

## PAF (Personal Ancestral File)

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This is divided into four sections: The first section consists of 8 pages of detailed usage of PAF and its advanced features. I put the advanced section first since most may already have some understanding of PAF. The second section consists of 4 pages of a more simplified usage of PAF for beginners. The third section at the end lists 14 activities to clean up a database. The fourth section lists 11 quick searches when examining a new line.

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Section I: Advanced usage of PAF. It is difficult to summarize a 200 page user's manual in 8 pages... but here goes:

**PAF** is a free computer program that allows you to create a computerized family tree. It allows you to organize, share and submit family records using a computer. It's available at Familysearch.org. Click on "download PAF" and follow the instructions. It takes a minute or so with Comcast. It will put an icon on your desktop; if you double click on it, you will open PAF.

You can also download free lessons on PAF from Familysearch.org; you need Acrobat Reader (most already have it on their computer), There are also PAF lessons at Ohanasoftware.com, click on lessons, half way down is Beginning PAF & a third set of lessons is near the bottom at BYU Religion course 261 which also has PAF lessons. To practice, save your file as "file, save as" and name it "practice1", then manipulate, move, delete, merge, etc and see if it does what you wanted it to do... practice.

You can use PAF to: \* Enter and organize info on individual and families. \* Display pedigrees and families. \* Submit names for temple work and for additions to Pedigree Resource. \* Easily find names and families (even when thousands are in the database). \* Print: Pedigree charts, family group records, names with incomplete ordinances, end of list names. \* Store info on back-up disks; exchange info with others. \* Attach scanned photographs, certificates, and histories of the individuals

**Three additions** to PAF (all cost money) can be added and will show up in the tools pull down menu of your PAF program: PAF Companion, PAF Pal and PAF Insight

**PAF Companion** - You can download an evaluation copy from (Familysearch.org, free downloads) or you can purchase a permanent copy (about \$7, download the version, then a screen will give you a phone number to call to make payment and get a pin number and Unlock Key number to access it). PAF companion is a printing program. No new data is entered with it, it simply accesses an existing PAF program. You can print Family views: (Family Group Sheet, Standard Group Sheet, Kinship, Hourglass); Ancestry: (Pedigree, Box, Fan, Ahnentafel (Book), Bow Tie; Descendancy: (Box, Outline, Register (Book). The charts have color variations to highlight certain lines.

**PAF Pal** is a software program available from Ohanasoftware.com which costs \$18 for the downloadable program. I ordered the program on line, received an email for a username and license key #, downloaded it immediately from the Internet and started using it, all within 10 minutes. It has 6 functions: Replace, Clear/Change (Clear: Ancestral File Numbers; All LDS fields, Submitted; Change: Globally expand or abbreviate US (& England) State places, Add or delete USA) \*\* Note: I have used these global changes more than 100 times with my database,

Reports (Individuals by date changed, Demographics), Options (Bullet for married children without children; picture of spouse and parents on family view), Songs, Temple Ready (create report of Updated records).

**PAFInsight** is a software program available from [Ohanasoftware.com](http://Ohanasoftware.com) which costs \$25 for the downloadable version. The program is absolutely invaluable in searching the IGI for current temple info and transferring the data to your hard drive. The program covers Searching IGI, Compare and Sync 2 databases, Merge duplicate records (much better than PAF's match/merge), Editing RINs (which finds clumps of people not connected to your main database) and compacting your database, and Edit places (by typing or dragging and dropping).

The IGI (Temple ordinance data) at a Family History Center has info on their hard drives only up to the year 2000. If you as an individual sign in at [Familysearch.org](http://Familysearch.org), (name and password created from registration with member number, and confirmation date), you can search each individual you type in and will get ordinance info as current as a few days, however you must then enter the info into your own PAF program. PAFInsight has a much better way to accomplish this.

I have used PAFInsight for thousands of searches and have saved hundreds of hours. PAFInsight opens up your database in the IGI and as you highlight a particular person and click on "search" it searches the IGI and allows you to download the info directly into your PAF program. You put your IGI name and password (that you got from [Familysearch.org](http://Familysearch.org) by registering) in PAF Insight by tools, options, family search, enter info. Caution: you must "save" the file before exiting the program or the updated info will be lost; although the new version allows you to save as you are working on the program. The search will come up with a number of "hits" and the % chance it is "your" person, and you click on that hit (top half of your screen) and view it in 3 scenarios (individual, spouse, family) in the bottom left for your data and the bottom right for the IGI, and then you click the boxes on the IGI (on the right) that you want downloaded and click on "update" and you will see the info transfer. You can copy and paste data (from right to left) or simply type things into the left (your database). You can "search" up to 250 at a time (it searches one at a time and holds the others in a "waiting cue" to start the search immediately. You can examine any hit as a search is continuing (and update). I start a search, have dinner and go to a movie, then return to find the 250 already searched so my time is spent transferring data rather than waiting for a computer search. This is the only program that does your genealogy at night when you are sleeping...

The merge section of PAFInsight is much superior to the PAF match/merge. It uses % likelihood of a match and has many more hits than PAF (although PAF allows you to change the match/merge criteria). The Repair function is better than PAF (file, check/repair) and gives more details of problems (this function is invisible unless you have problems, then it will give you the option to use it). The repair function automatically eliminates unused spaces which reduces the size of the file (you can't see it happen, no affect on your data).

