

# Using GenSmarts Intelligently

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May 31, 2011



## GenSmarts Introduction

**GenSmarts is artificial intelligence software that 1) analyzes your existing genealogy family file, 2) produces research recommendations, and 3) provides a tracking journal log.** GenSmarts helps uncover family history brickwalls whereas traditional genealogy software is focused on providing tools to document known information. GenSmarts doesn't replace traditional genealogy software (e.g. PAF, Family Tree Maker, etc.), but analyzes the data that users have already collected and searches for the missing information via the Internet and other sources. It also creates a comprehensive journal log for users to track GenSmarts recommendations. The journal log allows users to plan for library or Family History Center trips and meeting with relatives to research the ancestor's missing information.

## What does GenSmarts do?

GenSmarts develops a profile of your ancestors based on where and when they lived using your existing family file. This profile is matched with GenSmarts inventory of known records to make suggestions about the missing data on your ancestors. These suggestions are prioritized and detailed to highlight the missing data in the family file. Many of the suggestions look at different spelling variations of ancestor's names. In addition, GenSmarts navigates the Internet using a sophisticated search engine, typing in your ancestors' information and providing the missing data using many web resources.

## Agenda

Latest Version 2.0 Upgrade Features

Using Online Help

Research Status Symbols/Filter Box Definitions

My Genealogy File

To Do List

Research Locations

Data Clean-Up

Queries

## Version 2.0 Features (Latest Update 2.1.1.91 as of May 2011)

GenSmarts just introduced their latest Version 2.0 in April 2009. Version 2.0 includes several new Internet databases to access besides several new filters. Only the basic features will be explained in this class, but users can see all the new features after viewing the video tutorials included with Version 2.0. New users will see a Wizard Box that sets up the program during installation. Existing users will not see the wizard, which the program is already setup from the previous version.

## Several GenSmarts Highlights

Video tutorial for entire software or just Version 2.0 additions

Filtering Box to reduce or eliminate suggestions

Classic Version 1.0 screen option included

Comments Box with dates

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New filtering formats using Advanced Filtering Wizard  
More Internet databases included  
And many more features!

## Using Online Help

GenSmarts has several options to help any user on any screen or definitions. Like most programs, the internal Help Index is very helpful. Select the Help menu item on the top menu bar and select **GenSmarts Help**, which routes the user to a **Help Index**. Select either a topic or type in a phrase for the required help.

For more complex help situations, GenSmarts has an online common question tutorial help reference. Select either Frequently Asked Questions in the Help menu or select the **Confused? Click here for Help** box in the upper right hand corner. An online GenSmarts topic box gives users access to many common questions or allows up to type in more specialized questions.

## Icon Symbols/Former Filter Box Definitions

The filter box has been changed and moved in Version 2.0, but the older style box is available for users wanting the former 'Classic' style. The new suggestion/filter box is located above the 'To Do List' using a pull down menu.

The Research Status indicator icon symbols and older filter box definitions are listed below for tagging the research results or filtering the results to narrow the amount of listed items in the **Research To Do List**.

**Show All:** Selecting 'Show All' removes any filtering by these check boxes - the whole list is displayed, constrained only by the "<= Search" box, if you've typed a phrase there.

**Found:** Selecting this symbol/filter box (green checked square) next to the selected item removes this from future searches and eliminates any duplication of researching this item again.

**Not Found:** Selecting this symbol/filter box (red scissors square) next to the selected item keeps this research item in the list to research later.

**Plan to Search:** Selecting this symbol/filter box (blue square) indicates no information has been found and the user needs to research this item in the future.

**No Status:** This symbol/filter box indicates nothing has been done.

**Ignored:** Selecting this symbol/filter box (red scissors) indicates the information is probably incorrect from the GenSmarts analysis.

**Available Online:** This symbol/filter box (green & red mouse) indicates research information is available online using different databases, but you may need a fee-based subscription to access it.

**Available to You Online:** This symbol/filter box (green mouse) indicates you have either a free or fee-based subscription available to you for searching selected individuals.

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**Fills Missing Data:** This symbol/filter box (green smiley face) indicates only ancestors with missing data not found in your family file will be displayed in the ‘Research To Do List.’

**Direct Ancestors:** This symbol/filter box (blue star) indicates only ancestors tagged as direct ancestors (blue stars) will be displayed.

