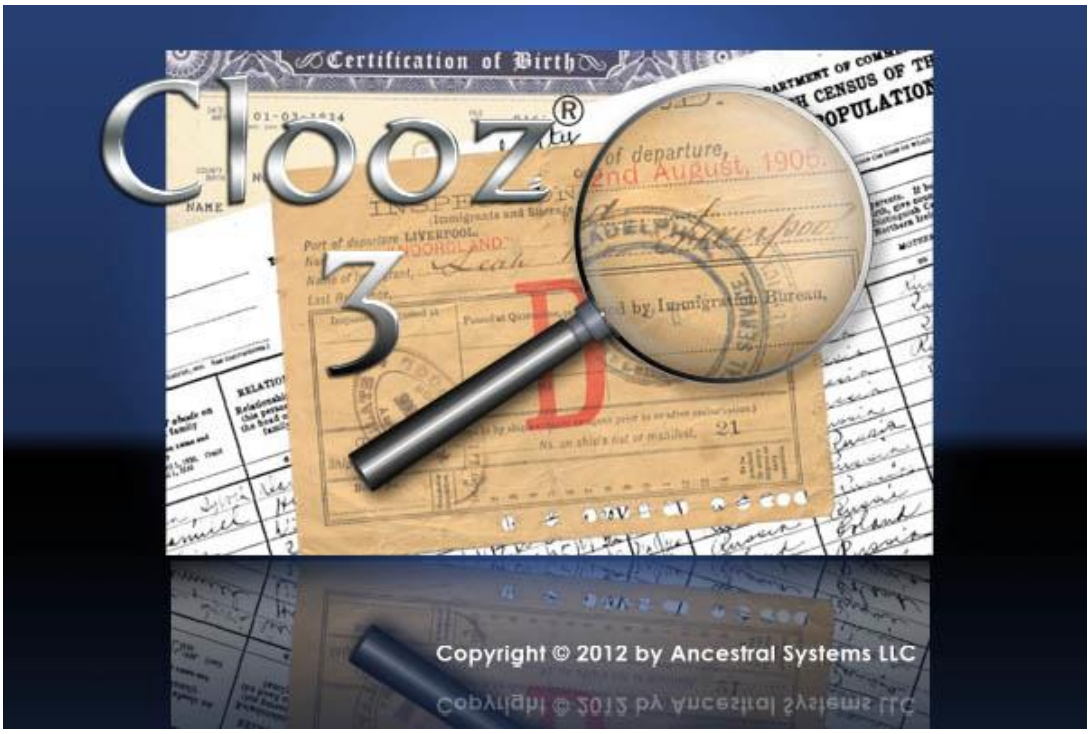
Clooz 3 User Manual

Ancestral Systems, LLC



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Welcome to Clooz!

Welcome to the Clooz family. We're glad you've joined us. Sit and visit awhile. We are proud to provide you with an upgraded and easier to use version of our tool supporting genealogy research, Clooz 3! Clooz will help you organize your stacks of family history records, documents, photographs, and notes so you can find something quickly. Even more important, Clooz will help you organize and review the information contained in these documents to begin the process of sorting out which people belong in your family tree.

You—our users and friends—are very important to us. Like a close-knit family, we'll give you personal attention and communicate often in several ways. If you want to learn how to use Clooz, or just see the latest Clooz news, visit the Clooz home page (http://www.Clooz.com) and sign up for our online mailing list.

Best of all, we are as close to you as your computer. If you've got a problem, send us an e-mail and you'll get a prompt reply. In fact, it's as easy to contact us as calling your sister, brother, or other family member. No red tape or endless phone menus. What's more, these services are free for registered users.

Like the world of genealogy, Clooz is changing. Version 3 contains many new features and revisions that you'll discover here. If you have suggestions for changes, additions, or ideas for future upgrades to Clooz, feel free to send them to us by email at ideas@clooz.com.

We hope you enjoy Clooz. We are so proud of it we provide a money-back guarantee for CD purchases through the Clooz website. Now isn't it time to stop postponing organizing your family records and start using Clooz today?

Clooz Online Resources

Clooz Home Page	http://www.Clooz.com
Clooz Training Videos	http://clooz3videos.ancestralsystems.com
	http://www.facebook.com/cloozbyancestralsystems#!/AncestralSystems
	https://twitter.com/CloozJoe
Clooz User's Forum on RootsWeb	http://lists.rootsweb.ancestry.com/index/other/Software/Clooz.html

The Clooz approach

In order to understand how to best use Clooz, you will need to understand the Clooz approach. You're probably familiar with genealogy software programs. You enter the names and pertinent information about people in your family. That is a lineage-linked program. Clooz is a genealogy utility program. You enter documents (that contain people), so it is called a document-based program.

Each record in Clooz is treated as a unique entity. A marriage certificate is one record; a will is one record; a census of one family is one record or a census of an entire municipal area is one record as long as the same enumerator recorded the information. Each of your records needs to be viewed first from the vantage point of the record itself, not the people contained in the record. For instance, Clooz identifies a census record by its year, geographic location, and supervisor's and enumerator's district (if applicable). That information is the same for every person on that page of the record.

You take four major steps to enter information into Clooz:

First, examine your existing family tree and research files to identify any documents which might not have been fully analyzed, or areas where additional research is needed. Use the Clooz Research Log to organize your research tasks. Once a document has been found, it's ready to be entered into Clooz.

Second, create a Clooz record from your actual document. If it's a census record, you would select the country and census year from the explorer bar on the left side of the screen, and then add location information onto the main census form. The source of the document should be recorded, and any digital files you created or obtained relating to the document can also be attached to the document record for easy retrieval and viewing.

Third, add details about each person from that record. The information pertaining to each person is linked to an individual in Clooz's list of people. You could select the person to link to the document manually (before entering their details), or let Clooz automatically create a new person in the database based on the personal information entered from the document (requires a name be entered).

Fourth, save the document and people associated with it. Use the report generator to analyze the data in many different ways. If you let Clooz generate new people from each document entry, you could then merge together the records of people once you can accurately determine they are in fact the same person.

In a nutshell, that's the Clooz approach, and it applies to all the records you put in Clooz. You no longer need to load up your lineage-linked database with people that might possibly be your relative. Let Clooz be the repository for all your documents, and move the appropriate people to your family tree after doing a proper analysis.

What's new in version 3?

Clooz version 3 includes some significant changes to its user interface, making it much more flexible and easier to use than previous versions. We have strived to make the program more useable, without having to change your work habits. Clooz now provides better support for the paperless work environment, while maintaining its longstanding features for organizing physical files. For those who are upgrading from previous versions of Clooz, your existing data will be upgraded to the new format, now a single database file (.cdb extension), still in the Microsoft Access 2003 format.

Composite View

Introduced in Clooz version 3.2, the Composite View is a hierarchical display of data records on the main screen which visualizes the links between people and documents, between documents and sources, between sources and repositories, and in fact, between nearly all the ways data in Clooz are linked together. It is a great way of analyzing your data. You can easily toggle the main screen back and forth between the original grid layout, and the new Composite View.

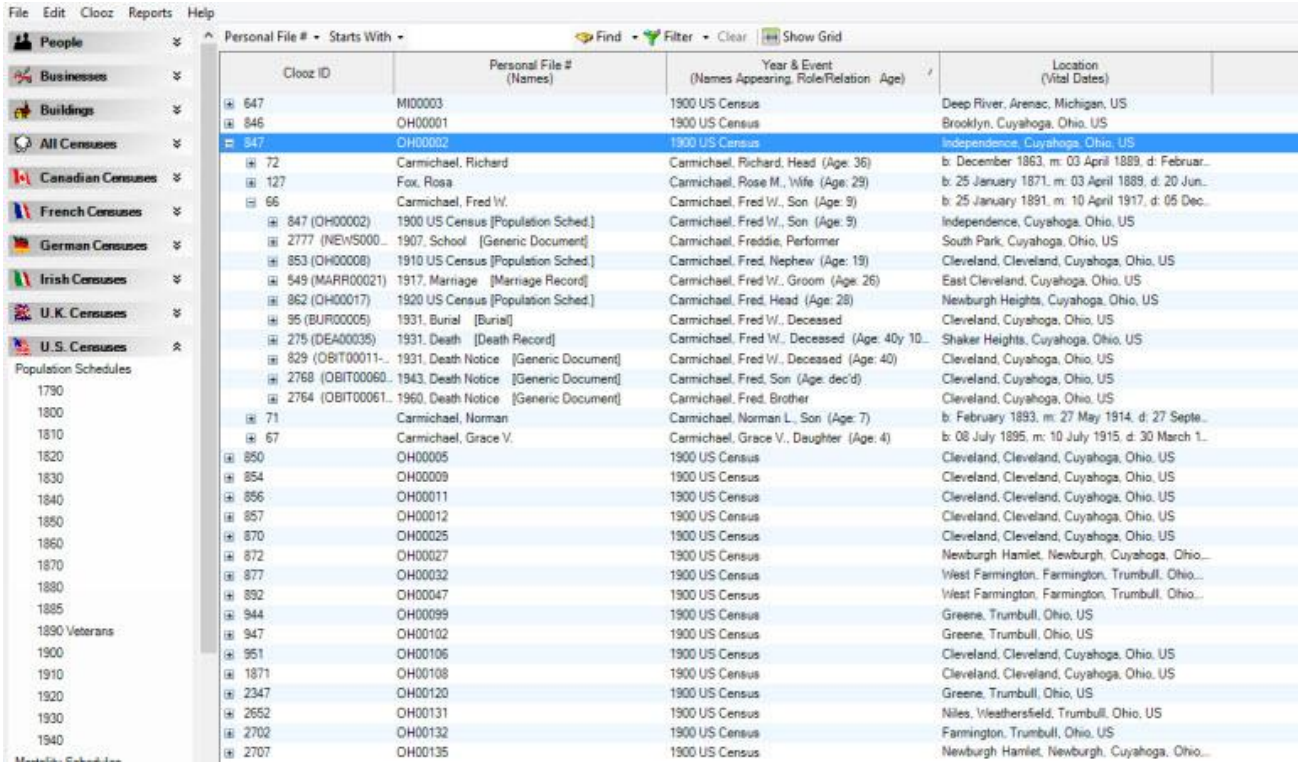


Figure 1 - Composite View

Improved data import and export capabilities

Version 2.1 had established the shared use of a database file (.fdb) with Legacy Family Tree software. To provide more flexibility and simplicity, once the older database files are upgraded to version 3, all of your Clooz data will be in one file (.cdb). In version 3, data importing was given a substantial overhaul. Clooz now allows you to directly import individual and source information from the latest versions of Legacy Family Tree, RootsMagic, Family Historian and The Master Genealogist data files. Data from other programs (such as Family Tree Maker) can be imported using GEDCOM files. In each case, you are able to control the selection of which people should be imported from the other file. There is also now the capability to merge two Clooz databases.

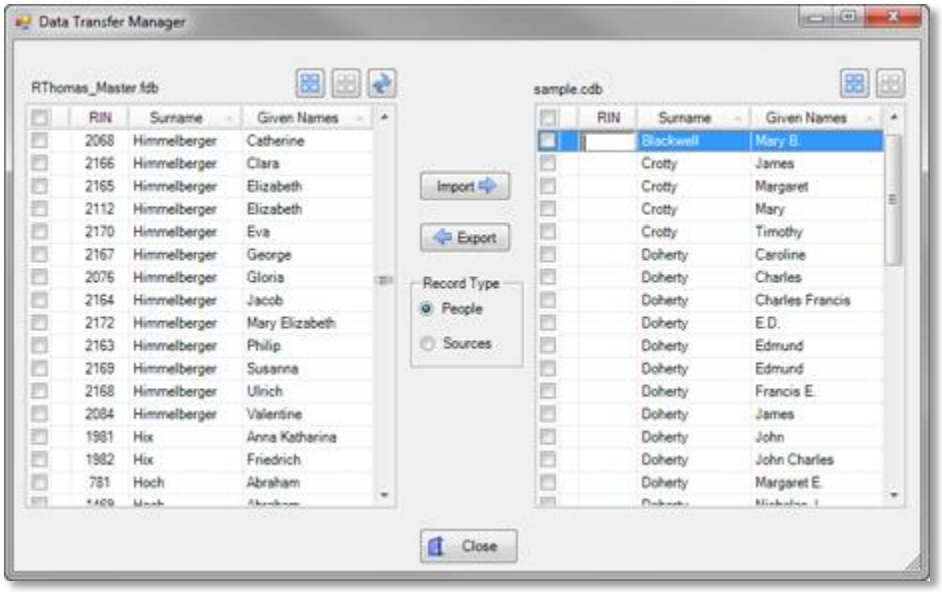


Figure 2 - Data Transfer Manager Window

The new Data Transfer Manager has replaced all of the version 2.1 GEDCOM import options, and eliminates the decisions you previously had to make regarding interfacing to Legacy Family Tree software. Therefore, the opening menu to select actions has been simplified. New databases always start empty. You can selectively import whatever records you choose using the Data Transfer Manager. Clooz will automatically prompt you to upgrade a file if you attempt to open a database from an older version.

Export Documents to Other Programs

Version 3.3 of Clooz implemented a whole new level of export capabilities to Legacy Family Tree. Export support to RootsMagic, FamilyTreeMaker, and The Master Genealogist (via GEDCOM) was added in versions 3.4, and Family Historian in version 3.5. This export capability takes a Clooz document in the form of all the people linked to the document, the source (and repository) for the document (with all attached media images), and then automatically generates events for each of the people which are supported by the data in the document. For example, consider a census document for which you have entered all the details shown on the census form for each person in a family. When exporting the census document to Legacy, Clooz will add the people in Legacy (or use existing people in Legacy if links have been established), and then create the census event in Legacy for each person. It then generates other events supported by the data in the census, such as birth dates (based on person's age at the enumeration date), residence (containing the street address if entered on the census form), occupation, etc. Then the source for the census is automatically cited for all of these events. Various media files and images that you had linked to this census document in Clooz will be attached to the events, source details, and source in Legacy. All of this occurs with the click of one export button. When exporting to other programs using GEDCOM files, you designate the name of the GEDCOM file to be produced and then import it into the other program using its import or merge capabilities. Other than that, the process is similar. Of course you are left in complete control of which details get exported using the features on the Document Export form.

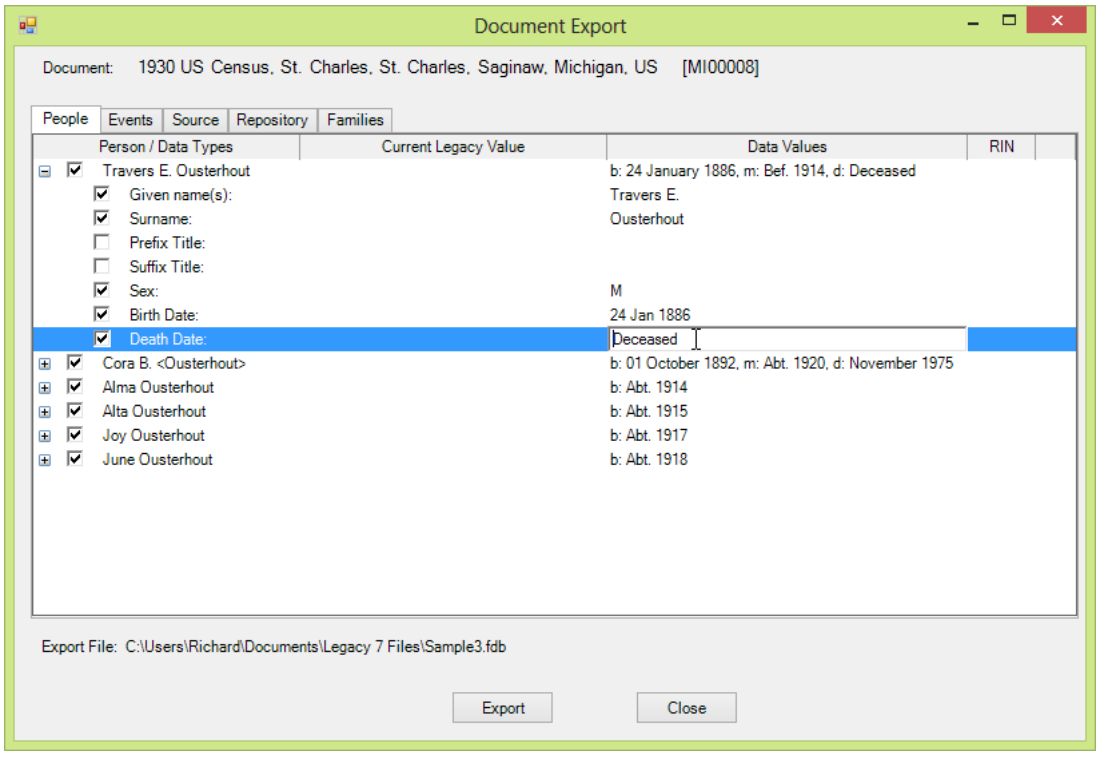


Figure 3 – Document Export Form

It is even possible for you to designate the parent-child relationships and build families so that the exported persons are properly linked when they appear in the other program.

New document templates and reports

Clooz version 3 includes templates and matching reports for several censuses released to the public following the previous Clooz version:

1940 US Census

1911 UK Census

1916 Canada Census

Better handling of digital files and URLs

Version 3 of Clooz now allows you to attach multiple files or URLs (Internet website addresses) to a single document or source record. You can select which image should appear on the template form when viewed on the screen or in certain reports. Digital files attached to documents can also be given unique descriptions. Attaching the files to a Clooz document couldn't be easier. Clooz now supports drag and drop mouse operations between Windows Explorer (My Computer) and the digital files list. You just click on the desired filename and drag it into Clooz. Copy/Paste clipboard operations are also supported. In a similar way, you can record an online document's URL by simply clicking on the browser's small icon by the web address and dragging it into Clooz's digital files list.

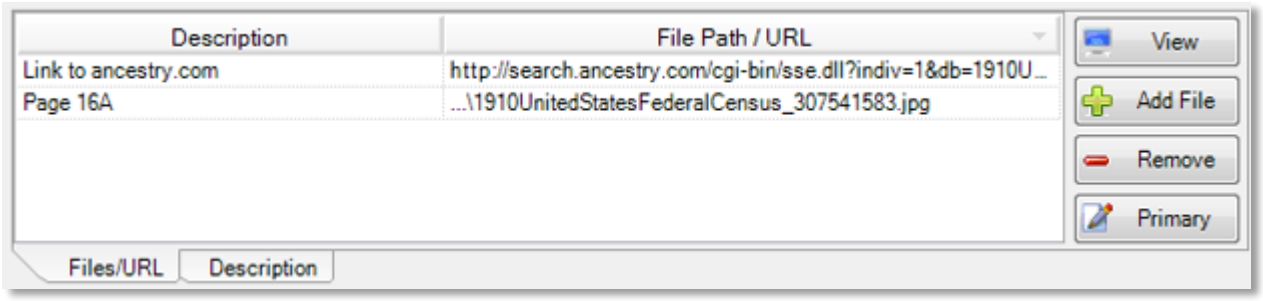


Figure 4- File and URL Tool

To better organize digital files, an option was added to specify a root directory which contains some or all of the digital files attached to your Clooz document records. Those files located within this directory structure will list an abbreviated file path, where "…\" appears in place of the longer root directory path. Digital files not saved within this directory structure will show their own full path name.

Improved tools for identifying and locating people

A new column was added when displaying lists of people showing other surnames used for that person. Each time a person is linked to a document, the details for that person include the given name and surname as it appeared in the document. The 'other surnames' field is a list of all the

unique spellings used, as well as married names. The list is maintained automatically by Clooz based on the document details you enter. Married names can also be added in a person's vital details.

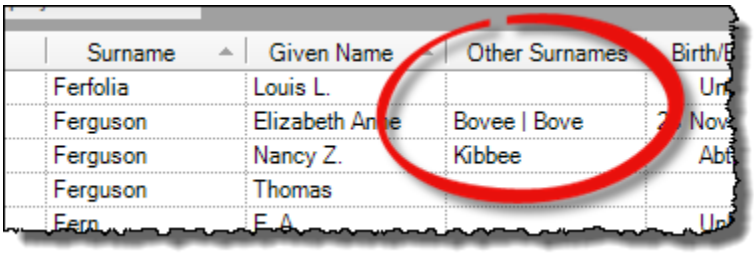


Figure 5- Other Surnames Column

A new toolbar was added to the main window of Clooz to allow you to easily enter some search criteria to either find the desired person (or whatever is being listed) or filter the list to only show a subset of the data. For instance, with the list of people displayed, the default column setting is *Surname*, *Given Name* and *Starts With*. If you enter "th, r", and click the Find button, you would jump to the first person whose surname started with "Th" and had a given name starting with "R". If you had just entered "th", without the comma and given name or initial, Clooz will search the surnames alone. Finally, Clooz provides even more advanced combination searches using the advanced Find and Filter capabilities accessible through the down arrows on the Find or Filter buttons.

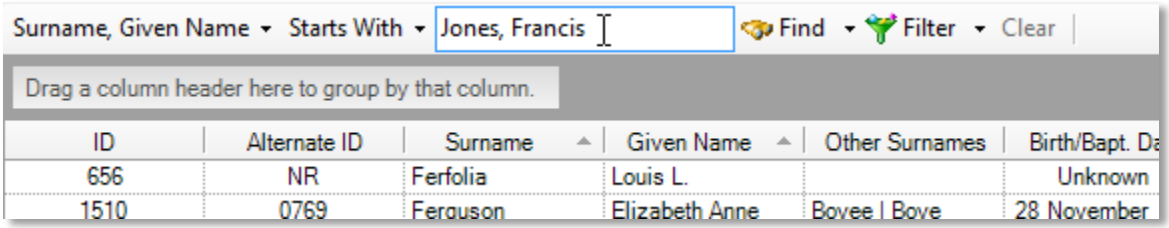


Figure 6 - Search Tool Bar

Improved addition and handling of people

In previous versions of Clooz, you had to link a person to a document before entering their details. Before linking, this person had to already exist in the database, or be added at that point. You no longer have to go through those extra steps (although you still can if you wish). Each document type allows you to just fill in the document details for another (new) person. Clooz then takes the information you entered (which includes Given Name and Surname), and creates the new person record and sets up the link, all in one step. You can now take a document and enter its contents in a

sequential way without having to prejudge who the right person is in your database that matches the one in that document.

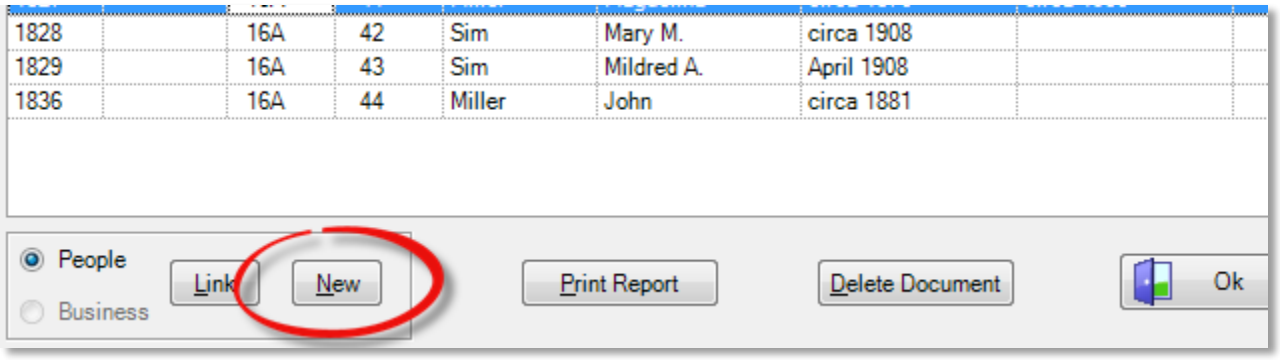


Figure 7 – Button for Adding a New Person Based on Document Details

If you think about this for a second, you are probably wondering how you deal with the multiple names for a person that might accumulate if they appeared in several documents, and the *New* person feature was used in each case. Clooz 3 provides the capability to merge multiple records for people into one person record, and to clone a person (which, with further editing of the original and cloned records, would be used to separate the data for a person into different people; undoing erroneous links).

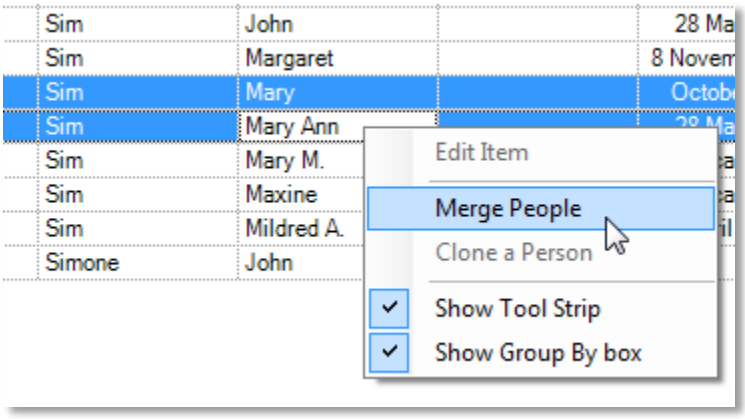


Figure 8 - Menu Item to Merge People

These capabilities not only make Clooz more flexible and easier to use, but better support best practice research techniques. Decisions on whether people listed in various documents are in fact the same person should be done after careful analysis. Clooz allows the researcher to maintain them separately in the database until they can confidently merge them (or keep them separate).

Faster capture of source information

Templates for entering source information for the document records entered were added in Clooz 2. However, in the excitement of finding new documents and entering their information, a common shortcut used by the casual researcher is to skip over the entry of source information. This omission of information later proves to undermine or destroy the credibility of the information that was entered. Clooz 3 addresses this by making it easier to record the source information using a new feature called the Quick Capture text box. Each of the source templates now allows you to highlight source information, say on an online data repository web site, click on it and drag it from your Internet browser right into Clooz (copy/paste could be used the same way). It is then captured within that source record, where you can then further dissect it into its component part and copy/paste into the appropriate template fields for proper formatting. If you are not sure the document is meaningful, you could delay the reformatting until a later time so long as you are sure you have captured all the source information you'll need.

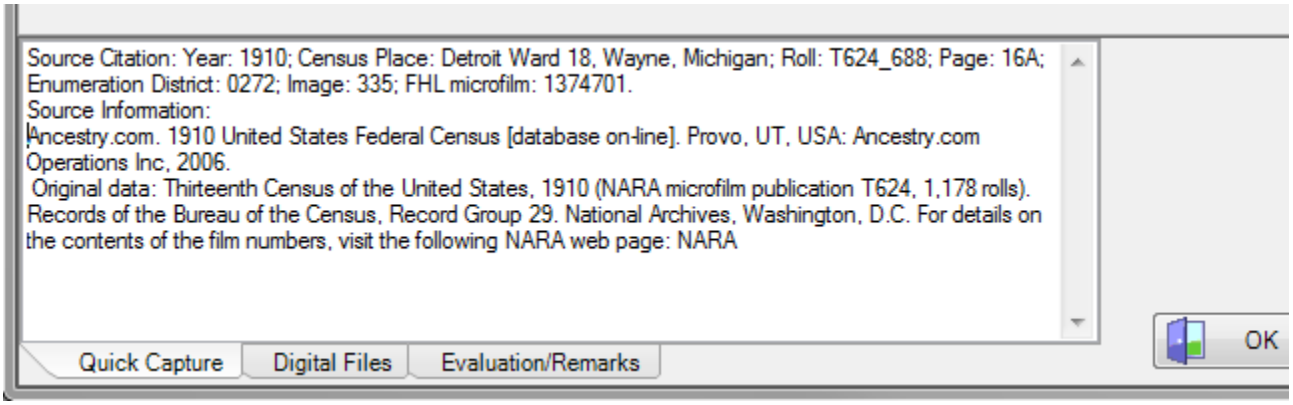


Figure 9 - Quick Capture of Source Information

Improved flexibility of use

Clooz version 3 is now designed to provide you better options and tools to use it in whatever way you need it to. Prior versions tended to push certain workflows and data organization patterns. This is no longer the case. Fields like the Personal File Number are still there to support physical file organization and locating, but it is now optional, and no longer is required to be unique.

Previous versions of Clooz required you to go to a certain list or place in the program to edit items such as documents, sources, and repositories. Access to many of these editors is now available in multiple places. To edit a census document, you can do it from the main list of censuses (as with prior versions), or from the list of censuses that appears within a person's details (i.e. the list of censuses they appeared in). Repositories can be edited from the list of repositories, or from where they appear in the source form. All of these changes are designed to provide you access to what you need at the point where you need it, eliminating extra keystrokes and time of exiting out of one thing to get to another.

In previous versions, Clooz would always open in full screen mode. Clooz 3 opens in the same state (maximized, normal, minimized), location and size as it was displayed when it was last closed.

Clooz 3 allows improved sorting capabilities for people in documents. For instance, you can now sort on page and line numbers for display of people in census documents to have them appear in the order in which they appeared in the census.

Many of the data entry fields will automatically capitalize the first letter (such as M or F for sex).

An additional drop down list was added to support census relationships (to Head of Household).

Editable combo boxes (with drop down lists) now support copy/paste clipboard operations.

New capabilities to edit lists

Most of the lists in Clooz (that appear in dropdown selection lists), are generated through accumulated user input. This often leaves you with misspellings or duplicate entries. Clooz 3 solves that by allowing you to merge together multiple items in a list. Together with add and delete capabilities, you can customize your lists to suit your personal situation. A Check Usage feature is useful when identifying where a list item is used.

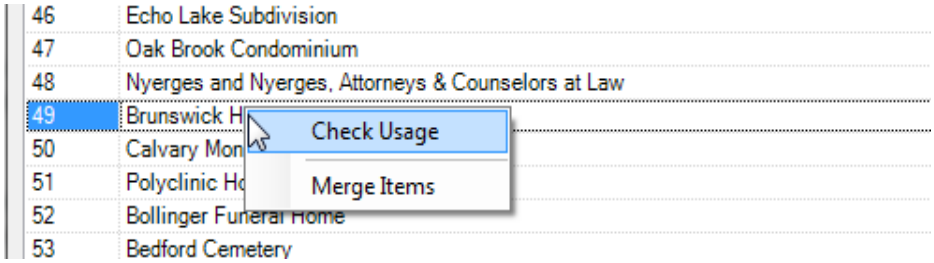


Figure 10 - Context Menu Functions Supporting List Editing

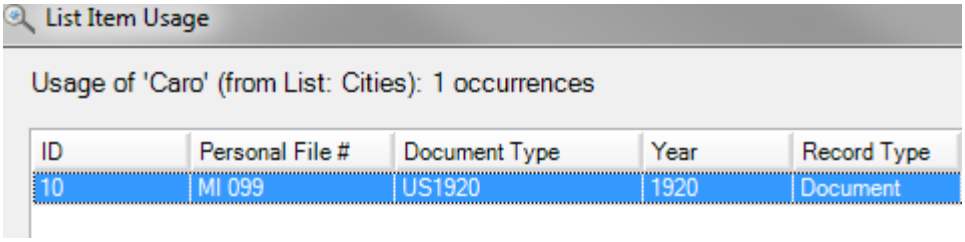


Figure 11 - List of Occurrences for an Item

Improved Report Generation

Report generation in Clooz version 3 has been improved through optimization of the database activity in collecting the data for the report. This results in faster appearance of the report you wish to view. Numerous other small corrections were made to the report templates or data.

Automatic online updates

No software is perfect, and issues will always be a fact of life. However, Clooz version 3 contains an updating capability to download the latest updates to the software. This gets you fixed and updated in short order. Likewise, smaller improvements can be distributed without waiting for the next major version. An option exists for you to turn off the automatic check that otherwise occurs each time you start Clooz. You can also manually request a check for updates at any time. Updates will not be installed in any case without your approval at the time.

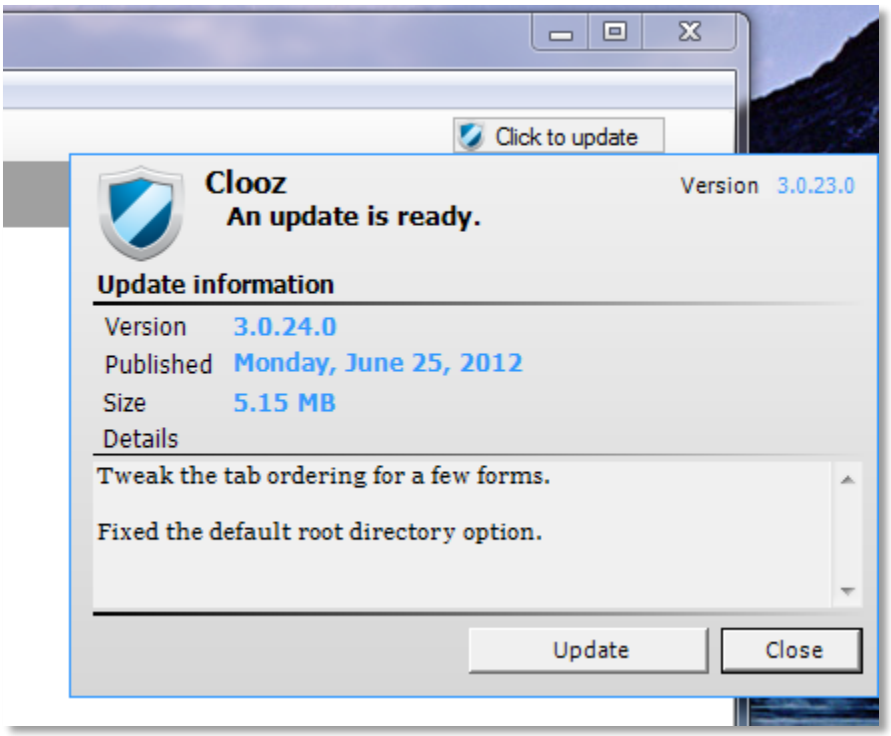


Figure 12 - Popup Window When an Update is Ready

Clooz Features

Clooz Main Window

Navigating around Clooz is fairly straightforward. All of the features available in Clooz can be easily reached from either the Clooz Explorer Bar or the Clooz Menu Bar.

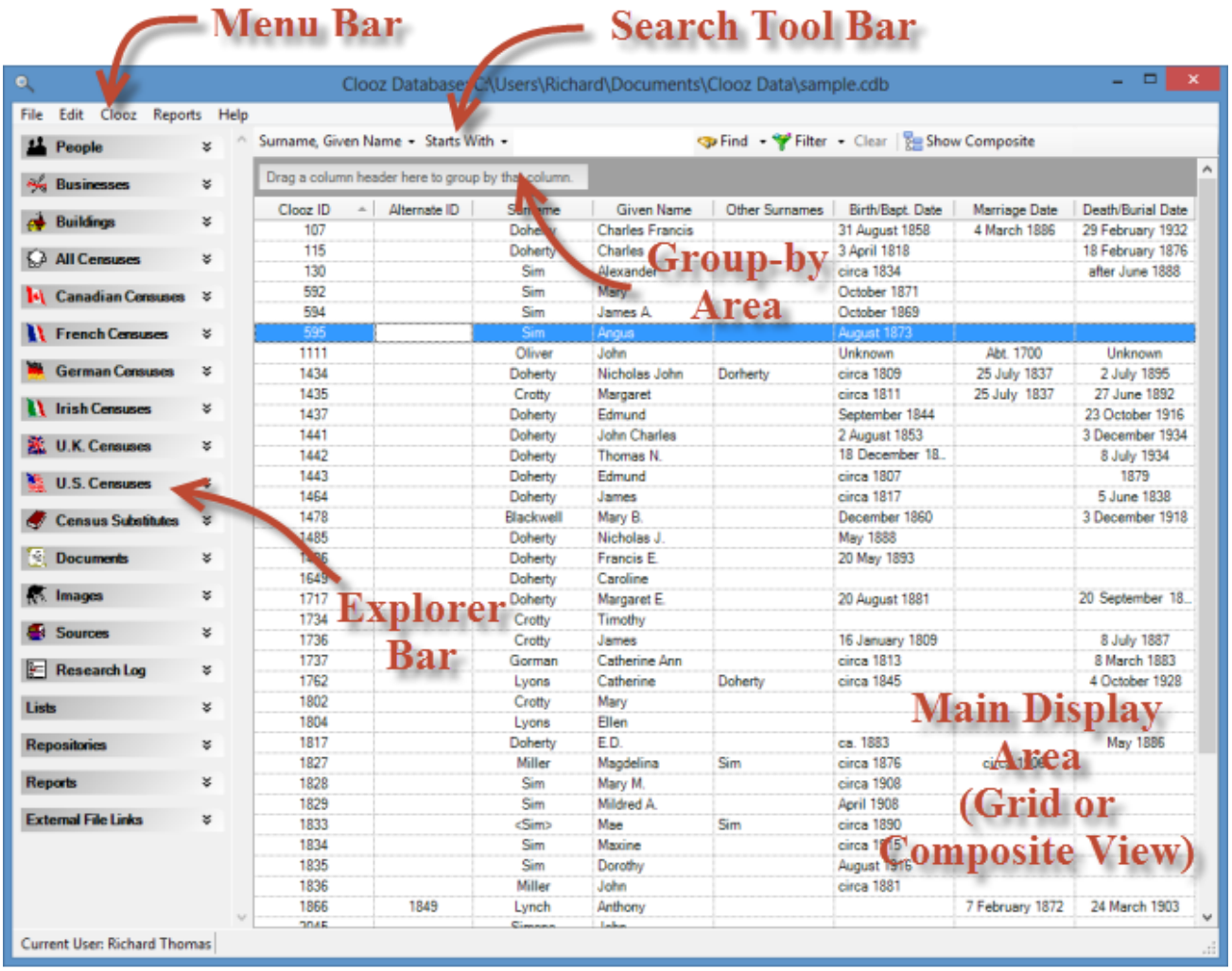


Figure 13 - Clooz Main Window

Explorer Bar

The Clooz Explorer Bar is on the left side of the Clooz screen (see Figure 14), and will be your primary tool in navigating through your data stored in Clooz. From here, you can access the forms you need to enter people, businesses, buildings, censuses, census substitutes, documents, images, sources, and research logs. Click on any of those choices and that category opens up to show you the forms available for data entry. For the people, businesses, buildings, research log, and repositories categories, the only choice available from the explorer bar is to add a new record. The rest of the categories on the explorer bar have specific forms to choose from for your data entry. You should see entries to the right of the explorer bar in the grid for that category, if you have data entered under that category. This is where you will see all of the entries you have entered thus far.

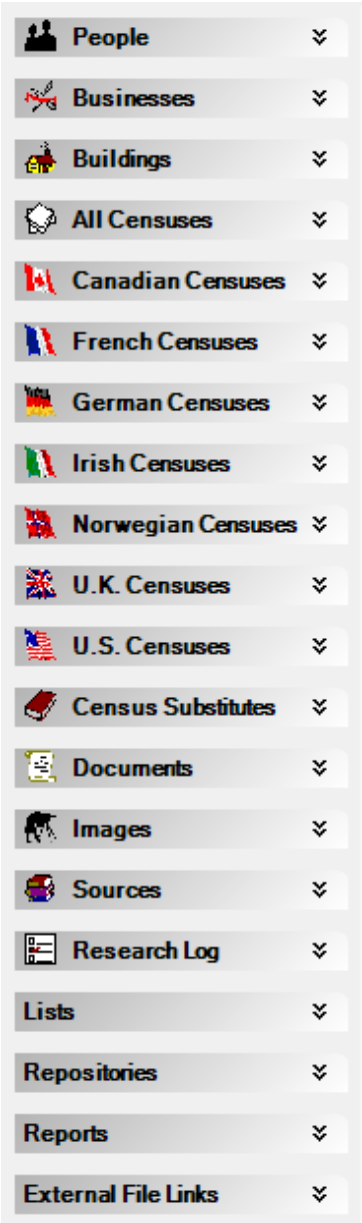


Figure 14 - Explorer Bar

When you change to a different category by clicking on one of the choices in the explorer bar, the category you were in will collapse and the new category will expand to show the choices available there.

The four choices at the bottom of the explorer bar—lists, repositories, reports, and External File Links—are different than the other categories. The Lists category allows you to edit any of the drop-down lists that are available within Clooz. Sometimes our fingers get away from us on the keyboard and we have misspellings that remain in the dropdown lists until corrected. Click on Lists, find the list you want to edit, and select it. A screen will pop up with all the entries for that list. There are instructions on that screen for adding, editing, and deleting items.

Repositories can be added in Clooz when you're working in the Source forms, or you can add them from the explorer bar. If you need to edit a repository after it has been entered, you would do so by selecting Repositories from the explorer bar and finding the repository to edit on the Repository grid, or by the context menu (right-click) off a repository referenced by a source (source window).

If you converted your database from Clooz 1.x, your repositories will be in the list here, but you might want to check each one because only the repository name was converted, not an address or other location information.

When you click on the Reports category, the Reports screen will open. You can also see the Reports screen by clicking on Reports from the menu bar on top.

Finally, the External File Links category displays a list of other files from which you have imported data. Selecting a database name in the list will reopen the Data Transfer Manager with that file.

Menu Bar

Clooz has a menu bar along the top of the screen providing access to many of the program's features. If an item on a menu is greyed out, it is not available to you in the screen you are in currently. Most Clooz functions are only enabled when a database is open.

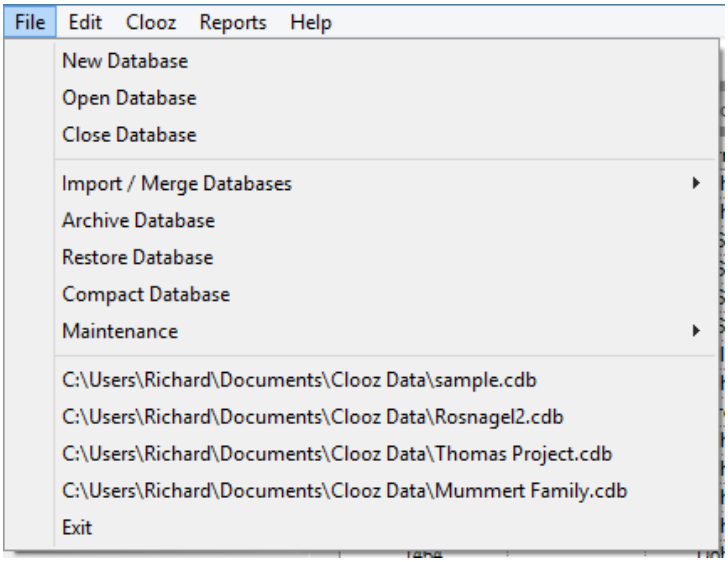


Figure 15 - File Menu

From the File menu, you can create a new database (blank), open an existing database (if it is not the current version, Clooz will prompt you to update it), or close a database. The Import / Merge Databases menu item leads to a further list of possible sources to input from. Importing will be covered in detail later. Menu items to archive your database, restore an archived database, or compact a database are also provided. The Maintenance item contains a command to reset the main Grid configuration if the Grid is not being displayed properly. Of course, you can use this menu to exit the program. Additionally, the last four databases you have used will be listed at the bottom of the File Menu so you can quickly select the database you want to open.

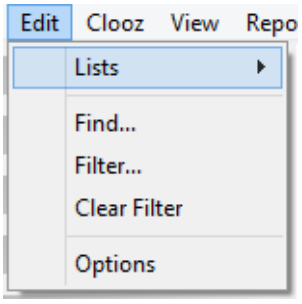


Figure 16 - Edit Menu

The Edit menu allows you to Edit Lists, perform search and filtering functions, and change the program options. In the Options window, you can choose how to open Clooz, either with the database you used last time you were in Clooz, or you can select the database you want to use each

time Clooz opens. These and other settings in the Options window will be covered in detail in a later section.

The *Clooz* menu lists all of the same categories as shown in the Explorer Bar. Likewise, the Reports menu item opens the Report window (same as pressing the Reports button in the Explorer Bar.

The Help menu items include the Clooz Help (this manual), and links to various websites where you can obtain additional information. There is an item to let you enter your serial number, as well as manually request Clooz to check if any updates are available. It would not be necessary for you to check for updates unless you turned off automatic updates in the Options window. Finally, like most Windows programs, the About window can be displayed, which is the way you could see which version of Clooz you are using.

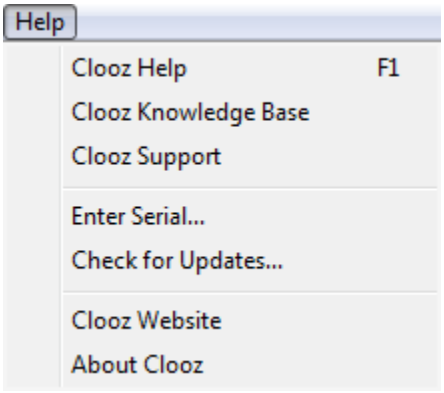


Figure 17 - Help Menu

Main Display Area

The large area of the main screen contains either the Grid View or the Composite View. The selection between the two views is made using a button on the Search Tool Bar, located at the top of the display area.

Grid View

The large grid of data comprising most of Clooz's application window is used to display list of people, businesses, buildings, documents, sources and repositories according to what you have selected in the Explorer Bar. The default display when a database is first opened is the People display. Clicking on another button in the Explorer Bar will display the data associated with that category.

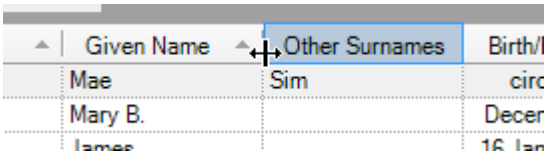


Figure 18 - Grid Column Resizing

You can customize the column sizes, position order, and sort order for the data for the grid associated with each of the data categories. These settings are saved automatically when you exit Clooz, and can only be reset to the initial default position by using the Reset Grid Layout Settings button in the Options window (Edit Menu). You can change the size of the columns by hovering the cursor between the column header labels until a cursor appears with arrow points on both ends of a horizontal line. Clicking and dragging at that point will change the width of the columns.

The small triangles on the right side of some of the column headers indicate which columns are controlling the sort order, and whether to order is ascending (upward pointing) or descending (downward pointing). Most sorting is done in alphabetic order (currently English alphabet only). However, when you sort by the dates columns, Clooz will now attempt to interpret the dates entered by the user to place the rows in correct chronological order. Unrecognized dates will sort ahead of dates it can interpret.

You can change the sort order for the grid by just clicking on the column header you want to sort by. To reverse the order, click a second time on the same header. If you want to sort by multiple columns, such as by Surname and then by Given Name, click on the column header you want to be the primary sort. Then hold down the SHIFT-key and click on the other columns you desire as secondary sorting, in order of decreasing precedence. So in the case of Surname and Given Name, click on the Surname header, then hold down the Shift-key and click on the Given Name header.

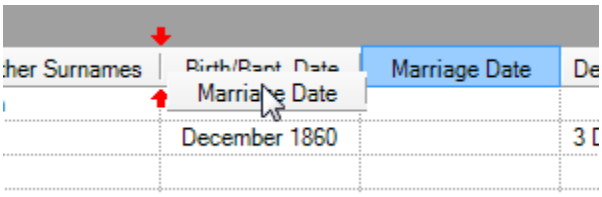


Figure 19 - Grid Column Positioning

You can also change the position order of each of the columns by clicking and grabbing a header and dragging it to a new position (indicated by red arrows between the next pair of columns). To remove a column, just drag it off the top of the screen. However, if you do that, it can only be restored by resetting all of the grid layouts using the reset button in the Options window, which would return all grid settings to their default values.

If you want to edit an item in any of the grids, you simply double click on that item and it will open for editing. If you want to add a new item, select *Add Person* or another choice from the explorer bar. The context menu (right-click) provides access to some additional commands. In each grid, *Edit Item* will open the item selected for editing the same as if you had double clicked it.

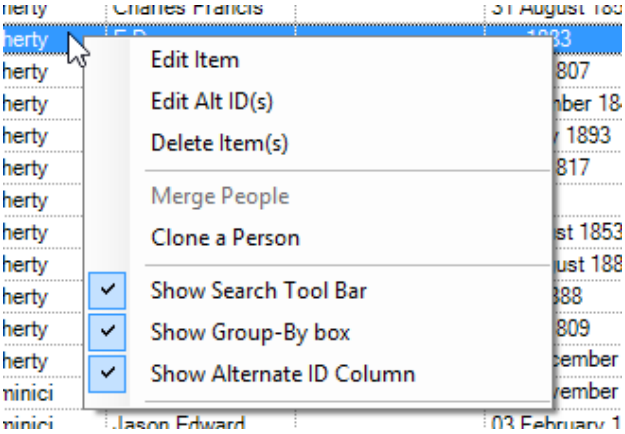


Figure 20 - Main People Grid Context Menu

The *Edit Alt ID(s)* command allows users to enter a single Alternate ID for one or more people. This could be useful for those users who use the Alternate ID field for designating family groups.