**Saving files...Whatever you file name is, put a date by it and continually "save as"** with a more recent date so you have prior versions in case you mess up the database or lose it or it becomes corrupted. Save each of those later versions on a CD or floppy away from your computer. I post my entire database on [RootsWeb](http://RootsWeb) ( it protects the privacy of those born after 1930 without a death date - but is completely retrievable by you if you lost your database). I also attach my database (zip file) to an email and sent it to one of my kids and have them "restore" it to their PAF so it is safely stored somewhere outside of my home and away from my computer.

**Movement of file:** I use thumbdrives (\$20 for 256 size = 175 floppies) or email to move data around. Sometimes I send an email from my yahoo mailbox to Comcast and attach the zip file to the message. When I get to my workplace, I open up yahoo mail, go to mail sent, click on the attachment and download it and restore to my PAF at the workplace (or a friends, or a family history center). When I get done at the workplace, I "save as" to a later date, send another yahoo letter and attach the latest zip file, and upon arrival home, I open up yahoo mail, mail sent, click

on the download, download it, open PAF, click on restore and go to the downloaded zip file and viola... the updated info.

**Types of files:** .PAF, .zip, .ged, .sub, .oup, etc...

**GEDCOM:** Every genealogy program has their unique code and suffix... (PAF, Family Treemaker, Ancestry, Legacy, RootsWeb, Familysearch, etc) and their data is almost never interchangeable with a competing genealogy program. In order to transmit data between programs, all have agreed to export and import data in the same format (.ged, called a GEDCOM file). A GEDCOM file can be imported into any existing genealogy program and then must be linked (merged) to a piece of data in the file to create a combined pedigree.

**PAF files:** a .PAF file is the genealogical data in a file in the Personal Ancestral File program. It is saved as a .PAF (to the hard drive or to a disk) and can be opened up in any PAF program and will open up as a separate, unique .PAF file. To bring new data into your file, you can manually type it into the computer or you can import a GEDCOM file and match/merge to combine the existing and the new data. When you back-up a .PAF file, it is crushed down into a zip file to save storage space. (my zip file is 6 times smaller than my PAF file... exactly the same info). When you want to view the zip file, you have to unzip it (balloon it out) which is what is done by file, restore.

**Temple Ready files:** .ged; .sub; .tbk and .oup files: When you export a file to temple ready (from PAF), it creates a gedcom file that the Temple Ready program at the Family History Center (FHC) can read. You could use any gedcom file at the FHC but the one from PAF excludes people who wouldn't qualify (no birth place or date) and puts dontdoit on ordinance dates for individual who don't need the work (like parents who do not have enough info for their own work but are in the database to have their children sealed to them). The file can be transferred on a floppy, a thumb drive, a CD or emailed and downloaded into the FHC database. The Temple Ready program at the FHC generates a new file for your floppy called an SUB (submission) file that the computer in the temple can read and print the cards from. You can also back up that SUB file with a TBK file in case the temple computer can't read the SUB file. You can also create an update file for your PAF program of names approved through Temple Ready at the FHC, so you do not have to type "cleared" by each name in your original PAF program. This is important so you do not "accidentally" resubmit the same names again. The file is an update file (.oup) (you need to click the box for "update file" about 2/3rd of the way through the Temple Ready program). This file has the ordinance dates garnered in the Temple Ready process as well as those approved for submission. You add this file to your PAF program under file, add temple ready update.

Here are most of the many things you can do in PAF:

1. Welcome screen, select new and give it a name; save; click general file, click prepared by (fill in), click OK. This will create a new file on your hard (C) drive.

**Note:** If you are working on someone else's computer, save and back-up the info onto a disk, then you can delete the info from the "borrowed computer's" C drive (go to my documents, right click on the file name, and go to "delete"). When you go back to the home computer, you can "restore" (unzip) the info, and use the new file or create a GEDCOM and import it into your own program on your C drive. Open PAF (there are 3 views: pedigree, group sheet or individual). *3 ways to add, delete, etc.:* the words on top, the icon on top, or double-click or right click on your mouse.

2. Some odd commands and ideas: For non-English characters, click F7. Type M/F/U for male/female/unknown and press Tab or Enter. Dates are day, mo (3 letters), yr (4 numbers). Do not enter LDS blessing dates as christening; click options, new, blessing, select. Place (all written out): city, county, state, and country (I don't use USA). Baptism date followed by Temple

OR if living, place. Click inside "temple" box for names. Sealing to parents: if the individual was born after the parents were sealed, enter BIC (born in the covenant) - no sealing to parents ordinance necessary.

3. RIN: PAF assigned a Record Information Number for every individual, sequentially as they are entered into the computer. It is not important to manage which numbers go to which name; although PAFInsight will allow you to reassign RIN numbers.

4. If you ever need to edit (change, add, delete), double-click on the individual's name. This edit screen also has a source place for notes, once entered, click on "save". Once you have entered sources or notes, a small triangle (like a page folded down) appears in the top right of the person's name field. You can change the order of children, at Family View Screen, click on "edit", then "order children", highlight the name and move with the mouse; then click OK; and create a back-up before you exit PAF. In the pedigree view, you can always right click on a name and left click on "Move to Primary" to see the extended pedigree off the right.