## My Genealogy File Tab

After automatically analyzing your family file associated with your existing genealogy program, a list of ancestors is displayed in the People box as shown in Figure 1 below. Type in ancestors full name or last name in the People box or select the ID number [in brackets] associated with the last name.

[1] The family file data will be listed in the top left area of the screen and the file facts will be listed in the top center area as shown below.

[2] On the upper right side, vital facts are given for the selected individual. Sometimes, **GSEST** will be displayed. This indicates GenSmarts has given an estimate of dates and locations for unknown records of that ancestor.

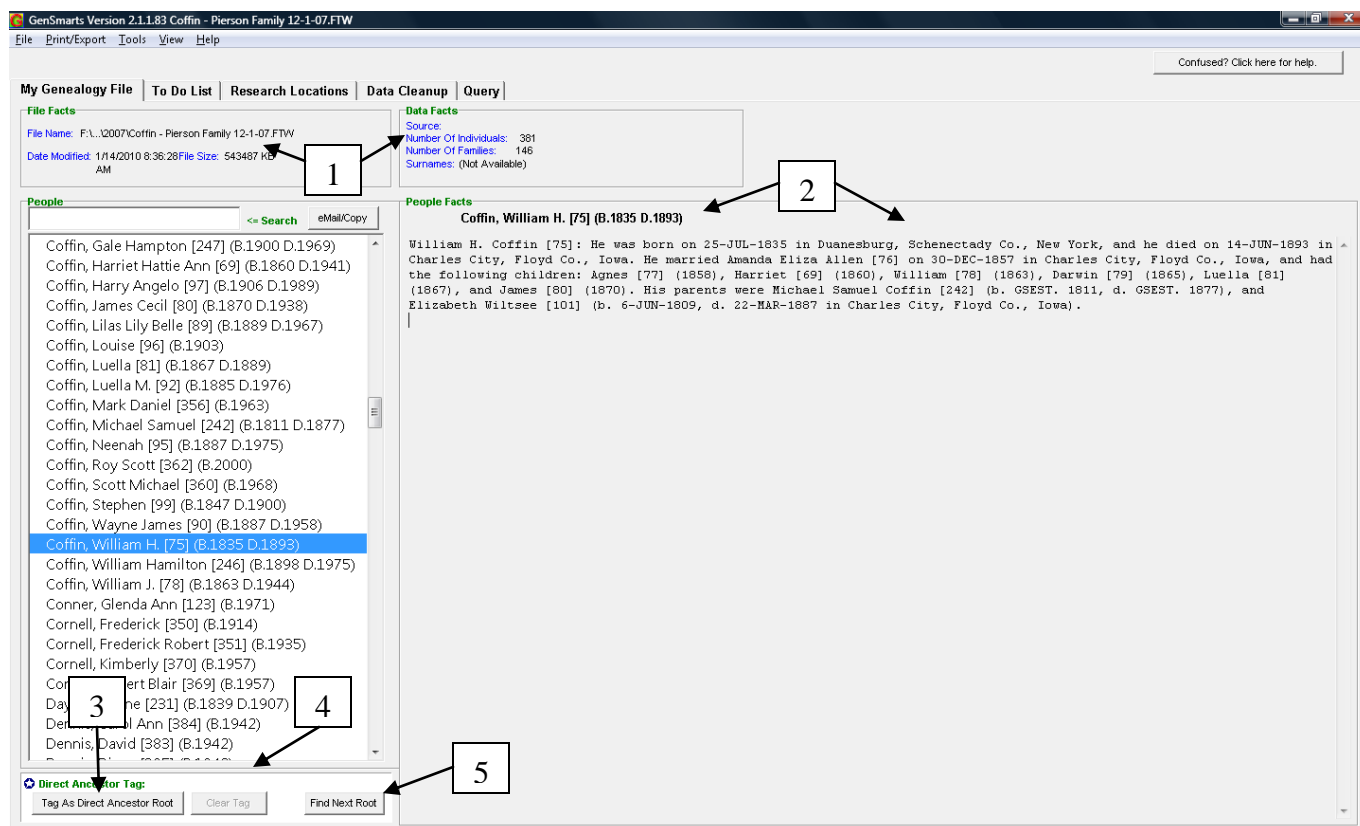


Figure 1. My Genealogy File View

New family files won't have any direct family tags (blue stars) listed next to each individual. Users can tag selected individuals with the blue stars for direct relationships as shown above using the [3] **Tag As Direct Ancestor Root** button. You can remove the blue stars anytime mistakes are made, by selecting [4] **Clear Tag** next to the mistaken individual.