In the case of the grid for People, there are menu items for Merge People and Clone a Person. *Merge People* will only be enabled when more than one person has been selected. You can select multiple people by holding down the CTRL-key while clicking on additional people to select. Holding down the SHIFT-key will select all people between the one you click and the first person you clicked. Clicking on *Merge People* will open a form for you to select the name to be given the new (combined) person and to validate the operation. Likewise, *Clone a Person* is only enabled if one person has been selected, and duplicates all data associated with the person selected to create a new person, whose details are then presented to you for further editing. Merging and cloning will be discussed in more detail in a later section.

Clooz version 3.3 added the capability to export people, sources, repositories, and all of the various types of documents to Legacy. The command to initiate this feature appears in this context menu whenever a Legacy Family Tree database has been designated as the Primary external file (External File Links view), as well as commands to show the IDs used in the external database such as Legacy.

Finally, all grids will contain options to display the Group-By box and the Search tool bar. A check to the left of the item signifies they are displayed. Click the item to toggle the display on or off to suit your own desires. Note that the Search tool bar will be restored to view each time Clooz is restarted, whereas the Group-By box's visibility will be preserved with the rest of the grid column settings.

Group-By Box

When you're in the main grid, you can grab a column header and drag it to the area above the columns that says "Drag a column header here to group by that column."

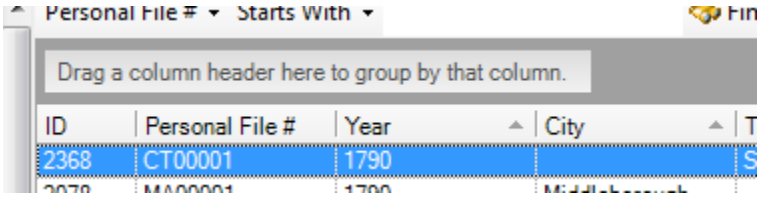


Figure 21 - Group-by Box

So, you can drag Surname into that "gray area" and your list will be grouped by surname. Grouping is similar to sorting, with the added feature of being able to collapse all of the rows with the same value into one by pressing the small button with a minus sign, or expand back out with a plus sign. For example, this could prove to be useful when working with censuses, and grouping by year. The normal column sorting is still applied, between the data in each grouping. Dragging more than one column heading into the gray area to get a primary and secondary sort is possible but not all that helpful, usually.

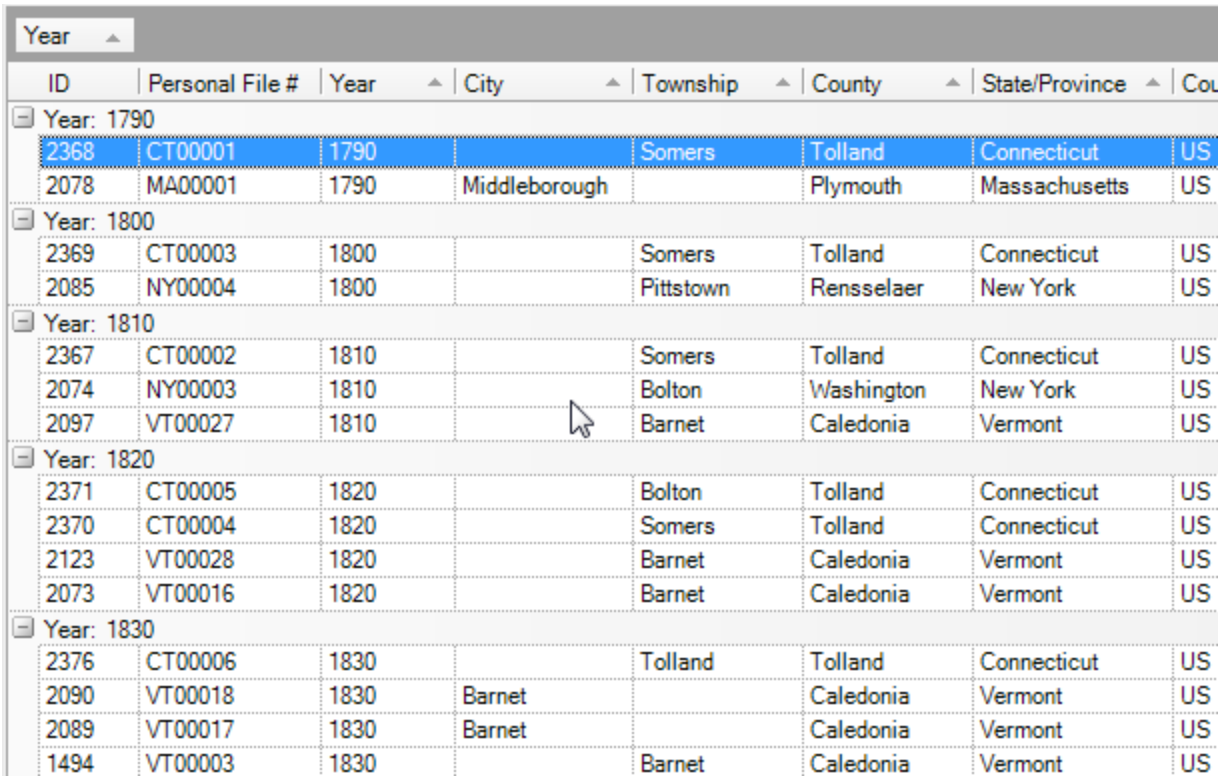


Figure 22 - Census Grid Grouped by Year

To return the display to ungrouped, just drag the header box from the Group-by box back down to its normal position with the other column headers.

Composite View

Beginning with Clooz version 3.2, the Composite View was added to the main display area. The Composite View gets its name by bringing together all of the records that are linked to each other into a single display. These records are then displayed in a tree-like structure for easy viewing.

Figure 23 - Composite View

When the Composite View is first displayed, it will list all of the same records as displayed in the Grid View, according to the particular Explorer Bar button which was selected. The editing functions in the context (right-click) menu and the Find/Filter functions work the same in the Composite View as they do in the Grid View. When a person is selected from a level below a document (document is the next higher level in the tree structure), you have the option of either editing the person, or the document detail for that person.

If a record is linked to other record types, an expansion button is displayed on the left side of the row. Clicking this expansion button (plus sign) will cause the linked records to be displayed below the record initially selected. Double clicking a row also expands the data. After a row has been expanded, the button on the left side will now show a minus sign. Clicking it will cause the linked rows to be collapsed, and only the top level row remains in view.

If starting from a list of People, expanding a person results in all the documents, images, buildings, and research log items appearing that person is linked to. Clicking on one of those documents will expand to show all the people and businesses linked to that document. You can continue to dig deeper down into the tree structure until 5 levels are displayed (the maximum Clooz allows to be displayed at one time).

The full set of possible record combinations appearing in the expanded groups is shown in the following table:

Top Level Record Type (As selected in the Explorer Bar)	**Record Types Appearing in Expanded Lists**
People	Documents, Buildings, Images, Research Log items
Businesses	Documents, Buildings, Images, Research Log items
Buildings	People or Businesses
Censuses and other Documents	People or Businesses
Images	People or Businesses
Sources	Documents, Buildings, Images, Research Log items
Repositories	Sources or Research Log items
Research Log items	People or Businesses

Relationships between Record Types

In some cases, you will be seeing a mix of record types appearing within the same expanded list of records (as listed in the table above). In order to make it easier to identify the type of record each one is, Clooz inserts a (Map), (Photo), or (Research) designator in the second column for all image and Research Log items.

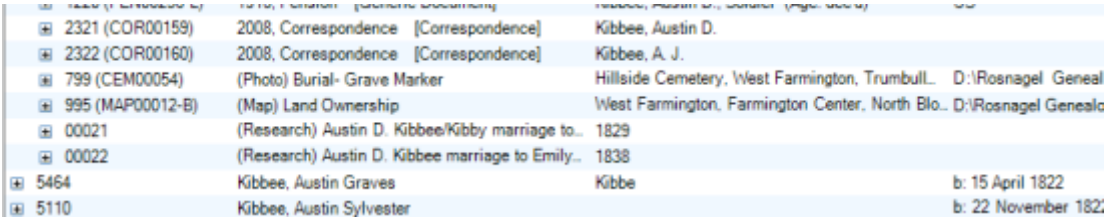


Figure 24 - Record Type Designators in Composite View

The sort order for how data records are displayed in Composite Views is controlled by clicking on one of the Composite View's column headers. Only one column can be selected for sorting at a time, and this ordering only will apply to the top level record types. Appropriate complex sorting is preset for each column. For instance, for the Surname, Given Name column, the sort order is defined as being primarily by Surname, and then by Given Name, and then by birth year. Locations are sorted by Country, State/Province, County, and City.

The column headers in the Composite View will list the format for the contents of each top level row and the first set of expanded records below the top level row (in parentheses on the second row of descriptions appearing in the headers).

Figure 25 - Composite View Header Example

Search Tool Bar

The Search tool bar is new to Clooz in version 3, and provides a fast way for you to locate a data record, especially if you have been using Clooz for a while and have accumulated lots of data. The Search tool bar sits just above the main grid and Group-by box. Its use applies only to the grid displayed at the time. The Search tool bar has several components.

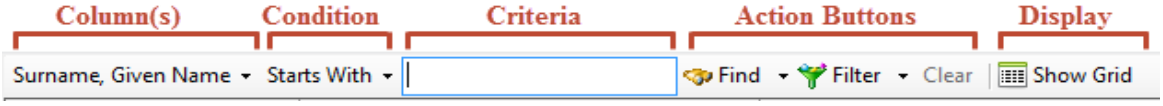


Figure 26 - Search Tool Bar Components

The first component is a drop down list of columns which can be searched. In most cases, these are single columns. However, with the people grid, a combination of Surname and Given Name is supported, as well as Other Surname and Given Name.

The condition component is next, and is another drop down list. There are three choices, Starts With, Contains, and Equals. A search will find the first row where the value in the designated column either begins with the text in the criteria box, contains the text in the criteria box somewhere within it, or exactly equals the text in the criteria box. The matches are not case sensitive, so don't be concerned about capitalization. You execute the search by pressing one of the action buttons.

The Find button will locate the first matching row. The Filter button will change the entire grid to only display those rows meeting your criteria. The Clear button will return a filtered display to the full grid display. The Clear button is only enabled when the grid is filtered.

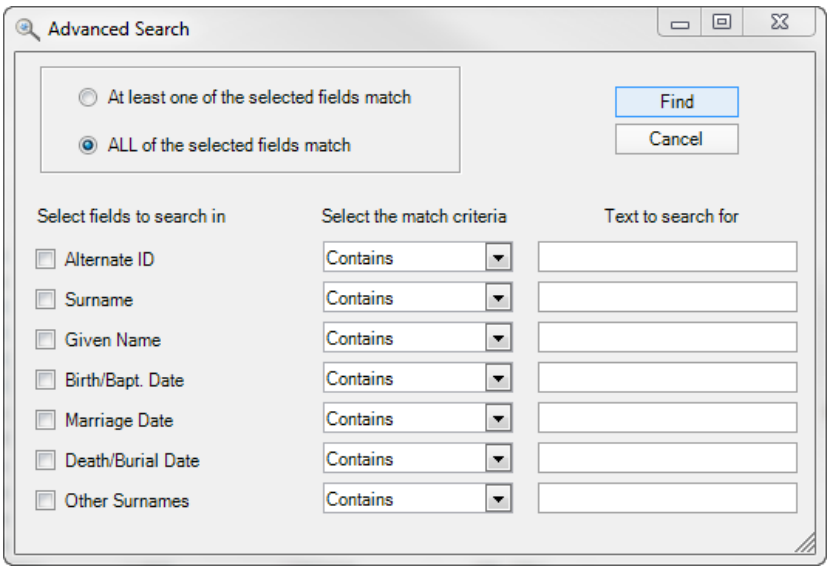
A few tips and shortcuts:

When searching for names in the Other Surnames column, it is best to use Contains as the condition, since the field could contain multiple names. Using Starts With in that case would only evaluate the first or possibly several names for that person.

When you select the option for multiple columns (as in *Surname, Given Name*), the text entered as criteria must be in that format. If you do not enter a comma, the search will revert back to a single column search using the first of the multiple columns (in this case, *Surname*). Thus, you can leave the column designation as the multiple case, but only enter the comma and Given Name when you really want to. When you do enter values for multiple columns, the condition is applied to each column separately. Thus if you select *Surname, Given Name* with the condition *Starts With*, and enter "th, r" as the criteria, you will Find the first row with a person whose surname begins with "Th" and a given name that begins with "R".

When entering the criteria text, pressing ENTER will execute the Find function.

On the right side of the Find and Filter buttons, there is a drop down triangle section. If you click on this small section of the button, the drop down list will appear showing the options of *Simple* and *Advanced*. *Simple* is the behavior described above. *Advanced* will cause a new form to appear which allows more elaborate combinations of data to be located.



The advanced search window lets you formulate any combination of fields to be tested, and you can designate whether all of the columns you select (using the checkbox) must be met, or at least one of them. A Find or Filter button will appear to execute the search, depending on which tool bar button you selected for the advanced search.

Figure 27 - Advanced Search Window

Clooz Databases

Once you install and open Clooz, you create a database. Don't know what a database is in the first place? You'll find out here, as well as how to create and change or select databases.

What is a database?

A database program, like Clooz, lets you store a large amount of information, quickly find certain data, and analyze and print everything you've entered. Think of a database this way: imagine you've got a large file cabinet of your family history research. Some of you won't have to stretch your imagination too far. One drawer is full of census records, another is overflowing with copies from city directories and other census substitutes, a third drawer is packed with vital records and other documents, and the fourth file cabinet drawer contains all the family photos. A database is like your file cabinet full of papers. But it can manage the data much better electronically on your computer.

Selecting a database

When Clooz opens for the first time, you will be asked to enter your User Name. Once you do that, you'll be presented with a screen to choose to create a new database, or open an existing database (perhaps from an older version of Clooz).You can actually have multiple databases. You might start one for all your research with known ancestors and perhaps start another one for possible ancestors. You can now merge two Clooz databases together.

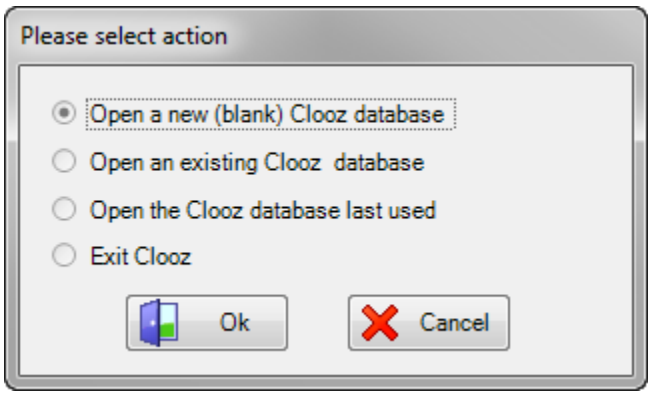


Figure 28 - Opening Selection Action Window

To create a new database:

1. Select *Open a new (blank) Clooz database* from the action screen (shown on the previous page). (You could also go to the File Menu and select *New Database*)
2. Click OK.
3. Once you have created your database, you will be taken to the main screen in Clooz, with the Clooz Explorer Bar on the left side of the screen and the People grid on the right side. You are off and running.

To upgrade a database from a previous version:

Upgrading from version 1.x of Clooz:

Please read the appendix to this manual on Converting from Earlier Clooz Databases first.

1. Select *Open an existing Clooz database* from the action screen (shown on the previous page), and click OK, or select *Open Database* from the File Menu.
2. A Windows dialog form will appear to select the file. Be sure select the .mdb extension for listing files from the drop down box in the lower right corner of the form.

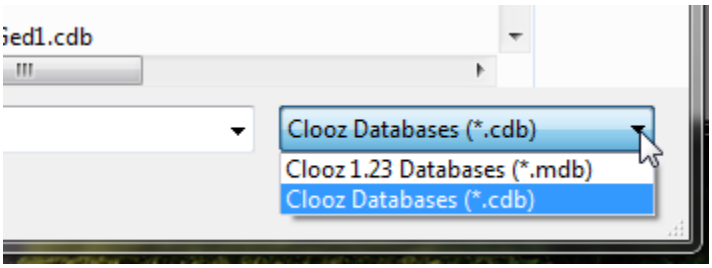


Figure 29 - Selecting the Proper Filename Extension

3. Locate the Clooz database file you want to upgrade. Select it, and then click OK.
4. You will then be asked if you want to upgrade your database. Select Yes.

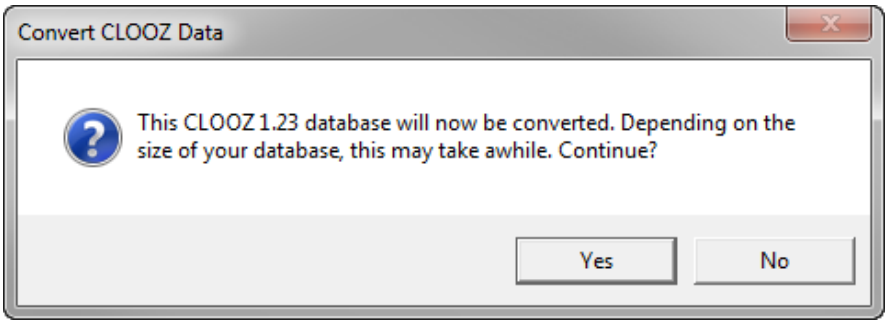


Figure 30 - Request to Upgrade Database

5. A window with a progress bar will appear as the upgrade takes place. If it is successfully completed, the following message will appear offering to display the upgrade log.

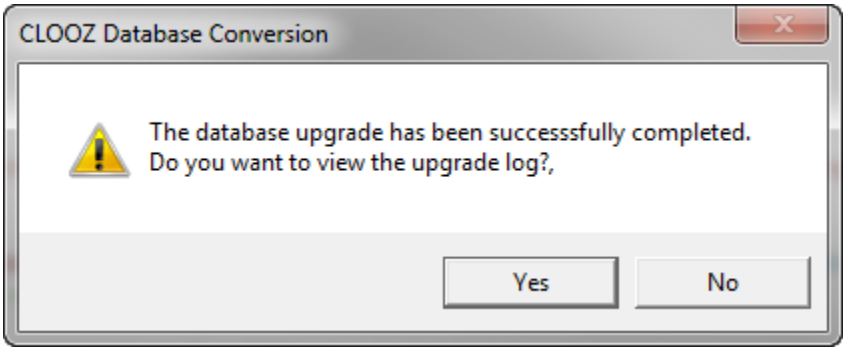


Figure 31 -1.x Database Upgrade Completed

6. You are now ready to use the database in version 3
7. If an error had occurred, a similar window would have appeared as above but stating the upgrade completed with errors, or with warnings. Warnings are usually associated with missing digital files, and can be fixed in version 3. Be sure to copy the warnings from the log for reference on which images to fix. Errors are more serious. You should contact Clooz support to resolve the issue before using a faulty database.

Upgrading from version 2.x of Clooz:

Before beginning, be sure you have both your .cdb and .fdb files for the database.

1. Select Open an existing Clooz database from the action screen (shown on the previous page), and click OK, or select Open Database from the File Menu.
2. A Windows dialog form will appear to select the file. Locate the Clooz database file you want to upgrade. Select it, and then click OK.
3. You will then be asked if you want to upgrade your database. Select Yes.

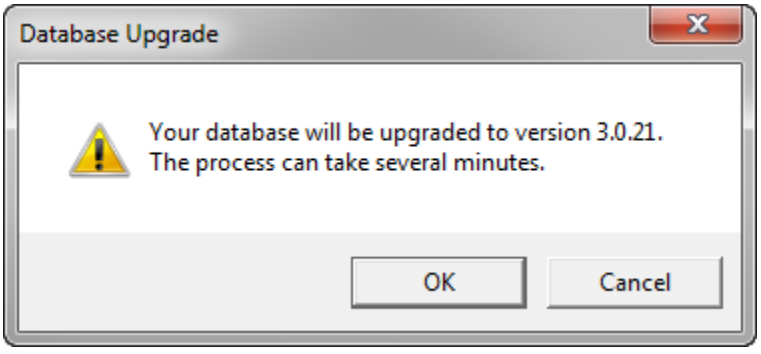


Figure 32 - 2.x Database Upgrade Request

4. A window with a progress bar will appear as the upgrade takes place. If it is successfully completed, the following message will appear offering to display the upgrade log.

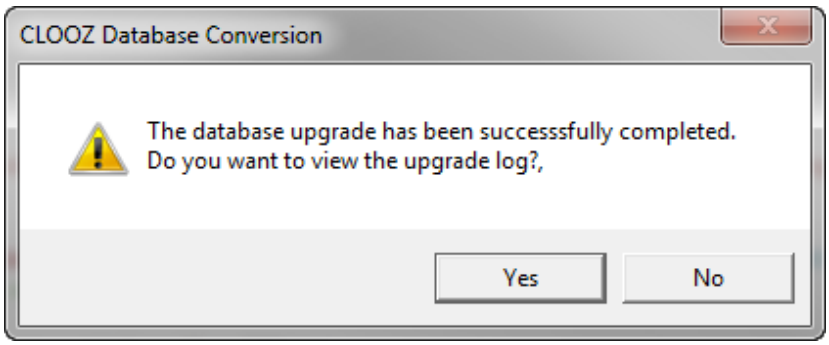


Figure 33 - Database Upgrade Completed Message

5. You are now ready to use the database in version 3.

If an error had occurred, a similar window would have appeared as above but stating the upgrade completed with errors, or with warnings. Warnings are usually associated with missing digital files, and can be fixed in version 3. Be sure to copy the warnings from the log for reference on which images to fix. Errors are more serious. You should contact Clooz support to resolve the issue before using a faulty database. Clooz will automatically return a database that fails to upgrade to its original state. Only successful upgrades of version 2.x files can be used in version 3.

Change databases

During data entry, you can change to a different database from the File menu.

1. Select File from the menu bar.
2. Select Open Database.
3. From the file selection window, find your database and double click on it and it will open for you. You may need to change folders to the folder where you have stored your other database.
4. Another way to change databases is to look in the list on the File menu above Exit. The last four databases that you have opened are listed there for your convenience. Simply select one of them and your database will open.

Close a database

1. Select File from the menu bar.
2. Select Close Database from the File menu.
3. The action screen shown previously will open on your screen and you'll be able to choose another action.

Merging Clooz databases

One of the significant new features for Clooz version 3 is the ability to merge one Clooz database into another. Both of the Clooz databases must already have been upgraded to version 3, or else the merge operation will reject your request.

To perform a merge:

1. In Clooz, open the Clooz database which you want to hold the combined set of data.
2. Click on the External File Links button in the Explorer Bar, and select: Merge data from another Clooz Database, or in the File Menu, hold the cursor over the Import/Merge Databases line and a list of options will appear to the right. Select Clooz Database.
3. A file selection window will appear for you to select an existing Clooz database to open. Select the file, and click Open.
4. The new Data Transfer Manager window will now appear.

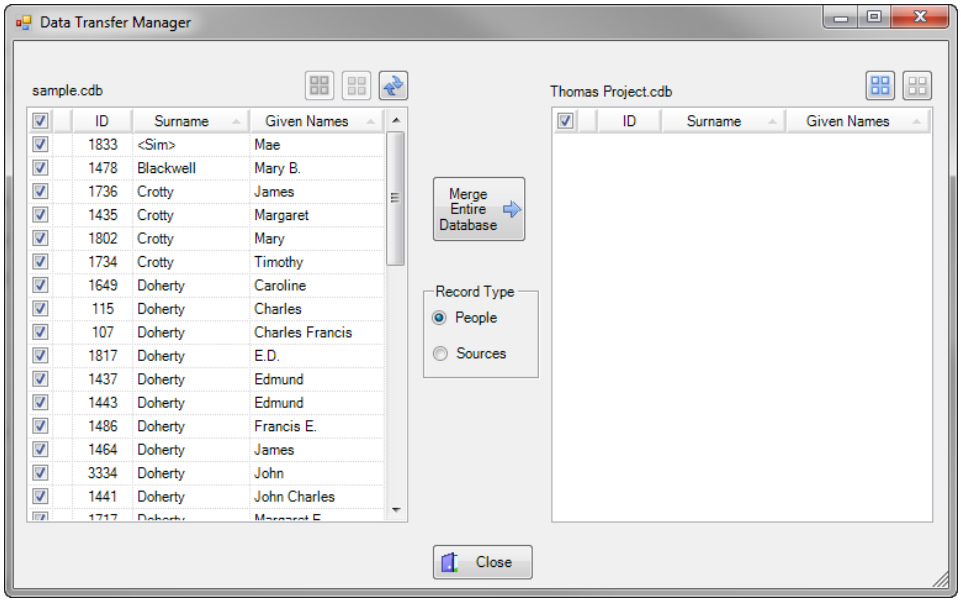


Figure 34 - Data Transfer Manager Ready for Merge

5. The right side is our destination database, which happens to be empty in this example. The source for merged data is on the left. All elements are selected for transfer. To initiate the merger, click on the Merge Entire Database button in the center of the window.

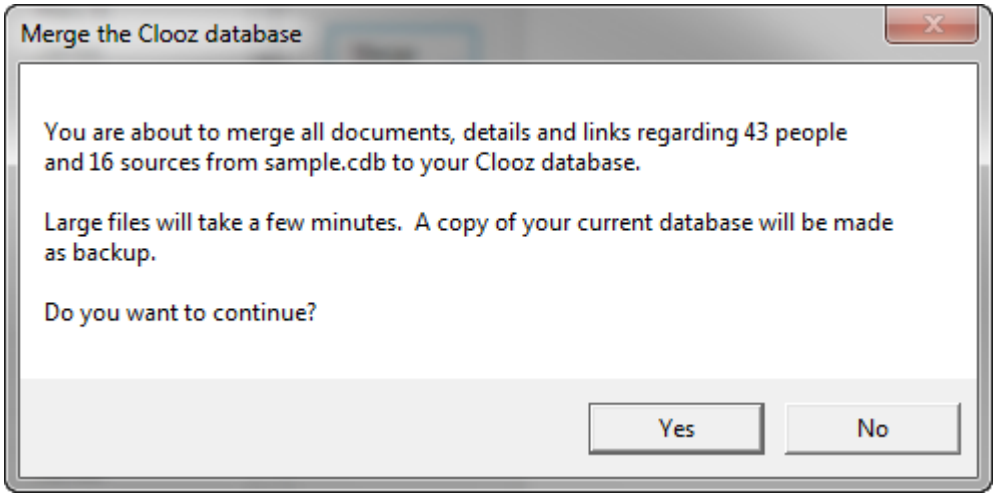


Figure 35 - Merge Verification Message

6. A message verifying your request is displayed. Click Yes to proceed.
7. Progress bars will appear at the top of the window to show progress. Large databases can take a number of minutes to complete.
8. Once the merge operation completes, a message will appear stating the merge operation is done, and gives you the opportunity to review the log file.
9. Press Close when ready and resume work with your database that now contains all the data from the other database as well.

Merging of Clooz databases does not permit selection of individual people or sources like the other import operations. All data from the source file are copied.

Database Maintenance

Archiving / Restoring

You should backup (archive) your databases on a regular basis. You have the ability to do so from within Clooz. From the Clooz menu bar under "File," select Archive Database. A screen titled "Enter name of archive file" will open, asking you to enter the name of the file to be archived in the File Name window. Type in the name you want to give to this archived database.

If you need to change the location where the backup will be stored, click on the down arrow on the Save In window and select a different drive or folder. Once you've named the file and changed the storage location, click Save to start the archiving process.

Archived files are stored as Zip files. If you need to Restore an archived file, first close any open databases, then select Restore Database from the File menu. A window will open asking you to select an existing archived file to restore. Look for your archived database, making sure you select one with a .zip extension. Clooz will restore your archived database. Since the archived files are stored as Zip files, you can also look at the contents of the Zip files using commercially available programs such as WinZip or WinRAR. You will still need Clooz to look at the data in your databases, but you can use these programs to ensure that your databases have been backed up properly.

Compacting

Compacting your database allows you to tidy up the data, eliminating any deleted references. This usually makes the database a little smaller. This is a housekeeping function that should be performed regularly. In Options on the Edit menu, you are given the choice to automatically Compact and Archive your databases. The default selection is for Compact to happen every time you close your database; Archive is not automatically selected for you. To change these options, go to Edit/Options on the Clooz Menu bar.

There are numerous reasons why the compacting process could fail. Do not be alarmed. Your data is safe, since the compaction is on a copy of your original file. Clooz automatically puts your original file back in place if an error occurs. There are settings in the Option menu to turn off reporting of the compacting errors. The popup message that appears on the screen during compaction will indicate at the very end (before disappearing) if the compaction was successful. It is only important that the compaction succeed occasionally to keep your database from becoming too large. Even that is not absolutely critical.

Locating Missing Media Files

When moving your entire Clooz database and attached media files to a new computer or even just reorganizing your current computer's data structure, the links in the Clooz database pointing to the various media file locations can become invalid. That is, the link no longer points to the correct file location. In Clooz version 3.3, a new tool was added to assist users in correcting lost file issues in their database. The *Media Location Tool* is located in the File Menu, under the Maintenance group.

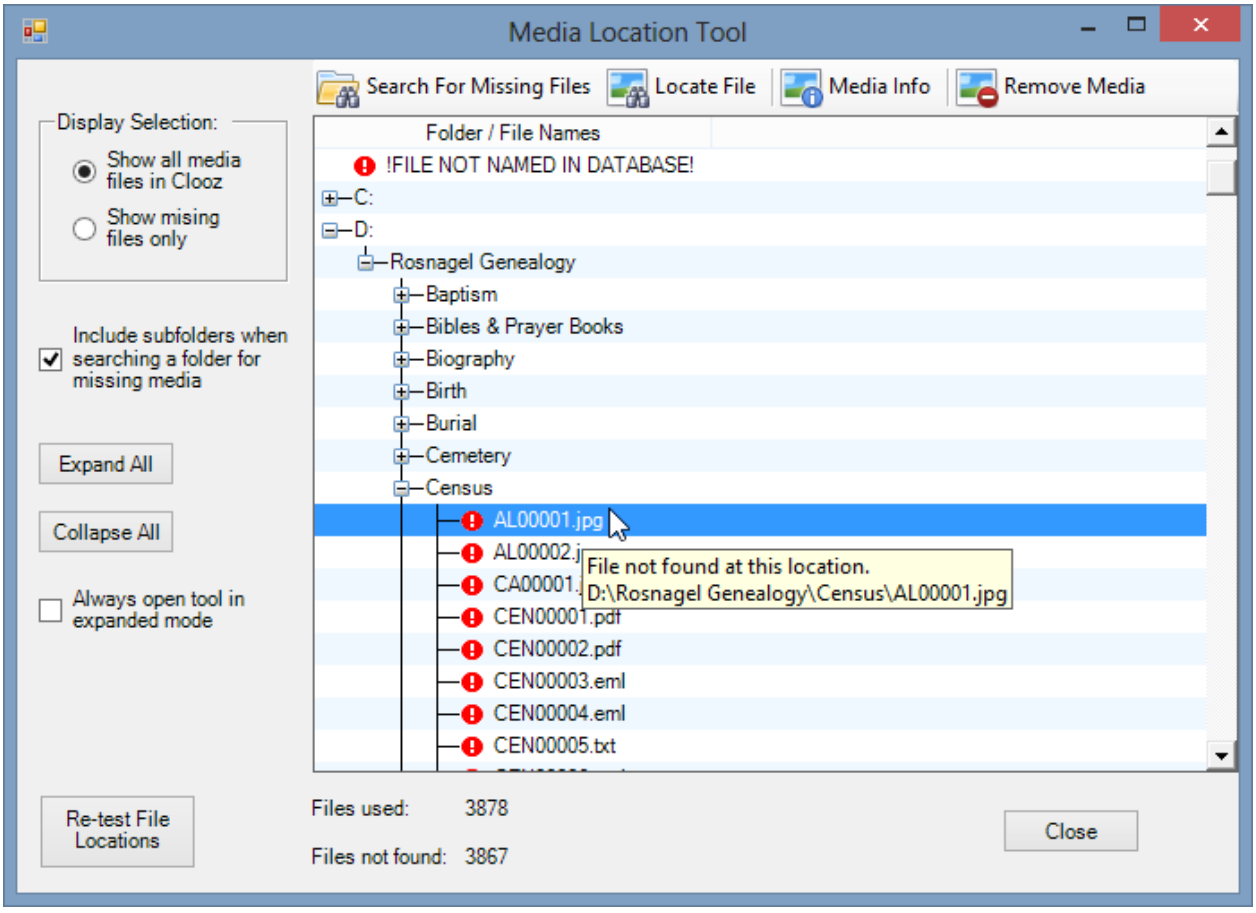


Figure 36 - Media Location Tool

The display will show all the folder locations Clooz has record of where the files are. When a file is missing, a small red icon appears by the name. In some cases, even the name of the file is missing, as shown in the Figure above. More information can be displayed about any of the files by selecting the file, and then pressing the *Media Info* button (or similar command in the context (right-click) menu). A form then appears to give you more clues as to what the file might be.

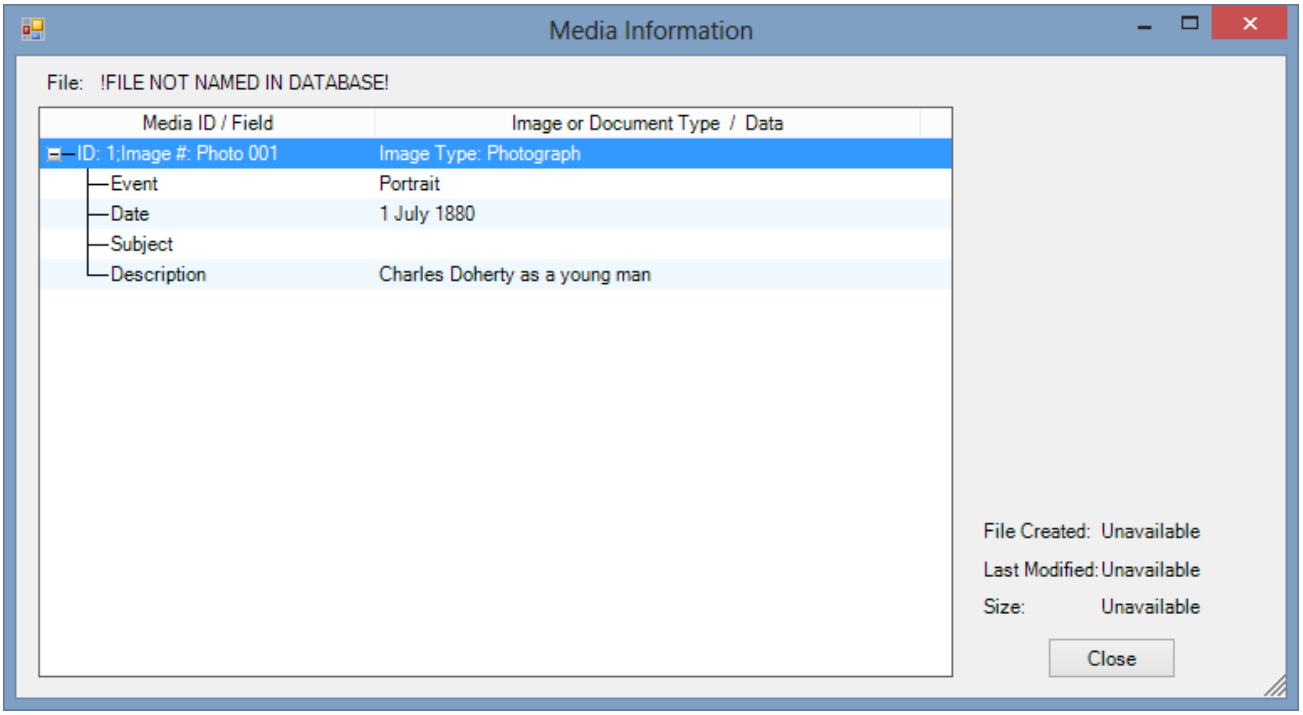


Figure 37 - More Information Form

The panel on the left side of the Media Location Tool form has some optional control features, such as whether you wish to see all the media references in the Clooz database, or only those that are currently missing.

The *Locate File*, *Media Info*, and *Remove Media* buttons that appear on the Media Location Tool's toolbar will only be enabled when a file is selected (highlighted) in the tree structure, since they each only apply to specific files. You can use the *Locate File* button to set the correct location of a single media item. Just select the file in the list, and then when the normal Windows Open File dialog appears, browse to the desired file and click it. You can even select a file that has a different name than what Clooz had a reference to (helpful when the name of the file has been changed).

The *Remove Media* button can be used to eliminate the reference in Clooz to that particular file (whether it is currently missing or not). If the file is not missing, the file itself is not deleted. Only the reference in Clooz to the file is deleted. After clicking this button, the entire list will refresh, and the file will no longer be listed.

When you want Clooz to assist in relocating files, click the *Search for Missing Files* button to search an entire folder for any of the files missing in the Clooz database, relocating as many of them it can match up to files in the folder you designate. When the search button is first clicked, a form will appear to allow you to select the folder you want to search in. If the optional "Include subfolders when searching a folder for missing files" checkbox is checked, any subfolders in the folder you selected will be included in the search (then subfolders within those folders, and so forth). Therefore, to get the broadest search, select a folder that is fairly high up in your hierarchy of folders retaining your media files, and turn this option on. You would not want to use this feature though if

you have a habit of giving different files the same name, and keeping them in different folders. Clooz will not recognize the difference between two files if they each have the same name.

When your database has thousands of media files, and if you chose a folder to search such as My Pictures that could have thousands of images in it (whether used in Clooz or not), the search process could become quite lengthy as Clooz attempts to match up all the media references. For that reason, a progress bar will appear at the bottom of the form while the search is ongoing. To abort the search, press the *Stop Search* button. The search will be stopped, but any matches that occurred thus far will be already saved in the database. So you could perform the same search later to find additional matches.

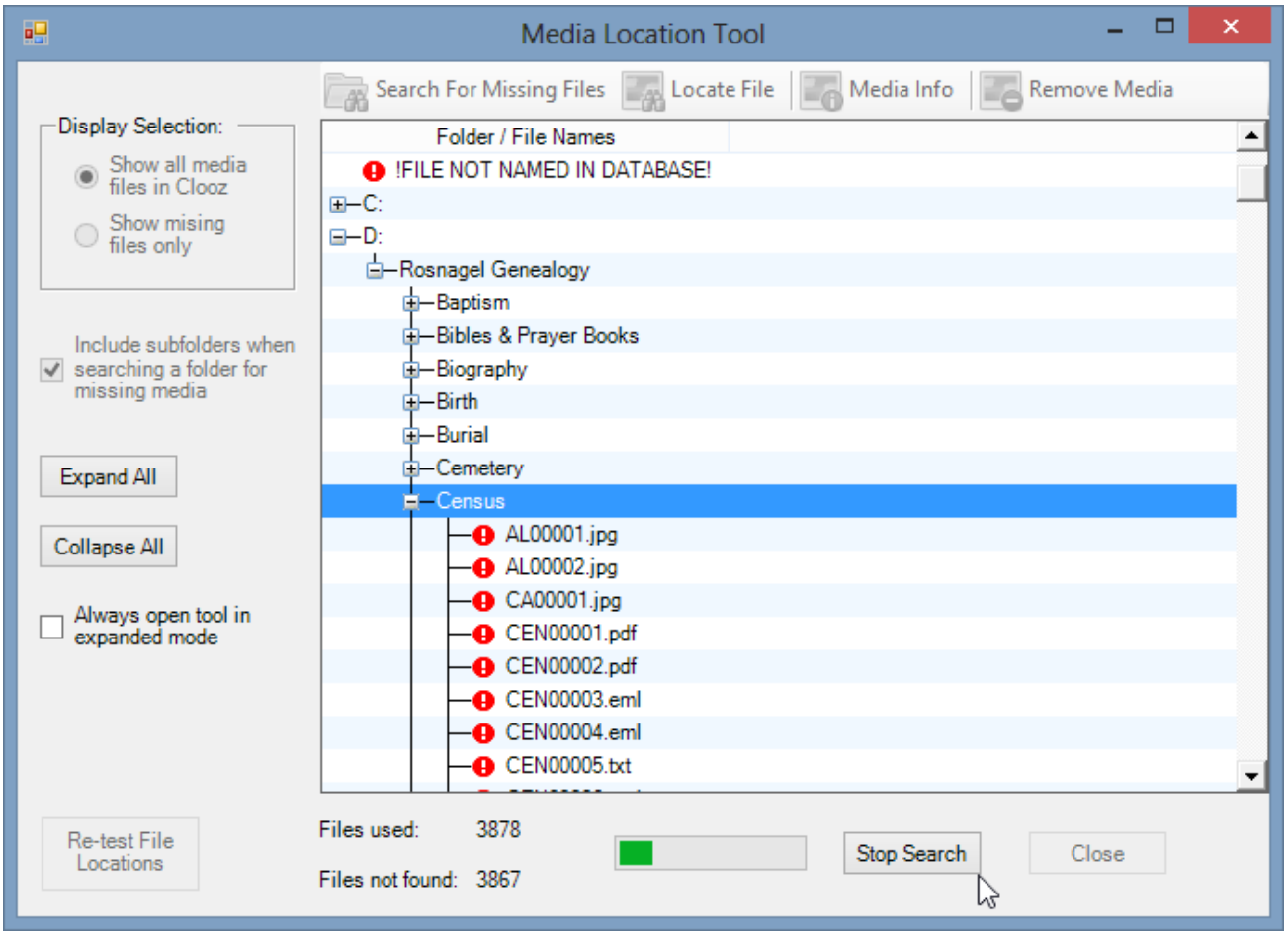


Figure 38 - Missing File Search in Progress

Resetting the List of "Most Recently Used" Files

In Clooz version 3.3, a tool to reset the contents of the "Most Recently User" files list was introduced. It resides in the Maintenance Group that is part of the File Menu. Click on the *Most Recently Used Files Tool*, and a form will appear that lists all of the current MRU files. Check the boxes for those you want to retain in the list, and then press the *Save Checked Items* button.

Using Clooz

Determine your strategy

Clooz version 3 is designed more than ever before to meet your needs without forcing you to do things in a prescribed order. Use it in a way that feels natural to you. At the same time, once you determine your objectives in using Clooz, it's a good idea for you to become familiar with the program features to allow you to work in the most effective manner. Let's examine a few examples of how different users would best use Clooz.

Case Study #1 – Data already in a lineage-linked software database

Joan is a new Clooz user who has been building her family tree using Family Tree Maker software for the last decade. She has gathered lots of data and has over a few thousand people in her family tree database. Much of the data (including censuses, vital records, immigration records, and church records) have been documented in Family Tree Maker as sources, and physical copies of the documents have been filed according to document type. Joan loves to search and find new information, more so than filling out computer screens of information, so she also has accumulated a pile of copies of documents from her more recent research that has not yet been 'processed' into her Family Tree Maker database.

Joan is intrigued by Clooz's document-based approach, but has serious concerns about retyping all of her document records into Clooz. She wonders how she might use Clooz.

Here's how:

Since Joan already has a substantial amount of research already done, with people in her Family Tree Maker database, her first step should be to import those people and sources into Clooz using a GEDCOM file (since Clooz only presently supports direct importing from current versions of Legacy Family Tree, RootsMagic, and The Master Genealogist).

Joan decides that many of her ancestral lines have been sufficiently researched, and does not want to take the time to detail them further in Clooz at this time. Maybe someday when she has time, because she ultimately does want to use Clooz as the focus of her document repository. While Clooz could easily help her locate files containing physical copies of the documents, she likes the idea of a paperless approach where images of her documents are always at her fingertips.

Dealing with her backlog of processing documents more recently found is Joan's top priority. She enters these into Clooz, and uses the new feature for letting Clooz create new people for each one contained in the document. Then she can begin to make the decisions on whether these are the same people as those in her tree, and merge them together. Joan's research techniques had matured over the years, and now she knew not to just throw people into her family tree without substantial analysis and proof. Once she considered it proven, she would enter the person in her family tree. Since Legacy Family Tree software is the only software Clooz exports individuals and sources to (version

3), she will use copy/paste techniques to transfer information back to Family Tree Maker to keep her family tree up to date.

Finally, Joan knew that some of her ancestral lines were only partially complete. So she decided to enter the document information for those people into Clooz to allow for more thorough reporting and analysis, being able to see all of the evidence available to her. She already knew for sure that the people named in the documents were ones in her tree, so she used the traditional Clooz approach of linking existing people to the documents she entered. This saved the step of having to merge people records later. She was amazed to discover, like many Clooz users over the past years have reported, that during the process of entering the document information into Clooz, it forced her to pay attention to the details contained in the document, and in fact identified additional clues regarding her ancestors. Maybe she wouldn't put off entering all her documents after all.

Case Study #2 – The Reformed Researcher

Frank has been gathering family tree information for a few years, and like Joan, uses lineage-linked software to create beautiful family tree charts. He doesn't have a whole lot of document files, but there are two boxes of stuff under the table beside his computer. He has collected GEDCOM files from all over, where ever he could find them, and diligently enters the source of the GEDCOMs in his database. Sources are important you know. One year, Frank attended a National Genealogical Society Family History Conference in a city near his home. While listening to Joan give a talk on using document evidence to prove family relationships, he was just overcome with the realization his prize family tree database was, frankly speaking, garbage.

It was time for Frank to rebuild his family tree with adequate evidence and documentation. He got a tweet from someone called @CloozJoe and heard about Clooz. The notion of document-based analysis of information made perfect sense to him, besides, Clooz imported GEDCOM files.

Frank decided he would use Clooz as his primary research tool:

He would start with a clean new Clooz database and dig out those two boxes of stuff under the table to see if there was in fact, anything useful. He did find a few birth records and immigration documents from his great grandparents. So Frank used his new scanner to make digital copies of the documents and setup a special folder directory to organize his digital file attachments into one general location on his computer. While looking at the list of files using the Windows Explorer program, he was able to simply drag and drop them into Clooz.

Frank was given a subscription to an online data provider, and after the little green leaf lit up, started doing searches for all sorts of documents and information. He was able to save digital copies of documents on his computer, and drag them into Clooz. He could even highlight the source citation information on the data provider's web page and drag it into Clooz. It didn't automatically get dissected and reformatted (wouldn't that be nice), but at least the information was captured. He could then easily fill out Clooz's form for the source by copy/pasting segments from what he had captured. Less typing is good he thought.

Using the documents Frank was entering, he entered the details related to each person listed in the document and let Clooz generate a new person record and link it to the document. After entering all the documents he could find that might relate to the family he was interested in, he printed himself a few reports and sat back to mull over what it all meant. Finally he was able to prove to himself that several of the documents related to the same person, so he merged those people together, and added a remark to the combined set of records detailing his logic. Joan would be proud he thought. He was now on the way to building a well-founded family tree.

Case Study #3 – The Professional

Elizabeth was a certified genealogist for many years. People would come to her with the most extremely difficult cases. One of her problem solving approaches was to do single surname studies in discrete geographic locations. She was proficient at using a spreadsheet program, but sometimes it just fell a bit short in terms of fully meeting her needs. She had an old copy of Clooz, but it was not the friendliest program to use. Then she heard the new version 3 was much easier to navigate, with more flexibility to do what you need. She gave it a try.

Elizabeth decided to integrate Clooz into her work in several ways:

She used Clooz to record census records of a particular surname she was researching in a region of Pennsylvania. She captured digital images and attached them to each of the documents she recorded. Elizabeth found that treating census enumeration districts as 'documents' in Clooz seemed to work the best for her. Clooz version 3 allowed her to attach multiple digital files (one for each page) to the same document. The whole surname study was put in a database of its own. She could always merge the Clooz databases later if there was reason to look at all the data together.

Elizabeth found that the reports Clooz generated could be exported into a variety of file types. The Adobe pdf files were good, and other formats would allow further reformatting using her suite of office applications. She could include the generated reports in the overall report to her customer.

Since Elizabeth had all sorts of projects, she ended up with various external lineage-linked databases. She ended up importing individual records from many of the databases. Clooz could identify which file a person's record came from and what their identification number was in the other database. This allowed her to be able to reference and locate people accurately between her various digital tools. She was convinced that Clooz belonged in her toolkit.

Case Study #4 – You!

How can Clooz meet your needs?

Planning your research

Planning your research and setting specific objectives is an important element of a well-structured family history research effort. Clooz provides a Research Log to assist you in this particular task.

