

Version 4.0

Clooz User Guide



Ancestral Systems, LLC

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Version 4.0

Ancestral Systems, LLC

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Email Support	Online Resources	Website
support@clooz.com	https://support.clooz.com	https://clooz.com

Table of Contents

Getting Started	1
What is Clooz?	1
Clooz Data Organization	3
Information Records	3
Subjects	4
Families and Events	6
Sources	7
Repositories	8
Research Planning	9
Clooz Terminology	11
Examples of ways to use Clooz	14
Case Study #1 – Data already in a family tree software database	14
Case Study #2 – The Reformed Researcher	15
Case Study #3 – The Professional	17
Case Study #4 - The Grandmother's scrapbooks	18
Case Study #5 - Inventory of Family Stories and Heirlooms	19
Using Clooz the first time	20
Steps to follow when using Clooz for the first time	20
Questions or Issues	36
More Information	36
Managing Your Data Files	39
Creating New Database	41
Opening an Existing Database	42
Open a Database from a Previous Clooz Version	44
Relocating Clooz to a New Computer	47

Data Display and Manipulation	49
Window Header Components	50
Main Screen Tabs	50
Navigation Panel	52
Main Data Area	53
Toolbar	53
Status Bar Components	53
Display Formats	54
Grid Format	54
Composite View	55
Navigating the Displays	60
Sorting Records	62
Searching and Filtering Records	62
Simple Matching (single set of criteria)	63
Advanced Matching (multiple sets of criteria)	66
Grouping Records	67
Customizing Display Formats	68
Adjusting Column Widths	68
Changing Column Order	69
Choosing Columns to Display	69
Managing Data Records	71
Adding New Records	71
Editing Existing Records	72
Deleting Records	73
Merging Records	73

Cloning (Duplicating) Records	75
Bulk Edits	77
Converting Information Record Types	79
Clooz Editing Tools	81
Editing Text Fields	82
Basic Text Fields	82
Constrained Text Choices	83
Auto-Fill Text Fields	84
Editing Rating Fields	86
Selecting Rating Values	87
Editing Calendar Date Fields	87
Working with Digital Media Files	89
Linking a media file to a Clooz record	90
Editing the Media Item Details	91
Viewing Attached Media Files	91
Image Viewer	93
The Image Viewer Control Panel	94
Floating and Docking the Viewer to and from an External Window	95
Panning The Image	96
Zooming the entire image	97
Using the Magnifier	97
Displaying the Row Guide	98
Using the Row and Column Header Overlays	99
Correcting Image Orientation (Rotation)	101
Improving Image Viewing	102
PDF File Viewer	102
PDF Viewer Components	103

Toolbar	103
Thumbnail Panel	103
Context Menu (right click)	104
Navigating a Document	104
Searching for Text	105
Adjusting the Document View (rotation, zoom)	105
Text Viewer	106
Spreadsheet Viewer	107
Editing Information Records	109
The Information Record Editor	109
Data Entry Field Pages	109
Information Record Template Formats	110
Form-based Templates	111
Tabular Templates	112
Information Record Editor Side Panel	114
Information Record Editor Bottom Panel	115
Adjusting Size of the Editor Sections	116
Associating Subjects with an Information Record	116
Selecting the Subject Type	118
Adding a New Subject	118
Linking an Existing Subject	119
Copying Subject Details	120
Editing the Subject Record	123
Source Citation Data	124
Media Links	126
Extracting Event Information	127
Adding Events to an Information Record	128
Automatic Event Generation	128

Manually Add New Event	129
Deleting Events from an Information Record	129
Managing Event Participants	129
Manage Participants Command	129
Add Selected Subject	130
Extracting Family Groups	131
Adding Family Groups to an Information Record	132
Automatic Family Generation	132
Manually Add New Family	133
Deleting Families from an Information Record	133
Managing Family Members	134
Research Planning Connections	135
Editing Repository Records	137
Editing Source Records	139
Editing Subject Records	143
The Subject Editor	144
Planning Your Research	147
Research Projects	148
Project Editor	149
Research Objectives	150
Research Objective Editor	150
Defining Research Tasks for the Objective	151
Targeting Subjects	151
Adding or Removing Subjects as Targets	152
Research Tasks	153
Research Task Editor	154

Default Source and Repository	155
Adding Information Records	155
Exchanging Data with Other Genealogy Programs	157
Connecting with External Files	161
Synchronization with External Record Identifiers	164
Identifier types recognized by Clooz:	164
GEDCOM Tags Associated with Identifier Types	165
Linking Clooz Records with External Records	166
Automatic Linking using Universal IDs	167
Updating ID Values for All Linked Records	167
Data Transfer Manager	168
Showing Record Details	169
Comparing Clooz and External Records	170
Importing Data from External Files	172
External Files other than Clooz Databases	172
Advanced Import Options	179
Importing Data from Another Clooz Database	181
Exporting Data Using the Data Transfer Manager	181
Additional Steps with RootsMagic or Ancestral Quest	183
Importing into RootsMagic	184
Advanced Export Options	185
Record Exporter	186
Subject Record Export	189
Information Record Export	190
People Tab	191
Events Tab	192
Source Tab	193
Repository Tab	193
Families Tab	194

Source Record Export	195
Source Tab	195
Repository Tab	196
Repository Record Export	196
Report Generation	197
Report Layout Types	198
Individual Record Reports	198
Individual Record Layout for Information Records	199
List Reports	202
Large Reports	202
Generate a Report	203
Requesting a Report from the Reports Tab Page	203
Requesting a Report from a Records List	204
Requesting a Report from a Record Editor	206
Report Viewer	208
Report Viewer Ribbon Toolbar	209
Print and Page Setup	209
Print a Document Using the Print Dialog	210
Print a Document Using Default Settings	211
Change Print Settings Using the Page Setup Dialog	211
Scaling	212
Navigating	213
Navigate Between Pages	213
Using the Navigation Pane	214
Navigate Using the Hand Tool	216
Zooming	217
View Control	218
Exporting	218
Export Document to a File on Disk	219
Send Exported File Using E-Mail	220

Copying to the Clipboard	222
PDF-Specific Export Options	222
HTML-Specific Export Options	226
MHT-Specific Export Options	228
RTF-Specific Export Options	230
DOCX-Specific Export Options	231
XLS-Specific Export Options	232
XLSX-Specific Export Options	234
CSV-Specific Export Options	236
Text-Specific Export Options	238
Image-Specific Export Options	239
Document Control	240
Show/Hide the Parameters Panel	240
Changing a Watermark	241
Adding a Text Watermark	242
Adding an Image Watermark	242
Specifying Watermark Properties	243
Removing a Watermark	243
Report Viewer Parameters Panel	244
Customizing Report Titles	245
Selecting Records to Include in Reports	246
Selecting Records to Include in Individual Record Reports	246
Selecting Record Sets to Use in List Reports	248
Additional Report Details	250
Filtering Data Records	250
Report and Display Options	253
Options for Individual Record Report Layouts	253
Options for List Report Layouts	255
Sorting Lists in the Report Viewer	255
Exporting Directly to Excel	257
Exporting to Excel from Data Editors	257

Exporting to Excel from Main Screen Lists	259
Tools and Options	263
Program Options	264
General Options	265
Maximum number of Most Recent Used files	265
Default data folder location	265
Maximum number of Activities to be tracked	265
Ask to confirm deletions from main lists	266
Application Startup Options	266
User designation at startup	266
Use Previous Database	266
Main screen at startup	266
Show Help at startup after updates.	266
Starting screen type	266
Display the Tool Bar at Startup	266
Display the Group Panel at Startup	267
Startup data type focus (Database Overview)	267
Check for Clooz software update at startup	267
Application Shutdown / Database Closing Options	267
Archive Database on Database Closing	267
Archive Database on Program Exit	267
Append date to archive filename (needed to retain multiple backups)	267
Maximum number of backup copies (per Clooz database file)	268
Backup folder location	268
System Environment Options	268
Proxy User ID	268
Proxy Password	268
Use Video H/W Acceleration	268
Display Options	268
Scaling factor for application window components	268

Theme Style	269
Show horizontal lines on main grids	269
Show vertical lines on main grids	269
Alternate row backgrounds on main grids	269
Show horizontal lines on Composite Views	269
Show vertical lines on Composite Views	269
Alternate row backgrounds on Composite Views	269
Show grid lines on Options list	269
Header text for User Field 1 column (Subjects)	270
Header text for User Field 2 column (Subjects)	270
Media Files and Viewing Options	270
Media viewer display location	270
Use Clooz image viewer	270
Use Clooz pdf viewer	270
Use Clooz spreadsheet viewer	271
Use Clooz text viewer	271
Default root media folder	271
Date Processing Options	271
Treat ambiguous dates as U.S. order (mm/dd/yyyy)	271
Show month in all CAPS	271
Month name format	271
Date modifier format	271
Date modifier case usage	272
Personal File Identifier Options	272
Show duplicated Personal File ID warning	272
Show missing Personal File ID warning	272
Subject Data Updating Options	272
Auto-fill Vital events if blank	272
Ask to overwrite Birth event data	272
Ask to overwrite Marriage event data	272
Ask to overwrite Death event data	272
Information Record Options	273

Default setting for copying details	273
Source Options	273
Source list naming	273
Automatically use Quick Capture URL as Publisher URL	273
Editor Options	273
Autocomplete is case sensitive	273
Toolbar Options	274
Type of operation (search or filter) performed when Enter key is pressed	274
Import / Export Options	274
Cite the source for Each Census Person's Name (Export)	274
Save archive (backup) of database prior to imports	274
Default setting: Include events and families for Subjects in Inform- ation Records.	274
Default setting: Import cited sources when importing Information Records	274
Default setting: Include repository for any sources being impor- ted.	275
Default setting: Include digital files linked to imported records.	275
Perform auto-linking of subjects when loading Data Transfer Man- ager.	275
Media handling when exported	275
Default folder for exported media	275
Default target for creating new GEDCOMs (for export)	276
Include Unique ID with Exported Persons	276
Allow Advanced Import/Export Options to continue with a dif- ferent external file.	276
Default setting: Create Research Planning items.	276
Default template for titles of new research project.	277
Default template for purpose field in new research projects.	277
Default template for description field in new research projects.	277
Default template for comment field in new research projects.	277
Default template for titles of new research objective.	278

Default template for objective statements in new research objectives.	278
Default template for comment fields in new research objectives. .	278
Default template for titles of new research tasks.	278
Default template for description field in new research tasks.	279
Default template for comment field in new research tasks.	279
Default setting: Do not create objectives if source use is already documented.	279
Default setting: Use existing research objectives associated with source.	279
Starting folder location for GEDCOM exports.	280
Optional Template Groups	280
Country Censuses	280
Default Country Names	280
Database Backup and Recovery	281
Database Backup Options	282
Manual Database Backup	283
Database Recovery	284
List Editor	284
Searching all lists for text	286
Listing all text content for a certain field type	286
Obtaining information about field types	288
Editing the text content of a list item	288
Media Location Tool	289
Identifying Broken File Links	290
Fixing Broken File Links	290
Data Cleanup	293
License Information	293
Help Resources	294
Index	295

Preface

There is more information available to you today than at any time in history. Keeping track of all the details you find while doing family history research can become a bit overwhelming. The strength of Clooz is to serve as your own data repository for potentially useful information found in your research.

Clooz is unlike most other genealogy software which focus on people and how they connect to one another (i.e., family trees). Building family trees and family stories are most likely our ultimate objective when doing family history research. Too often though in today's world of online hints and automated suggestions we are encouraged to add people and events to our family tree without trying to determine if it really is the right person or family. Done more properly, we should gather all the information we can from documents and other sources, and then analyze it with respect to other information we have found to determine if the identities match those in our tree and the facts appear to be correct. That's where Clooz comes in. Clooz is a document-based approach to supporting family history research. It doesn't replace family tree-type programs, rather it supplements them. Clooz can serve as a repository for any of the information you find, whether it be census records, vital record documents, newspaper articles or whatever. You can move the person, events, and family structures described in an information record to your family tree program once you determine it to be applicable to your persons of interest.

Clooz has been used by genealogy researchers since 1997, when it was first developed by Elizabeth Kelley Kerstens and sold by Ancestor Detective, LLC. In 2006, version 2 of Clooz was released, and then version 2.1 in 2007. In December, 1211, Ancestor Detective announced the end of sales of the program. Joe Bissett, a Clooz user since its initial introduction, knew the potential of the program from his own genealogical research and acquired Clooz on 1 January 2012. As soon as the announcement went public, I contacted him since I too was user of Clooz with computer programming skills and had a desire to develop a document-based program for my own family

history research efforts. Together we formed Ancestral Systems, LLC, and immediately began work producing version 3 of Clooz, which was released later in July, 2012. In January, 2016, Joe retired from the company.

Now, after over 10 years of development and testing, Clooz has been completely rewritten to provide many new features using more current technologies. My main design goal was to have Clooz make it easier to follow best practice research methods (improving the quality of family histories) with an intuitive and flexible user interface. Clooz can be used many different ways. There is no single prescribed workflow, rather you should use the program in a way that feels comfortable to you and best meets your objectives.

I hope you find Clooz to be helpful in your research, whether serving as your main digital data repository or perhaps reserved for special projects. I always welcome feedback and suggestions (support@clooz.com).

Richard Thomas
President, Ancestral Systems, LLC

User Guide Notation

Topics in this user guide sometimes include items with the following special notation:



These are key points about the feature being discussed, presented this way for emphasis.



These are tips, included to show you suggested ways to use or control a feature.



These are warnings of some limitation of the feature or caution of actions to avoid.



These are notes relating to the feature. They include additional information about the feature.

Chapter 1

Getting Started

Welcome to the Clooz community. We are proud to provide you with Clooz 4, a fresh new version of our tool supporting genealogy and family history research. The program has been totally rewritten and is much more powerful than ever before, making it the biggest improvement Clooz users have ever seen. Clooz will help you organize your family history records, documents, photographs, and notes so you know what information you have and can find it quickly. Even more important, Clooz will help you review the information contained in these documents to begin the process of extracting the real evidence as it relates to the people and families in your family tree.

What is Clooz?

You're probably familiar with other genealogy software programs. You enter the names and pertinent information about people in your family, and based on their relationships to one another, build a family tree. As you are building this family tree you need to be looking at lots of documents and drawing conclusions about their relevance. Is the person in a particular document the correct person you are looking for? Inserting people into your family tree without first performing this analysis makes your effort error prone. If you are following the best practices in family history research, you are gathering all the information you can find. But often you end up with piles of paper, notes, image files, and thousands of "hints" provided by your favorite online data source. It can all be quite overwhelming. Here is where Clooz enters the picture.

Clooz is designed to support your research efforts by serving as a repository for all the information you discover and believe may be of some value to you in your research. In Clooz, it doesn't really matter whether the people included in that information end up in your family tree or not, in fact family trees aren't even something it provides. That's not its focus. It is used to help you keep track of what you are searching for, maintain the information you find and index it to provide a way to easily retrieve it later. It's an alternative to sticky notes and piles of papers, folders and binders. Information Records are the core of Clooz. There is very little you can document about a person in Clooz without first creating an Information Record. It is for that reason Clooz is considered to have an evidence-based approach. If you are attempting to research your family accurately through examination of real evidence, then Clooz is for you.

Flexibility is one of the design goals of Clooz. There are usually multiple ways of performing the same ultimate objective. Good software should provide you the capabilities to do things the way you work, not force you to adapt your work flow to what the program needs. Some users are meticulous about entering all the details from each Information Source in order to get maximum benefit, others might be using Clooz as an evidence-first way of updating their family tree software, and still others might be just wanting to use Clooz for its data organization and indexing capabilities. It's all up to you. In any case, Clooz supplements the other family-tree based software programs; it does not replace them.

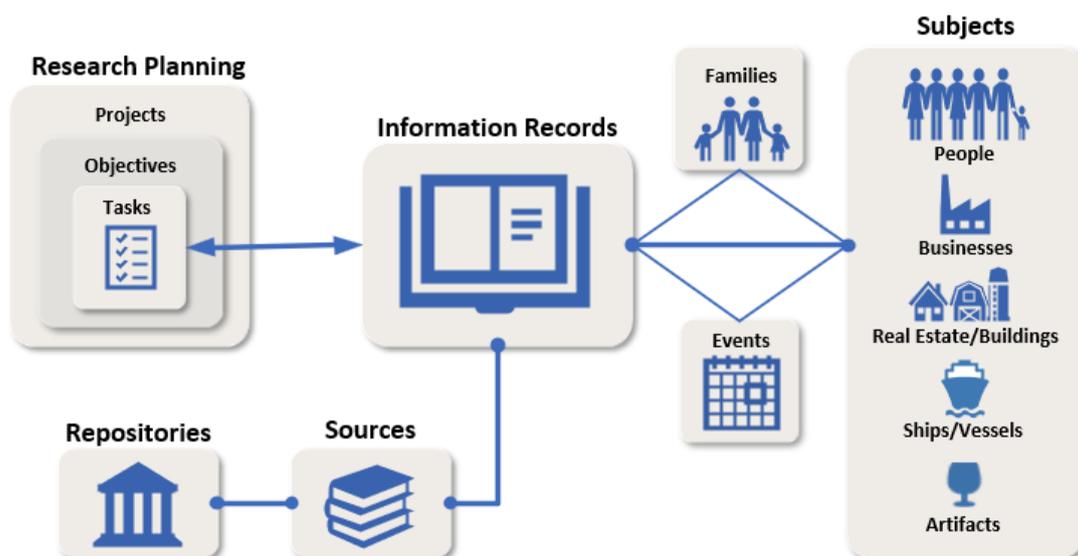
Clooz is an evidence-based approach to supporting your research effort following this general process:

- Gather all the information you have found that might possibly be useful, citing the source so that you know where you found it. No need to be concerned about whether you have the right person or not at this point. If it's a possibility, record it.
- Extract the details from each document to get all of the information it provides for each of the persons mentioned in it. What does this single information source by itself tell me about each person or family? Think of these snippets of information regarding a person being a document persona.

- Examine how the information from multiple sources may or may not fit together to fully define a person. Once you determine that the persona identified in several information sources are really the same person, merge them into one person.
- After your analysis has been sufficient for you to conclude you have the correct person in the correct family, export it into your favorite family-tree type program.

Clooz Data Organization

In this section we'll review the various types of data which you work with in Clooz.



Information Records

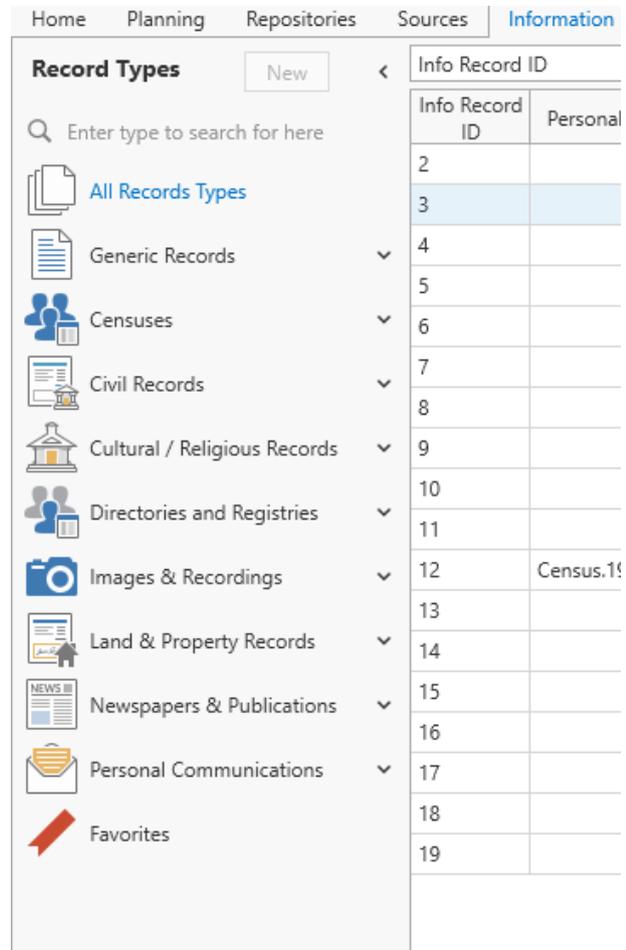
Information Records are the core of the Clooz data structure. There is not much you can do in Clooz that doesn't involve an Information Record. Information Records are where you enter the content data found in some information source, such as a document. Subjects who are mentioned in the document are linked to the Information Record and any information contained in the document is entered into this Information Record. Digital media files can also be attached to Information

Records. Data describing the information source itself is entered separately as a Source Record.

Information Record content:

- User defined identifier
- Document date
- Location (what document applied to)
- Date accessed
- User defined rating
- Description
- Subjects mentioned with information details provided, including actual name on document
- Digital media files can be attached

- Events list for any of the Subjects included given supporting data
- Family relationships between the included Subjects given supporting data
- Links to search tasks which found this Information Record



Subjects

Subjects are the objects you are researching. These are usually people, however Clooz also supports other types of Subjects such as businesses, real estate/buildings, ships, and artifacts. You link Subjects to any Information records that contain information about them. Family structures and events involving a

Subject can be created under each individual Information record (when the data supports it).



When entering Information Records, if you are unsure about the identity of a Subject (whether they are the same person as the person you are intending) it is best to create a new Subject record instead of linking to an existing one. At some later point in time when you have made a proper judgment about the two Subject records being the same person, you can merge the two Subjects into one.

The data in Subjects records are meant to be based on your best assessment of all the evidence contained in the Information Records they are linked to.

Subject Content:

- User definable fields (Alternate ID, User Field 1, User Field 2; Your own labels for User Field 1 and 2 can be set in the program Options.)
- Name fields (standardized form as desired by user)
- Subject type dependent fields

Person	Business	Real Estate / Building	Ship	Artifact
Birth Date	Business Type	Building Type	Type of Ship	Type of Artifact
Birth Location	Date Opened	Street address	Country of Registration	Maker
Marriage Date(s)	Opening Location	Former street name	Call Sign	Original Owner
Marriage Location	Date Closed	Latitude	Shipping Line/Owner	Current Owner
Death Date	Final Location	Longitude	Date - 1st Voyage	Owner Contact Info
Death Location	Owner's Name	Date Built	Date - Last Voyage	Date/Location Made
Sex		Date Destroyed		Date/Location Lost/Disposed
Still living?				Provenance



Keep in mind that artifacts (as Subjects) are something you are researching or tracking (provenance). For example, researching the history of a family heirloom. If an artifact (for example, a family Bible) is the source of some information you use, then it should be a Source. An artifact can be both a Source and a Subject.

Families and Events

Within the context of a single Information Record, you can create a family structure and define events for the linked Subjects when the information contained in the record includes family relationships or data sufficient to define an event involving the Subject. These family structures and events only reflect the data contained in this Information Record, and no other data. One of these family structures typically does not describe the whole family, just two or more people documented in this record (think of how censuses for a family evolve over the years as new children appear and older children leave the household). All of this supports the ability to view all of the family records and events related to an individual Subject across multiple Information Records, allowing correlation and consistency analysis to be done to draw conclusions and develop the complete description of a Subject.

Family record content

- Subject members (parent/child designation)
 - Parental relationships
 - Rationale
 - Informant
 - Evidence Assessment
 - Confidence Rating (User defined)
- Rationale
- Informant
- Evidence Assessment
- Confidence Rating (User defined)

Event record content

- Subject members (Primary and Witnesses)
 - Event notes
 - Rationale
 - Informant
 - Evidence Assessment
 - Confidence Rating (User defined)
- Event type
- Date
- Location
- Place Detail
- Description
- Rationale
- Informant
- Evidence Assessment
- Confidence Rating (User defined)

Sources

Source records are where you enter data about the source (ex., title, author, publishing information) to identify where the data in an Information Record came from. The data in a Source record comprise a major part of formal source citations, but not all. Some details normally included in source citations come from the Information Record. Clooz is focused on collecting the data needed for complete and accurate source citations, with the final format of source citation data left to the user as part of follow-on publishing using other software since the guidelines for citation formats can vary depending on where the data are published.

Source types:

- Book
- Certificate
- Journal
- Newspaper
- Register
- Document
- Image
- Website
- Personal Communication

Source record content:

- Title
- Label (A user controlled descriptive label to show on internal Clooz lists)
- Author or Creator
- Facility identification and call number information (filing, collection numbers, etc)
- Date accessed
- Publishing details
- User Rating (arbitrary definition controlled by user; positive stars or negative X's)
- Published URL
- Original source credit line
- Digital media files can be attached
- Links to tasks involving the source (Research Planning)

Repositories

A Repository is the facility (such as a library) or online data service (the large Internet web sites serving as a virtual libraries) where sources were found.

Repository record content:

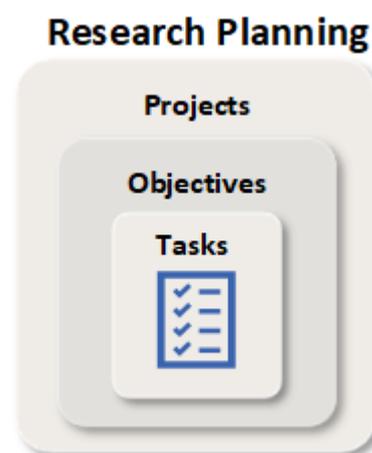
- Name of the Repository
- Standard address fields
- Email address and Home Page URL
- Digital media files can be attached
- Links to tasks involving the repository (link to Research Planning)

Research Planning

Project records are research planning efforts you define which are comprised of multiple objectives and tasks to complete them. This can be focused on a family, family line(s), lineages, pedigrees or any other overall goal of your choosing.

Project record content:

- Title
- User defined identifier
- Status with flags for completed or hidden (archived)
- Priority rating
- User defined rating
- Purpose
- Description



Research objectives are descriptions of what you are trying to accomplish as part of an overall research planning project. An objective is recommended to be a question to be answered or some other goal for which you can determine has been answered or completed. Each objective include any number of tasks detailing the activities you need to perform to complete the objective.

Research Objective content:

- Title
- User defined identifier
- Status with flags for completed and hidden (archived)
- Priority rating
- User defined rating
- Objective statement
- Knowledge known
- Hypothesis
- Conclusions
- Links to Subjects associated with this objective

Tasks are activities you need to perform while completing an objective. These are usually searches, analysis or administrative actions. You can define repositories or known sources to be searched. Resulting Information Records generated by the search can be linked to these tasks as search results.

Task record content:

- Title
- User defined identifier
- Type of task (search, analysis, or other)
- Start and Completion dates
- Status with flags for completed and hidden (archived)
- Priority rating
- User defined rating
- Search Parameters
- Task Description
- Results Description
- Default Source (for Information Records generated under this task)

Clooz Terminology

Here is a list of common terms used in Clooz and their meaning:

A

Artifact

Artifacts are one of the Subject types in Clooz. They are meant to represent physical objects that have some significance in your research or family history.

B

Building

Real estate or buildings is a Subject type in Clooz. This could be any type of property: land plot, farm, building, etc.

C

Composite View

A screen layout in Clooz similar to a grid, but containing a hierarchical structure of expandable groups of rows displayed in a parent-child type arrangement.

Context Menu

The menu window that often appears when you right-click something on the screen.

E

External File

A database or GEDCOM file independent of the currently open Clooz database. These usually support other family tree programs, although it could be a different Clooz database.

G

Grid

A screen layout in Clooz that appears like a spreadsheet, with rows and columns.

I

Information Record

Information Records in Clooz hold the content information coming from a document or other source. These differ from a Source record that contains most of the citation information describing the document, or the Repository record referring to the facility or online service where the document was found.

M

Media

A digital file containing an image, text, spreadsheet, video, audio, or any other format. These can be attached to various records in Clooz as digital representations of source document content, or as Information Records (as photographs, maps, videos, or audio independent of a specific source document).

R

Real Estate

Real estate or buildings is a Subject type in Clooz. This could be any type of property: land plot, farm, building, etc.

Repository

Where a source document or item was found. This could be a physical library facility or online data provider.

Research Objective

What you are trying to accomplish while researching some specific issue, question, or hypothesis.

Research Project

A user-defined grouping of research objectives and tasks having something in common.

Research Task

A search or analysis action to be conducted while attempting to fulfill a Research Objective.

S

Source

A source record in Clooz should be viewed as the higher level components of a source citation. Citation details are pulled from the citing Information Record.

Subject

Subjects are the objects you are gathering information about. In most cases with Clooz, this is people. However, Clooz supports several other types of subjects such as businesses, real estate/buildings, ships and artifacts.

Subject Records

These are records in the Clooz database representing the Subjects being researched, and contain summary information about the Subject such as the birth, marriage, and death dates for people.

T

Template

A pre-determined set of data fields designed to match a specific type of source document.

Examples of ways to use Clooz

Clooz is designed 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 family tree 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 features, 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, Family Historian, and Ancestral Quest).

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. She then exported the people, events and parent/child relationships via GEDCOM back to Family Tree Maker, using Family Tree Maker tools to resolve any duplication conflicts..

Finally, Joan knew that some of her ancestral lines were only partially complete. She then 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 saw a mention on Facebook to a program called Clooz. The notion of evidence-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. Frank then used his new smartphone 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. As Frank was creating Information Records in Clooz for each of the documentation items he found, he could setup any number of events and parent/child relationships for the people mentioned, at least

as things looked using that particular information source. Other documents might show conflicting event details that he would later have to evaluate.

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 somewhat limited. Then she heard the new version 4 had all kinds of new features, 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 - The Grandmother's scrapbooks

Margaret loved to collect pictures, school papers, newspaper clippings, and whatever else she could get her hands on related to her children and grandchildren. Over the years the family grew and she was finding more and more items to add to scrapbooks she had setup. Unfortunately, she had not imagined how big of a collection it would end up being, or even the number of extended family members that would ultimately be included. Her method of organizing things in annual scrapbooks was making it difficult to locate all of the relevant items for a particular person or family. She did have a friend who was a genealogy addict though, and this friend recommended using a program she used called Clooz to setup an index to all her scrapbooks. She decided to give it a try.

Margaret labeled the scrapbooks and created Source records in Clooz for each scrapbook, and then entered all of her family members into Clooz as Subjects. That was all pretty easy. The more challenging part was going through each scrapbook and creating an Information Record in Clooz for each article, photo, or other item. As part of that record she would link in the various family members who were mentioned or shown in the item. She could have digitized the items to create digital scrapbooks, but decided the indexing would be sufficient for her immediate needs. Once completed, Margaret could then view lists of all the items (and their location in

the scrapbook collection) for each person. Who knows she thought, maybe someday she'll dabble a little in her family history.

Case Study #5 - Inventory of Family Stories and Heirlooms

Francis has assembled a collection of family items that have been passed down over the years for earlier generations. A number of them had some stories associated with them, like the time Grandma Mable wore her favorite brooch to the square dance where she met Grandpa Fred, or Grandpa Barney getting in trouble for carving his initials in the stock of his dad's shotgun. She saw Clooz was now supporting artifacts as a Subject type, so she decided it was a good way to organize all the information.

She created Information Records for each of the family stories and cited the Source of where she heard or read about the episode. She then linked the Subject records for all the people in each story to the record, along with the Subject record for the artifact itself. Now she could easily list all the artifacts a particular person was involved with, or all the people who had some interaction with an artifact. After dealing with all the artifacts she had, she kept on adding stories and linking the appropriate people to them. This was really helping to bring her family history alive.

Using Clooz the first time

Learning how to use a new program can be overwhelming, especially when its approach is as different as Clooz is from typical genealogy programs and is rich in features. Using Clooz need not be difficult. This section will describe a few basic steps you can take when first using Clooz to get you oriented.

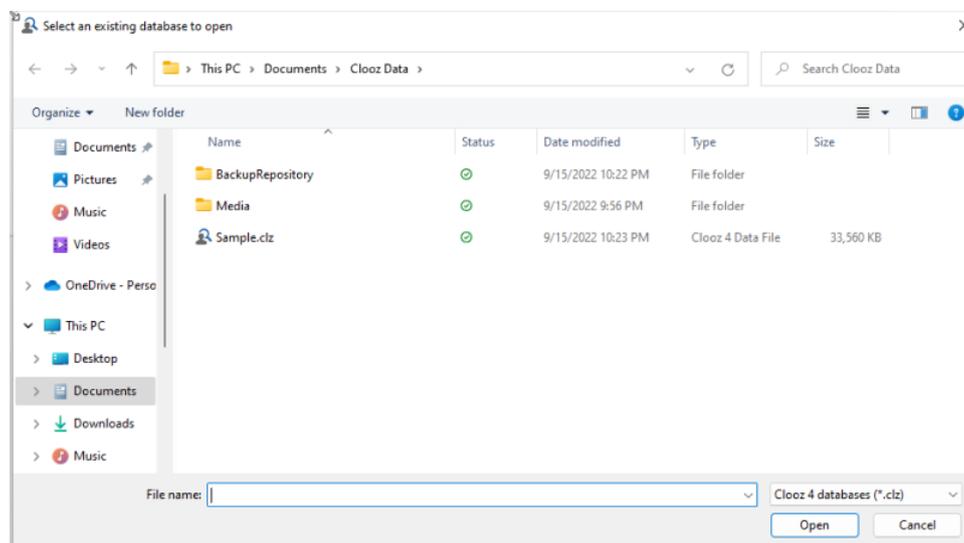
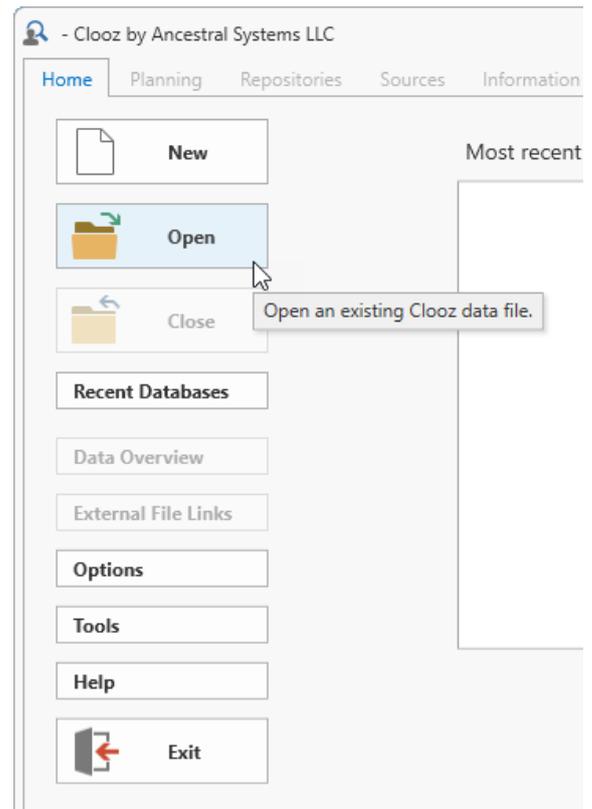
Steps to follow when using Clooz for the first time

Perhaps you are using Clooz for the first time. Here are a few steps to help you get oriented and start your first Clooz database:

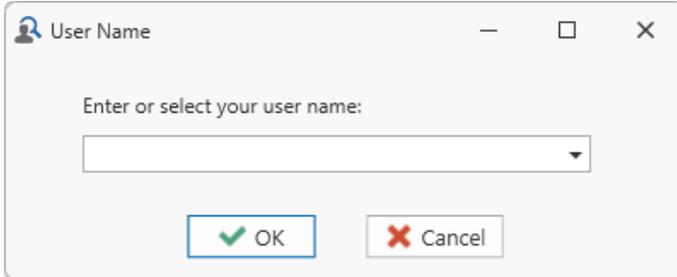
1. Install the Clooz program, if not already installed on your computer. It's much the same as any standard Windows program. [Step by Step instructions are available](#). On running Clooz the first time it will request you to enter your serial number (received when you purchased a Clooz user license). If you already have Clooz installed using a trial serial number, just enter your paid serial number when requested, or go to the Clooz license information screen under the Home tab, Tools.

2. Start up Clooz. Clooz stores its data in database files, much the same way that word processors save information in various document files, or spreadsheet programs save information in spreadsheet files. As a first step, open the Sample.clz database provided during the Clooz installation in the Clooz Data folder within your main Documents folder.

To open a database, click on the Home tab if not already selected. Then click on the *Open Database* button and select the Sample.clz database file from the window that pops up.



- 3. When opening a database the first time in Clooz, you will be requested to enter a User Name. This can be any name you desire. Clooz will be using it when tracking who is modifying the data.