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Select [5] **Find Next Root** to find the next direct ancestor to the selected individual. Users need to select the next generations with these tags (blue stars) to see higher levels of direct relationships displayed.

## To Do List Tab

This is the best feature of GenSmarts. First, it finds all the missing data for you so you don't have to keep backtracking your family file. Second, if available online, GenSmarts will search several databases to find your selected ancestor. This is a time saving tool as users just watch the program search for ancestors without typing any information. After analyzing the family file, the results will show how many suggestions are displayed in the box for all ancestors as shown below in Figure 2. Typically, hundreds to thousands of results can be displayed.

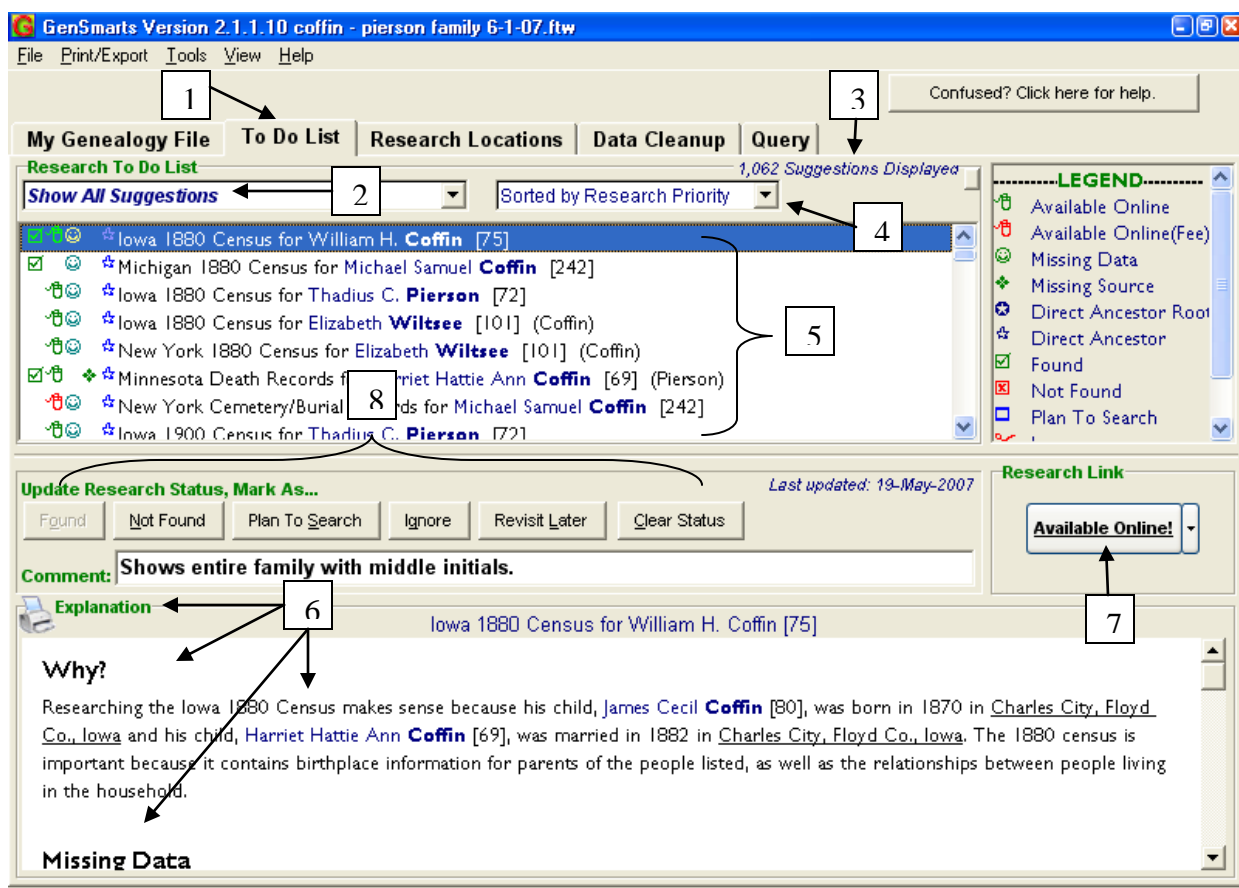


Figure 2. To Do List Typical Research Suggestions

Users can narrow search criteria by selecting certain criteria at the top of the [1] **Research To Do List** using the box that [2] **Shows All Suggestions**. GenSmarts, by default shows all possible combinations of search results. [3] Users can notice the amount of suggestions above the list box.

