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## Further Upgrade Adventures

by [Jan McClintock](#)

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Finally, the actual, genuine, finished product: Reunion! I'd been working with Beta copies of the application for awhile, and each time a new Beta version came out, I had to throw away all copies of the application, the family files, reports and charts, and the preference files. Needless to say, I was happy to see the released version arrive -- now I could finally work on my **real** family files.

[Updates of the application will be released when necessary, but only the application files will then need to be replaced, not your family files.]

Since I already had an idea of the features I would use, I thought you might be interested in the steps I took after upgrading each of my own family files.

### 1. First things first

As should be routine, I made **backups** of the originals. My Reunion 4.0 application and family files are now safely copied to floppies and Zip disks.



### 2. Deciding what to look at

Using **Options -> Define -> Views** [**Help -> Search for Help, "Define View"**] was covered in the "[Upgrading from Reunion 4](#)" article. I'm still experimenting with combinations of fields and options. The great thing is, I can change it anytime I want!

### 3. Relationships, or, "Who IS that woman?"

Starting from my own family card, I chose **List -> Relationships** [**Help -> Contents -> Using Advanced Features -> Relationships**]. I choose myself, and click the **Identify** button (sounds like something from "Logan's Run," but it's harmless). The relationships of each blood relative in my family file now show on their family cards.

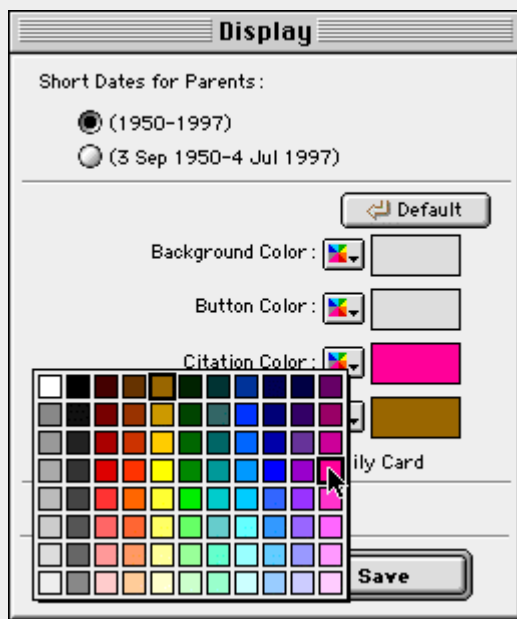


When Reunion is finished finding your relatives, the window will open to the **List** tab. You have the option to list relationships for whomever and to

whichever level you wish, just like in Reunion 4. But for the purpose of simply **showing** relationships on family cards, just click on the **Close** button.

## 4. Citation numbers

I have to admit that my color preferences run slightly contrary to those of Leister Production's design team. Although the default mustard color (see above screen shot) of the citation does show up nicely against the gray background, I would rather go my own way here. In the **Options -> Display** window, I click and hold on the **Citation Color** pop-up menu button. [**Help -> Search for Help, "Display Citation"**] Yes, I think the fuchsia would do nicely...



## 5. Data entry shortcuts

**Speed Names** [**Help -> Search for Help, "Speed Names"**] is one of those features that remind me of the TV remote control and automatic windows in a car -- once you start using it, you'll never go back. The first time I ran into this kind of fill-in-the-word-as-you-type programming was in Quicken, the financial software. To start using it ("*Don't wait! Be the first on your block!*"), I chose **Options -> Speed Names**, and click the **Fill** button (it's a tooth, get it?) for both Last Names and Place Names.

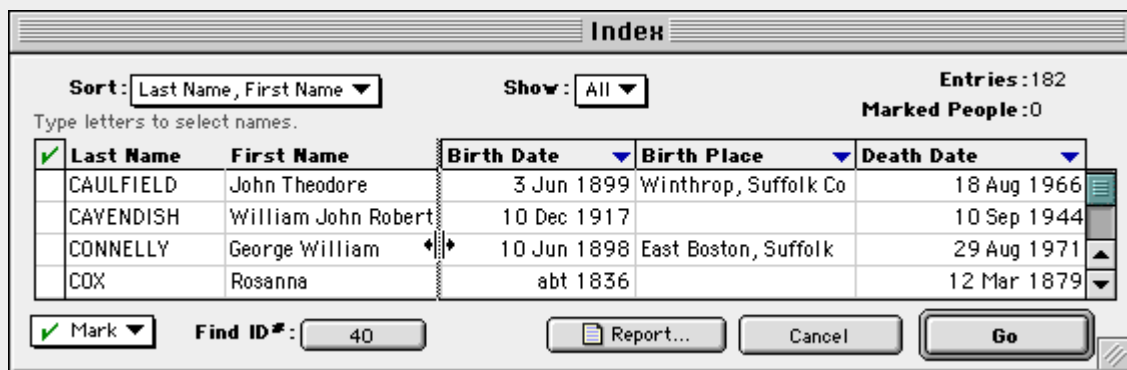
The various options for using this shortcut are laid out in the manual. The amount of editing you'll have to do in this list to keep it useful depends on the number of names in your family file. The first 100 names in the family file -- which are automatically entered in the list by the Fill option -- is enough for me. However, for those of you with thousands of people and places in your family file, you will have to keep an eye open: manually adding and deleting names here is only temporary, since the list changes each time you enter or edit a last name or place name (first-in, first-out).

