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THE MASTER GENEALOGIST  
USER'S GROUP OF SOUTHERN MAINE

# The Master Genealogist Some New Features in Version 7

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Slide Content courtesy of Terry  
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# Data Entry Reminders

- One of the neat new features for both new and experienced users of TMG is the Data Entry Reminder.



# Data Entry Reminders

- Knowing exactly how to enter data for best results in Tags and Sources can be a concern for new users, and also for experienced users who have created complex Tag Sentences or Source Types. The new "Reminder" function is designed to assist users in either situation.



# Data Reminder Notes

- The Reminder feature, introduced in TMG version 7, provides notes, or hints, on how to enter data in Tags, Sources, or Citations in order to produce the desired outputs. Reminders are provided for selected standard Tag Types and Source Types, which should aid especially new users.



# Data Reminder Notes

- Users can add reminders or modify the standard reminders, which should be useful for more experienced users who have modified Tag Types or Source Types. This feature is especially valuable for those who have created complex Tag Types using split Memos or involved Roles, and for Source Types using split Citation Details.



# Data Reminder Notes

- Reminders appear in a separate window, which by default automatically appears when you do any of the following:
- Open a Tag Entry Screen which is using a Tag Type that has a reminder attached.
- Open a Source Definition screen while using a Source Type that has a reminder attached.
- Open a Citation screen and select a Source that has an associated reminder.



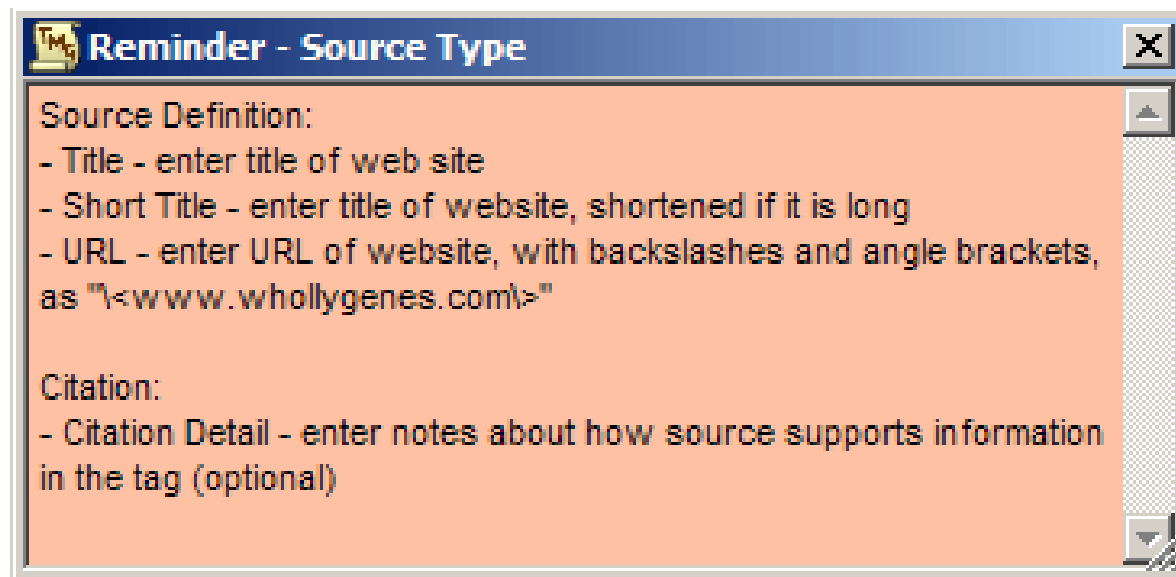
# Data Reminder Notes

- The Reminder window closes when you close the screen that caused it to open. You can close it manually with the [X] button at the upper right corner of the screen, or by clicking the Reminder icon (see below). The Reminder window opens initially in the upper left corner of the main TMG screen. You can relocate and re-size it a more convenient position, and it will open in that position thereafter.



# Data Reminder Notes

- A typical Reminder screen seen while creating a Source or citing it might look like this:





# Data Reminder Notes

- Reminders for **Tag Types** are available when you create a new Tag or edit an existing Tag when the Tag Type being used had a reminder associated with it. These Reminders are intended to help users know which fields to use for data entry in the Tag Entry Screen, and when necessary, provide hints on phrasing the entries for best output



# Data Reminder Notes

- **Source Reminders**
- Reminders for Sources are a bit more complex. They can be created, and appear in the Reminder window, in two separate contexts:



# Data Reminder Notes

- First, they appear when you create or edit a Source whose Source Type has a Reminder associated with it.



# Data Reminder Notes

- Second, when you create a Citation, a reminder may again be available. By default, it will be the one associated with the Source Type used to create the Source you are citing.



# Data Reminder Notes

- But users have the ability to modify or create a new reminder associated with an individual Source. When that is done, the reminder seen from the Citation screen is the one associated with the Source, not the one associated with its Source Type.