5. When you're done for the day, it is advisable to create a back-up disk. From Family or Pedigree, click on file, back up, back it up on your hard drive or insert disk (specify back up is drive A), Yes, OK, label them & date. You can copy your zip file to a CD if your computer has CD copy capabilities. At your home computer, open the back-up file. If at a new location (Family History Center) you must "restore" (unzip) from the file menu since the stored data was compressed in its zipped form.

6. You can add names from either the Pedigree or the Family views. From the family view screen, you can add by using the add tab on the first line of the screen, or clicking on the individual picture on the second line, or right clicking on an individual, or clicking in an open area (below children's names, blank father or mother). You can always right click on someone and "move to primary". You can move around the Family Group screen by typing S (for Spouse) and the person on the bottom will move to the primary position; or you can type "F" (father) or "M" (mother) and they would move to primary.

7. Printing pedigree charts, click on "file", "print reports", indicate # of generations (4), preview (to see it), include index of names (if wanted), then OK. It will print a single page, a blank form, or a "cascading" of 2 pages or more. Printing Group sheets: highlight father or mother, click "file", "print report", "family group", "single family", "expanded", "print", "OK".

8. Linking your imported information: At pedigree view (with you as primary), click on one end-of-line individual (for who you created a GEDCOM file), click on "add" (menu bar), "father or mother", "select existing", "individual list" (bottom left), "alphabetical", begin typing the name & when highlighted, click OK; then add spouse ... the computer will link the new GEDCOM with your PAF names. Do this for each GEDCOM file on the diskette.

9. Match/Merge. Identified records that may be duplicates and combines/merges them into one single record: Open PAF, click on "tools", "merge", NO backup, YES to all and it will merge duplicate AFN (Ancestral File Numbers). When it is done, click OK. Back-up before exiting. You may also find other duplicates by manually merging - "tools", "merge", NO, "options", click inside all boxes & 10 years between birth dates, OK. For each potential match, examine "individual" tab and "marriage" tab. Left record is primary, right will be merged only into blank spaces on left record, and balance of right info will be lost. The left and right can be "switched" if more info in on the right. Selected right fields can be checked to be preserved or you can 'edit' the left (primary) record as desired. When ready, click "merge" and "yes"; then next match. PAFInsight has a much better match/merge program (uses % chance of sameness and allows selected dates, places and names to be merged).

10. Helpful reports & lists: File, Print Reports, then Pedigree, Group Sheets, Ancestry, Descendants (Each report can be altered to include dates or not, places or not, temple info or not;

all according to which boxes you check). Preview the file, then either print (top right or print to a file (box right hand corner) if you want to attach it to an email. In the Print reports section there is a preferences box which allows you to show LDS data or exclude it on the report. You can also audit your names by printing an alphabetical list of all names or viewing from your computer: From family/pedigree, click "file", "print reports", "individuals sorted alphabetically", "print". Or from family/pedigree, click "search", "individual list", "alphabetical".

The Scrapbook section allows you to make a separate CD with genealogical info, notes and pictures all on the CD. In all other cases, the photos you have are on your hard drive and are not attached to any GEDCOM or PAF files you create even though you may have a reference to them in the multimedia section of each individual.

Lists tab is extraordinarily helpful: Unlinked individuals, duplicates (you can vary the search mechanisms, click on options, click on advanced), possible problems (kids out of order, child born before the marriage date, both spouses with the same surname, time gaps too long, etc.), places sorted alphabetically (to see inconsistencies), incomplete ordinances, etc. Always preview the list before printing (it can be too many pages long).

11. You can print a list of missing ordinances: "file", "print reports", "lists", "LDS incomplete individual (then marriage/sealing)", "print" (note # of pages if too huge, do some now and some later). You can then manually check the printout against the IGI&Addendum at the FHC and manually correct your PAF File at home. OR you can submit all for TempleReady and those identified as "completed" will create an updated file at the FHC that you can restore to your PAF with the new dates included.

12. Multimedia (double click on the individual, click on photo) will allow you to access photos on your hard drive by typing in the name where the photo is located. It is used in creating a scrapbook (file, print reports, scrapbook); however with exporting, the photo file name is uploaded but the actual photo is left on the hard drive. Photos in .jpg are much smaller in size than .bit (may lose a small amount of resolution but the size is considerably smaller), therefore .jpg's are the most common way to store letters, photos, certificates, etc. I save them in a single file on my hard drive (genealogy photos) so I can drag & copy the file to my disk copier and it copies all of the photos or certificates with one command..... and store them away from my computer. I name my photos, certificates and memorabilia the same way...Jones, John (b 1897) dea cert 1942.jpg ... or Jones, John (b 1897) FamPhoto1926.jpg... or Jones, John (b 1897) & Han Pug- 1909 MarrCert.jpg. Note that all files clearly and uniquely identify who the item is about and what the item is, and that info is included in the actual file name.

13. Advanced search (Control F) and click on advanced, click on define, put in your criteria and do the search. Often I save the search parameters and use them over and over. For example, if I want all records that don't have a birth or marriage date (so I could approximate a date), I would search for: (Birth date - does not exist) AND Christening date - does not exist) OR Marriage date - does not exist ..... then save it as no date. You could find all the "Atlantic's or "Pacific's in your database, or all Livingstons born after 1910, etc. To retrieve a saved search criteria, Control F, click on advanced, click on define, click on retrieve and highlight which one you want.