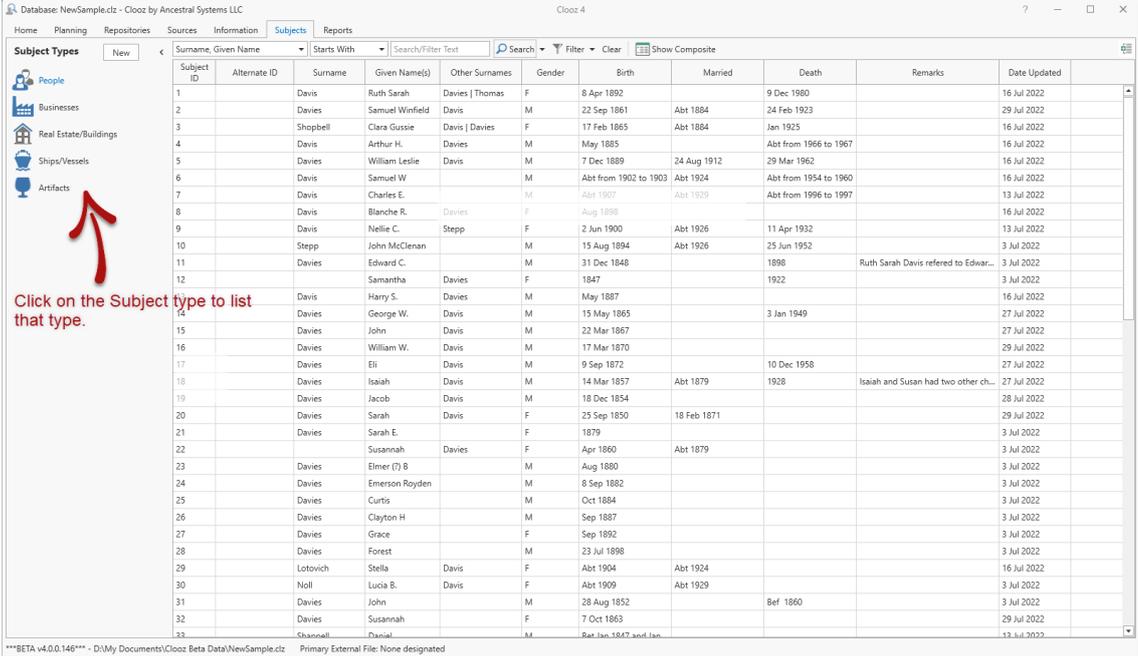


- 4. After opening the Sample.clz database, you will automatically be switched to the Information Systems Records tab (you can customize the start-up tab selection in the program options later). The tabs on the top will switch you to that screen. Click on the Subjects tab. Subjects in Clooz are what you are gathering information about (your research subjects). They are usually people, but could also be businesses, real estate (or buildings), ships or artifacts.

Most of the main tabs in Clooz show the same overall layout, although the data contained will be different. Here is what we call the various screen components:



5. Select the type of Subject you want to see in the main data area by clicking on the type in the Navigation Panel.

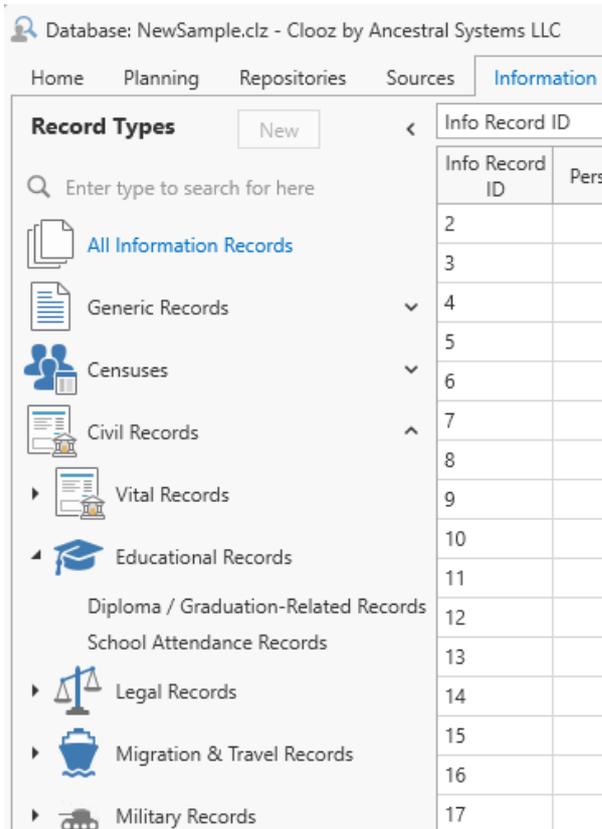


The screenshot displays the Clooz 4 application window. On the left, a navigation panel titled 'Subject Types' is visible, with a red arrow pointing to it and the text 'Click on the Subject type to list that type.' The main area shows a table of subject records with columns for Subject ID, Alternate ID, Surname, Given Name(s), Other Surnames, Gender, Birth, Married, Death, Remarks, and Date Updated. The table contains 33 rows of data, including names like Ruth Sarah, Samuel Winfield, Clara Gussie, Arthur H., William Leslie, Samuel W., Charles E., Blanche R., Nellie C., John McClellan, Edward C., Samantha, Harry S., George W., John, William W., Eli, Isaiah, Jacob, Sarah, Sarah E., Susannah, Elmer (T) B., Emerson Royden, Curtis, Clayton H., Grace, Forest, Lotovich, Stella, Lucia B., John, and Susannah.

Subject ID	Alternate ID	Surname	Given Name(s)	Other Surnames	Gender	Birth	Married	Death	Remarks	Date Updated
1		Davis	Ruth Sarah	Davis Thomas	F	8 Apr 1892		9 Dec 1980		16 Jul 2022
2		Davis	Samuel Winfield	Davis	M	22 Sep 1861	Abt 1884	24 Feb 1923		29 Jul 2022
3		Shoppbell	Clara Gussie	Davis Davis	F	17 Feb 1865	Abt 1884	Jan 1925		16 Jul 2022
4		Davis	Arthur H.	Davis	M	May 1885		Abt from 1966 to 1967		16 Jul 2022
5		Davis	William Leslie	Davis	M	7 Dec 1889	24 Aug 1912	29 Mar 1962		16 Jul 2022
6		Davis	Samuel W.		M	Abt from 1902 to 1903	Abt 1924	Abt from 1954 to 1960		16 Jul 2022
7		Davis	Charles E.		M	Abt 1907	Abt 1929	Abt from 1996 to 1997		13 Jul 2022
8		Davis	Blanche R.	Davis	F	Aug 1898				16 Jul 2022
9		Davis	Nellie C.	Stepp	F	2 Jun 1900	Abt 1926	11 Apr 1932		13 Jul 2022
10		Stepp	John McClellan		M	15 Aug 1894	Abt 1926	25 Jun 1952		3 Jul 2022
11		Davis	Edward C.		M	31 Dec 1848		1898	Ruth Sarah Davis referred to Edward C.	3 Jul 2022
12			Samantha	Davis	F	1847		1922		3 Jul 2022
13		Davis	Harry S.	Davis	M	May 1887				16 Jul 2022
14		Davis	George W.	Davis	M	15 May 1865		3 Jan 1949		27 Jul 2022
15		Davis	John	Davis	M	22 Mar 1867				27 Jul 2022
16		Davis	William W.	Davis	M	17 Mar 1870				29 Jul 2022
17		Davis	Eli	Davis	M	9 Sep 1872		10 Dec 1958		27 Jul 2022
18		Davis	Isaiah	Davis	M	14 Mar 1857	Abt 1879	1928	Isaiah and Susan had two other children.	27 Jul 2022
19		Davis	Jacob	Davis	M	18 Dec 1854				28 Jul 2022
20		Davis	Sarah	Davis	F	25 Sep 1850	18 Feb 1871			29 Jul 2022
21		Davis	Sarah E.		F	1879				3 Jul 2022
22			Susannah	Davis	F	Apr 1860	Abt 1879			3 Jul 2022
23		Davis	Elmer (T) B.		M	Aug 1880				3 Jul 2022
24		Davis	Emerson Royden		M	8 Sep 1882				3 Jul 2022
25		Davis	Curtis		M	Oct 1884				3 Jul 2022
26		Davis	Clayton H.		M	Sep 1887				3 Jul 2022
27		Davis	Grace		F	Sep 1892				3 Jul 2022
28		Davis	Forest		M	23 Jul 1898				3 Jul 2022
29		Lotovich	Stella	Davis	F	Abt 1904	Abt 1924			16 Jul 2022
30		Noll	Lucia B.	Davis	F	Abt 1909	Abt 1929			3 Jul 2022
31		Davis	John		M	28 Aug 1852		Bel 1860		3 Jul 2022
32		Davis	Susannah		F	7 Oct 1863				29 Jul 2022
33		Shannon	Daniel		M	Pat Jan 1847 and Jan				12 Jul 2022

Subject records are where you save your preferred name for each person (or other subject type), and other vital event dates and locations you have concluded to be correct based on all the information you have gathered in your research. The details provided by the various documents supporting this are entered as Information records (a different tab).

6.



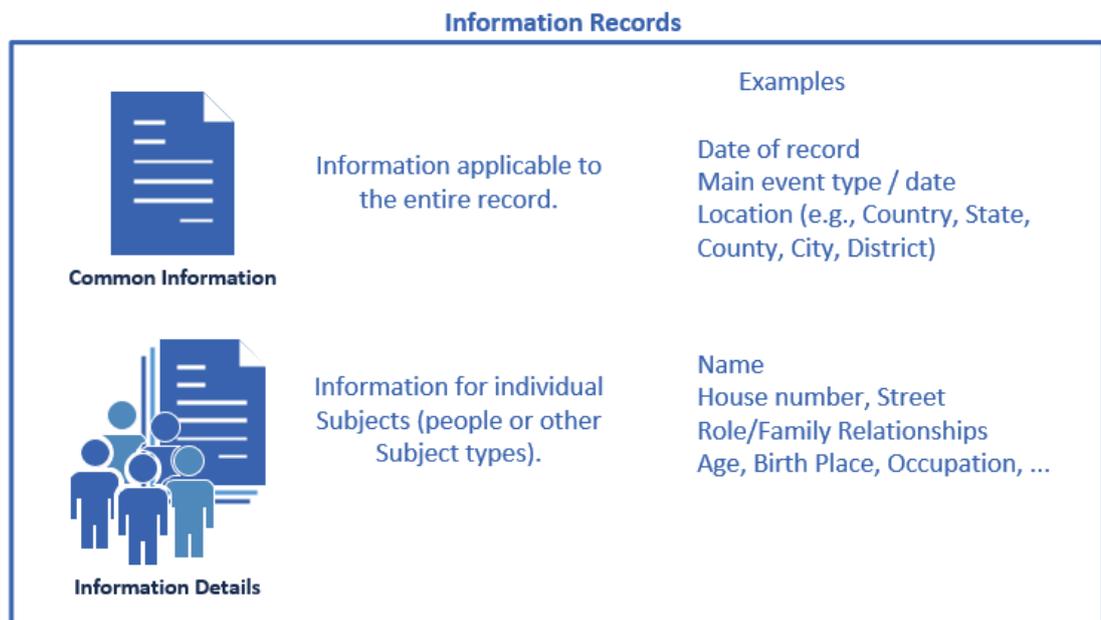
Click on the Information tab to see the list of Information records. This is where you keep information found in documents, books, websites, or any other type of information source. Higher-level citation information will be saved in Source records (another tab).

The Information Record tab is one of several features where you will spend most of your time. There are editing templates (Navigation Panel on left side of main window) for various document types. The individual templates are grouped into categories. Click a template or

category to see those types of Information Records in the main list.

Clicking on a category also opens up a list of templates (or other more specific categories). Click on Civil Records to see the list of categories it contains, and then Education Records to see specific template types.

7. Information records consist of two main components: Common Information and Information Details.



When editing an Information record, the template will be showing each of these components in separate areas.

To edit an Information record, double click the record in the main list or right click and select *Edit Item* from the menu that pops up.

8. Here is an example of editing an Information record. First click on *All Record Types* in the Navigation Panel to show all records in the main list. Now double click on record 13, a Military Service Record.

Database: NewSample.clz - Clooz by Ancestral Systems LLC

Information Record Editor --- Draft and Enlistment Records / Document ID: 13

Personal File ID: Document Date: 5 June 1917 Document Number: 157 (stamped...)

Document or Source Area of Coverage:

Country: US State/Province: Pennsylvania County: Northumberland C... Parish:

Township: City: Draft Board: 3

Date Accessed: 17 Jul 2022 User Rating: ☆☆☆☆

Document Description:

Common Information

Subject List: (Double click subject to edit details)

Subject Type	Subject ID	Alt. ID	Page	Line	Subject's Name	Name as in document	Role	Primary?	Details
Person	46				William E Thomas	Wm Edgar Thomas		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Show Details for Selected Subject

Subjects List

Source

Source for this record (select one, or leave blank for new source):
US, World War I Draft Registration Cards (Ancestry)

Repository: Ancestry

Source Type: Document

Source ID: 13

Location (if Owned):

Source Name: US, World War I Draft Registration Cards (Ancestry)

Source Title: U.S., World War I Draft Registration Cards, 1917-1918

Source Creator:

Item Number:

File Number:

Collection No.:

Cost (if Purchased):

File or Collection:

User Rating: ☆☆☆☆

Quick Capture Remarks Source Media

Save and Start New Info Record Save Record Cancel

v4.0.146 - D:\My Documents\Clooz 4 Data\NewSample.clz Primary External File: None designated Editing: Information Record

This is an example of a Form-based template. It is most similar to the format used in Clooz 3. You select the Subject and then the *Show Details* button to see their information (or simply double-click on the Subject row). The fields for their detailed information will now appear in the top panel of the window. You can return to the Common Information by clicking the *Show Main Information Record Form* button, or select another Subject if there is one.

The screenshot displays the 'Information Record Editor' interface. The main form is filled with data for a subject named William Edgar Thomas, born on June 22, 1890, in Shamokin, PA. The 'Subject List' table below the form contains one entry for William E Thomas. A red circle highlights the 'Show Main Information Record Form' button. The right-hand panel is the 'Source' tab, showing details for a source titled 'US, World War I Draft Registration Cards (Ancestry)'.

Subject Type	Subject ID	Alt. ID	Page	Line	Subject's Name	Name as in document	Primary?	Details?
	46				William E Thomas	Wm Edgar Thomas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

There are a number of powerful features in the right-side panel. There are tabs for each one. We'll introduce a couple here to get you started, but you'll need to see the additional help topics related to them for further details.

Initially, the Source tab is selected. This is where you can select an existing Source providing a higher-level citation describing where the information in this record came from, or even create a new Source record. These are the same fields available in the editor under the main Source tab (main Clooz screen).

- Click on the Subject tab in the right-side panel. You can now edit the Subject Record for the Subject who is currently selected in the list of Subjects.

Database: NewSample.c1z - Clooz by Ancestral Systems LLC

Information Record Editor --- Draft and Enlistment Records / Document ID: 13

Page(s): Line Surname: Thomas Given Name: Wm Edgar Title (prefix): (eg, Dr.) Title (suffix): (eg, Jr.)

Role: Primary?

Birth Date: 22 June 1890 Birth Place: Shamokin, Pa, U.S. Sex: Age: 27 Race: Caucasian

Marital Status: Widower Dependents: 1 child Next of Kin: Next of kin's relationship to soldier:

Most recent residence: House No.: 1003 Street: W. Mulberry City: Shamokin Township: Parish:

County: Northumberland C... State/Province: Pennsylvania Country: US

Civilian Occupation: Hoisting Engin... Employer: P&R C&I Co, Shamokin... Education: Religion:

Height: Short Weight: Medium Hair Color: Brown Eye Color: Brown Complexion:

Father: <Given name(s)> <Sur... Mother: <Given name(s)> <Sur... Date of Entry to service: Place: Military Grade/Rank:

Means of Entry: Enlisted / Draft... Military Service Number: Military Unit: Military Organization:

Subject List: (Double click subject to edit details) Show Main Information Record Form

Subject Type	Subject ID	Alt. ID	Page	Line	Subject's Name	Name as in document	Role	Primary?	Details
	46				William E Thomas	Wm Edgar Thomas		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Subject Information:

Surname: Thomas Given Name: William E

Prefix: Suffix:

Nickname: Alias:

Married Names:

Sex: Living?

Alternate IDs:

User Field 1:

User Field 2:

Birth Date: Bet Jan 1890 and Jan 1891 Location: Pennsylvania

Marriage Date(s): Location:

Death Date: Location:

Contact Information: Address: Phone: Email:

Remarks:

Subject Type: Person

Copy selected subject's details

v4.0.0.146 - D:\My Documents\Clooz 4 Data\NewSample.c1z Primary External File: None designated Editing: Information Record

Remember that the Subject record is your overall record for this person (versus the set of information presented in a single document). As you accumulate information you draw new conclusions and keep the Subject record up to date. You should enter the actual name (and spelling) shown in the document in the Information Record details for this person, and your preferred proper name form (birth name) in the Subject fields.

10. Clicking the Media tab will show what digital media files are attached to this Information Record. Digital files can easily be linked by dragging and dropping them into this panel.

The screenshot shows the 'Information Record Editor' window for 'Draft and Enlistment Records / Document ID: 13'. The 'Media' tab is active, displaying a list of media items. The first item is 'Wm E Thomas WW1 Draft Reg.jpg'. A red arrow points to the thumbnail image of this item. Below the arrow, a red text box contains the instruction: 'Click image to display the media viewer.' The main form on the left contains personal and military information for William E. Thomas, including birth date (22 June 1890), birth place (Shamokin, Pa., U.S.), age (27), and race (Caucasian). The 'Subject List' table below the form shows one entry for William E. Thomas.

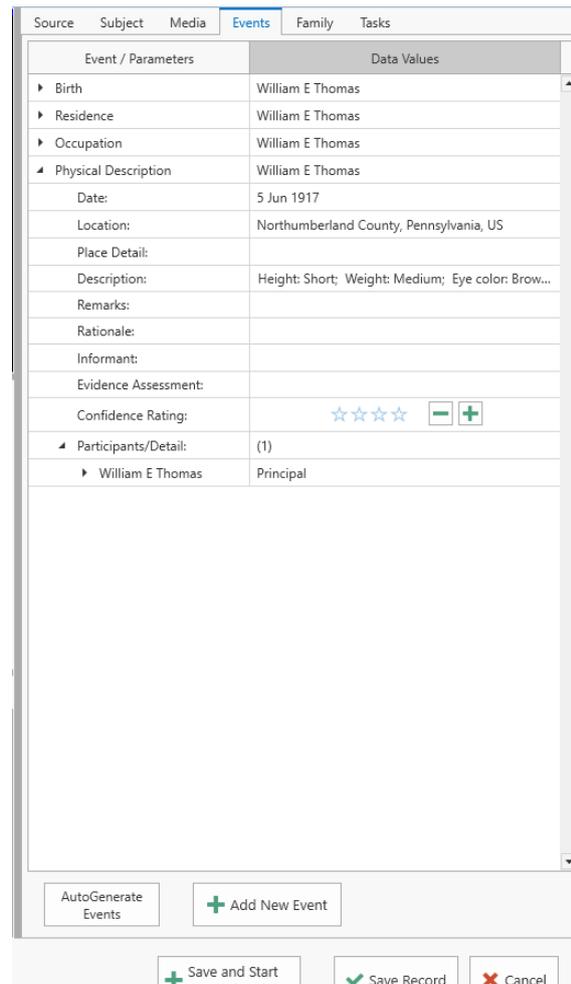
Subject Type	Subject ID	Alt. ID	Page	Line	Subject's Name	Name as in document	Role	Primary?	Details
Person	46				William E. Thomas	Wm Edgar Thomas		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To activate the internal Media Viewer in Clooz, just click on the media item's thumbnail image. The Media Viewer has many features itself, and is covered in other help topics.

This screenshot shows the same software interface as the previous one, but with the media item 'Wm E Thomas WW1 Draft Reg.jpg' now displayed in a large preview window on the left side of the interface. The preview window shows a historical document titled 'REGISTRATION CARD AND REGISTRATION REPORT' with handwritten entries and signatures. The main form and 'Subject List' table remain visible in the background.

11. The Events tab is where you can extract any number of events from the Information record. The idea here is that you are only describing events that are entirely supported by information in this record. The event information may ultimately conflict with events described in other Information records. Contracting and comparing all of these events in the end is what allows you to develop an accurate and reliable family history.

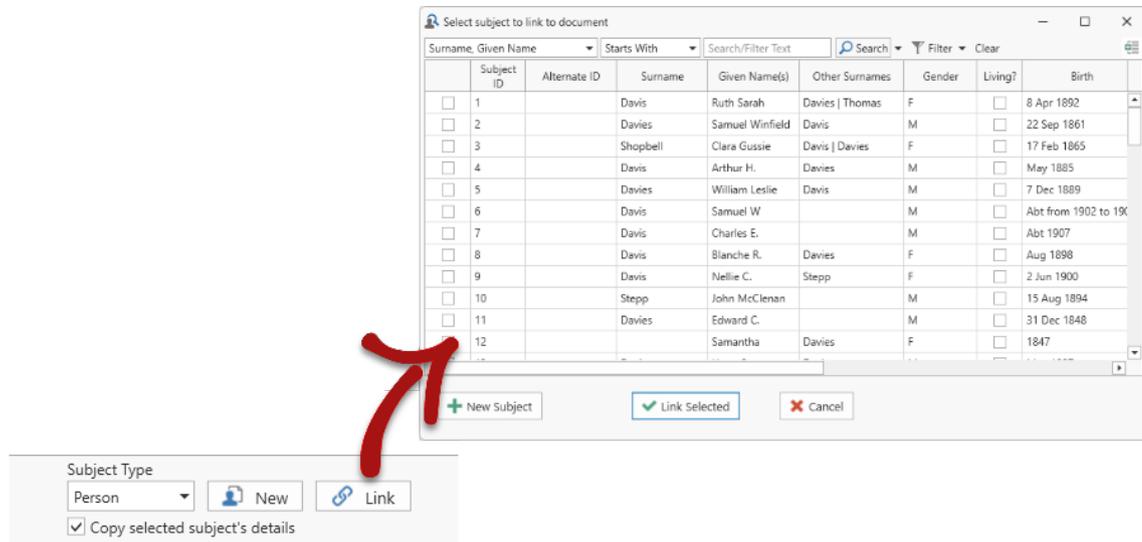
Click the AutoGenerate Events button to have Clooz attempt to identify events. In cases where insufficient data exists or human insight is required, click the Add New Event to add an event. Additional commands are available in the right-click context menus.



The Family tab is similar where you can designate parent-child relationships within family units.

In both of these tabs remember to only include items where the evidence in this specific Information Record alone supports them.

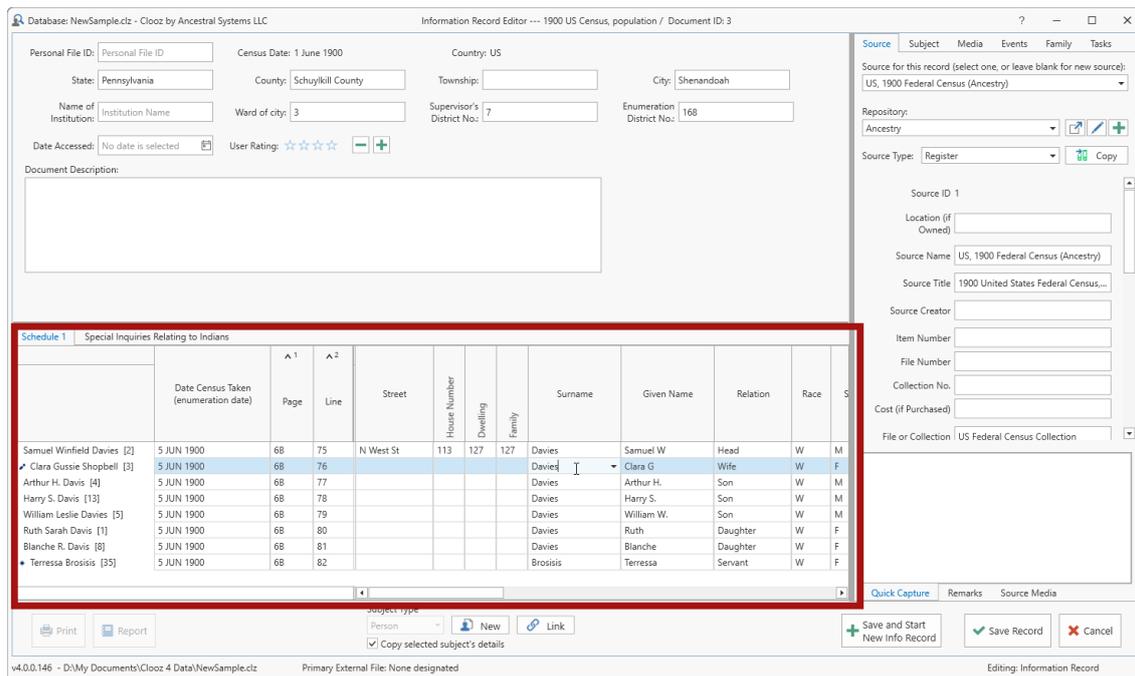
12. To add a Subject to the Information record, select the desired Subject Type at the bottom of the editor window and then click on New (to add a new blank Subject) or Link (to select an existing Subject from the list that pops up).



13. Finally, when you are finished editing click the *Save Record* button if you made changes or *Cancel* to close the editor.

- Tabular record types, such as censuses and church record books, have editor templates that are grid-based. Instead of having a form type layout of fields, there is a spreadsheet like layout where each Subject occupies one row along with their data.

For an example of this editor format, double-click Information record 3 on the main list of Information records, which is a 1900 US Census. The grid columns match the actual census forms and the grid can be edited directly.



The rest of the editor works the same as the form-based layout.

- Explore the different main tab screens and exercise the editor in each by editing records in this sample database. You can experiment by creating new records as well. Become familiar with how the editors are organized, with data common to the entire record in the top section. Most editor types have side panels on the right side which allow you to display and edit additional related information. Check out the additional help topics as you discover new features.

16. When you've explored enough and believe you are ready to start working on your own data, you first need to create a new database file to hold your information. You can do all your work using this one database file, or divide it up as necessary into as many database files as you need. To create the new database, go to the Home tab and click on the New button. You will then have to enter the name and location of this file you want to setup. We recommend keeping all your Clooz files in the Clooz Data folder, but that's up to you. Once named and created, your database is now ready and you are ready to start adding information to what is first appearing as a bunch of blank screens.

Tips for using Clooz

Here are some tips to make it easier for you as you use Clooz:

- Spend some time experimenting with the Clooz sample.clz database to gain an understanding of how Clooz is structured and how things work.
 - Keep your main focus on the documents or other sources of information you are going to enter. Most work in Clooz centers around the Information Records you create to hold the contents of these information sources. You'll add the people the information covers as part of that.
 - Don't replicate your complete list of people from other genealogy programs you use in Clooz as a first step. Build the connections between Clooz and your family tree program as you go.
-

- There is no right or wrong way to use Clooz. Use Clooz in the way that feels most comfortable and natural to you.
 - Like most advanced software, Clooz has many subtle features. You don't need to know many of them to get started. You'll learn them as you go. Don't be overwhelmed at the start.
 - Think about what you hope Clooz will be helping you with, which helps to develop a strategy on how to proceed:
 - As a research tool - Your top priority should be to enter information from new sources or information you have not really assessed or entered into your family tree program; i.e., don't try to enter all the documents you ever found related to areas of your family tree that have been well developed, as that will lead to burn out. When entering information records, include as much of the details from each as possible. The more details you enter, the more Clooz can do.
 - As part of a family tree re-do - Most of us have experienced the realization that our family tree has some issues, and see the need to re-do it from the start. For a strict re-do, don't import all your family tree people to relink to the information records you create. This leads to jumping to conclusions rapidly which is probably what caused the issues you are trying to get rid of. You should be performing a proper reevaluation of the evidence and creating new people in Clooz based on that data. In the end you can see how these people line up against what you had in your family tree originally.
-

- As an indexing system - Perhaps you just want to have an index of names to information sources, providing their physical location in files or digital copies on your computer. If this is your goal, entering all the details for various information records may not be necessary. You would at least want to establish an information record for each item, attach any digital media files, and link the subjects to it. Some of the advanced features in Clooz will not be effective without the details, but it still serves as a powerful index to your library of information. You could also take a hybrid approach where you only enter the information details you are interested in, such as people's ages, relationships, locations, etc.

You've now been introduced to a few basic steps that should help you get oriented with Clooz and started on your research. We've just touched the surface of what are lots of features and capabilities. Use the explanations, tutorials, and videos in the Clooz help resources to guide you the rest of the way.

Questions or Issues

We place a high priority on answering user questions and resolving issues they may be having when using Clooz, and welcome feedback or suggestions on how the program might be further improved. Simply send us an email at support@clooz.com. You normally will receive a response within 24 hours

If you are having an issue with Clooz 4, please provide us the details on what you were attempting to do and how you were attempting to do it (command used, etc.). In that way we can more rapidly tell you what to do.

New in Clooz 4 is a feature where Clooz will ask you to send a report back to us if it experiences an error condition. We try our best to provide bug-free software, but as you probably have experienced, any computer program is likely to experience an issue at some point or another. If you see such a popup window, please send in the log file requested (it contains no personal information or data content from your research). Adding your email address allows us to contact you if we have additional questions. Obtaining this information allows us to correct it in a timely manner. We cannot fix issues we don't know exist.

More Information

If you are looking for additional information regarding Clooz, try entering some key words in the Search box at the top of Clooz's online Support Resources. The Support Resources web pages provide numerous help topics, tutorials, and video to help you in your use of Clooz.

Looking for more general information? Here is a list of some publications we recommend. Many of these have served as inspiration in the design of Clooz 4.

Recommended Information Sources

Category	Publication Reference
Organization Strategies	Smith, Drew. <i>Organize Your Genealogy, Strategies and Solutions for Every Researcher</i> . Cincinnati, Ohio: Family Tree Books. amazon.com
Research Approach and Standards	Numerous online articles and books related to the Board for Certification of Genealogists ' "Genealogical Proof Standard (GPS)", which has evolved into an updated set of research standards.
Research Planning and Approach	Elder, Diana, AG, with Nicole Dyer. <i>Research Like a Pro: A Genealogist's Guide</i> . Highland, Utah: Family Locket Books, 2018. familylocket.com
Evidence Analysis	Jones, Thomas W. <i>Mastering Genealogical Proof</i> . Arlington, VA: National Genealogical Society, 2013. ngsgenealogy.org
	Anderson, Robert Charles, FASG. <i>Elements of Genealogical Analysis</i> . Boston, Massachusetts: New England Genealogical Society, 2014. AmericanAncestors.org
Evidence Analysis and Source Citation	Mills, Elizabeth Shown. <i>Evidence Explained: Citing History Sources from Artifacts to Cyberspace</i> . Baltimore, Maryland: Genealogical Publishing Company, Inc., 2012. evidenceexplained.com
Source Citation	Jones, Thomas W. <i>Mastering Genealogical Documentation</i> . Arlington, VA: National Genealogical Society, 2017. ngsgenealogy.org
Technical: Data Model	GenTech , a division of the National Genealogical Society. "GenTech Genealogical Data Model" [Data Model 1.1 (MS Word)] [Diagram 1.0 (PDF)] [Process 1.0 (PDF)]
GEDCOM Specifications	FamilySearch GEDCOM, Specifications. gedcom.io

Chapter 2

Managing Your Data Files

When using Clooz, it is using data files stored on your computer. These files will be one of two types:

- Clooz database where all of the data you enter is stored, and
- Digital media files on your computer you have linked to records in Clooz.

Clooz stores its data in a database file (file extension .clz) on your computer. Your first step will be to start your own database, and on subsequent work sessions, reopen that database to add additional information. All of these functions are available on the *Home* screen. The recommended location for saving these files is the *Clooz Data* folder setup in your *Documents* folder during installation, although you can use another folder if you choose. If you want Clooz to always use a different data folder you can change the default folder location in the program *Options* ([Default Data Folder Location](#)).

Although all of the Clooz data is stored in the database, it only stores links to the digital media files you link to Clooz records. During installation, a *Media* folder is setup in the *Clooz Data* folder to hold these attached files. When you link to a media file, Clooz saves the current location of the file. The file is not copied automatically to the *Media* folder.



Keeping all of the attached media files within the same folder hierarchy will make it easier to maintain and possibly move to another computer when the need arises.

Since this file holds all of the data you enter into Clooz, it is critical you protect it by following an appropriate backup process. Clooz provides backup functions if you do

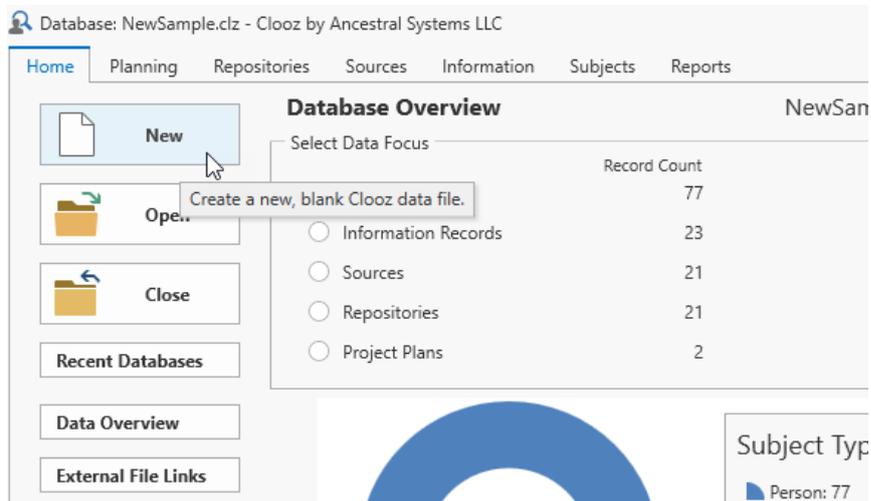
not have automatic backup features running on your computer. A *BackupRepository* folder has been setup to hold these backups as a default location. Configure your backup locations and arrangements in the Clooz program *Options*.



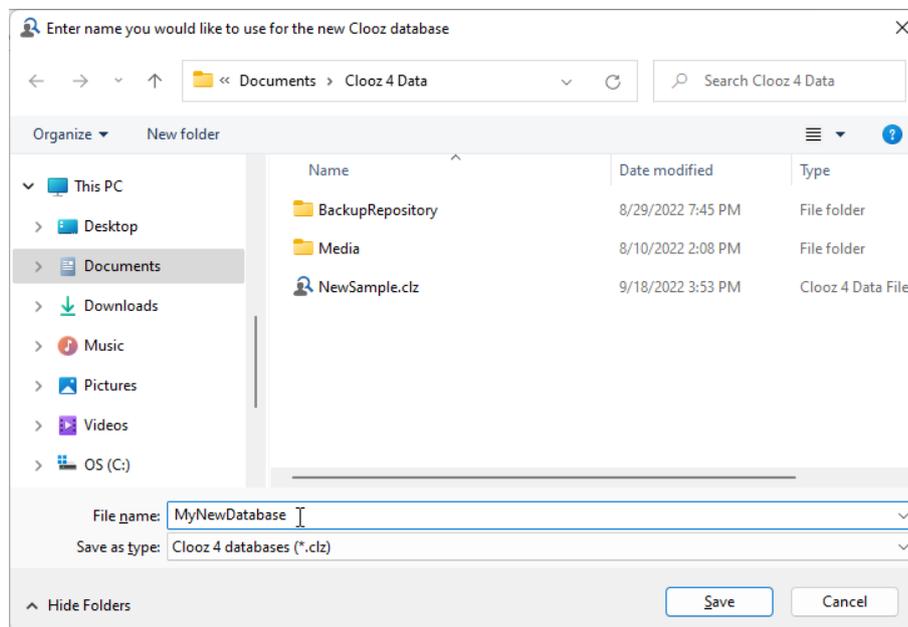
Whether you backup the Clooz database using Clooz's backup or some other backup, it is always best to save the backup copy on a different drive. Better yet would be another physical location, such as by using an online storage location.

Creating New Database

To create a new (blank) Clooz database, click on the Home tab if it is not already selected. Then click the New button.



A file selection dialog window will appear for you to name the new database and choose its location.



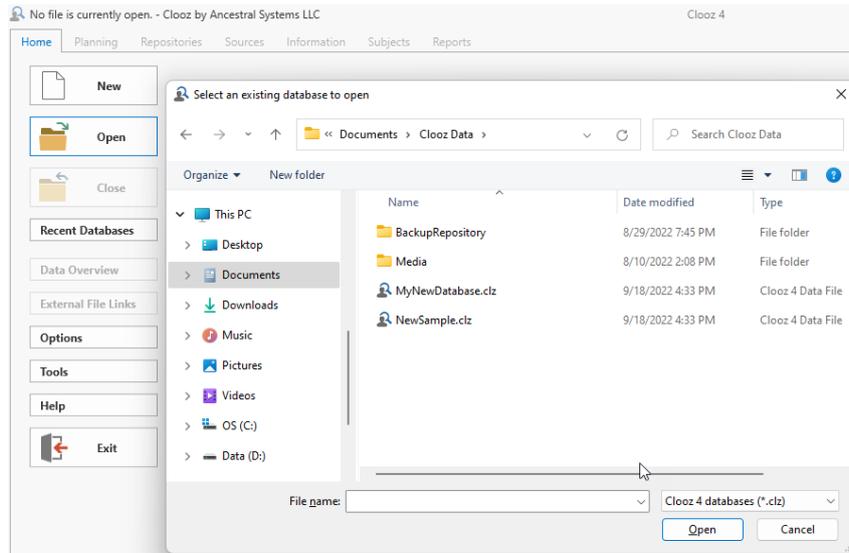
Click the Save button and your new database will be setup.