# Data Reminder Notes

- **Supplied Standard Reminders**
- TMG 7 comes with standard Reminders for the Tag Types that are most commonly found confusing by new users.



# Data Reminder Notes

- There are also Reminders for the more commonly used Source Types. These Reminders have two parts. The first, labeled "Source Definition," is intended to help users enter data in the various Source Elements as they define a new Source in the Source Definition screen. The second part, labeled "Citation," is intended to aid in creating citations to the source in the Citation screen.



# Data Reminder Notes

- These Reminders will be part of new Projects created in TMG 7, and will also be added to existing Projects created with prior versions when the Project is first transferred to version 7.





# Data Reminder Notes

- Note: The standard Reminders describe use of the default Tag Types and Source Types. If you have modified the Sentences of Tag Types or Templates of Source Types for which there are standard Reminders, those Reminders may not be correct. If necessary, you can edit them to align with your modified Tag Types and Source Types as described below.



# Data Reminder Notes

- **Editing and Creating Tag Type Reminders**
- Reminders for Tag Entry are edited on the Other tab of the Tag Type Definition, which is accessed by selecting a Tag Type in the Master Tag Type List (Tools menu) and clicking Edit:



# Data Reminder Notes

**Tag Type Definition**

Label : Note      Language : English (U.S.)       Active

General      Roles and Sentences      **Other**

Display witnessed tags

Using the label above

As "Witness"

Display roles for :

Principals

Witnesses

Year validation :

Minimum : 100

Maximum : 3000

GEDCOM export as :

Tag : NOTE

1 EVEN

2 TYPE Note

Reminder

Enter text in the Memo in a form to complete the sentence "He/She ...". The optional date and place will appear after Memo text.

OK      Cancel      Help



# Data Reminder Notes

- Simply enter the desired text, or edit the existing text if present. The standard reminders may need to be modified if the user edits the Tag Type Sentence and thus changes the way data should be entered into the tag. Whatever text is entered will be visible in Reminder window when a Tag of this type is created or edited.



# Data Reminder Notes

- **Editing and Creating Source Reminders**
- In general, Source Reminders are created on the Edit Source Type screen, accessed by selecting a Source Type from the Source Types screen (Tools menu) and clicking Edit:

- 



# Data Reminder Notes

**Edit Source Type**

Custom Source Type : Cemetery Marker

is most similar to : Cemetery Marker

Full footnote  
[NAME OF PERSON] [RECORD TYPE] <, [REPOSITORY REFERENCE] >, [REPOSITORY], [REPOSITORY ADDRESS] <, [COMMENTS] > <, [CD] >.

Short footnote  
[NAME OF PERSON] [RECORD TYPE], [REPOSITORY] <, [CD] >.

Bibliography  
[REPOSITORY ADDRESS]. [REPOSITORY]. [NAME OF PERSON] [RECORD TYPE].

**Reminder**  
Source Definition:  
- "Name of Person" - enter name of buried person in form Surname, Given name  
- "Record Type" - enter "tombstone" or appropriate description of item

Default source templates are constructed by Wholly Genes Software according to our particular interpretation of the selected style manual. No endorsement on the part of the author of that style guide is intended or implied nor are the templates warranted to accurately reflect the intentions of that author. Researchers are encouraged to consult the appropriate style guide to ensure proper usage.

OK Cancel Help



# Data Reminder Notes

- Enter the desired text, or edit the existing text if present. Keep in mind that the Reminder text entered here may appear in two separate contexts, first when a Source is created using this Source Type, and again when that Source is cited. The standard Reminders address this by having separate sections for "Source Definition" and "Citation" so the user will readily know which comments apply to each action.





# Data Reminder Notes

- Tip: If the field is too small for convenient editing, press F7 to open a larger editing field (this tip works in most "memo" type fields).





# Data Reminder Notes

- Generally, if any hints are needed for citing the Source they should be part of the Reminder created for the Source Type, as described above. But occasionally, users may modify the Output Templates of an individual Source, making the Reminder notes from the Source Type inadequate or incorrect. In those cases, a Reminder can be created for the specific Source to aid in citing it. That is done on the Supplemental tab of the Source Definition screen:



# Data Reminder Notes

Source Definition

General Supplemental Attachments Output form

< Comments >

Recorder : Other

Medium : Other

Fidelity : Other

Indexed : Unknown

Reminder

CD1= name of registrant  
CD2= "serial no. xxx" and/or "order no. yyy"  
CD3= date of registration  
CD4= roll no. of film

OK Cancel Help



# Data Reminder Notes

- Type in the desired text, which will be seen when creating a Citation for this source. If you prefer to start with the text from the Source Type reminder, click the "Copy" button to the right of the Reminder field to copy that text into field so it can be edited.