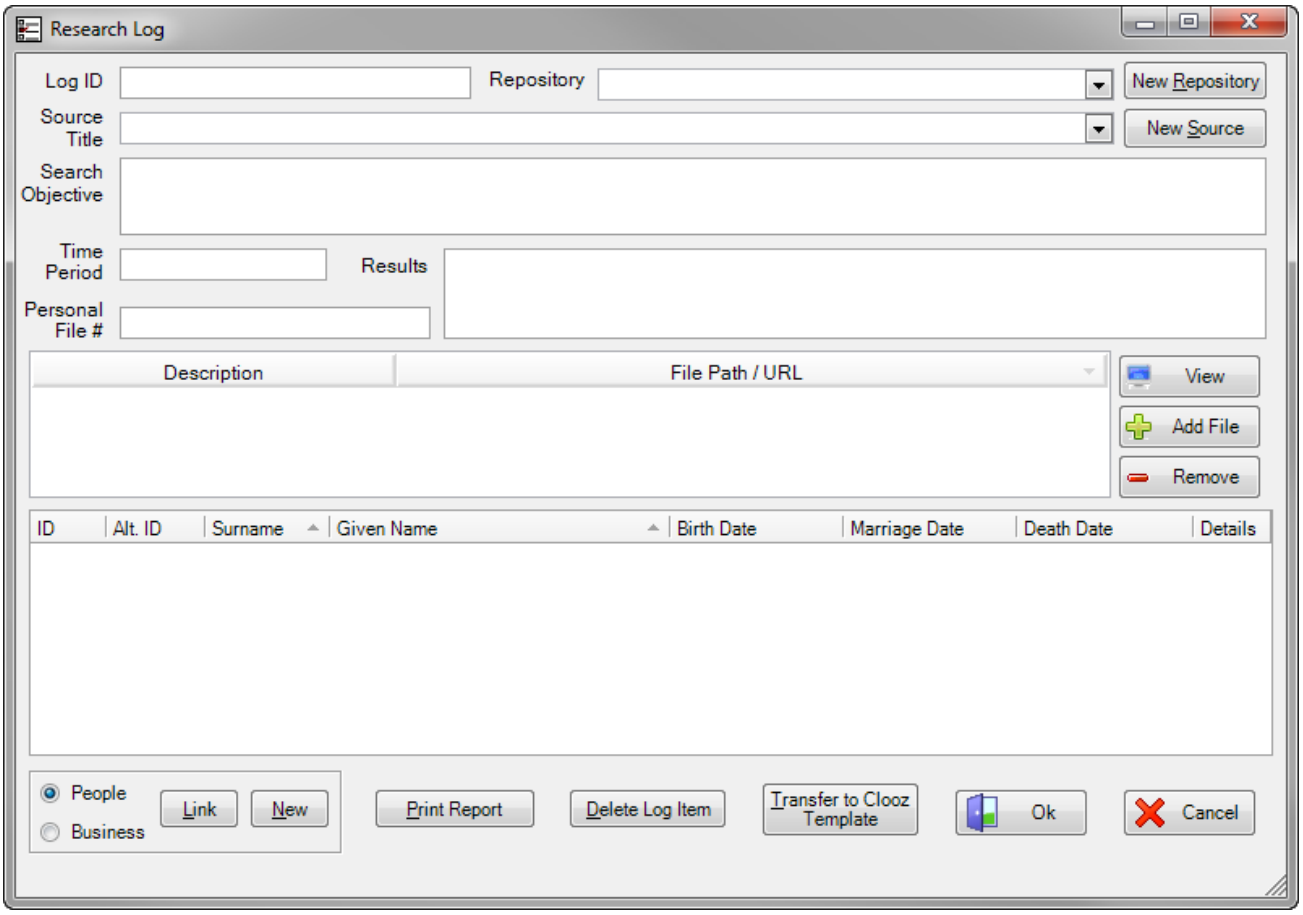


Figure 39 - Clooz Research Log Form

Research Log

What is a research log? A research log helps you keep track of all of the research that you are conducting, whether you have positive or negative results. It is important to keep track of the research you conduct so you don't repeat the same research multiple times. With so little time available for research, who needs to look for the same thing twice?

In Clooz, the research log has been taken one step further. If you use a laptop while you're researching, you can use the research log form to keep track of everything that you look at. You can record the results of your research right then, so you don't have to rely on your memory. If you make copies of items you find that pertain to your family, you can then easily convert the research logs to Clooz documents (using the appropriate template), with a minimum of additional work. So, keep track of everything you look at, and when you get a chance, enter a Personal File # into the

research log template if you have physical files and convert the research log to an appropriate Clooz document.

To enter information into a Research Log, take the following steps:

1. Select Research Log from the Clooz explorer bar.

2. Select Add Research Log from the Clooz explorer bar and a blank Research Log screen will appear.

3. Enter a Log ID number. This number can be anything you need it to be to keep track of research log entries.

   This number is not the same as Personal File #, which can be added later on the form. If you want to enter research logs in sequential order, you can look at the grid on the right side of the screen when you select the Research Log category on the explorer bar. There you'll be able to see all assigned Log ID numbers.

4. If you're looking at a Source that has not yet been entered in Clooz, click on the New Source button to add the Source. You won't be able to just type a Source Title in the Source Title window; you'll need to select New Source to enter the Source for the first time. When you click on the New Source button, you'll be asked to choose what type of source you're entering. For some types of documents, such as vital records, the best choice may be Certificate; for other records, the best choice might be Register. If you're unsure of the source type, check the Source section in this manual for suggestions. Once you select a source type, the appropriate Source screen will open. When you complete entering the Source information, click on the Exit button and you'll be taken back to the research log screen. The title of your source will appear in the Source Title window. Sources already selected on this form can be edited in the Source editing form by right-clicking on the source title and selecting *Edit*.

5. Enter your Search Objective. This can be something like the entry above, finding Eugene Pahnke's death record, or writing for a birth certificate. Be specific. The search objective shouldn't be too broad that you need to search multiple sources for the item, because you can only link one source to a research log. This may help you focus on exactly what it is you're looking for.

6. Enter the Time Period covered by this search objective.

7. Enter the Results of your research. This is a crucial part of the research log. Without the results, there's no point in keeping track of your research. Be sure to fill this section out. It may save you from doing duplicate research in the future.

8. Personal File #. This field can be skipped if you didn't find what you were looking for in the source. You can also skip it for now if you did find what you were looking for, but want to enter the document into Clooz at a later time. The field is designed for you to record the Personal File # that you want to assign to the document that you have found. If you enter the

research log information now and come back later to enter the document, you can fill in this field at that point. However, it is now an optional field in Clooz version 3.

9. The File Path/URL and associated description is there for you to record the digital location of the record you're entering, if there is a digital copy. For instance, if you have saved a copy of a document to your hard drive, then you would click on the Add File button to the right of the Digital File window. If the copy of the document you have is in graphic format (i.e. saved with an extension such as .JPG or .TIF), then it will be treated as a Picture. If you have a text transcription of the document (i.e. saved with a .TXT, .RTF, or .DOC or other extension), Clooz will treat it as a Document. Finally, if a URL for an Internet web site is entered in the File Path/URL cell directly, or dragged from an Internet browser program, it is recognized as a Website. The View button will have the system attempt to display the file using whatever software you have setup Windows to use as your default viewer for that file type. The Remove button will eliminate the link to the selected File Path/URL (the actual digital file is not deleted.)

10. In the lower left area of the form is a box with radio buttons for People and Business. This allows you to select whether the action of the Link and New buttons is to apply to a person or a business.

11. The Link and New buttons give you two options for linking a person (or business) to the log record.

    You can click the New button to have a new person or business generated by Clooz automatically based on the surname and given name entered on the research log details form that will appear.

    –OR-

    To add an existing person to your research log, click the Link button. The people (or business) selection screen will appear. Select a person from the list by clicking the check box in the far left column and click on the Link Selected button to link the selections to the underlying document. Alternately, you can double click on the selection within the list to perform the same operation. You can only link a person or business to a specific research log record once.

    You can find a name in your Clooz People list by scrolling to it or searching for it with the Find button in the Search tool bar. This Search tool bar functions the same with the Link list as it does on the main People grid.

    The research log input form and all other input forms in Clooz contain a Link button to add people (or businesses) to your records. You should link all people that you were either looking for or found as a result of this research.

    Click the Add Person button on the Link list Window to add a new person.

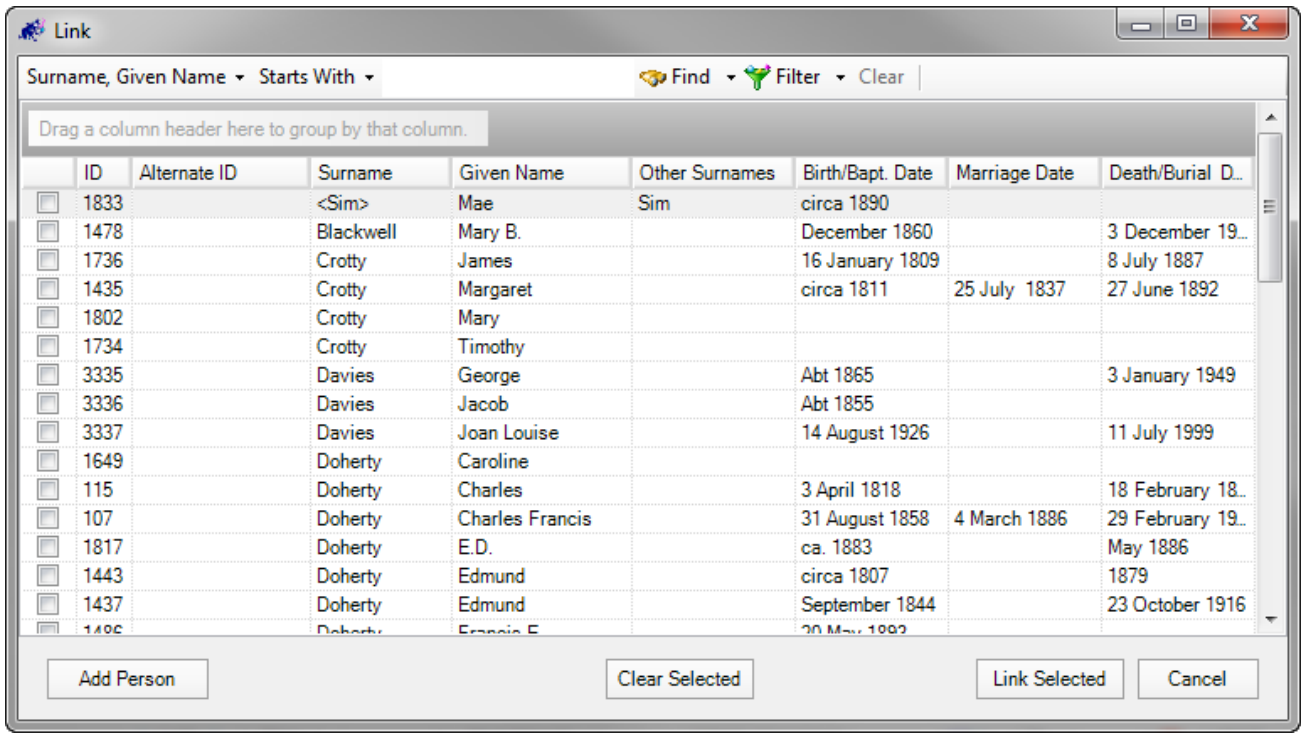


Figure 40 - Link List Window

12. For each person now linked to your Research Log record (or any other Clooz record form), double click on that person's name to enter their detailed information exactly.

13. Click on the Print Report button to generate a summary report of the Research Log record. A preview of the report will appear, with the further option to actually print it.

14. Click on the Delete Log Item button to delete the entire Research Log record, and all of the links associating people or businesses with it. Any details of the people or businesses entered under this Research Log record will be deleted; however, the people or businesses listed will not themselves be deleted. Use this carefully.

15. If you find an item associated with this Research Log entry, enter the Results and optionally add a Personal File # to that field, and then click on the Transfer to Clooz Template button. The following screen will pop up, allowing you to choose the type of Clooz document template appropriate for that document.

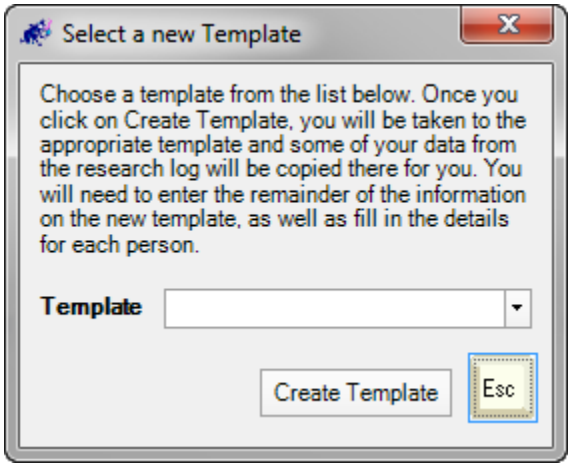


Figure 41 - Template Selection Window

16. Select the appropriate template and then click on Create Template. The template will open, with your Personal File #, source information, and linked people already there for you. You will need to complete the rest of the fields in the template, as well as filling in the details for each person linked.

People and Businesses

Nearly everything in Clooz is focused on documents in some way or another. As family history researchers, what brings us to use Clooz is ultimately finding more information about people, as well as businesses they may have been associated with. But from the Clooz perspective the main use for having people and businesses in the database as separate entities is to link them to documents, and the information contained in those documents. This is an important concept in understanding the Clooz process.

The following sections will review how you add, edit, and delete your people and business records, as well as how to connect the people in Clooz with people in your lineage-linked software program.

Adding People

There are two major data entry components to Clooz, one being all of the document records, and the other is the people linked to each of the records. You can record a person's information either before linking them to a document record, or at the same time as linking them (new for version 3).

People can be added in one of three ways:

Let Clooz add them automatically after you enter the document details related to that person.

Manually add them as a new person (separate from any document related activity).

Import them from another database or GEDCOM file.

Add people automatically from document details

In all of the Clooz document templates, in the lower left section of the screen there are controls for linking people and businesses to the document record. Within this group of controls, when the *New* button is clicked, Clooz will display the details form related to that type of document. This always includes the name of the person (or business when applicable). When the details form is saved, Clooz will create a new person record using the name provided on that form. The form will not exit unless a name is entered (unless the whole operation is cancelled). Other data fields that form a

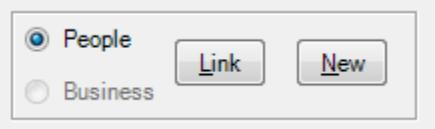


Figure 42 - Link Group Box

person's record in the database include birth, marriage, and death dates, can be added later by double clicking on the person in the main people grid (or by right-clicking on the person and selecting Edit)

This is the preferred way for adding people when you are not already sure the person in the document is the same as others in your database with the same name. In those cases, it is better to merge people's records later after you have studied the issue. It would also be the preferred method for adding people you know are not already in your database.

Manually adding new people

If you are going to add people one at a time, click on People on the explorer bar. This will open the People section of the explorer bar where you can choose the Add Person selection there. You will also notice that once you have people in Clooz, the bulk of your screen will be filled with a grid containing a list of the people in your database, including their ID, Alternate ID, Surname, Given Name, Other Surnames, Birth/Baptism date, Marriage date, and Death/Burial date.

To add a new person this way:

1. Click People on the explorer bar on the left.

2. Click on Add Person. The New Person screen opens, where you can add information about this person. Complete as many fields as possible and then select to either add another person or to exit the screen. If you decide you don't want to add this person, you can click on the Cancel button, which takes you back to the People grid, or you can use the Esc key on your keyboard. Don't worry about the other tabs on the New Person form yet. You will link this person to Censuses, Census Substitutes, Documents, Images, Buildings, and the Research Log later.

3. The Person ID field is an auto numbered field, meaning that Clooz automatically fills it in for you. It cannot be changed in Clooz.

4. Surname. Enter the birth name or the name you know him or her by. For example, enter females with their maiden names. If you don't know the maiden name of a female, you can leave this field blank. Married names are now entered elsewhere.

5. Given Name, Prefix Title, Suffix Title. These parts of the person's name are entered in their respective fields.

6. Married Names. The married surname of females, if known, should be entered into the Married Names field. On the People grid, it will show up in the Other Surnames column, along with any other surname spellings used in any of the documents they are linked to.

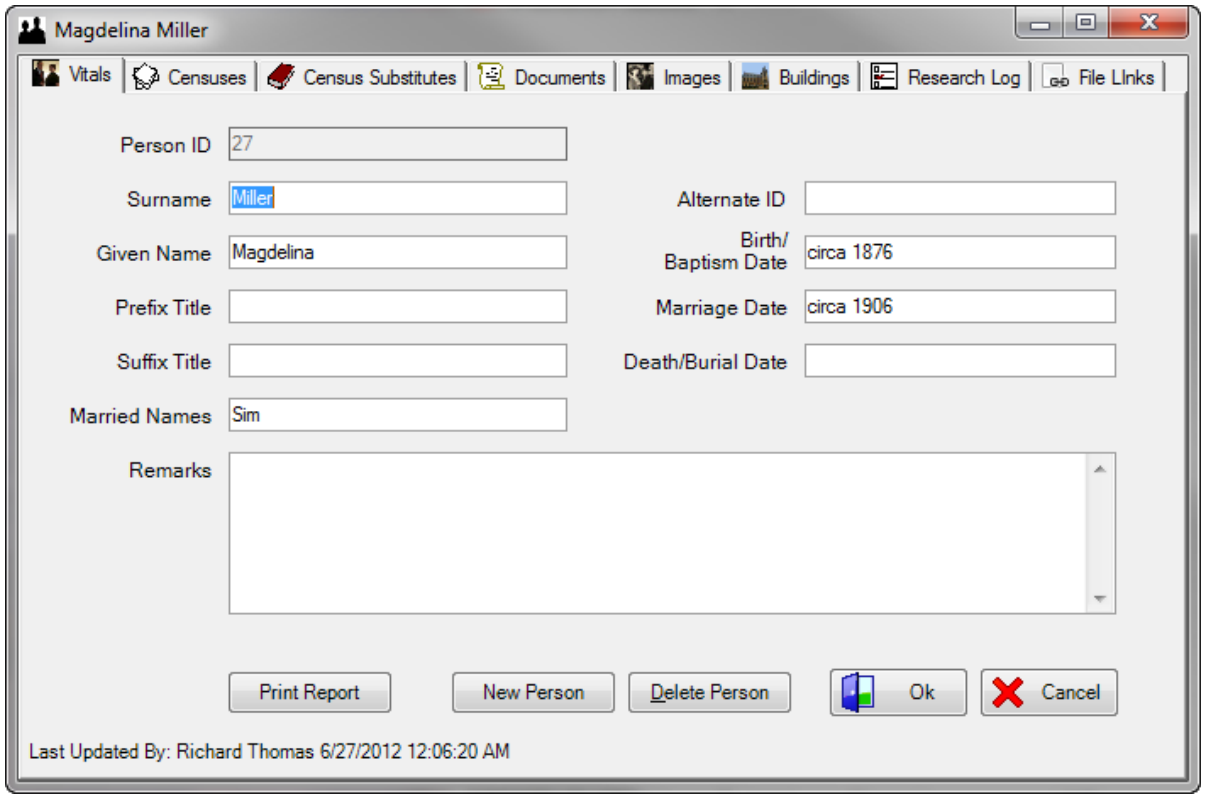


Figure 43 - Person Window

7. The Alternate ID is a field where you can enter your own number, words, or letters to further identify a person. For example, if a person in your files or in another genealogy program was given a different ID than that assigned by Clooz, you might enter that number as an Alternate ID number. You can also use the Alternate ID field to give yourself additional clues about the new person. You could enter a married name for a woman, or an occupation for someone to help you separate that person from someone else with a similar name.

8. Birth/baptism, marriage, and death/burial dates. Enter at least one of these, if known, to help identify an individual from others with the same name. Fill in a completely spelled out date if you wish, preferably in the day-month- year format, such as 10 September 1853. The fields allow for 50 characters.

9. Remarks. This field allows you to enter any additional information about the person that you feel is pertinent.

10. When you're through with data entry of people, click on the exit button to close the form.

To edit a person's data:

If you need to edit a person's entry, just double click on that person's name in your list of people. You will be taken back into that individual's form. You can also select *Edit Item* in the context menu (right-click) for that person.

To delete a person:

If you need to delete a person, find that person's name in the list of people and double click on it. The individual's form will open. Click on the Delete button on the form to delete the person's entry. You will be asked to confirm the deletion.

Import new people

Clooz 3 provides a whole new method for importing people (as well as sources and repositories) from other databases and GEDCOM files. Events cannot be imported, since Clooz is document-based. Clooz can now import data from the following sources:

Legacy Family Tree databases (version 6+)

RootsMagic databases (version 5+)

The Master Genealogist (version 8+)

GEDCOM files

In additional, entire Clooz databases can be merged (discussed earlier).

GEDCOM stands for GEnealogical Data COMmunications, and is the only "standard" that exists in the genealogical community for data exchange between programs. Not all GEDCOM exports are created equally, however, and Clooz attempts to adjust for known non-standard formats.

During the import setup process, you can now select a specific set of individuals to import, or all of the individuals in a database. It's all up to you.

To open the Data Transfer Manager, go to the File menu and select *Import/Merge Databases*, and a secondary menu will appear for you to select the desired type of file or database to import. Alternatively, you can click on the External File Links button in the Explorer Bar, and then select the desired type of file or database.

The first thing to appear will be a file selection window where you need to select the exact file to import from. Then click on OK to continue to the Data Transfer Manager window.

The Data Transfer Manager will first appear with People selected as the Record Type. If you want to import Sources/Repositories, you need to change the Record Type using the box in the middle of the window. Imports of People and Sources need to be performed separately.

With most other database types, the form will appear with both an Import and Export button. The Export button will be discussed later, although it works just like the Import, except copying data in the opposite direction. The external data source will appear on the left side of the window, and your Clooz list of people will appear on the right.

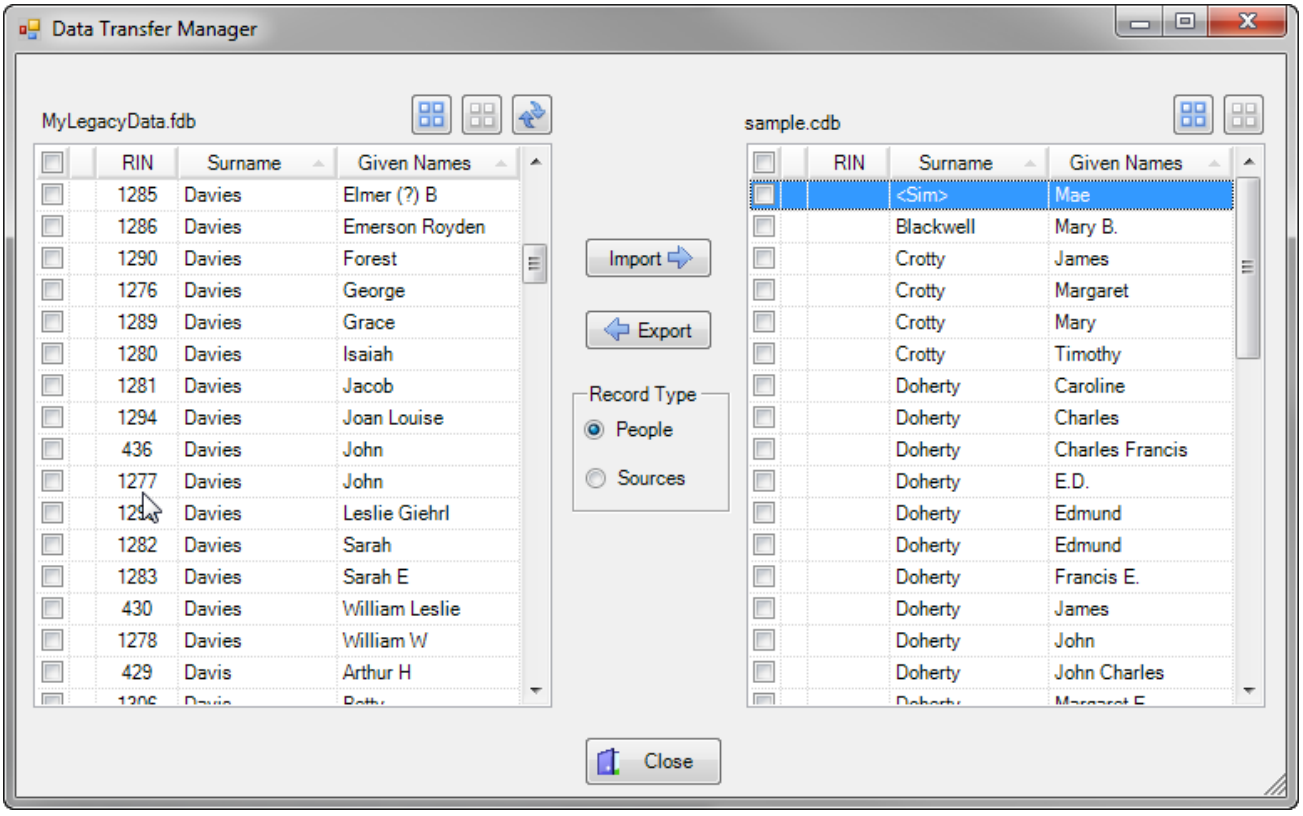


Figure 44 - Data Transfer Manager Window

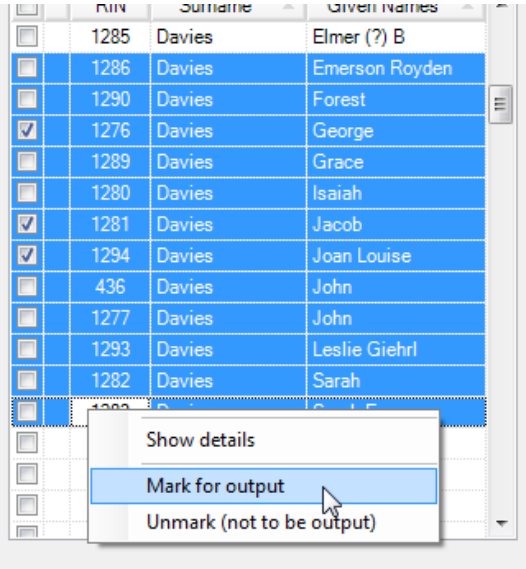


Figure 45 - Data Transfer Manager context menu

Your first task is to select the individuals to be imported. This can be accomplished by clicking on the small check boxes to the left of the RIN or ID number. The square buttons just above the list can be used to select all of the people at once, or clear all selections. You can also select groups of people by highlighting the lines (click on one name and then hold the SHIFT-key down while clicking another will select everyone in between the two), the right-click to bring up the context menu and click on *Mark for output*. All of the highlighted row will then show check marks.

When you are satisfied you have selected the people you want to import, click on the Import button. A message box will appear for you to confirm the action.

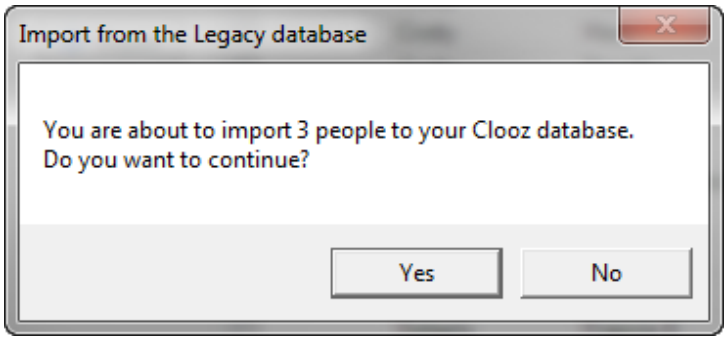


Figure 46 - Import Verification Message

Once the import is complete, the imported people will appear in the Clooz list on the right side, and reflect their RIN/ID from the other database. A small icon appears to identify which type of database the RIN/ID came from.

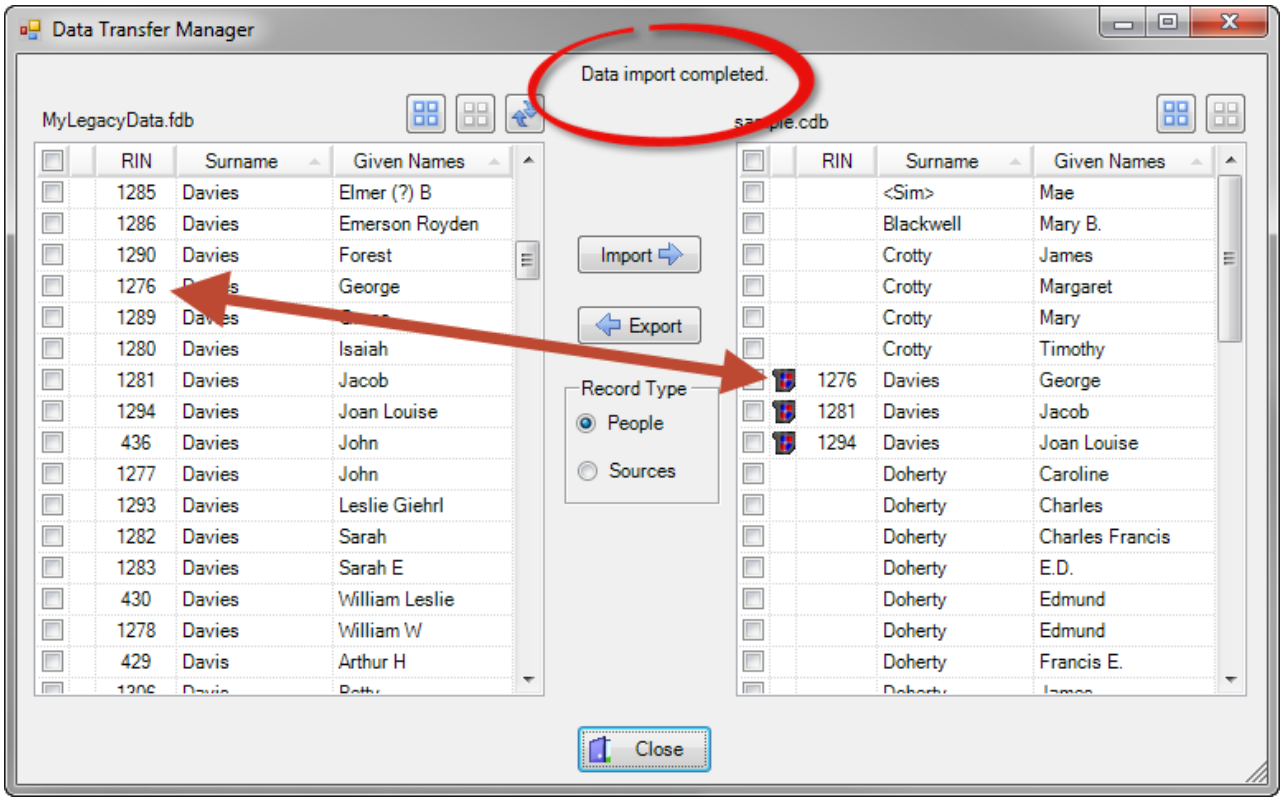


Figure 47 - Import Results

Adding new businesses

To add a new business, click on *Businesses* on the explorer bar. This will open the Business section of the explorer bar where you can choose the Add Business selection there. You will also notice that once you have businesses in Clooz, the bulk of your screen will be filled with a grid containing a list of the businesses in your database, including their ID, Alternate ID, Business/Organization Name, Owner Name, Date Opened, and Date Closed.

To add a new business:

1. Click Businesses on the explorer bar on the left.

2. Click on Add Business. The New Business screen opens, where you can add information about this business.

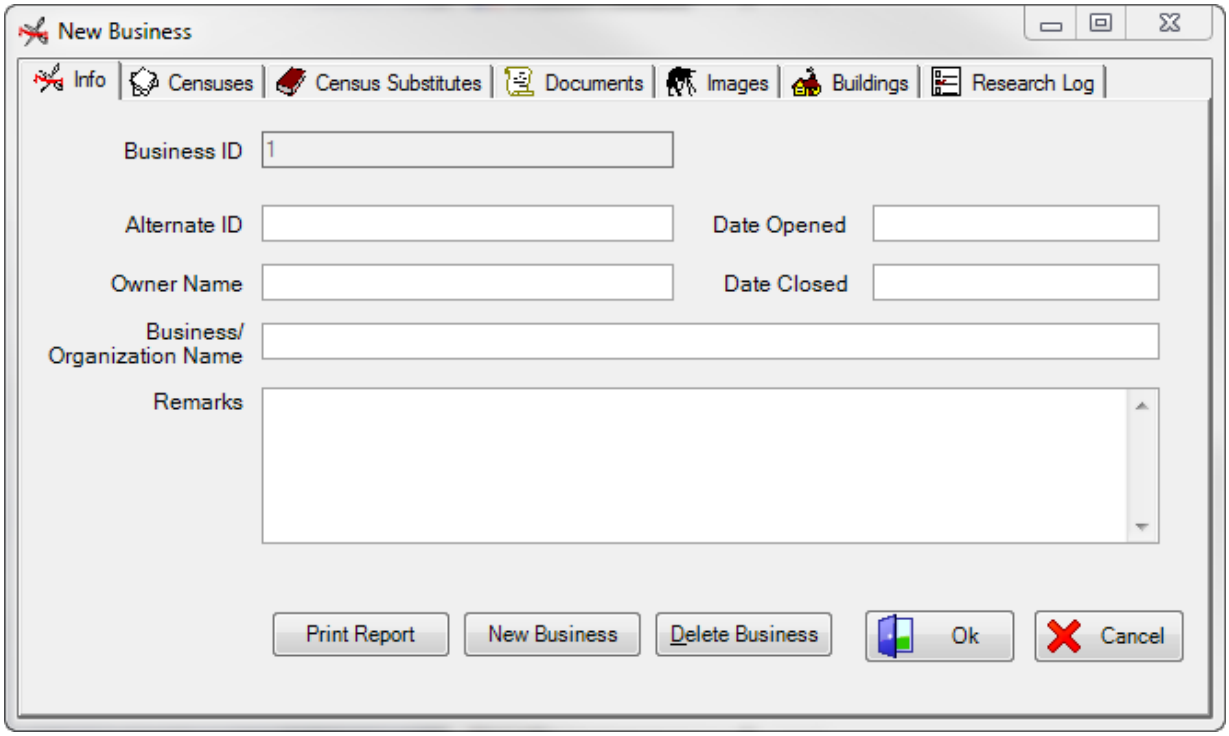


Figure 48 - Business Details Window

3. Complete as many fields as possible and then select to either add another business or to exit the screen. Use the Ok button (with the door on it) to exit. If you decide you don't want to add this business, you can click on the Cancel button to cancel your entry and take you back to the Business grid, or you can use the Esc key on your keyboard. Don't worry about the other tabs on the New Business form yet. You will link this business to Censuses, Census Substitutes, Documents, Images, Buildings, and the Research Log later.

4. The Business ID field is an auto number field, meaning that Clooz automatically fills it in for you. It cannot be changed in Clooz.

5. The Alternate ID is a field where you can enter your own number, words, or letters to further identify a business. This field is yours to use as you need to.

6. Owner Name. Enter the name of the primary owner of the business.

7. Business/Organization Name. Enter the name of the business or organization.

8. Date Opened and Date Closed. Enter what you know about the business' opening and closing dates. Fill in a completely spelled out date if you wish, preferably in the day-month- year format, such as 10 September 1853. The fields allow for 50 characters.

9. Remarks. This field allows you to enter any additional information about the business that you feel is pertinent.

When you're through with data entry of businesses, click on the exit button to close the form.

Edit businesses

If you need to edit a business' entry, just double click on that business' name in your list of businesses. You will be taken back into that business' form. You can also open the business form from the Business grid's context menu (right-click).

Delete businesses

If you need to delete a business, find that business' name in the list of businesses and double click on it. The business' form will open. Click on the Delete button on the form to delete the business' entry. You will be asked to confirm the deletion.

Linking People in Clooz to other Programs

Clooz 3 implemented a number of new features for maintaining the original identification number (RIN in Legacy) used with persons appearing in other databases. However, note that not all lineage-linked software programs make these numbers visible to users; some versions of Family Tree Maker for instance, hide these numbers. You may need to explore the program's option settings to see how to make the record numbers visible. The programs Clooz does acquire data from directly all do use such numbering. So this may or may not be useful to you depending on the other software you use.

There are three places in Clooz where you can see what the lineage-linked software program's database identification number was for a particular person in your Clooz data:

In the Data Transfer Manager when opened for the file you imported the data from, in the External Links tab of the People detail window, and in the Document Export function (described later in this document).

In both case, the numbers appear with icons representing the particular program the ID is referring. This is to avoid confusing them with Clooz's internal IDs. The Data Transfer Manager also has some special features related to these numbers. When the list is displayed, the numbers are verified against the numbers in the other program's database. If the person was deleted from the other program, the number will disappear at this point in Clooz. If the other program's numbers were reordered in some way, Clooz will attempt to use some hidden identification values the other programs usually have to update itself to the new numbers shown to users.

Finally, the Data Transfer Manager allows you to edit the numbers on the Clooz side (right side) so that you can manually record what ID value should be tracked when the person in Clooz was not originally imported from that other database. A cell will go into edit mode when you click on it.

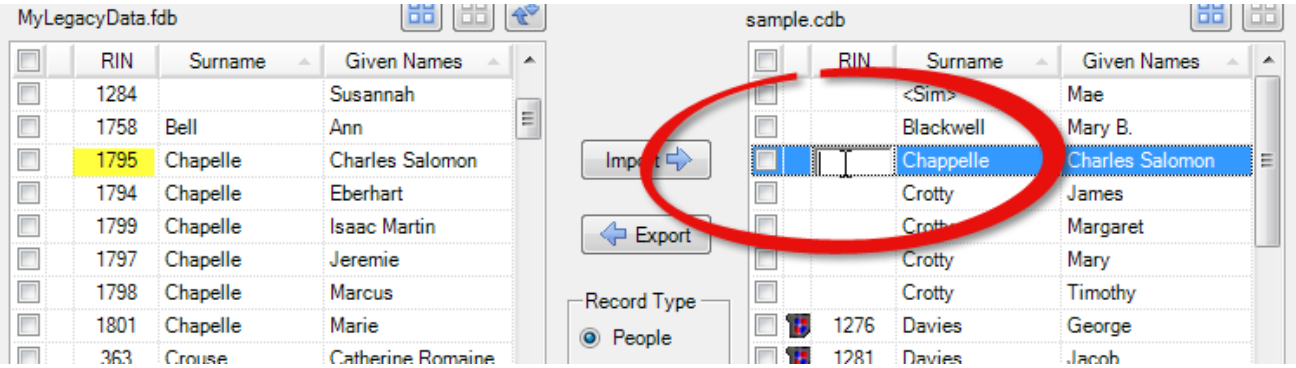


Figure 49 - Edit of RIN in Data Transfer Manager

The identification number for our person of interest, Charles Salomon Chapelle, has been highlighted in yellow in Figure 49 for clarity. This is the number we want to track, so you would enter it into the RIN field on the Clooz side. Once you press ENTER or click on another row, the linkage is established (note the icon now appears in Figure 50, below).

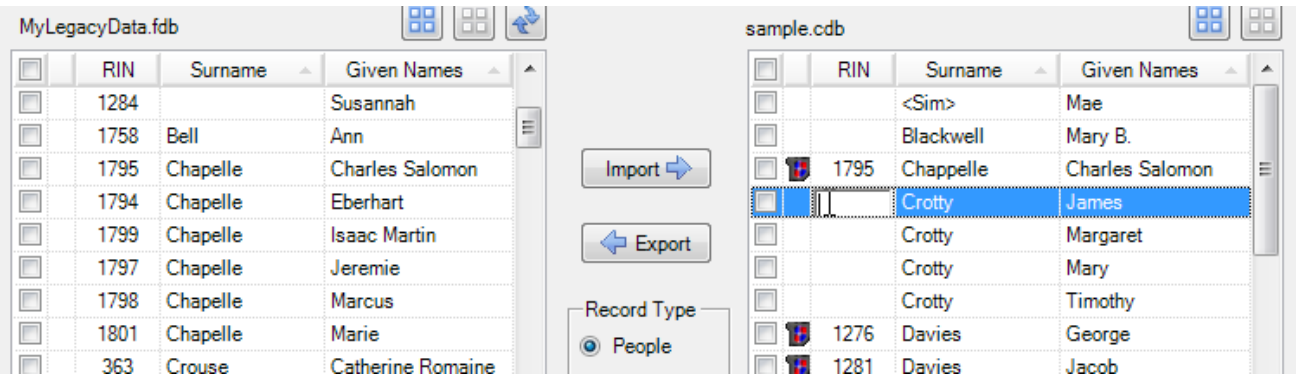


Figure 50 - RIN Edit Completed

Once you enter this number, Clooz will maintain it with the same consistency checks each time you open the Data Transfer Manager window.

An easy way to open the Data Transfer Manager with files you have already imported data from is to click the External File Link button on the Explorer Bar. When you do, the main grid will show a list of the files you have imported from. Double click a particular file to open it in the Data Transfer Manager. Note that Clooz tells you how many people you have linked from this file.

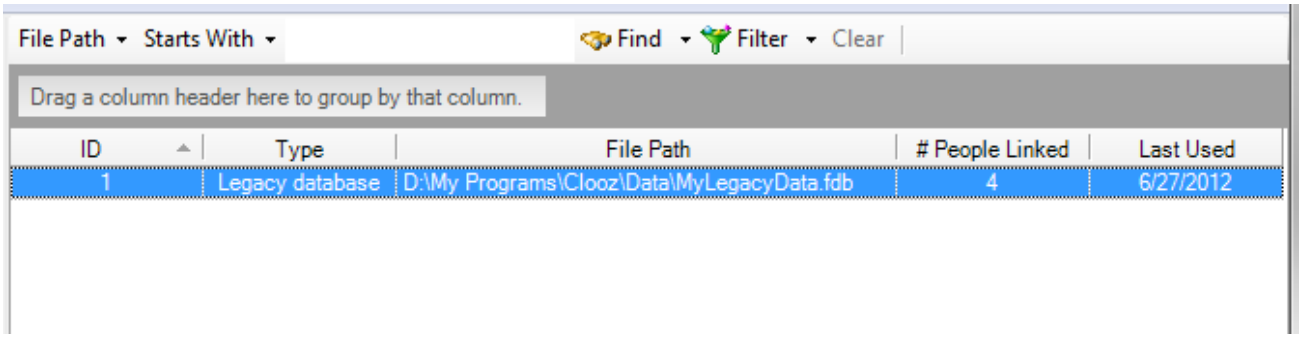


Figure 51 - External File Links Grid

As mentioned earlier, the other way you can view identification numbers related to other databases is in the File Links tab of the People details window.

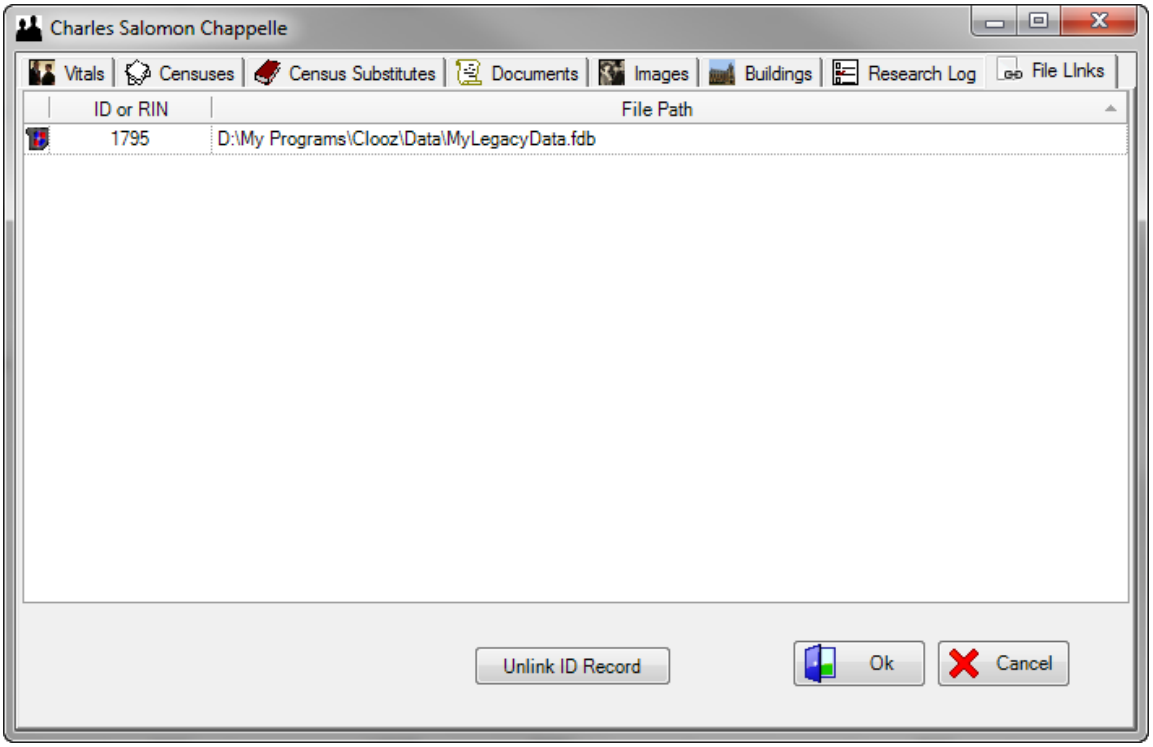


Figure 52 - File Links tab in People Details

Charles Salomon Chappelle's file links now show that he is RIN 1795 in our Legacy file, as we had entered. Click the *Unlink ID Record* button at the bottom of the window to delete links.

Transferring Links from one External Program to Another

Over time, it may become necessary to switch from one genealogy program to another, or to move a portion of your family tree to a new file even using the same external program. For example, The

Master Genealogist users may be switching to RootsMagic or Legacy Family Tree since development support for The Master Genealogist has been terminated. Clooz users who have invested a substantial amount of time in building their Clooz database and linking it to the people and sources in The Master Genealogist database would want to apply the same links to their new family tree database. To support this, Clooz has a special utility for synchronizing the links it has with two or more external databases. This is a **very powerful** capability. **Be sure to meticulously observe the cautions posted** in this section, and in the program windows associated with the feature.

Users who decide to perform this synchronization must understand it is an advanced capability, requiring user thought and preparation, as well as a thorough understanding of the system of Record Identification Numbers in use for EACH program. It is extremely important to recognize that the proper time to use this tool is only when there are matching ID values in the two external files.

In order to be able to duplicate the same links between Clooz and an external file, you must create the new family tree file in such a way as to preserve the Record Identification Numbers (RINs), or one of several other identification numbers (a user reference number, Ancestral File Number, or FamilySearch ID). Not every external file supports all of these options. For example, when transferring from The Master Genealogist or GEDCOM files, the only option for synchronization is using the RINs. Both Legacy and RootsMagic support the full set.

VERY IMPORTANT! Remember that your Clooz file is the central player in this synchronization process. In the instructions that follow, the external file you previously linked with Clooz is referred to as the Reference File. The external file that you wish to apply these same links to is referred to as the Target File. **Always backup your Clooz database before proceeding.**

The synchronization (or transfer) process to a new database begins with your Clooz file. Click on the *External File Links* button in the Explorer Bar (left side of screen) to display the current list of external files you have previously linked to Clooz. Right click on the file you want to use as the reference file (Clooz has links to this file). The familiar pop-up menu will display, but the new Transfer Synchronization menu item will appear as the last line item, as shown in the following figure. Click on the Transfer Synchronization option.

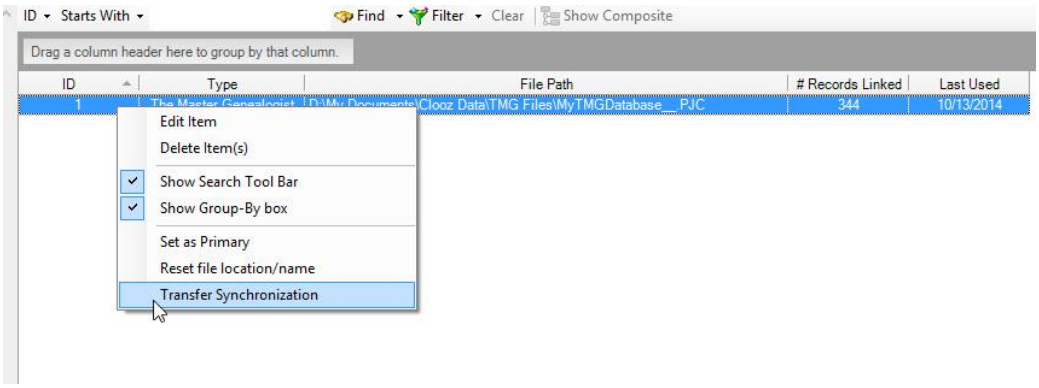


Figure 53 - External Files Context Menu

The Synchronization Transfer Tool form will now appear allowing you to setup the transfer operation.