Opening an Existing Database

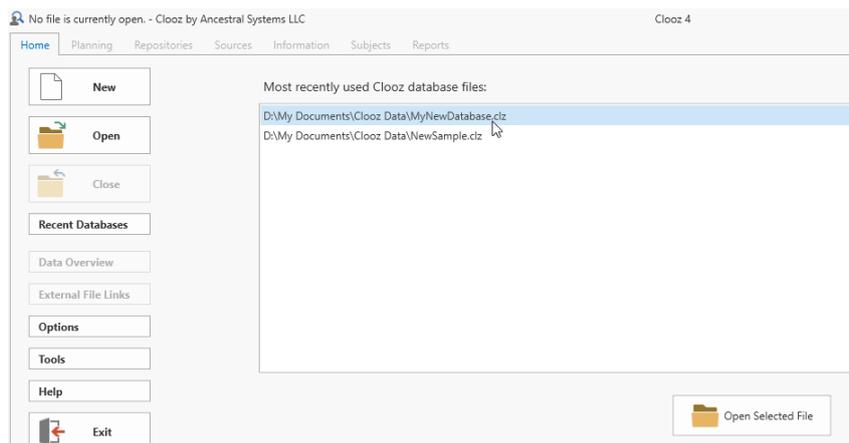
If the *Home* tab is not already selected, click it.

Clooz provides a number of ways to open an existing version 4 database:

1. Clicking the *Open* button (which brings up a file selection dialog),

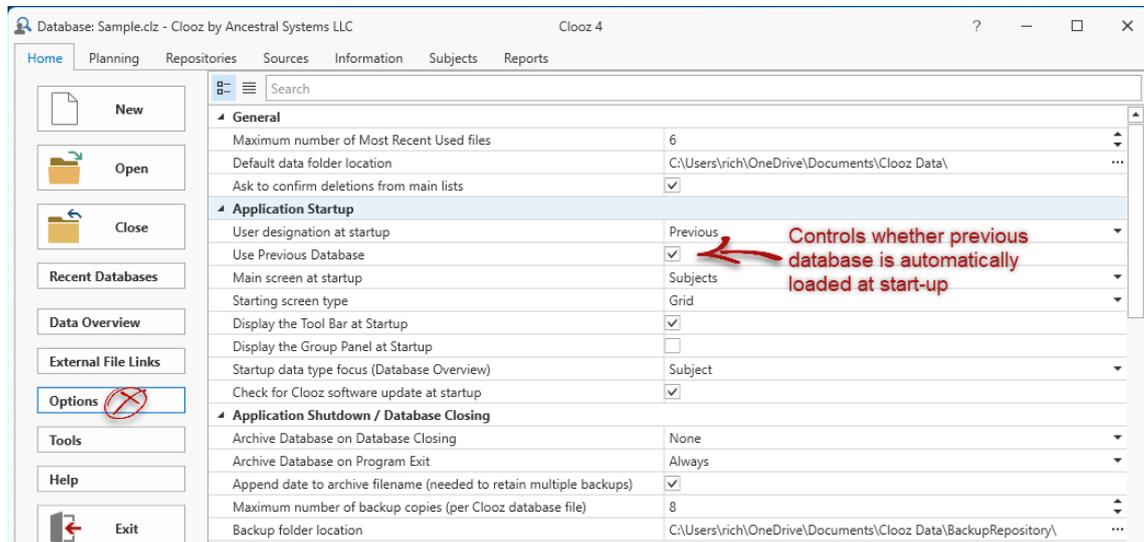


2. Selecting a file in from the *Recent Databases* list, or



Either double-click on the desired file, or select one and click the Open Selected File button.

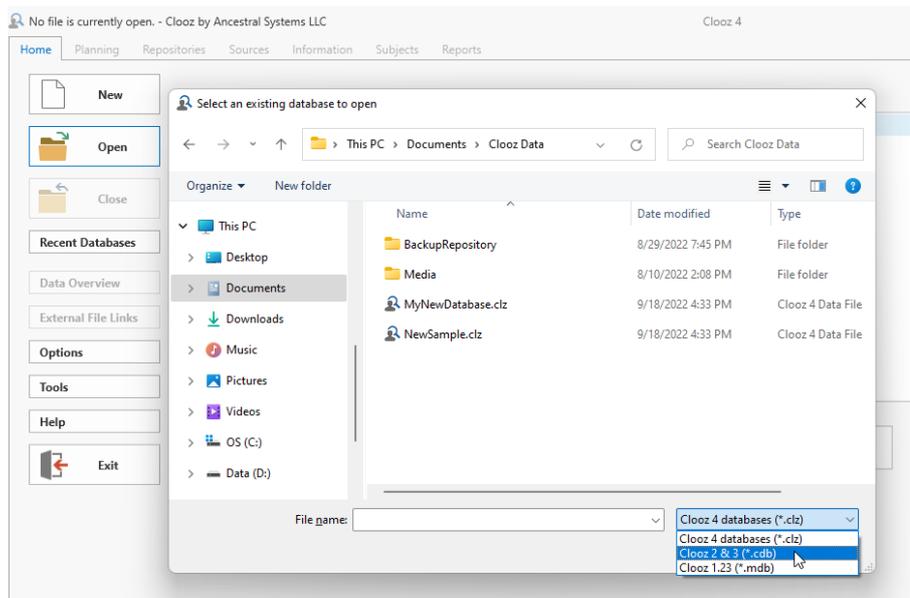
3. Configuring the program Options to always open the last file opened when starting Clooz.



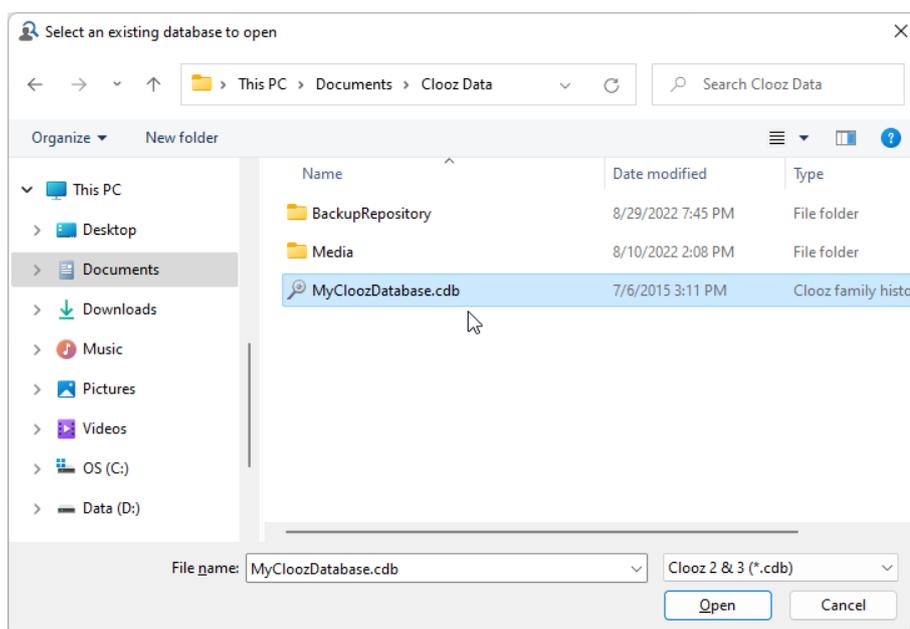
Open a Database from a Previous Clooz Version

To open the database from a previous version of Clooz (versions 1-3), click the *Open* button on the *Home* tab screen.

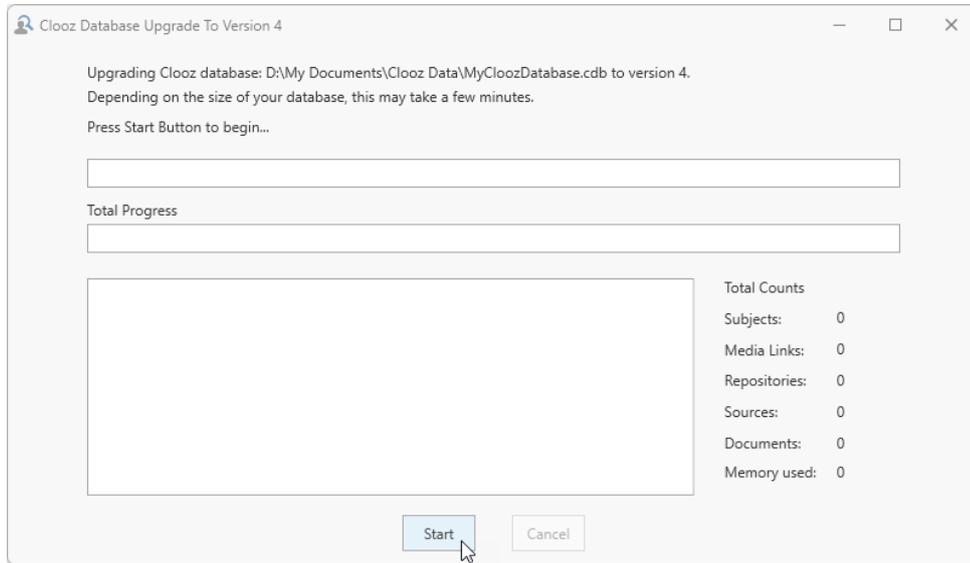
When the file selection dialog window appears, change the file type to the appropriate version.



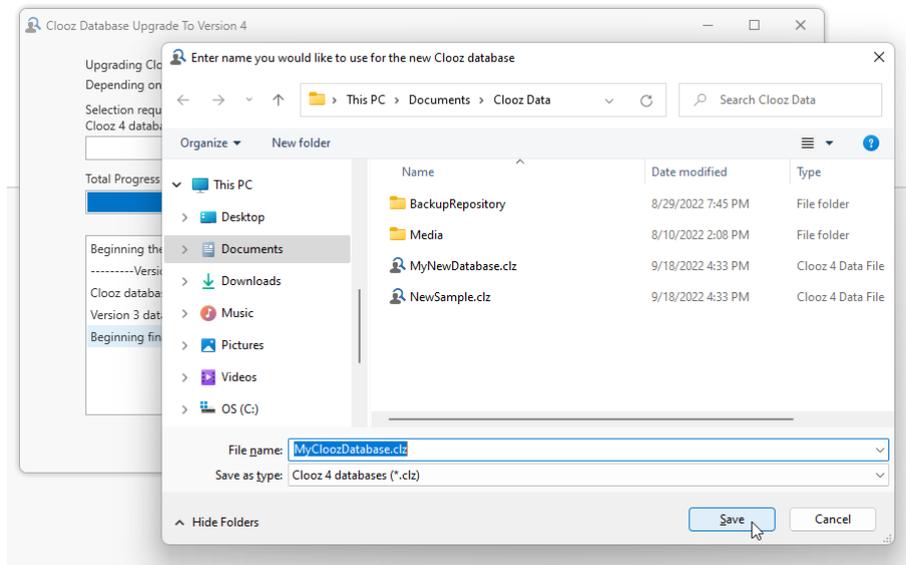
When the desired file is selected, click *Open*.



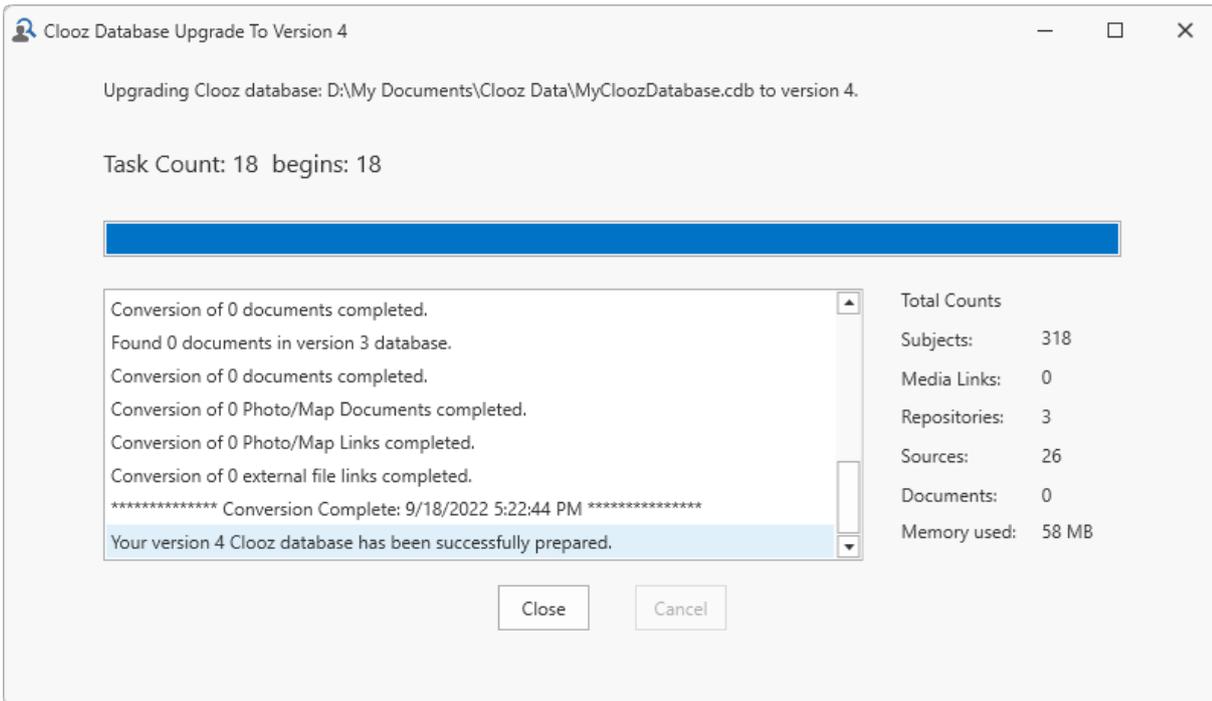
The upgrade window will appear. Click Start to begin the upgrade process.



Clooz will then have you designate the name and location of the upgraded file. The existing (old version file) is not modified during the upgrade process. A default filename the same as the old version (but with the new .clz extension) is shown.



The upgrade window will provide status information during the upgrade. When complete, click the Close button when you are ready to start working with the upgraded data in whatever tab you have set as the start-up tab (default is the Subject tab).



Clooz version 2 used two database files, one with .cdb extension, and the other with a .fdb extension. You should select the file with the .cdb extension, with the .fdb file in the same directory. Clooz might ask you to also locate the .fdb file if the file locations are not the same as when they were last used (in Clooz version 2).

Relocating Clooz to a New Computer

You've have a new computer and you want to relocate Clooz to it from your old system. Just follow these steps:

1. Before any major computer system work, always make sure you have a backup copy of your data on a separate device (USB thumb drives are useful for this). You can just copy the files as is or first compress the database files using the built-in features of Clooz to perform backups. Clooz databases have the following file extensions:

Version #	File Extension(s)	Backup File Extension
4.x	.clz	.clzbu
3.x	.cdb	.zip
2.x	.cdb & .fdb	
1.x	.mdb	

2. Transfer all of your Clooz database files and associated digital media files to your new computer. The default location for Clooz database is the *Clooz Data* folder in your Documents area.
3. Install the Clooz software on your new computer. You will need to know your Clooz license serial number (provided in an email when you first purchased it). If you have lost your serial number, you can obtain it at <https://support.clooz.com>. Clooz licensing allows you to use this same serial number on all of your own personal (or household) computer.
4. You should now be able to open your data files on the new computer. It is highly likely though that all of the digital media file links are broken. Use the *Media Location Tool* (on the Home tab, Tools screen) to reestablish the proper links.

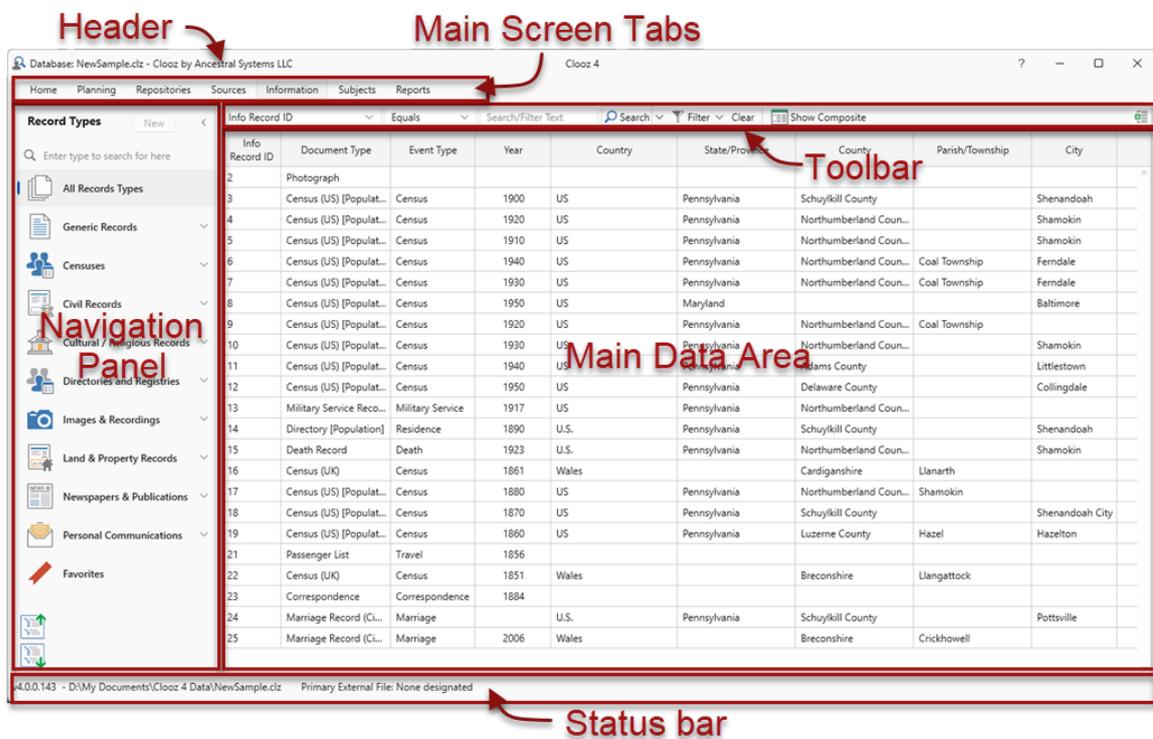


Media items can be reestablished in a single operation by specifying the highest level folder that contains all of the files. Be sure to set the *Media Location Tool* to *Include subfolders in searches* (see checkbox).

Chapter 3

Data Display and Manipulation

The main window of Clooz contains the display pages for viewing the different types of data records you have entered into Clooz. A convenient set of navigation and control tools is provided to manipulate your data. This is where you control what data will be displayed on the main grid, initiate the addition of new records or editing existing ones, or even delete records when necessary. There are tabs across the top to select the type of data you want to display. You can then control the specific record types to be displayed in the main data area using the Navigation Panel. The toolbar supports search and filtering operations as well as additional display options.



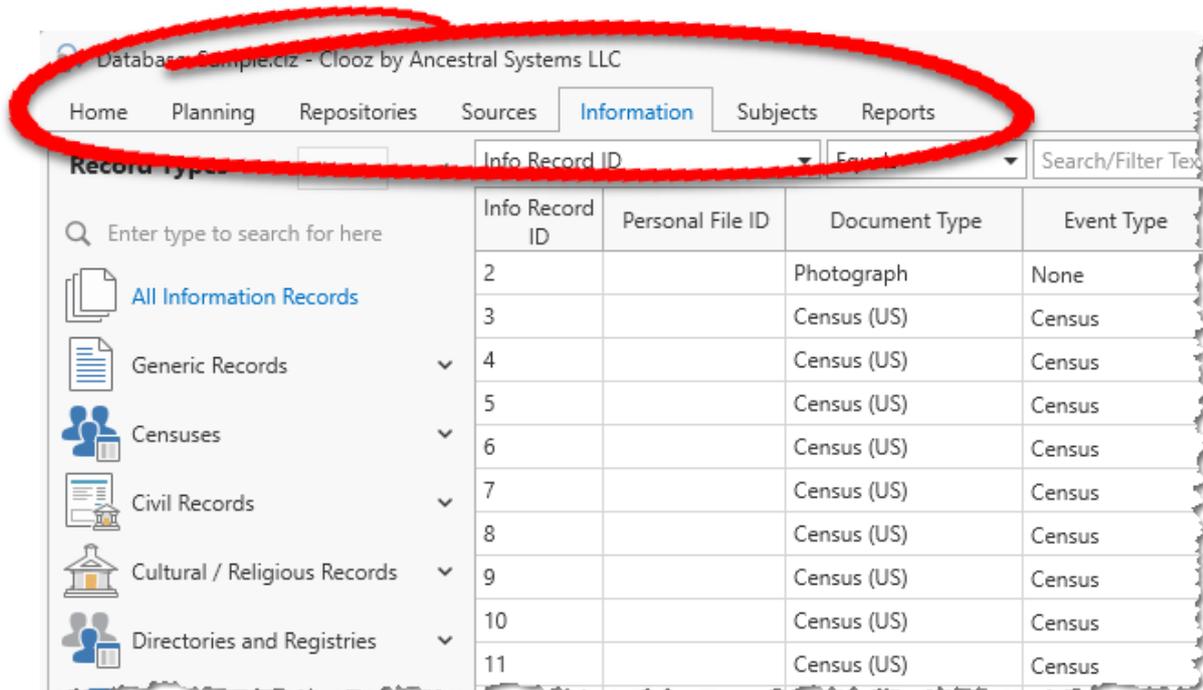
Window Header Components

The header area at the top of the window contains a number of useful items:

- The name of the database file currently in use (on left side)
- A breadcrumb list of editors currently open. This sequence is helpful when you open on type of record editor from within another.
- "?" on the right side will open the Clooz help website in your default browser

Main Screen Tabs

The tabs near the top of Clooz's main window allow you to select what type of data you want to see or work with. You can set which page you want to be displayed each time Clooz is started in the *Options* feature located on the *Home* page.



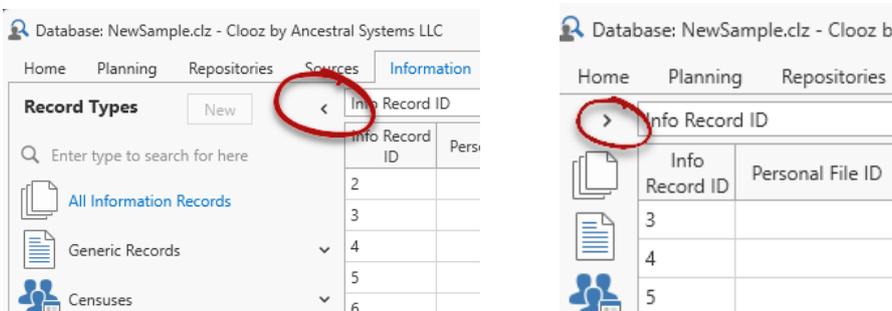
Home Page	The Home page is where you will find the various functions related to operating and configuring Clooz, such as opening and closing database files, backup and recovery tools, exchanging data with external files, setting program options, and other tools. New in Clooz 4 is a database overview screen visualizing the data content.
Research Planning Page	The Research Planning page is where you can create plans for your future research and monitor the status of your efforts. You can divide up your research into Projects, and within each Project define your Research Objectives. Each objective can then be broken down into specific activity Tasks.
Repositories Page	<p>These pages provide the functions to list and manage the respective type of records:</p> <ul style="list-style-type: none"> • List records based on Navigation Panel selection • Create new records • Edit, merge, clone or delete existing records • Export records
Sources Page	
Information Records Page	
Subjects Page	
Reports Page	The Reports page is where you can generate various reports from the data you have entered into Clooz.

Navigation Panel

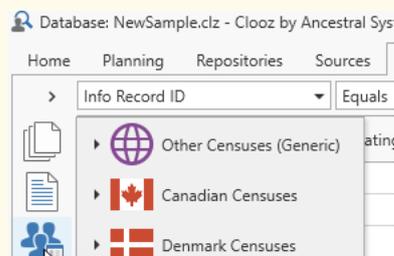
The Navigation Panel appears on the left side of Clooz's main window when the Planning, Repositories, Sources, Information, or Subjects tab page is selected. This panel together with the toolbar provides the complete set of navigation options for selecting exactly what data you will see in the main data area grid or Composite View.

A list of specific types of records related to the overall type selected in the tabs above makes up the content of this panel. Thus it varies depending upon which tabbed page is selected. Select an item in the Navigation Panel to have that type of record displayed in the main data area, or click the New button to start a new data record of the type selected.

The Navigation Panel is contractible (to a single column of icons) in order to conserve screen space allowing more actual data to be displayed. Click the arrow in the upper right corner of the Navigation Panel to contract or expand the panel.



When the panel is contracted, hover the cursor over an icon to display the items under that category in a popup window. Selections can be made from this list.



Main Data Area

The main data area in Clooz displays data in several formats:

- Grid format - Similar to a typical spreadsheet, and
- Composite View format - a hierarchical structure showing the connections between different record types.

The data contained in this display is determined by the current tab selection and selection of record type within the Navigation Panel. It can further be refined through sorting and grouping options, as well as searches and filtering using the toolbar functions. A number of additional functions are available through the context menu (right click), including editing, merging, and exporting items.

Toolbar

A toolbar sits just above the main data area, providing search and filter functions for the data shown as well as control of the main data area's display format.

Status Bar Components

The status bar at the bottom of the main window contains additional useful information:

- The software version number (left side)
- The full file path to the current database (left side)
- The file path to the external file currently designated as Primary (center left)
- Status messages which appear during certain program operations (center right)
- The name of the editor currently active (right side)

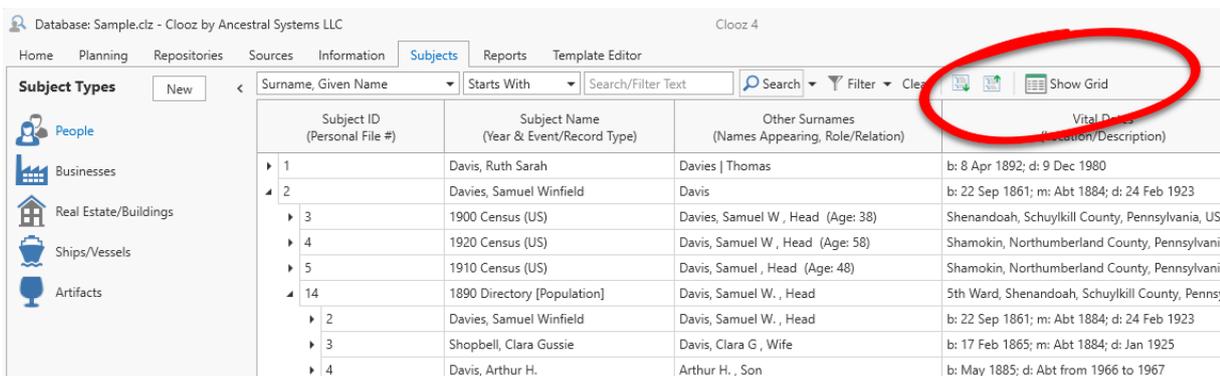
Display Formats

The main data area in Clooz displays data in two formats:

- Grid format - Similar to a typical spreadsheet, and
- Composite View format - a hierarchical structure showing the connections between different record types (between people and documents, between documents and sources, between sources and repositories, and more).

To change the current display format, click the toolbar command button to switch to the other type of display (Show Composite or Show Grid).

Grid Format



The screenshot shows the Clooz application interface with the 'Subjects' tab selected. The main area displays a grid of records. The 'Show Grid' button in the toolbar is circled in red. The grid has the following columns:

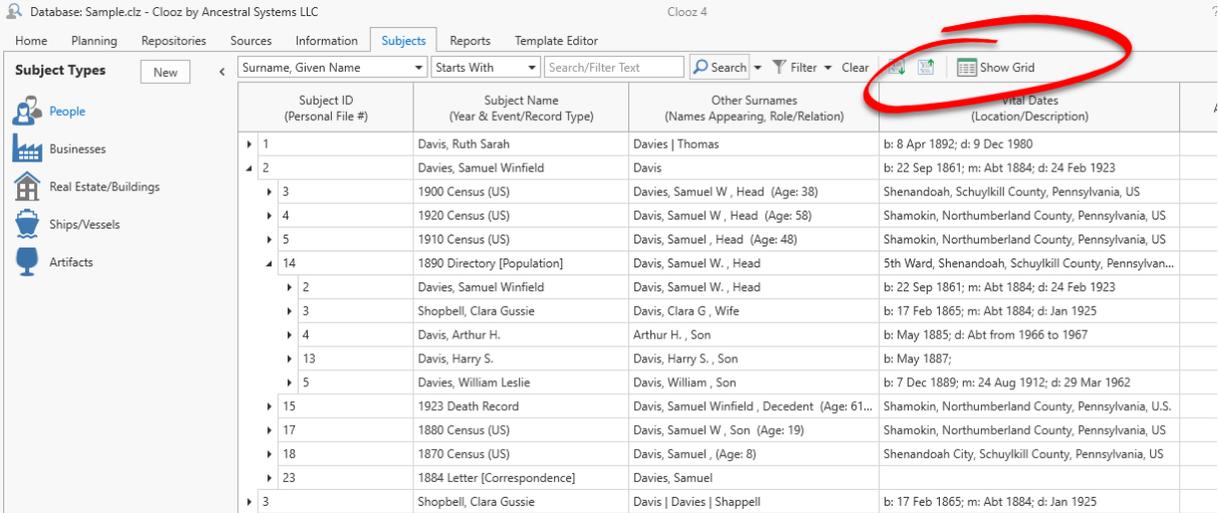
Subject ID (Personal File #)	Subject Name (Year & Event/Record Type)	Other Surnames (Names Appearing, Role/Relation)	Vital Dates (Location/Description)
1	Davis, Ruth Sarah	Davies Thomas	b: 8 Apr 1892; d: 9 Dec 1980
2	Davies, Samuel Winfield	Davis	b: 22 Sep 1861; m: Abt 1884; d: 24 Feb 1923
3	1900 Census (US)	Davies, Samuel W , Head (Age: 38)	Shenandoah, Schuylkill County, Pennsylvania, US
4	1920 Census (US)	Davis, Samuel W , Head (Age: 58)	Shamokin, Northumberland County, Pennsylvania, US
5	1910 Census (US)	Davis, Samuel , Head (Age: 48)	Shamokin, Northumberland County, Pennsylvania, US
14	1890 Directory [Population]	Davis, Samuel W. , Head	5th Ward, Shenandoah, Schuylkill County, Pennsylvania, US
2	Davies, Samuel Winfield	Davis, Samuel W. , Head	b: 22 Sep 1861; m: Abt 1884; d: 24 Feb 1923
3	Shopbell, Clara Gussie	Davis, Clara G , Wife	b: 17 Feb 1865; m: Abt 1884; d: Jan 1925
4	Davis, Arthur H.	Arthur H. , Son	b: May 1885; d: Abt from 1966 to 1967



The Grid format is most useful when you are interested in sorting records by vital event dates (birth, marriage, death) or locations. There are more columns of different data to work with.

Double-clicking a record in the grid will open the record in its editor.

Composite View



Subject ID (Personal File #)	Subject Name (Year & Event/Record Type)	Other Surnames (Names Appearing, Role/Relation)	Vital Dates (Location/Description)
▶ 1	Davis, Ruth Sarah	Davis Thomas	b: 8 Apr 1892; d: 9 Dec 1980
▶ 2	Davis, Samuel Winfield	Davis	b: 22 Sep 1861; m: Abt 1884; d: 24 Feb 1923
▶ 3	1900 Census (US)	Davis, Samuel W , Head (Age: 38)	Shenandoah, Schuylkill County, Pennsylvania, US
▶ 4	1920 Census (US)	Davis, Samuel W , Head (Age: 58)	Shamokin, Northumberland County, Pennsylvania, US
▶ 5	1910 Census (US)	Davis, Samuel , Head (Age: 48)	Shamokin, Northumberland County, Pennsylvania, US
▶ 14	1890 Directory [Population]	Davis, Samuel W. , Head	5th Ward, Shenandoah, Schuylkill County, Pennsylvan...
▶ 2	Davis, Samuel Winfield	Davis, Samuel W. , Head	b: 22 Sep 1861; m: Abt 1884; d: 24 Feb 1923
▶ 3	Shopbell, Clara Gussie	Davis, Clara G , Wife	b: 17 Feb 1865; m: Abt 1884; d: Jan 1925
▶ 4	Davis, Arthur H.	Arthur H. , Son	b: May 1885; d: Abt from 1966 to 1967
▶ 13	Davis, Harry S.	Davis, Harry S. , Son	b: May 1887;
▶ 5	Davis, William Leslie	Davis, William , Son	b: 7 Dec 1889; m: 24 Aug 1912; d: 29 Mar 1962
▶ 15	1923 Death Record	Davis, Samuel Winfield , Decedent (Age: 61...	Shamokin, Northumberland County, Pennsylvania, U.S.
▶ 17	1880 Census (US)	Davis, Samuel W , Son (Age: 19)	Shamokin, Northumberland County, Pennsylvania, US
▶ 18	1870 Census (US)	Davis, Samuel , (Age: 8)	Shenandoah City, Schuylkill County, Pennsylvania, US
▶ 23	1884 Letter [Correspondence]	Davis, Samuel	
▶ 3	Shopbell, Clara Gussie	Davis Davies Shappell	b: 17 Feb 1865; m: Abt 1884; d: Jan 1925

The Composite View has the advantage of mixing both Information and Subject records in a hierarchical format that displays broader information more rapidly than with the Grid. For instance, the Composite View will show you the documents you've found for a person and who all the other people are that were mentioned in these documents. For most of the shared columns (shared by Subject and Information records), data is combined to form summaries (such as combining all the vital event dates into one Vital Dates column).



Use the Composite View to examine what other people a person has been associated with in some way to identify other people you should research when expanding your family tree.

Double-clicking a record in the composite view will open (or close) a list of associated records below that item.

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

Top Level Data Type (the data tab selected at top of window)	Data Types Appearing in Expanded Lists
Subjects	Information Records, Research Objectives
Information Records	Subjects, Research Tasks
Sources	Information Records, Research Tasks ????
Repositories	Sources, Research Tasks
Research Projects	Research Objectives
Research Objectives	Research Tasks, targeted Subjects
Research Tasks	Information Records (search results)

When the Composite View is being displayed, two additional buttons appear on the toolbar to Expand or Collapse multiple records at once. The Expand Selected will expand any records you currently have selected on the view one level deeper. This acts somewhat like an Expand All function, but only for the records you select. Note that the more records you select for expansion, the longer it will take Clooz to retrieve all the underlying information.

Here is an example of some rows being selected and then the resulting display after the Expand Selected button was clicked.

Information Record ID	Personal File # (Names)	Year & Event/Record (Name Appearing, Role/Relation Age)
▶ 2		Photograph: Ruth (rt), age 23
▶ 3		1900 Census (US)
▶ 4		1920 Census (US)
▶ 5		1910 Census (US)
▶ 6		1940 Census (US)
▶ 7		1930 Census (US)
▶ 8		1950 Census (US)
▶ 9		1920 Census (US)
▶ 10		1930 Census (US)
▶ 11		1940 Census (US)
▶ 12		1950 Census (US)

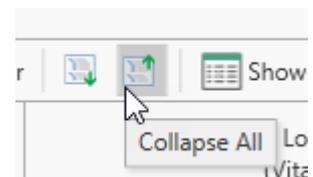
Information Record ID	Personal File # (Names)	Year & Event/Record Type (Name Appearing, Role/Relation Age)	
▶ 2		Photograph: Ruth (rt), age 23	
▶ 3		1900 Census (US)	Shenandoah, Sc
▶ 4		1920 Census (US)	Shamokin, Nort
▶ 2	Davies, Samuel Winfield	Davis, Samuel W , Head (Age: 58)	b: 22 Sep 1861;
▶ 3	Shopbell, Clara Gussie	Davis, Clara , Wife (Age: 53)	b: 17 Feb 1865;
▶ 8	Davis, Blanche R.	Davis, Blanche , Daughter (Age: 21)	b: Aug 1898;
▶ 9	Davis, Nellie C.	Davis, Nellie , Daughter (Age: 19)	b: 2 Jun 1900; n
▶ 6	Davis, Samuel W Jr.	Davis, Samuel W Jr , Son (Age: 17)	b: Abt from 190
▶ 7	Davis, Charles E.	Davis, Charles E. , Son (Age: 11)	b: Abt 1907; m:
▶ 33	Shappell, Daniel	Shappell, Daniel , Head (Age: 72)	b: Bet Jan 1847
▶ 34	Shappell, Jennings	Shappell, Jennings , Son (Age: 22)	b: Bet Jan 1897
▶ 5		1910 Census (US)	Shamokin, Nort
▶ 2	Davies, Samuel Winfield	Davis, Samuel , Head (Age: 48)	b: 22 Sep 1861;
▶ 3	Shopbell, Clara Gussie	Davis, Clara , Wife (Age: 44)	b: 17 Feb 1865;
▶ 5	Davies, William Leslie	Davis, William , Son (Age: 20)	b: 7 Dec 1889; r
▶ 1	Davis, Ruth Sarah	Davis, Ruth , Daughter (Age: 18)	b: 8 Apr 1892; c
▶ 8	Davis, Blanche R.	Davis, Blanche , Daughter (Age: 11)	b: Aug 1898;
▶ 9	Davis, Nellie C.	Davis, Nellie , Daughter (Age: 10)	b: 2 Jun 1900; n
▶ 6	Davis, Samuel W Jr.	Davis, Samuel Jr , Son (Age: 7)	b: Abt from 190
▶ 7	Davis, Charles E.	Davis, Charles , Son (Age: 2)	b: Abt 1907; m:
▶ 6		1940 Census (US)	Ferndale, Coal T
▶ 6	Davis, Samuel W Jr.	Davis, Samuel , Head (Age: 37)	b: Abt from 190
▶ 29	Lotovich, Stella	Davis, Stella , Wife (Age: 36)	b: Abt 1904; m:

You can further expand groups of records by selecting a mix of records that are at different levels, resulting in each expanding one more level.