14. Changing the default template: tools, preference, template, add, give it a name, then move things from the left to the right and once they are on the right, drag to get the order you want. I have: name, also known as, sex, RIN, bir & place, chr & place, dea and place, bur & place, title (prefix), occupation (description), and temple info. Save, click on it, make active and it is on your hard drive (it does not travel with a computer file). I use the AKA for the many variations on census and other records; I use the prefix-title for Capt., Prof, Dr., etc.; I use the occupation mainly from the census'. Most other things (like immigration, cause of death, residences, military, education, etc.), I put in the notes section of the individual.

15. Changing names to mixed case (tools, change names to mixed case) - this will make all caps

look like the normal first letter capitalized and the rest lower case. It works with both names and places. Maybe you import a file where the person capitalized everyone... this way you can change it in a single stroke. You can still view the surname capitalized both on the screen and on reports by tools, preferences, names, click on box that says "capitalize surnames on screens and reports".

16. If you want the same person to come up every time the program is opened, go to tools, preferences, file, and put the RIN in the box and click on use; This is the same place where you can put relationships on the screen... a very interesting feature. Pick your base person, get their RIN number (Control F, sort "alpha", type last, first, get RIN, close), then at tools, preferences, file, change, click on box to show, click on search and enter RIN, OK, OK.

17. For global changes - click on an individual who has something to be changed globally, like a place. Click on the place (it will all darken), put your arrow over it and right click and copy, go to tools, global change, search in (make sure places), put your arrow over the "search for" and right click and paste, do the same in the "replace with" and change it to the corrected material, click on case sensitive, click on create report, then click on replace. You will see a report listing each thing that was changed from and to...if anyone of them were changed in error, you can global change back or you can go to the RIN of that particular one and manually change it back. There is no undo function in global change, so be careful. If you have any doubt that your change can be misinterpreted, back up your file first so you can restore it if you mess it up.

18. Exporting: If you want to export a certain ancestral line and their descendants, go to file, export, partial (you could also unselect LDS data on this screen), select Ancestors (identify the most recent link) and fill 15 generations for descendants...that will bring the chart all the way forward to the present. Click OK, you will see the # selected, You can click on show results if you want to preview it, then click OK, export, give it a name and a GEDCOM file will be created. You can then email the person and attach the file as an attachment. If it were too big, you could open a new PAF file, import the data, back it up (in a zip file) and send the zip file which would be much smaller. However the person could only open the zip file in a PAF program whereas they could import the GEDCOM file into any genealogical program.

19. Notes, Sources, and data:

- a. - Data goes into your PAF program (birth date, christening place, spouse, name of father, occupation, etc).
- b. - Source is where a piece of info came from (census, state vital record, family bible, etc) and may include a repository (where the source is located, like a book in a specific town library).
- c. - Notes are everything else about the person (like the 10 line census entry, the 4 page history, the one column obituary, why a particular child was added to the family, why a certain set of parents were selected rather than another potential set of parents, etc.)

Notes can not only be searched but they provide a rich set of information about the individual or marriage. I paste lots of items (histories, census extractions, obituaries, etc) into a person's notes section. It is located when you click on the individual and see the vital data. On the right is a pencil and pad, which is the location of notes. You must save the note after each entry.

I consider a source to be the place where I could reconstruct the info. Where could I send for the certificate. Who has the original family bible. What newspaper did the obituary come from. I do not use "family records" as a source, it is too broad; nor do I consider a downloaded genealogy file as a source (since it is hearsay, by definition, unless it provides specific sources; it is, however, a very helpful roadmap). A source is different from histories, obituaries, research comments, all of which would be in the individual's notes section.

Sources can be included in PAF by clicking on the "s" on the individual screen where you go to sources. If a source is listed, the "s" will show as "\*s". A source is the specific place where the

info came from (vital records, family bible, census, etc.). PAF will keep a list of sources you have used previously in case you want to open an old one and not have to retype it, or you can create a new one. (Double click on the "s" or click on the Individual sources box). A source has a general title (Massachusetts Vital Records), author (State of Massachusetts), publication info (book publisher in Boston), repository (if the book is in a certain library), call number (if a book), actual text (if you want) and comments (if you want). The info specific to an individual is located in the Citation section (page #, date of event, actual citation). In theory you would have a source for every piece of vital info, but in reality much info is a combination of things which would be reflected in the notes section of the individual.

Both sources and notes go with the data wherever you send it (if you want it to be included). You can combine duplicate sources in tools, merge duplicates and you can view sources in edit, source list.

20. Downloadable pedigrees: RootsWeb, Familysearch.org both have GEDCOM files you can download (they export) (to your hard drive, to whatever name you gave them) and inside of PAF you import the file into your database and match/merge to link them together.

21. Copying and pasting info into notes: I like to copy the info on the 1880 census into the notes section of my person in PAF. When in Familysearch.org, search, census, and you find info on a given family, hold your left button down and drag it to include both the census info and source (they'll turn dark) - with your cursor over the dark space, right click on your mouse and copy; then open a notepad and paste it (right click on the notepad, click on paste); then in the notepad hit edit, select all and copy it again. Open PAF, find the individual of interest, click on them, click on notes, and within the note section, right click and paste the info. It's pretty neat. When I am doing many census searches, I may have 5 windows opened at the same time.... my PAF is opened, then notepad opened, then Familysearch.org (1880 US census & all); then geographic namesaver ( //stuff.mit.edu/cgi/geo (to verify places); then rootsweb.com then family tree, then advanced (to do quick searches on names), then google.com (more quick searches on names like "John Pugmire" Idaho) and finally KCLS.org (King County Library system) click on database, genealogy, heritage.quest, put in my library card number (can apply on line), click on census search, click on advanced, then search various census as needed.