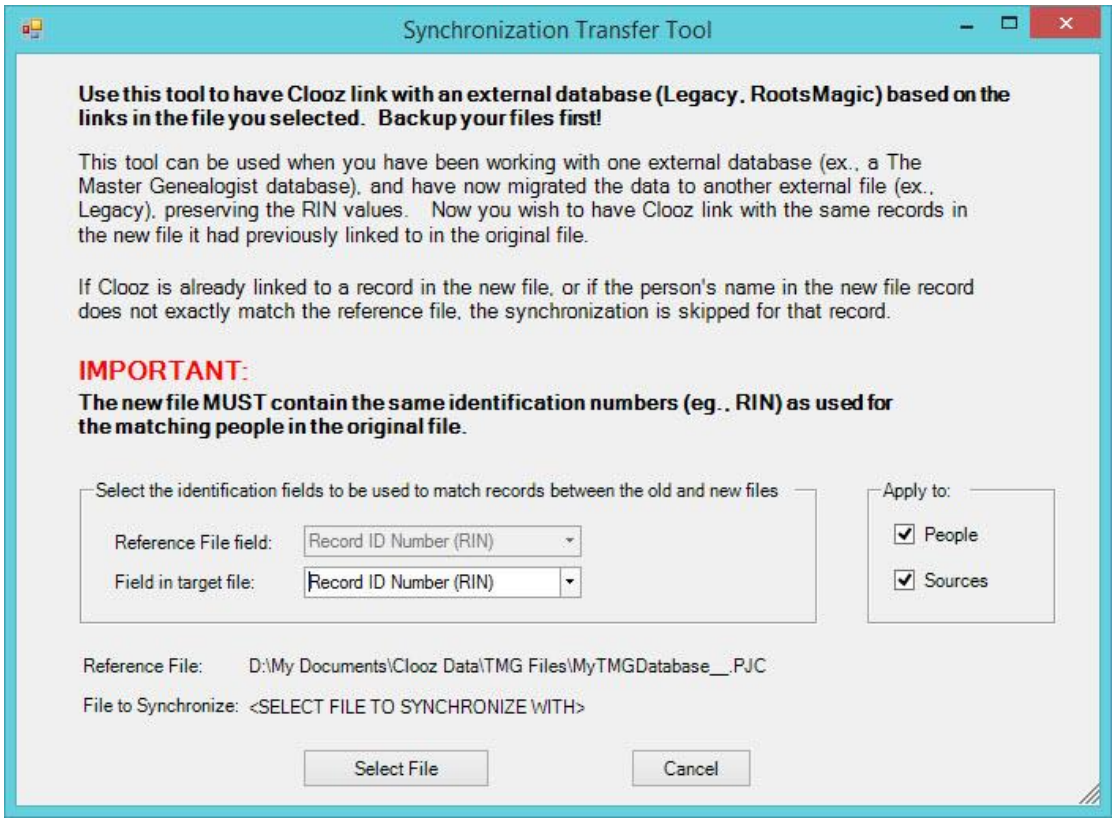


Figure 54 - Synchronization Transfer Tool

The next step is to select the identification fields to be used in matching records in the reference file to those in the target file. **Be sure to double check your designations of the Reference and Target files.** When there are multiple options, open up the drop down box to select the appropriate field. In the preceding figure, the Reference File options are grayed out, since the RIN field is the only possible selection for a The Master Genealogist database. However, that does not necessarily mean the target file must also be the RIN field. The field selection for the target file needs to say where the RIN values from the reference file ended up in the target file.

If a GEDCOM file was exported from The Master Genealogist, with the option set to include the ID numbers, and then imported into a new (blank) Legacy file, the RINs will continue to appear as RINs. However, if The Master Genealogist data was directly imported into RootsMagic (GEDCOM was not used), the original RINs will now appear as reference numbers in RootsMagic, so the User/Reference Number would be the appropriate field to select. It is beyond the scope of this document to thoroughly describe how each of these various programs work. It is up to you to read their documentation on importing and exporting data to gain a firm understanding of how the data are handled.

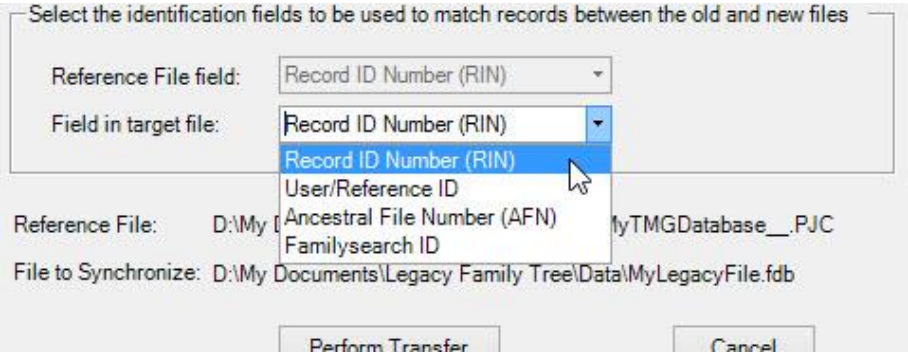


Figure 55 - Identification Number Selection

The ability to select any combination of fields to be used in the transfer opens up all sorts of possibilities for using this tool beyond the case where you are moving to new family tree software. While building your family tree files, if you had entered a User Reference ID for the people in both files, you can transfer the links made with Clooz from one of those files to the other. As described earlier, the fields used in both the Reference and target files do not have to be the same type of identification. They only need to contain the same value (such as the User Reference ID in one external file actually being RIN values that match the RIN values in another file). Likewise, both the Reference and target databases can be of the same type of external program (transferring the links in Clooz from the reference Legacy file to a target Legacy file).

All of these details can be quite confusing. Our recommendation is that you first open the two external databases at the same time in their respective programs (such as in The Master Genealogist and Legacy) to verify the identification numbers you believe should match actually do match. If the ID numbers match the wrong people, then the synchronization tool is not applicable to this particular situation.

As previously emphasized, be sure to make a backup of your Clooz database before attempting any transfers. In that way, you can always go back if you selected the wrong fields and start over (after restoring Clooz using the backup you made). **The only file affected during one of these transfer operations is the Clooz database.** The external files are not modified. In fact, if this is the first time you are linking Clooz to a particular external file, and the result was not as you expected, you can simply delete that file from the external file links list and Clooz will then delete all links it has to that file.

The next step is to indicate what type of links you want to transfer. The options are to transfer the links to people, and/or the links to sources (see next Figure).

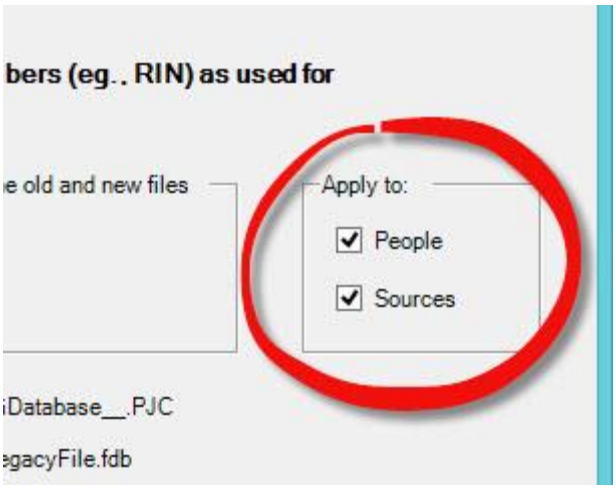


Figure 56 - Apply Options with Transfers

The last preparatory step is to select the target file (the file you are trying to apply the links to). Click on the *Select File* button (see Figure 54) to open a file selection dialog box. Select the appropriate file, and click *Open*.

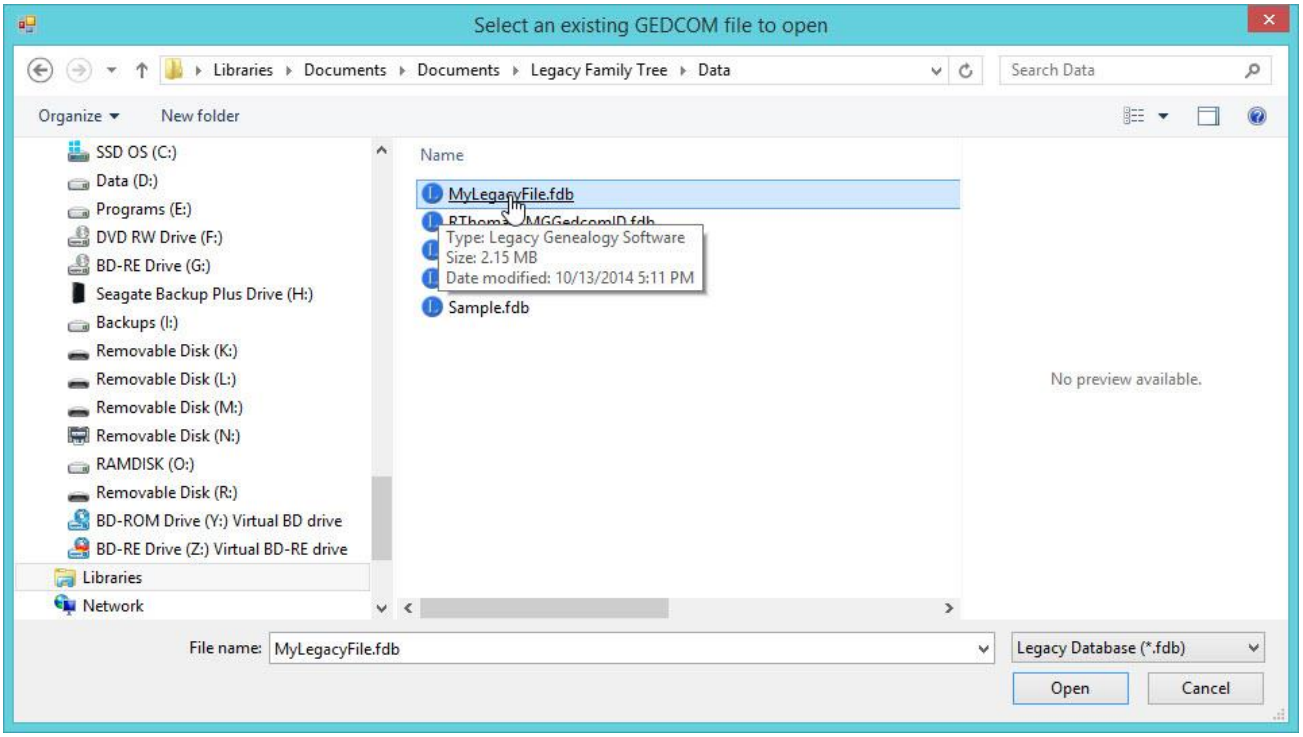


Figure 57 - Target File Selection

The file paths for both the reference and target files should now be displayed at the bottom of the Synchronization Transfer Tool.

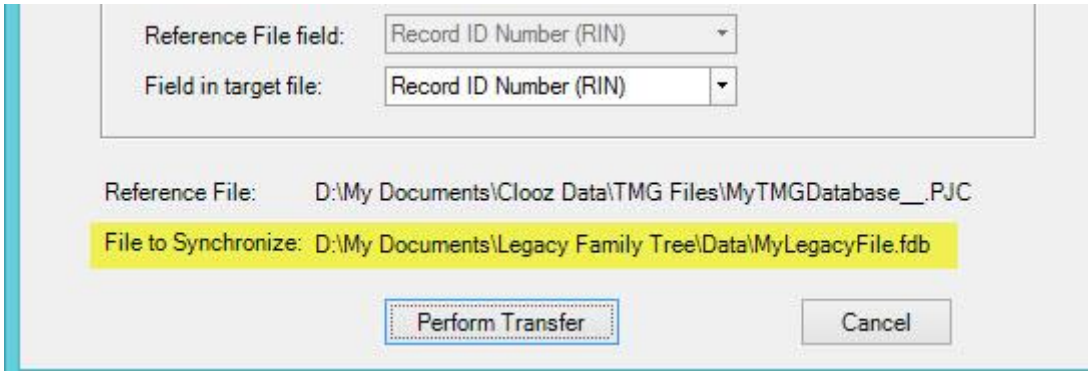


Figure 58 - File Path Display

Now click on the *Perform Transfer* button to begin the transfer process.

If you are attempting to apply a set of links where the identification numbers in the target file do not properly match those from the reference file, you will likely see pop-up alerts stating that the name of the person in the target file does not match that in the reference file. Unless you are sure it is in fact the same person (with some minor spelling difference), you should Cancel the operation (clicking the Cancel button) and attempt to figure out what is not like you expected. Cancelling, however, does not undo any changes already made in the process.

In the case of linking Clooz sources to those in the target file, a check is made of the source label, the source title, and source author (if it is included in the Clooz source). If these do not match exactly, no link will be established from Clooz to that source in the external file. If there are multiple sources in the target file matching the source in Clooz, a warning message will pop up.

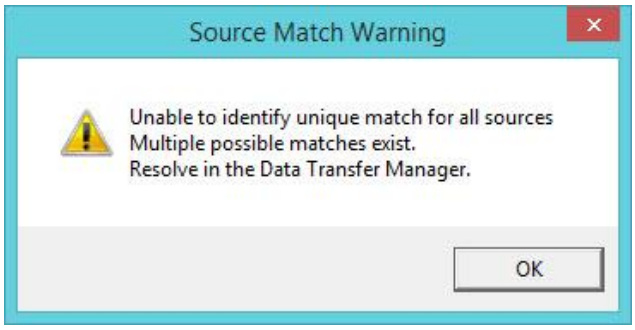


Figure 59 - Source Match Warning

If this occurs, no link will be established. You will need to identify the appropriate matches manually in the Data Transfer Manager, which appears when all links have been made. It is important to understand that only those Clooz sources that were linked to the reference file will be linked to the target file as well.

Visual clues are displayed in the Data Transfer Manager to show which records are linked. Note in the next image that an icon appears to the right of the check box, indicating that the record is now linked in the Clooz database. Please also remember that synchronization is not based on names, but is based on matching RIN numbers. The name test is only to produce a "validity check" for what you are doing to identify cases where different people have the same RIN number in their respective files.

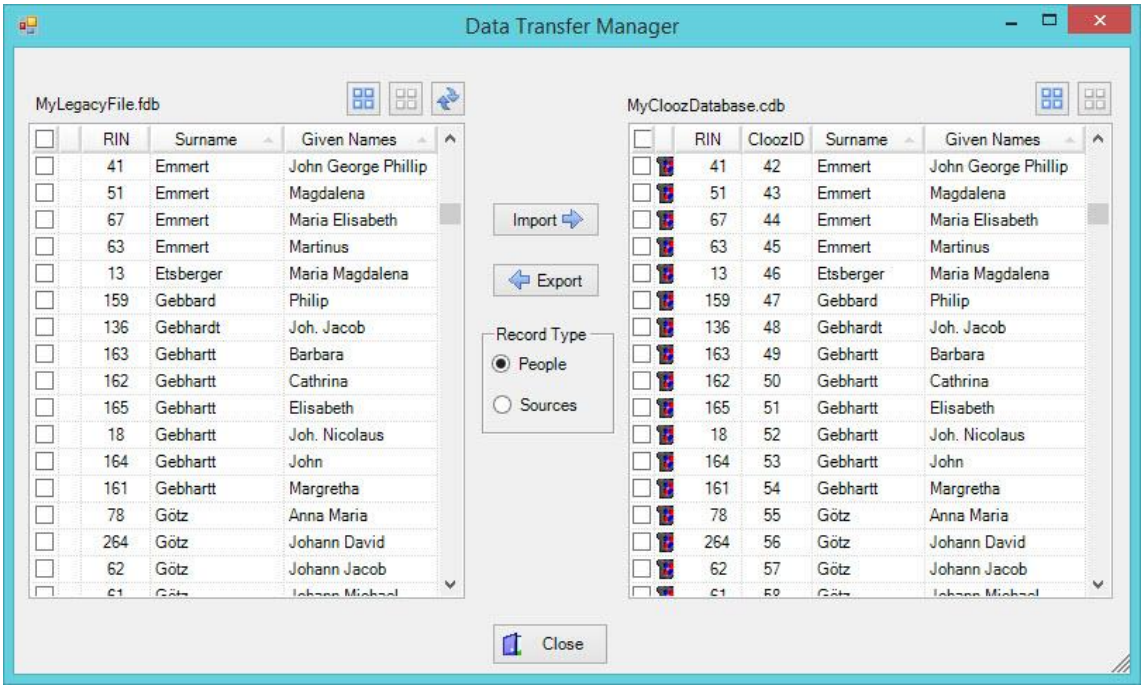


Figure 60 - Linked People in Data Transfer Manager

In the Data Transfer Manager you can make manual adjustments to the links by editing the RIN column on the right side of the form (where the Clooz data is displayed). The left side shows the external file data. The previous section of this user guide gave additional instructions on how to use the Data Transfer Manager.

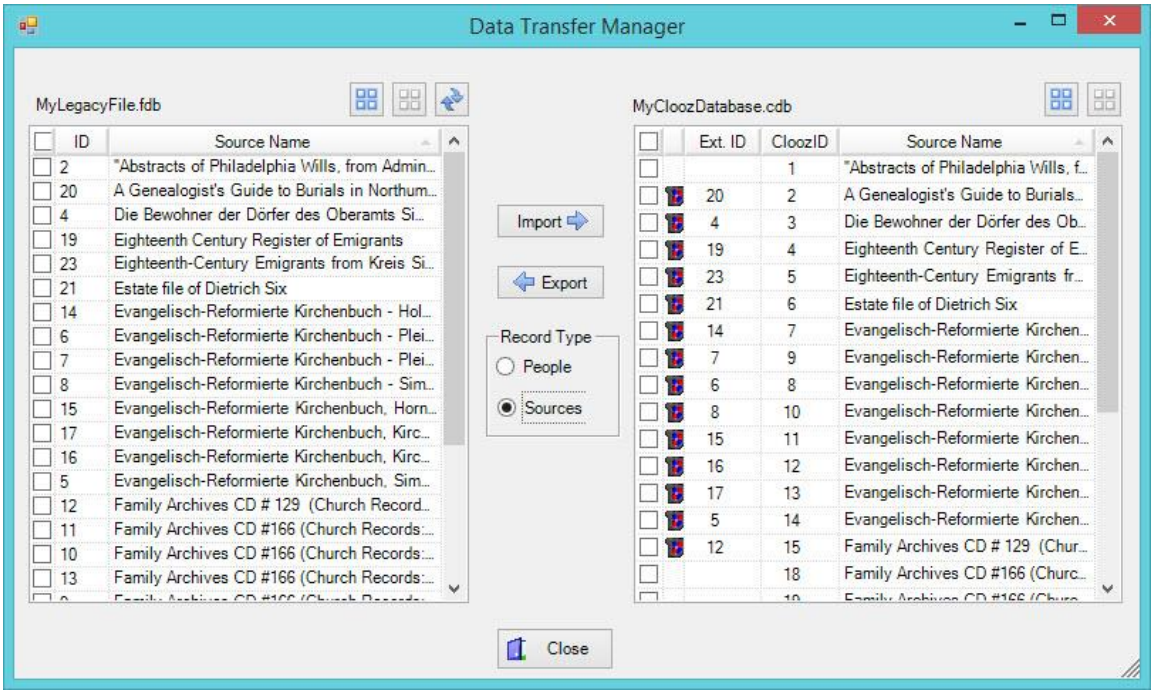


Figure 61 - Linked Sources in Data Transfer Manager

After Closing the Data Transfer Manager (*Close* button), be sure that the desired file is now the Primary external file (appears in bold font). This is the file the identification numbers displayed on the main screen (and while exporting) apply to.

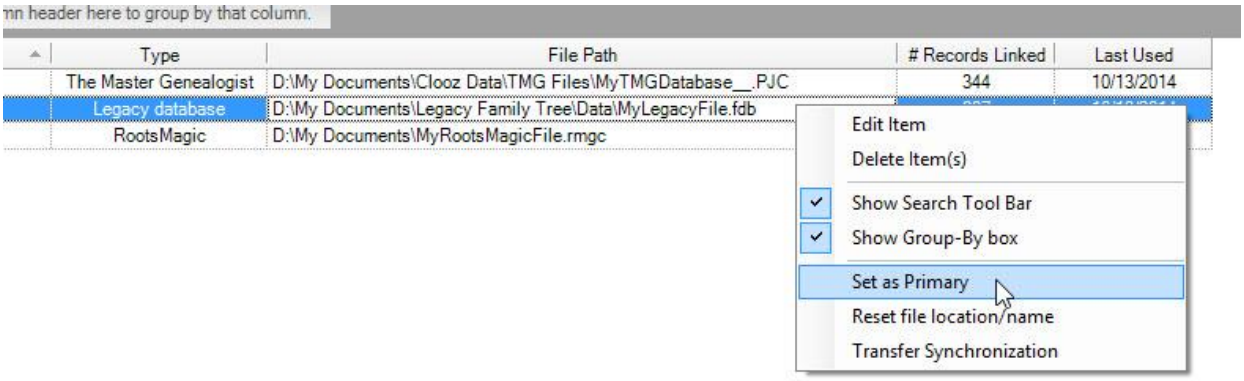


Figure 62 - Changing Primary External File

Entering Records

Now you're ready to begin attacking those stacks of unfiled records!

From the Clooz explorer bar, select the record type you want to enter. There are several choices: buildings; censuses; census substitutes; documents that don't fit into the first three categories; images; and sources. Once you select one of these choices, on the right of your screen you will see a list of all entries of that record type in Clooz (once you've entered data, of course). To add a new record, choose the appropriate selection from the explorer bar.

General Template Features

When you start using the various document templates you will notice there are a few sets of data entry controls that are the same in all of the templates. We'll discuss those here, instead of repeating the information when discussing the different document types. The example shown below identifies the various components of document templates.

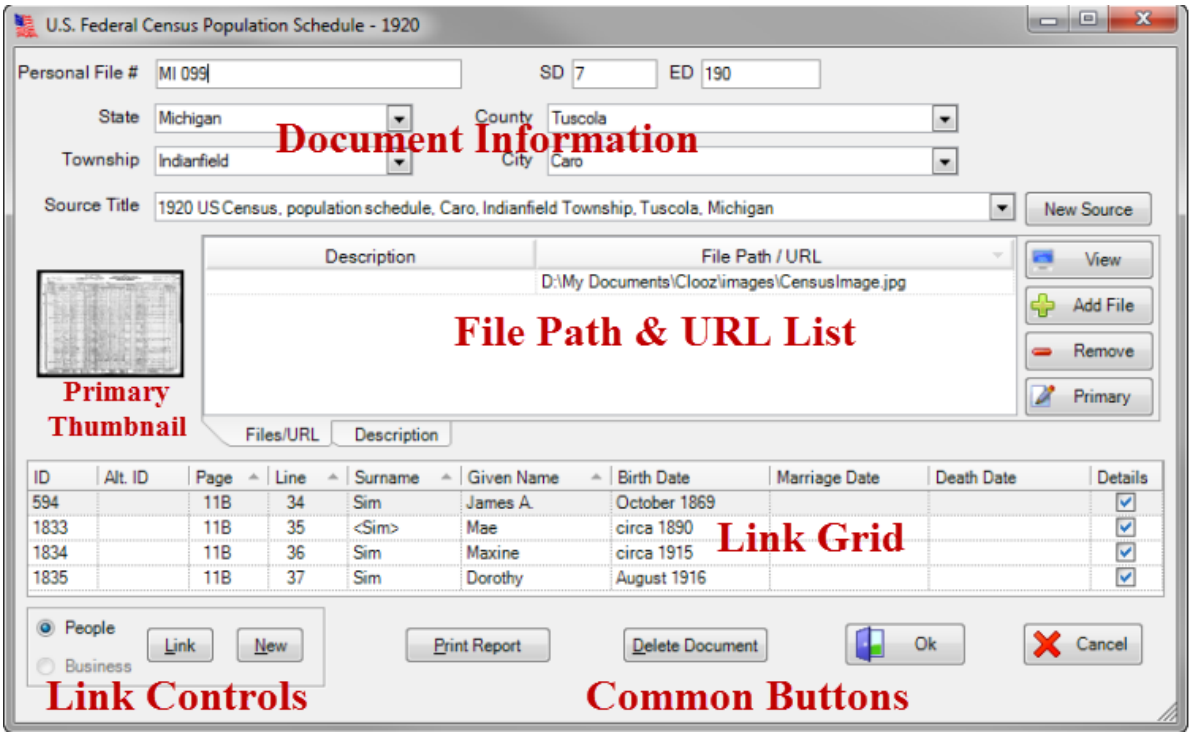


Figure 63 - Typical Template Components

Document Information

Each document template will have a data entry section at the top of the form for information applying to the entire document (versus that applying to a person). An example would be the Enumeration District for censuses.

Part of the document information section is a drop down control to select the source of the document. Click on the down arrow on the right side of the field, and the list of sources will appear. Click on the appropriate source. If the source you need is not listed, click on the *New Source* button and a form will appear to create a new source record. There will be more information on that later in the Sources section. If you want to edit the source, right click on the Source Title, and select *Edit Source*, or to clear the selection from this document, select *Clear Selection* on the right click menu.

File Path and URL List

The File Path/URL and associated description is there for you to record the digital location of the record you're entering, if there is a digital copy. For instance, if you have saved a copy of a document to your hard drive, then you would click on the Add File button to the right of the Digital File window. If the copy of the document you have is in graphic format (i.e. saved with an extension such as .JPG or .TIF), then it will be treated as a Picture. If you have a text transcription of the document (i.e. saved with a .TXT, .RTF, or .DOC or other extension), Clooz will treat it as a Document. Finally, if a URL for an Internet web site is entered in the File Path/URL cell directly, or dragged from an Internet browser program, it is recognized as a Website. The View button will have the system attempt to display the file using whatever software you have setup Windows to use as your default viewer for that file type. The Remove button will eliminate the link to the selected File Path/URL (the actual digital file is not deleted.)

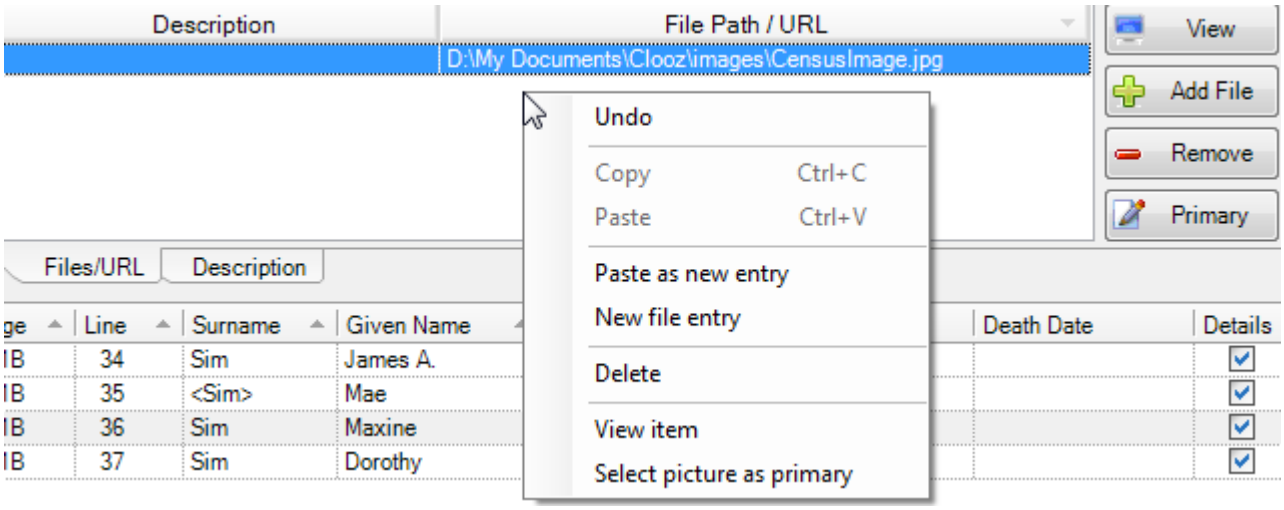


Figure 64 - File Path List Context Menu

The context menu for the digital files list can be displayed by right-clicking on the list of files. You can use this menu to paste in text, either to an existing item (if that was what you right-clicked on), or as a new entry. This could be a file copied from Windows Explorer. There is also an option in

the menu for you to create a new entry (blank), which you could fill out manually by typing. To edit any file path or description manually, just click in the text area to activate the editor.

One picture file can be selected as primary, and will appear on the form in the thumbnail area. Either select the file and press the Primary button, or right-click it and select the *Select picture as primary* context menu item.

Link Grid and Link Controls

The link grid holds references to the people or businesses that have been linked to the document. Double clicking on an entry in the Link Grid will display the details form for it.

The *People* and *Business* (if enabled for the particular document type) radio buttons in the lower left section of the screen determine whether the link controls and link grid apply to people or to businesses. Usually you will have it set on *People*, which is the default.

The Link and New buttons give you two options for linking a person (or business) to a document.

You can click the New button to have a new person or business generated by Clooz automatically based on the surname and given name entered on the details form that will appear.

–OR-

To associate an existing person with the document, click the Link button. The people (or business) selection screen will appear. Select a person from the list by clicking the check box in the far left column and click on the *Link Selected* button to link the selections to the underlying document. Alternately, you can double click on a single selection within the list to perform the same operation. You can only link a person or business to a specific research log record once.

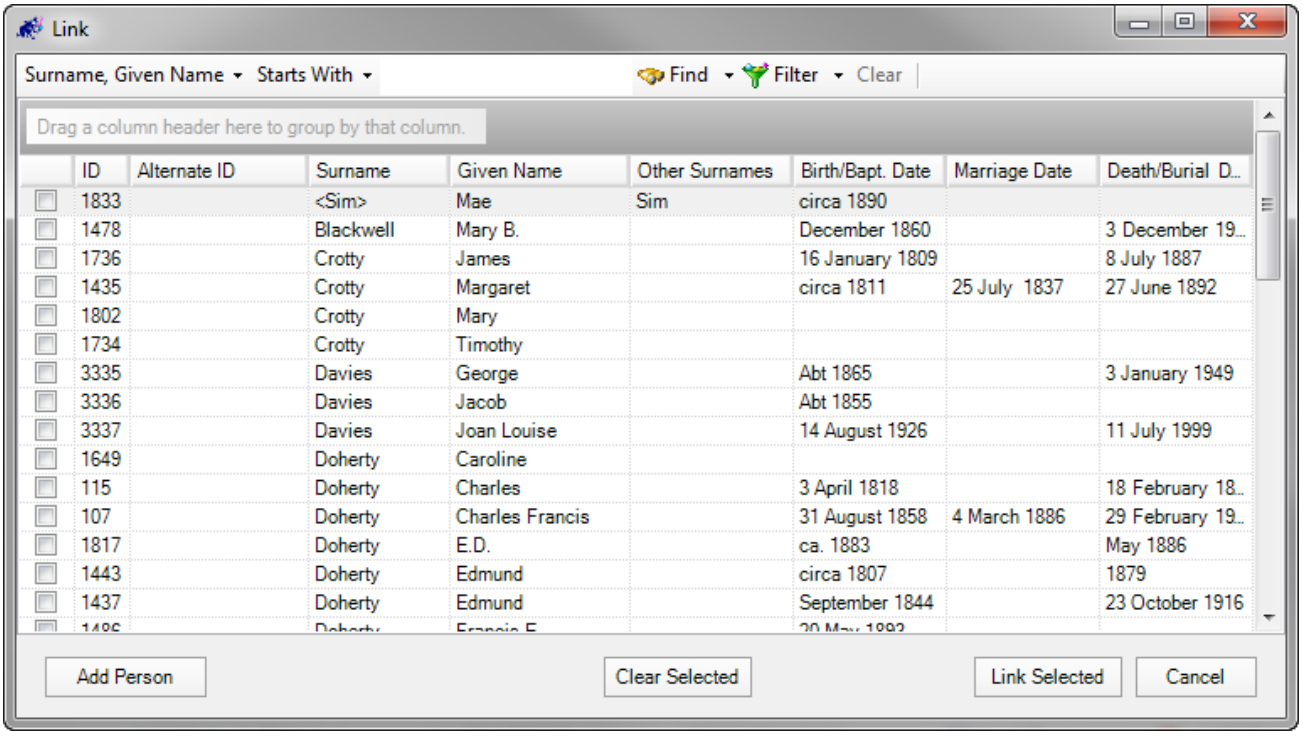


Figure 65 - List for Making Selecting Person to Link

You can find a name in your Clooz People list by scrolling to it or searching for it by entering your search criteria and clicking the Find button in the Search tool bar. This Search tool bar functions the same with the Link list as it does on the main People grid.

The Link Grid also has a context menu associated with it. The first three items are just alternatives to using the Link or New buttons, or double-clicking an item. The last item is the only way on the document form to unlink a person or business from the document.

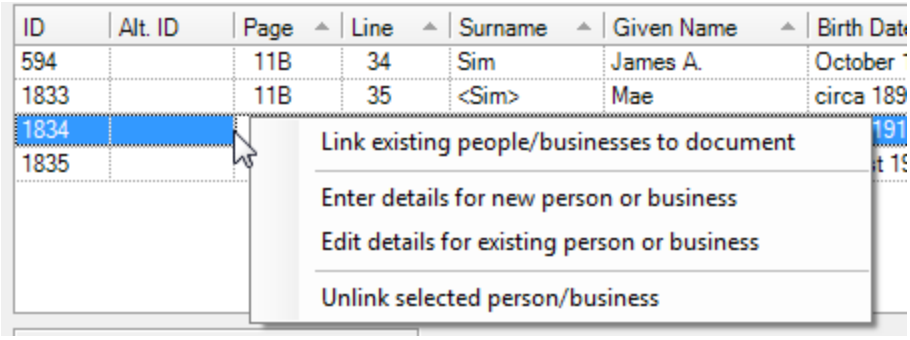


Figure 66 - Link Grid Context Menu

Common Buttons

All of the document template forms have buttons for deleting the entire document (including all of the links and associated details; but not the actual person or business), for printing a report summary of the document contents, and the standard OK (to save and exit) and Cancel (drop any changes made on that form) buttons.

Sometimes in Clooz you can call up one form from another, such as displaying the details for a person when double-clicking their entry in the Link Grid. You need to know that if you click OK on the second form, pressing Cancel on the original form will not undo the changes made earlier on the second form. Once you press OK on any form, the data associated with that form is saved.

Each time a document is saved, Clooz will check to see if a birth or death event can be determined from the data. If the main record for any of the people linked to the document has a blank birth or death date field, Clooz will automatically insert the value from the document. If a value is already present in the person's main record, no further action is taken, unless it involve the birth date from a birth record, or a death date from a death record. If either of these dates are different from what is in the main record, the user will be asked whether to change the value or not. If multiple people in a birth or death record are marked as Primary in their details forms, no attempt is made to enter the birth or death date into the persons' main records.

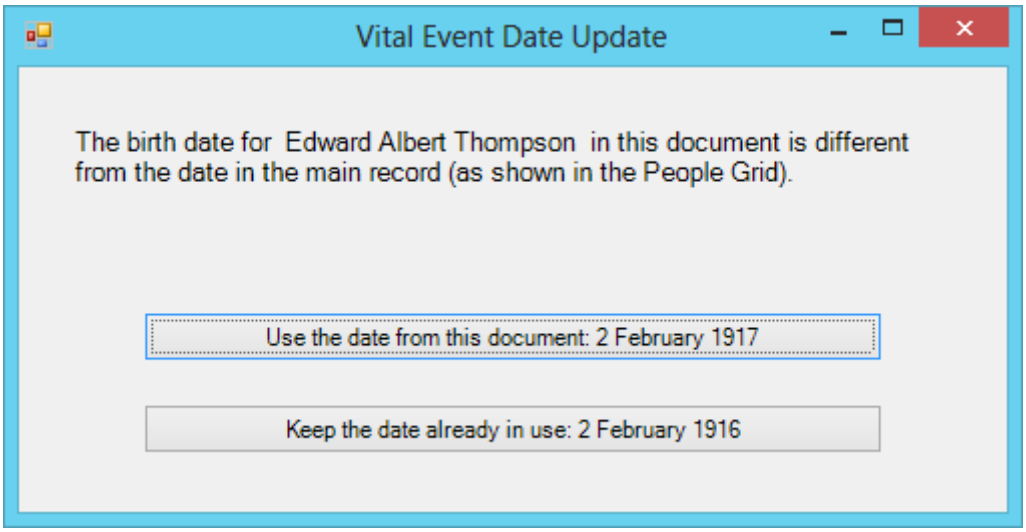


Figure 67 - Conflicting Vital Date Values

Buildings

Many people study the history of houses and buildings like genealogists study the history of their ancestors. Houses can have personalities, like people do. The Building template was designed based on forms used by state historic preservation offices to list buildings on historic registers. While the building you're interested in may not qualify for the historic register, it's still of significance to you and should be documented as much as possible.

The Building template is a bit different than other templates in Clooz, because of its unique purpose.

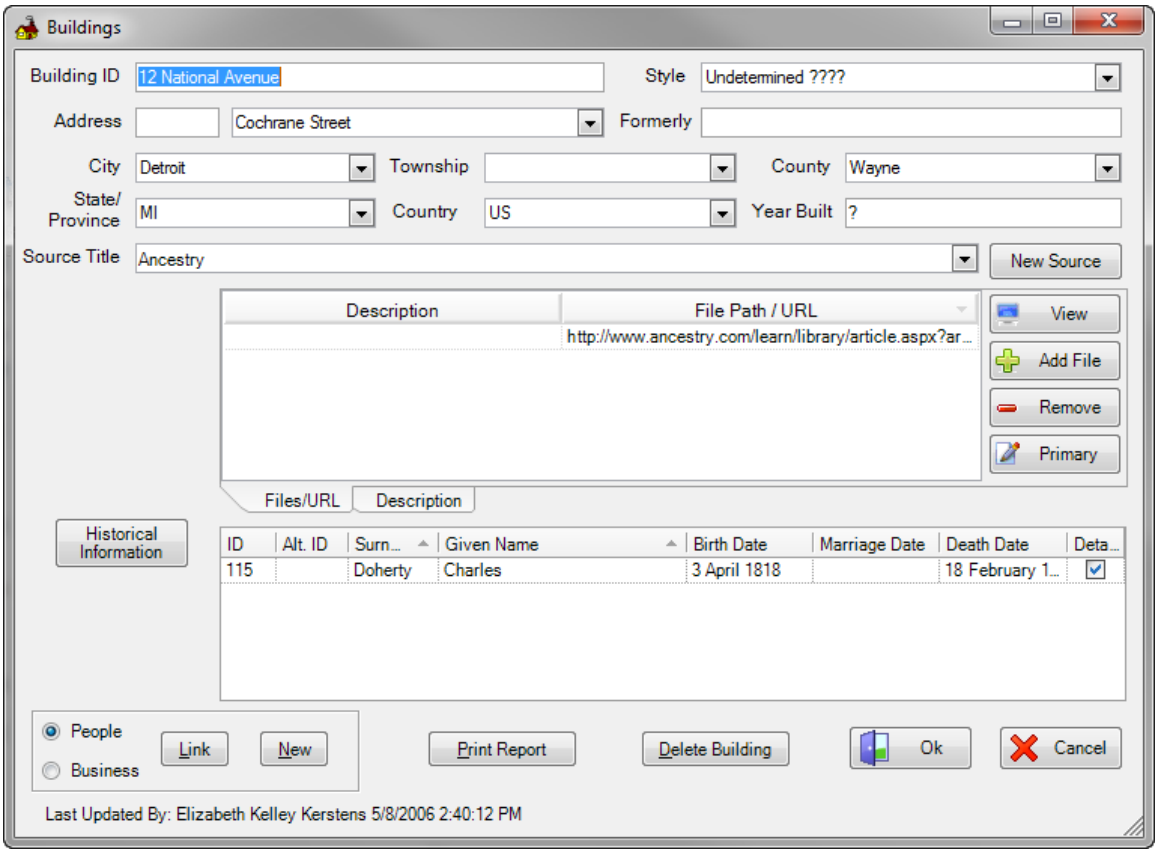


Figure 68 - Building Template

The Building Template is displayed by selecting *Buildings* on the Explorer Bar, and then selecting Add Building.

Add a Building ID. This ID can be anything you need it to be. Try to make the Building ID useful to you. In the example above, the ID is the street address of the building being entered.

Select a Style from the drop-down list. The architectural style of the building may already be known to you, or you can research the style through building records, or web- sites dedicated to architectural styles, such as Architectural Styles of America at <http://jan.ucc.nau.edu/~twp/architecture/>. If the style you're looking for is not already in the Style list, just type in the style and hit your tab key and the style will be added to the list.

Add the street address of the building. The Formerly field is where you would record street name changes. For instance, in Plymouth, Michigan, Penniman Avenue was called Sutton Street until 1912. If you reported the address as Penniman Avenue in order to identify the location today, Sutton Street could be added to the Formerly field for historical understanding.

Complete the location fields as appropriate. The fields that have down arrows (also called Dropdown Lists) next to them have entries that are used frequently during data entry. The data contained in these dropdown lists can be reused, so you don't have to retype the same places

repeatedly. If you make a typing error in one of these fields, you can correct it by selecting the Lists item on the explorer bar. Clooz is pre-loaded with all the U.S. states (both spelled out and in postal abbreviations), Canadian provinces, and months. You can add more places to the dropdown lists, such as "Wisconsin Territory" or a foreign state or province; by just typing in the new entry and hitting your tab key to advance to the next field.

Complete the Year Built field, if known, and then select your source, attach digital files, and link people or businesses as we discussed under the General Template Features section.

If you have historical information on the building, you can add it by clicking on the Historical Information button on the building form. Fill in as many of the fields as you can. These are the fields that correspond to historic preservation forms used to register buildings on the historic register. You may have compiled this information from a variety of sources. This button is unique for buildings.

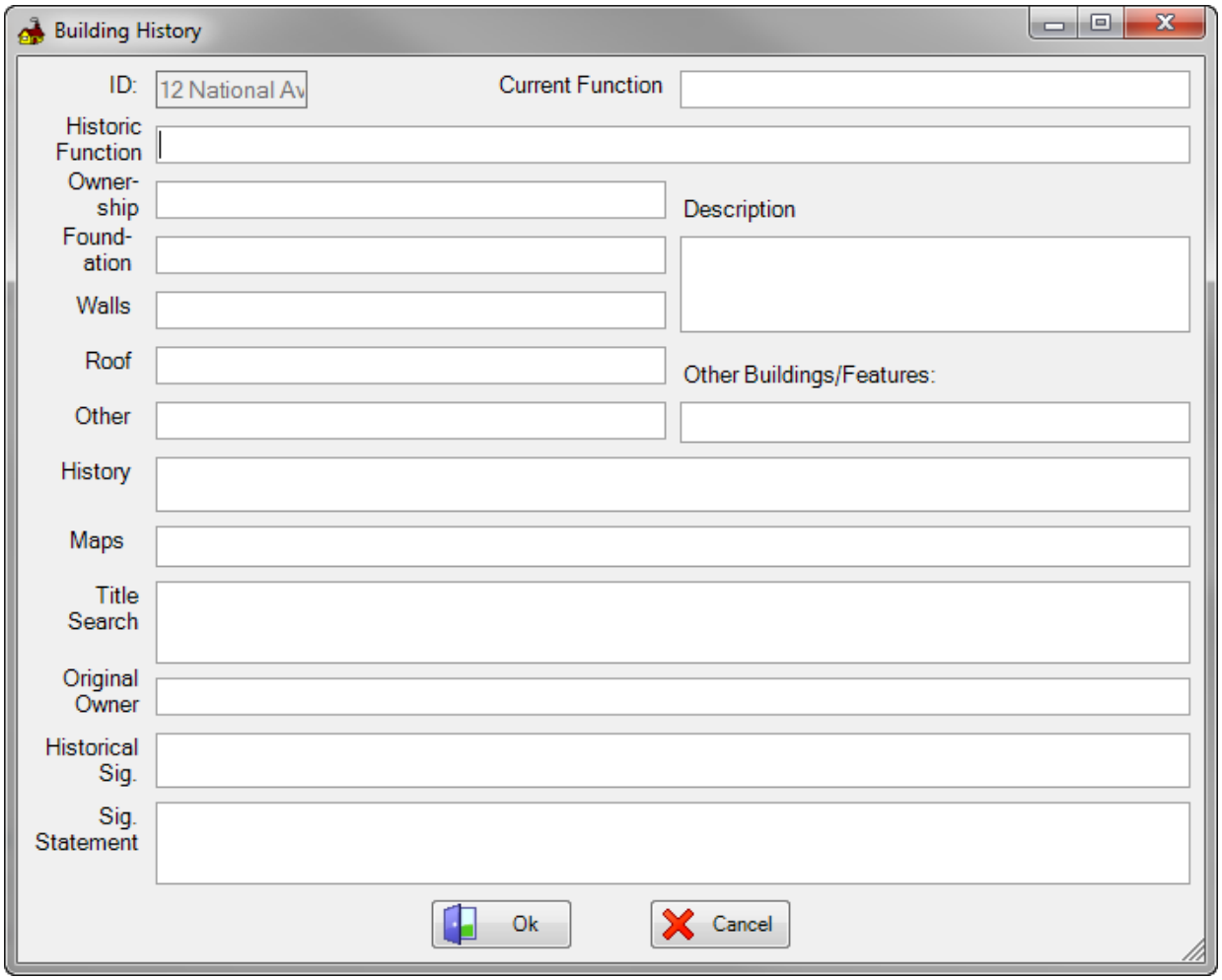


Figure 69 - Historical Information form for Buildings

Press OK to save the forms you have open and the building will now appear in the main grid list.

Censuses

This section will show you how to enter all of your census records from the United States, Canada, United Kingdom, Ireland, France, Germany, Norway, and elsewhere.

Template forms are available for U.S. federal, Canadian, U.K., Irish, French, German, and Norwegian censuses:

- U.S. federal decennial population schedules from 1790–1940
- U.S. federal non-population schedules from 1850–80
- Canadian decennial population censuses from 1852–1916
- Canadian non-population schedules where available
- U.K. decennial censuses from 1841–1911
- Irish surviving censuses for 1901 and 1911
- French censuses 1831–1901
- Mecklenburg-Schwerin (Germany) census for 1819
- Norwegian censuses for 1801–1900
- Other types of censuses in two generic forms—the head of household and every member in the household (for censuses not having specific templates, like state censuses)

To enter a new census record, choose the country of the census you are interested in on the Explorer Bar along the left side of the main screen. For instance, if you're working on a census from the U.S., select U.S. Censuses. The U.S. Censuses category will expand so you can see all of the template choices available to you.

Under the U.S. Censuses category, you have choices for Population Schedules, Mortality Schedules, Agricultural Schedules, Manufacturing Schedules, and the Defective, Dependent, and Delinquent Schedule. Select the appropriate year from the choices available on the list. The most commonly used category is the Population Schedules, where your ancestors are listed in their neighborhoods.

The document template will then appear for the year and category of census you requested. Fill out the document information describing the area of the census you are working in. Include the location information based on what appears on the census pages you are looking at. Do not mix census information from different districts in the same document. Rather, you should create additional census documents for different districts, or even different households if that is your desire.

Source information and digital files should be entered, and people should be added as described in the General Template Features section. Only some of the census schedules allow businesses to be added.

The details form (displayed by double-clicking on a person in the Link Grid or by pressing the *New* button) will vary greatly between the different census schedules and years. One such form is shown below as an example. The fields on the form will match the columns on the census form.

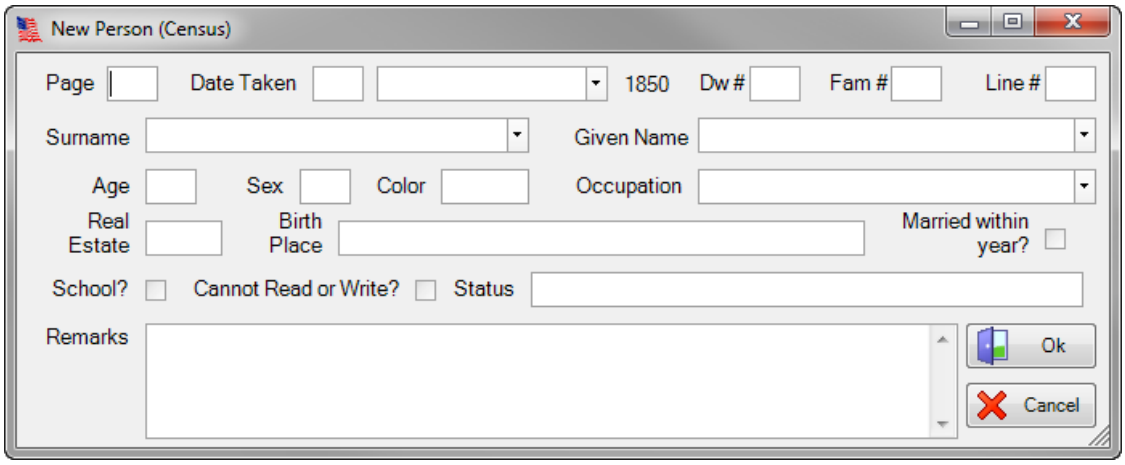


Figure 70 - U.S. 1850 Census Details Form

Enter the information exactly as it appears on the census document for that person. You can note any suspected errors in recording in the Remarks section. Once you complete the data for that person, press OK to save it.

If you edit the details of one person, and then select another person from that same document (or press *New*) for which no details have been ever entered, you will be asked whether you want details filled in based on the previous person.

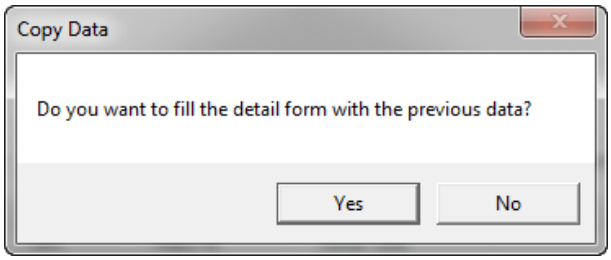


Figure 71 - Auto-fill Personal Details

This only applies to certain fields that are likely to be constant for the same household, such as surname or dwelling information. You can always change those values when the details form appears, so this does reduce your typing somewhat. If you return to a document record that was only partially done, you can cause this feature to be invoked by just editing one person (and then immediately press OK in the details). Otherwise, it will not be asked for the first person being added.