Chapter 3

Info Record ID	Search/Filter Text	Search	Filter	Clear
Information Record ID	Personal File # (Names)	Year & Event/Record Type (Name Appearing, Role/Relation Age)		
▶ 2		Photograph: Ruth (rt), age 23		
▶ 3		1900 Census (US)	Shenai	
▲ 4		1920 Census (US)	Shamc	
▲ 2	Davies, Samuel Winfield	Davis, Samuel W , Head (Age: 58)	b: 22 S	
▶ 3	1900 Census (US)	Davies, Samuel W , Head (Age: 38)	Shenai	
▶ 4	1920 Census (US)	Davis, Samuel W , Head (Age: 58)	Shamc	
▶ 5	1910 Census (US)	Davis, Samuel , Head (Age: 48)	Shamc	
▶ 14	1890 Directory [Population]	Davis, Samuel W. , Head	5th W	
▶ 15	1923 Death Record	Davis, Samuel Winfield , Decedent (Age: 61yr 5m 2d)	Shamc	
▶ 17	1880 Census (US)	Davis, Samuel W , Son (Age: 19)	Shamc	
▶ 18	1870 Census (US)	Davis, Samuel , (Age: 8)	Shenai	
▶ 23	1884 Letter [Correspondence]	Davies, Samuel		
▲ 3	Shopbell, Clara Gussie	Davis, Clara , Wife (Age: 53)	b: 17 F	
▶ 3	1900 Census (US)	Davies, Clara G , Wife (Age: 35)	Shenai	
▶ 4	1920 Census (US)	Davis, Clara , Wife (Age: 53)	Shamc	
▶ 5	1910 Census (US)	Davis, Clara , Wife (Age: 44)	Shamc	
▶ 14	1890 Directory [Population]	Davis, Clara G , Wife	5th W	
▶ 15	1923 Death Record	Davis, Mrs Samuel , Informant	Shamc	
▶ 28 (SL-10)	1840 Slave Status Record [Ge...]	Shappell, Mrs Clara Gussie , Slave (Age: 22)	Shamc	
▲ 8	Davis, Blanche R.	Davis, Blanche , Daughter (Age: 21)	b: Aug	
▶ 3	1900 Census (US)	Davies, Blanche , Daughter (Age: 1)	Shenai	
▶ 4	1920 Census (US)	Davis, Blanche , Daughter (Age: 21)	Shamc	
▶ 5	1910 Census (US)	Davis, Blanche , Daughter (Age: 11)	Shamc	

The Collapse All button will close all of the currently expanded records.



Both the grid and Composite View have context menus (right click any record) providing a number of possible actions. Keyboard shortcuts are available for most of the actions.

- Edit the selected item using the editor designed for that record type (data in the grid and Composite View cells cannot be edited directly),
- Perform Bulk Edits to apply a given value to the Alternate ID of all the selected records,
- Delete all selected records,
- Merge two or more records,
- Clone a record (used to split an existing record into two separate ones),
- Export the selected record to other genealogy programs or Excel,
- Generate Reports,
- Show or hide the search / filter toolbar,
- Show the Group By area (Grid only),
- Choose which columns to include in the display, and
- Apply a best fit across all visible columns.

Edit Item	Ctrl+E
Bulk Edit Item(s)...	Ctrl+B
Delete Item(s)	Delete
Export Item to Genealogy Programs	Ctrl+X
Generate Report	Ctrl+R
Export All Items to Excel	Ctrl+A
Export Selected Item(s) to Excel	Ctrl+S
Merge Item(s)	Ctrl+M
Clone (to Split Subject Persona)	Ctrl+C
Hide Search Toolbar	
Show Group By Panel	
Choose Columns to display	Ctrl+L
Apply Best Fit - All columns	Ctrl+F

Navigating the Displays

To control which data is displayed in the main data area:

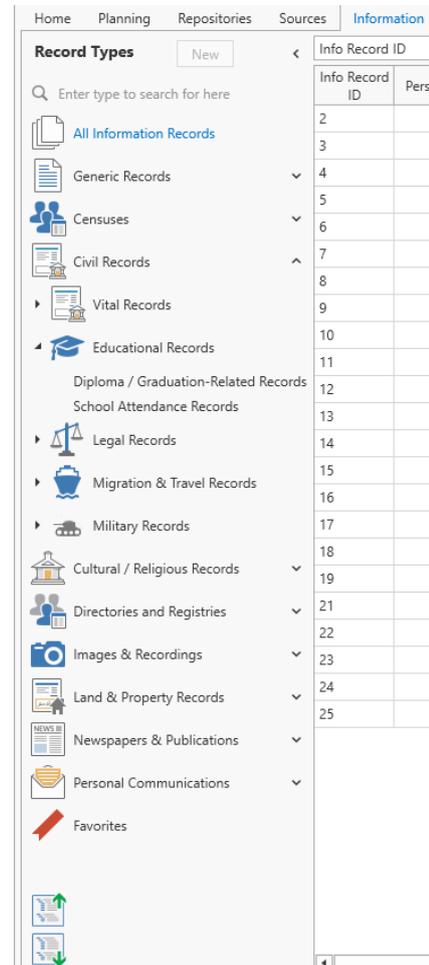
1. Select one of the tabs at the top of the main window, then
2. Click on the desired record type in the Navigation Panel appearing on the left side of the window.

Subject records can be one of several different types (a person, business, real estate/building, ship or artifact). Click People to display the list of those Subject records in the main data area.

In the case of Information Records, each record type corresponds to an editing template specifically designed to present an appropriate set of data fields for a given type of document or other information source. Thus there are many more different record types than the other data types. There are several extra features for Information Records to make it easier to locate the record type you are looking for.

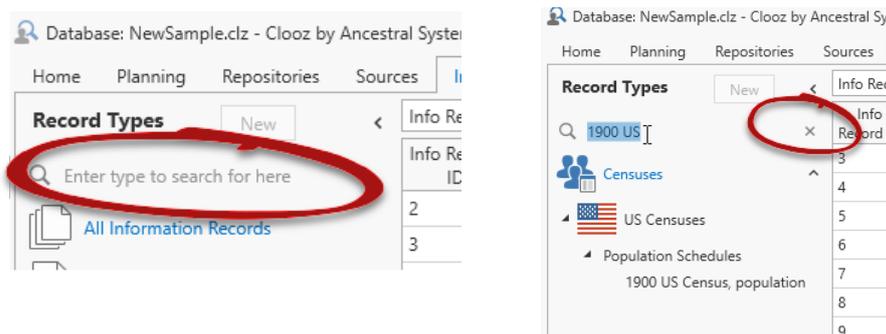
The Information Record types are shown in a hierarchical (tree) type layout, grouped into Categories. Each contains the corresponding record types, or in some cases, additional sub-category groupings. Expand the contents of a category by clicking its down arrow, and collapse an expanded list by clicking its up arrow. At the bottom of the Navigation Panel are two icons, which Expand all the categories or Collapse all the categories.

Like all of the other tabs, clicking an Information record results in those records being displayed in the main data area. However, when a category is selected,

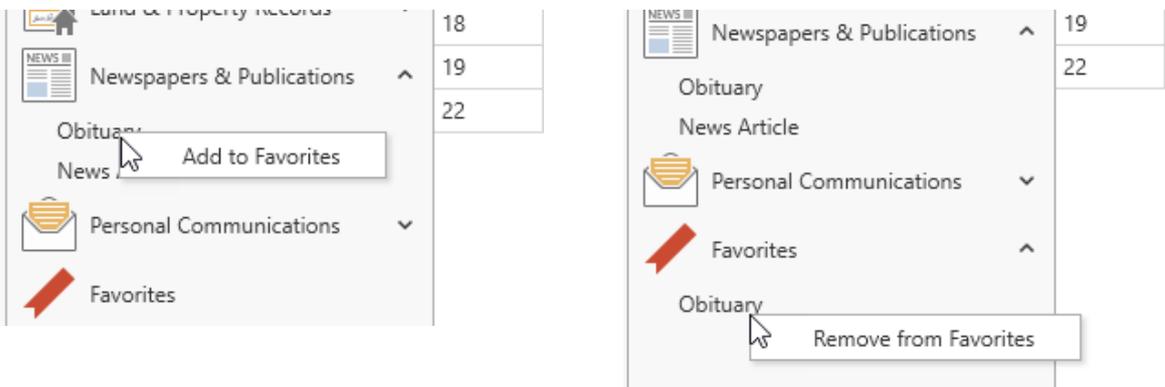


Information records matching any of the record types under that category are displayed in the main data area. To see all Information records, select All Information Records.

The Navigation Panel has a search capability for Information record types. Start typing the name of the record type and the list is filtered down to any matching templates. To turn off the filtering, click on the small x to the right of the search box.



Information record types have a user-controlled Favorites category, where you can designate record types you frequently use and would like to have quick access to. Right click a template to Add it as a Favorite, or to Remove a Favorite.



 The Favorites feature only works with individual record types. Categories cannot be designated as a Favorite.

Sorting Records

Individual columns (or a combination of multiple columns) in the grid and Composite View displays can be sorted in ascending or descending order by clicking on the column header.

Left click on a column header to toggle the sorting between ascending (shows an up arrow in header), descending (shows a down arrow in header), and no sorting (no arrow).

You can designate a more complex sorting by sorting the first column, then hold down the shift key while click one or more additional secondary columns. Numbers will be displayed beside the arrows in the column header

The screenshot shows a software interface with a data grid. At the top, there are tabs for 'Information', 'Subjects', and 'Reports'. Below the tabs are search filters: 'Given Name', 'Starts With', and 'Search/Filter Text'. The data grid has columns: 'Alternate ID', 'Surname', 'Given Name(s)', and 'Other Si'. The 'Surname' header has an upward arrow with a '1' next to it. The 'Given Name(s)' header has an upward arrow with a '2' next to it. A red annotation 'Hold down shift key to add secondary sort columns' is overlaid on the grid.

Alternate ID	▲ 1 Surname	▲ 2 Given Name(s)	Other Si
	Brosisis	Terressa	
	Davies	Clayton, H	
	Davies	Curtis	
	Davies	Edward	Davis
	Davies	Edward	
	Davies	Edward C.	

signifying the order in which the columns will be sorted. Secondary sorts only matter when there are equal values for records in the preceding sort.

Right-clicking on a column header pops up a menu from which the same sorting can be done (or cleared).

Columns are sorted with an appropriate sorting scheme. Text fields are sorted alphabetically, and numeric fields numerically. In the case of free-form date fields, an attempt is made to extract the year and month. Columns where a mix of data has been combined (as in some of the Composite View columns), are sorted as text.

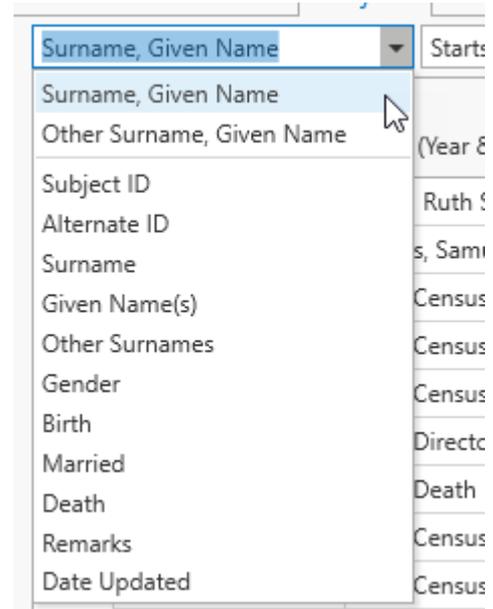
Searching and Filtering Records

The main function of the toolbar is to support searching and filtering of records in the data type being displayed. This applies to both the grid and Composite View display formats. Defining the parameters for a search or filter are basically identical, although the resulting display is different.



Simple Matching (single set of criteria)

The Column(s) field is where you select the display column (or in some cases, columns) to be searched or filtered. A drop down list of all the available columns in the current display is available to select from. Only columns currently set to display (as opposed to those that are hidden) will appear in the list.

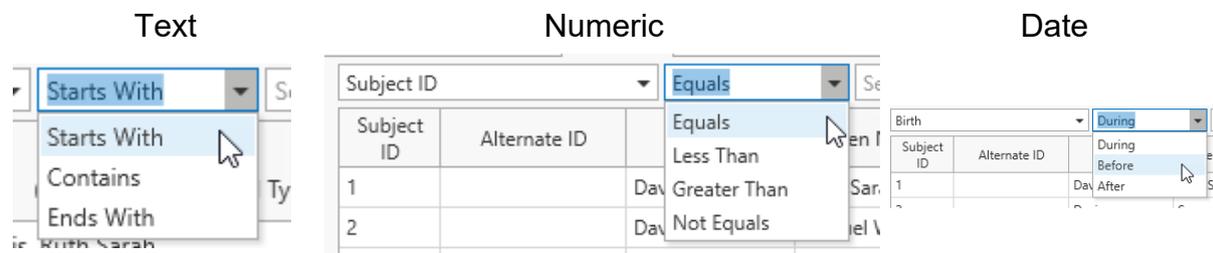


There is a special case with people Subjects, shown above the separator line in the list. When you select one of these items with multiple columns (as in Surname, Given Name), the text entered as criteria must be in that format. If you do not enter a comma, the search will revert back to a single column 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 “Shop, C” as the criteria, you will find the first row with a person whose surname begins with “Shop” and a given name that begins with “C”.

Chapter 3

Subject ID	Alternate ID	Surname	Given Name(s)	Other Surnames	Gender	Birth	
1		Davis	Ruth Sarah	Davies Thomas	F	8 Apr 1892	
2		Davies	Samuel Winfield	Davis	M	22 Sep 1861	Abt 1:
3		Shopbell	Clara Gussie	Davis Davies	F	17 Feb 1865	Abt 1:
4		Davis	Arthur H.	Davies	M	May 1885	
5		Davies	William Leslie	Davis	M	7 Dec 1889	24 Au
6		Davis	Samuel W		M	Abt from 1902 to 1903	Abt 1:

The condition field is next, and determines how the search or filter criteria will be applied. This too has a drop down list of choices, which depend upon the data type of the column(s) selected.



Finally, you must enter in the criteria to be applied. Clicking Enter at this point will apply execute the search or filtering, whichever has the light box around the button. Set the default toolbar action to match your preference in the program *Options*. Otherwise, you can just click on the desired button, or use a keyboard shortcut (Ctrl+S to search, Ctrl+F to Filter).



Do not enter wildcard characters (*, ?) into the criteria unless they are part of the text you are trying to match. The Condition field provides these wildcard functions automatically.

Clooz will then display the results. If there are no matches to the criteria you entered, a message will pop up stating this.

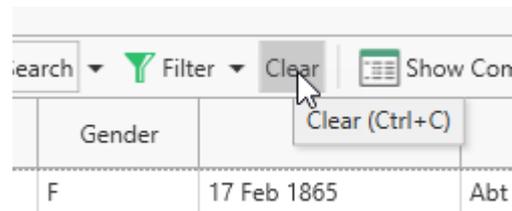


If this was a search, the matching rows will be highlighted, and Clooz will move to the first matching row.

If a filter operation, Clooz will only display records that match the criteria. In addition, a filter icon will appear in the status bar to indicate filtering is currently in effect and only a subset of the data is being displayed.



Click the *Clear* button to clear a currently active search or filter.



When search results are displayed that have multiple record matches, you can advance to the next matching row by clicking the Search button again. Shift-click the Search button to go back to the previous matching item.

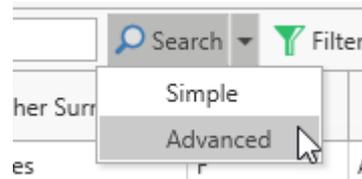


When searching for names in the Other Surnames column, it is best to use Contains as the condition, since the field could contain multiple names. Using Starts With in that case would only evaluate the first or possibly several names for that person.

Advanced Matching (multiple sets of criteria)

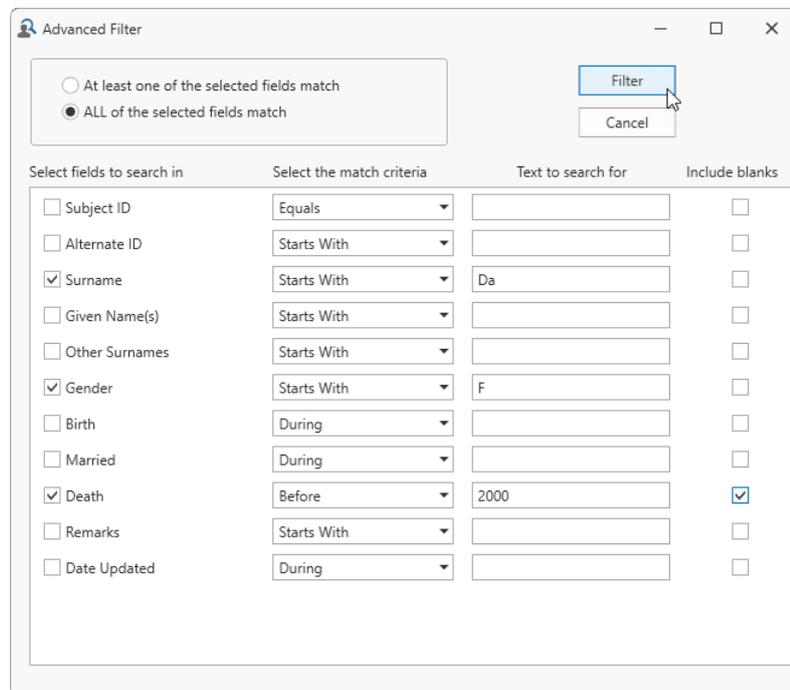
In the preceding section, the process for performing single criteria (simple) searches and filtering was covered. What if you want to combine several sets of criteria to use in the search. Clooz provides an *Advanced Search* and *Advanced Filter* capability for this purpose.

Click the down arrow to the right of the *Search* or *Filter* button. A menu will appear to choose from. *Simple* is the process we previously described. Select *Advanced*.



A dialog window will display for you to define the match criteria.

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 toolbar button you selected for the advanced action.



The "Include blanks" column is how you can indicate whether records that have blank values for the field should be considered a match or not.

Resulting display:

Subject ID	Alternate ID	Surname	Given Name(s)	Other Surnames	Gender	Birth	Married	Death
1		Davis	Ruth Sarah	Davies Thomas	F	8 Apr 1892		9 Dec 1980
8		Davis	Blanche R.	Davies	F	Aug 1898		
9		Davis	Nellie C.	Stepp	F	2 Jun 1900	Abt 1926	11 Apr 1932
20		Davies	Sarah	Davis	F	25 Sep 1850	18 Feb 1871	
21		Davies	Sarah E.		F	1879		
27		Davies	Grace		F	Sep 1892		
32		Davies	Susannah		F	7 Oct 1863		

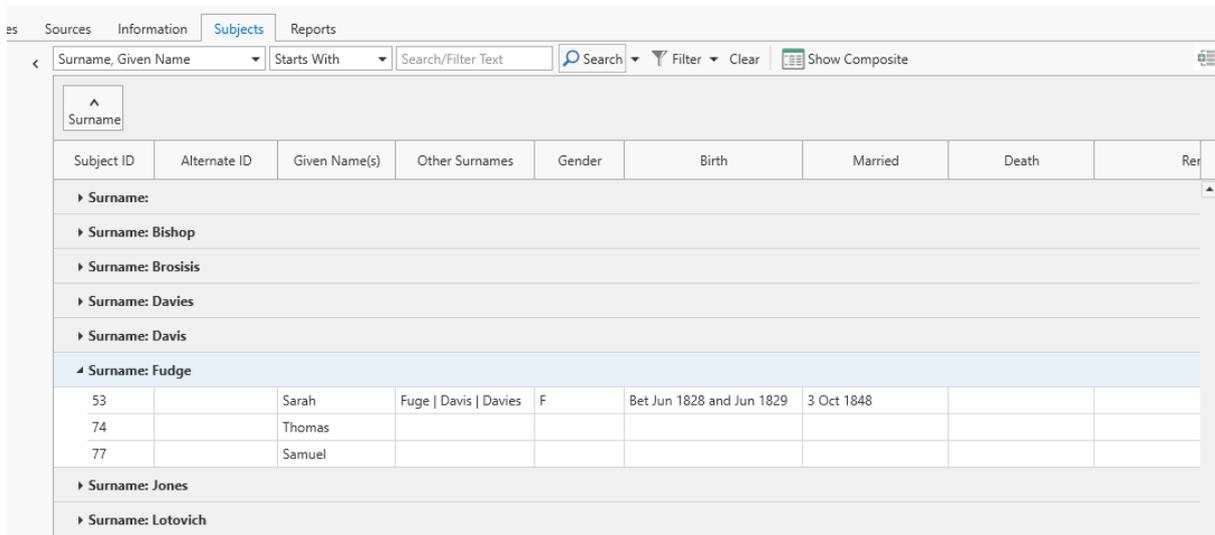
Grouping Records

When the grid format is displayed, a grouping feature is available to group records based on them having the same values in the field(s) you designate. To use this feature the Grouping box needs to be displayed first. Display the Grouping box by clicking on the button on the far right side of the toolbar, or right-click the grid and select Show or Hide Group By Panel (either method will toggle the Group By Panel on / off).

The screenshot shows a software interface with a data grid. The toolbar at the top includes a 'Show Composite' button. A 'Grouping Panel' is overlaid on the grid, with a red arrow pointing to a button in the top right toolbar. A right-click context menu is open over the grid, with a red arrow pointing to the 'Hide Group By Panel' option. The text 'Toggle Grouping Panel On/Off' is written in red across the menu.

Subject ID	Alternate ID	Surname	Given Name(s)	Other Surnames	Gender	Birth	Married	Death
35		Brosisis	Terressa			Apr 1875		
37						Bet Apr 1926 and Ap...		
38						Bet Apr 1931 and Ap...		
39						Bet Apr 1933 and Ap...		
40						Bet Apr 1881 and Ap...		
41						Bet Apr 1919 and Ap...		
42						Bet Apr 1875 and Ap...		
43						Bet Apr 1916 and Ap...		
44						Bet Apr 1946 and Ap...		
45						Bet Apr 1925 and Ap...		
46						Bet Jan 1890 and Jan...		
47						Bet May 1918 and Ju...		
48						Bet Apr 1919 and Ap...		
49						Bet Apr 1921 and Ap...		

The Group by a particular column, drag the header into the Grouping Panel. You can group by more than one column, but is probably only useful if you have a lot of record with the same values in the secondary columns.



Customizing Display Formats

Clooz allows you to customize the columns of the grids and Composite Views for the various data types according to your personal needs and preferences. You can control which columns appear, the order they appear in, and the width of each column.

Adjusting Column Widths

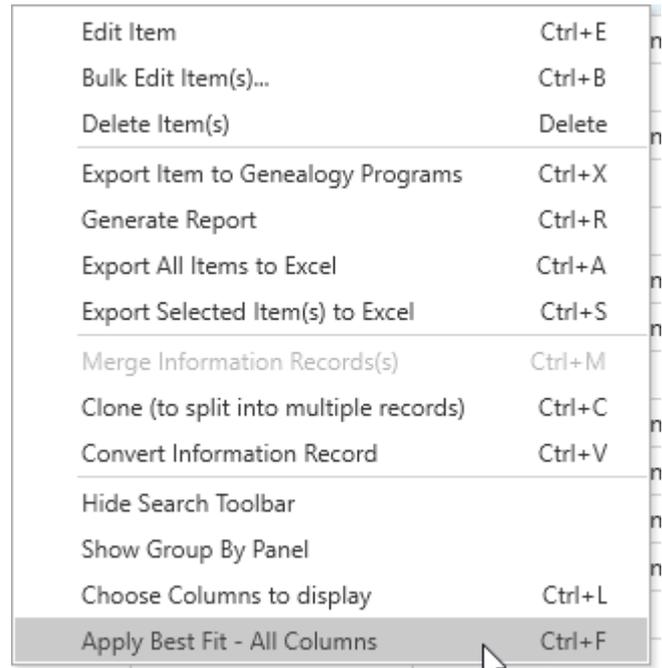
There are two ways to adjust the width of the columns:

1. Manually, on an individual basis. Position the cursor over the border line appearing between the



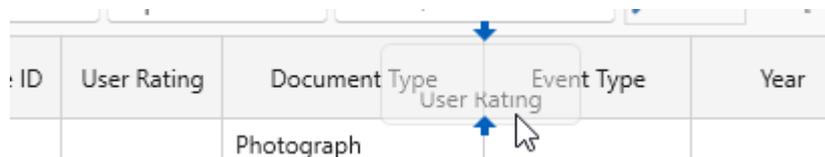
headers of two columns. When the left-right cursor appears, click and drag left or right to change the column widths.

2. Have Clooz automatically find the best fit based on content widths (found in the Context Menu by right clicking or type Ctrl-F).



Changing Column Order

You can change the position order of each column by

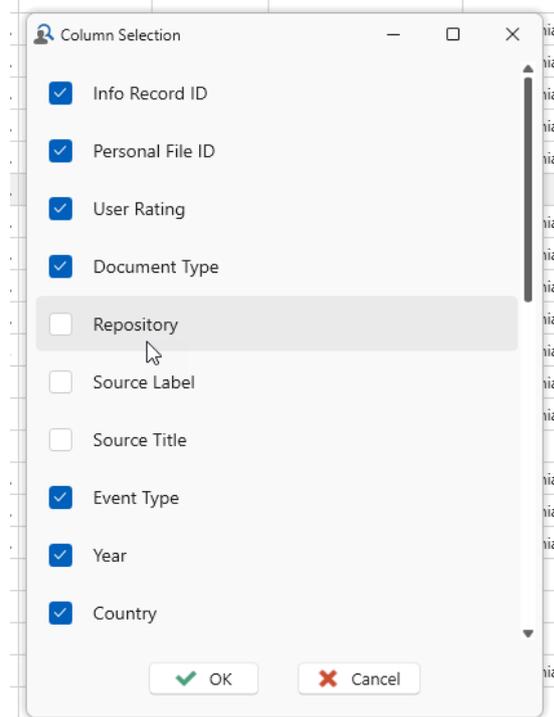
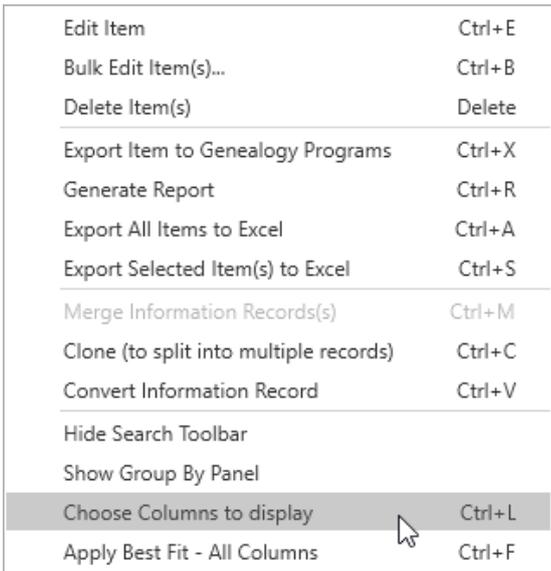


clicking and grabbing a header and dragging it to a new position. As you drag the faint image of the selected column, arrows will appear indicating where it would be positioned when you release the mouse button.

You can also remove a column by dragging it off the top of the grid. However, if you do that, it can only be restored using the *Choose Columns to display* feature.

Choosing Columns to Display

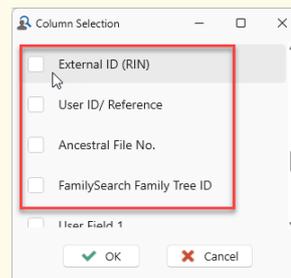
Click on the Choose Columns to display item in the display's Context Menu (right-click) to add or remove columns from the display. A dialog window will appear where you can set the check boxes for those columns you want to be visible.



When a column is added it is initially positioned on the far right side of the grid. You will need to slide it to your desired position after exiting the Column Selection dialog.



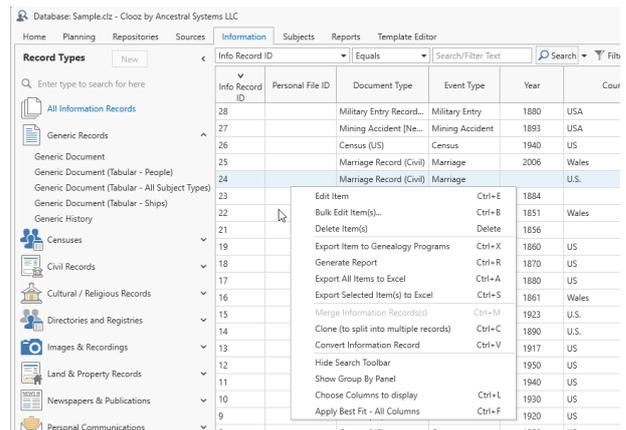
When choosing columns for the Subject page, remember the identifier columns from external files will not appear unless a Primary external file has been designated in the *Home: External File Links*.



Chapter 4

Managing Data Records

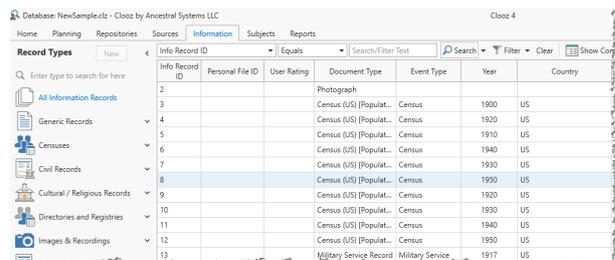
To manage records in Clooz, click the tab for the desired data type on the main screen. Right click on a record to choose from various Subject edit functions in the context menu, or select a specific template in the Navigation Panel to create new records.



Adding New Records

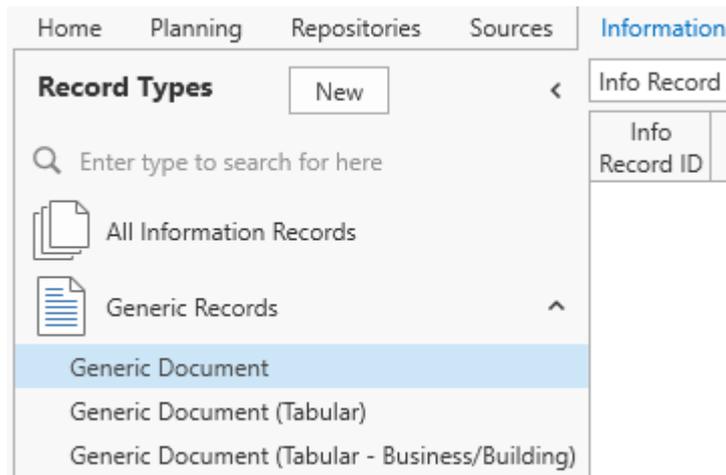
To create a new record:

1. Display the main page for the type of data you want to add (selected by the tabs at the top of the main window).



2. In the Navigation Panel on the left side of the window, find the template you want to use.

3. Either double-click the desired template type, or click the New button when the desired template is already selected.



4. The editor will then be displayed to edit the data for the new record.

Editing Existing Records

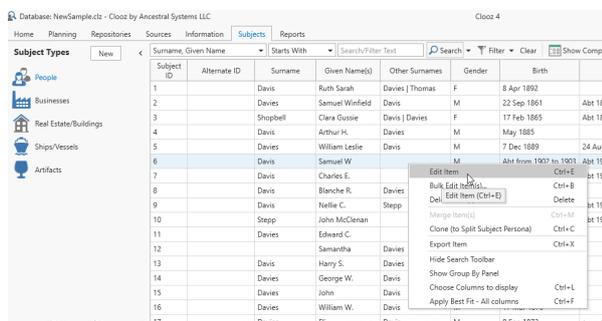
To edit an existing record:

1. On the appropriate page of the main screen, locate the record you want to edit.

2. Do one of the following to activate the editor with this record:

- Double-click the row containing the record (grid display only),
- Select the record and press Ctrl+E, or
- Select the record and right-click, selecting *Edit Item*.

3. The editor will now appear with the data from this record.

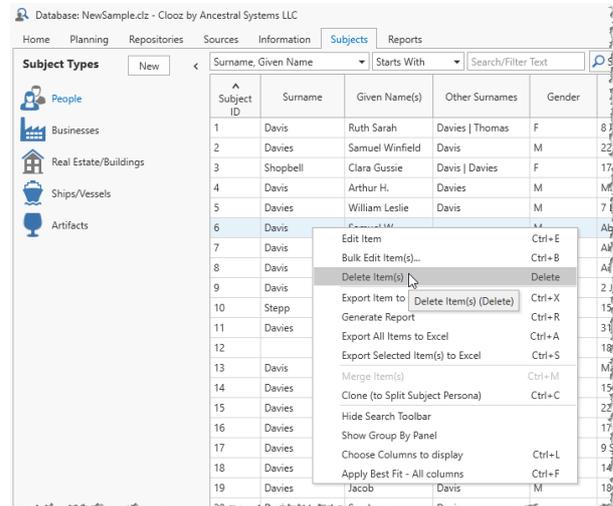


Double-clicking items in the Composite View expands the sub-items. Right-click and use the Context Menu there or short-cut.

Deleting Records

To delete one or more records:

1. On the appropriate page of the main screen, select the record(s) you want to edit. (multiple records can be selected using by hold down the Ctrl key while clicking additional rows, or the Shift key while clicking the last row of a span of rows)
2. Do one of the following to delete the records:
 - Select the record and press the *Delete* key, or
 - Right-click the highlight area and select *Delete Item(s)*.
3. The display will refresh after deleting the records.



Merging Records

Two or more records of the same data type (Repositories, Sources, Information, Subjects) and template type can be merged. All of the data from each will be combined, as well as any links to other records. If there are different values for the same field you will be requested to pick one.

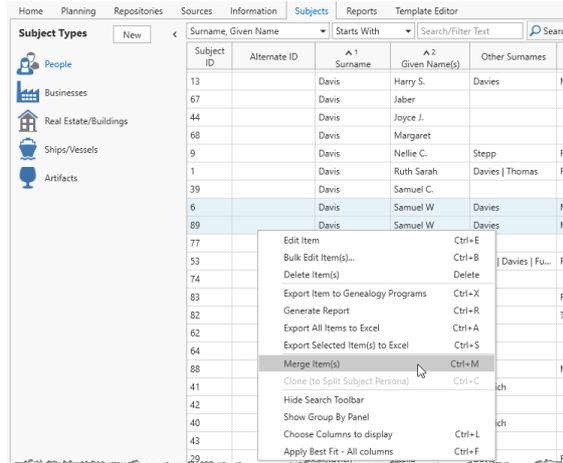
To merge records:

Chapter 4

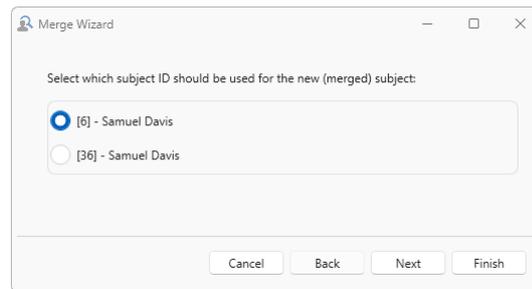
1. On the appropriate page of the main screen, select the records you want to merge (after clicking the initial row, Ctrl+Click the additional rows). At least two rows must be highlighted.

2. Do one of the following to merge the records:

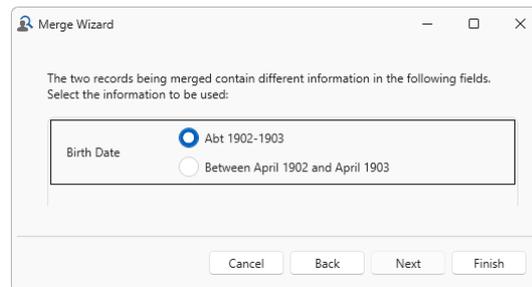
- Select the record and press the Ctrl+M key, or
- Right-click the highlight area and select *Merge*.