22. The IGI & Addendum are part of Familysearch, it lists individuals with completed ordinances (no family links (except sealings); searched by region (where the event occurred). Once an ancestor is identified, highlight the name, press enter, enter and detailed info appears. Use this to update your PAF at home. You may do a parent search, with your ancestor's name highlighted, press F8 to begin a parent search, "enter", F12 to begin. You will see the names of others who had the same parents (possibly brothers/sisters).

23. TempleReady is part of Familysearch at the Family History Center. Open Family Search. Open PAF. Restore the back up disk you created at your home PAF (exported to TempleReady) in PAF at the FHC. Make note of the path and name of the file. Exit PAF. Enter TempleReady, click "update", highlight the path & name (or browse), and click "open". If you want to check all, click "edit" and "select all"; if you want to click only some, you need to do it manually. Compare records, Yes/No. Summary appears when computer done. You may leave early (cancel) and the records will be saved in the FHC PAF hard drive. One common problem with temple ready is upon submitting names, the box "submitted" is automatically checked so the word appears in all temple dates, but those names will not necessarily end up being cleared at the family history center, so I always uncheck the "submitted" box. If the date box has "submitted" and you were to retry to submit the person, they would not qualify since the computer thinks the work has already been done (anything in the box is assumed to be a date by the computer). You can remove the "submitted" manually or use the global search and replace (tools, global, date, fill in Sub 10 Oct 2004/whatever was in your box in "search for" and nothing in "replace with" and it will delete the info and give you a list of RINs where the deletion took place. Near the end of TempleReady , if you clicked the box "create GEDCOM", the individuals whose names were cleared for temple

work will be recorded on an .oup file on your floppy. At home, click on file, add temple ready update and submitted (Sub) will be entered in the dates. After your TempleReady program has identified the names to go to the temple, create two disks, one labeled Temple Submission and the other Backup in case the first disk was bad. At the temple they will use the disk to generate the slips for each individual and couple.

.....It will take time to get accustomed to any new program like PAF, however once you do, it will flow like riding a bicycle with no hands.... Completely effortless on your part.

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**Here is a simplified version of PAF usage:**

Simplified introduction to Personal Ancestral File (PAF) genealogy program. (Denney Pugmire, June 2006)

1. **Why PAF:** There are dozens of genealogy programs. Most cost money. Some have more features than PAF and some are more complicated than PAF. Why PAF then? Because it is free, it does virtually everything I want it to do, and it has been continually upgraded by the LDS church. However, if I were choosing a genealogy program for the first time, I would choose one that a friend is using so I could ask them questions about how it works. All LDS family history centers have people who can instruct you in PAF, so that may be a natural choice.

2. **How to get it:** It is a free download at familysearch.org. It's in the bottom right hand corner of the home page. Most LDS family history centers also have free CD's they can give/loan that you can use to install PAF on your home computer. On the internet site, you will need to give familysearch your name and email address. You can download a single language (English, Chinese, German, Japanese, Korean or Swedish) in 5.2 or all languages combined (4 times larger file). In the prior version 4.0 (same home page) you can download French, Portuguese and Spanish. The users guides (separate download) are voluminous but fairly helpful. The English lessons are quite helpful (separate download). PAF Companion (costs money) is a printing program that lets you print pedigree charts in a variety of shapes and colors like a bow-tie, a fan, etc. It's cute, but I don't use it.

3. **Naming and backing up files.**

When you first download PAF, you will create a new file - call it your surname and today's date... such as JonesJun23. Then periodically rename the file (using save as, JonesJun24, JonesJun30, etc.) to have a later version that is more updated. This will save the agony of having a single file, that if corrupted or changed by mistake, is lost or completely messed up. You would have an earlier version that is not too old that you can work from. I save the files under "my documents" and may have 5 or 10 earlier versions. Of course I am careful to open up the latest version when I start my work.

I back up my files (creates a zip file about 20% the size of the original with no loss of data) under "my documents" a couple of times a week. Weekly or monthly I will preserve my latest back-up (zip) file in three ways: email the zip file to one of my children (attachment to an email) so they can view it or just store it on their computer; secondly, I will burn copies of my zip files to CD's and store them; and thirdly I post my entire database (export all and upload) to rootsweb.com where others can use it and where I can retrieve it in its entirety if ever needed (rootsweb.com, family trees, submit (or update), use their default settings (I use advanced to

allow 10 generations of download, and text file to view pedigrees). Rootsweb protects the rights of privacy of those born after 1930 with no death date and reflects "living" for them with no data (even though the data is there). You control your database 100% and can remove it anytime.

**4. Files related to PAF (.PAF; .GED; .ZIP).** When I created a file, I like to look at the disk under "my computer" to see that the file is really there and has some size to it - otherwise I may get somewhere and have a blank disk.

A. Gedcom: All genealogy programs will have their unique file name with their unique code written for their program. One does not recognize the data from the others (it cannot open another's file). In a mutual agreement, most programs use a transfer system (export and import) between programs called gedcom (genealogical data communication) which shows up as a .ged file that virtually all modern programs use. When you download from rootsweb or familysearch, or when you export names for temple ready, all of them are gedcom files. Gedcom files, when imported into your database, must be linked (merged/stapled) to be connected to the rest of your database.