You will also notice in the details form that some of the fields, such as sex, will automatically capitalize the first letter of whatever is entered (say "M"). This allows for consistency in the appearance of your data without having to constantly search for the shift key.

Census Substitutes

What are census substitutes? In some countries, census records are not available for various time periods. Reasons vary, but the records are not available. Therefore, we need to turn to other records to fill in gaps created by missing census records. There are a variety of records that can fill these gaps, including directories, tax and voting records, and in Ireland, valuation and tithe applotment records.

Clooz contains templates for four different types of directories:

Population—these are commonly called city or county directories

Religious—these are church directories

Farm—these are rural directories

School—these are school directories or yearbooks

In addition to the directories, there are also templates for tax records, voting records, Irish valuation records, and Irish tithe applotment records in the Census Substitutes category of Clooz. If you've mastered entering censuses, entering census substitutes should be a snap. You enter data the same way in all templates in Clooz.

To create a new census substitute record, choose the Census Substitutes category, and then select the type of record you want from the expanded list. For example, the Population Directory template (see Figure below).

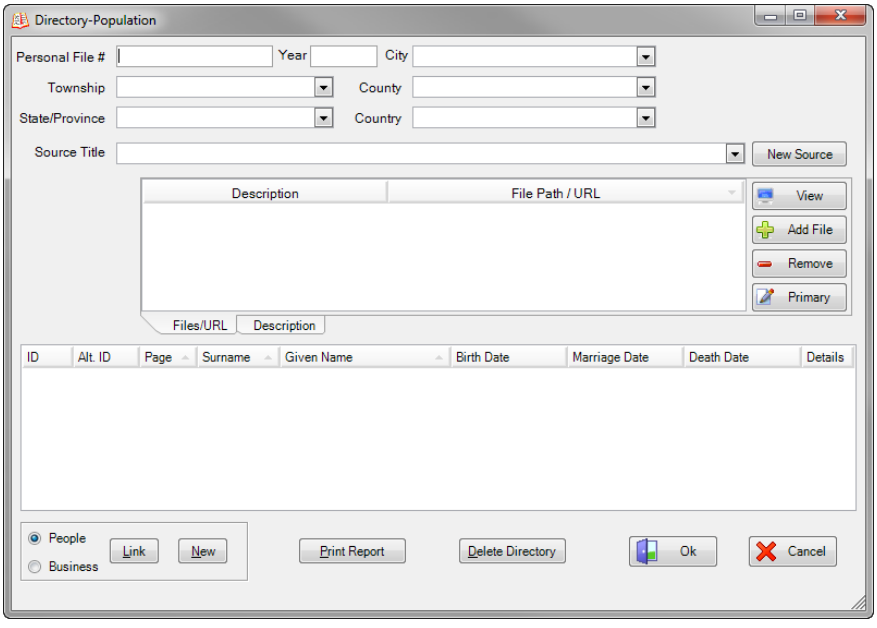


Figure 72 - Population Directory Template

This is a fairly straight forward document. On this form you would enter the location for the directory, and then link in the people. Double-clicking a person would display a form to enter details for them.

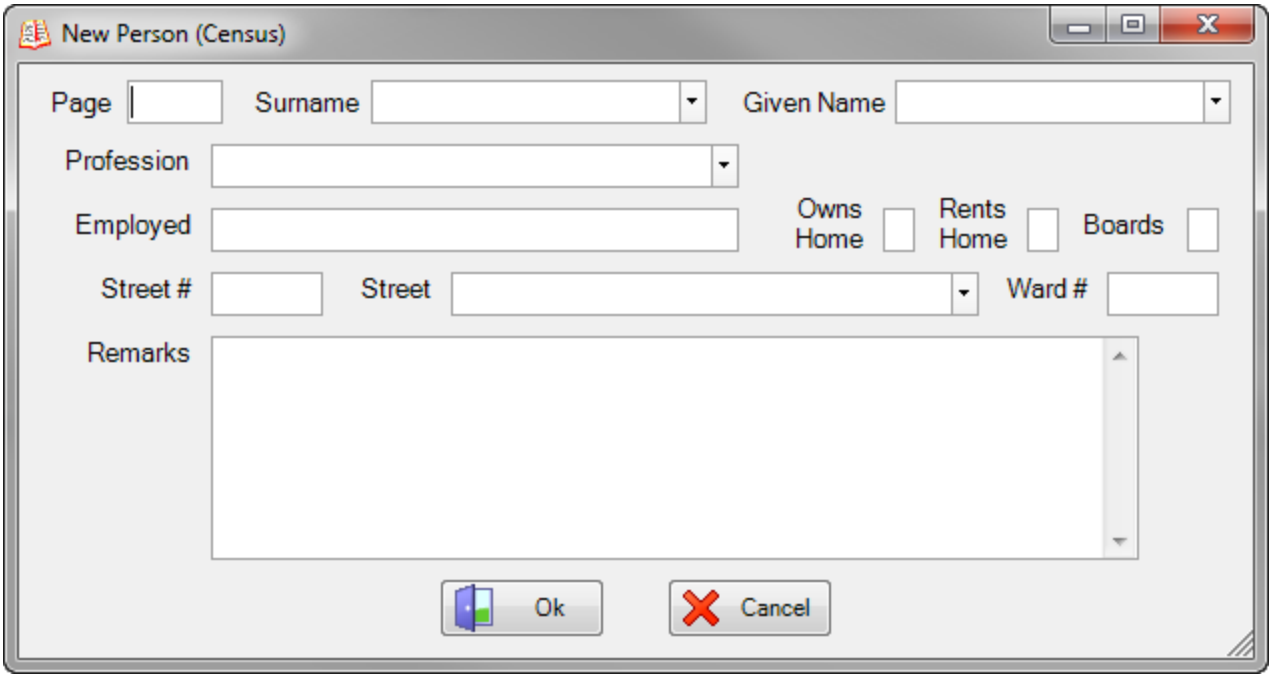


Figure 73 - Population Directory Details Form

Documents

This section on Documents shows you how to work with virtually any type of genealogy records other than the censuses, census substitutes, and images. You'll discover here how to enter documents, including:

Birth records

Marriage records

Death records

Funeral/burial records

Deeds

Correspondence

Naturalization records

Passenger lists, both early and later (early passenger lists did not contain a lot of information; if the list you're working with contains a lot of details, select the later passenger list choice)

Social Security Death Index (SSDI)

Generic documents—many other records, such as family history notes, pedigrees, and family group sheets.

Don't enter any census or census substitute records in Documents. They've got their own templates in their respective categories.

If you have a document that is not close to any other type of document, you should always be able to make use of the generic document. When judging how well your document matches one of Clooz's templates, be sure to examine the detail forms, not just the document templates.

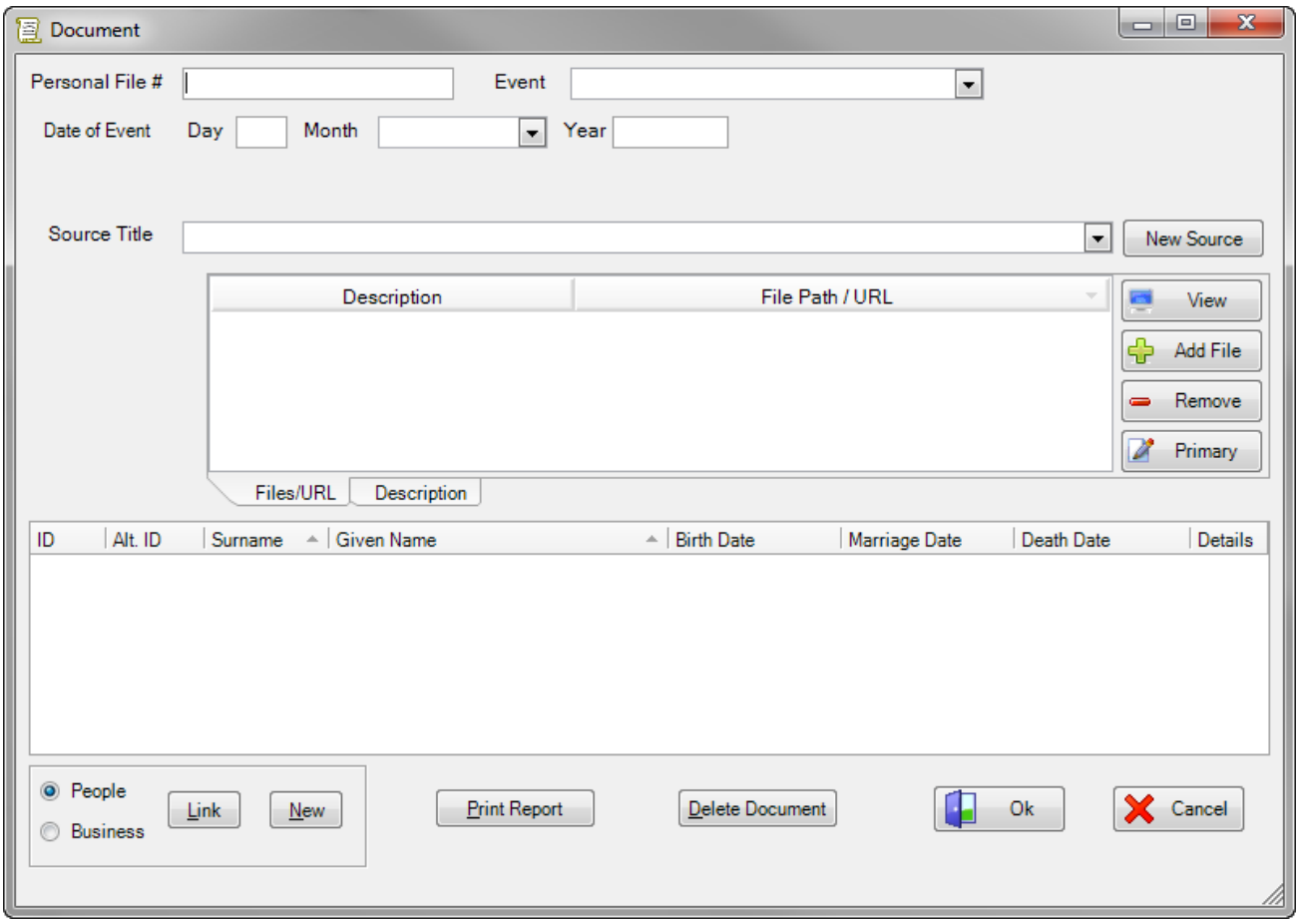


Figure 74 - Generic Document Template

Like the other document templates, refer to the General Template Features section for instruction on using most of the items in this form.

The Generic Document template allows you to define the event to which it applies. This will allow you to sort records entered using this form by type of event.

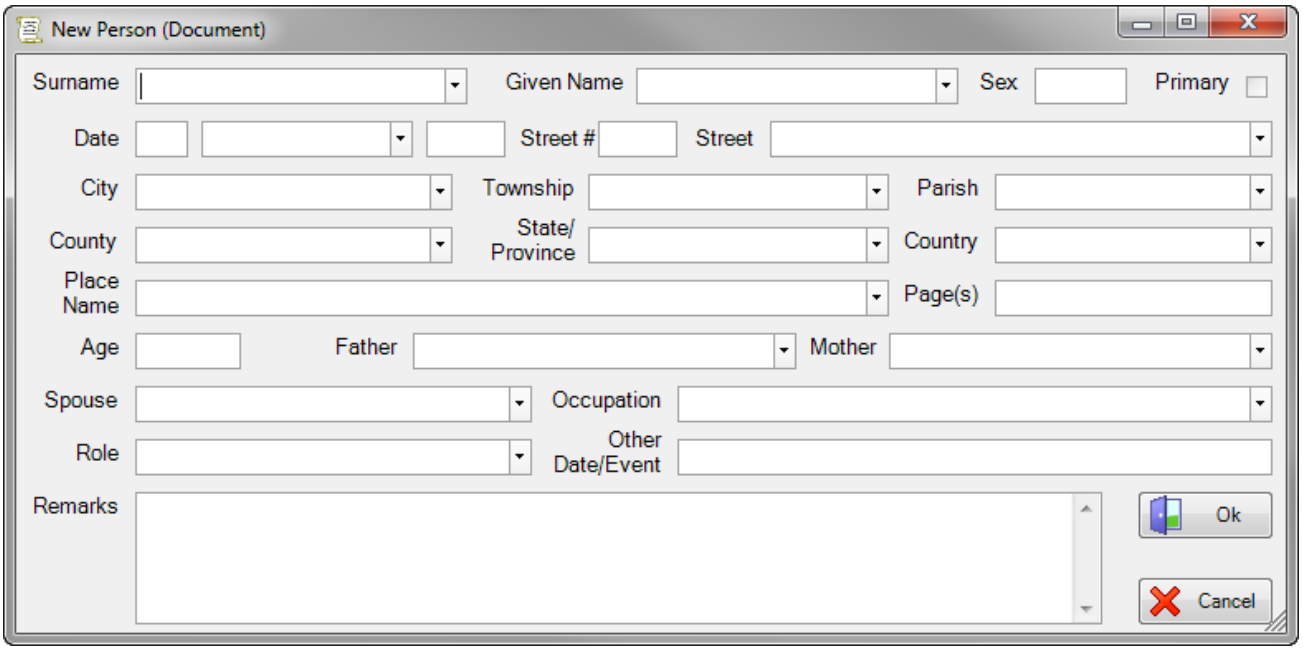


Figure 75 - Generic Document Details Form

Images

You can finally organize all your family images in Clooz, and you will never have to search for a picture of Uncle Rob again. It will be right at your fingertips, that is if you have a picture of Uncle Rob and he is in your family and you've put his image in Clooz. Anyway, you get the point.

What's more, you can even print a photo record with thumbnail pictures for each ancestor in Clooz—just a great way to organize your pictures and see what you have at-a-glance. It will impress your family and even your ancestors!

This section explains how to create a new image record and insert a digital photo in it.

If you click on the Image button on the Explorer Bar, you see that there are two types of images listed: Map and Photo. Since maps and land diagrams are common in family history research, they can be classified separately from other photographs for sorting purposes.

The photos and maps you enter under this Image category are treated slightly differently than those you might have attached to other documents and sources. The document and source images are

typically either a direct image of a document or transcription. The images in this Image category are usually photographs of a place, person, or event. The Image template, unlike other documents, only has room to attach one digital file. Each photo or map should be given its own Image record.

When you click on the Image button (Explorer Bar), the list of images appearing in the main grid area are those entered using these Image templates, and do not include digital files that might be attached to documents and sources in your database.

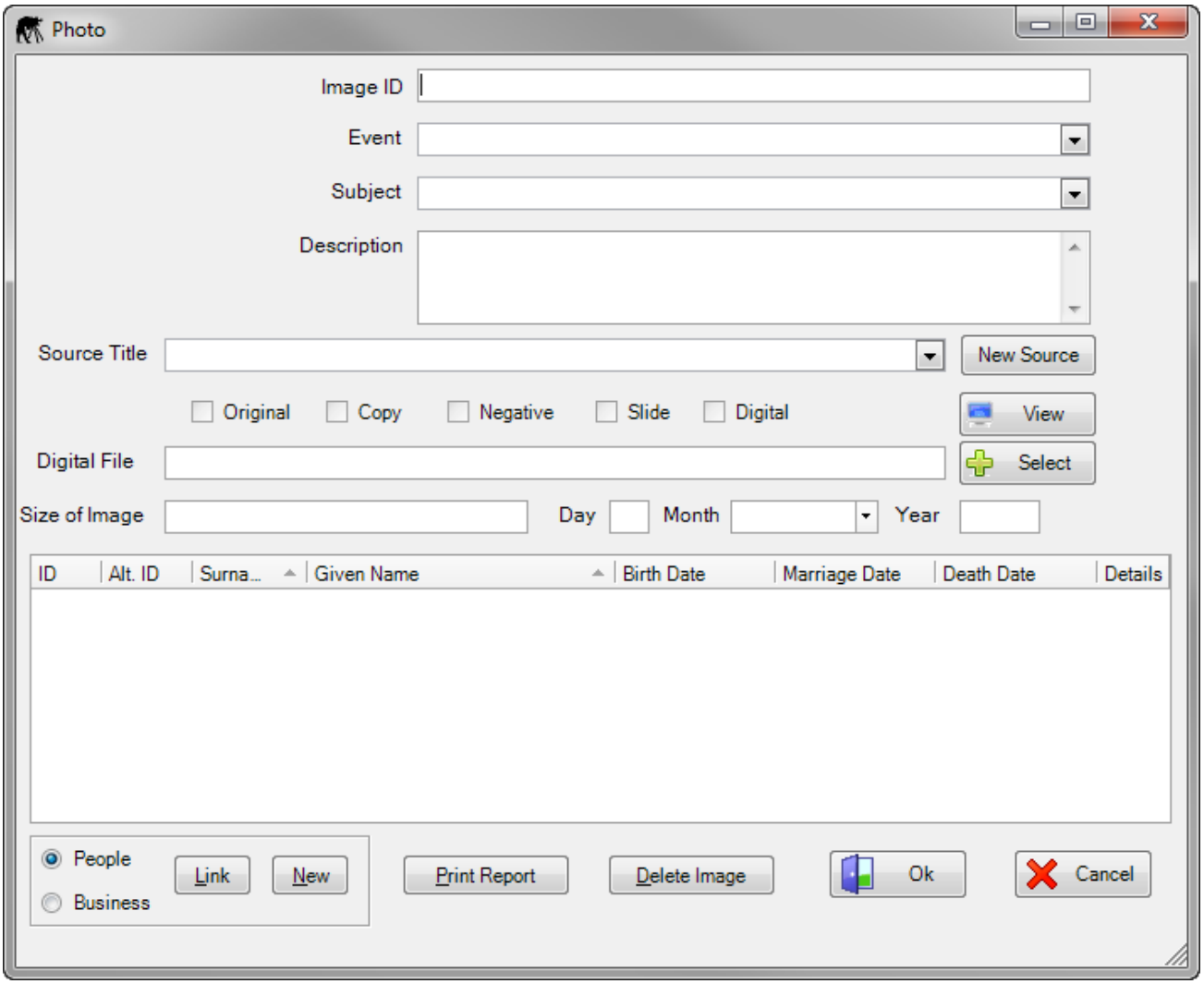


Figure 76 - Images Template

The details form for photographs is extremely simple.

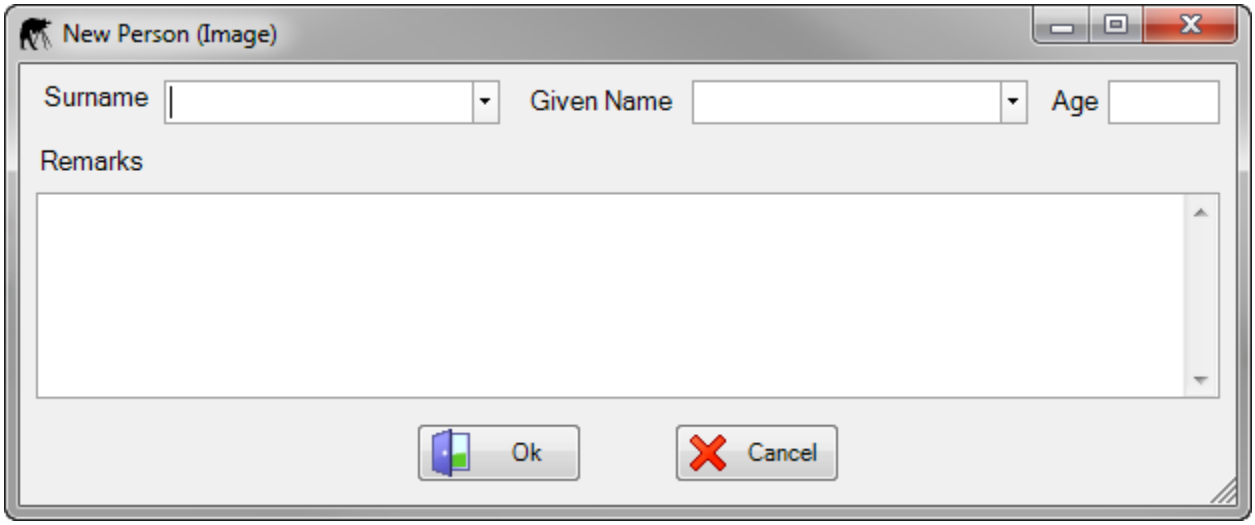


Figure 77 - Photo Details Form

The map detail form has many more specific fields that you can use.

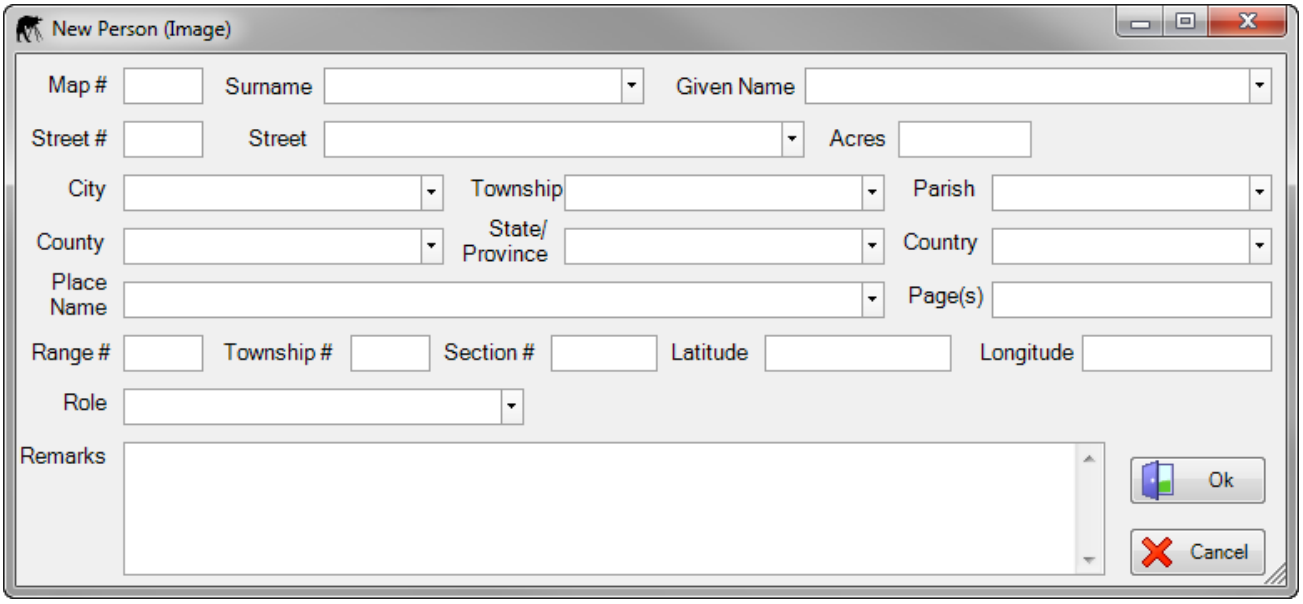


Figure 78 - Map Details Form

Sources

We know some people aren't diligent in properly documenting sources. We won't lecture you on its importance. But we will say that Clooz can make the task a little easier. Clooz provides forms to document your information. They include fields for Source Titles, Authors, Publishers, Repositories, Call and Roll Numbers, and Remarks, and more. You only have to enter this bibliographic information once because Clooz memorizes it for you.

The Clooz source templates are based on Elizabeth Shown Mills' book *Evidence! Citation & Analysis for the Family Historian* (Baltimore: Genealogical Publishing Company, 1997). Elizabeth Shown Mills does have a more recent book, *Evidence Explained – Citing History Sources from Artifacts to Cyberspace*, Second Edition, revised (Baltimore: Genealogical Publishing Company, 2012). Due to the lack of standardized data exchange formats for source information, movement of source information between Clooz and lineage-linked software packages has proven to be a real challenge. Work is continuing in this area. However, since Clooz is more of a research tool than a publication tool, your main objective in using Clooz for the time being should be to capture all of the necessary source information, and less on the fine intricacies of detailed source formats, since formats tend to get disrupted anyway when the information is moved into another program.

Before you start, realize the difference between a source and a record. In short, a *source* is where the record originates and a *record* is the information you're interested in within the source. For instance, a published city directory would be a source. The page of the directory containing your ancestor's name would be the record that contains the information you're transcribing into Clooz. You would fully cite the city directory on the appropriate Clooz source template, but the information contained within the directory would be entered into a Clooz template for city directories.

Clooz contains eight different source templates. The source templates should be selected based on the source's *original format* when an exact image is shown, not based on how you looked at the source. For instance, the manuscript census that each of us has looked at on microfilm or on Ancestry.com is actually an unpublished document in its original format. Think of it as a bunch of pages, and that's what constitutes a "Document" in the Clooz Source templates. The U.S. census became a publication when it was distributed by the National Archives on microfilm. But first it was a document, and that's what you would need to select for a Clooz Source. You'll be able to record the microfilm or CD publication information about censuses and other such documents within the Source template. However, if the census data was transcribed or somehow modified to be in a textual database for instance, the transcribed database would be the appropriate source to cite.

Each of these Source templates will be explained in this section:

Book	Certificate	Document	Image
Journal	Newspaper	Register	Website

There's no trick to this, a book is a book. In essence, a book is something that has been published in print format. Webster has multiple definitions for a book, but the one that applies here is "a set of written, printed, or blank sheets bound together into a volume." Examples of book sources include printed genealogies, city directories, printed histories, county histories, and printed transcribed records.

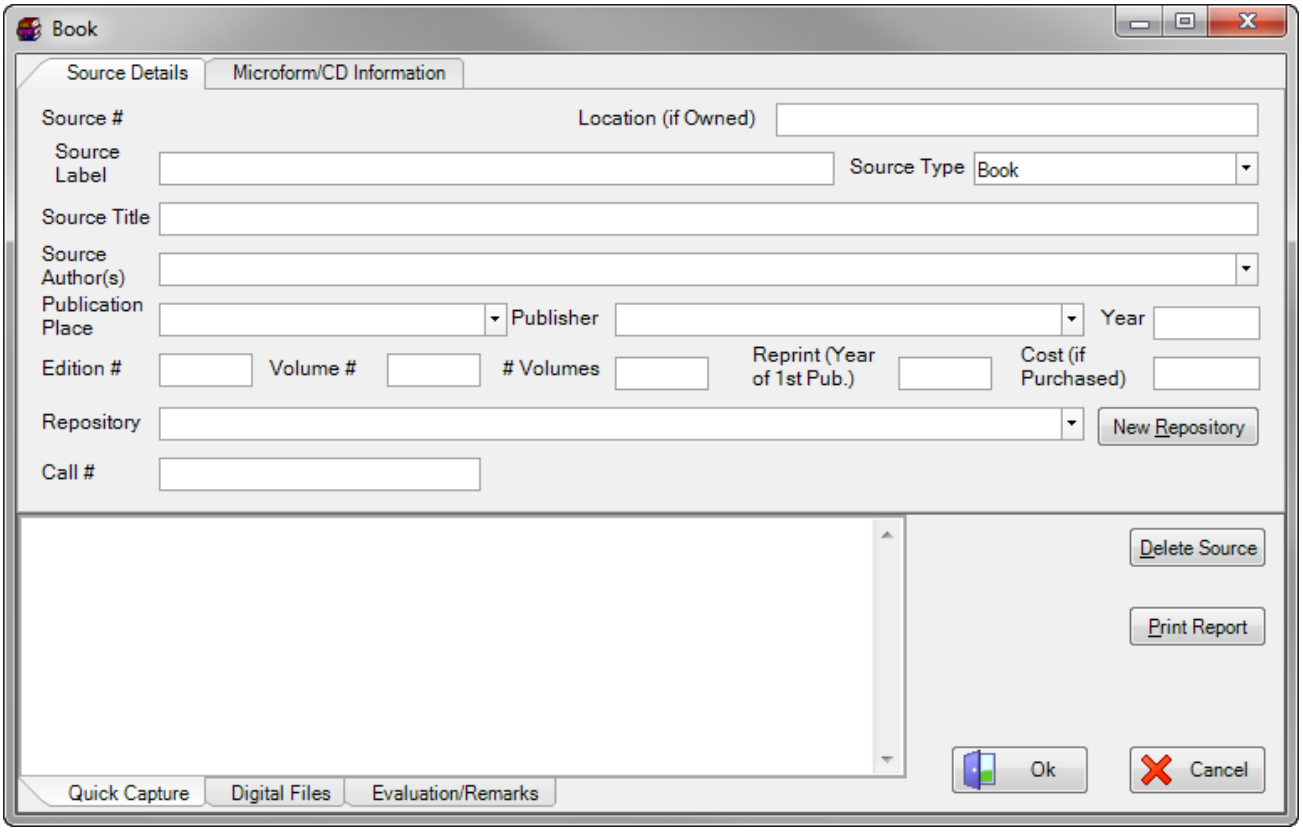


Figure 79 - Book Source Template

You should notice that this template (as with most of the source templates) has tabbed pages at the top and bottom of the form. The second page (tab) at the top is where the Microform/CD information gets entered.

The bottom set of tabs offers some tools to use. The Quick Capture text box is simply a multi-line text box, but it also supports clipboard functions (cut/copy/paste) and more importantly, drag and drop operations. You could be looking at an online document where the data provider has a source citation on the screen. Just highlight the whole block of information on the web site and drag it into the Quick Capture box. From there you can copy/paste segments to the appropriate fields.

The Digital Files tab provides means to save digital attachments or URLs, the same as in the document templates.

A certificate is something that you obtain from a clerk's office, government agency, or other authority to prove that an event occurred. Webster says a certificate is "a document containing a certified statement especially as to the truth of something." Examples of certificate sources include

birth, marriage, and death certificates, certifications in various professional fields, and a baptismal certificate.

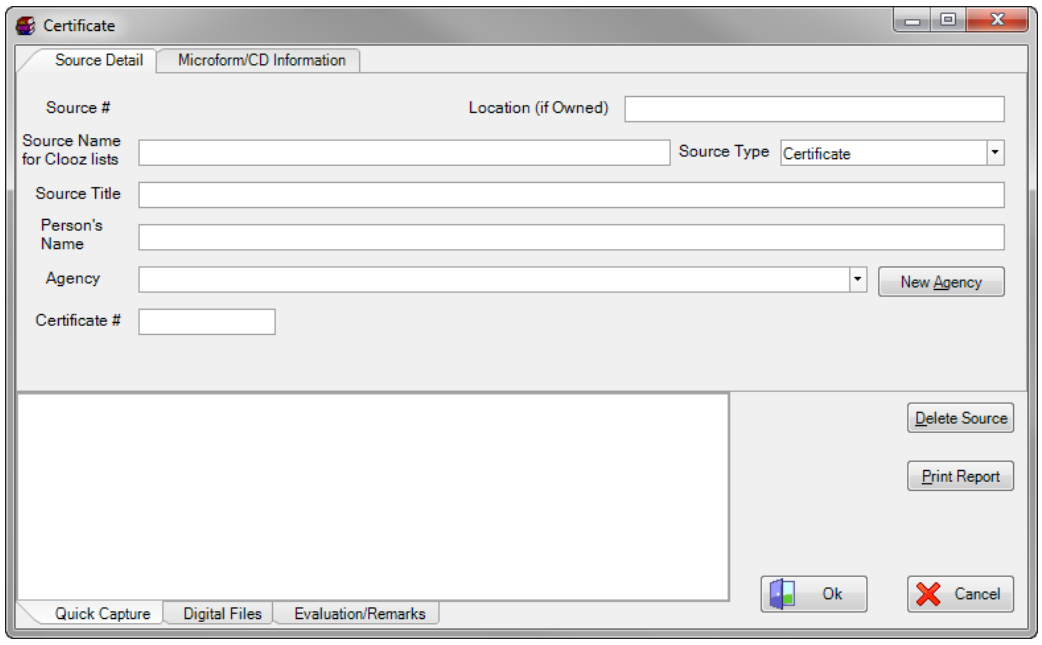


Figure 80 - Certificate Source Template

A document, generally speaking, is something that is unpublished. You might find documents in archival collections, in libraries, or in personal papers. Webster says a document is "an original or official paper relied on as the basis, proof, or support of something." Examples of document sources are letters, manuscripts, family papers, and the manuscript census as described earlier.

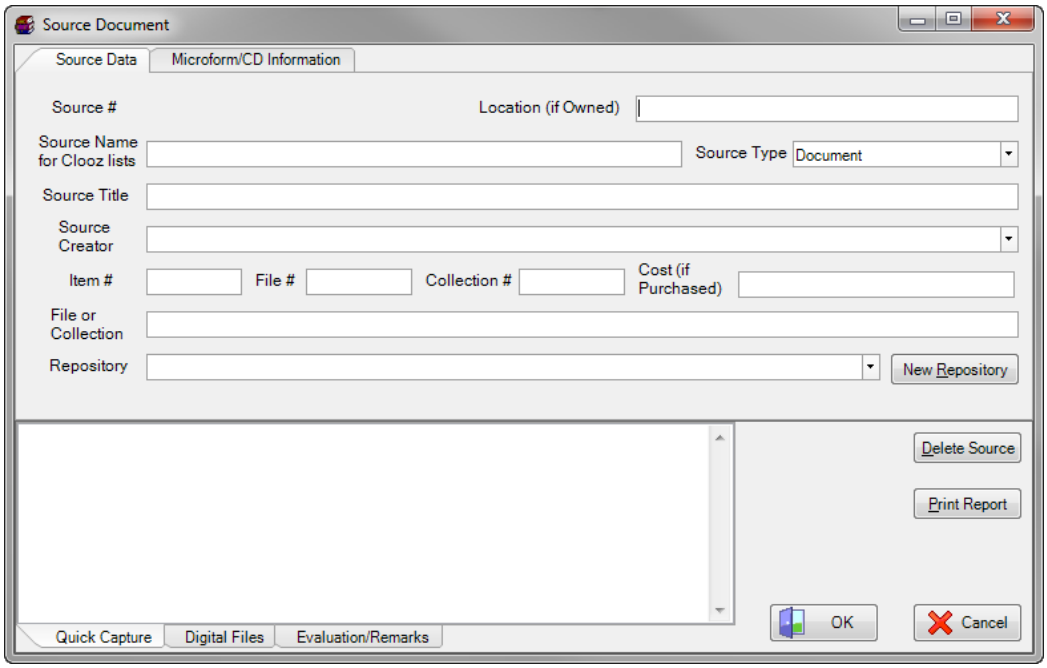


Figure 81 - Document Source Template

An image is just what it sounds like, a picture of something. Webster describes an image as "a reproduction or imitation of the form of a person or thing." Examples of image sources are photographs, negatives, and maps.

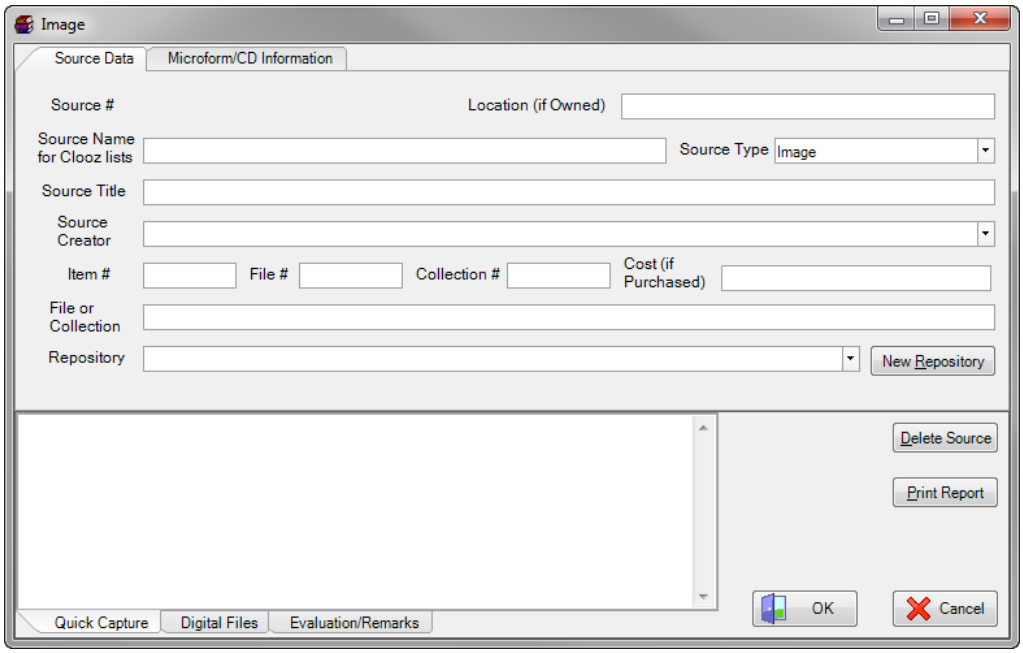


Figure 82 - Image Source Template

A journal is published periodically in magazine format, or, more recently, on the Web. Journals typically come out less frequently than newspapers, therefore they are usually valued more for their feature content than their news content. Webster defines a journal as "a periodical dealing especially

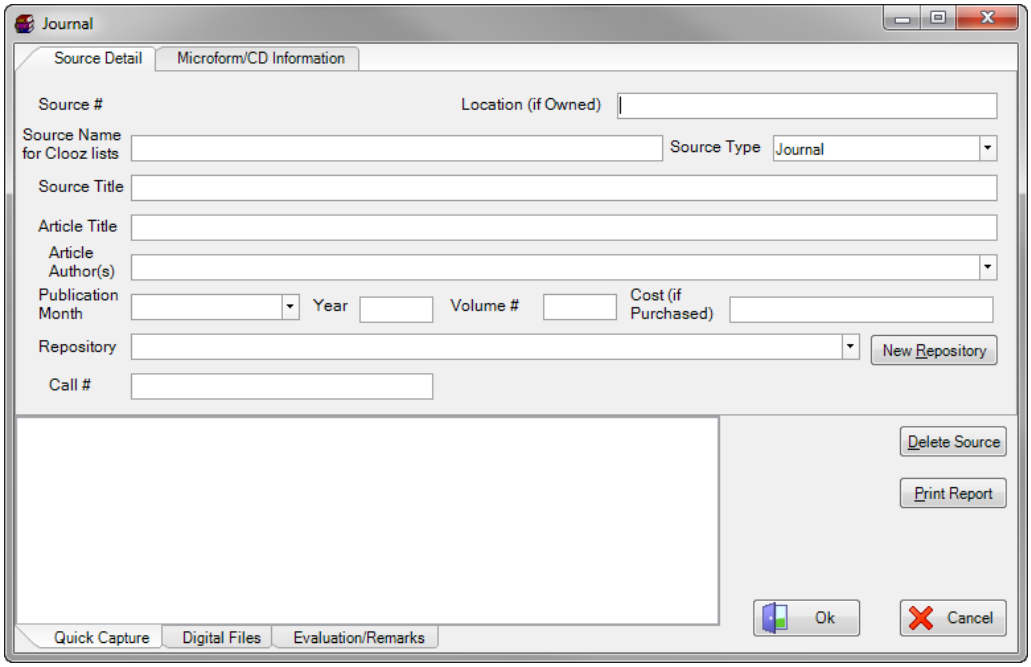


Figure 83 - Journal Source Template

with matters of current interest." Examples of journal sources include the National Genealogical Society Quarterly and the New England Historical and Genealogical Register.

Everyone should be familiar with newspapers. Today newspapers come out daily, biweekly, or weekly, and contain news for a given locality. In our ancestors' times, newspapers might have been published less frequently, but were still considered newspapers. Webster describes a newspaper as "a paper that is printed and distributed usually daily or weekly and that contains news, articles of opinion, features, and advertising." Select Newspaper as a source if you have an obituary from a newspaper. The newspaper itself is the source, but the obituary would be entered as a Clooz generic document.

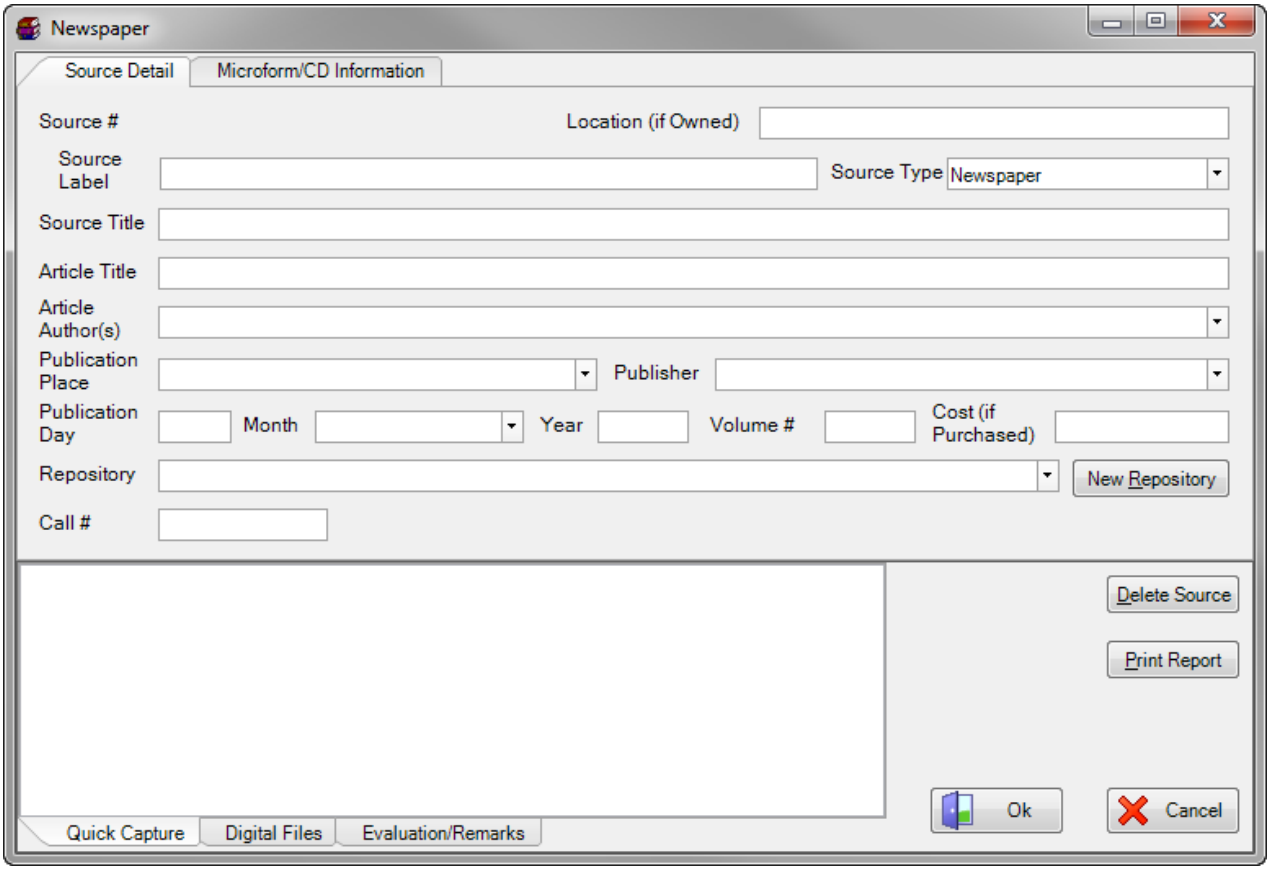


Figure 84 - Newspaper Source Template

Registers are most frequently unpublished records kept regularly by clerks or authorities, frequently written in blank books with printed lines or formats. Webster says a register is "a written record containing regular entries of items or details." Register source examples include ledgers containing tax or voting lists, business records, and church records.

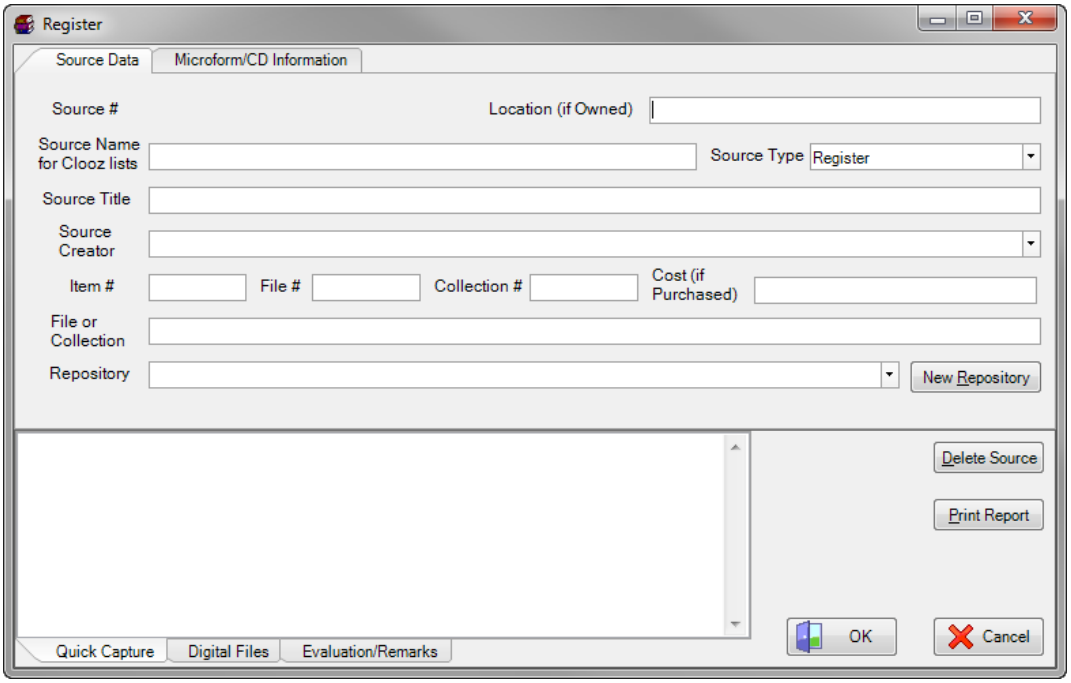


Figure 85 - Register Source Template

By now, most of us are familiar with websites. Anyone with a little time and storage space can put up a website on the Internet. Many of us find valuable genealogical information on database search sites, such as Ancestry.com or HeritageQuest.com. Citing the information found on these websites is useful, but it's usually a good idea to download an image of the record found, or print a copy of the page of interest, as websites change rapidly.

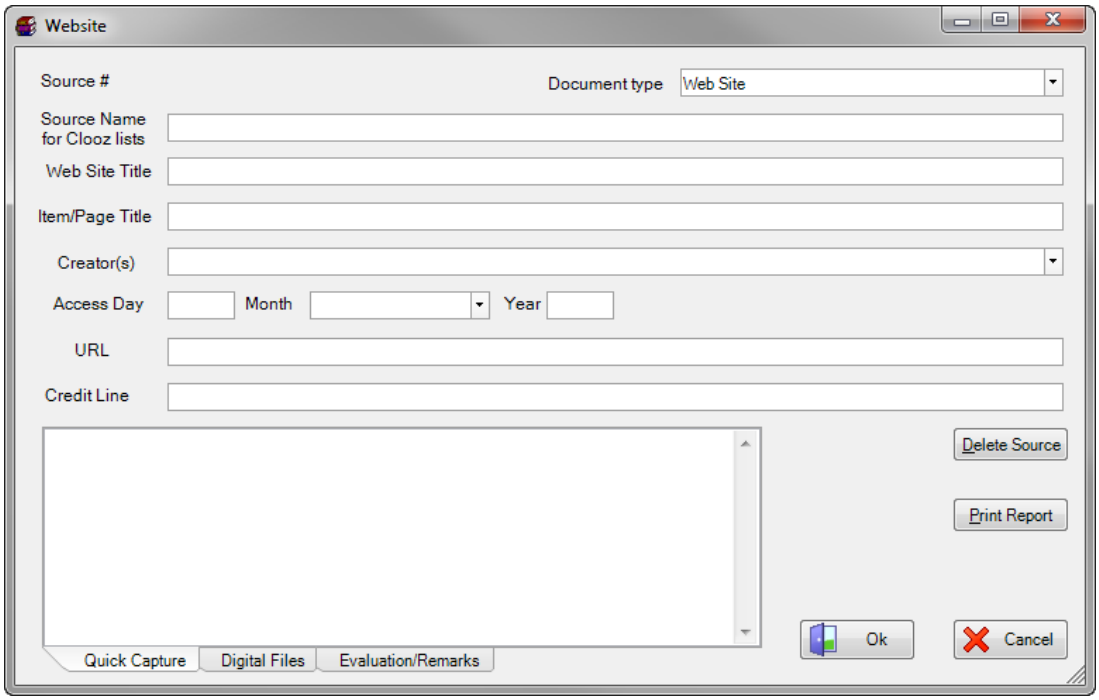


Figure 86 - Website Source Template

Some additional tips with sources:

Evaluation of Source. This field appears on all the source templates, and is for you to write notes to yourself about the source and how credible you feel it is. If the source that you are entering has been either microfilmed or published on a CD, click on the second tab labeled "Microform/CD Information." This is where you will enter the rest of the information about a source that you viewed in other than its original format. Try to fill in as much information as possible so you could find this source again, if you needed to. If you saw the source on a microfilm available through the Family History Library, you would record the call number and item number on this second tab.