**Tip:** To narrow this list, select one of the other various suggestions using one of the filters. Select [1] 'Suggestions by a person.' Users will notice the [3] amount of suggestions will be reduced substantially. A new dialog box appears as shown below in Figure 3, then type in the individual you want to view or highlight the name below and select 'OK.'

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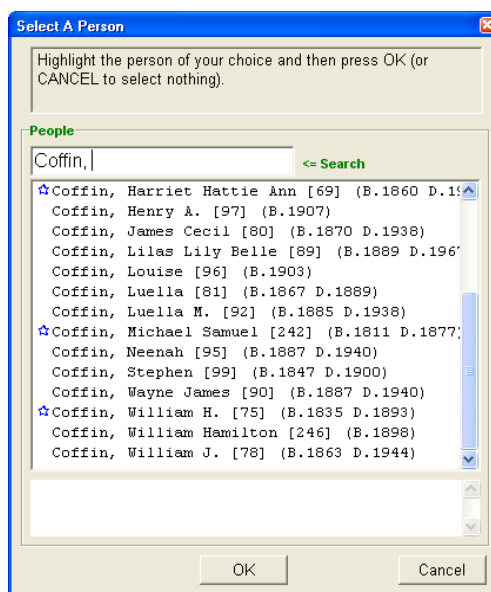


Figure 3. Index of Individuals

[4] Selecting “**Sorting by Research Priority,**” or surname, date, geography, and record type can also reduce amount of items in the research list in the next dialog box. **Research Priority** is the default sorting method. This allows users to concentrate on a single individual and eliminate all possible research recommendations and find additional data not in your family file. This is particularly helpful to new and intermediate users, not knowing the next step in genealogy research.

[5] From this list in figure 2, review each item having missing data. [6] Notice the explanation box at the bottom to see what information is analyzed by GenSmarts. Next, [7] select the Research Link on the right side, which can be shown as **Available Online** or **Trial Offers**. Selecting **Available Online** will automatically select SmartLink or SmartSearch to find the database that users subscribed to. Other databases can be selected if you know their website addresses by using the **Query** tab or adding a new subscription. **Trial Offers** requires a free trial subscription to fee based genealogy websites for 30 days or less. After completing the required information, access is allowed in **Trial Offers**.

**Tip:** If you already have a fee based subscription to Ancestry.com, Genealogy.com, Footnote.com, Archives.com, NEHGS, or other service including Heritage Online (remote library access only), but haven’t entered it yet, then select the ‘Tools’ menu item and select ‘Settings’ and ‘Subscriptions’ tab at the top of the box, then select what subscription service is used. You’ll be prompted to enter the user name and password for the selected service in a new box. Even if you don’t subscribe, the subscription based services will give you results without the images. Then you can decide if there are enough results to merit subscribing to their service.

After selecting the **Research Link** and reviewing the database record, [8] select the appropriate symbol/icon in the Update Research Status box to mark that selected item as shown above in the list. The list makes a nice journal log for you to track ancestors in the future for use at a genealogy research library. Users can type in comments for each item and save or print the entire list or just for an individual from the top menu bar. After saving and closing the GenSmarts program, the completed tasks will be eliminated.

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## Printing To Do List

A printed **To Do List** is similar to a journal log in tracking all the past research events to prevent duplication and extra work. When users visit a research library or other facility for genealogy research, GenSmarts creates a tracking journal log from the **To Do List**. You can narrow the list by using the specific library, if it's included in the GenSmarts **Research Locations** list as shown below in Figure 4.

After users have sorted and filtered the list to eliminate extra items not needed or make any adjustments, then simply select File and Print To Do List. Your printer dialog box appears, then select OK.

## Research Locations Tab

GenSmarts provides information about the research facility and its contents from its internal directory as shown below in Figure 4. Users can [1] type in their favorite genealogy research facility or select from the research facilities list. [2] The address is shown as a reference. Selecting the required item in the [3] **Available Research Items** will give users more information on the selected item in [4] **Research Comments** in the lower right box.