B. Paf & zip: Your PAF program creates a file named .PAF. It can only be opened (file, open) in a PAF program. When you back it up, it creates a .zip file which crushes it about 5:1, a huge savings of space when you are storing or sending the file to others. The zip file is "uncrushed" in PAF by using file, restore (and identifying where the file is) and it "magically" appears in your paf program (you can see the name of the unzipped file on the blue top of your screen). The files I email to my children, or store on CD's are all zip files since they take so little space.

#### **5. Inputting, deleting, and changing files.**

If you can picture your PAF files to have two 3x5 cards on each person. One is vital info like birth, death, sex, profession, census, baptism, sources, notes, etc; and the other is marriage info the same person. These cards can be separate in your database or attached (stapled) to another as spouse(s), child, parent(s). How or what you send to someone, how or what you view on the screen, how or what you print, those are all looking at the data with certain screens, but the data is whatever the data is.

There are three ways to input and change data in paf. You add/delete from the family or pedigree screens. One way is using the file names across the top (like add, edit, view, etc.), second way is using the icons on the second line, and thirdly, using your mouse to double click on what you want to do (like blank space for spouse/parent to add them; or the blank space for children to add a child, or double clicking on a certain person to bring up their individual 3x5 card and adding or changing their info).

To delete individuals and marriages, right click on the name (or the marriage box) and click on delete. There is no undo function, so be careful. To delete large groups or pedigrees, you can click on someone (so their box is darkened), click on Control & F at the same time (which is the same as search, individual), click on advanced, change the filter to reflect whatever you want to delete, click on delete, and you will delete the ancestors or descendants or family, etc. But there is no undo function in PAF, so be careful to back up first if you have any doubt about what you are doing. You can also delete groups in PAFInsight using the edit rins, trim (they do have a temporary undo function)

You can add more categories to your screen (like immigration, military, census, etc) by clicking on options for the individual; or you can change the global template (tools, template, new, arrow over, drag order, save, make active) for global changes of categories. For example, I have globally added "AKA"-also known as to my template so it is right under a person's name and in

front of their sex; I use it for the numerous name variations which are census, etc.). However, most things (other than vital, temple, prefix title, occupation and AKA), I use the notes (double click on the individual, click on notepad, then type in the histories, notes, ideas, obituaries, census results, etc. and click on save). My notes go with the data when I send it anywhere, so someone can read and enjoy it as they like.

Sources can be included in PAF by clicking on the "s" on the individual screen where you go to sources. A source is the specific place where the info came from (vital records, family bible, census, etc.). PAF will keep a list of sources you have used previously in case you want to open an old one and not have to retype it, or you can create a new one. A source has a title (Massachusetts Vital Records), author (State of Massachusetts), publication info (book publisher), repository (if the book is in a certain library), call number (if a book), actual text (if you want) and comments (if you want).

A source is different from histories, obituaries, research comments, all of which would be in the individual's notes section. In theory you would have a source for every piece of vital info, but in reality much info is a combination of things which would be reflected in the notes section of the individual. Both sources and notes go with the data wherever you send it (if you want it to be included). You can combine duplicate sources in tools, merge duplicates and you can view sources in edit, source list.

## **6. Moving around in PAF**

There are two ways to move around PAF. I use the advanced focus filter where I click on the alphabetical or RIN indexes. Go to a- search, advanced focus filter or b- search, individual, advanced, or c- use the hot key -Hold down Control and "F" at the same time, click on advanced, click on the alphabetical or RIN circles on the top and put in who you are looking for. The second way to move around the database is by using the individual list and scrolling to the person you were looking for. If you click on Full name or RIN (on the top), it will reverse the order you are looking at. Once you find your person, double click or highlight and click on family or pedigree. Of course a third way is to look at the pedigree view screen and click on an ancestor that you want, then find the member of their family, but that is not very efficient.

## **7. Advanced functions of PAF**

There are two places where most of the advanced functions of PAF are found. One is file, print reports and the other is tools, the first 4 categories and preferences at the bottom. The simplest way to learn these is to save your database as practice (file, save as, name it practice) and go the various screens and experiment. You're can delete the "practice" file afterwards (my documents, right click on the name of the practice file, click on delete), so it doesn't matter what you have done to it, it has no effect on your original file.

You can export some or all of your data, you can import other data and merge (staple) them to our database (tools, match/merge), you can print reports that have individuals, families, group sheets, pedigree charts (with index if you want), either individually or cascading (on to the end) or you can print blank forms. You can print the data to a printer or to a file (in case you want to email it to someone) and you can select what you want to include or exclude (preferences). There are reports (file, print reports, lists) of unlinked individuals, possible problems, places sorted alphabetically and other reports... however always preview the various reports so you don't end up with 30 pages you didn't anticipate.

Under tools, preferences you can use/not LDS data, select a person (RIN) to shows relationships of everyone in your database, capitalize surnames, attach things to a name (like RIN), changed the info of who prepared the database, change the font size, change the template.

You can add multimedia (edit individual screen, click on camera) and create a disk in scrapbook that integrates the data and picture; however remember that pictures are on your hard drive, and only links are in PAF; so when you send PAF (except the creation of scrapbook), you are not sending the photos but only the address link of the photos.