3. Select the record ID (of the selected records) to use for the newly merged data.



4. Resolve any conflicts that Clooz identifies (where the two records have different values for the same field).



5. The newly merged data is presented in the editor for review.

The screenshot displays the 'Subject Editor' for Samuel Davis in the Clooz software. The main form contains fields for Subject ID (6), Alternate ID, Prefix, Given Name (Samuel), Surname (Davis), Suffix, Nickname, Alias, Married Surnames, Other Surnames, Sex (M), Living?, Birth - Date (Abt 1902-1903), Location (Pennsylvania), Marriage - Date(s) (Abt 1924), Location, Death - Date (Abt 1954-1960), Location, and Remarks.

Below the form is a table of events with columns: Events, Family, Generic Records, Censuses, Civil Records, Cultural/Religious, Directories/Registers, Images/Recordings, Land/Property, News/Articles, Personal Comms, External Links, and Research Objectives. The table lists several events including Birth, Residence, Occupation, and Census records for Samuel W Jr Davis and Samuel Jr Davis.

On the right, the 'Details' panel shows 'Event / Parameters' for 'Birth' with 'Data Values' for Date (Between January 1902 and Janua...), Location (Pennsylvania), Place Detail, Description, Remarks, Rationale, Informant, Evidence Assess..., Confidence Ratin... (☆☆☆☆), and Participants/De... (1) Samuel Davis (Principal).

At the bottom, there are buttons for 'Print', 'Report', 'Save and Start New Subject', 'Save Subject', and 'Cancel'. The status bar at the very bottom indicates '***BETA v4.0.0.125*** - D:\My Documents\Clooz Beta Data\NewSample.clz Primary External File: None designated Editing: Subject'.

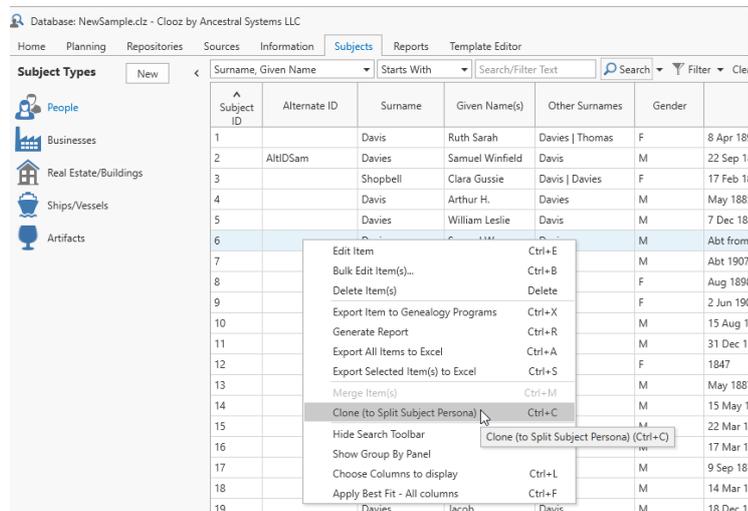
Cloning (Duplicating) Records

You can clone (duplicate) Information and Subject records when you need to split the original record into two, or in the case of Source records, simply start a new record using the contents of an existing one as a template.

Chapter 4

To clone an Information or Subject record:

1. On the appropriate page of the main screen, select the record you want to clone. Only one row can be highlighted.
2. Do one of the following to clone the record:

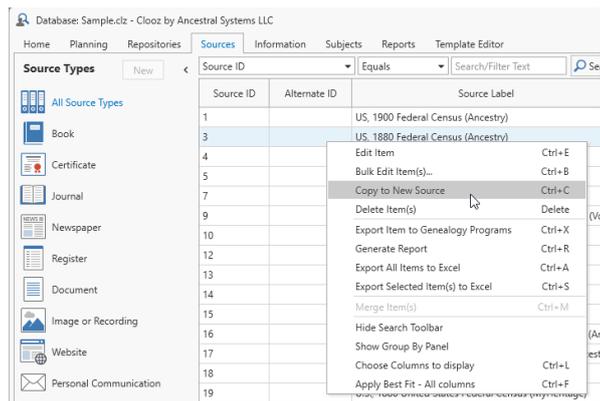


- Select the record and press the Ctrl+C key, or
- Right-click the highlight area and select *Clone*.

3. The new record will appear at the bottom of the list. Edit both the old and new records to make adjustments as required.

To create a new Source based on an existing one:

1. On the Source page, select the Source you want to copy. Only one Source can be highlighted.
2. Do one of the following to copy the Source:



- Select the record and press the Ctrl+C key, or
- Right-click the highlight area and select *Copy to New Source*.

3. The new Source record will appear in the Source editor. Make any further data modifications.



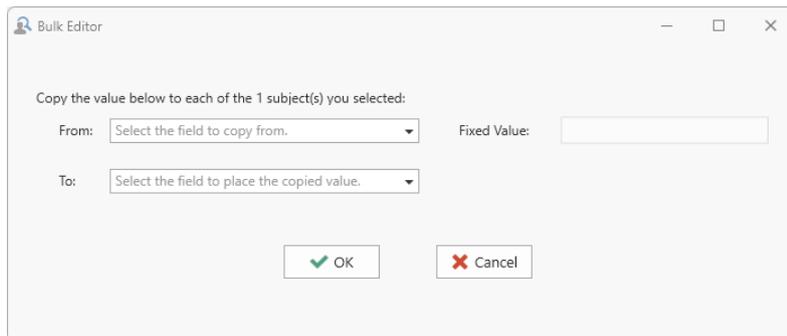
Cloning Subject records and then deleting links to certain Information Records is a way of recovering from the situation where you had a Subject record for a person who was really two or more different people. This operation in effect splits the initial Subject into multiple Subjects which you can then properly trim down to their respective correct identities by deleting the Information Records that do not apply to that identity.

Bulk Edits

Bulk edits is a special feature for making the same change to multiple records (those currently selected) in a single operation. It only applies the Source, Information, and Subject pages.

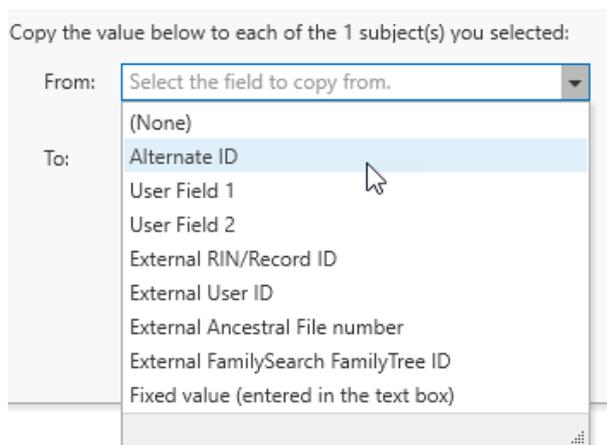
First select all the records to be affected from the main screen, and then right-click to view the Context Menu. Select *Bulk-Edit Items* to display the Bulk Edit dialog to the particular data type you are working with.

The bulk edit feature for Subject records can be used to set the values in one of the 3 user definable fields (Alternate ID, User Field 1, and User Field 2) to either the same fixed



value for all records (as entered into the text box), or to values from other ID type fields in each record, including the various IDs from records linked to an external file which is currently designated as Primary in the external files list.

Select the desired source field (or use of fixed value) using the 'From' drop down list, and the destination field using the 'To' drop down list.



Use the Choose Columns context menu item on the main screen to turn on display of fields you want to view.

Here are the fields available to edit using this feature:

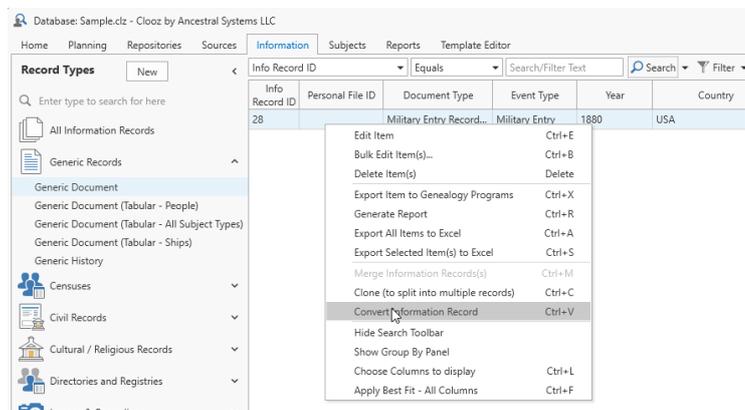
Main Data Page Type	Editable Fields
Source	Repository
Information Record	Personal File ID Source
Subject	Alternate ID User Field 1 User Field 2

Converting Information Record Types

You can change the type of template used in an Information Record. Perhaps you have decided a different template would have been a better choice, or when migrating to version 4, new template types became available.

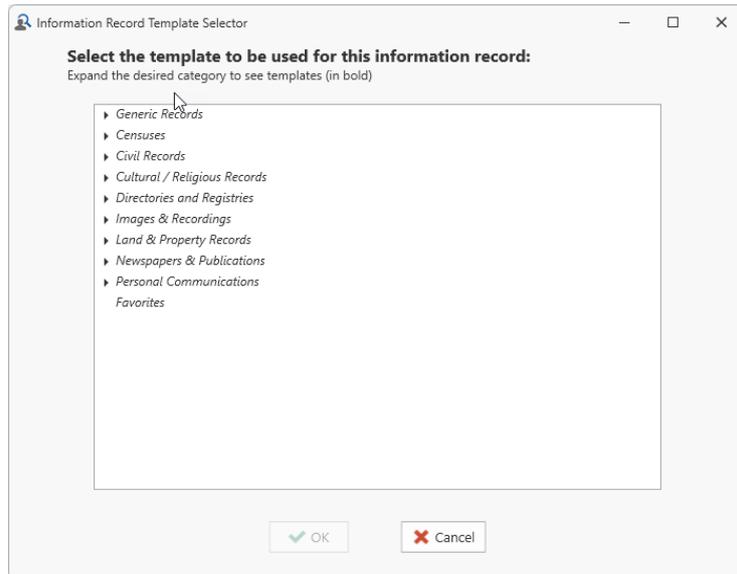
To convert an Information Record:

1. On the Information page, select the record you want to convert. Only one can be selected.
2. Do one of the following to convert the record:



- Select the record and press the Ctrl+V key, or
- Right-click the highlight area and select *Convert Information Record*.

3. Select the template to be used in the converted record.

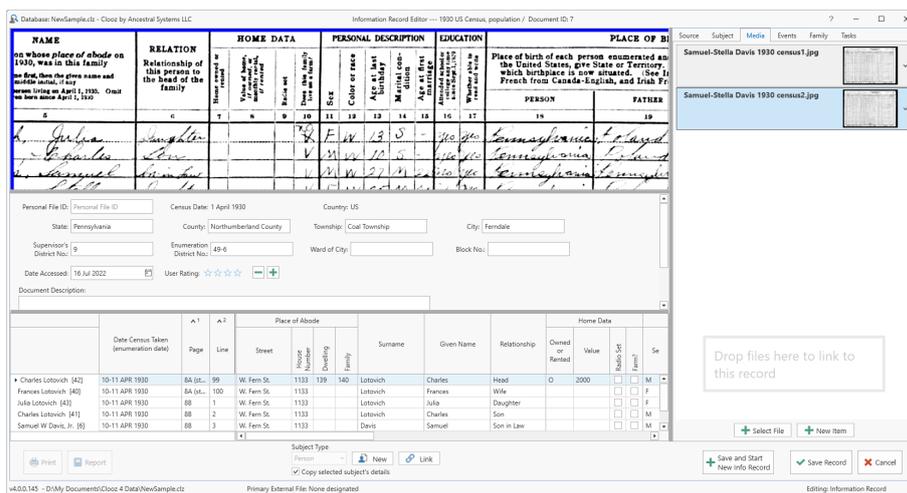


4. The converted record will appear in the Information Record editor. Clooz will attempt to map the fields from the original template to that of the new one. When the field types match the data will be placed in the field. Data content for fields in the original template that do not have matching counterparts in the new one will be list in the Remarks box of the Subject's details.

Chapter 5

Clooz Editing Tools

Each of the major data types in Clooz has a specifically designed editor. These editors all adhere to the same general layout for a consistent look and feel. They are designed to provide you access to related data outside the record being edited without exiting the editor, keeping a broad set of information at your fingertips as you edit. You can also display Clooz's new built-in media viewer to more easily transcribe your data.



Clooz editors use a template-based approach. The Information Record editor supports over 200 different templates (80 of which are new in Clooz 4). There are templates for each of the 5 Subject types, and 9 Source types. The completely new Research Planning tool in Clooz 4 has editors for its component record types (Projects, Objectives, Tasks). These editors are all covered in detail in their own help topics.

In Clooz 4, an internal media viewer has been added to assist in data transcription or extraction from digital images of a source document. This tool can display digital

file content of various types, either within the Clooz program window, or in a separate external window. The content can be manipulated in a number of ways to make data transcription easier (panning, zooming, brightness & contrast adjustments, rotation, and features to display column and row headers within the image). All of this is described in its own help topic: [Using the Media Viewer](#).

Editing Text Fields

Clooz editors use text field editing controls when you enter or edit text in a variety of fields. The behavior of these edit controls changes when appropriate for the type of data being entered:

Basic Text Fields

The basic text edit control behaves the same as most standard Windows text edit fields:

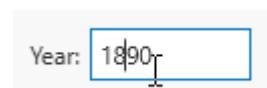
1. To activate the edit mode, either click inside the edit box or tab (or shift-tab for reverse) into it from an adjacent field.



2. When first activated, any existing text will be highlighted for replacement. If you were to immediately start typing, the new text would replace the highlighted text.



3. To edit the existing text, position the cursor (should appear as the edit cursor) at the desired character position for where you want to start inserting characters. You can use the *Home* key to move to the beginning, or *End* key to move to the end.



4. When the desired text is displayed, click in another field you want to edit (or press tab / Shift-tab key to move to the next / previous field).

In some many cases, hover the cursor over the field's label to see any pop-up hints that Clooz has for that field.

This basic form of the text edit control is used when the field values are more likely to differ from the same field in other records. User defined ID fields, age, dwelling numbers, etc. are examples of these types of fields. Name fields in Information Records use this type of field since you are meant to be recording names as entered into the Source document (misspellings or name spelling variations included).

Most times the basic text edit control is meant to be a single line (as seen above). However in some cases it is expanded into a text block to allow the entry of multiple lines of text (such as for descriptions, comments, and remarks). The multi-line text blocks operate the same as the single line controls, except *Enter* can be pressed to move to the next line of text.

A screenshot of a multi-line text block control. The control has a title "Document Description" and a text area containing the text "This is an example of multi-line text blocks." The text area is a rectangular box with a thin border and a light gray background.

Constrained Text Choices

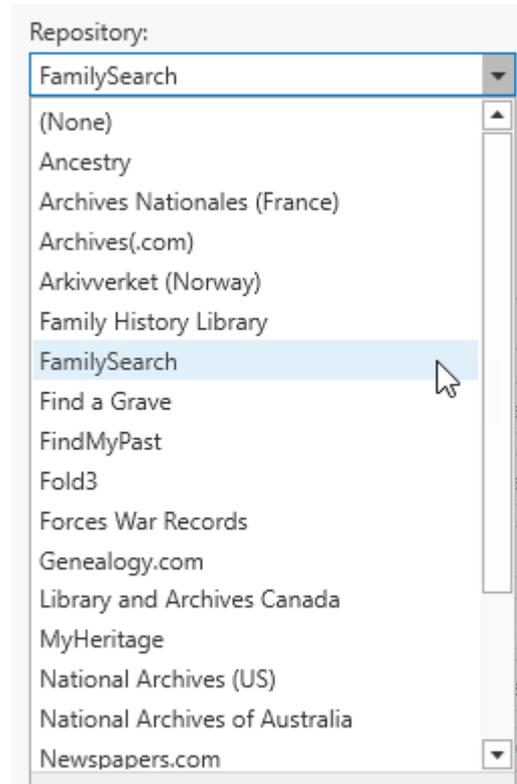
Some edit controls only allow you to select a value from the drop-down list.

A screenshot of a drop-down list control. The control has a label "Repository:" and a text area containing the text "FamilySearch". The text area is a rectangular box with a thin border and a light gray background, and it has a small downward-pointing arrow on the right side.

When such a control is not the active control of focus, it will show a down arrow on the right side.

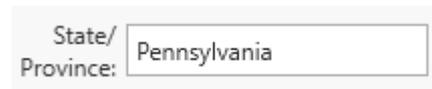
Click on the control to open the drop-down list (or press ALT+DOWN ARROW or F4). Then select the desired value. You can use the Up or Down keys to select another value (then press Enter), or simply click the desired value.

When exiting such a control, whatever value is showing in the box is the one that will be retained. If a different value is highlighted in the drop-down list, but not selected (Enter or click) prior to exiting the control, the value is not changed.



Auto-Fill Text Fields

Data fields where values will likely be used multiple times (such as country, state, and county names) will display a drop-down list to choose from and also suggest automatically completed text as you type. When the edit mode is not active, these control appear like the basic text controls.



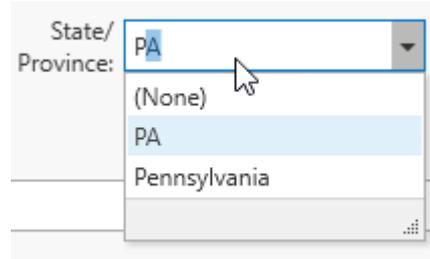
When the edit mode for the control is activated, a down-arrow will appear on the right side. The entire text is initially selected for replacement. Set the cursor to a specific character position to modify the value, otherwise whatever you enter will replace the highlighted text.



To open the list, press ALT+DOWN ARROW or F4, or click on the dropdown button.

In addition, as you enter text characters into the field the first matching value from the list beginning with the same characters will be used to auto-complete the rest of the field.

The suggested additional text is highlighted such that if you continue typing, it will be replaced with an updated matching suggestion.



Before exiting the edit control (either by clicking another control or pressing the tab key), ensure the text appears in the box the way you want it. Selections from the list must be complete by clicking them or pressing the *Enter* key in order to make the change the field's value.



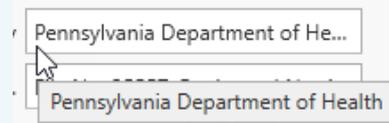
There will be times when you have typed in the text you want but Clooz is extending it with a suggested text (i.e., you do not want the suggested text). Assuming the cursor is after the last character you typed and the suggested text is highlighted, simply press the Delete key to erase the suggested part. Then exit the box.



The content of the drop-down list is an accumulation of all the entries you have made into that type of data field (country, state, religion, surname, street name, etc.). If you need to change all of the occurrences of a particular value, use the [List editor](#) in the [Home tab, Tools](#).



Any text field where the text is wider than the available space will show an ellipsis at the end of the otherwise visible text. Hover the cursor over the control to have Clooz display the entire text value in a pop-up window.



Editing Rating Fields

Clooz provides a rating control for displaying a rating or priority value in graphic form. Both positive and negative values are supported. Positive values are indicated by star images, and negative values as a red X.

User Rating	Document Type
★	Death Record
XX	Census (UK)
★★★★	Correspondence

The rating control is used in the following fields:

Record Type	Field
Information Record, Source, Research Project, Objective, Task	User Rating
Research Project, Objective, Task	Priority
Information Record Events and Families, Participants	Confidence Rating

The maximum number of stars and X's Clooz will display is 4. The default starting value is none, displaying no stars or X's.

These rating fields can be sorted, searched, and filtered on the main screen data pages using a numerical value ranging from -4 to 4, where -4 is 4 X's, 0 is no stars or X's, and 4 is 4 stars.

Info Record ID	Personal File ID	User Rating	Document Type	Event Type	Yes
15		★	Death Record	Death	192
16		XX	Census (UK)	Census	186
23		★★★★	Correspondence	Correspondence	186



In all cases, the definition of each rating level is left to the user since there are numerous ways users might want to use these fields.

Selecting Rating Values

To preview a new selection, hover the cursor over the stars or X's.

To designate a rating value using the rating control, do one of the following:

- Click on the star or X representing the level you want to select. You can only directly select a rating value of 1-4 items (stars or X's), whichever is showing at the time. Otherwise edit using the increase and decrease buttons.
- Activate the edit mode of the rating control edit mode by pressing the tab (or Shift-tab) from an adjacent control. When activated by keyboard navigation, a focus box will appear around each star in sequence. When this box is visible, use the left and right arrow keys to change the rating level value.
- Click on the plus or minus button to increase or decrease the rating level.



Use the increase or decrease buttons to return the rating level to 0 (no stars or X's), or to transition to stars from X's or from X's back to stars. If one star is selected and you press the decrease button, the rating value returns to 0 (no stars or X's). Continuing to decrease will switch the display to X's. To return to star icon's, click the increase button until the desired value is obtained.

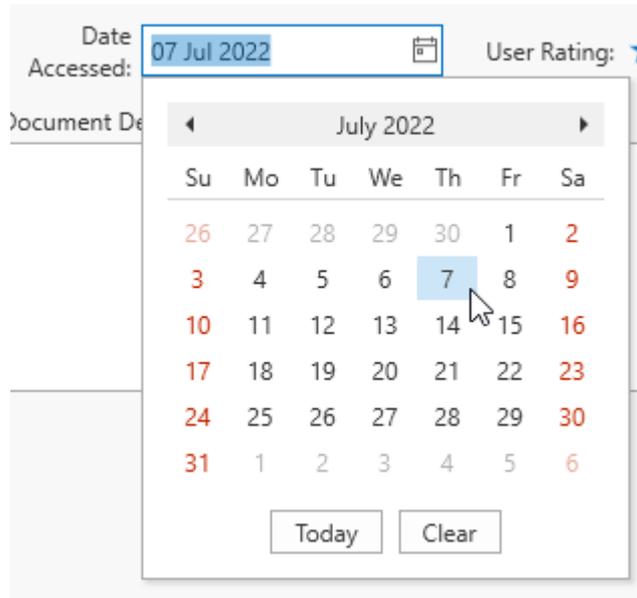
Editing Calendar Date Fields

A few fields require the entry of specific calendar dates, such as the Date Accessed



field. The edit control in this case shows a small calendar icon on the right side.

Click the calendar icon to drop down a date selection control, select the desired month and year and then click on a day in that month.



You can change the date selection without opening the dropdown calendar. Position the caret at the portion of a date value that needs to be changed. To increment the value, press the UP ARROW. To decrement the value, press the DOWN ARROW. Or use the mouse wheel.



Calendar dates must be entered as a full date. Ranges or partial dates (month or year only) are not supported at this time.

Chapter 6

Working with Digital Media Files

Clooz supports linking digital media files to the following types of records:

- Repositories
- Sources
- Information Records



To associate a digital media file with a Subject record, create an Information Record of the appropriate type (Photograph, Audio, Video, etc) and link the Subjects associated with the file to that record.



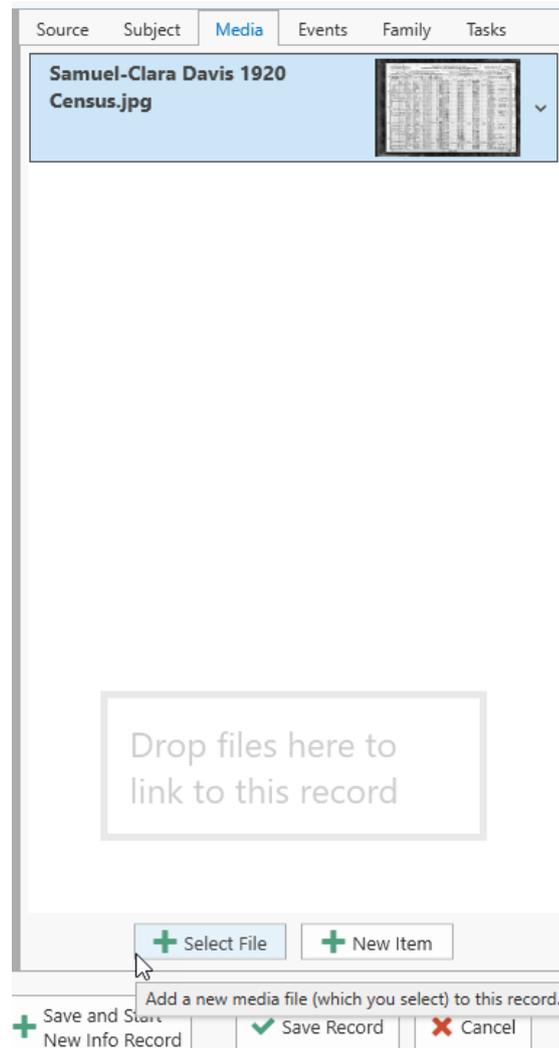
Clooz only saves the file location when linking a media file. The file itself is left external to the Clooz database.

Linking a media file to a Clooz record

To link a media file, select the Media tab in the editor's right side panel and do one of the following:

- Drag and drop a file from the Windows file explorer onto the Media Panel in Clooz,
- Click on the Select File button and then select a file from the file selection dialog window that pops up,
- Click the New Item button to add an unspecified media item, then open the new media item and enter in the file location.

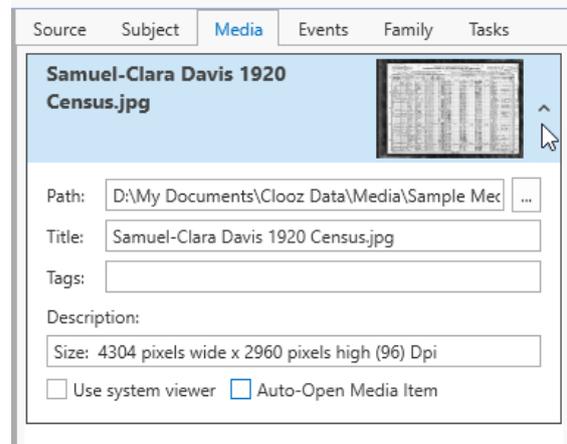
Be sure to save the record you are linking the file to when closing it.



Editing the Media Item Details

After linking media files to a Clooz record, you can enter more detailed information about them in the media item appearing on the media panel.

Click on the down arrow on the right side of the media item header (to the right of the thumbnail image). A box of detail fields will drop down for you to edit.



When media files are linked Clooz will automatically add details it finds in the Windows properties of that file.

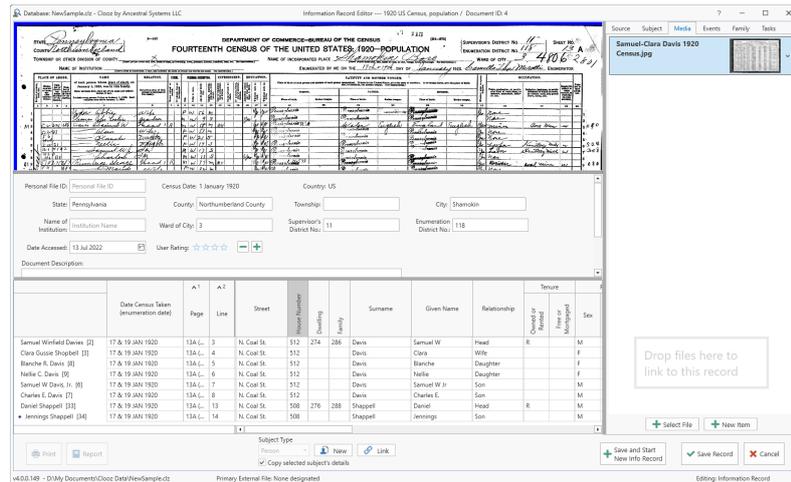
Viewing Attached Media Files

Clooz provides you the option to view the contents of the attached media file in either Clooz's own media viewer, or in the viewer setup on your computer system as the Windows default. The Windows default viewer will be used if the Use system viewer box is checked on in the media item's details, or if you set your Clooz program options to not use the Clooz viewer.

The various media viewers in Clooz are all only for display (i.e., read-only). You cannot modify the original file, or save as a new file.

Chapter 6

Clooz's media viewer feature can display digital media files either inside the Clooz program window, or as a floating external window.



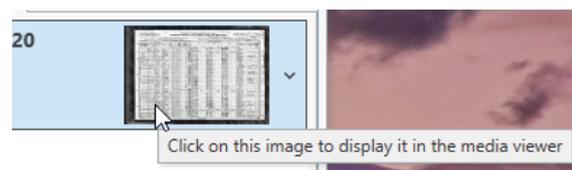
There are 4 different viewer formats, supporting the commonly used file formats:

Viewer Type	File Types
<u>Image Viewer</u>	.bmp, .jpg, .jpeg, .gif, .png, .tif, .tiff, .wmf
<u>Pdf File Viewer</u>	.pdf
<u>Text Viewer</u>	.txt, .doc, .docx, .rtf
<u>Spreadsheet Viewer</u>	.xls, .xlsx

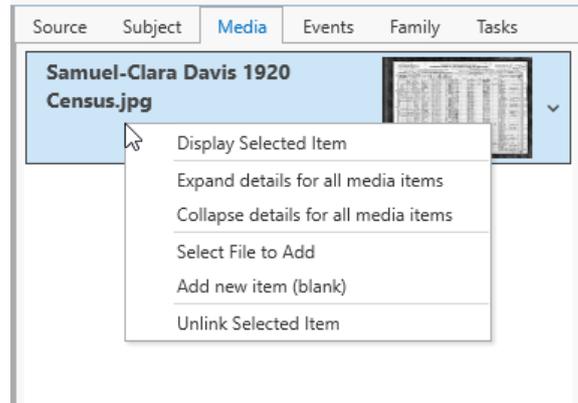
Files of types other than those listed will automatically use the default viewer current set in Windows.

Display a file in the designated viewer (Clooz viewer or Windows default viewer) by doing one of the following:

- Click on the thumbnail image,



- Right-click the desired media item in the media panel and select *Display Selected Item*,



-

Open a media item in the media panel and check the box labeled *Auto-Open Media Item*. It will then appear automatically the next time the record is opened.

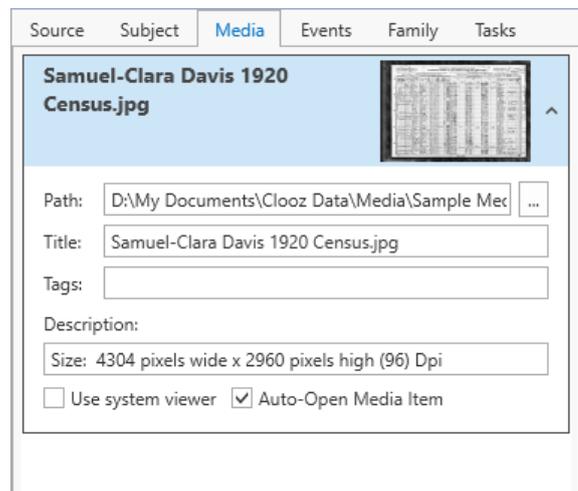


Image Viewer

The Clooz Image Viewer has been designed to support transcription of data from digital images.



This includes features such as:

- Row and Column header overlays allowing panning of the main content while keeping the headers visible and aligned

- Row guide to keep your place in the image while transcribing
- Image adjustment features to improve the readability of the image (brightness, contrast, rotation)
- Magnifier box
- Zooming and panning
- Docked or Floating Window

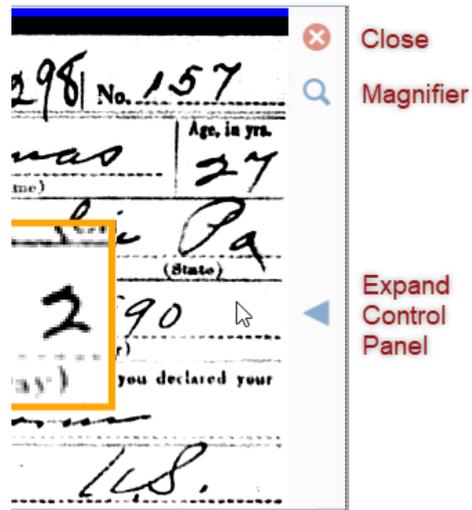
For instructions on linking digital media files to Clooz records and displaying them in media viewers such as this one, see [Working with Digital Media Files](#).

The Image Viewer Control Panel

Most of the Image Viewer features are controlled by a control panel which appears whenever the cursor is over the viewer window.

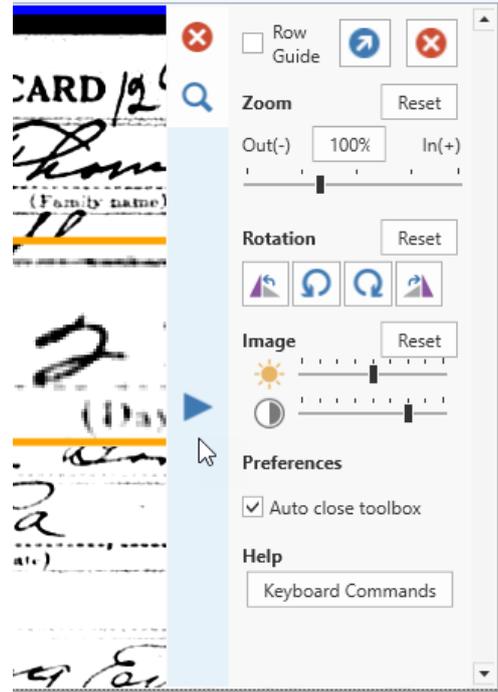
The Control Panel immediately provides access to several buttons:

- Close Button (closes the viewer)
- Magnifier Button (toggles magnifier box on/off)
- Expand Button (click the arrow to fully expand the Control Panel)



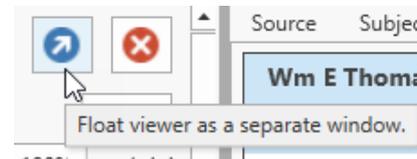
When fully expanded, the Control Panel shows the full set of controls.

To close the Control Panel, click the right arrow, or if the Auto close toolbox checkbox is checked, the Control Panel will retract automatically when the cursor is no longer over the Control Panel, and disappear completely when the cursor is no longer over the viewer.



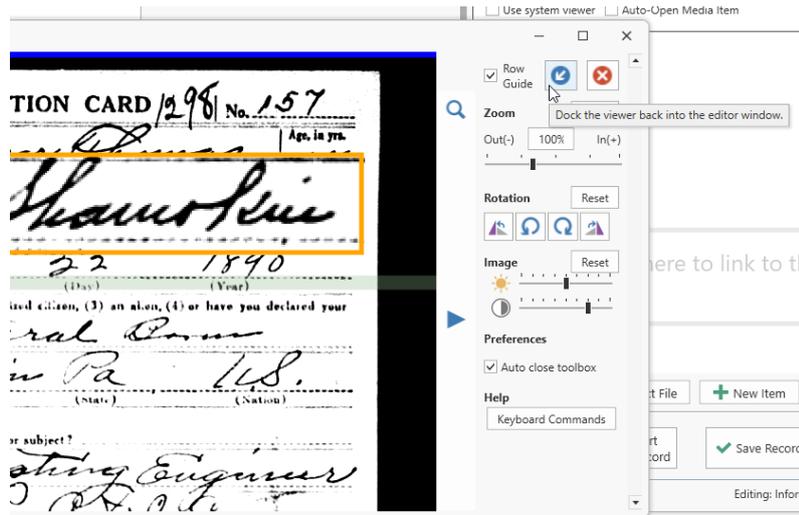
Floating and Docking the Viewer to and from an External Window

If you have more than one monitor you might want to display images in a separate window on the other monitor to allow more room the rest of the Clooz window. To do this, click on the float button in the Control Panel or Press Ctrl+F.



To return a floating viewer to inside the Clooz window, click on the dock button in the Control Panel (or press Ctrl+F).

These buttons appear in the same location within the Control Panel. Which one will appear depends upon whether the viewer is currently floating or docked.



 Use the keyboard command: Ctrl+F to jump back and forth between floating and embedded viewer positioning. The viewer needs to have current program focus (was last thing clicked) for keyboard commands to work with it.

Panning The Image

To move up/down/left/right in a displayed image, do one of the following:

Panning Action	Mouse	Keyboard
Pan Up/Down	Use Mouse Wheel	Ctrl+Up/Down Arrow
Pan Left/Right	Shift+Mouse Wheel	Ctrl+Left/Right Arrow
Pan any direction	Click and drag	
Recenter on a desired point	Double-click the point	

Zooming the entire image

There are several ways to zoom the entire image. First ensure the viewer has program focus by clicking in it once if you have been working in other areas of the Clooz window. Then do one of the following:

Type of Zoom	Mouse	Keyboard
Zoom in/out at cursor location	Ctrl+Mouse Wheel (continuous) or Shift+Left Click (zoom in, discrete steps) Shift+Right Click (zoom out)	
Zoom in/out based on image center	Control Panel zoom slider	NumPad Plus / Minus
Zoom to a rectangle	Shift+Left Click - Drag to draw rectangle	
Best fill the viewer / Default level	Control Panel Reset button	Ctrl+NumPad 0
Zoom 100% of original image size	Control Panel 100% button	Ctrl+NumPad 1

Clooz does have limits on how far you can zoom in or zoom out. When you hit the limit, the zooming ceases to show further changes.