## 6. Index Tweaking

When I view the **Index** [**Help -> Contents -> Using Advanced**

**Features -> Index**], I am usually doing one of two things: searching for a particular person (Navigation), or searching for the existence of a particular person (Analysis). For the first task, the default layout of the **Index** window is fine. However, being my own, individual self (hear me roar and all that), I want to see different fields: sorting by Last Name, First Name, I choose Birth Date, Parents, and Relationship. Obviously, I can change these choices anytime, and for analysis of my data, I might choose a totally different combination of fields.

Like in all the list windows (OK, I'll say it -- "spreadsheet wannabees") in Reunion, the columns can be re-sized to fit your data. Select one of the light gray column guides **within the body of the list**, and move left or right. [If you try to do this in the field title row, you'll get the field pop-up menu every time.]



## 7. New Fields

Obviously, creating new fields [**Help -> Search for Help, "New field"**] will differ for each of us, and I intend to cover this topic more thoroughly in a future article. The mechanical basics of defining new fields are covered in "Upgrading from Reunion 4." Using the **Options -> Define -> Person/Family Fields**, I checked the preformatted list of field types first to make sure my inspiration for a new field hadn't been foreseen.

Here are a couple examples of new fields I am using:

**Census** event field - as mentioned in the "Upgrading from Reunion 4" article, I want to record the date and place of each person's appearance on a census schedule. Since I have already entered some of this data in my Research Notes, I'll do the ol' cut and paste routine.

**Documents** notes field - here is where I've decided to record (given the time) actual transcripts of family bible records, court documents like probate and land records, obituaries, wedding announcements, oaths of allegiance, pensions, and other documents.

## 8. Logs

I use the **Log** [**Help -> Search for Help, "Logs"**] as a research diary and to record every source, fertile or not, that I check for data. In Reunion 4, the Log is one, big file. Now's the time for me to change that! Using **Edit -> Logs**, I use the **Add** button to create a Log field for each major surname or location in my family file. Then I cut and paste text from the original into these specific Logs.

Yes, this is time-consuming, and I **could** just leave everything in one Log. However, I want to print these Logs when I go on a research expedition, and the more specific the data, the smaller the document and the easier to find sources that I've already checked. "Duplication is the enemy" (except when you make backups, of course!).

## 9. Error Checking

OK, down to the nitty-gritty -- working with the actual data. I've waited to be able to take advantage of the new **Date Feasibility** feature [**Help -> Search for Help, "Feasibility"**], and here goes. Under **Options -> Dates**, I clicked on the **Feasibility Checking** tab. I made sure the **On** button is selected, and I enabled all the check boxes. I like the default ages that Reunion shows, so all I had to do is click the **Report** button.

Luckily, all I came up with was a small number of "Child born before Marriage" entries -- whew! On the other hand, I only have a few hundred people in my family file...

If there were many more questionable entries, I would print out the report, and use it to go through the family cards one at a time. Of course, not all of these entries will be wrong (lots of children are born before marriage, for instance), but this will alert you to date anomalies. You can add explanations or clarifications to sources or notes fields.

## 10. Place List

A good method for routing out the evil inconsistencies of data entry is to use the Place List [25-1]. I selected **List -> Places**, chose all the events, clicked the **All People** button, clicked the **List** button, and started scrolling. The object here was to root out place names that were entered in more than one way:

Elkins Cemetery, Russell Hill, Wyoming Co, PA  
Elkins Cemetary, Russell Hill, PA (who hasn't made **this** error?)  
Elkins Cem, Wyoming Co, PA

These entries all describe the same place. For a small database like mine, I just double-clicked on the person who was listed under the undesirable place name, and edited the place name data on their card.

If there were several cards that needed the same place name entry changed, then I marked the cards, and moved through them one at a time using the arrows in the big status bar. I copied the correct place name [CMD-c], selected the faulty text in the applicable place name, and pasted [CMD-v].

If there were **many** instances of a place name that needed to be changed, then I would probably use the **Find and Replace** feature with caution [**Help -> Search for Help, "Find replace"**].

Changing place names could get complicated real fast, so for larger family files, you might want to start by choosing to show place names for births only, check them, and move on to burials, etc.

Clicking the **Report** button might be a good idea, too. That will give you the "big picture" of place name entries. For instance, if the above examples were listed this way:

Elkins Cemetery, Russell Hill, Wyoming Co, PA  
Russell Hill, Wyoming Co, PA; Elkins Cemetery

They would not be close to each other on the alphabetical list, and you might not catch the fact that they are the same place. Using the printed report, however, you could more easily match discrepancies.

## More to come

So far, so good. I've customized Reunion for my own use, created a few new fields, and checked some of my data. We'll all be reading about more good ideas of other Reunion users on the [ReunionTalk](#) mailing list, and I look forward to finding more ways to teach old data new tricks.

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e-mail: [info@LeisterPro.com](mailto:info@LeisterPro.com)

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