## 8. Add-ons to PAF:

There are two add-ons I find extremely helpful. PAFPal and PAFInsight. They are produced by Ohanasoftware.com and are completely independent from the LDS church who publishes PAF. They cost about \$20 each and can be downloaded from the Ohanasoftware site. Most LDS family history centers will have both programs at their sites. Even if I didn't use PAF, I would export (all) my data from my program to a gedcom (probably to "my documents", open a new PAF program, import my data, use these various functions to clean up and systematize my data, then export (all) back to my original program where I would have to create a new file name and import that cleaned up file; sounds painful but after you have done it a couple of times, it flows quite easily.

A. PAFPal has two features that allow me to globally change all two letter state abbreviations (and England) to the full state name (or the reverse) and globally add (or delete) USA from all entries (that have state names). I use these to keep my database consistent. Perhaps you downloaded some genealogies from rootsweb.com or a cousin emailed you a gedcom of their database and the new entries had the opposite that you have; this gives your database consistency.

(Note: Along this same consistency theme, I also use PAF to change all names to Mixed case -1st letter capitalized like writing your own name - it in PAF, tools, 4th one down is change names to mixed case; however I want the name to appear capitalized on my screen - PAF, tools, preferences, names, click capitalized box and I want it to be capitalized when I print pedigree and family group charts - PAF, file, print reports, preferences, click capitalize surname box).

B. PAFInsight has 5 features that are very unique and helpful.

Their edit places shows you an alphabetical index of all places (with the number of times it appears) and allows you to change a place either by typing or dragging and dropping it onto another place that is more correctly written. If you're not sure about a place (correct spelling or to get a county name), you can minimize your screen (dash mark in top right hand corner) and go on-line to geographic namesaver (<http://stuff.mit.edu/geo>) for US names (type in any part of the name) or familysearch.org (library, family history library catalog, places) for worldwide places.

Their merge function is superior to PAF in that it shows you a % likelihood that you have a match (70% and up quite likely, 50% and below very unlikely). However, neither PAF nor PAFInsight's merge functions have an "undo" function, so you need to back-up your file first since the changes are not reversible (although you could manually go back into your program and retype the original).

The compare and sync function allows you to put two databases side by side and show the differences between the two, and merge the 2nd one (on the right) into the 1st one (on the left) by selecting which specific things you want merged. The latest changes on right function is very useful. Say you and your brother are working on the same database, at the year's end, you can put the two side-by-side and come up with a master.

The edit rins function allows you to change RIN's (an arbitrary number given each person you incorporate into your database). Some like RIN #1 to be a certain relative (like me) who is the primary person. If you drag the bar to the bottom, you will see clumps of people who are not attached to the main pedigree. You would need to write their name/RIN and research them to

see where they should be attached. (PAF only shows you isolated people not attached- file, print reports, lists, unlinked individuals, preview; not clumps not attached).

The search igi function (the IGI is the LDS ordinance index for deceased, hundreds of millions of names; posted within 48 hours of temple work being completed). As a non member, you can search the IGI through familysearch.org by clicking on search, IGI, typing in your name of interest and general place and searching (where you will get birth, marriage and death info); however as an LDS member, you can go to the same site, sign in (user name and password gotten from LDS member number and confirmation date) and you will get the same vital info plus temple ordinance dates. The advantage of PAFInsight is you can upload your entire database into PAFInsight, click on search IGI, sign in, select filter ("needs ordinance" but this will only search for people with at least a birth date and place with no temple ordinances; or lacking ordinance, or all) and then put up to 250 people in a waiting cue for searches. You can transfer data from right (IGI) to left (your database) if boxes are checked and you click on Update; this transfer can take place while your search continues or while others are being searched. This function has saved me hundreds of hours as I have cleared names for temple work for the LDS church (since it can search while I am eating dinner or sleeping) and my time is spent transferring data rather than sitting and waiting for the computer to complete a search.

## 9. Lessons for learning PAF.

There are several places that have free online and printable PDF files for lessons for PAF. The most effective way to learn is probably at an LDS Family History Center where someone can sit side by side and instruct and tutor you. Unfortunately, most facets of genealogical programs are not very intuitive.

Three places for good lessons. a- Excellent PAF lessons are BYU Religion 261 course which has 14 extensive PAF lessons (<http://abish.byui.edu/specialcollections/fhc/start.htm>). b- At Ohanasoftware.com, click on lessons, then scroll down to Online Classes from the St. George Regional FHC; also Beginning PAF by Liz Snow; and Powerpoint Presentations for Teaching PAF5. c- PAF itself (if you downloaded the lessons) has 7 lessons that are quite good (PAF, help, lessons). You could also print out the PAF Users Guide (198 pages) - the book is large but quite extensive (PAF, help, users guide) although you could simply view the pages you are interested in.

Sunday School classes are available at BYU 261, free PDF downloads (same address as PAF lessons above) as well as Ohanasoftware.com's "lessons".

For general genealogical research, there are courses on various kinds of research available at BYU's independent study (link at the bottom of Ohanasoftware.com or go to byu.edu at <http://ce.byu.edu/is/site/courses/freecourses.cfm>). Ancestry.com has a free learning center, click on ancestry library for the various articles available. Cyndislist.com has a section for "beginners" where there are hundreds of topics to choose from.

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### **To clean up a database, I do several things:**

(Note: PAFInsight and PAFPal are accessible through PAF, tools menu, down towards the bottom).