There's one field you should pay attention to, especially if you selected the wrong source type. The "Source Type" field (the last field on the second tab) shows you what type of source you are working on. If you have selected the wrong source, click on the down arrow and select the correct type from the list. Close the source form (Ok button). When you open it again, the proper source template will appear.

If you converted your data from a previous version of Clooz, some source entries were created for you. These will need your attention. In earlier versions of Clooz, census and photo records didn't have source entries. The information about these was on the input screen. In order to standardize data input in Clooz, all templates now are set up similarly and require source input on these source templates. Therefore, during conversion, Clooz created census and image sources for you, and arbitrarily gave them titles. Census records were given a title such as "1870 US Census 002" and were converted as Document sources. The source title for photos was taken from the description field, and images were converted as Image sources. You should spend some time making these sources conform to your style of citing sources.

Additionally, since Clooz didn't know what type of source your existing sources were, they were all (except censuses and photos) converted as Book sources. You should go through each imported source and select the correct source type, based on descriptions above.

Repositories

Each source has a field for you to select the repository where the source was held. This is most important to record for documents that are unpublished and perhaps only held by this repository. It is less important to document where you found a copy of a published book that might be in libraries all across the globe.

To display the list of all repositories, click on the Repositories button on the explorer bar. The list of repositories will appear in the main grid area. Repositories also appear on the source forms as drop down lists from which you choose the appropriate entry. If the repository you used is not on the list, press the New Repository button, and complete the form that appears.

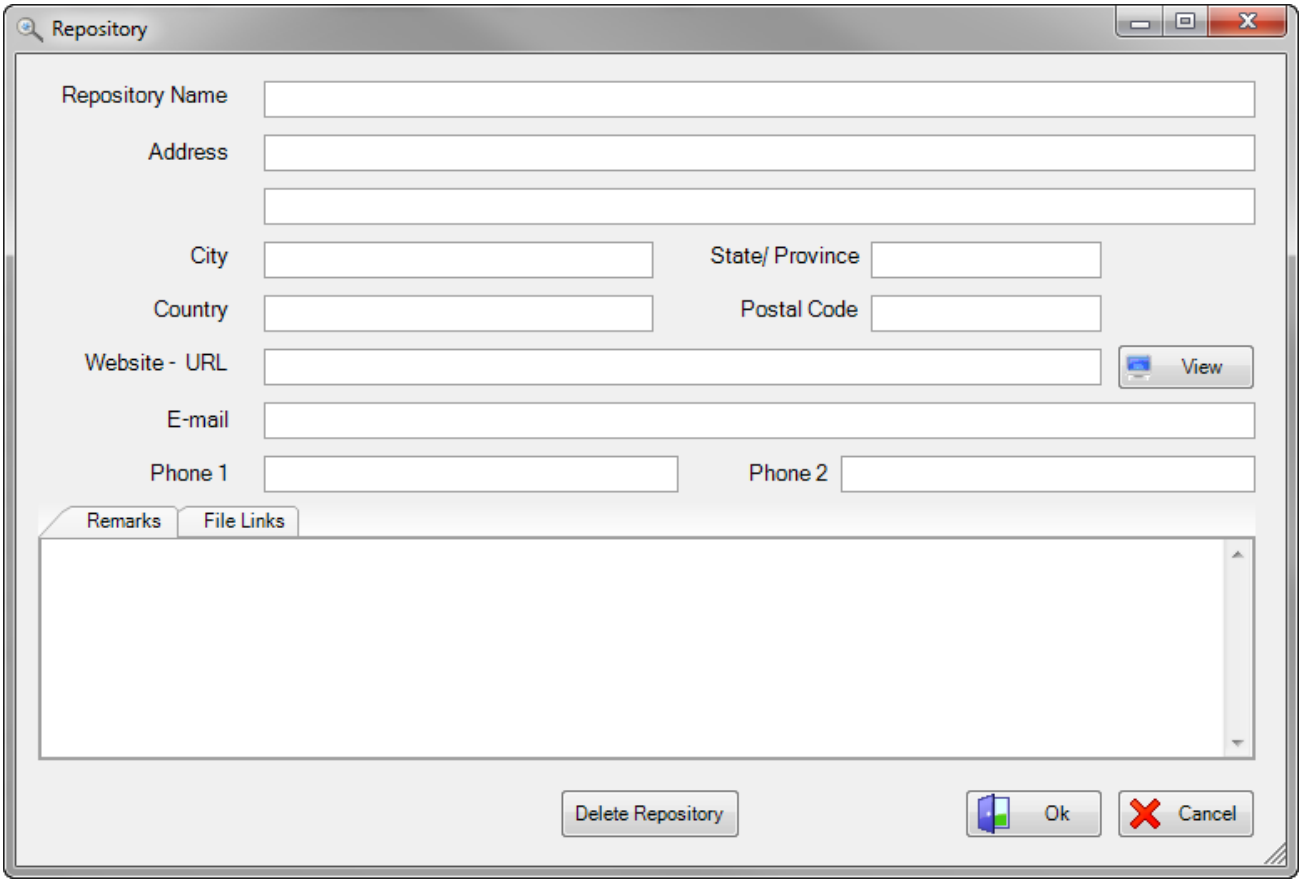


Figure 87 - Repository Form

To enter a web site address in the URL field in the middle of the repository form, drag the small icon to the left of the URL in your web browser program into the repository's Website field. Pressing the view button will call up the web page in your default web browser. To delete or change the URL, edit it directly as a text box.

You can edit repository records by one of three methods:

Double-click the repository item when displayed in the main grid area.

Right-click on the repository item in the main grid area, and select Edit Item from the menu that appears.

Right-click on the repository appearing in a source form, and select Edit from the menu that appears.

In any of those cases, the Repository Form on the previous page will be displayed containing the data for the record you selected.

There is an additional capability for you when you right-click on the repository list in the main grid. By first selecting multiple repository records (by clicking with the CTRL key held down), the Merge Repositories item becomes enabled. When you have duplicate repositories listed, use this command to merge them into one record. All of the sources linked to those repositories will be switched to the new merged repository.

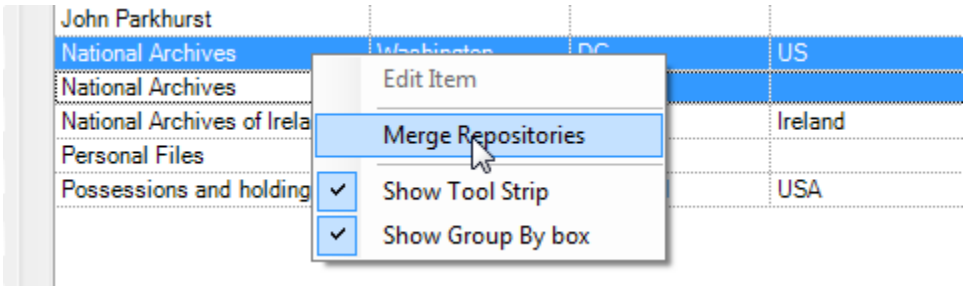


Figure 88 - Repository List Context Menu

Edit Lists

Dropdown lists or boxes throughout Clooz save you from retyping frequently used information you've already entered or that is pre-loaded in the program, such as months, surnames, given names, and localities. You'll know if it's a dropdown list if it has a down arrow at the right end of the field. Click on the small Down Arrow to see the Dropdown List.

You may occasionally need to change this memorized data, such as delete a duplicate or unused entry or correct a typo. You can do this directly from the Clooz explorer bar or menu.

To edit a Dropdown List from the explorer bar or menu, take these actions:

From the Clooz explorer bar, click Lists. (Or from the menu bar, click Edit then click on Lists.)

From either the explorer bar or the menu bar, select the list you want to edit:

Cities	Names	Subjects
Counties	Nationalities	Surnames
Countries	Occupations	Townships
Districts	Parishes	Types
Establishments	Places	Villages
Events	Religions	Item Type
Farms	Roles	Media Type
Given Names	States	
Locations	Streets	

A list editor form would appear as follows:

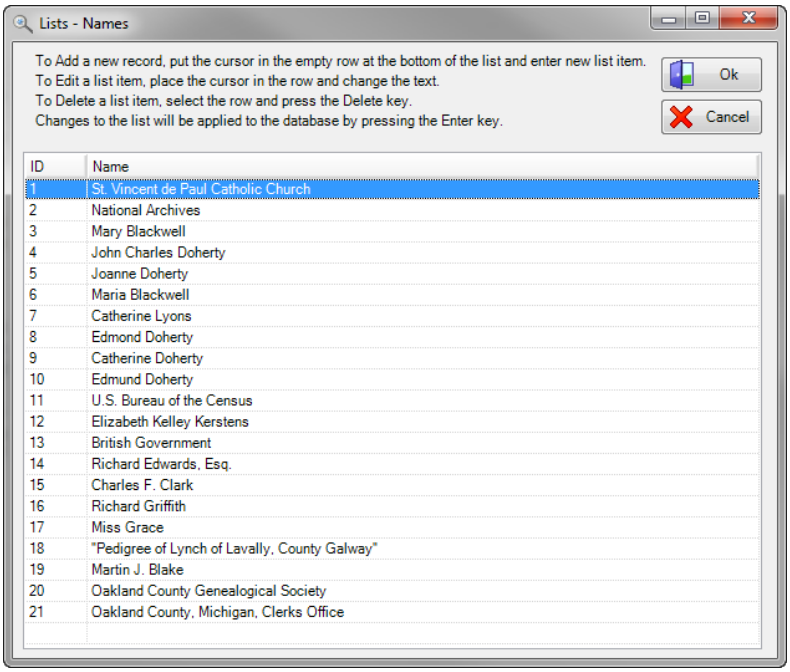


Figure 89 - List Editor Form

Scroll through the list you've selected to find the entry that you need to edit or delete. You will warned if you're trying to delete the entire entry that is used in the database. However, if you have

placed the cell (2nd column) in edit mode (by clicking in it), the delete action applies to the text characters in that field (vs the whole record). Thus you could end up deleting the text, leaving a blank field to be used throughout the database. If you accidently delete the text, right-click the second column entry, and select Undo.

The figure below shows the entry in edit mode, with the "I" shaped cursor. Deleting text while in this state will not check for usage of that entry in the database. Right clicking the edit field will give a context menu with Undo and Copy/Paste options.

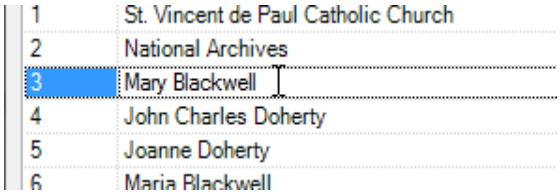


Figure 90 - Editor Cell in Edit Mode

To select lines without activating edit mode, click on the first column. All of the lists, other than Names, have a context menu for checking usage and merging items. Right-click on the left column to display the context menu containing these commands.

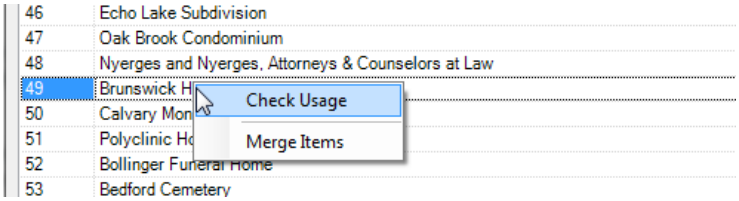


Figure 91 - Place List Editor Context Menu

The Check Usage function will display a list of all the records which use that particular list item.

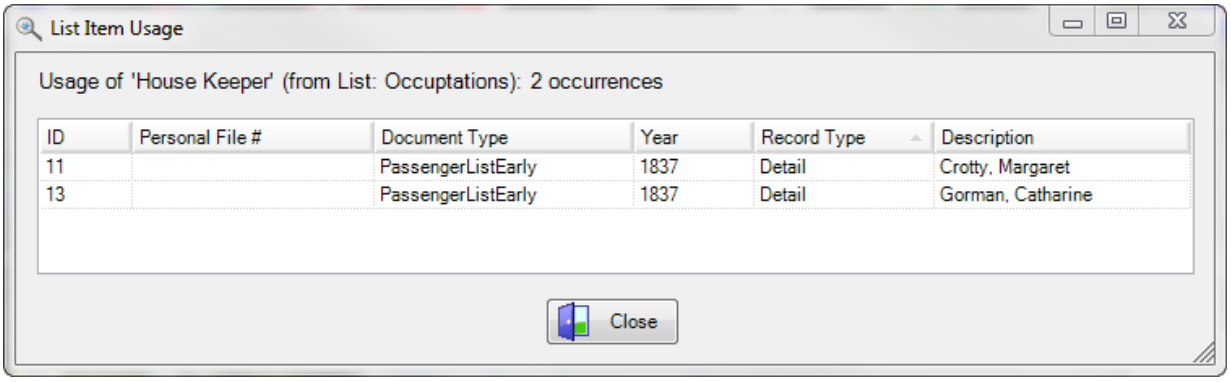


Figure 92 - Window Showing Results of a Usage Search

If you select more than one list item, the Merge Items command is enabled. When list items are selected to be merged, a small window will pop up to let you choose which of the duplicate text fields should be the phrase or name used for all the data locations currently filled with any of the items selected for merger. Pressing Cancel would undo the merge operation.

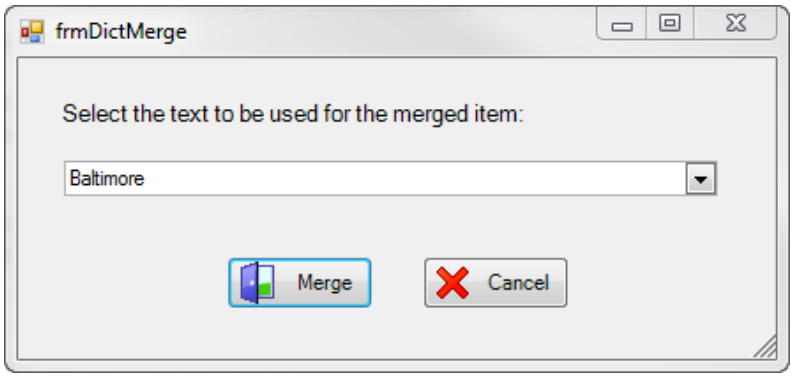


Figure 93 - Text Selection Window for Merged Items

Reports

The Reports Menu (see Figure 94) allows you to select the type of report you want to generate. The choices are similar to other choices in Clooz: People, Businesses, Buildings, Censuses, Census Substitutes, Documents, Images, and Sources. You can print a report of all people, all censuses, all census substitutes, all documents, all images, and all sources, or you can print "selected" versions of the same choices (i.e., all censuses for 1840), or you can print a "select" report of an instance of the above choices (i.e., the 1840 census from Detroit, MI, containing the Dohertys). You can also print a report for one document from that particular document's form.

There are various choices under the Reports Menu that allow you to filter your reports how you would like them to appear. The Help menu will take you to Clooz Help, will allow you to connect to various pages on the Clooz website, and will take you to a screen that gives you information about Clooz, including the version number and serial number.

People

- All People in Clooz, sorted by ID, Alternate ID, or Surname
- Selected People in Clooz, sorted by ID, Alternate ID, or Surname
- An individual, showing all documents (or just the primary documents) that person is linked to

Businesses

- All Businesses in Clooz, sorted by ID, Alternate ID, Name, or Owner Name
- Selected Businesses in Clooz, sorted by ID, Alternate ID, Name, or Owner Name
- A business, showing all documents that business is linked to

Buildings

- All Buildings, sorted by Building ID, Address, City, Township, County, State/Province, Country
- A specific building with linked people, or with linked businesses, or with no people or businesses

Censuses

- All Censuses by Year, Personal File #, Surname, Country, State/Province, County
- Selected Censuses by Year, Personal File #, Surname, Country, State/Province, County
- A specific census

Census substitutes

- All Census Substitutes by Event, Personal File #, Year, Surname
- Selected Census Substitutes by Event, Personal File #, Year, Surname
- All Directories by Country, State/Province, County, Town- ship, City
- Selected Directories by Country, State/Province, County, Township, City
- All Tax Records by Country, State/Province, County, Township, City
- Selected Tax Records by Country, State/Province, County, Township, City
- A specific census substitute

Documents

- All Documents by Event, Personal File #, Year, Surname
- Selected Documents by Event, Personal File #, Year, Surname
- A specific document

Images

- All Images by Image #, Event, Subject
- Selected Images by Image #, Event, Subject
- All Maps by Image #, Event, Subject
- Selected Maps by Image #, Event, Subject
- All Photos by Image #, Event, Subject
- Selected Photos by Image #, Event, Subject
- All Photos with People by Image #
- Selected Photos with People by Image #, Surname
- A specific image

Sources

- All Sources by Title, Author/Creator, Source Type, Location
- Selected Sources
- A specific source

Research Logs

- All Research Logs by Log ID
- Selected Research Logs by Log ID, Surname
- A specific Research Log

Selecting a Report

1. Click on *Reports* from either the Clooz explorer bar or the Clooz menu bar. You can also print a specific report from any form in Clooz.
2. From the Clooz Report screen, select the category for the report, ex., People, Censuses, Images.

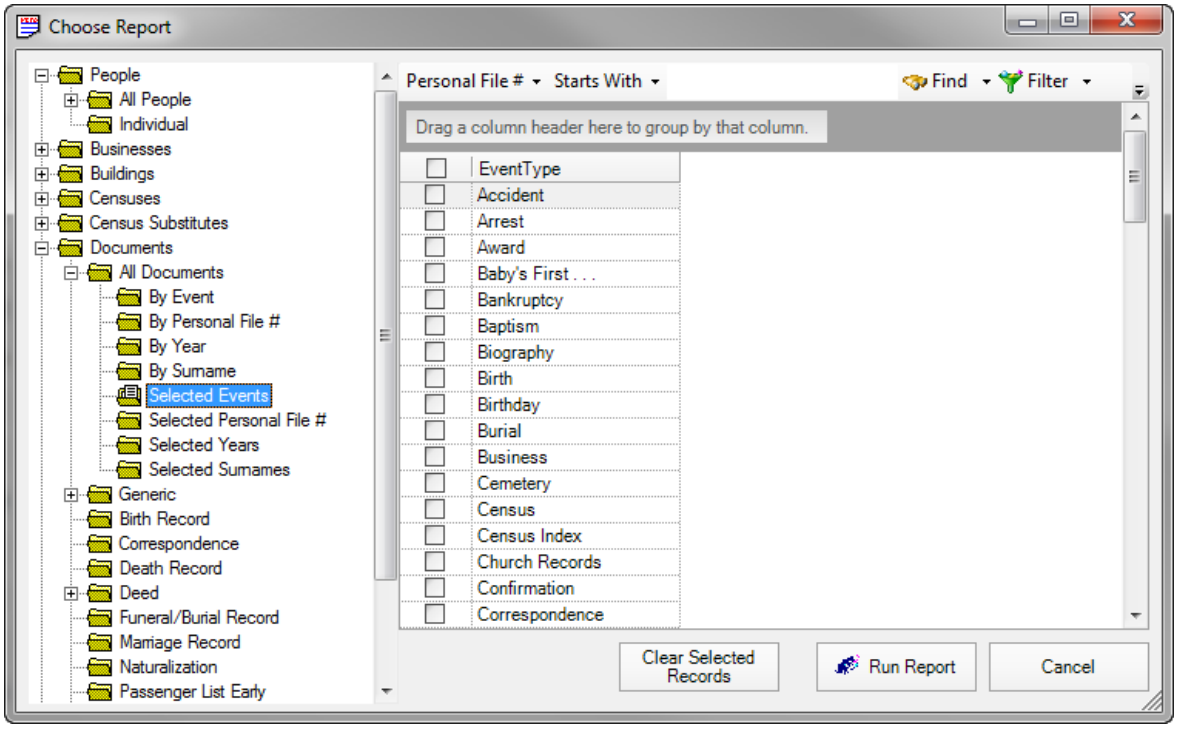


Figure 94 - Report Selection Form

3. If a + sign is next to an item, click on the + sign to open up that category to see the choices available. A grid with column headings appears on the right side of the screen.
4. If you choose one of the *Selected* type of reports, you can choose which items to include on the report by clicking in the check box next to each item. To clear the selections, click on the ***Clear Selected Records*** button.
5. If you want to see a report for one individual, click on People and then Individual, or choose that person from the People list on the Clooz Explorer Bar, and print the report from that person's form. The list of all of your people will be in the grid on the right. To find someone quickly, use the Search bar above the grid area. For example, with the *Starts With* condition selected, enter some text and press Enter. You will jump to the first record beginning with those letters (in the field designated for the search). Once you've found the person, highlight the name and click on the ***Run Report*** button, or double click on the person's name to run the report.
6. Once you find the report you're looking for, click on the ***Run Report*** button. Generation of the report may take a few seconds. Your report will be shown on the screen once it's generated.
7. When the report appears on the screen you will have several options available on the toolbar, as shown in the next Figure.

Viewing a Report

Once you have clicked the *Run Report* button, the report will be generated and displayed in a viewer window. Some reports take a few seconds to be generated, depending on the specific report selected.

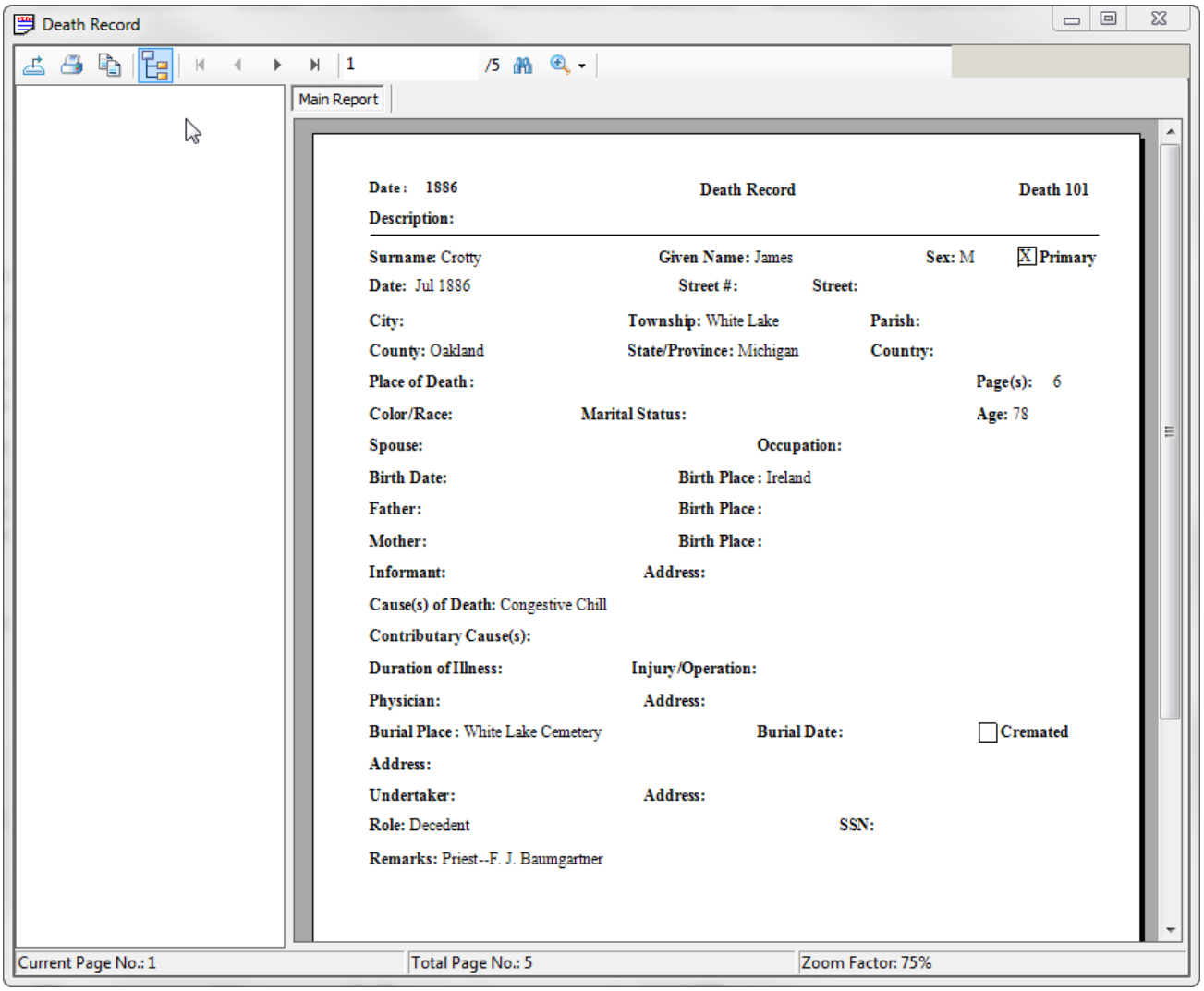


Figure 95 - Report Viewer Window

The Report Viewer window, like the main Clooz program window, will appear at the same location, size, and state as it was when last closed.

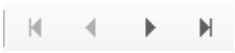
The Toolbar at the top of the window provides a few functions to work with the report.

The first option on the left is the Export option. If you select this option, you can export your report to the following formats: Adobe Acrobat (.pdf), Crystal Reports (.rpt), Microsoft Excel (.xls), Microsoft Word (.doc), Rich Text Format (.rtf), and XML. Clicking on the export icon will open a dialog box to select a filename (and location) to contain the exported data. The format of the file can be changed by using the drop down list at the bottom of this dialog box.

The Print Report button calls up a printer dialog box, where you can change printer settings and then send the report to the printer. The default paper size in Clooz is Letter. If you live in an area that uses A4 paper, you will need to change the paper size in your printer's settings. Most of the reports in Clooz are laid out in landscape format. Some print on multiple pages wide. Some are laid out in landscape mode on legal- size paper (8 1/2" x 14"). You will be warned if you need to load legal paper for a report.

The third option is for copying selected text to the clipboard. If you highlight a selection of text directly on the report, pressing this button will copy it, and then you can use the paste function to insert it in another program document, such as with Microsoft Word. The layout format is not maintained, but the order of appearance is.

The fourth option, the tree toggle, shows the groupings for a report. It is only useful to you if you want to see, on screen, a particular grouping.



The next set of options take you, respectively, to the beginning of a report, to the previous page, to the next page, and to the end of a report, if your report is more than one page.

The next box shows you what page you are on and the total number of pages for the report.

The binoculars allow you to search for text within the report. If the text is found, it is highlighted.

The final option is a zoom setting. You can change the size of the report on your screen from this drop-down list.

Exporting to Other Programs

Clooz currently supports two ways of exporting information to the database files of other genealogy programs, either using the Data Transfer Manager or the Document Export function (added in Clooz Version 3.3). The Data Transfer Manager is more limited in the types of data that can be imported or exported (individuals and sources), but can perform bulk operations. The Document Export function has a very extensive ability to export essentially any type of data in Clooz, but only applies to one document at a time. Each will be covered separately in the following sub-sections.

Clooz uses two methods for interfacing with the various other program databases. One is by directly reading and writing to the external database file. The main advantage of this approach is it provides for a stronger linking or synchronization between Clooz and the other program. Clooz can track the RIN (record identification numbers) in the other program for individuals who have been linked. For those programs not providing direct read and/or write access to their files, Clooz will import and/or export using a GEDCOM file as the transfer vehicle. In those cases, this GEDCOM file must be merged into the external program using its own import or merge capability. This could likely result in duplicate individuals in the external program, and thus the program's merge capability is required to eliminate the duplication. The actions required for each program will be discussed later. The following Figure identifies the external programs Clooz interfaces with and the methods used to import and export data.

Program	Import Method	Export Method	Linking of RINs
Legacy Family Tree	Direct Read	Direct Write	Automatic
RootsMagic	Direct Read	via GEDCOM	Semi-Automatic
The Master Genealogist	Direct Read (via Genbridge)	via GEDCOM	Not updated for Exports, TMG family structures not read
FamilyTreeMaker	via GEDCOM	via GEDCOM	Not updated for exports
Family Historian	Direct Read	Direct Write	Automatic

Figure 96 External Programs Supported by Clooz

Exports Using the Data Transfer Manager

Exporting data with the Data Transfer Manager is very similar to the methods used in importing, except the selections are made on the Clooz list (right side of Data Transfer Manager), and the Export button is used.

In the following example, suppose you want to place the Crotty family in Legacy. The first step is to check off the records we want to export.

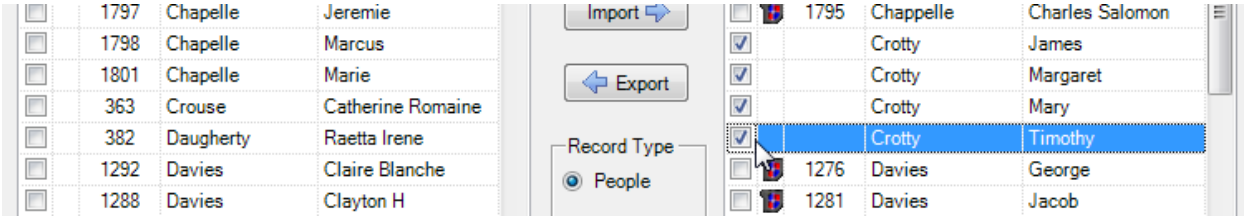


Figure 97 - Selections Made for Exporting

You then click on the *Export* button. Clooz displays a confirmation message, and you click on *Yes*.

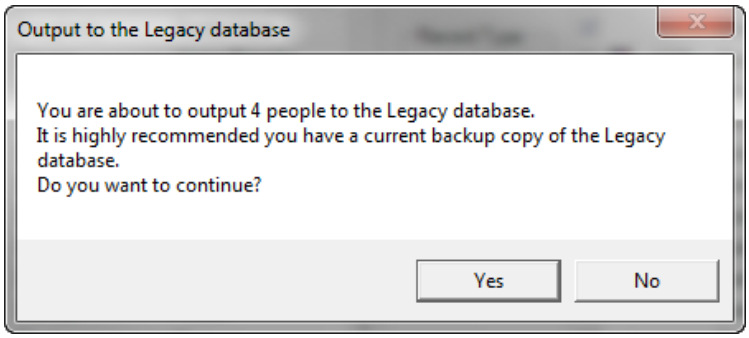


Figure 98 - Export Confirmation Message

Clooz then performs the export operation. When completed, the ID or RIN values that Legacy created for the new records are now shown on the Clooz lists.

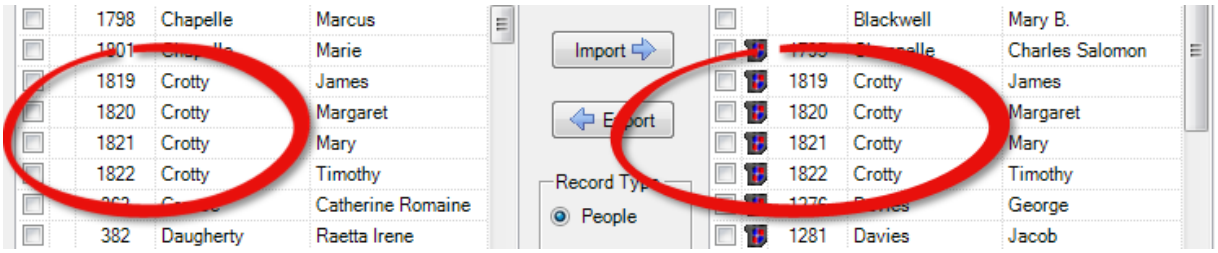


Figure 99 - Updated Lists after an Export

Exports Using the Document Export Function

The Document Export capability was first implemented in Clooz version 3.3. Using this feature you can export any of the individual items appearing in Clooz grids and the Composite View. You can therefore export an individual person, source, or repository, even though we have called this the Document Export. It gets its name from its powerful ability to output nearly all of the information in a Clooz document, transforming the information into various events in the other program for the people involved based on the information contained in the document.

Unlike the Data Transfer Manager, where you designate the database to be used when you use the feature, the Document Export function always exports the selected Clooz data to the external database currently designated as "Primary" in the External File Links view. **Therefore, you must ensure that the database you want to export data to is listed in the External File Links view, and has a check mark before the "Set as Primary" command in context menu (right-click).** The file designated as Primary will appear in bold font in the list of files. If the database you wish to export data to is not in the list, simply click on the option in the External File Links Explorer Bar group to open a database of the appropriate type. When the Data Transfer Manager appears, simply close it unless there are tasks you wish to perform there in bulk. Exports designed to create events in external databases can only be done on a single document basis though, using the Document Export function.

Whenever an external database is designated as Primary in the External File Links list, an additional menu command (Export Item) is added to the context (right-click) menu for all of the grid and Composite View displays. Click on this command to begin the Document Export process.

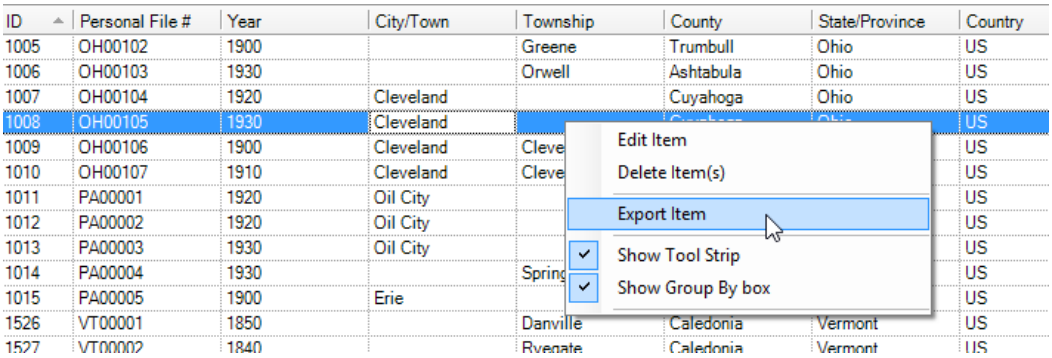


Figure 100 - Context Menu with Export Item command

The Document Export form will appear when you click on the Export Item command after right-clicking a document of any type. It is on this form where you can select which people (and their individual events) get exported, as well as edit the information to be saved in the other database. When everything is reviewed and determined to be what you want to export, you click the Export button, and then follow the procedures required for that particular database type.

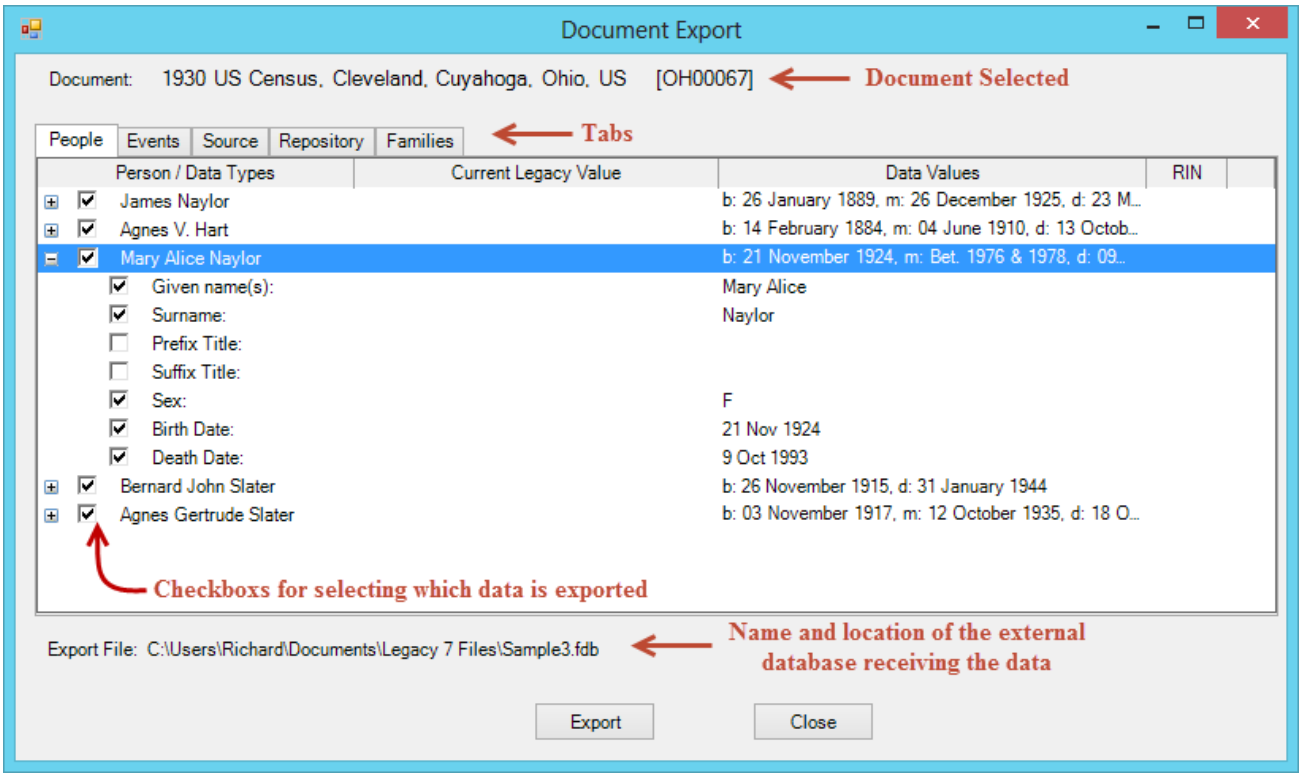


Figure 101 - Document Export Form

The Document Export form contains five different pages of data, which you select by clicking on the appropriate tab.

People Tab

The People tab (selected in figure below) on the Document Export form shows the page of information about the persons linked to the document being exported. It will contain the same list of people that you would see when viewing the document template. You can select which people are to be included or excluded in the export using the checkbox in front of their names. The names that appear in this list are the common forms of the names assigned to those people in their main records. It is not necessarily the same name or spelling that was used in the document (that will show up later in the Events page). Expand a person's record by clicking on the small plus sign in the far left column. Each of the name components, sex (if determined by this particular document), and the birth/death dates contained in the persons main Clooz record can be included in or excluded from the export using the checkbox on each line. The data itself can be edited by clicking on the item in the Data Values column. It is important to note that any changes to the data values in the Document Export form will not be saved back in the Clooz database. It is only a means to adjust the formatting of data values to better suit display in external program. Date values will be displayed in a format supported by the external program.

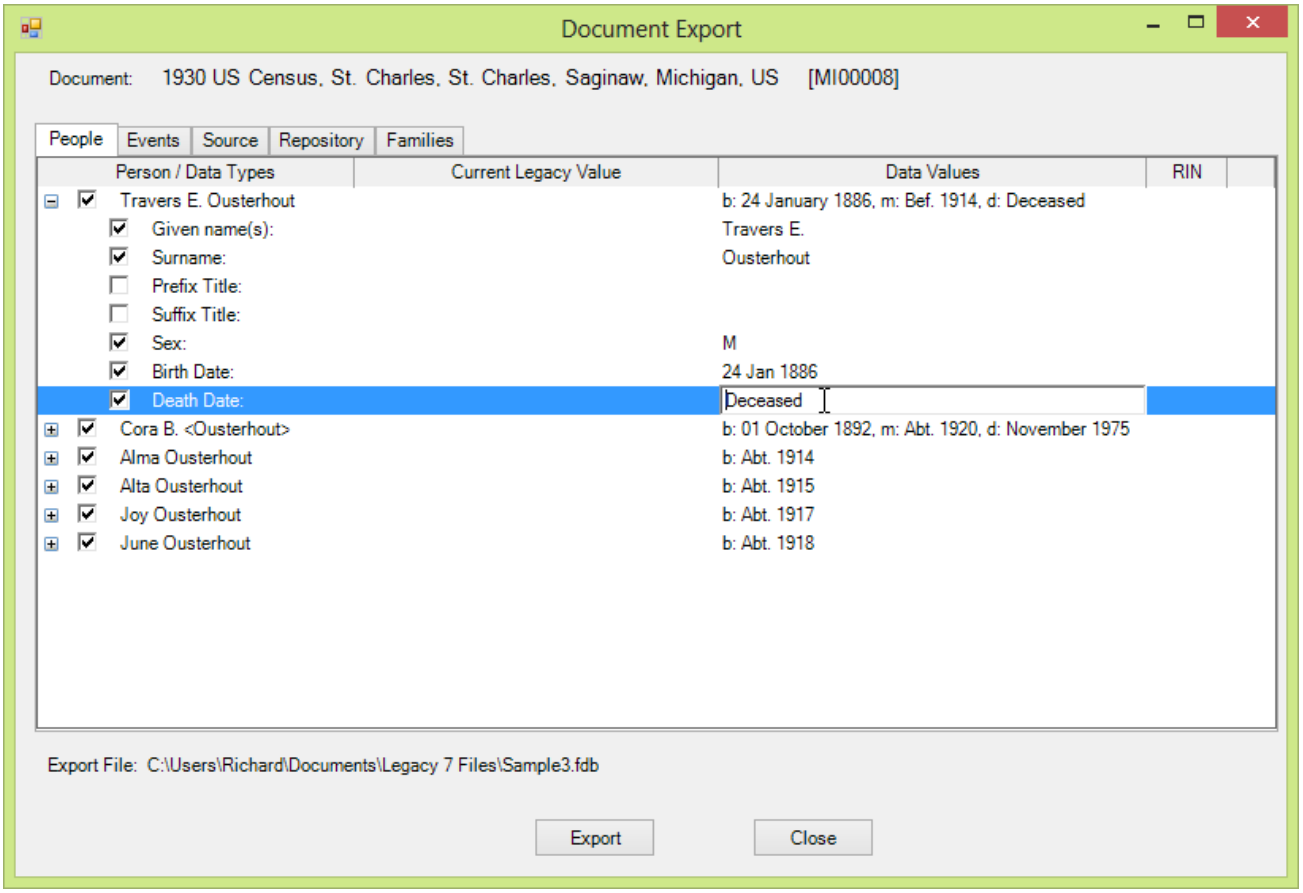


Figure 102 - People Page with Data Value Editor

The record identification number (RIN) of the record in the external database can be edited on this page during the export process when the external database type is one that Clooz directly reads. The RIN column value would appear on the top level line for each person (where their name and summary of vital dates appear, not on the individual data component lines) if the person in Clooz was previously linked to a record in the other database (prior to beginning this export). In such a case, the RIN field is not editable, and if you believe it to be incorrect, you would need to make any changes to the people linked to the document back in the document template, or remove the link in the Data Transfer Manager. This is not a trivial decision, as you may have already exported events and data for this person at a previous time. Unlinking the person in Clooz from the external RIN does not change any data or events in the external database.

A blank RIN value indicates the person is not currently linked to the external database. In this case, the field is editable. If you know a record already exists for the person in the external database, you could type it in here. Otherwise, at the time the actual export is executed, those people with blank RIN fields will have a new record created for them in the external program. You can only enter RIN values that already exist in the other database. Non-existing RIN values will be ignored during the export, and treated as a blank. It will be more efficient if you fill in as many of the RIN values as

possible, since leaving it blank will result in a new person being added to the other database. If that new person in the other database is a duplicate of an existing person there (as is commonly the case where GEDCOM files are used to transfer the information), you will need to use the tools in the other program to merge the people. When you type in a RIN value, the fields in the "Current [External Program Name] Value" column will populate, and permit you to compare the person's current data in the other database with the data you intend to export. By default, the checkbox will be turned off for data fields where data in the other database is already stored. The Clooz data for that item will not be exported unless you manually check the box.

When displaying the main People grid or Composite View in Clooz, and a right-click Export Item is selected for that person, the same Document Export form will appear, but only the People tab will be visible. This is a way of exporting individual people to Legacy (similar to what could be accomplished in the Data Transfer Manager), but with more control.

Events Tab

When a Clooz document is exported, the program will scan the information entered for that document to extract data that may define events for the persons contained in the document. This is usually a one way process. A birth record (perhaps a birth certificate) entered into Clooz contains the birth date and location information for a person, so the birth event for that person can be created in Legacy, for example. However, the reverse is not true. Simply knowing the birth date and location for a person in Legacy does not permit you to create a birth certificate in Clooz.

When possible, birth events are derived from information such as age on the enumeration date of a census. In such cases it is up to you to make the decision as to whether such information should be exported or not. To assist your evaluation, positioning the mouse cursor over the birth date will provide a hint popup that tells what the basis for the determination was (see figure above). In any case, exporting vital events to Legacy will not overwrite any vital event information already existing there. If a birth date or location has already been entered, this new information will be added as an alternate value (e.g., Alt. Birth).

Clooz version 3.3 can extract information from the census data and document types that have well defined fields in the template, and the information contained in them can be anticipated with a reasonable degree of certainty. However documents such as the Generic Document template which could contain the most significant information in the free-text remarks area should not be expected to create all the events a human might interpret from the data. It is only meant to get you started by handling the "easier" determinations.

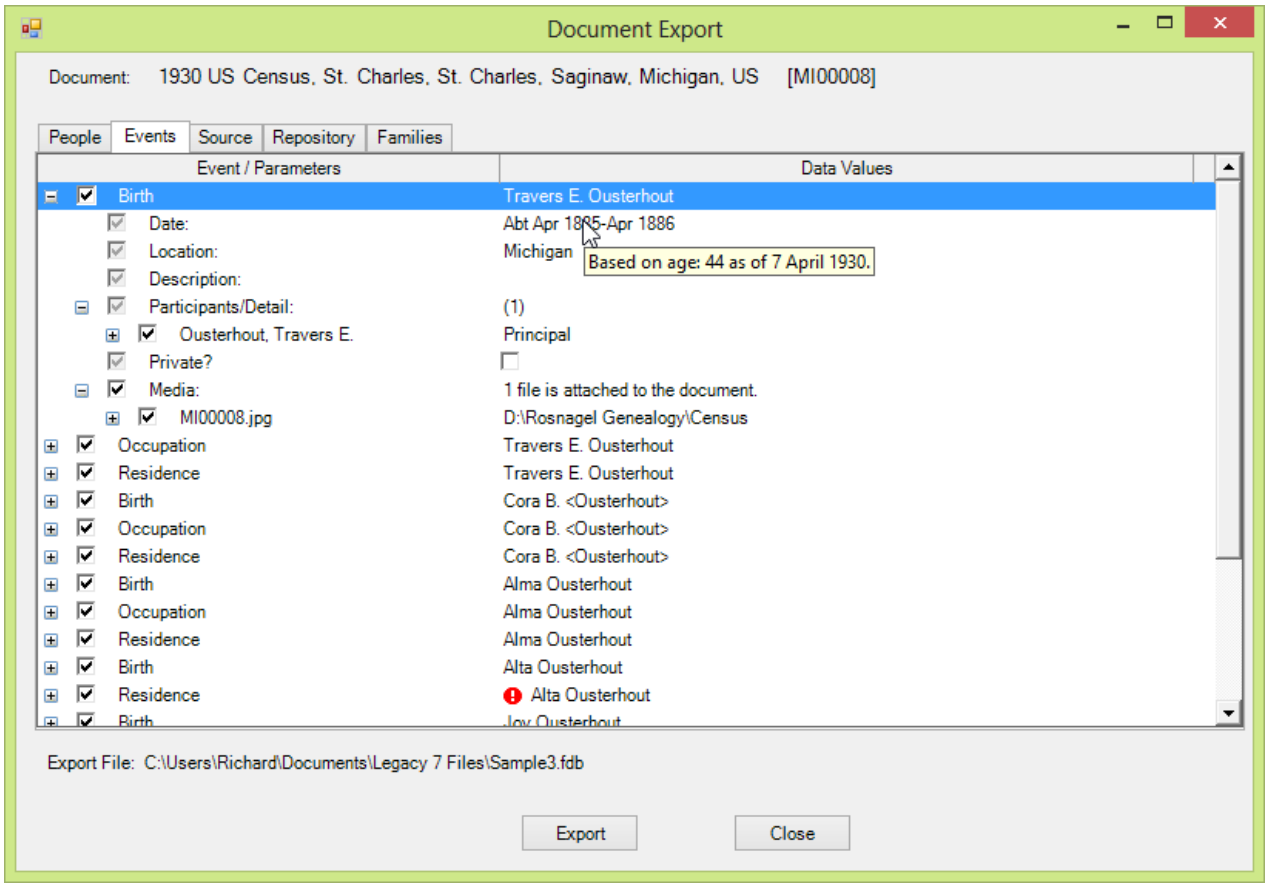


Figure 103 - Events Tab

When possible though, Clooz can create any of the following event types in an external database from the Clooz document types listed:

- Birth (birth records and any documents providing an age as of some date)
- Marriage (marriage records)
- Death (death and burial records, mortality censuses)
- Funeral (burial records with funeral field filled in)
- Burial (death and burial records)
- Occupation (documents providing an occupation or profession field)
- Religion (censuses with a religion field)
- Residence (documents providing a street address)

- Immigration (documents providing an immigration year)
- Naturalization (naturalization records)
- Census (census documents)
- Social Security Number (social security records)
- School (school directories)
- Deed (deed records)
- Land (farm directories, tax records, Irish Valuation/Tithes)

You may have noticed the red icon in the figure below beside "Alta Ousterhout." This signifies there is a problem within her data. For instance, when there are problems formatting dates with peculiar content, the icon will appear to draw your attention to the situation. Typically, this will either involve misspelled month names (or abbreviations) or not having a space separating letters and numbers. Positioning the mouse cursor over the field will provide an explanation of the reason for the alert. Once the typo in the date has been corrected, the alert should disappear.