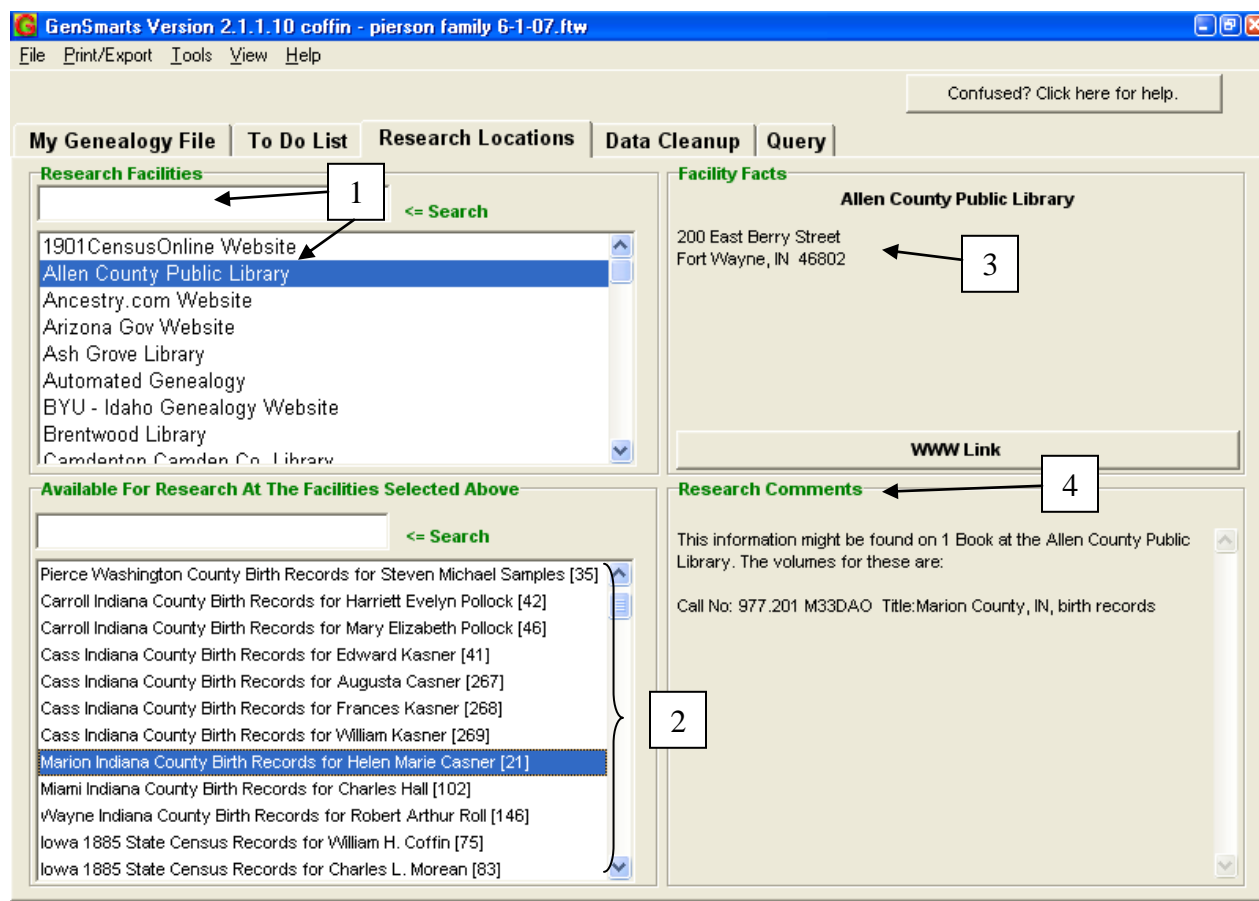


Figure 4. Research Locations View

The [2] **Available Research Items** are GenSmarts suggestions based upon what known or possible records exist at the selected research facility. The Research Comments gives information on known

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documents existing at the selected research facility. Documents include books, genealogy publications, microfilm, or family files.

## Data Clean-Up Tab

There will likely be unknown errors in your family file. GenSmarts helps to find these errors and gives you the option for corrections selecting the [1] **Data Cleanup** tab as shown below in Figure 5. There are [2] three categories for interpreting the error results: 1) **Place Names**, which lets you review how GenSmarts is interpreting the place name errors in your file, 2) **Save Issues**, which displays any issues GenSmarts has in loading your direct ancestor settings or in loading your saved research results, and 3) **Estimating**, which displays any issues that GenSmarts estimated any missing dates and places in your family file.