- First rename the file so you don't hurt the original (PAF, file, save as).
- Change all lettering to Mixed Case (PAF, tools, mixed case).
- Cause the screen view to see the surname in caps so you can spot things wrong with surnames (PAF, tools, preferences, names, capitalize).

- Cause the surname to be printed in caps on all reports (PAF, file, print reports, advanced, caps).
  - Expand all state abbreviations to full words (PAFPal, clear/change, expand).
  - Delete all USA so you can focus better on your locations, although when you export to rootsweb, or pedigree resource or temple ready, add back the USA (PAFPal, clear/change, delete USA).
  - Combine the places through PAFInsight so the names are consistent and as full as possible. For example, change Oh. to Ohio, Penn to Pennsylvania, St. John's cemetery goes in front of the place, etc. (PAFInsight, edit places, either type the change or drag and drop the wrong one into a better one).
  - Delete all "living" individuals from the database, (imported individuals who were born after 1930 with no death date) by using: (PAF, Advanced Focus (Control F), advanced, define, name (bring across), contains "living" AND name (bring across, does not contain "Livingston"; click on search, click on OK, click on show results, click on delete (no undo function)).
  - Remove the terms "unknown", "private" from dates and places by replacing them with nothing (PAF, tools, global search and replace, search for "unknown" and replace with (blank), click OK).
  - Check the database to see if any clumps are not attached to your main database (PAFInsight, edit rins, drag bar to bottom to see other pedigrees) and either research and connect, or delete the stragglers.
  - Do a match/merge to eliminate all duplicates (PAFInsight, match/merge, down to 50%).
  - Look at the possible problems report from PAF (PAF, file, print reports, lists, possible problems, preview) to see children out of order, persons born before they were christened, buried before they died, children born before the parents were married, etc. Most corrected under PAF, file, edit.
  - Run a PAF check /repair (PAF, file, check/repair) to eliminate any errors.
  - Rename the database (file, save as, rename with later date) to know you are working with the most updated version and save a back-up of the file to my documents.
- ... All of these little tasks give you a database that is pretty to look at and consistent in places and formats. It's a little bit of a pain, but in a rather short time, you can clean up a database and make it much more usable.

#### Searches when examining a new line or individual:

When I get a new line to verify, or focus on an existing "end of line", there are certain quick searches I do. If I receive a book of ancestors or if someone comes to the Family History Center with a pedigree chart and some group sheets, before typing the info, I try to find it (downloadable) on-line and save them the time and errors of typing. All of these are free. The order doesn't matter.

1. Check rootsweb.com, click on family trees, click on advanced, put in as little info as possible (so you don't miss your hit because someone else may have entered the data slightly differently; vary the input- like first name of husb, last name of wife, year of bir of husb +-2, etc.).
2. Check familysearch.org, click on search, put in as little info as possible
3. Do a google.com search. Type in the person's first and last names in quotes, maybe year of birth, maybe place of birth or the spouse's last name and see what hits you get... modify the search data.
4. Check message boards at rootsweb.com for both the surname and the county (if you have a known county where the family was). When you find the message board, check the box to stay within that message board, and search for your ancestor in the find box. The messages posted have the email address of the person posting the messages/answers.
5. Check the place (if you know your ancestor was from a certain county) in usgenweb.org where you click on the state and then on the county and go over the various records they have on line. If it's outside the US, check the same thing in worldgenweb.org
6. Check the surname distribution in King County Library (kcls.org) by doing a census search. Click on database, genealogy, heritage (although America's obituaries is pretty nice also), put in

your library card number, click on census, click on advanced, put in your surname and see what comes up in the various census (they have 12, but indexed by head of house only). You can do the same thing in the 1880 census in familysearch.org, search, census.

7. Check gensmarts.org (free at your FHC, but you can download at home a free trial program that is quite amazing; good for 30 days, has 85% of the full version). Analyzes missing data and gives you recommendations as to where to look for the data. Will connect you into free sites where the data may be available. You can analyze it from PAF or simply input info and have the program analyze it.

8. At a Family History Center, check your ancestor in Ancestry.com. It is a paid service at your home but free at the FHC and King County Libraries. Ancestry's records are remarkable. This is the only annual service I subscribe to for my home computer (but for most people it's too expensive; so use it at the FHC or County Library).

9. Check the areas you are looking for at cyndislist.com. It is a compilation of other genealogical sites, but it is massive in nature and very helpful.

10. Check the familysearch.org library to see what records are available in your area of interest. Click on library, click on family history library catalog, click on place, enter your place.

11. Check the familysearch.org research guidance (1<sup>st</sup>) and helps (2<sup>nd</sup>) for ideas of which records to look for. Click on search, click on research guidance, scroll down to find your state or country, click on it, click on the time frame and see the suggestions. Click on a particular suggestion and with the name, you could do a google search to see if the info is on-line, but if not, then you could order the film. Secondly, click on Research helps, click on your country or state and see the many (downloadable) PDF files available on a variety of topics related to your location.

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Please feel free to email me at [denneypugmire@yahoo.com](mailto:denneypugmire@yahoo.com) for any comments or corrections. Surely some of this just won't make sense when you read it, or my explanations are inadequate, so give me a heads up and I will modify my explanations. I'm hoping that the mechanics of recording are easier so you can focus on the challenges of the hunt. ... Best wishes, Denney.