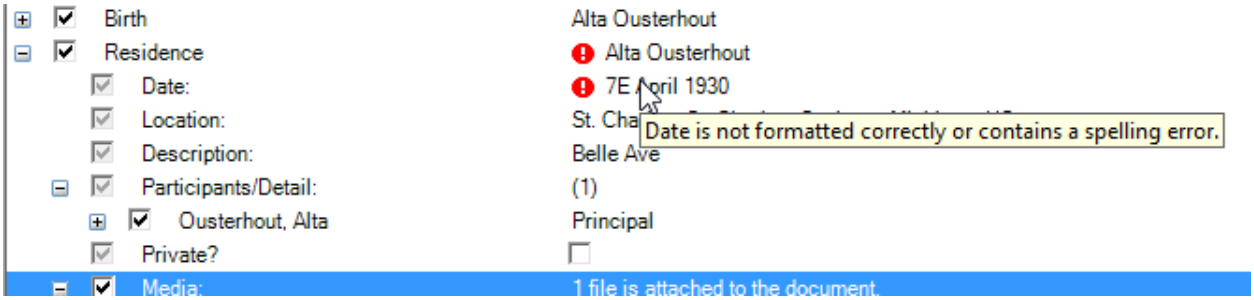


Figure 104 - Alert Icon for Problem Situations

The next important concept with the Events tab is the event participants group. For most Clooz document types, the details forms apply solely to one of the people linked to the event (which is the case with all censuses). However some document templates (notably birth record, marriage record, death record, deed, funeral/burial record, naturalization, and generic documents) have a checkbox indicating whether that person is a primary (sometimes called principal) person for the record (in other words, the event associated with that document is focused on them).

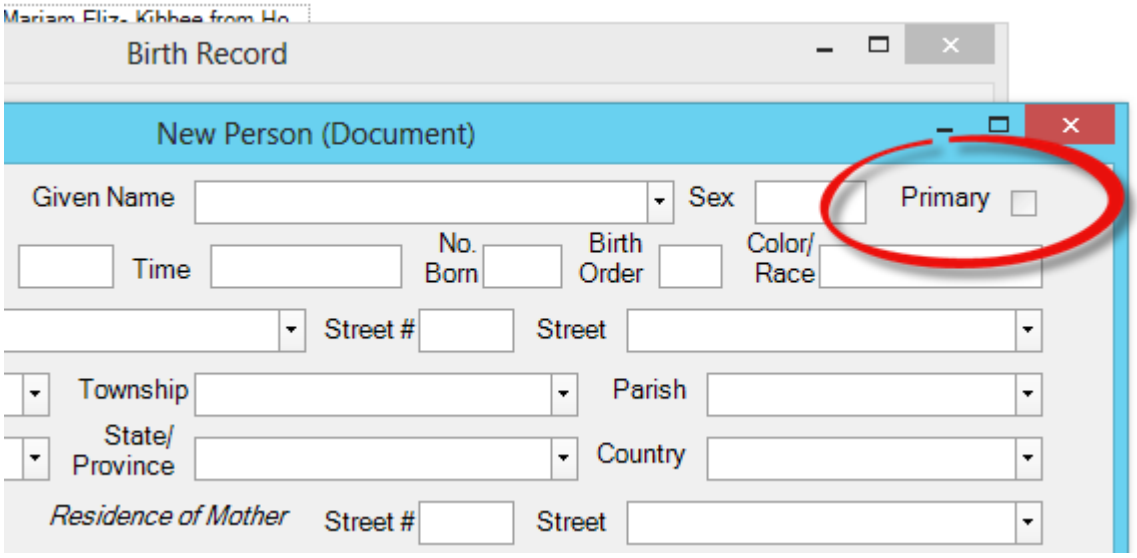


Figure 105 - Document Template with Primary Field

In the case of a birth, the Primary person is the newborn infant. However, in earlier versions of Clooz, this field was not well defined, and only was used to control whether the record appeared in certain report formats. Therefore, it is quite possible you have had a different interpretation, and had multiple people in a document with the field checked. Likewise, you may have only checked the Primary box for the infant, but were entering a list of infant births found in some register book. To handle these cases, when you select to export a document of one of these types listed earlier, and more than one person is declared Primary (two for marriage records), a special form will pop up to allow you to specify how you want the people to be handled.

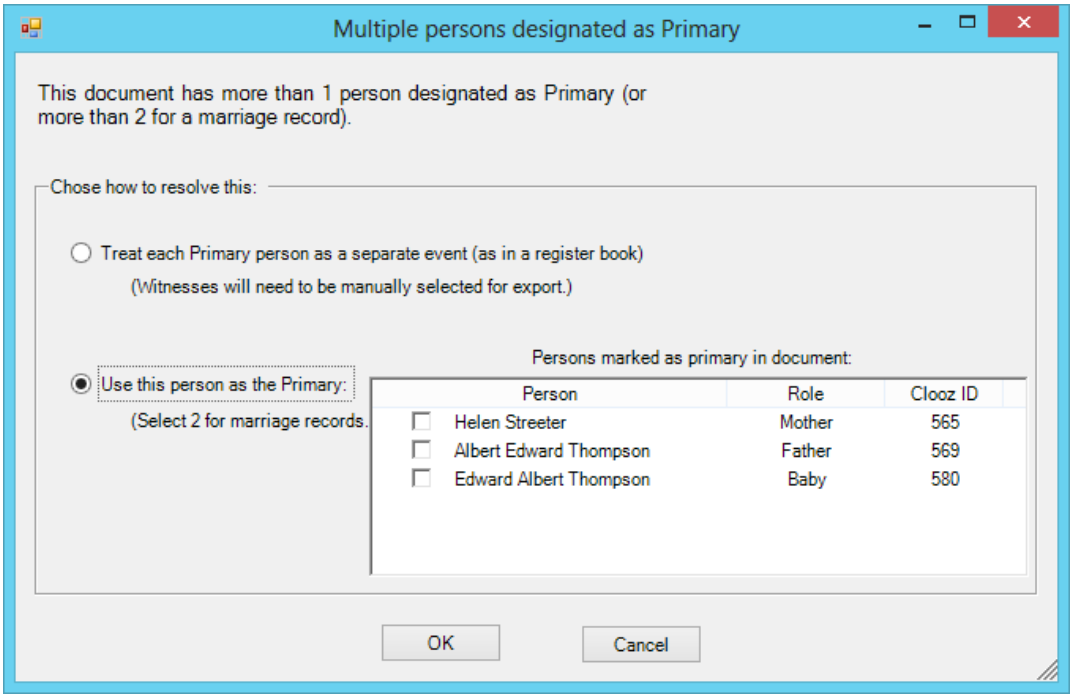


Figure 106 - Form to Clarify Multiple Primary Persons in the Document

In our birth record example, you would normally use the lower option and check the box associated with the person born. If it was a register type document and all the primary people do have their own birth information in the document details, then select the upper option. If you have a mix, then you may need to export the document multiple times, each time selecting a different baby. Alternatively, you could check the upper option and then in the Events Tab, uncheck the birth events generated for what normally would be witnesses. A witness here would be any person having a role in the event other than the primary person(s).

When exporting events to Legacy 7.5 or earlier, Legacy does not support the concept of witnesses, so Clooz will only enter information about the event for the primary person(s). However, beginning with Legacy 8, Legacy is supporting the concept of shared events, where the "owner" of the event in Legacy is equivalent to the Primary person in Clooz, and the witnesses will tie in (or "share") that event along with a designation of their role. Clooz 3.3 will setup all of the witness sharing when exporting to Legacy 8. Otherwise, shared events / witness roles can be export to RootsMagic, TMG, and Family Historian. FamilyTreeMaker does not support shared events.

In the case of all other Clooz document types, such as censuses and census substitutes, Clooz will treat all of the people linked to the document as primary. Each will get their own event in Legacy, whether they had the role of Head, Wife, Son or Daughter, etc.

In many cases, especially with censuses where all family members are listed, a summary of useful information is added to the event in the Notes field. So in a census family, each person would have this summary in their census event notes (as shown in Figure 107). This is editable in the Events Tab, by expanding the lines under a person. You can also see the Alternate Name or AKA field, which contains the name of the person as it was entered on the document. Like any element, if you do not want an AKA entry for each document you are exporting, just uncheck this box. But if you do, there will be no record of what the actual form/spelling of the name was for the person in that document (except perhaps in the Notes).

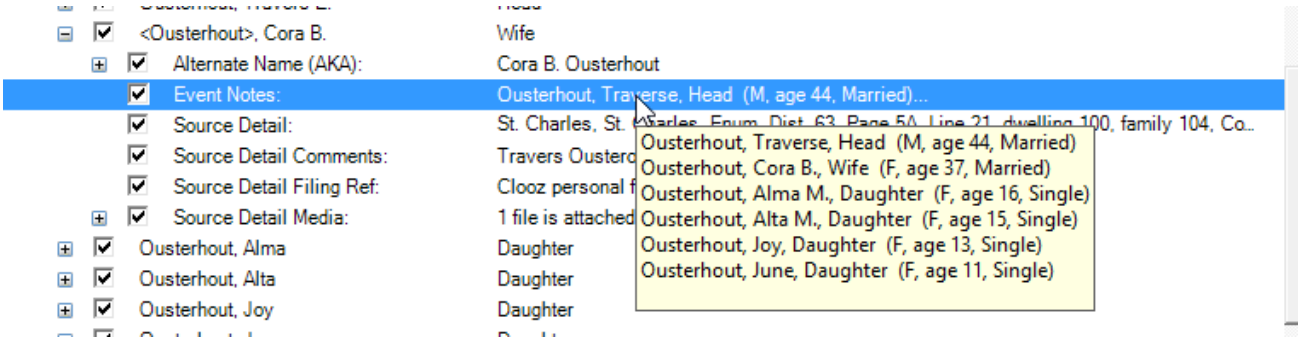


Figure 107 - Additional Entry Lines for Each Person in an Event

Finally, the lines of data comprising the Source Detail (what links the event to a Master Source) are available for any last minute cleanup or reformatting. Any digital images you had attached to the document in Clooz will be listed under the Source Detail Media, which can further be expanded to edit the captions and description fields. These are typically automatically filled with the filename for the file and any description that had been entered into Clooz. The same media image links are also

setup in the external database for the event (see Figure below). Most programs only use links to the image on your disk, no substantial duplication is occurring. Check your program manual to see if media files are duplicated each time they are referenced.

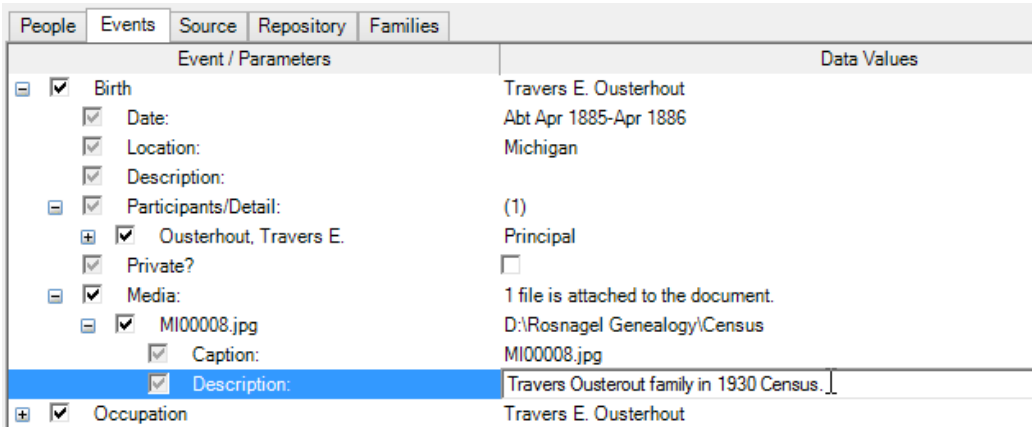


Figure 108 - Media Attached to Events

Source Tab

In Clooz, there is only one source per document. This source, assuming you are following best practices and have entered one, is contained on this page for editing.

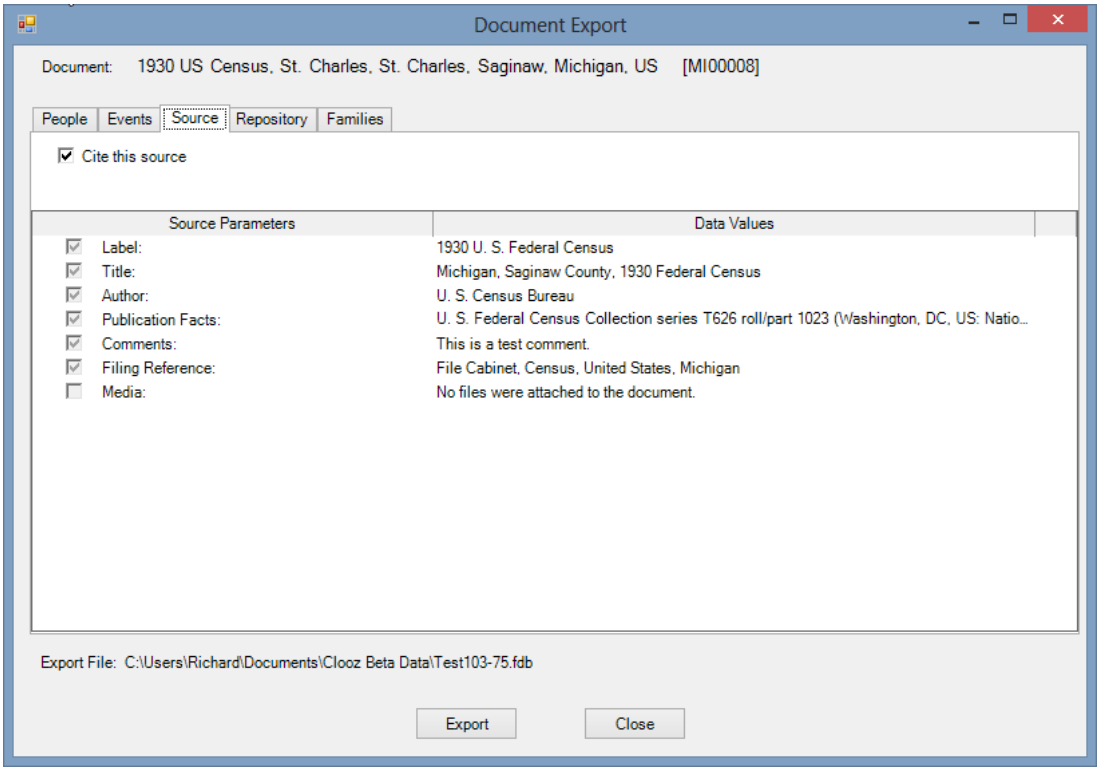


Figure 109 - Source Tab

The checkbox labeled “Cite this source” controls whether this source will be cited in the events that are being created in your external database. If this source in Clooz has already been linked to an equivalent external entry, an additional set of buttons will appear as seen in the next Figure. Here you choose whether to cite the events to the copy of the source already in the other database, or to create a new source record (perhaps with some modified data values). This function is only available with databases to which Clooz has direct write capability.

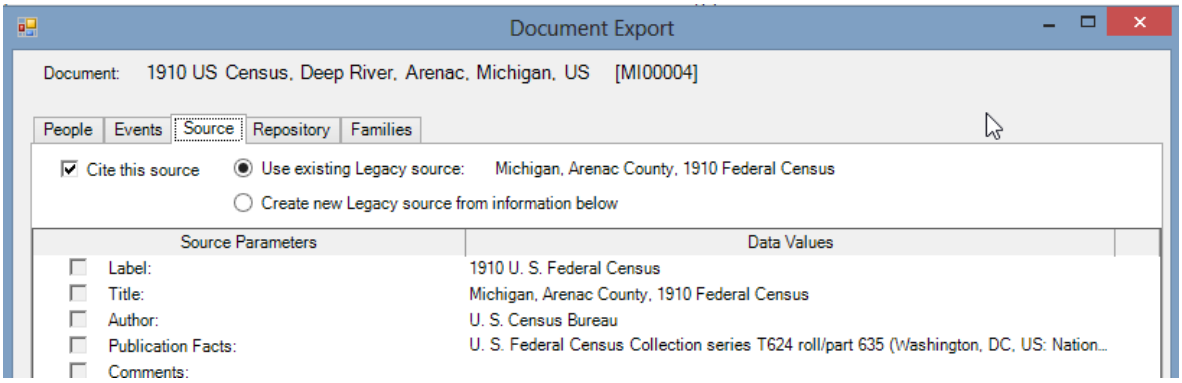


Figure 110 - Sources Already in Legacy

Like several of the remarks fields on other tabs, you will see that Publication Facts field in this source gets rather lengthy and is cutoff. When you see an ellipsis (…) at the end, hover the mouse cursor over the field to see the entire text.

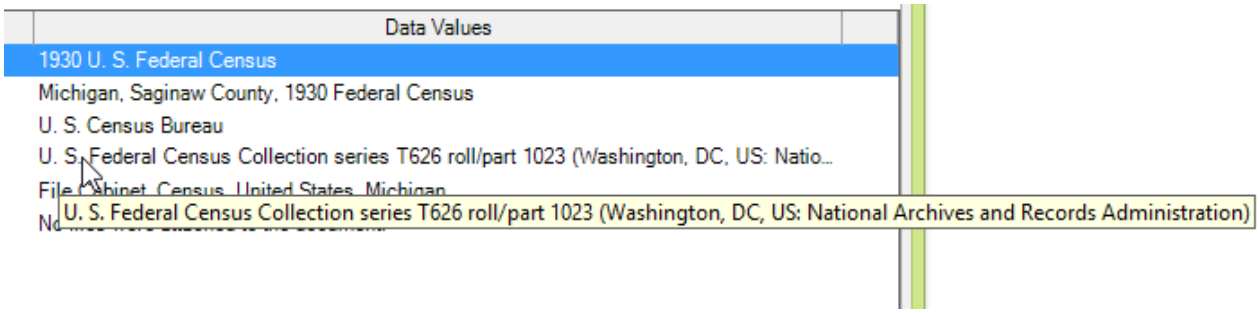


Figure 111 - Pop up Display of Full Text

When editing a field like this, you will see a button on the right side of the edit field. You can either edit the text within the normal one line text, or in a multi-line editor (which supports separation of the date into lines.

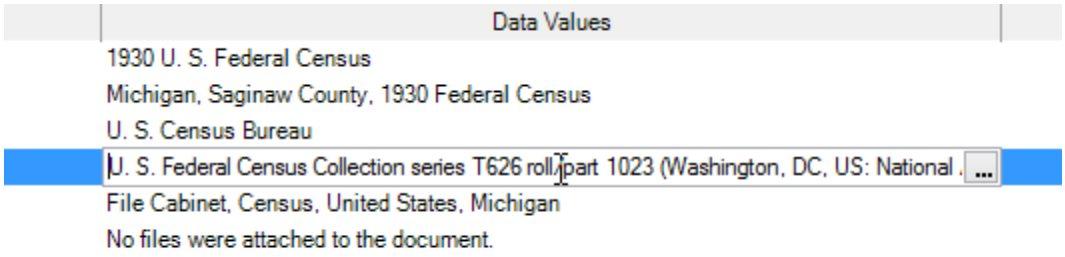


Figure 112 - Editing Data with Multi-Line Edit Button

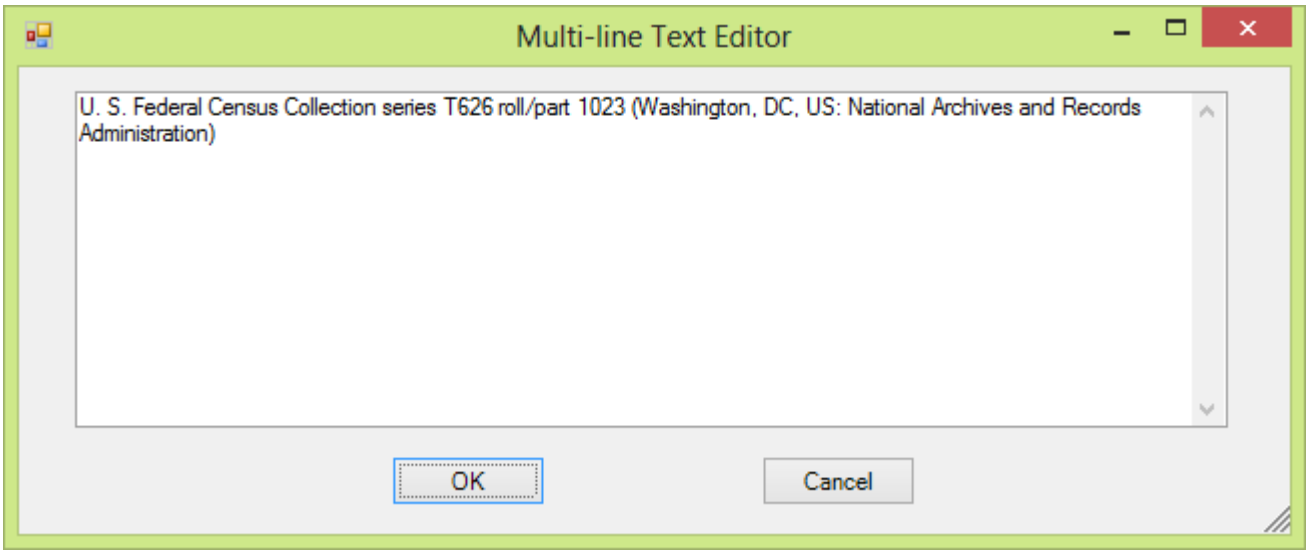


Figure 113 - Multi-line Text Editor

Similar to exporting an individual person, you can go to the list of Sources using the Clooz Explorer Bar and right click a specific source, and select Export Item from the context menu. The Document Export function appears, but only the source tab (and associated repository) will be visible. This allows you to export a single source without going to the Data Transfer Manager.

There are several options that can be set in the Options form (see Edit menu). An option is available to always cite the document's source for each person's name (whether or not it exactly matches the name in the document). The other option moves source details into the title of the source (source splitting), resulting in a larger number of sources, versus maintaining separate citation details for the various details under a fewer number of master sources (source lumping).

Note that if a document has no associated source, information cannot be entered into the source fields on this export window. Sources must be created within the standard Clooz document editing capability. The alternative would be to create the source in the target program following the export, if you don't want it to be in Clooz for some reason.

Repository Tab

The Repository tab has the same capabilities as the Source tab. You can also export an individual repository by right clicking it in the main view Repositories list. The Document Export form will appear, with only the Repository tab being visible.

Similar to the Source tab, a checkbox is provided for you to designate whether the repository should be listed with the source. If their already is a repository having the same name in Legacy, additional buttons will appear to designate whether to use that existing repository, or to create a new one.

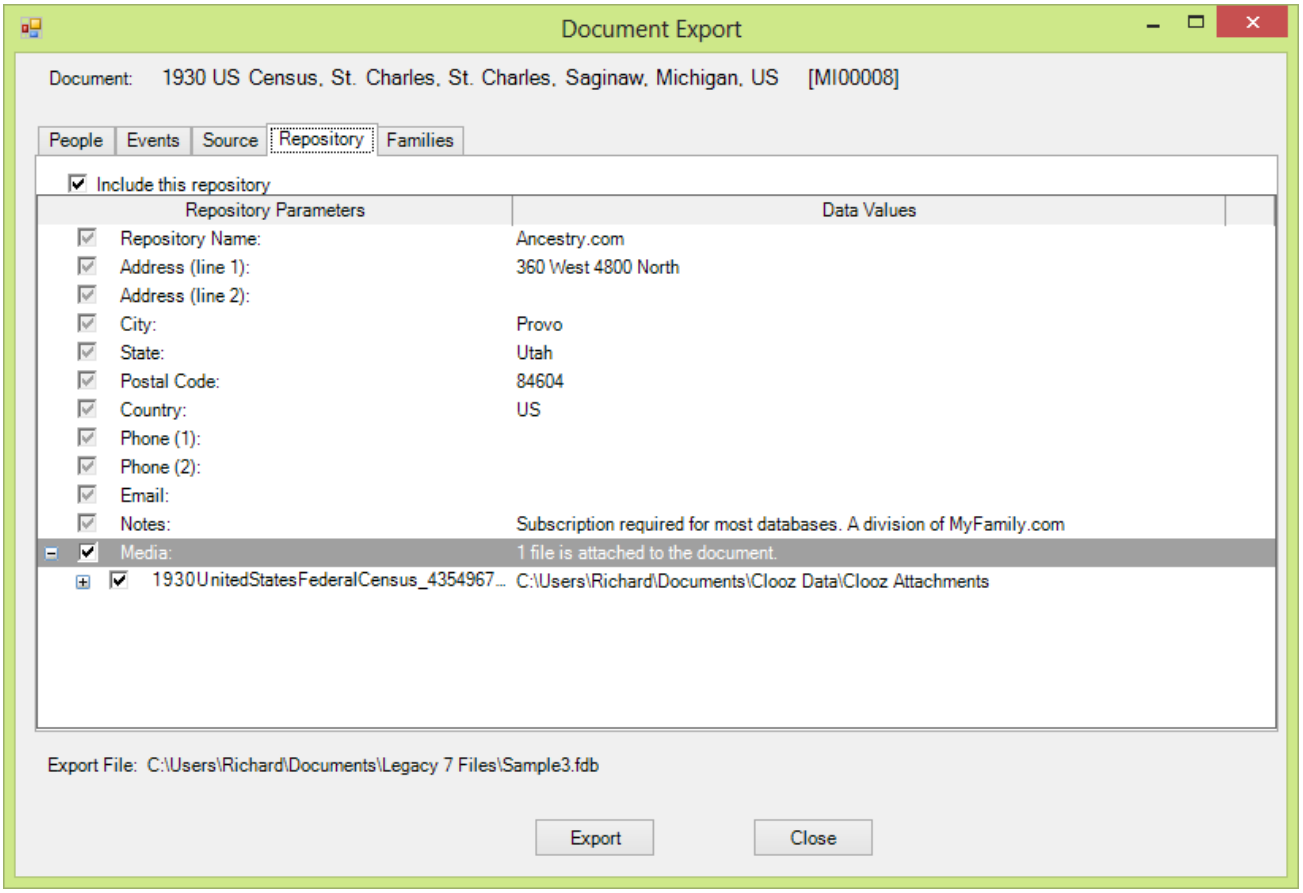


Figure 114 - Repository Tab

Note that if the document and source being exported has no associated repository, one cannot be created in this window. To add a repository, the document's source must be edited using the standard Clooz capabilities.

Families Tab

Families are somewhat a foreign entity within Clooz (which is totally document based). However, families are the critical structure in lineage based program like Legacy. When you export a group of persons to any of the family tree programs, you would then have to establish any parent-child relationships applying to the group's members. So Clooz attempts to minimize the labor required by assisting you in establishing parent-child relationships that are to be formed by the export. Be aware though that any families you "create" in this tab of the form are not retained in any way by Clooz. They only get saved in the external database (not in Clooz).

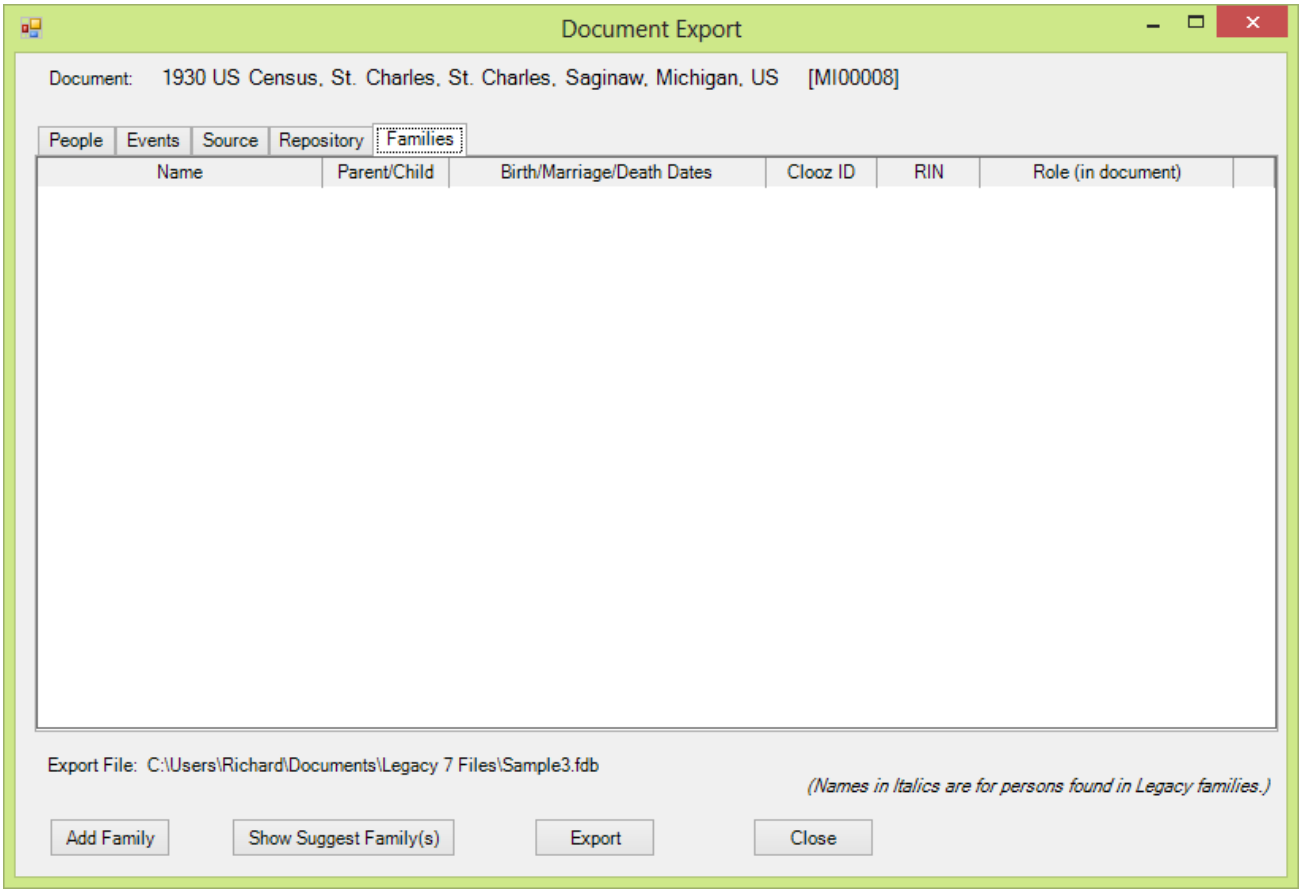


Figure 115 - Families Tab

In most cases, when you export a document, when you come to the Families tab it will initially be blank (unless some or all of the people in this document are already linked to Legacy persons that are already part of families). The two important buttons here are the Add Family and Show Suggested Family(s) buttons.

When the Clooz document presents families in a rather consistent way, such as in censuses, the software will attempt to determine family groups. In censuses, this is done by ordering people into page / line order, and then starting a new family with each "Head" person. This will work properly most of the time, but it does remain the user's responsibility to review such output before exporting. When the Show Suggested Family(s) button is clicked, the suggested families are displayed on the page (see Figure 116).

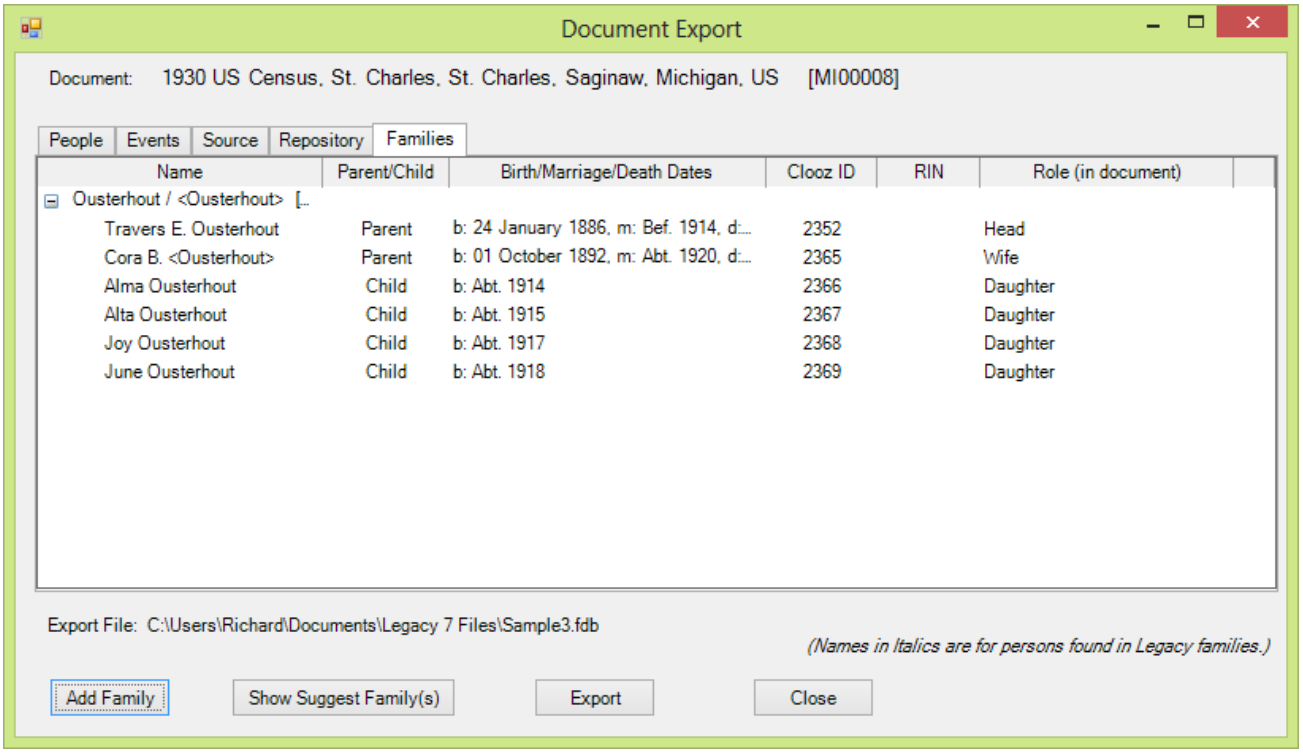


Figure 116 - Suggested Family for Export

In this case it worked perfectly. To perform this function manually, use the Add Family button, which provides a table for selecting which people belong in the family, and whether they are a parent or child. Only two parents are allowed, and child must mean son or daughter. If a grandchild appears in the census group, a second family must be started with that child and his/her own parents. This, like most of the external programs, only provides a way of saving parent-child relationships.

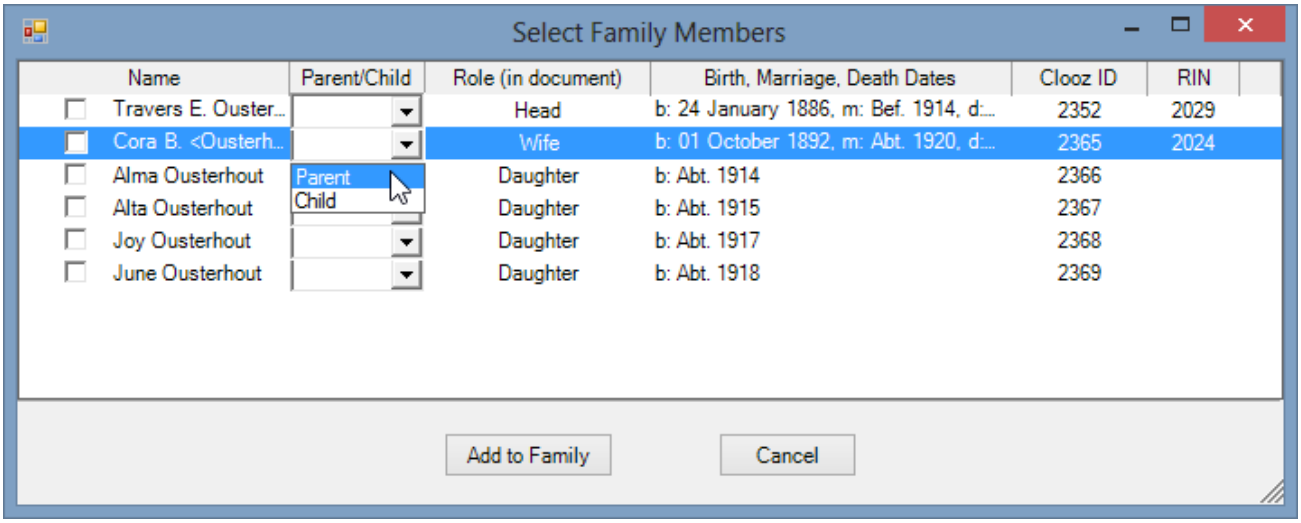


Figure 117 - Select Family Members

Finally, if one or more members of the people being exported already are linked to a person in another database, and they are already established in a marriage or parent-child relationship, they will appear on the Families Tab when it is first displayed (in Italics). Any other family members from the other database whether in the list of Clooz people or not will also be displayed (in Italics). Relationships existing in an external database cannot be changed or deleted by Clooz. Once a parent-child relationship is established in the other program, you would need to use that program to modify them.

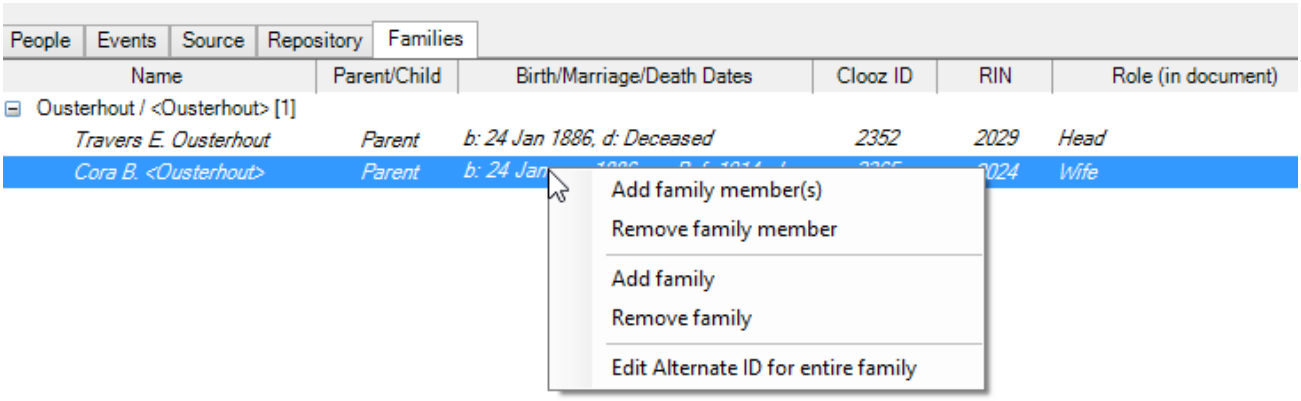


Figure 118 - Context Menu on the Families Page

The context menu (right click) on the Families Tab provides a way to add one or more family members, or to remove family members, or even entire families.

The *Edit Alternate ID for entire family* command provides a method to enter a single Alternate ID in Clooz for each member of the family, as a group. This is for users who use the Alternate ID field to designate different family groups.

Program Specific Export Procedures

Clooz transfers information to and from the external program files by the best method available. In some cases, it is by directly reading and/or writing to the other data files, and in other cases, using GEDCOM files as the transfer mechanism. GEDCOM files require users to perform specific import or export actions in both Clooz and the other program. The following sections describe the actions necessary when Clooz is linked with the various programs.

Legacy

Clooz interacts directly with the Legacy database (set as Primary on the External File Links list), therefore no special actions are necessary. All changes to the Legacy database are made automatically once the Export button is clicked on the Document Export form.

RootsMagic

Clooz directly reads information from the RootsMagic database (set as Primary on the External File Links list). However, Clooz is not authorized to write directly to the same database. Therefore, a GEDCOM file is produced by Clooz for the user to import into RootsMagic.

Immediately after clicking the Export button on the Document Export form (or Data Transfer Manager form), you must first select the name of the GEDCOM file which will be created to contain the exported information. To simplify normal use, you might always use the same file as your export GEDCOM, overwriting the old file with each new export. Just complete the import into RootsMagic before overwriting this GEDCOM file in a subsequent export operation.

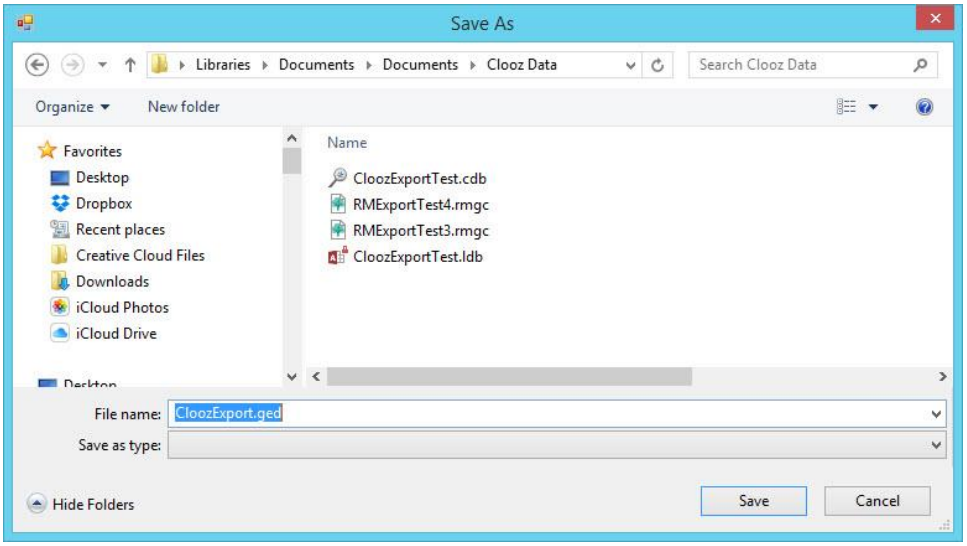


Figure 119 GEDCOM Export File Designation

At this point, a GEDCOM Export Status window will appear. Clooz will stop and wait at this point for you to perform the import of the file you just created into RootsMagic. You will get the best results by completing the import before proceeding in Clooz, as this will then let Clooz see the resulting record identification values for the new data in the RootsMagic database. If you do the import later, Clooz will show question marks for the RIN values until the RootsMagic import is complete, and the RootsMagic database has been opened by Clooz to perform another import or export. Clooz does not continually monitor the RootsMagic database for changes.

You can view the list of export actions performed (important when warnings or errors have occurred) by clicking the View Log File button.

Figure 120 GEDCOM Export Status

Once the import (and data merger) has been completed in RootsMagic, click on the completion button on the GEDCOM Export Status window. Clooz will then complete its own actions to determine the new RIN numbers RootsMagic has just assigned.

As a quick review of the import operation in RootsMagic, the first step is to click on the Import… command in the File menu of RootsMagic. The file selection window will appear.

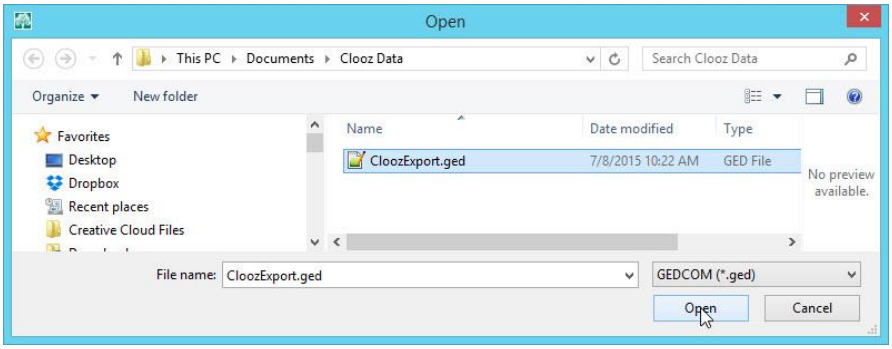


Figure 121 GEDCOM File Open Window (RootsMagic)

Select the GEDCOM file created by Clooz, and then proceed to click on the Combine Into This Database button and whether to enter a source (recommend No so long as the Clooz document was properly sourced).

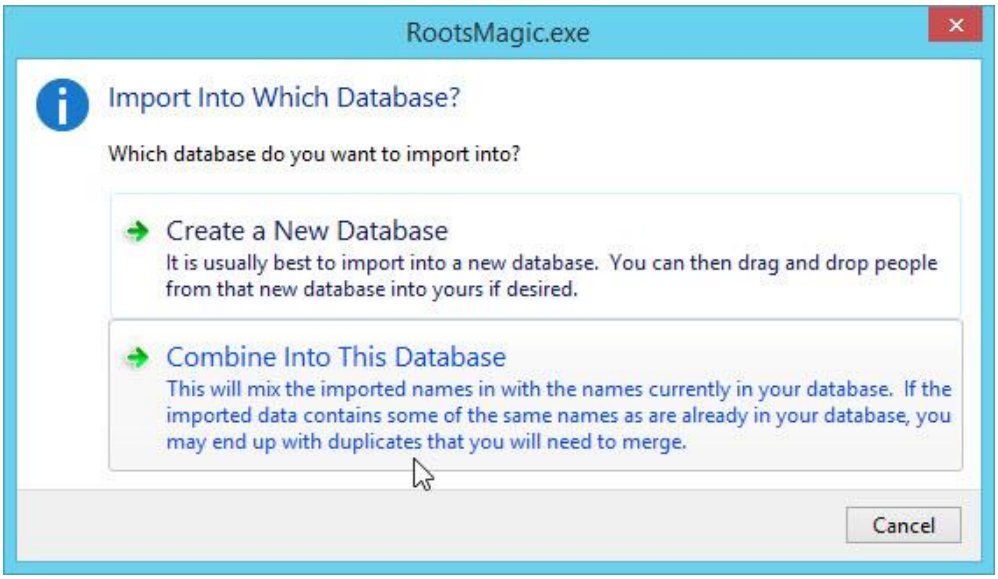


Figure 122 RootsMagic Import Database Selection

Then click OK to accept the GEDCOM file as it is already sourced.

Figure 123 GEDCOM Import Sourcing (RootsMagic)

RootsMagic will then complete the import operation. If there were any individuals, sources, or repositories contained in the imported GEDCOM that already were in the RootsMagic database,

duplication of records will result. To correct this situation, use the RootsMagic Automatic Merge capability found in the Tools menu. Clooz includes special identification values used by RootsMagic in GEDCOM file for individuals already linked to RootsMagic to ensure the Automatic Merge capability assigns them to the right people. Variations in event information for these people will not disrupt that assignment.

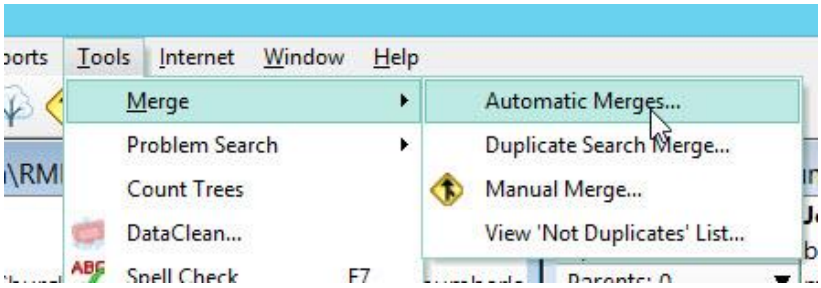


Figure 124 RootsMagic Tools Menu

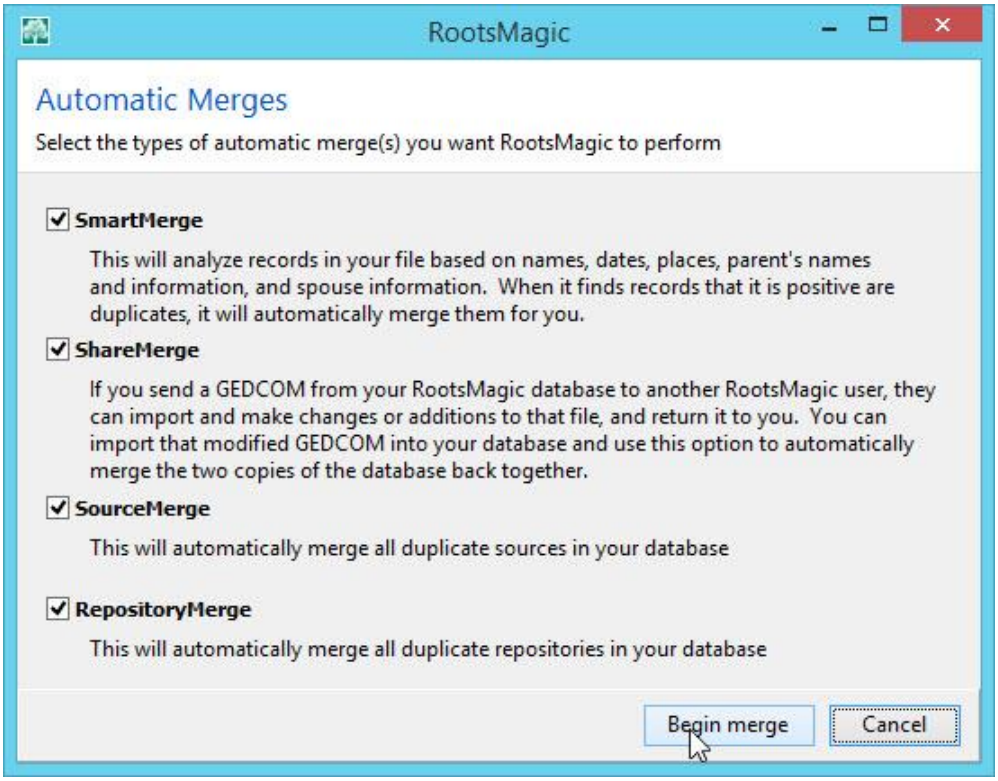


Figure 125 RootsMagic Automatic Merge Window

The information should now be properly placed in RootsMagic, and you should now go back to Clooz and click on the "I have completed the import…" button.