This **Place Names** tab contains a list of place names where you may want to check GenSmarts interpretation. In some cases, GenSmarts has been able to figure out [3] location specifics, but only by making assumptions you may wish to investigate. An example for a place name like "Clark, IN," where GenSmarts interpreted this to mean "Clark, Lake County, Indiana, USA." There's also a Clark County, Indiana, so GenSmarts will show both places for users to select the correct one.

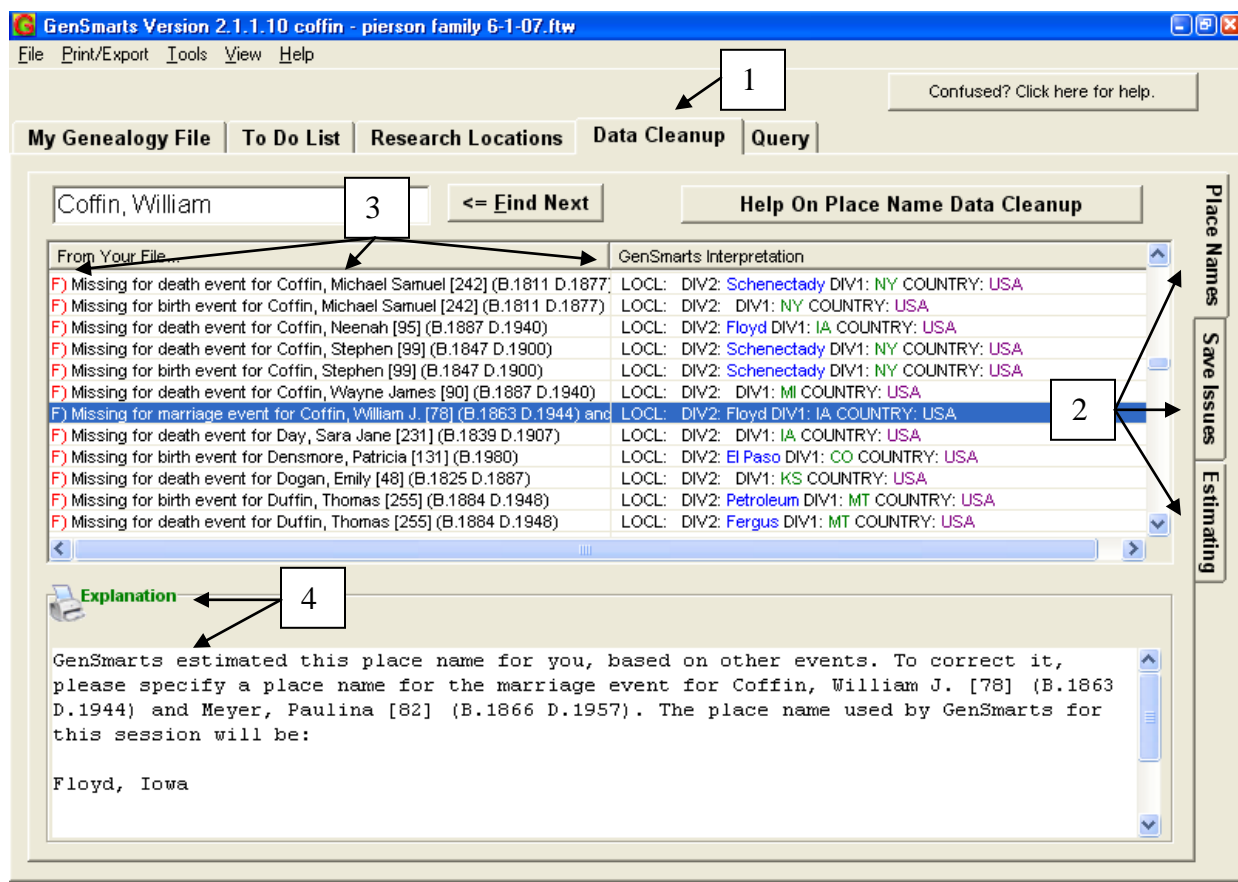


Figure 5. Data Cleanup Place Names Results

The key information saved is the name of the person, the birth date and place, and the death date and place. If the name and one of the birth date/place or the death date/place matches, then GenSmarts will not

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display any issue. If the name matches, but neither the birth date/place nor the death date/place matches then GenSmarts will warn users. GenSmarts will also display an issue if the name doesn't match.