Using the Magnifier

The Image Viewer supports a magnifier function for enlarging just a portion of the image. To display (or hide) the magnifier box, do one of the following:

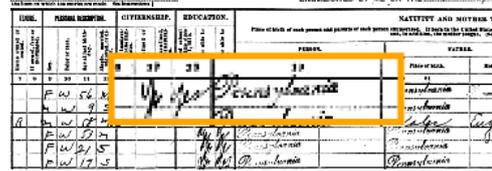
- Move the cursor over the image to display the control buttons on the right, then click the



magnifier button,

- Click anywhere inside the image viewer to ensure it is the active control, then press Ctrl+M.

The magnifier box should now be appearing in the center of the image viewer. You can now control its size, location and magnification:



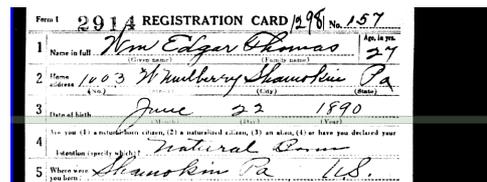
Action	Mouse	Keyboard
Move box	Click and drag magnifier (cursor inside box)	
Increase/decrease size of magnifier box	Use mouse wheel while cursor if over magnifier	Ctrl+Shift+NumPad Plus/Minus
Reshape magnifier box	Drag any of the sides or corners	
Increase/decrease magnification	Hold down Ctrl key while using mouse wheel while cursor if over magnifier	Ctrl+NumPad Plus/Minus
Close magnifier	Double-click magnifier	Ctrl+M



The magnifier is dependent on the resolution of the underlying image to support significant enlargement. If the magnified area is not of sufficient quality, try enlarging the entire image since this regenerates the image from the original file contents.

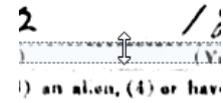
Displaying the Row Guide

The Row Guide is a faint horizontal bar which you can drag up and down over the image, serving as a placeholder as you transcribe the information.



Check the Row Guide box in the Control Panel to display the Row Guide, or press Ctrl+Alt+Spacebar when the image has focus (you might need to click inside the image to shift program focus to the Image Viewer).

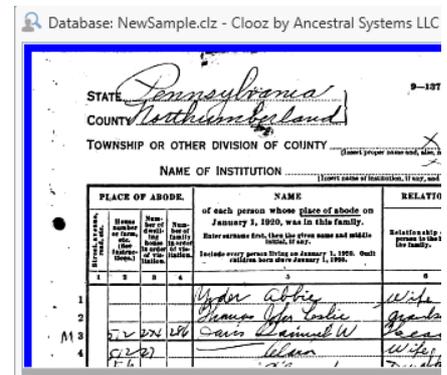
When you position the cursor over this bar it will show as up/down arrows, click and drag the bar to the desired position.



The guide bar can also be moved by keyboard actions: Ctrl+Alt+Up/Down Arrows.

Using the Row and Column Header Overlays

You probably have noticed the blue bars at the top and left side of the Image Viewer. The bars can be dragged to open up overlay displays that you can use to display the headers for columns and perhaps the name column as row headers. Of course this is only useful for images of tabular documents, such as census forms, which have rows and columns. Once these header overlays are setup they will remain in position as you pan around within the details of the document being displayed, much like the fixed rows and columns feature in most spreadsheet software. The column headers will move left and right only as you scroll through the image. The row headers will only move up and down to remain aligned with the rows showing in the image. Whatever part of the image you are looking at the column and row headers will still be visible.

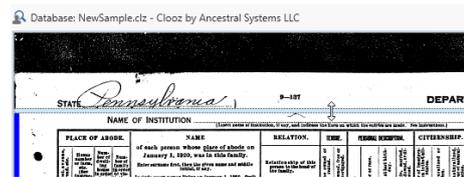


Here are the steps involved:

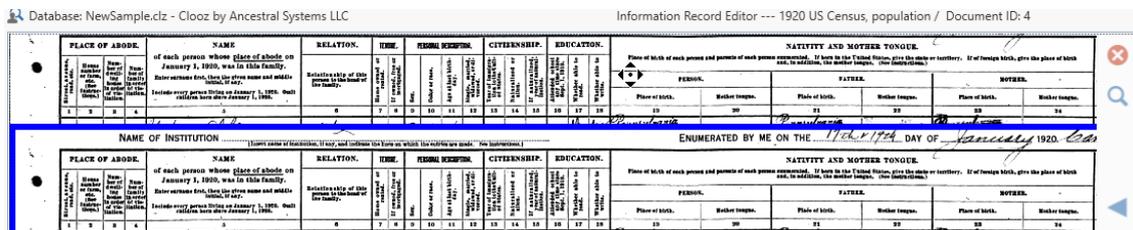
1. Make sure the image is properly oriented. The rows must be horizontal (with no tilting). Use the rotation adjustment in the Image Viewer's Control Panel to level the image if needed.

Chapter 6

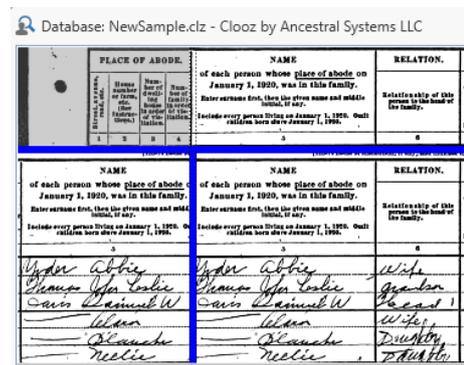
- Now grab hold of the top blue bar (hover cursor over it and click) and drag it down to create enough space for your column headers.



- With the cursor positioned in the top area (above the bar you just moved), click and hold down the left cursor button. Drag the image upward to until the column headers on the image are in view.



- Now do a similar setup with the bar on the left side, dragging it in and then positioning the overlay image to show the rows of the Name column.



- The overlays are now setup. In the main image area, start panning and zooming to notice that the overlays will continue to show what row and column you are looking at.

When zooming the main area, the overlays will zoom as well, so you may need to adjust the size of the overlay areas by moving the bars and / or repositioning the overlay images.

Database: NewSample.c1z - Clooz by Ancestral Systems LLC Information Record Editor --- 1920 US Census, population / Document ID: 4

RELATION.	EDUC.	FAMILY SIZE	CITIZENSHIP.	EDUCATION.	SATIETY AND MOTHER TONGUE.						INDUSTRY, BUSINESS, OR OCCUPATION.	AGE
					PERSON.		FATHER.		MOTHER.			
					Place of birth.	Mother tongue.	Place of birth.	Mother tongue.	Place of birth.	Mother tongue.		
Thomas J. J. J. J.	W	9	S		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	2	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	3	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	4	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	5	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	6	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	7	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	8	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	9	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	10	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	11	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	12	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	13	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	14	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	15	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	16	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	17	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	18	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	19	
John J. J. J. J.	W	17	HH		Pennsylvania	Pennsylvania	Pennsylvania	English	English	Farmer	20	

Correcting Image Orientation (Rotation)

Images are sometimes incorrectly oriented sideways or upside down, or perhaps just at a slight annoying angle. Do one of the following to correct this as needed (either using Control Panel features or keyboard commands when the image has program focus (has been clicked at least once)):

Rotation Action	Control Panel	Keyboard
Rotate 90 deg Clockwise or Counter-Clockwise	90 deg rotation buttons	Ctrl+Shift+R or L
Rotate 2 deg increment	Slight rotation buttons	Ctrl+R or L
Restore original rotation angle	Rotation Reset button	Ctrl+N



When using the row and column header overlays it is important that you first have the image correctly oriented such that rows in the image are horizontal oriented.

Improving Image Viewing

If you are having a difficult time reading the data in an image, try adjusting the brightness and contrast using those controls in the Control Panel. Click and drag the appropriate slider bar. Click the Reset button to return the values to the original setting (or press Ctrl+B).

PDF File Viewer

Portable Document Format (PDF) is a commonly used file format developed by Adobe in 1992. There is a special viewer in Clooz to support this format.



For instructions on linking digital media files to Clooz records and displaying

them in media viewers such as this one, see [Working with Digital Media Files](#).

This viewer can either be shown embedded in the Clooz editor (see above), or as a floating external file (see image to right). You can switch the display more back and forth by clicking on the button in the upper right part of the viewer which has a diagonally oriented arrow.

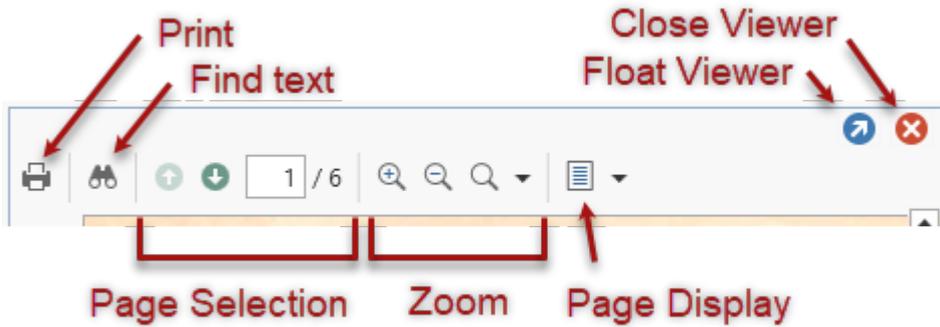


To close the viewer, click the red X button (upper right corner of viewer).

PDF Viewer Components

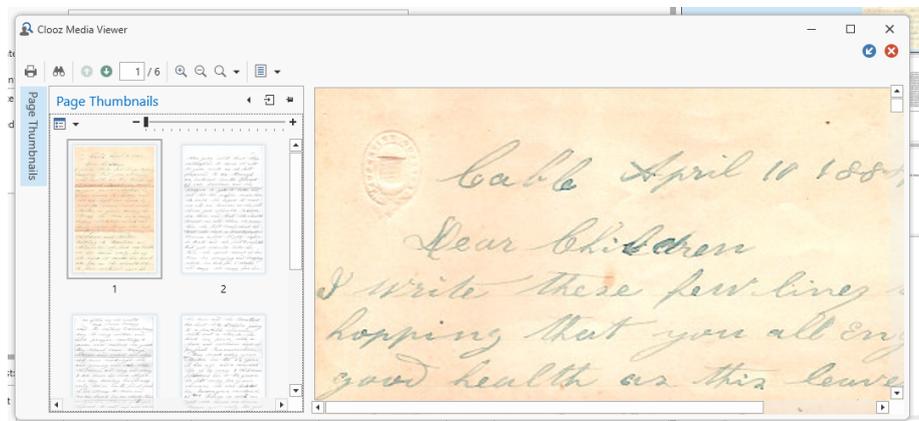
Toolbar

Click the appropriate button on the toolbar to perform the various actions shown:



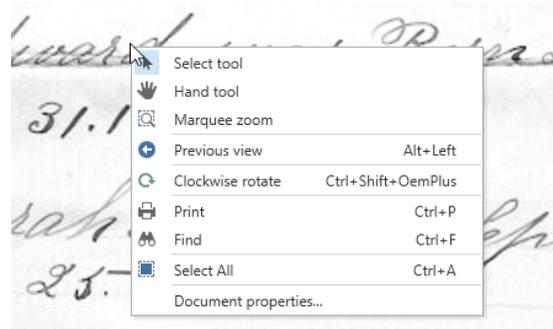
Thumbnail Panel

The thumbnail panel can be shown or hidden by clicking the Page Thumbnail button on the left side of the viewer. This panel allows you to select document pages by clicking on the page's thumbnail.



Context Menu (right click)

When you right-click inside the PDF viewer, a context menu will popup containing some commands that are the same as those in the toolbar, or in other cases, are additional to those in the toolbar.



Actions associated with these are described below.

Navigating a Document

There are several ways to navigate between pages in the document being viewed:

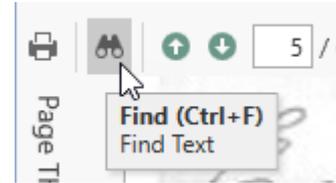
- Use the scrollbars.
- Click the Previous or Next buttons in the toolbar, or enter the page number directly into the Pager field on the toolbar and press Enter.
- A specific zoom level can be selected from a drop-down list with the zoom button in the toolbar.
- Display the Page Thumbnail panel and click the desired page thumbnail.

To jump back to the section previously viewed, click the Previous View command in the context menu (or Next View to return from a previous view). This can be done by keyboard command as well (Alt+Left or Alt+Right).

You can also move a page with the Hand tool (select in the context menu). The Hand tool enables you to scroll content by dragging the document instead of using scrollbars.

Searching for Text

If the currently loaded PDF file is based on text characters (as opposed to an image of text), you can search for text values using the Find text button (or select the same in the context menu).



After clicking the Find button, a search bar will appear into which you should enter the text you are searching for. There are several options you can select from to define how the search will be done.



Search for text in images is not supported at this time.

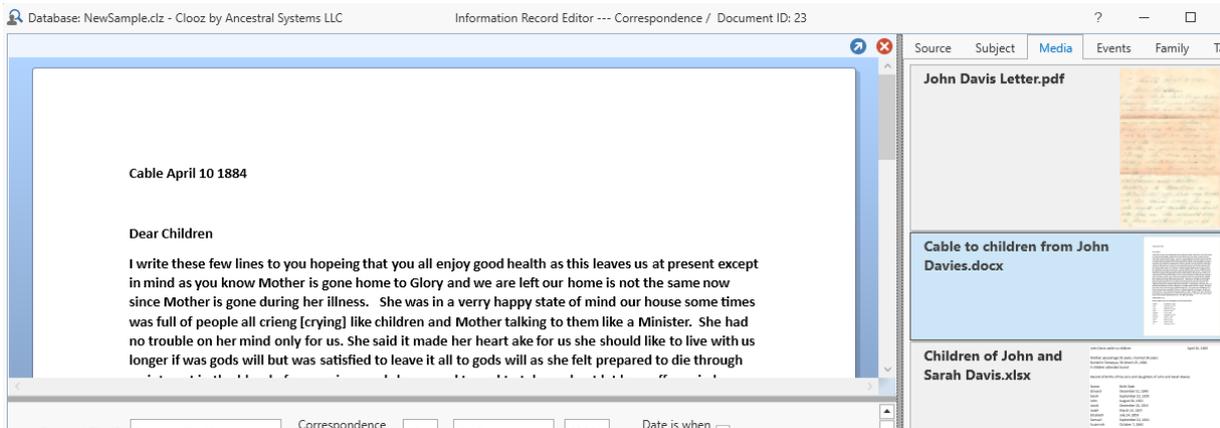
Adjusting the Document View (rotation, zoom)

Use the rotation items in the context menu to rotate the document view either clockwise or counter-clockwise. This can also be done via keyboard commands: Ctrl+Shift+NumPad Plus or Minus.

You can zoom into or out of a document using any of the following methods:

- Zoom buttons in the toolbar
- Selecting the Marquee Zoom tool in the context menu, and then clicking the cursor (press Ctrl key to zoom out).

Text Viewer



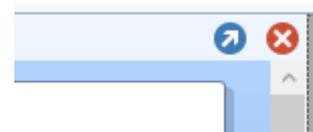
The text viewer in Cloomz supports a number of text file formats:

- Plain Text (.txt)
- Rich Text Format (.rtf)
- Microsoft Word documents (.doc, .docx)

The text is only presented for viewing. It is read-only, so editing and saving are not supported.

For instructions on linking digital media files to Cloomz records and displaying them in media viewers such as this one, see [Working with Digital Media Files](#).

Like the other media file viewers in Cloomz, this viewer can either be shown embedded in the Cloomz editor, or as a floating external file. You can switch the display more back and forth by clicking on the button in the upper right part of the viewer which has a diagonally oriented arrow.



To close the viewer, click the red X button (upper right corner of viewer).

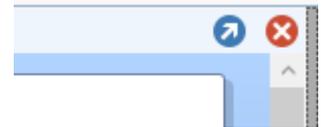
Spreadsheet Viewer

The spreadsheet viewer in Clooz can be used to view data you have in Microsoft Excel spreadsheets (.xls, .xlsx formats).

The data is only presented for viewing. It is read-only, so editing and saving are not supported.

For instructions on linking digital media files to Clooz records and displaying them in media viewers such as this one, see [Working with Digital Media Files](#).

Like the other media file viewers in Clooz, this viewer can either be shown embedded in the Clooz editor, or as a floating external file. You can switch the display more back and forth by clicking on the button in the upper right part of the viewer which has a diagonally oriented arrow.



To close the viewer, click the red X button (upper right corner of viewer).

Chapter 7

Editing Information Records

Information records in Clooz are what hold the data content that you extract from some information source. The Information Record editor is where you edit either new or existing Information Records. You will use corresponding Source records to save higher-level source citation about the document, website, book, or whatever which contains the information you extracted, and link Subject records to this Information Record (one for each person or other subject type mentioned in the record).

The Information Record Editor

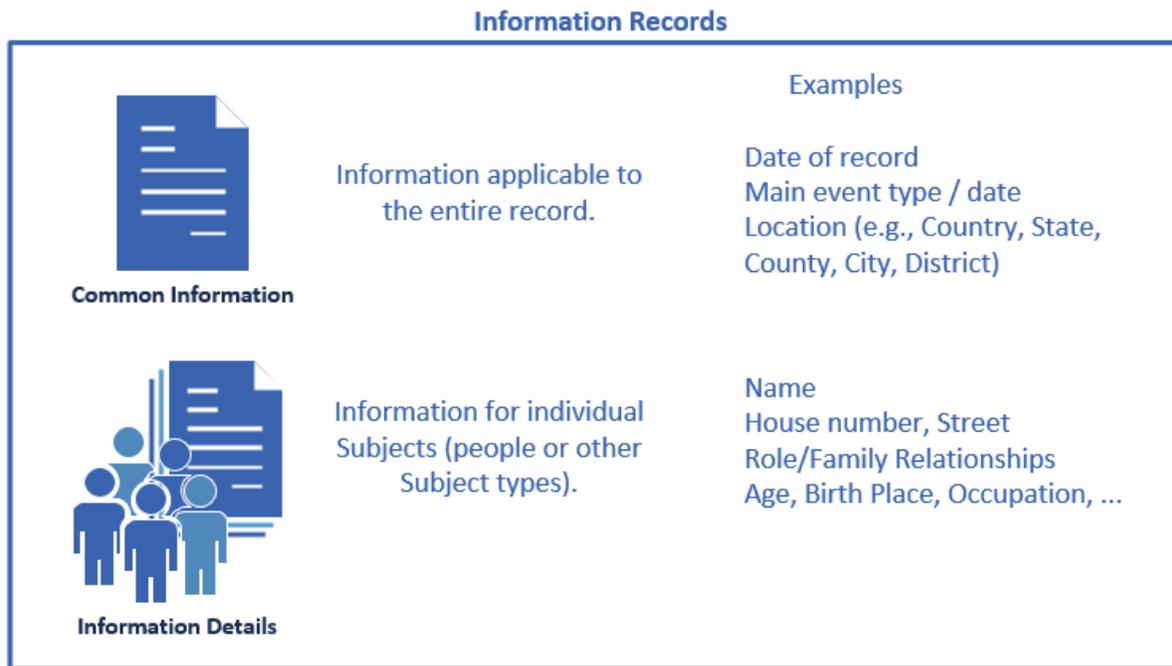
The Information Record Editor uses templates for entering data from information sources. The collection of templates is listed in the Navigation Panel of the Information page (main screen). When creating a new Information Record first select which type of data template best relates to the information source you have found. Some templates are designed to exactly match the information source, like censuses for specific countries and years. Other templates are more general in nature, and simply contain data fields that typically would be contained in those type of information sources but have somewhat variable formats (ex., birth or death certificates). Finally, generic templates are available which don't represent any particular type of information source, but have fields that are usually of most interest and usefulness in family history research.

Data Entry Field Pages

Clooz has two types of template components for you to extract the document data based on whether the information applies to the document as a whole and all the

people you link to the record, or is specific to a given Subject. In Clooz we call these:

- Common Information, and
- Information Details



Information Record Template Formats

Clooz templates for Information Records use one of two general formats:

- Form-based Templates, and
- Tabular Templates (new in Clooz 4).

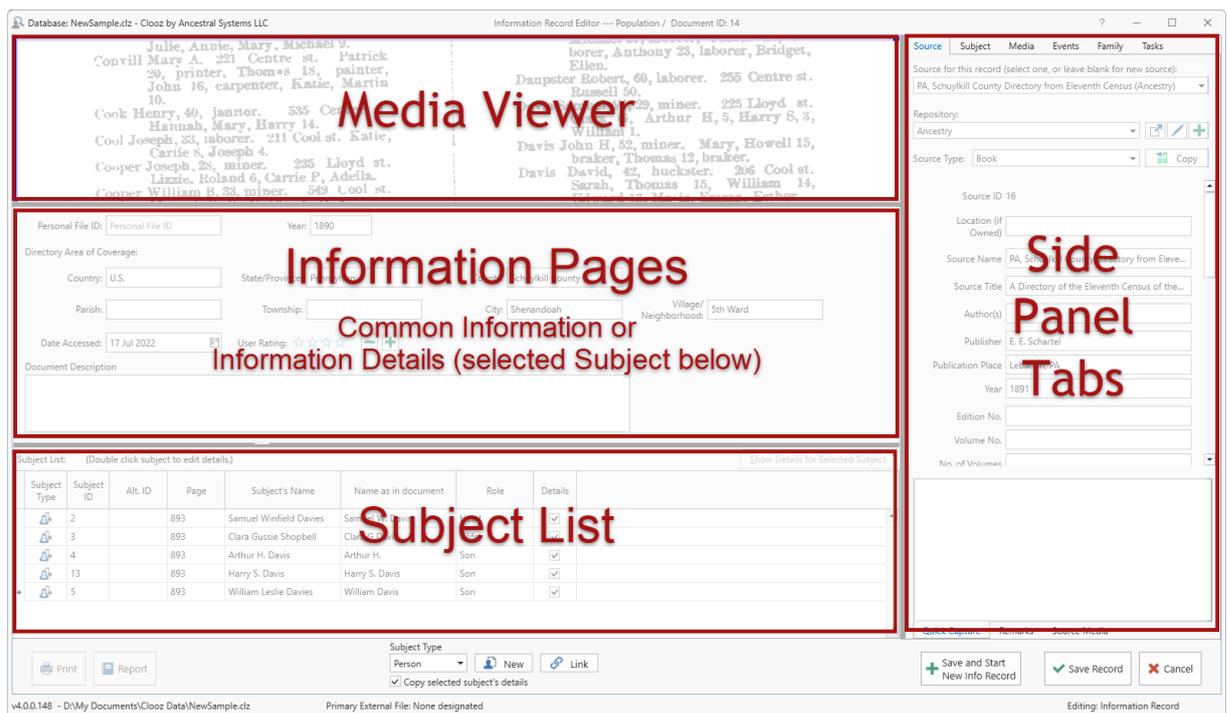
Each Clooz template has one area for the Common Information. The difference however, is how the templates display the detailed data for each Subject. Form-based templates have a separate page of fields for each person listed in the data source, while tabular templates have a single spreadsheet-like grid where each Subject's details occupy a row in the grid, with columns for each data field.

Many information sources are laid out in a ledger or tabular type format (such as censuses, church record books, ship passenger lists, and directories), where there are usually rows of information for a particular person. Templates for these types of

information use a gridded format for the Information details, more closely resembling the layout of the source itself. Other templates for non-tabular layouts (forms, certificates, plain text, etc.) use the form-based layout, where the details for each person are displayed a page at a time. In some cases, templates are available in both formats for the same type of information source, with the tabular one designated as "[tabular]" in its name.

Form-based Templates

Form-based templates have an overall layout as shown below. The top section is reserved for the internal Clooz media viewer, which is optionally displayed. The middle section displays either a page of common fields applying to the whole Information Record (main event, event date, location, etc.) or a page of detailed information pertaining to whichever Subject is selected in the Subject List appearing in the bottom section. The side panel on the right has several tab pages providing access to related records (such as the Source record, Subject records, attached media items, derived event and family information, and search tasks under which this Information Record was found.



The media viewer is discussed in [Working with Digital Media Files](#).

The Subject List shows a list of those Subjects that you have linked to this Information Record. These could be new Subjects you just created or existing ones. For instructions on how to make these linkages, see the topic: [Associating Subjects with an Information Record](#).



The Subject selection in the list is what controls what detail fields will be shown in the editor, as well as which Subject record data is editable in the right-side panel under the Subject tab.

Tabular Templates

New in Clooz 4 are tabular style templates. Much of the Information Record editor is the same as with form-based templates except for the way Subject details are presented. As mentioned earlier, the tabular templates are meant to match documents that are in tabular form, such as censuses, church register books, voting registers, etc.

The screenshot displays the 'Information Record Editor' window for a 1940 US Census document. The interface is divided into several key sections:

- Media Viewer:** Located at the top, it shows a scanned image of the original census document with handwritten entries. A red box highlights a portion of the document.
- Common Information Page:** Below the media viewer, this section contains fields for 'Personal File ID', 'Census Date' (1 April 1940), 'Country' (US), 'State' (Pennsylvania), 'Supervisor's District No.' (13), 'Date Accessed' (16 Jul 2022), and 'User Rating'.
- Subject & Information Details Grid:** This is a table with multiple columns including 'Date Census Taken', 'Sheet', 'Line', 'Street', 'Household Data', 'Surname', 'Given Name', 'Relationship', 'Sex', 'Race', and 'Age'. It lists subjects such as Samuel W Davis Jr, Stella Lotovich, Elizabeth Davis, Dolores Davis, Samuel C. Davis, Frances Lotovich, and Charles Lotovich.
- Side Panel Tabs:** On the right side, there are tabs for 'Source', 'Subject', 'Media', 'Events', 'Family', and 'Tasks'. The 'Source' tab is active, showing details for 'Source ID 14', 'Location Owned', 'Source Name', 'Source Creator', 'Item Number', 'File Number', 'Collection No.', 'Cost (if Purchased)', and 'File or Collection'.

At the bottom of the window, there are buttons for 'Print', 'Report', 'Subject Type' (set to Person), 'New', 'Link', and 'Copy selected subject's details'. There are also 'Save and Start New Info Record', 'Save Record', and 'Cancel' buttons.

The grid displaying the Subject details (one row per Subject) has a number of features:

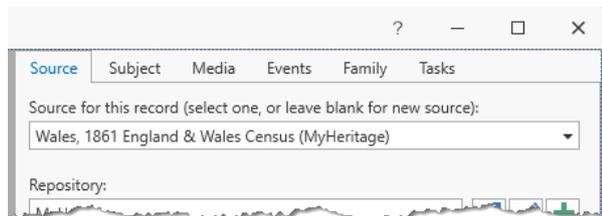
- Depending on the type of document the template is designed for, there can be multiple page tabs. These are used when the template would require an excessive width to capture all the data columns, or the original document itself has multiple pages or sections.
- When templates have a large number of columns, columns on the left (which identify who the row applies to) are fixed into position and will not scroll as the other columns are scrolled horizontally. This allows you to always know which row is being edited.
- Note that the name and ID value from the Subject record is displayed in the first column, not to be confused with the name as it actually appeared in the document (shown in a later column).

- Columns cannot be moved in a template, however they can be resized (click and drag a column separator) or sorted by clicking on the column header (hold down the Alt key while clicking to designate secondary sort columns). Clicking a column header a second time reverses the sort order, and a third time returns the column to its original unsorted state. The column widths and sorting are saved and will be applied again the next time you use that type of Information Record template.

Main Sheet		Supplementary Questions																	
Date Census Taken (enumeration date)	Sheet	Line	Location		Household Data				Surname	Given Name	Relationship	Personal Description				Education		Place of Birth	
			Street	House Number	Family No.	Owned or Rented	Value of Home	Room?				Sex	Race	Age	Marital Status	Attended School	Highest Grade		
Samuel W Davis, Jr. [G]	19 APR 1940	178	74	Fern	1133	293	O	1400	<input type="checkbox"/>	Davis	Samuel	Head	M	W	37	M	<input type="checkbox"/>	H-4	Pennsylvania
Stella Lotovich [29]	19 APR 1940	178	75	Fern	1133	293			<input type="checkbox"/>	Davis	Stella	Wife	F	W	36	M	<input type="checkbox"/>	6	Poland
Elizabeth Davis [37]	19 APR 1940	178	76	Fern	1133	293			<input type="checkbox"/>	Davis	Elizabeth	Daughter	F	W	13	S	<input checked="" type="checkbox"/>	7	Pennsylvania
Dolores Davis [38]	19 APR 1940	178	77	Fern	1133	293			<input type="checkbox"/>	Davis	Dolores	Daughter	F	W	8	S	<input type="checkbox"/>	2	Pennsylvania
Samuel C. Davis [39]	19 APR 1940	178	78	Fern	1133	293			<input type="checkbox"/>	Davis	Samuel Jr	Son	M	W	6	S	<input checked="" type="checkbox"/>	0	Pennsylvania
Frances Lotovich [40]	19 APR 1940	178	79	Fern	1133	293			<input type="checkbox"/>	Latovich	Frances	Mother in Law	F	W	58	Wd	<input type="checkbox"/>	2	Poland
Charles Lotovich [41]	19 APR 1940	178	80	Fern	1133	293			<input type="checkbox"/>	Latovich	Charles	Brother in Law	M	W	20	S	<input type="checkbox"/>	H-1	Pennsylvania

Information Record Editor Side Panel

The panel on the right side of the Information Record editor contains six tabbed pages. Each of these are described in their own help topics:



- Source Tab - Select and edit the source citation data for where the Information Record's data came from.
- Subject Tab - View or edit the Subject record for the Subject that is currently selected in the Subject list or tabular grid. For a complete description of how Subjects can be linked to this Information Record, see Associating Subjects with an Information Record.

- Media Tab - Here is where you link digital media files to the Information Record and control their display in the media viewer.
- Events Tab - You can extract an unlimited number of events from the data in the Information Record.
- Family Tab - You can document family relationships for the Subjects linked to this Information Record.
- Tasks Tab - Here is where you can view this Information Record's connection to Research Tasks (searches) or even create new Research Objectives or Tasks.

Information Record Editor Bottom Panel

The panel at the bottom of the Information Record editor (just above the status bar) contains buttons to initiate a number of actions:

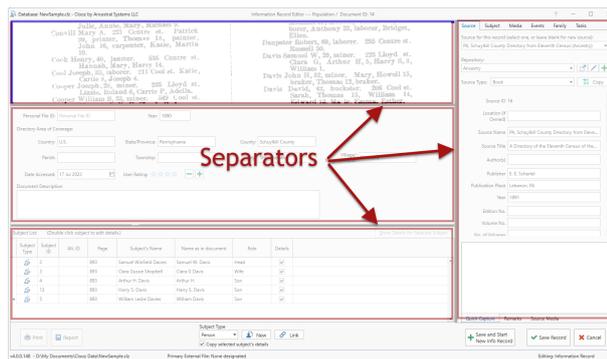
- *Print* - [coming soon]
- *Report* - [coming soon]
- Connecting a Subject with the Information Record
 - *New* - Creates a new Subject record and links it
 - *Link* - Select an existing Subject record to link
- *Save and Start New Info Record* - Saves the

Information Record currently being edited, and then displays a list of Information Record templates for you to choose from to create a new Information Record and edit it.

- **Save Record** - Saves any changes to the Information Record currently being edited (as well as Source and Subject records that might have been edited in the side panel) and then closes the editor screen.
- **Cancel Record** - Discards any changes to the Information Record (or the record entirely if it was newly created) and then closes the editor screen.

Adjusting Size of the Editor Sections

Use the separator bars between the different editor sections to resize the areas.



Position the cursor over the separator bar to see the up-down or left-right arrow. Click and drag the bar to resize the adjacent areas.



Associating Subjects with an Information Record

You have setup an Information Record to hold the data contained in a document you found, and hopefully already cited the source of that information. Some of the information was general in nature, but much of what you care about even more is who were the people mentioned in the document and what information was contained about them. To record this information you have to setup Subject records

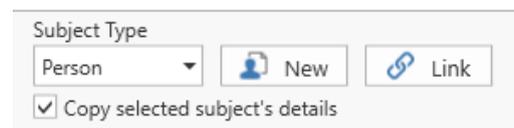
in Clooz (if you believe they might be new to your Clooz database), and then link the Subject records to the Information Record. After doing that you will then be entering the detailed information about them.

When setting these Subject to Information Record links, there are two basic things you need to identify:

1. **What type of Subject is it?** In probably 99% or more of the cases it will be a person. However, Clooz does support other Subject types (businesses, real estate, ships, artifacts) since they might be what you are researching.

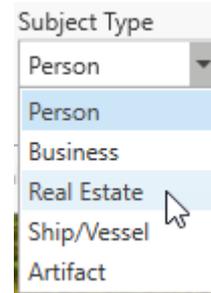
2. **Is this Subject already in your database?** This makes a difference in how you will proceed. However, this decision isn't quite so easy as the first one was. In many cases the names match someone you already have as a Subject and your first reaction is that you know who the person is; but after considering the possibility it is someone else you might not be so sure. **The safe approach in Clooz is to treat these as new Subjects.** Later on, when you have overwhelming evidence that several of your Subjects are in fact the same person, it's easy to merge the Subject records. It's much more difficult to separate a Subject out into multiple Subjects after you made some premature assumptions that they were the same person. All of that said, there will be times when you are absolutely certain you have the Subject identities correct and want to jump ahead to linking in the existing Subject rather than creating a new one.

Once you've sorted that out in your head, its time to move forward and setup these links in Clooz. At the bottom of the Information Record editor you will find the buttons to create these Subject to Information Record links. You will either create a new Subject of the selected type, or link an existing Subject.



Selecting the Subject Type

Regardless of whether this is a new Subject or linking an existing Subject, the first step is to make sure the type of Subject listed is what you need. If it not showing the type of Subject you want to add, click the down arrow to display the list of Subject types permitted with the current Information Record template.



Adding a New Subject

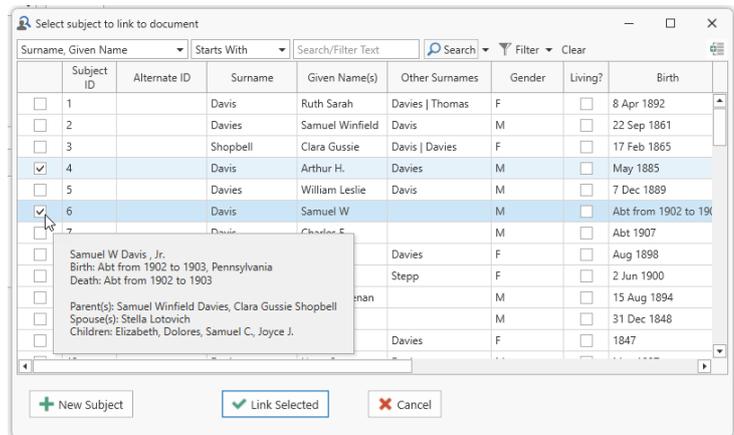
Click the New button to have Clooz create a new Subject record and link that Subject to the Information Record all in one operation.

Clooz will automatically give the Subject the name you enter in the Information Record details for that Subject (i.e., the actual name shown in the document you are recording). You can later adjust the name in the Subject record itself to be a more common spelling or preferred form of the name.

You can edit the Subject record while still in the Information Record editor using the fields shown in the right side panel under the Subject tab. The values show here are the Subject record for the Subject currently selected row in the list of linked Subjects or grid of details (depending on what type of template it is, form-based or tabular).

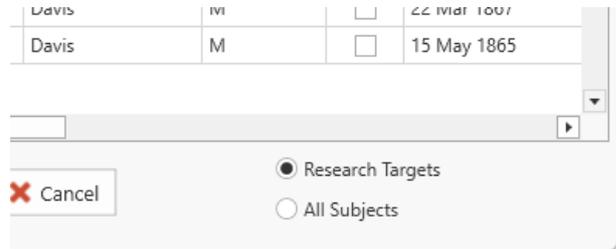
Linking an Existing Subject

Click the Link button to link existing Subjects to the Information Record being edited. After clicking this button, a Subject Selection dialog window will appear for you to choose one or more Subjects to link.



To link one Subject, double-click that row in the Subject Selection dialog. To link a set of Subjects, click the checkboxes on the left side of the Subjects you want to include. Then click the Link Selected Subjects button to link all of those selected to the Information Record.

If the Information Record editor was activated from a Research Task, and the Research Objective associated with that task had targeted Subjects designated, an additional feature becomes active.



The Subject selection dialog includes the ability to display only the target Subjects or all Subjects. Select the desired list choice in the lower right corner of the selection window.



Right-click a row to display a popup window providing additional information to help identify the Subject. For people Subjects, this includes their family relationships (assuming you had earlier entered Information Records associated with those people that included family descriptions).



The list of Subjects in the Subject Selection dialog can be searched and filtered using the same toolbar methods as on the main screens of Clooz.

Copying Subject Details

When the *Copy selected subject's details* checkbox is checked, Clooz copies a subset of the detail fields from one Subject's details into the newly added Subject. These are fields which have been determined to be more likely than not the same as the previous Subject (such as surname when entering what is usually a family unit). The examples shown here are from a form-based template, but the same applies to tabular templates.

The arrow indicator shows which record is being edited (either in the details pane above if this is a form-based template, or in the same row if a tabular style template).

