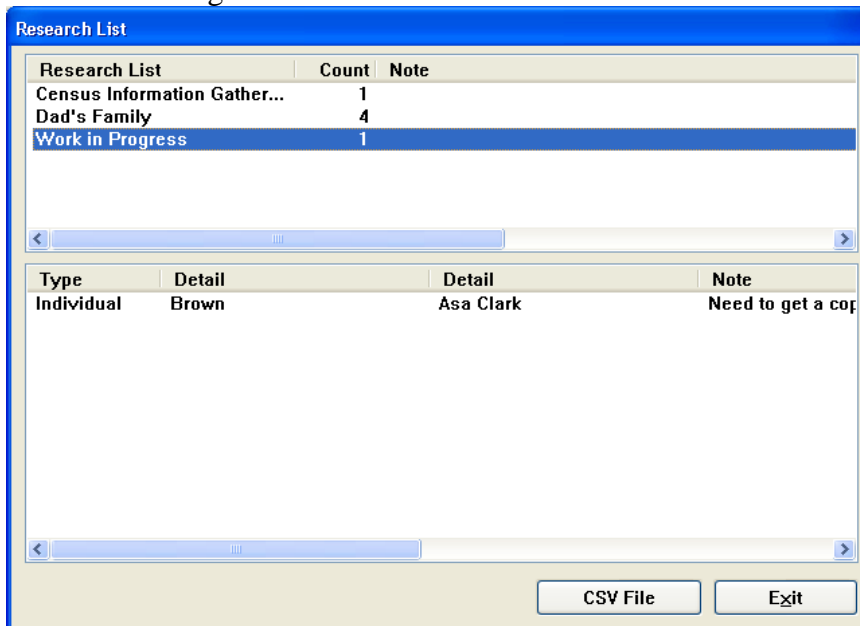
Research List Report



First you must retrieve the Research Lists from your device using the “Synchronize” function in Pocket Genealogist. Select the database you wish to synchronize and press the “Synchronize” button. After the synchronization is complete, your Research Lists will now be in the corresponding desktop Pocket Genealogist database.



Now press the “Reports” button and select “Research List” from the prompt. The Research List screen will show a display similar to what is on the device.



Select an item from the top list will show the details of the items attached to that list. Pressing the "CSV File" will create a CSV file **just** for that Research List. Repeat that process to create a CSV File for the other lists.

By default, the CSV file will be given a name and location although you can override to any value you wish. If you use the default location that is provided, the CSV files will show up on the "Logs" screen using the "Logs" button found on the main Pocket Genealogist screen.

Sources: (Taken almost verbatim)

Eastman's Online Genealogy Newsletter, Vol. 11 No. 30- July 24, 2006

Pocket Genealogist Version 3.0

<http://www.northernhillssoftware.com/EN/News/reviews.htm>

Pocket Genealogist Version 3.02 User Guide

<http://www.northernhillssoftware.com/documents.htm>