This procedure may change with a future RootsMagic release, if they provide a special Clooz import capability that would perform the automatic merge function automatically at the end of the import, avoiding the need for the additional user interaction.

Finally, you may find it helpful to turn on the display of record numbers for individuals in RootsMagic, so that you can reliably identify matching people with those in Clooz (where you can turn on the RIN column for the list of people). In RootsMagic, go to the Tools menu, File Options item. In the File Options window, go to the General tab, and set the "Number to display after name" to "Record number (RIN)."

The Master Genealogist

Clooz reads information from The Master Genealogist (TMG) database files (set as Primary on the External File Links list) using the Genbridge program support library provided by Wholly Genes. However, Clooz is not authorized to write directly to the same database. Therefore, a GEDCOM file is produced by Clooz for the user to import into The Master Genealogist.

Immediately after clicking the Export button on the Document Export form (or Data Transfer Manager form), you must first select the name of the GEDCOM file which will be created to contain the exported information.

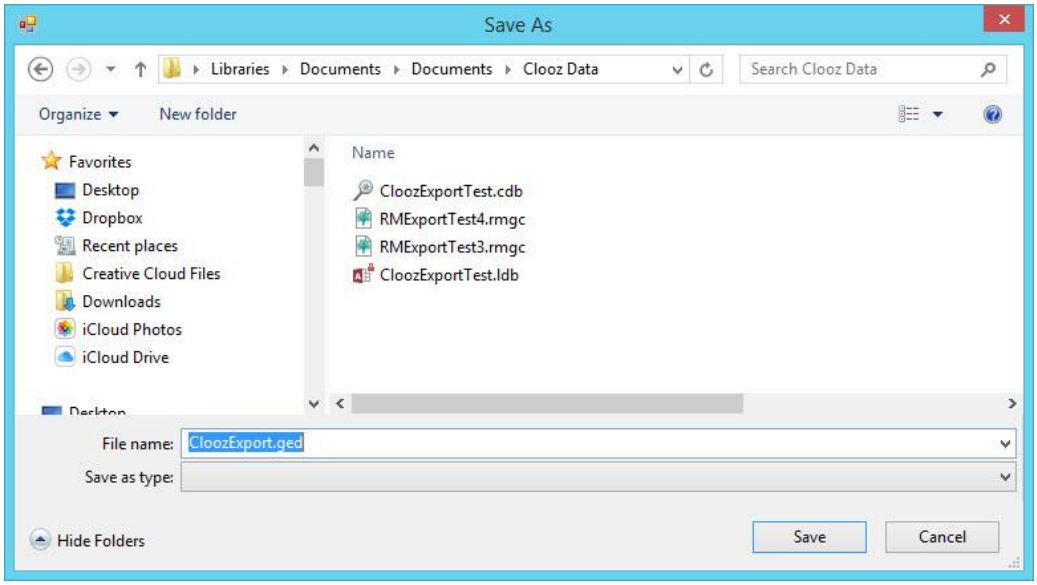


Figure 126 GEDCOM Save As Window (for TMG)

Since Clooz cannot reliably determined how TMG assigns the record numbers for individuals being exported, no attempt is made to link the individuals on export. Thus the window that appears in the RootsMagic procedure, for instance, does not appear when exporting to TMG.

At this point (or later), you can now import the GEDCOM file created by Clooz into TMG using the Import… command in the File menu of TMG. The Simple Wizard should work fine, and you should select the import file type as "GEDCOM v4.0, v5.5 (*.GED)". Locate the GEDCOM file you created from Clooz, and proceed through the wizard steps.

As with other imports of GEDCOM files, you will need to merge any duplicate individuals using the TMG tools for that purpose.

FamilyTreeMaker

Clooz is not authorized to read or write information directly from the FamilyTreeMaker database files. Therefore, you will first need to export a GEDCOM file from FamilyTreeMaker that will serve as a snapshot of the FamilyTreeMaker database. You can update that snapshot at any time by performing a new export from FamilyTreeMaker to the same filename and location.

Clooz will produce GEDCOM files designed to work with FamilyTreeMaker when a GEDCOM file produced by FamilyTreeMaker in the Clooz External File Links list has be set as the Primary external file. If a GEDCOM file produced by any program other than FamilyTreeMaker is selected as the Primary external file, Clooz will export the data to a more generic GEDCOM format.

Immediately after clicking the Export button on the Document Export form (or Data Transfer Manager form), you must first select the name of the GEDCOM file which will be created to contain the exported information.

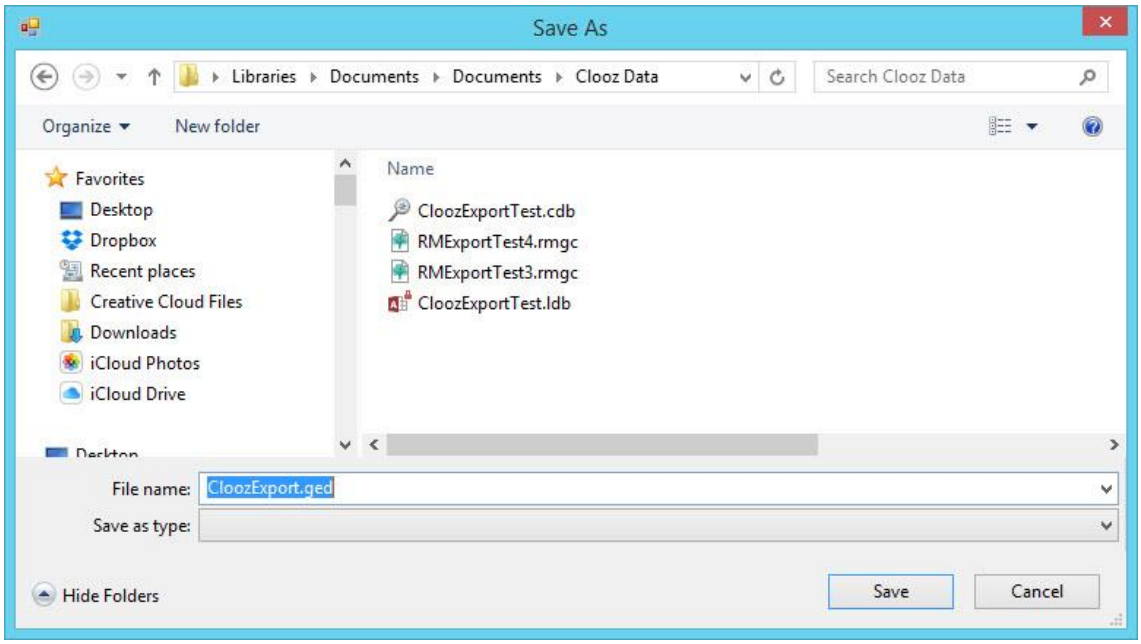


Figure 127 GEDCOM Save As Window (for FamilyTreeMaker)

You are now ready to import this GEDCOM file into FamilyTreeMaker. If you are creating a new FamilyTreeMaker database, you use the Import command (File menu). Otherwise, use the Merge command on the FamilyTreeMaker File menu.

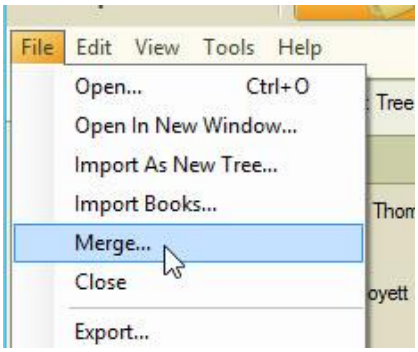


Figure 128 FamilyTreeMaker File Menu

You then select the GEDCOM file to be used (select the file created by Clooz).

FamilyTreeMaker will then perform the GEDCOM merge and open its Merge Wizard. You will normally want to include all the individuals and merge matching individuals (the default settings).

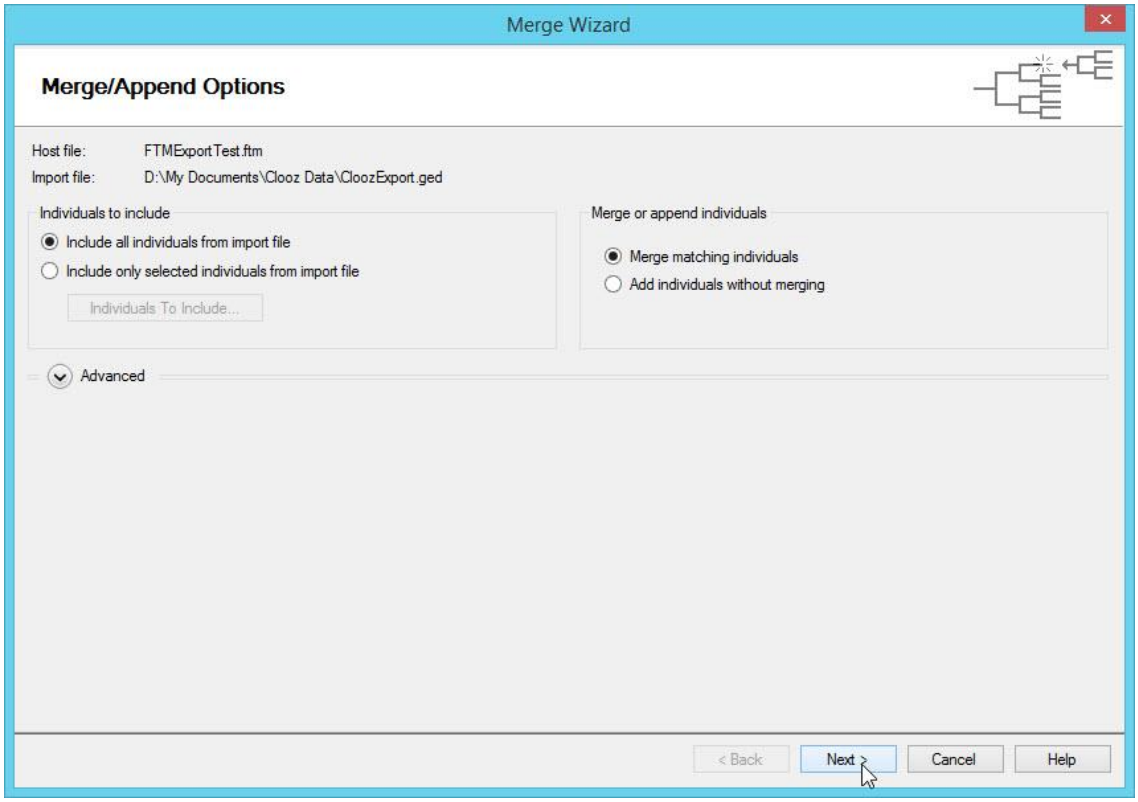


Figure 129 FamilyTreeMaker Merge Wizard

The Merge Wizard will then present you with a list of all the new and/or matching people in the GEDCOM (right side) and existing FamilyTreeMaker database (left side). Pay close attention to

the details here before proceeding with the merger, and use the buttons at the top of the window to make changes in the selection of people you are merging the new data with.

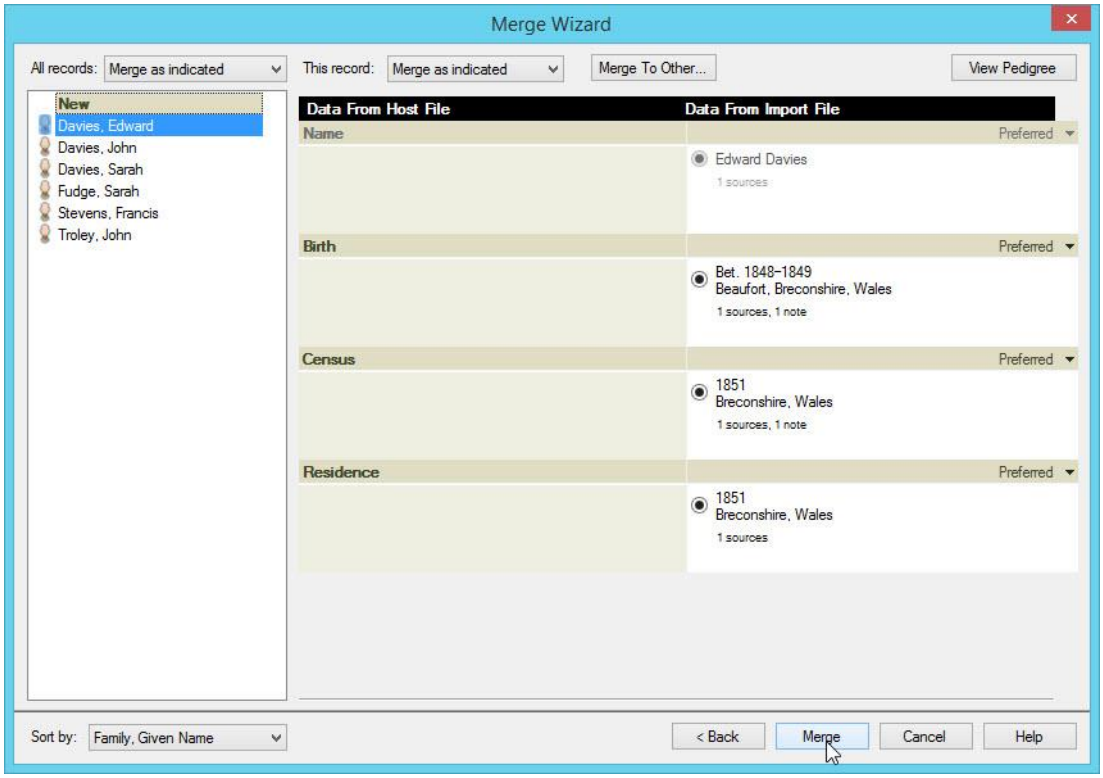


Figure 130 FamilyTreeMaker Merge Review Page

At this point the FamilyTreeMaker database should now contain all the data transferred from Clooz and placed it in the appropriate locations. If you are attempting to keep RIN values from FamilyTreeMaker synchronized with Clooz, you will need to export a GEDCOM file from FamilyTreeMaker (use the same GEDCOM file/location which you already have set as Primary in the Clooz External File Links list). This is the file serving as the snapshot of the FamilyTreeMaker database (not to be confused with the GEDCOM file created by Clooz to transfer data to FamilyTreeMaker). This can be confusing, and is why it is suggested that you establish a standard GEDCOM file name/location for Clooz exports, and for the FamilyTreeMaker snapshot.

Once you open the updated snapshot GEDCOM in the Data Transfer Manager, you can edit the RIN values column for the Clooz individuals (appearing on right side of form). If you don't normally care to display the FamilyTreeMaker RIN values on the Clooz list of people (main screen), then you do not need to go through these past few steps.

Finally, you may find it helpful to turn on the display of record numbers for individuals in FamilyTreeMaker, so that you can reliably identify matching people with those in Clooz (where you can turn on the RIN column for the list of people). In FamilyTreeMaker, go to the Tools menu, Options item. In the Options window, go to the References tab, and turn on the check in the checkbox for "Use individual reference numbers".

Family Historian

Clooz interacts directly with the Family Historian data file in the same manner as with Legacy database files. The desired Family Historian .ged data file must be "set as Primary" on the External File Links list. All changes to the Family Historian file are made automatically once the Export button is clicked on the Document Export form. The dialog window for opening Family Historian projects supports selection by project name, or specific files (as shown in the next figures). There are also some important actions the user needs to take when working with Family Historian, which will follow below.

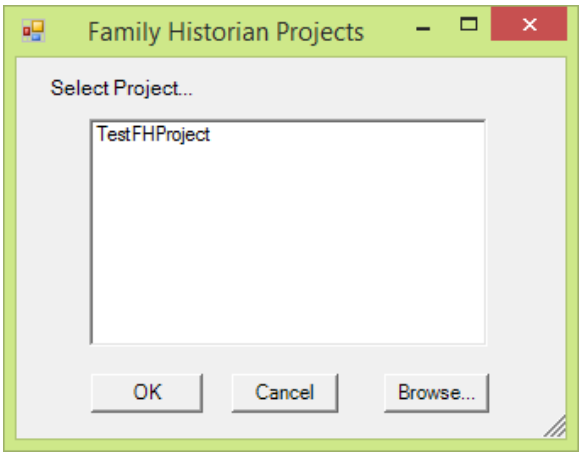


Figure 131 - Selecting a Family Historian Project

When no projects are saved within the Family Historian project folder (controlled by the user within Family Historian), the Browse function will need to be used to locate the desired file. A file selection dialog window will appear, and the user can either search for Family Historian project files, or the actual data file, by selecting the desired file type (see Figure below).

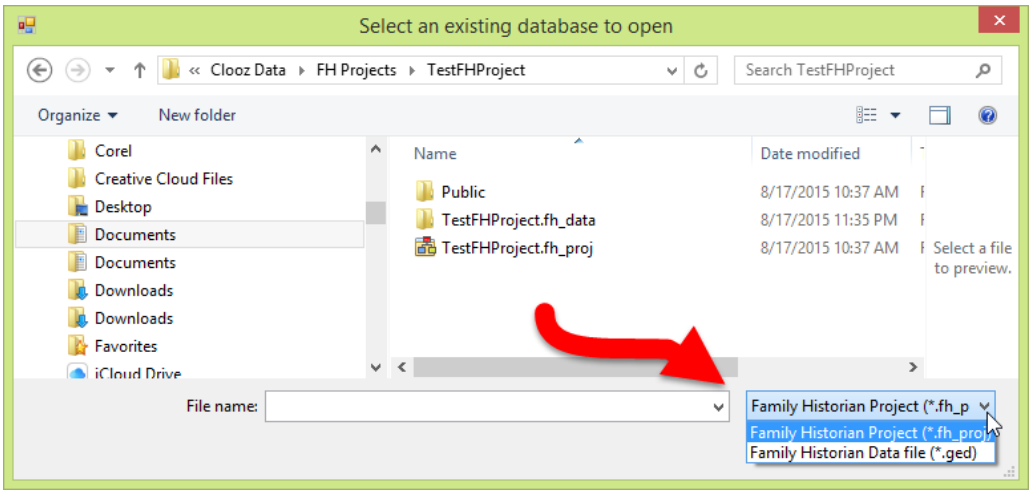


Figure 132 - Browse window for Family Historian files

Family Historian maintains its data in memory while a file is in use, therefore there are several actions required to ensure Clooz is always reading the latest data, and conversely, Family Historian uses any new data Clooz has inserted into the data file. These actions are only of concern when both Family Historian and Clooz are working with the same Family Historian data file at the same time.

When first beginning any import or export operation involving a Family Historian file, Clooz will remind you to first Save the Family Historian file. By performing the Save function in Family Historian, the file on disk is updated with any new changes recently entered by the user.

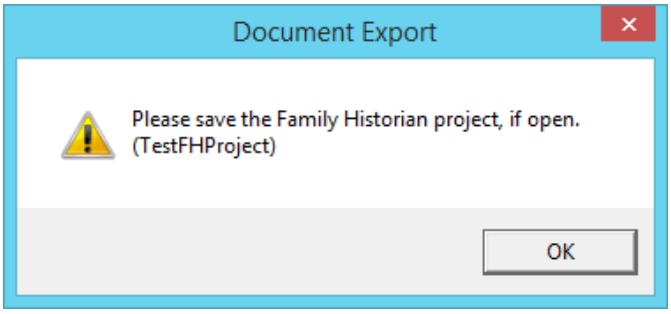


Figure 133 - Save file message for Family Historian

After the export has been completed in Clooz, if Family Historian is running and using that same file, it will recognize the change when the active focus returns to that window. The option then comes up within Family Historian to reload the data so the screens will reflect the new information in the disk file.

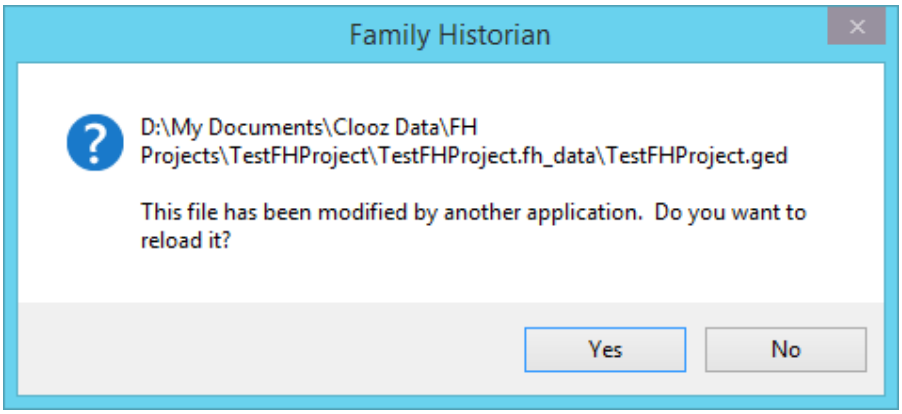


Figure 134 - Reload Family Historian Data Window

If an export is made by Clooz to Family Historian where the user has made recent changes that have not been saved in Family Historian, some loss of data is possible. If the user first reloads the data from the disk file when the prompt occurs following the export, the previous changes in Family Historian will be lost. If the user skips the reload and then saves the Family Historian data, then the exported data from Clooz will be lost. In general, if you forget to Save recent changes prior to a Clooz export, it may be better to not reload Family Historian, and instead Save the Family Historian

data. Then repeat the entire Clooz export. It all depends on which set of data (the recent Family Historian changes or repeating the Clooz export) involves the most work.

Program Options

In the Edit Menu there is a menu item to display the Clooz Options window. The Options window allows you to control a number of ways Clooz performs certain actions. The window contains a set of tabs relating to different categories of options.

Startup and Exit Options

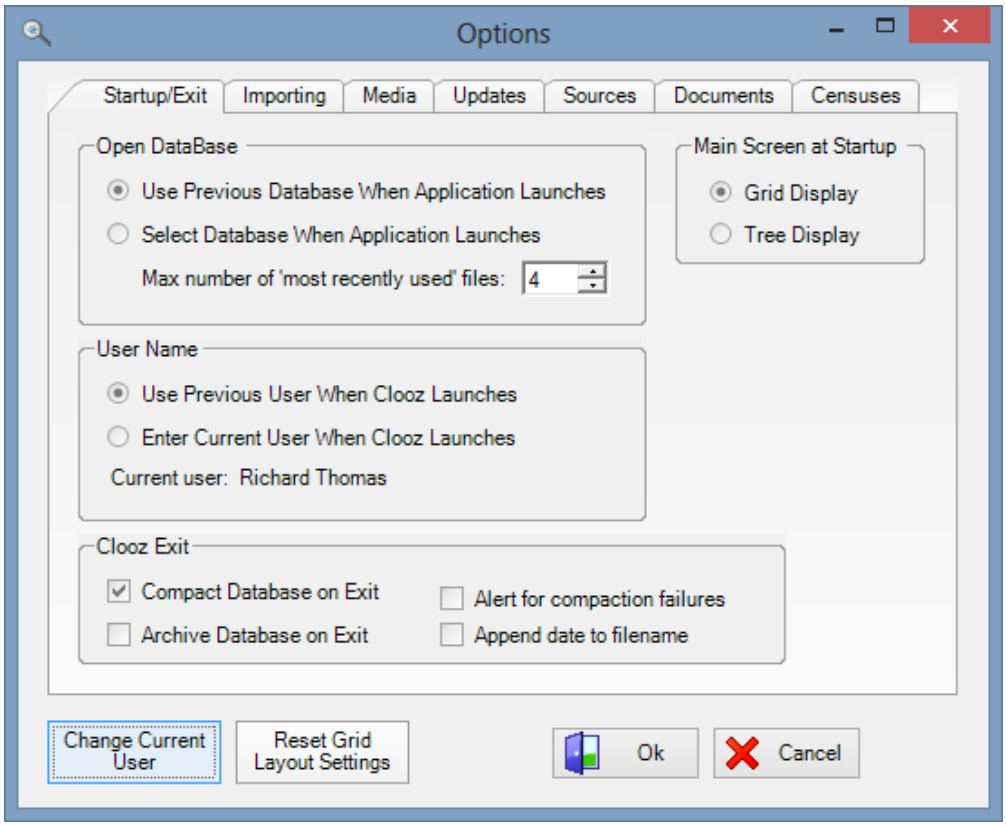


Figure 135 - Startup and Exit Options

The Open Database option allows you to have the previous database open automatically every time you start Clooz, or you have the choice to always pick a database when Clooz starts. You can set the maximum number of "most recently used" files to any number from 0 to 10.

Clooz maintains a record of who makes changes to data and when they make the changes. This information appears at the very bottom of document forms. The User Name is the name recorded for such purposes. You can either use the previous user (most likely you) when Clooz starts (the

default choice), or enter a name each time. To immediately change the name of the current user (which is shown at the bottom of the User Name box), click on the *Change Current User* button.

The last option box controls the Exit process. You can optionally have Clooz compact the database you are using, and even archive it (zip file format). It is a good idea to do both, but it does extend the length of time required for shutdown of the program. If you have a system-wide program backing up your files on a regular basis, the archive function may be turned off. The compaction process helps to minimize the amount of wasted space which accumulates in the database. Note that it is common for database access errors to occur when the compaction routine runs. No need for alarm. Your database is automatically put back to its original state if the compaction routine does not run correctly for any reason. If you want to see all the errors, set the check in the *Alert for compaction failures* checkbox. Otherwise, leave it off. These issues are coming from software beyond Clooz's control.

Importing Options

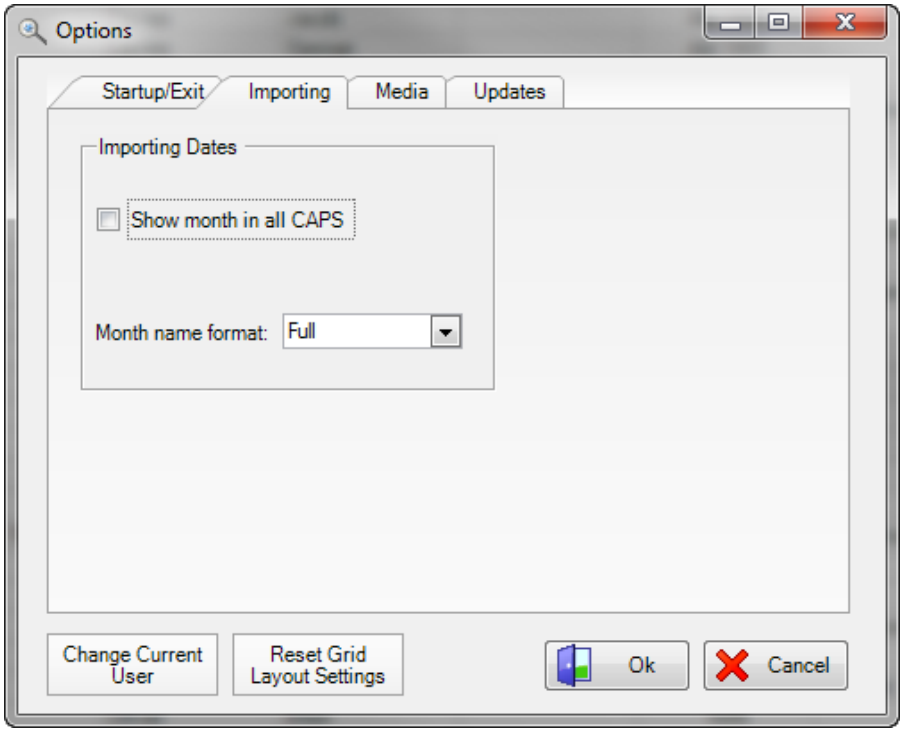


Figure 136 - Importing Options

The importing options involve the handling of date reformatting, primarily when importing GEDCOM files. Months can either be full names or abbreviated, and in all capital letters if desired.

Media Options

Clooz provides an option for you to establish a root directory for holding your media files which are attached to documents. The first entry establishes a general default for any new databases you create. The bottom entry is the specific setting for the database file in use. This root directory will allow the path names listed in the document forms to be abbreviated.

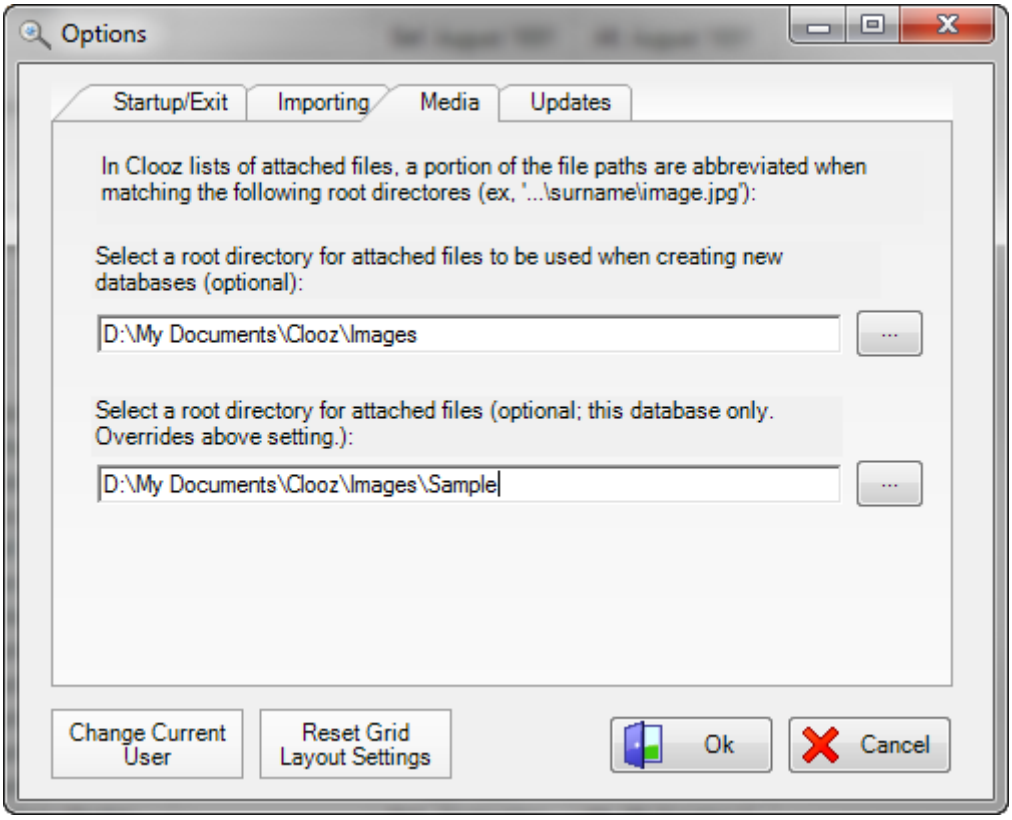


Figure 137 - Media Options

Update Options

Clooz performs automatic downloading of updates by default. The user always has to approve the actual installation of the update.

If desired, automatic updates can be disabled, and then the user will have to request them manually using the *Check for Updates* command on the Help Menu.

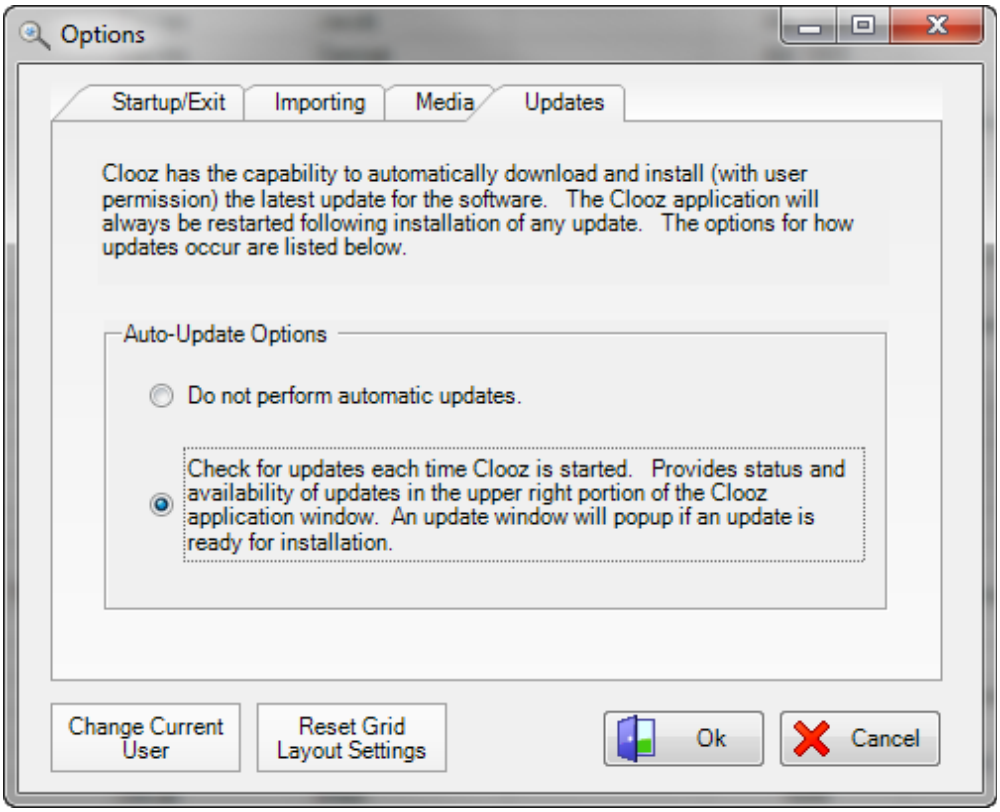


Figure 138 - Update Options

Source Options

Sources contain both a title (as in the title of a book), and a label (a more descriptive and complete identification of the item). You have the choice of which of these (title or label) will appear in the various drop down list of Sources in Clooz.

The other option under the sources tab applies to the document export function. Some users prefer to always cite a source for the person's name, as well as an event. The checkbox for this action in the Document Export form will be unchecked by default to cite the source for the person's name when the name in the document details matches the person's name in their main record. If the checkbox shown here in the Options form is checked, the source will be cited for the name regardless of whether it matches or not.

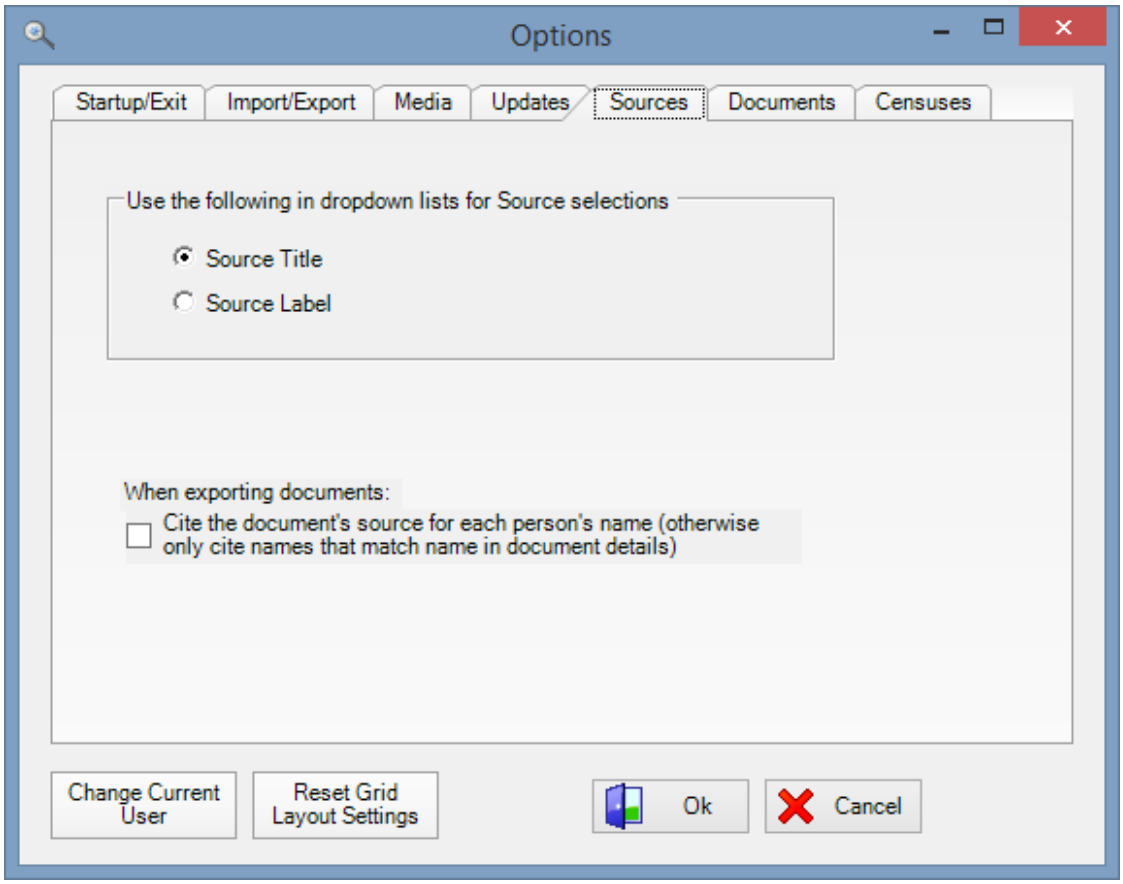


Figure 139 - Source Options

Document Options

Some users prefer Clooz warn them if they leave the Personal File # blank, or use the same value more than one time. These are carry overs from version 2 of Clooz. You can turn this feature on or off using the checkboxes in the Documents tab on the Options form.

There are also several options available to control whether Clooz will automatically fill blank birth and death dates in a person's record based on available data in a document when the document is being closed. Birth, Marriage, and Death record types will warn the user the event date and an existing date for the same event in their person record do not match, and provide the option to update the vital record date (if the option is selected to perform that action).

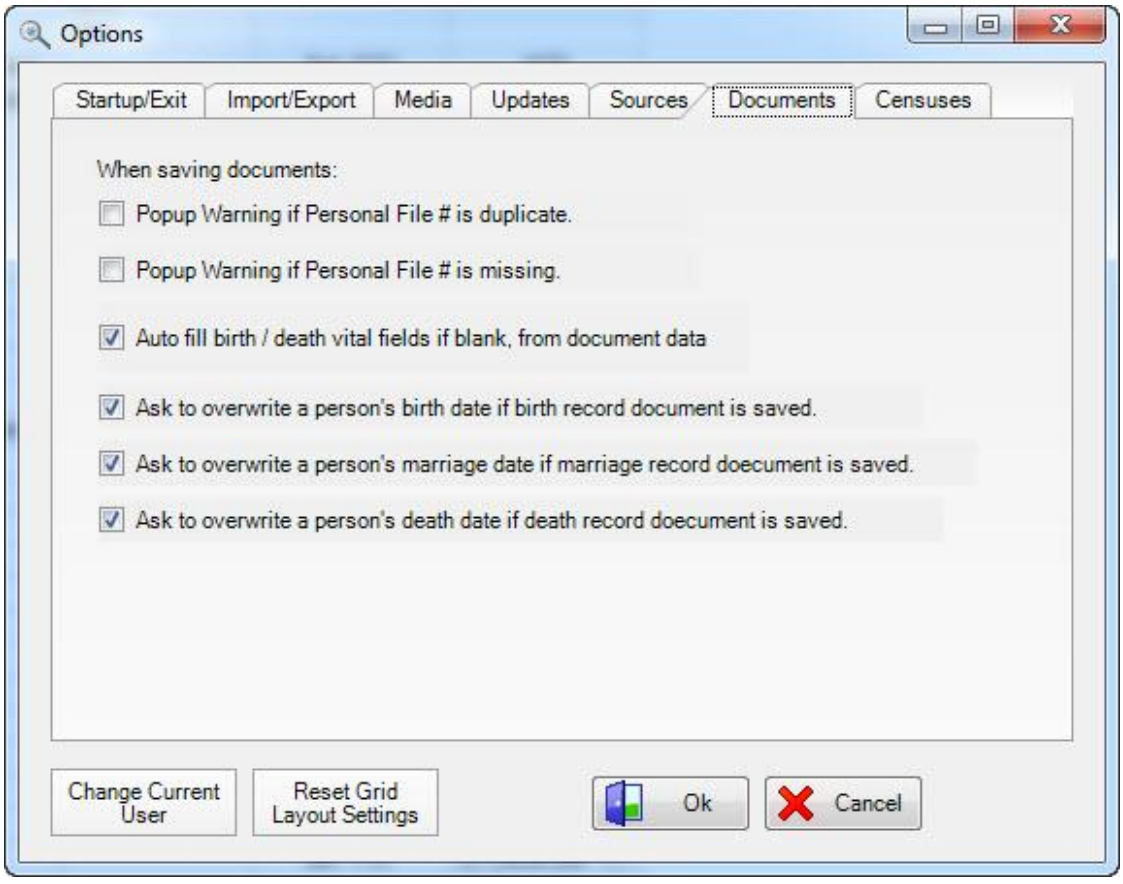


Figure 140 - Document Options

Census Options

Not all users of Clooz are researching census documents in all of the countries supported by Clooz. The Census Options all you to hide a particular country on the Explorer Bar. Existing census data in your data is not affected. Likewise, all of the countries are listed under the Clooz menu item. Turn off the census for one of these countries just helps by having less buttons and clutter on Clooz's main screen.

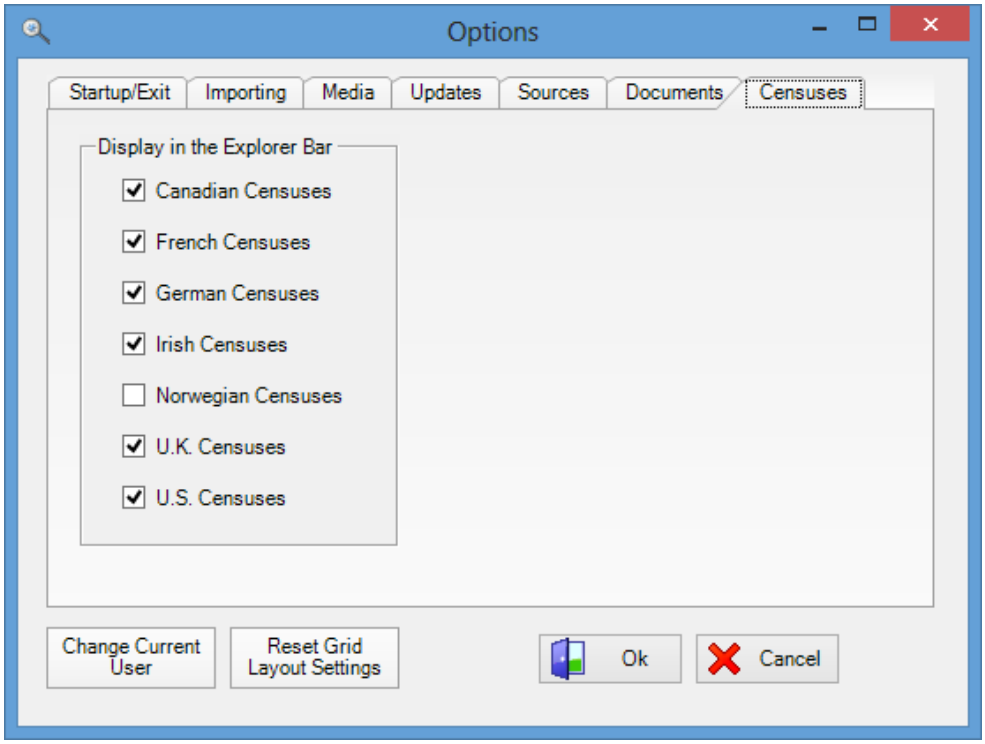


Figure 141 - Census Options

Clooz Customer Support

You can find answers to problems or questions and more Clooz information here. Technical support is complimentary if you have registered your copy of Clooz.

Support from Ancestral Systems, LLC, the owner of Clooz, is available by:

- The **Clooz** Knowledge Base on the World Wide Web contains new error messages, solutions to common problems. Check this page first at http://www.clooz.com/support/knowledge-base.html to discover things you can do to solve your issue yourself.
- E-mail support@clooz.com. The best option for problems and questions you can't solve from the manual or our website.
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- Sign-up for the Clooz Newsletter on the Clooz.com homepage.
- Write a letter to:

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  Somerset, TX 78069

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Converting from Clooz 1.x

If you own an version 1.23 or earlier of Clooz, you'll want to convert your version 1.x database to version 3. Instructions for doing so are under "Database Creation or Conversion" in the table of contents. It is strongly suggested that you read this before converting to ensure that your data gets placed properly within Clooz 3. Once you've got your database converted, there are some housekeeping items that you'll want to pay attention to.

Documents and census substitutes

Several new document templates have been added in the Document category. These are: birth record, deed, marriage record, naturalization, early and later passenger lists, and the SSDI (Social Security Death Index). There is also a new category called Census Substitutes that contains some templates that you might have used a generic document template for in an earlier version of Clooz: tax record and voting list. For these new templates, Clooz will look at your Event list in your1.x database to decide where to put your records. If, for instance, you added something to the birth event name, such as "Birth Smith," Clooz won't know to put those entries in the birth record template, so they will come in as generic documents. The easiest way to take care of this problem is to fix the events in your 1.x database and convert again. You can do this in Clooz 1.x by clicking on Edit Lists, and then choosing Events.

Here are some helpful hints on the events that Clooz is looking for:

- If you used event descriptions that came in Clooz 1.x for **birth** and **marriage**, then those documents will open up correctly as birth and marriage records in Clooz 3.
- Most land records will convert into the **deed** template if the event you used in 1.x was something containing "land," "deed," or "mortgage." If your land records don't convert into the deed template, you might want to change the event in your 1.x database to "deed" and reimport.
- If you have **naturalization** records in Clooz 1.x, in order for them to import into the naturalization template, they need to have the event called either "naturalization," "naturalize," or "citizenship."
- For **passenger lists**, Clooz will import the events "passenger list," "ship passenger list," or "customs list" into the early passenger list template.
- If you have any **SSDI** entries in Clooz 1.x, they will import into the SSDI template if they

have the event as either “SSDI” or “Social Security Death Index.” The event must be either of the choices and not something like “Social Security,” which Clooz will not recognize for this template.

- **Tax** records will be imported into the Census Substitutes tax template if you used “tax” as the event name.
- Any **voting lists** or records you might have entered into Clooz 1.x will be imported into the voting list template in Census Substitutes if you used an event that started with “vot” or the word “poll.”

In Clooz 3.0, the specific events that the program needs will be generated by the forms when they are opened. So, you don’t need to worry as much about tampering with your event names.

Photos

A couple new fields were added to the Photo template (which is now found in the Images category). You can now record a subject for a photo (which often will be the same as the event in the photo, but not always). You can also record the size of the image. You may want to take some time to update your photos with this new information.

Before converting, you might want to check over your photo records in Clooz 1.x to make sure that you have the correct paths to images. Or, if it’s too much trouble typing in the path and it’s incorrect, it’s easier to delete the path from the photo template in 1.x and then link the image using Clooz’s better image linking ability, described in the Images section of this manual.

Sources

Some new source entries were created for you during conversion. These will need your attention. In versions of Clooz before 2.0, census and photo records didn’t have source entries.

The information about these records was on the input screen. In order to standardize data input in Clooz, all templates now are set up similarly and require source input onto source templates. Therefore, during conversion, Clooz created census and image sources for you, and arbitrarily gave them titles. Census records were given a title such as “1870 US Census 002” and were converted as Document sources. The source title for photos was taken from the description field, and images were converted as Image sources. You should spend some time making these sources conform to your style of citing sources. Additionally, since Clooz didn’t know what type of source your existing sources were, they were all (except censuses and photos) converted as Book sources. You should go through each imported source and select the correct source type, based on descriptions on the Sources pages in this manual.

Repositories

The repositories that you had listed on the source template in Clooz 1.x will be imported into Clooz 3. You will find them listed in the Repository category on the Clooz explorer bar. If you want to record the address and Web information for your repositories, you'll need to edit each one to add this information, as it was not brought over in the conversion. The reason is because the repository address field in Clooz 1.x allowed you to enter a full address all in one field, but Clooz 3 has separate fields for each piece of information about a repository.

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