Page(s):	22	Surname:	Davis	Given Name:	Samuel
Event Date:	12 Oct 1942	Role:	Father		
Name of []					
Subject List: (Double click subject to edit details.)					
Subject Type	Subject ID	Alt. ID	Page	Subject's Name	Name as in document
▶	2			Samuel Winfield Davies	Samuel Davis
*	3		22	Clara Gussie Shopbell	Davis

Arrow designates the Subject whose details are being edited

Asterisk designates source

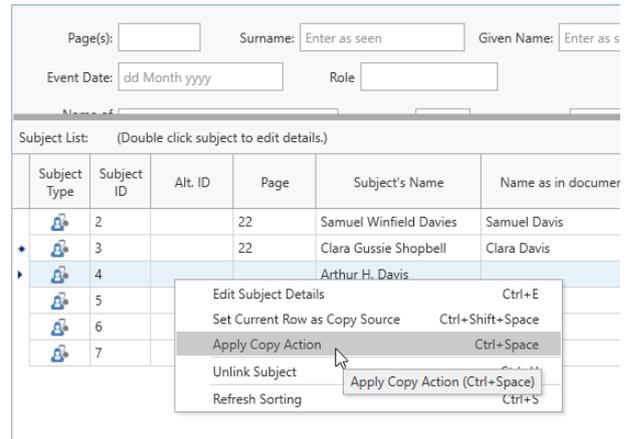
Before any details can be copied there needs to be a Subject already linked to the Information Record and designated as the source for copying (an asterisk indicator appears in the left-most column).



When a Subject record is selected for both editing and as the source for further copying, only the asterisk is visible.

When the copy mode is active, any time a new Subject is created or a single existing Subject is linked to the Information Record, the details values from the "source" Subject will be immediately copied to the one just added. The newly added Subject will then be designated as the copy source for further additions.

When using the Link button to link existing Subjects to the Information Record, if multiple Subjects are selected to be linked in the same Link action, the copying of details does not occur until designated by the user. This is done to allow the user to control the order in which the copying is done (important in cases where there is a line number that is automatically incremented), or even done for all records.



To apply the copy action to a selected record, do one of the following in either the list of linked Subjects (form-based templates) or the grid of Subject details (tabular templates):

- Right-click the row to display the context menu. Select *Apply Copy Action*.
- Press Ctrl-Spacebar when the row is selected, or
- Ctrl-Click the row.

You can also change which Subject will be the copy source by doing one of the following in either the list of linked Subjects or in the case of tabular templates, the grid of Subject details:

- Right-click the row to display the context menu and select *Set Current Row as Copy Source*,
- Press Ctrl+Shift+Spacebar, or
- Ctrl+Shift+Click the desired row.



You can copy data more than once to the same row if you have made changes in the source row and want to add those to the target row. Just designate the row to serve as the copy source and then apply the copy action to the target row (using the methods just described above).



Data is only copied to the target row when the field in the target row is blank. The copy action discussed here will not overwrite existing data.

Editing the Subject Record

The data entered into Information Records reflects what was shown in the document you found, and you could link Subjects to this record. However, what if you want to edit the Subject record itself, such as adjusting the spelling of the name of a person that will appear in the main list of Subjects. Obviously, this can be done in the Subject editor, but you can also do this without exiting the Information Record editor by going to the right-side panel and clicking on the Subject tab. The Subject panel contains all the editable data fields making up a Subject record.

The Subject whose record is displayed in the side panel will be whichever Subject is currently selected in the Subjects list (form-based templates) or the grid of Subject details (tabular templates). If no Subject is selected, the fields in this panel will be blank and non-editable.

The screenshot shows a web-based form for editing a subject record. The 'Subject' tab is selected, and the form contains the following fields and values:

- Surname: Davies
- Given Name: Samuel Winfield
- Prefix: (empty)
- Suffix: (empty)
- Nickname: (empty)
- Alias: (empty)
- Married Names: (empty)
- Sex: M
- Living?:
- Alternate IDs: (empty)
- User Field 1: (empty)
- User Field 2: (empty)
- Birth Date: 22 Sep 1861
- Birth Location: Winfield, Schuylkill County, P...
- Marriage Date(s): Abt 1884
- Marriage Location: (empty)
- Death Date: 24 Feb 1923
- Death Location: Shamokin, Northumberland...
- Contact Information:
 - Address: (empty)
 - Phone: (empty)
 - Email: (empty)
- Remarks: (empty)

At the bottom of the form, there are three buttons: 'Save and Start New Info Record', 'Save Record' (with a green checkmark icon), and 'Cancel' (with a red X icon).

When a new Subject record is created to link to the Information Record being edited, the name of the Subject in the Subject record will be filled in based on the name entered in the Information Record details for that person. However, once you edit the name in this side panel, it will remain as you entered it and not change again if you happen to edit the name fields in the details.

Any changes you make in this side panel will be saved only if you save the Information Record being edited.

Source Citation Data

One of the most basic best-practices in doing family history research is to cite the source of the information being entered. For a description of the source records in Clooz, see the [Clooz data organization topic](#). Source records are listed on the main screen Source tab, where the Source editor can be used. However, Source records can also be created or edited within the Information Editor using the Source tab its right-side panel.

You have several ways to cite the source data using this panel:

- Use an existing source, as is, by selecting it in the drop-down list at the top of the panel,
- Use an existing source as a template for further tailoring of details by selecting it in the drop-down list at the top of the panel, and then click the Copy button to start a new source containing the data from the existing one,

The screenshot shows the 'Source' tab of the Clooz application. At the top, there are tabs for 'Source', 'Subject', 'Media', 'Events', 'Family', and 'Tasks'. Below the tabs, there is a dropdown menu for 'Source for this record (select one, or leave blank for new source):' with 'US, 1940 Federal Census (Ancestry)' selected. Below this is a 'Repository:' dropdown with 'Ancestry' selected, and a 'Source Type:' dropdown with 'Register' selected. There are icons for 'Copy' and a 'Copy' button. The main area contains a scrollable list of source details: 'Source ID 14', 'Location (if Owned)', 'Source Name' (US, 1940 Federal Census (Ancestry)), 'Source Title' (1940 United States Federal Census, population s...), 'Source Creator', 'Item Number', 'File Number', 'Collection No.', 'Cost (if Purchased)', 'File or Collection' (US Federal Census Collection), and 'User Rating' (four stars, minus and plus buttons). At the bottom, there is a 'URL:' field with the placeholder 'Save a URL here for quick reference' and a 'Quick Capture' button. The bottom of the panel has tabs for 'Quick Capture', 'Remarks', and 'Source Media'.

- Start a new source from scratch by leaving the source selection box at the top of the panel blank. Select the desired Repository and Source Types, then edit the rest of the fields.

When editing a Source, the Repository can be changed by selecting a different one from the drop-down list, or click one of the button functions provided.



At the bottom of the panel is a set of three tabs providing additional functions:

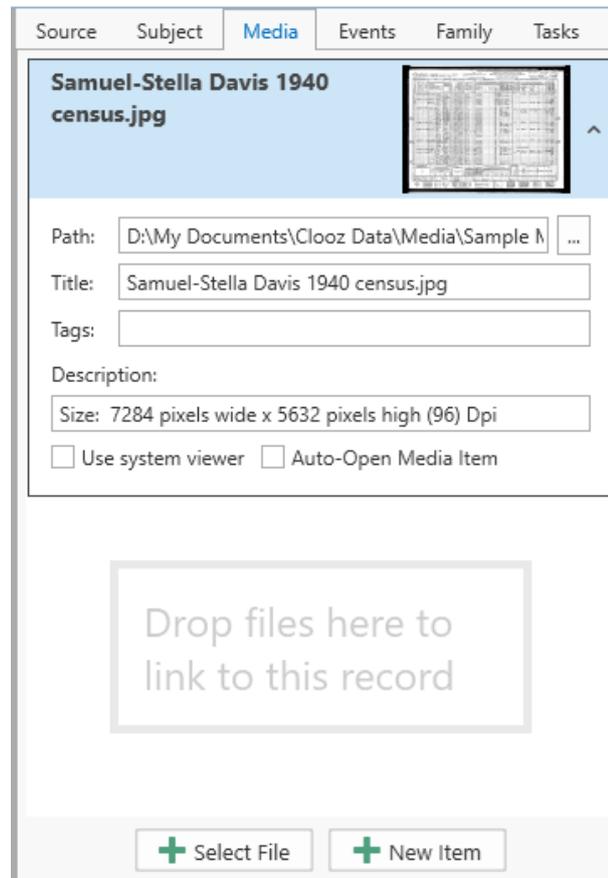
- Use the Quick Capture area to deposit source citation information. For example, if you are gathering data from a web site that displays a block of source citation data, copy and paste the contents of that block into this field. A field is also provided to paste the URL address of web sites for easy retrieval (not recommended for long term reference since web sites frequently change). The priority here is to capture the information needed for an accurate citation. Getting it into the desired format can happen later.
- The Remarks tab provides space for you to put in general remarks about the source document.
- The Source Media tab displays a list of the media files attached to this Source record. Files can be added by right-clicking in the box to display the context menu. For more complete control of the media files attached to the Source, use the Source editor.

Media Links

A list of the media files you have attached to this Information Record is shown in the right-side panel under the Media tab. Click the down arrow to the right of the item's thumbnail image to display the Media record fields.

To add a media link to the Information Record, do one of the following:

- Drag and drop a file from the Windows file explorer onto the Media Panel in Clooz,
- Click on the Select File button and then select a file from the file selection dialog window that pops up,
- Click the New Item button to add an unspecified media item, then open the new media item and enter in the file location.



The screenshot shows the 'Media' tab in a software interface. At the top, there are tabs for 'Source', 'Subject', 'Media', 'Events', 'Family', and 'Tasks'. Below the tabs, the title 'Samuel-Stella Davis 1940 census.jpg' is displayed next to a thumbnail image of a census document. A dropdown arrow is visible to the right of the thumbnail. Below the title and thumbnail, there are several input fields: 'Path' (D:\My Documents\Clooz Data\Media\Sample N), 'Title' (Samuel-Stella Davis 1940 census.jpg), and 'Tags'. A 'Description' section contains a text box with 'Size: 7284 pixels wide x 5632 pixels high (96) Dpi' and two checkboxes: 'Use system viewer' and 'Auto-Open Media Item'. At the bottom of the panel, there is a large grey box with the text 'Drop files here to link to this record'. Below this box are two buttons: '+ Select File' and '+ New Item'.

To unlink a file from the Information Record, right click the header section of the media item and select *Unlink Selected Item* from the context menu.

When a media file is first linked to an Information Record, the Media record fields are loaded with data found in the properties of the media file in Windows.

Clicking on the thumbnail image will open the file in the media viewer. For a complete description of this feature, see [Using the Media Viewer](#).

Extracting Event Information

Clooz allows you to extract event information from the data entered in an Information Record. These events should be strictly limited to those supported by the data in this Information Record and not in combination with any other data source or record. These events may in fact conflict with events defined in other Information Record. The purpose here is to identify what the various Information Records tell you to then make an informed judgment on what a concluding set of events for a Subject should be based on the complete set of available information.

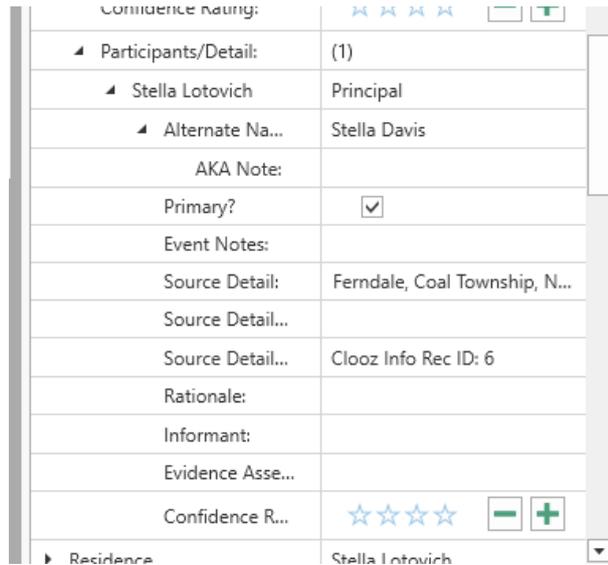
Source		Subject		Media		Events		Family		Tasks	
Event / Parameters						Data Values					
▶ Birth						Samuel W Davis, Jr.					
▶ Residence						Samuel W Davis, Jr.					
▶ Residence						Samuel W Davis, Jr.					
▶ Occupation						Samuel W Davis, Jr.					
▲ Birth						Stella Lotovich					
Date:						Bet Apr 1903 and Apr 1904					
Location:						Poland					
Place Detail:											
Description:											
Remarks:											
Rationale:											
Informant:											
Evidence Assess...											
Confidence Rati...						☆☆☆☆ - +					
▲ Participants/Det...						(1)					
▶ Stella Lotovich						Principal					
▶ Residence						Stella Lotovich					

AutoGenerate Events + Add New Event

The events you extract are listed in the right-side panel under the Events tab.

The event records each provide fields for the date and location for the event, as well as a description (e.g., actual occupation in an occupation event), and remarks. Any rationale for the event's accuracy can be described, as well as the all important assessment of who the informant was and its assessment as evidence. The evidence assessment field is left as free text for the user to apply whatever system they choose to follow, such as identifying the source as original, derived, or authored, the information as primary or secondary, and the evidence as direct or indirect. See the list of [recommended references](#) regarding evidence analysis techniques. An additional [star-based confidence rating](#) field is also provide (supporting both positive and negative assessments).

Each event has a list of participants, with a set of data fields allowing you to document further notes, source details, and evidence assessments for each participant.

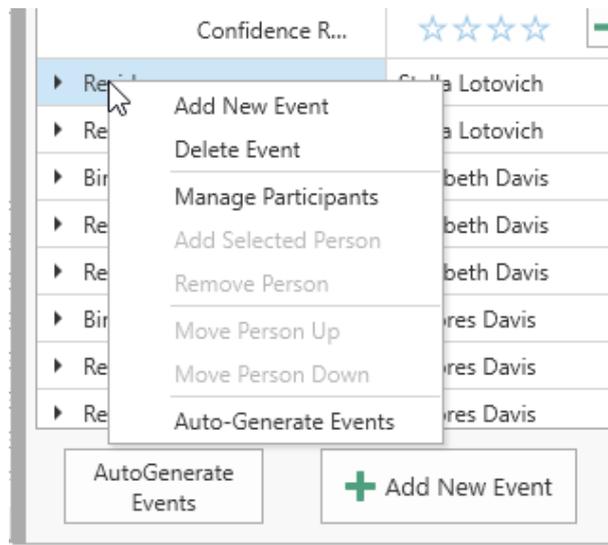


Adding Events to an Information Record

There are several ways to add events to an Information Record.

Automatic Event Generation

Click the *AutoGenerate Events* button (or right click a row and choose that command from the context menu) to have Clooz generate a set of events when the Information Record details clearly define these. Census documents are rich sources for automatically defining events (approximate birth dates based on age, occupations, religion, residence, etc).

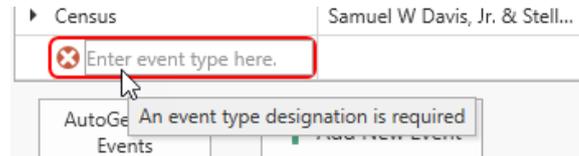


If there are already events for the Information Record, Clooz will ask if the new events should replace existing ones, or be added in addition to the existing ones.

Manually Add New Event

To define your own events, click the Add New Event button (or right click a row and choose that command from the context menu). A blank event will be added to the list. You will then need to perform the following steps:

1. Enter the type of event it is, then enter the date, location and other details.
2. Now add participants to the event using one of the methods described in [Managing Event Participants](#).



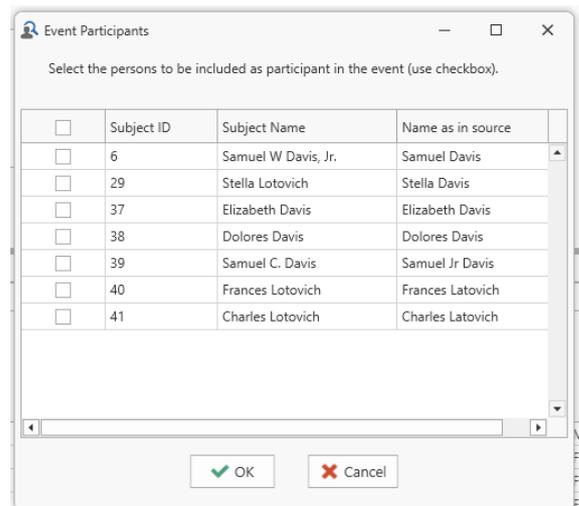
Deleting Events from an Information Record

To delete an event, right-click on the event and select *Delete Event* from the context menu that pops up.

Managing Event Participants

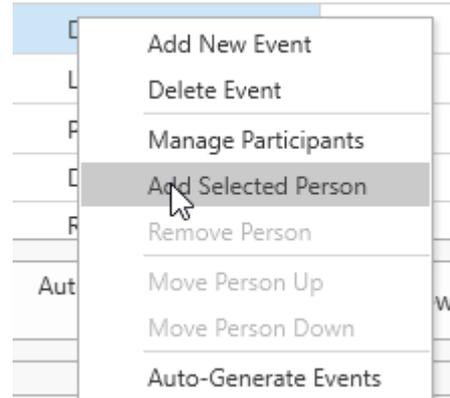
There are two methods for adding participants to an event:

- Manage Participants Command
 - Right-click the event (any row within the event) and select *Manage Participants*. A window will pop up listing the Subjects linked to the Information Record. Set the checkboxes for all of the Subjects that are to be participants in the event. Clear the checkbox for any not to be



included. Click OK.

- Once the names appear in the event panel, update their role in the event (the field to the right of their name).
- Adjust the title of the event if required (field to the right of the event type).
- Add Selected Subject
 - Select a Subject in the Information Record's list of Subjects (or tabular grid).
 - Right-click in the event, and click *Add Selected Person* (or whatever type the selected Subject is).
 - Repeat as necessary for other participants.
 - Once the names appear in the event panel, update their role in the event (the field to the right of their name).
 - Adjust the title of the event if required (field to the right of the event type).



To remove a participant from the event, right-click the participant in the event and select *Remove Person* in the context menu that pops up.

You can change the order of the participants by right-clicking the one you want to move and select *Move Up* or *Move Down* in the context menu which pops up.

Extracting Family Groups

Clooz allows you to extract family groupings from the data entered in an Information Record. These family relationships should be strictly limited to those supported by the data in this Information Record alone and not in combination with any other data source or record. These family relationships may in fact conflict with those defined in other Information Record. The purpose here is to identify what the various Information Records tell you and then make an informed judgment on what a concluding set family groups should be based on the complete set of available information.

Source	Subject	Media	Events	Family	Tasks
Family / Parameters		Data Values			
▶ Family		Samuel W Davis, Jr. / Stella Lotovich			
▲ Family		Unknown / Frances Lotovich			
Remarks:					
Rationale:					
Informant:					
Evidence Assessm...					
Confidence Rating:		☆☆☆☆ - +			
▲ Family Members:		(3)			
▶ Frances Lotovi...		Parent			
▶ Stella Lotovich		Child			
▶ Charles Lotovich		Child			
<input type="button" value="Suggest Families"/> <input type="button" value="+ Add New Family"/>					

The family groups you extract are listed in the right-side panel under the Family tab.

The family relationships are in the form of parent or child roles. Thus a given Subject can be in more than one family group, as a parent in some, and child in others.

The rationale for the family's accuracy can be described, as well as the all important assessment of who the informant was and its assessment as evidence. The evidence assessment field is left as free text for the user to apply whatever system they choose to follow, such as identifying the source as original, derived, or authored, the information as primary or secondary, and the evidence as direct or indirect. See the list of [recommended references](#) regarding evidence analysis techniques. An additional [star-based confidence rating](#) field is also provided (supporting both positive and negative assessments).

Each family group has a list of members, with a set of data fields allowing you to document further notes, source details, and evidence assessments for each participant.

Confidence Rating:	☆☆☆☆	[-] [T]
Family Members:	(3)	
▶ Frances Lotovich	Parent	
▶ Stella Lotovich	Child	
▲ Charles Lotovich	Child	
Mother-Child Relationship:		
Father-Child Relationship:		
Remarks:		
Source Detail:		
Source Detail Comments:		
Source Detail Filing Ref:	Clooz pers. file #:	
Rationale:		
Informant:		
Evidence Assessment:		
Confidence Rating:	☆☆☆☆	[-] [T]

Adding Family Groups to an Information Record

There are several ways to add a family to an Information Record.

Automatic Family Generation

Click the *Suggest Families* button (or right click a family and choose that command from the context menu) to have Clooz generate a set of families when the Information Record details clearly define these. Census documents are rich sources for automatically defining families since they typically contain family relationship information.

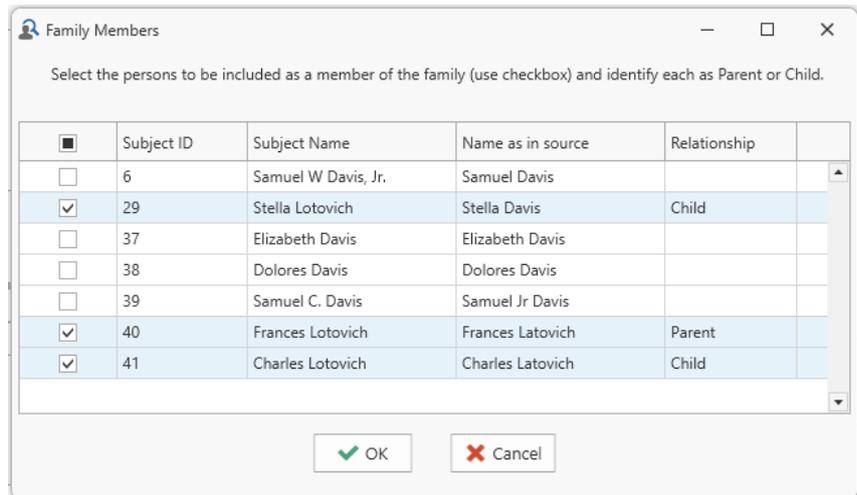


If there are already families for the Information Record, Clooz will ask if the new families should replace existing ones, or be added in addition to the existing ones.

Manually Add New Family

To define your own families, click the Add New Family button (or right click the grid and choose that command from the context menu). A blank family will be added to the list. You will then need to perform the following:

1. Select the persons to be included as a member of the family from the dialog window that pops up listing all of the



Information

Record's Subjects. Check the boxes for those to be included, and set the Relationship for each (Parent or Child).

2. Families must have at least two members. These can be 2 Parents, 2 Children (siblings), or any mix thereof.
3. Click OK when done.

Deleting Families from an Information Record

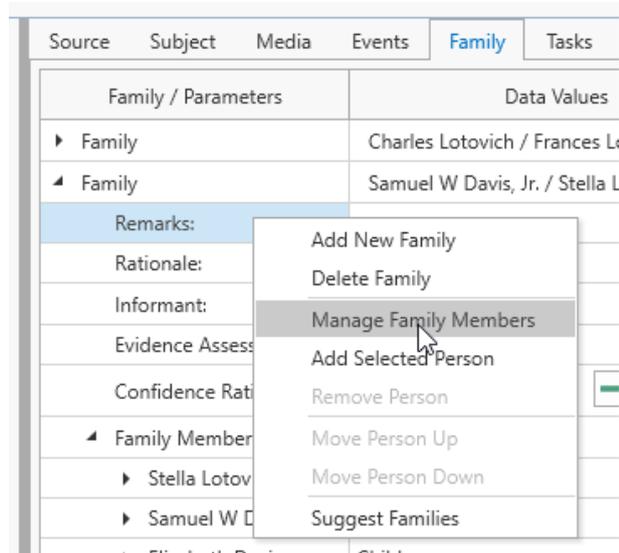
To delete a family, right-click on the family and select *Delete Family* from the context menu which pops up.

Managing Family Members

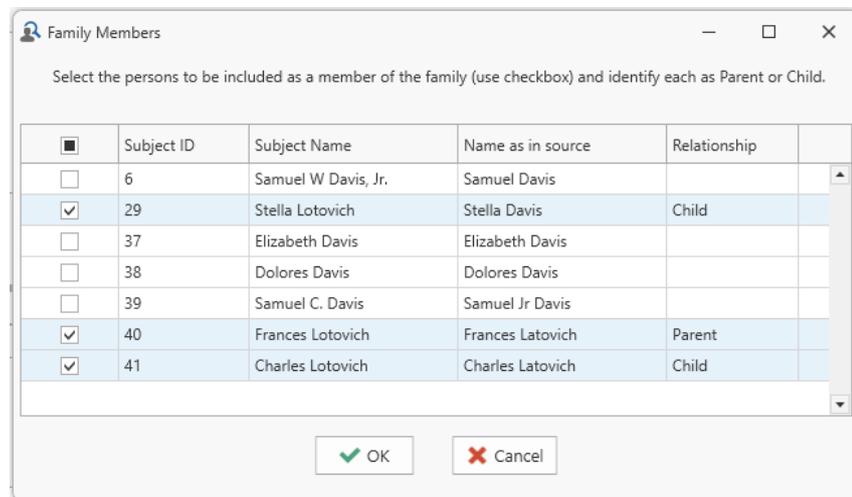
There are two methods for adding members to a family:

Manage Family Members Command

- Right-click the family (any row within the family) and select *Manage Family Members*.



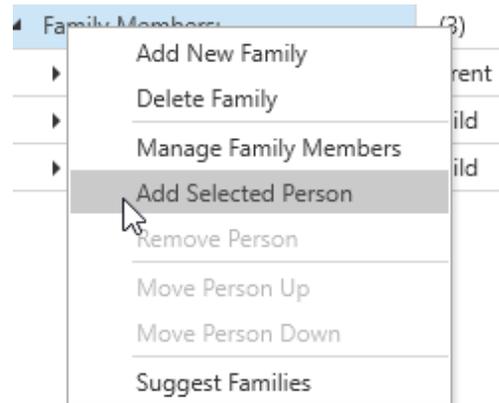
- A window will pop up listing the Subjects linked to the Information Record. Set the checkboxes for all of the Subjects that are to be members of the family. Clear the checkbox for any not to be included.



- Set the Parent or Child relationship for each.
- Click OK.
- Adjust the title of the family if required.

Add Selected Person Command

- Select a Subject in the Information Record's list of Subjects (or tabular grid).
- Right-click in the family, and click *Add Selected Person* (or whatever type the selected Subject is).
- Repeat as necessary for other family members.
- Once the names appear in the family panel, update their Parent / Child relationship (the field to the right of their name).
- Adjust the title of the family if required.



To remove a family member from the family, right-click the person and select *Remove Person* in the context menu.

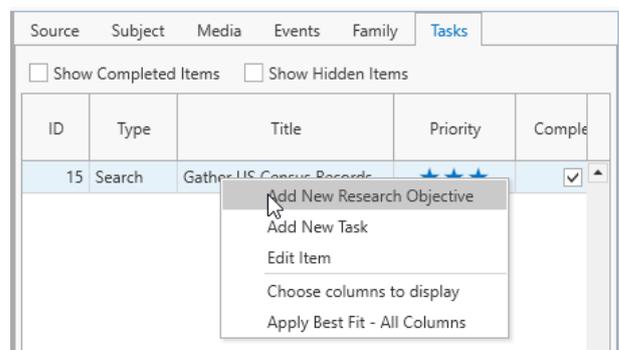
You can change the order of the family members by right-clicking the one you want to move and select *Move Up* or *Move Down* in the context menu.

Research Planning Connections

The Task tab in the right-side panel displays a list of the research tasks which this Information Record is linked to (usually because the Information Record was entered as a result of performing a search task).

The context menu which pops up if you right-click a task entry gives you several options:

- Add a new Research Objective
- Add a new Task
- Edit this Task



Any of those items will take you to the appropriate editor to enter or edit the record you requested.



If you displayed the Information Record editor while already in a Research Task editor, Clooz will let you know that the editor you are requesting is busy. Thus, these functions only work when the Information Record editor was initiated from the main screen.

Chapter 8

Editing Repository Records

Repository records are for facilities and online data providers which serve a data repositories. Such facilities are usually libraries, reading rooms, or museums, whether physical or cloud-based. Clooz handles web sites as either Sources or Repositories. You have your choice as to how to apply these, but recognize that over the past several decades some major online data repositories have emerged and sometimes totally replaced physical libraries. You will find that treating these as Repositories in Clooz (at least the larger data providers) will be the most efficient use of the Repository and Source record structures.

Repository records are edited in the Repository editor. Since all Repository records don't have different types, the editor layout is the same for all Repository records. The media viewer is optionally displayed at the top of the editor (as with other editor types).

Database: NewSample.ctz - Clooz by Ancestral Systems LLC

Repository Editor --- Family History Library

Repository ID: 5

Repository Name: Family History Library

Address (line 1): 35 North West Temple Street

Address (line 2):

City: Salt Lake City State / Province: Utah Postal Code: 84150

Country: USA

Phone (1): 1-801-240-6996 Phone (2): 800-453-3860 x22331

Email:

Home Page URL: <https://www.familysearch.org/en/family-history-library/>

Notes:

Media Tab: Family History Library, SLC, UT

Path: D:\My Documents\Clooz Data\Med ...

Title: Family History Library, SLC, UT

Tags:

Description:

Use system viewer

Auto-Open Media Item

Drop files here to link to this record

+ Select File + New Item

Save Repository Cancel

v4.0.0.149 - D:\My Documents\Clooz Data\NewSample... Primary External File: None designated

Editing: Repository

If a Home Page URL is entered, clicking the button to the right of that edit box will display the web page in your computer's default web browser.

The side-panel includes two tab pages, each similar to those already described for the Information Record editor:

- Media Tab - Digital media files linked to this Repository record. This will likely be less commonly used than with Information Records or Source records.
- Tasks Tab - Research Objectives having this repository as the default.

Chapter 9

Editing Source Records

Source records are where you identify where you found the information contained in an Information Record. These records are edited in the Source editor.

Clooz has nine different templates for recording this source information.

Type of Source	Examples
Book	Family histories, volume in a series, record compilations, etc. Any compilation of pages held as a unit. Could be published or unpublished, hard or soft bound, or notebook, physical copy or digital media.
Certificate	Usually a single page; Vital records (birth, death records issued by some authority), Baptismal or Confirmation certificates.
Journal	Periodicals, magazines.
Newspaper	Incl. newsletters.
Register	Tabular lists of information; Census, voting record lists, church book lists of baptisms, burials, etc.
Document	A single entity such as an essay, map, brochure, event program, etc.
Image	Photographs (physical or digital). Portraits, landscapes, buildings, etc. Not meant for images of other sources types.
Website	Web pages providing information. Large data providers can be listed as repositories and classify the item using one of the other source types.
Personal Communication	Letters, emails, phone calls, telegrams



Each classification is rather broad and in some cases overlapping with others. Use the one where the fields provided best align with the item you are describing.

Set the Repository from the list of existing repositories, or add a new one.



Choose the type of Source from the drop-down list. The remainder of the fields in the editor will change depending on which Source template is selected.

All of the Source templates include a source name and source title. The name is what will appear in lists of Sources in

Clooz, and can be whatever format the user desires. It is recommended that you

establish a consistent format to be followed, and one that will sort the way would want Sources to be listed. The title is the actual title of the source document.

Sources also have sections relating to published items and to unpublished items.

Published items are those that are available for distribution to the public, including anything obtained from online data providers (not requiring a visit to a library, such as Family History Centers).

If Published (Ex: Filmed or digitized items reproduced for sale, online digital copies)

CD Number or Film Series No.	<input type="text"/>	Roll or Part No.	<input type="text"/>
Publisher	Findmypast	Year	<input type="text"/>
City	<input type="text"/>	State/Province	<input type="text"/>
URL	<input type="text"/>		

Unpublished items have few copies and no general distribution. Microfilm copies or images only available for viewing in a library would be in this category.

If Unpublished (Ex: Private archived copies requiring visit to a library or holding facility.)

Call Number	<input type="text"/>	Item Number	<input type="text"/>
Credit Line	<input type="text"/>		



Facsimile images published online could be copies of either record originally published or unpublished. The same is true of unpublished copies of records. When dealing with these, it is safest to record both the information concerning the copy you viewed and the citation of the original source. This is easiest to do by declaring the online provider as the repository, and using the template based on the original source's type. The web site source template can be used for publishing original or derived content.



You might notice the Source templates do not include fields for details like locations, district numbers, page or line numbers. In Clooz, this type of information is entered as part of the Information Record, and further duplication of effort is avoided. It also allows Source records to be reapplied to multiple Information Records, each having different details but coming from that same source. A fully composed source citation requires merging data from the Repository, Source and Information Records.

The emphasis in Clooz (given its purpose for supporting research work efforts) is to capture all of the information required to build a proper source citation, as opposed to publishing particular formats of these citations. At the bottom of the editor is a Quick Capture area, where citation information that might be available on a web page can be cut and pasted here for later breakdown into the Source record fields.

The screenshot displays the Clooz software interface for editing a source record. The main window is titled "in the 1860 United States Federal Census" and has two tabs: "Detail" and "Source". The "Source" tab is active. The main editor contains the following text:

Source Citation
Year: 1860; Census Place: Hollidaysburg, Blair, Pennsylvania; Roll: M653_1078; Page: 296; Family History Library Film: 805078

Source Information
Ancestry.com. 1860 United States Federal Census [database on-line]. Provo, UT, USA: Ancestry.com Operations, Inc., 2009. Images reproduced by FamilySearch.

Original data: 1860 U.S. census, population schedule. NARA microfilm publication M653, 1,438 rolls. Washington, D.C.: National Archives and Records Administration, n.d.

On the right side of the editor, there is a vertical label "Pro and" and a circular icon with "RD".

At the bottom of the editor is a "Quick Capture" area with a "Remarks" field. A red arrow points from the "Quick Capture" area to the "Source Citation" field in the main editor.

ion

Chapter 10

Editing Subject Records

Subjects are the objects you are researching. These are usually people, however Clooz also supports other types of Subjects such as businesses, real estate/buildings, ships, and artifacts. You link Subjects to any Information records that contain information about them. Family structures and events involving a Subject can be created under each individual Information record (when the data supports it).



When entering Information Records, if you are unsure about the identity of a Subject (whether they are the same person as the person you are intending) it is best to create a new Subject record instead of linking to an existing one. At some later point in time when you have made a proper judgment about the two Subject records being the same person, you can merge the two Subjects into one.

The data in Subjects records are meant to be based on your best assessment of all the evidence contained in the Information Records they are linked to.

Subject Content:

- User definable fields (Alternate ID, User Field 1, User Field 2; Your own labels for User Field 1 and 2 can be set in the program Options.)
- Name fields (standardized form as desired by user)
- Subject type dependent fields

Person	Business	Real Estate / Building	Ship	Artifact
Birth Date	Business Type	Building Type	Type of Ship	Type of Artifact
Birth Location	Date Opened	Street address	Country of Registration	Maker
Marriage Date(s)	Opening Location	Former street name	Call Sign	Original Owner
Marriage Location	Date Closed	Latitude	Shipping Line/Owner	Current Owner
Death Date	Final Location	Longitude	Date - 1st Voyage	Owner Contact Info
Death Location	Owner's Name	Date Built	Date - Last Voyage	Date/Location Made
Sex		Date Destroyed		Date/Location Lost/Disposed
Still living?				Provenance



Keep in mind that artifacts (as Subjects) are something you are researching or tracking (provenance). For example, researching the history of a family heirloom. If an artifact (for example, a family Bible) is the source of some information you use, then it should be a Source. An artifact can be both a Source and a Subject.

The Subject Editor

The Subject editor is designed to support editing the Subject records and also serve as a jumping point to the Information Records they are linked to.

The screenshot shows the 'Subject Editor' window for Samuel Winfield Davies. The top panel contains various input fields for personal information, with a red arrow pointing to the 'Subject record fields' label. The middle panel is a table of information records with several tabs. The 'Linked Information Record data' tab is selected and bolded. The bottom panel shows a 'Details' tab with a table of event parameters and data values, with a red arrow pointing to the 'Details and Media match the selected item' label.