Users will notice [3] letters on the left side assigned to each issue, which are assigned by categories:

- A) GenSmarts was unable to obtain any geographical information
- B) GenSmarts was only able to use a portion of the geographical information present
- C) GenSmarts noted that users haven't recorded the place names yet
- D) GenSmarts was able to supply some additional geographic information, based on the city
- E) GenSmarts was able to supply some additional geographic information based on the county or state
- F) GenSmarts estimated a place that was missing from the user's data

In the GenSmarts Interpretation display, [3] different geographic divisions are shown as follows:

Country

Div1 - the level of division below country (in the USA this would be a state, in England, it would be a county)

Div2 - the level of division below Div1 (in the USA this would be a county)

Loc1 - any further locality information from your file (city and any additional information imported)

The [2] **Save Issues** tab within the Data Cleanup tab lets you review and correct these types of issues. Users can delete the offending mark/tag.

In the [2] **Estimating** tab, GenSmarts uses a "jury" algorithm to estimate any missing birth, marriage, or death events in your file. Other events in a person's life that have established dates, will reason with each other to reach a consensus estimate for the missing date. If the established dates become deadlocked, it's a sign that some of the dates for events in this person's life are likely illogical. There are two types of conditions that show up in the list:

1. Illogical conditions encountered during estimating, as described above
2. Possible living person, not marked as living (if your file format supports this mark)

The [4] explanation box will contain a chronology of the estimated dates or locations from known data. If an illogical situation was detected, it will indicate as such for those affected dates.

For dates that were estimated successfully, users will find some narrative in the **My Genealogy File** tab, within **People Facts** for the person in question. This area shows the dates that were used to produce the estimate.

## Query Tab

The **Query** tab allows users to search for suggestions that are not based on any family file data. This is helpful 1) if users don't have an ancestor in a file that's currently available, 2) users simply don't want to take the time to load their family file, or 3) users want to try some place names or dates that differ from their family file.

After completing the **Query** entry box, users will obtain the results as shown below in Figure 6. The more information completed on the specific ancestor will narrow the results.

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The resulting suggestions are displayed in a subsequent window when users select the **Generate Suggestions** button. These suggestions are independent of your **To Do List** tab, and are not saved after closing this tab.

If information is available on the Internet, then the mouse symbol will be listed as shown above. If not, then a trip to local libraries or local Family History Center will probably be required.

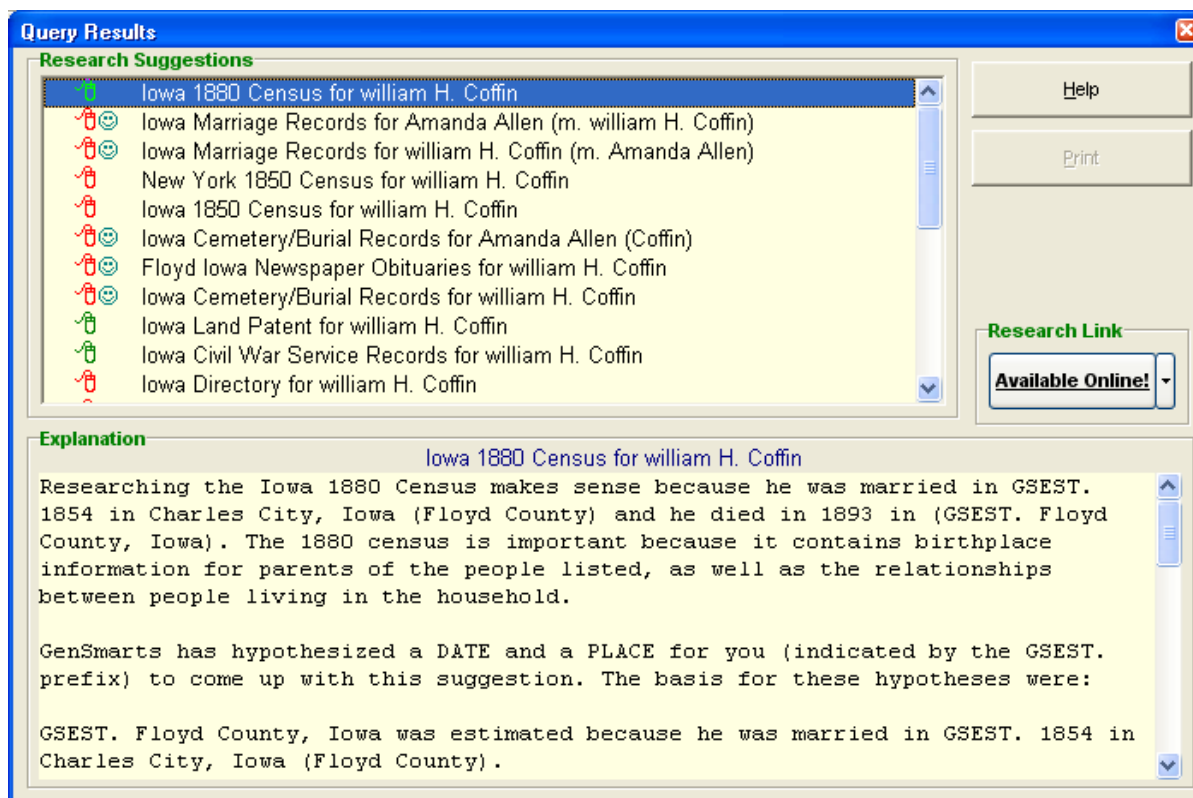


Figure 6. Query Results View

Use the Clear button if you'd like to reset all the fields to their default values (blanks in most cases).

Users can also get to the query tab by double clicking on an ancestor in your **My Genealogy File** tab. In this case, the query data will be defaulted to the data from your family file. Any changes made to this data will affect this query only, and will not change your family file or the data used from your file in other parts of GenSmarts.

## Saving GenSmarts Information

When users tag a person in your file as a direct ancestor or when users mark a research result, GenSmarts saves key information about the individual involved. The tag/mark can be shown during the next time the same file is displayed. If key information changes in the family file, GenSmarts may have a problem trying to match the tag/mark. When GenSmarts isn't able to match a direct ancestor root or research result, the tag or mark continues to be saved. However, it won't be displayed when a match isn't made.

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The **Save Issues** tab within the **Data Cleanup** tab lets you review and correct any of these types of issues. Users can delete the offending mark/tag.

## Frequently Asked Questions

### What genealogy software does GenSmarts work with?

- Family Tree Maker 2010
- PAF 5
- The Master Genealogist
- RootsMagic 4.0
- Legacy 7.0
- Ancestral Quest (replaces PAF)
- Ancestry Family Tree
- Brother's Keeper (Version 6)
- Family Trees Quick and Easy (contact us)
- Heritage Family Tree Deluxe (contact us)
- Any Gedcom export file
- Ultimate Family Tree

Since Gedcom files can be detected, virtually any genealogy software can be used with GenSmarts, provided the genealogy software has the ability to export Gedcom files into GenSmarts. It's a manual process but still works with most genealogy programs not listed above. GenSmarts Version 2.0 will work on Windows 98 through the latest Windows 7 operating systems. No support for Apple MacIntosh, unless you use PC emulator software.

### Do I have to be online to use GenSmarts?

No, GenSmarts still works without being connected to the Internet. However, users won't be able to search Internet database records on their ancestors without being connected to the Internet.

### Where can I obtain GenSmarts?

Users have two options: Try the limited trial version by downloading from the GenSmarts website for 30 days at: [www.GenSmarts.com](http://www.GenSmarts.com). The trial version is an 8 MBS file, which will take less than 3 to 5 minutes to download using cable or DSL broadband or about 20 minutes with older 56 KB telco modems. Users have 30 days to evaluate the trial version. Download the FREE manual in PDF format for more information.

Option Two: For all other genealogy software users, purchase directly through GenSmarts or Ancestry.com Store for \$29.95. Credit cards are accepted.

### Are updates free?

Yes, all updates to the version you purchase are free. If you purchase Version 2.0 and Version 2.5 is available, that would be a free upgrade. GenSmarts reserves the right to charge a nominal upgrade fee for the next major version upgrades, ie, Version 3.0.

Try the trial version to see if you can find answers to your brickwalls and create a research journal. If you like the software, you can purchase it after a 30 day trial period.

Good luck on your research and Happy Trails!