Event Date	Event Type	Location	Description	Name (as appeared)	Role	Principal?	Clooz ID (Info. Record)	Info. Year	Information Type	Conf. Ra
1861 and Jan 1862	Birth	Winfield, Schuylkill County, Pennsylvania		Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	4	1920	Census (US) [Populati...	
1 Jan 1920	Residence	Shamokin, Northumberland County, Penn...	Miner (Coal Mine)	Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	4	1920	Census (US) [Populati...	
1 Jan 1920	Occupation	Shamokin, Northumberland County, Penn...	Miner (Coal Mine)	Samuel W. Davies	Head	<input checked="" type="checkbox"/>	4	1920	Census (US) [Populati...	
1 Jan 1920	Census	Shamokin, Northumberland County, Penn...		Samuel W. Davies	Head	<input checked="" type="checkbox"/>	3	1900	Census (US) [Populati...	
Sep 1861	Birth	Pennsylvania		Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	3	1900	Census (US) [Populati...	
1 Jun 1900	Residence	Shenandoah, Schuylkill County, Pennsylv...		Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	3	1900	Census (US) [Populati...	
1 Jun 1900	Occupation	Shenandoah, Schuylkill County, Pennsylv...	Coal Miner	Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	3	1900	Census (US) [Populati...	
1 Jun 1900	Census	Shenandoah, Schuylkill County, Pennsylv...		Samuel W. Davies	Head	<input checked="" type="checkbox"/>	3	1900	Census (US) [Populati...	
1861 and Apr 18...	Birth	Pennsylvania		Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	5	1910	Census (US) [Populati...	
15 Apr 1910	Residence	Shamokin, Northumberland County, Penn...		Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	5	1910	Census (US) [Populati...	
15 Apr 1910	Occupation	Shamokin, Northumberland County, Penn...	Miner (Mines)	Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	5	1910	Census (US) [Populati...	
15 Apr 1910	Census	Shamokin, Northumberland County, Penn...		Samuel W. Davies	Head	<input checked="" type="checkbox"/>	5	1910	Census (US) [Populati...	
1890	Occupation	5th Ward, Shenandoah, Schuylkill County,...	Miner	Samuel W. Davies	Principal	<input checked="" type="checkbox"/>	14	1890	Directory [Population]	

The content of the Subject record can be edited in the top panel of the Subject editor. The bottom panel has tabs for each category of Information Records, including the Events and Family designations extracted from these Information Records. You can also see a list of the external data files this subject is linked to, and Research Objectives in which they have been designated as a target subject. When a category of Information Record has something listed, the tab label is shown in bold font.

When an item is selected in the Information Record data panel, the details associated with that event, family, or Information Record are shown in the Details tab in the right-side panel. The Media tab shows any media items linked to that same Information Record.

Double-click an item in the lower panel to open the Information Record editor with the Information Record the item is associated with.



Digital media items cannot be linked directly to Subject records. If there is an image (ex., portrait or other photograph) of the subject, setup an Information Record for the media item (photo, map, audio, or video) and link the Subject record to that Information Record.

Chapter 11

Planning Your Research

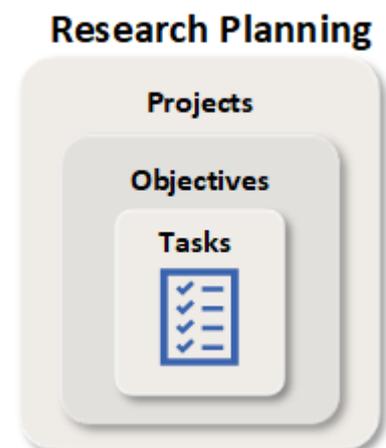
Developing and using research plans are an important part of family history research, keeping you focused on specific goals rather than haphazardly collecting data.

Research Plans help you to:

- Organize your previous knowledge and findings,
- Stay focused on evaluating the information you find, and
- Broaden the search for additional information.

Research plans generally consist of specific objectives you want to accomplish, documenting what you already know and what you are trying to prove (hypothesis). You then break those down into search tasks (identifying the repository or data source) designed to ensure you are looking at all available sources that might be applicable.

In Clooz, you can create an unlimited number of research plans as Research Projects. Each project can have an unlimited number of Research Objectives, and each objective can have an unlimited number of Research Tasks. Each of these entities has their own editor.





If you extensively use the research planning tools you may decide you don't want to have to wade through all of the actions that have already been completed, but don't want to delete them. Each of the research record types has a *Completed* check box (to mark as completed) and a *Hide* check box (think of this as an archive action). In lists of research items you will see a check box in the header to *Show Hidden Items*. Use this check box to control whether items you had hidden will be displayed or not.



There are specific benefits to using Research Objectives and Tasks in Clooz as you create Information Records, such as identifying a list of targeted Subjects to work with, or establishing default source citations. Refer to the help topics on the editors for these research items for a complete description.

Research Projects

Project records are research planning efforts you define which are comprised of multiple objectives and tasks to complete them. This can be focused on a family, family line(s), lineages, pedigrees or any other overall goal of your choosing.

Project record content:

- Title
- User defined identifier
- Status with flags for completed or hidden (archived)
- Priority rating
- User defined rating
- Purpose
- Description

Project Editor

The Project editor has two main areas, the top panel is where you edit the Project record, and the bottom panel displays a list of the Research Objectives entered for that Project.

The screenshot shows the Project Editor window for 'Samuel Winfield Davis Ancestry'. The top panel contains fields for Project ID (1), Alternate ID, Project Title, Project Status (Ongoing), Completed, Hide, Priority (4 stars), and User Rating (5 stars). It also has sections for Purpose, Description, and Comments. The bottom panel shows a table of Research Objectives with columns for Objective ID, Research Objective Title, Status Note, Completed, Priority, Objective, Conclusion, and Date Updated. Below the table are buttons for Print, Report, Add New Objective, Edit Objective, Save Project, and Cancel.

Objective ID	Research Objective Title	Status Note	Completed	Priority	Objective	Conclusion	Date Updated
1	Identify Parents & Siblings of Sam...	Found	<input checked="" type="checkbox"/>		Identify the parents and siblings o...	Parents were John Davis and Sara...	29 Jul 2022
2	Determine immigration timeframe...	Partially. Found Sar...	<input type="checkbox"/>		Determine when Samuel's family c...	Sarah & children came separately...	29 Jul 2022
3	Gather information on Davis Child...	Ongoing	<input type="checkbox"/>		Determine more precise birth info...		29 Jul 2022
4	Find marriage information regardi...		<input type="checkbox"/>		Gather marriage information rega...		29 Jul 2022

In the header for the Research Objectives you can indicate whether hidden (archived) objectives should be displayed or not.

Double-click a Research Objective to open that record in the Research Objective editor, or right-click the grid and choose an action from the context menu that appears.

This close-up shows the 'Objectives' header with a 'Show Hidden Items' checkbox. The table has columns for Research Objective Title, Status Note, Completed, and Priority. A context menu is open over the second row, showing options: Add New Research Objective, Edit Research Objective, Delete Research Objective, Choose columns to display, and Apply Best Fit - All Columns.

You have control over which columns should be visible in the grid using the *Choose columns to display* command in the context menu (right-click menu).

Research Objectives

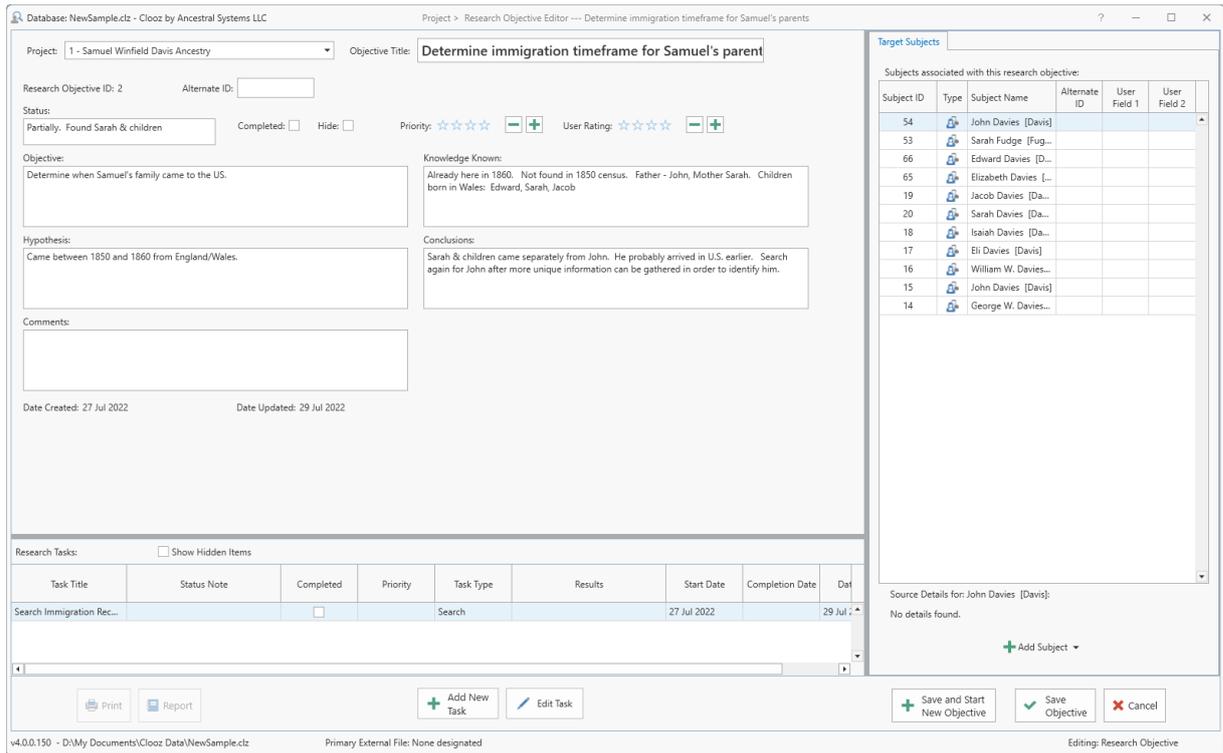
Research objectives are descriptions of what you are trying to accomplish as part of an overall research planning project. An objective is recommended to be a question to be answered or some other goal for which you can determine has been answered or completed. Each objective include any number of tasks detailing the activities you need to perform to complete the objective.

Research Objective content:

- Title
- User defined identifier
- Status with flags for completed and hidden (archived)
- Priority rating
- User defined rating
- Objective statement
- Knowledge known
- Hypothesis
- Conclusions
- Links to Subjects associated with this objective

Research Objective Editor

The Research Objective editor is where you construct and edit objectives of your research. Generally an objective is a specific question you are trying to answer. It is best practice to define objectives such that it can be met by a certain set of information. Open ended objectives (ex., find all there is to know about Joe) are not helpful.



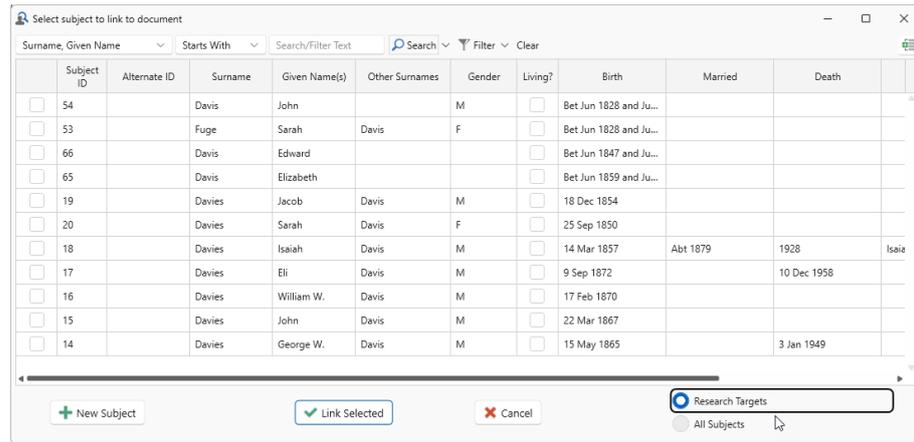
Defining Research Tasks for the Objective

All Research Tasks (usually searches) associated with this objective are listed in the bottom section of the editor. You can create new tasks or open the Research Task editor using the buttons or context menu (by right-clicking) in this area. The *Show Hidden Items* check box in the header of this section controls whether hidden (archived) objectives are displayed or not in the list.

Targeting Subjects

A feature of Research Objectives is the ability to designate existing Subjects in Clooz as targets of the objective. These appear in the right-side panel of the editor. If the objective was to find the parents of some existing Subject (or group of sibling Subjects), then those Subjects could be setup as targets.

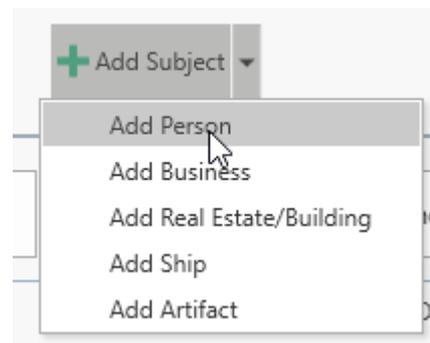
The benefit of designating targeted Subjects becomes apparent when you find an information source and are creating the Information Record. Clicking the Information Record editor's Link button will show a list of existing Subjects to choose from, but with the additional choice of showing only the targeted ones or the full list of all Subjects.



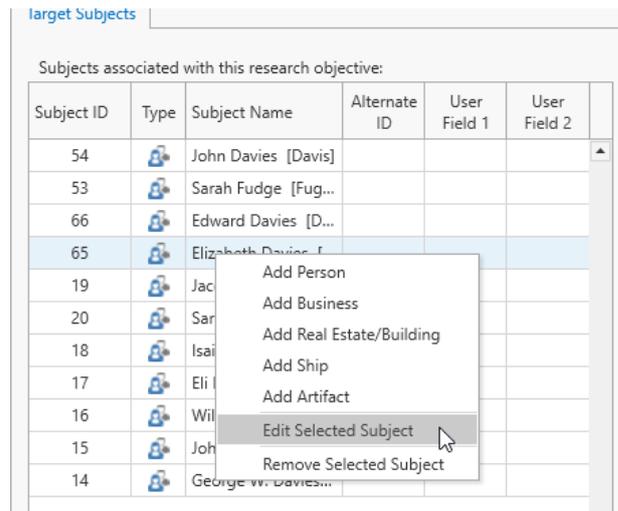
Subject ID	Alternate ID	Surname	Given Name(s)	Other Surnames	Gender	Living?	Birth	Married	Death
<input type="checkbox"/>	54	Davis	John		M	<input type="checkbox"/>	Bet Jun 1828 and Ju...		
<input type="checkbox"/>	53	Fuge	Sarah	Davis	F	<input type="checkbox"/>	Bet Jun 1828 and Ju...		
<input type="checkbox"/>	66	Davis	Edward			<input type="checkbox"/>	Bet Jun 1847 and Ju...		
<input type="checkbox"/>	65	Davis	Elizabeth			<input type="checkbox"/>	Bet Jun 1859 and Ju...		
<input type="checkbox"/>	19	Davies	Jacob	Davis	M	<input type="checkbox"/>	18 Dec 1854		
<input type="checkbox"/>	20	Davies	Sarah	Davis	F	<input type="checkbox"/>	25 Sep 1850		
<input type="checkbox"/>	18	Davies	Isaiah	Davis	M	<input type="checkbox"/>	14 Mar 1857	Abt 1879	1928
<input type="checkbox"/>	17	Davies	Eli	Davis	M	<input type="checkbox"/>	9 Sep 1872		10 Dec 1958
<input type="checkbox"/>	16	Davies	William W.	Davis	M	<input type="checkbox"/>	17 Feb 1870		
<input type="checkbox"/>	15	Davies	John	Davis	M	<input type="checkbox"/>	22 Mar 1867		
<input type="checkbox"/>	14	Davies	George W.	Davis	M	<input type="checkbox"/>	15 May 1865		3 Jan 1949

Adding or Removing Subjects as Targets

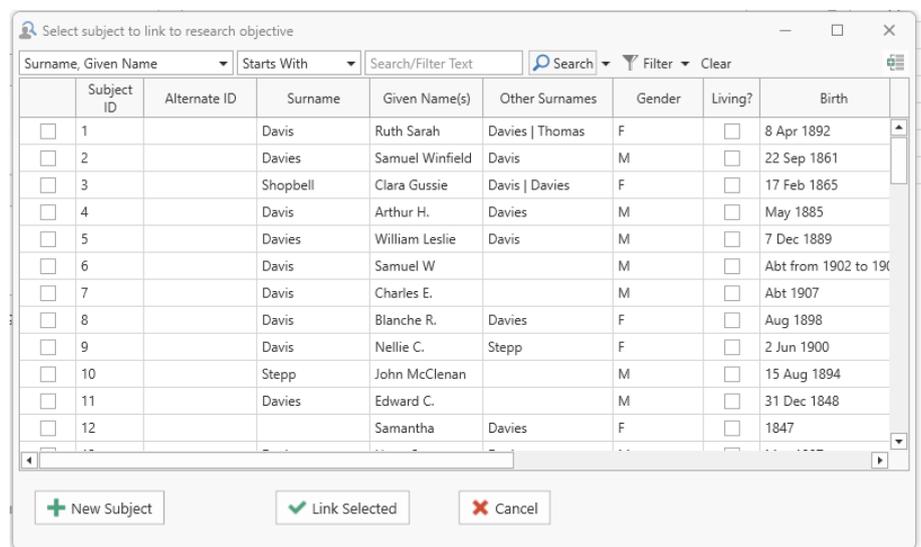
Click the Add Subject button to add a person as a target, or click the down arrow to select a different type of Subject to target.



Right-click a Subject in the list of targets to display the context menu. You can then choose to add a Subject, edit the Subject, or Remove the Subject from the list.



When you add a Subject, the Subject selection dialog will appear. Note that you can then choose one or more existing Subjects to link to the objective (click check boxes then Link Selected



button; or double-click a single Subject), or create a new Subject record entirely (click the New Subject button).

Research Tasks

Tasks are activities you need to perform while completing an objective. These are usually searches, analysis or administrative actions. You can define repositories or known sources to be searched. Resulting Information Records generated by the search can be linked to these tasks as search results.

Chapter 11

Task record content:

- Title
- User defined identifier
- Type of task (search, analysis, or other)
- Start and Completion dates
- Status with flags for completed and hidden (archived)
- Priority rating
- User defined rating
- Search Parameters
- Task Description
- Results Description
- Default Source (for Information Records generated under this task)

Research Task Editor

The screenshot displays the 'Task Editor - Search Immigration Records' window. The interface includes a header with the database name and task title. Below this, there are fields for Project, Objective, Task ID, Alternate ID, Task Type, Start Date, and Completion Date. A status section contains checkboxes for 'Completed' and 'Hidden', along with priority and user rating indicators. The 'Search Parameters' section has a text input field. The 'Task Description' and 'Results' sections contain text boxes. A table titled 'Information Records Found:' is visible, with one record shown. A red text box at the bottom of the table area reads 'Information Records linked to this Task'. On the right side, there is a panel for 'Default Source and Repository for information records under this task', which includes fields for Repository, Source Type, Source ID, Location, Source Name, Source Title, Source Creator, Item Number, File Number, Collection No., Cost, and File or Collection. At the bottom of the window, there are buttons for 'Print', 'Report', 'New Information Record', 'Link Existing Record', 'Edit Information Record', 'Save and Start New Task', 'Save Task', and 'Cancel'. The status bar at the very bottom shows the version number 'v4.0.0.145' and the file path 'D:\My Documents\Clooz 4 Data\NewSample.c1z'.

Info Record ID	Personal File ID	User Rating	Document Type	Event Type	Year	Country	State/Province	County	Parish/Town
21			Passenger List, Early (...)	Travel	1856				

Default Source and Repository

In the right-side panel of the Research Task editor you can select a Source and/or Repository to become the default for any new Information Records created under this task. When a new Information Record is created, the Source and Repository fields in the Information Record will be filled with this data.

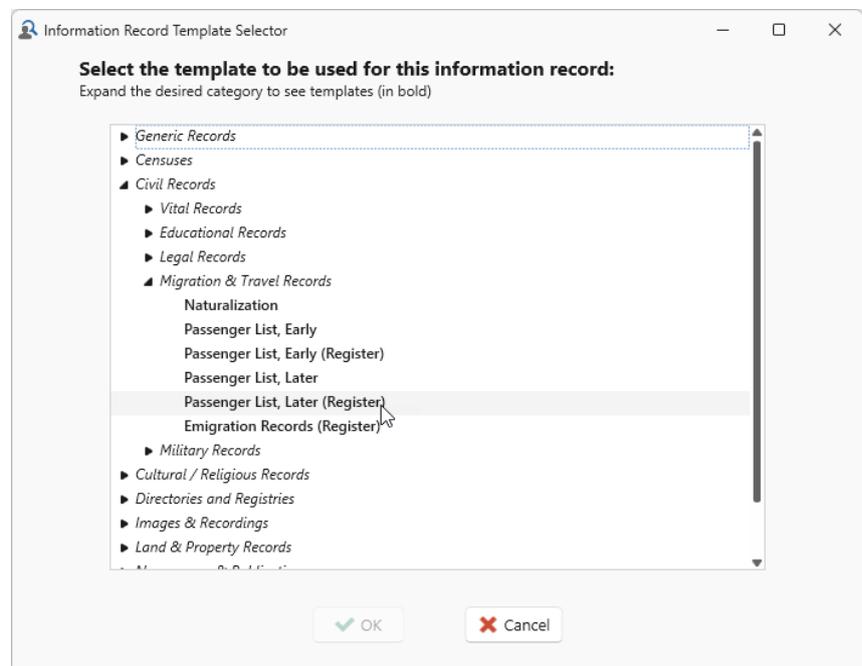


Any changes or selection of a different Source while editing the Information Record will take precedence over the default selection made in the Research Task.

Adding Information Records

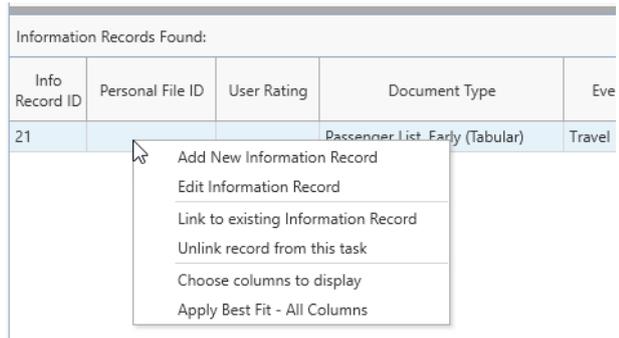
Click the New Information Record button to create a new Information Record from within the Research Task editor. The following steps will occur:

1. A list of Information Record templates will appear for you to select which is to be used with the record you are creating.
2. The Information Record editor will appear using the template you suggest.



3. Enter the document information and subject details, then close the Information Record editor.
4. The display will return to the Research Task editor.

Right-click an item in the bottom panel to manage the list of Information Records in this editor.



The screenshot shows a table titled "Information Records Found:" with the following columns: Info Record ID, Personal File ID, User Rating, Document Type, and Event. A row is highlighted with a blue background, containing the value "21" in the Info Record ID column, "Passenger List Early (Tabular)" in the Document Type column, and "Travel" in the Event column. A context menu is open over this row, listing the following options: Add New Information Record, Edit Information Record, Link to existing Information Record, Unlink record from this task, Choose columns to display, and Apply Best Fit - All Columns.

Info Record ID	Personal File ID	User Rating	Document Type	Event
21			Passenger List Early (Tabular)	Travel

- Add New Information Record
- Edit Information Record
- Link to existing Information Record
- Unlink record from this task
- Choose columns to display
- Apply Best Fit - All Columns

Chapter 12

Exchanging Data with Other Genealogy Programs

Clooz is able to import and export people, events, media file references, sources, and repositories with other genealogy programs you may be using. The capabilities and transfer methods vary somewhat with each program depending upon how much direct access their developers have permitted Clooz to use. Clooz directly reads several types of files, allowing Clooz to obtain internal identifiers for records. In a few cases, Clooz is allowed to write data directly into the external files resulting in fewer steps the user need take. In all other cases, the data transfer needs to be done using GEDCOM files. Clooz uses special identifiers whenever possible to allow the external program to recognize a person being imported as the same as one already in its database. Because of the use of these internal identifiers, Clooz is able to maintain linkage to people records in the specific programs listed below. Using generic or FamilyTreeMaker's format of GEDCOM files allow you to transfer data, but don't provide a solid basis for maintaining a persistent linkage. If you don't see your favorite program listed, contact the developers of your program and ask they allow Clooz to interface with them.

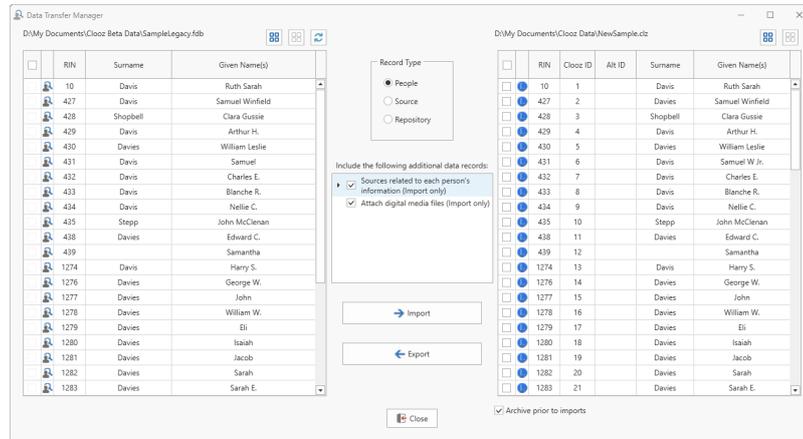
External Program	Import Method	Export Method
Clooz (another database)	Direct Read	Not Available
Legacy Family Tree	Direct Read	Direct Write
Family Historian	Direct Read	Direct Write
RootsMagic	Direct Read	Via GEDCOM*
Ancestral Quest	Direct Read	Via GEDCOM*
All others	Via GEDCOM	Via GEDCOM

* Special GEDCOM including identifiers to help avoid record duplication.

There are two features in Clooz supporting data exchange with other programs:

- Data Transfer Manager

- Used for all imports (people, sources, and

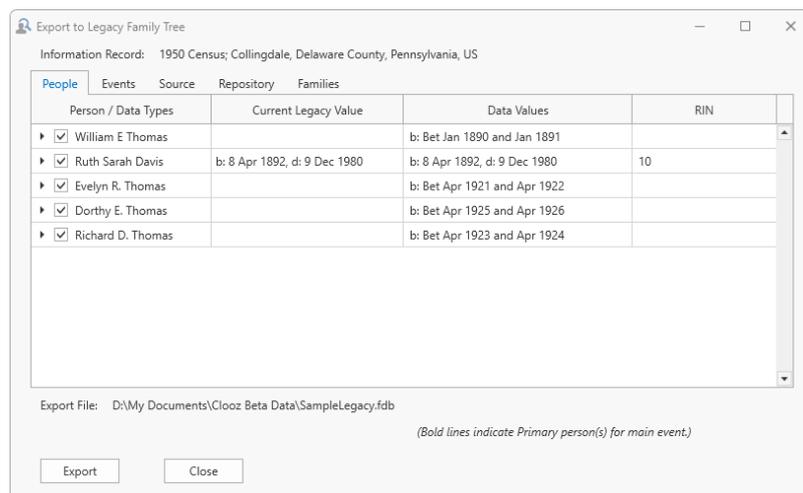


repositories). Events (other than the person's birth, marriage, death) and family positioning are not supported by this method. Options are provided to import sources related to a person and establishing research planning tasks to review each and extract additional information in Clooz.

- Exports one or more people, sources, or repositories (with associated media). Events (other than the vital events in the Subject record) and family positioning are not supported by this method (instead use the Record Exporter).
- Access the Data Transfer Manager from the External File Links screen on the Home tab page. See Connecting with External Files.

- Record Exporter

- Exporting an Information Record will allow you to export all the people in the



record, their events, attached media, and source citations (including repository).

- Access the Record Exporter by selecting *Export Item* from the context menu displayed by right-clicking a Subject, Information Record, Source or Repository on the main screen.

Each of these has differing capabilities as noted above. Choose the one that best meets your transfer objective. The Data Transfer Manager is better for bulk transfers or for copying people (the only type of Subject generally supported by other programs). The Record Exporter makes better use of Information Record data, including all of its associated events and family relationships. The table below offers recommendations for typical objectives.

Objective	Recommended Method
Use Clooz to more thoroughly review evidence found for specific people in your family tree.	Import people from your family tree program using the Data Transfer Manager, with options selected to include supporting sources and generation of research plan to track the review of the imported sources.
Use Clooz as the basis for a complete family tree "redo."	You might import sources from your family tree program using the Data Transfer Manager, with options selected to include repositories and media. You may include the people and generation of research plans. A more thorough "redo" though would be to start with a blank Clooz file and enter in all of the information you can find, creating new people as you identify them.
Quickly establish links between people in Clooz and those in the external file.	Import people using the Data Transfer Manager.
Setup an index of all the documents, pictures, maps, etc. I have found while building my family tree.	Import sources using the Data Transfer Manager, with option to include related people. Extract Information Records (events and family definition or detail transcription is not necessary if an index is the end goal). Add Information Records for all items you have in your files not already in Clooz.
Add events I have identified for a person in Clooz to that same person in my family tree program.	Export Information Records for that person using the Record Exporter. Ensure the record identifier (or RIN) for each Subject (person) is appearing, indicating Clooz already has them linked. Otherwise, determine the value from your external program and enter it in the field. Select the events and other details that you want to be included. If transfer is via GEDCOM, ensure you import it into your external program and use its tools to avoid any duplication of records.
Add people in Clooz as new people in my family tree program.	Export Information Records for that person using the Record Exporter. The record identifier (or RIN) field is likely blank (indicating Clooz does not have this person linked to a person in your external file). Use the Families tab of the Record Exporter to review how this new person might be added to an

Objective	Recommended Method
	existing family, or how a new family will be setup in your family tree.



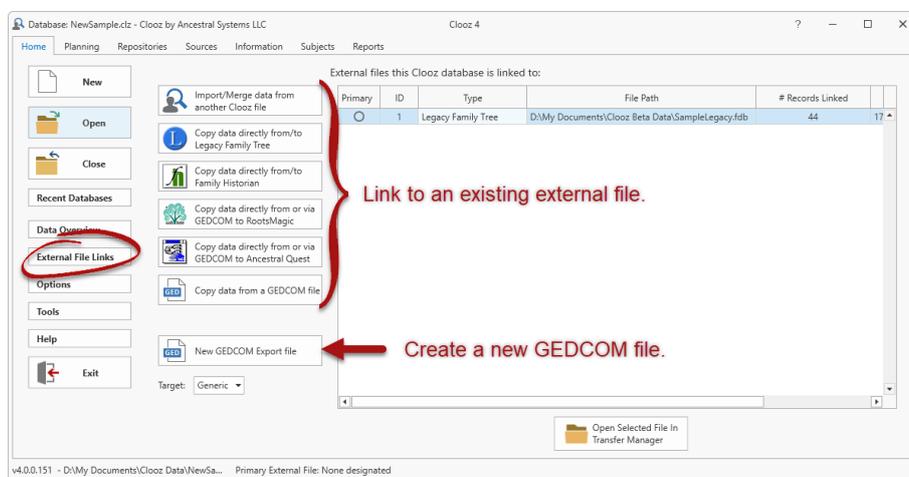
The most efficient use of Clooz is as a research tool while first gathering evidence to expand your family tree or historical details (as opposed to retrospective analysis of past research efforts). Collect and analyze the information you find in Clooz first, and then export the evidence-supported data to your family tree.

Connecting with External Files

You need to establish a connection link to an external file before any exchange of data can occur. This is done using the *External File Links* function on the *Home* tab page.

To setup a new external file link, do the following:

1. If the Home tab page is not already displayed, click the Home tab.

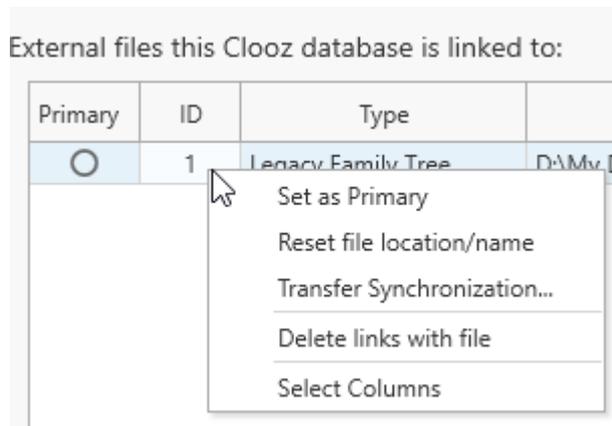


2. Click the *External File Links* button to display the external files screen.
3. Click the button for the type of external file you want to connect to. The external file must already exist, unless you are creating a new GEDCOM file

for exporting. When creating a new GEDCOM file, you can direct Clooz to use generic (standard) GEDCOM structure, or use non-standard structure for compatibility with certain programs, such as Family Tree Maker. After clicking one of these buttons a file selection dialog will appear for you to locate the desired file on your computer.

4. The file selected will now be added to the list of external files this Clooz database is linked to and the Data Transfer Manager will be opened. (Click on Close if you don't intend to use the Data Transfer Manager at that point, or continue to perform the transfers you desire.)

The context menu (displayed by right-clicking one of the external files in the list) contains a number of additional functions:



- **Set the file as Primary.** Clooz can only display identifier values on the main screen for one external file (since other external files will likely have different identifiers). This is called the "Primary" external file. To designate the Primary file, right click a file to display the context menu and then select "Set as Primary" or click the circle button in the Primary column on the list of external files. The current Primary file will appear in bold-faced font, with the circle on the button filled in.

Primary	ID	Type
<input checked="" type="radio"/>	1	Legacy Family Tree

- **Reset the file location or name of the external file.** Use this command when you have moved or renamed the external file. This allows you to retain any existing record synchronization, which would otherwise be lost if you deleted the file link and then connected it again as a new link. After clicking this item, a dialog window will appear for you to enter the new file path. Click the button to the right of the edit field to browse to the new location on your computer.

- **Transfer Synchronized Links.** Use this tool to have Clooz link with an external database (Legacy Family Tree, Family Historian, RootsMagic, Ancestral Quest) based on the links in the file you selected (reference file).

Synchronization Transfer Tool

Use this tool to have Clooz link with an external database (Legacy, Family Historian, RootsMagic, Ancestral Quest) based on the links in the file you selected (reference file). **Backup your files first!**

This tool can be used when you have been working with one external database (ex., a RootsMagic file), and have now migrated the data to another external file (ex., Legacy), preserving the RIN values. Now you wish to have Clooz link with the same records in the new file it had previously linked to in the original file.

If Clooz is already linked to a record in the new file, or if the person's name in the new file record does not exactly match the reference file, the synchronization is skipped for that record.

IMPORTANT:
The new file **MUST** contain the same identification numbers (eg., RIN) as used for the matching people in the original file.

Identification fields to be used to match records between the old and new files

Reference File field: Record ID Number (RIN) [v]

Field in target file: Record ID Number (RIN) [v]

(Sources and repositories matched by record numbers only.)

Apply to:

- People
- Sources
- Repositories

Reference File: D:\My Documents\Clooz Beta Data\SampleLegacy.fdb

File to Synchronize: Select file to add links to.

Select File Cancel

For instance, if you have exported your family tree from Legacy and imported it into RootsMagic and have been careful to preserve the same record identifiers for each person, you can have Clooz setup the same record links to the RootsMagic file as were set to the Legacy file. For a more complete explanation of how Clooz uses various identifiers when synchronizing records with their external file counterparts, see the [External Data Identifiers](#) topic.

- **Delete all links to an external file.** Right click on the selected item(s) to display the context menu and select the *Delete links with file* item to delete all record links and the file link Clooz has with the selected external file.

Synchronization with External Record Identifiers

There are a number of record identifiers that are in common use among all of the genealogy programs which establish a basis for Clooz linking, or what will be called Synchronizing, its records to matching records in external programs. While these mainly apply to person records, similar identifiers sometimes are used with marriage, source or even repository records. The main focus here will be on person records.

Identifier types recognized by Clooz:

- **Record Identification Number (RIN; ID)** These are assigned by the external program, which may or may not allow users to modify or renumber records. This is the value an external program would display for individual records (although some programs do not display the value to the user; eg., FTM). RIN values in one program are entirely independent of those in other programs, or even other databases generated by the same program.
- **User ID or Reference No** These are arbitrary identification fields containing content defined by the user. These are strictly for the use of and interpretation by the user.
- **Ancestral File Number (AFN)** These identifiers are for records in an obsolete feature of FamilySearch. It is still retained in Clooz since some users may be tracking person records based on this value. Most external programs do not do anything specific with these numbers except to perhaps display it (usually in editable form).

- FamilySearch Family Tree Identifier (FSFTID) Person records in the FamilySearch Family Tree are assigned these unique identifiers. Note that if a given person's identity is duplicated in FamilySearch, there will be multiple identifiers generated for that person. Nevertheless, the objective is to have one FSFTID per person, and be universally identical across all programs interfacing with FamilySearch. Clooz does not interface with FamilySearch Family Tree. FSFTID values are only recorded when data are imported from external programs that do provide such interfaces. These values are only retained to assist the user in identifying external persons.
- Universally Unique Identifiers (UUID) These software-generated values are meant to be a unique identifier useable across all programs to identify a specific person. These identifiers are in the form of GEDCOM Universally Unique Identifiers (UUID). For a complete explanation of UUIDs, see [The _UID tag \(tamurajones.net\)](http://tamurajones.net). Within the Microsoft development world, these are called Globally Unique Identifier (GUID). The standard for UUID creation is described here: [Information on RFC 4122 » RFC Editor \(rfc-editor.org\)](http://rfc-editor.org). Not all external programs use or support such values. They are usually used to assist in merging of imported data records. Since records for a specific person can be initiated in any number of programs, any number of these UUIDs can end up being assigned to a specific person across all the datasets. Internally, Clooz retains a list of all the UUIDs for a person in the Clooz database it becomes aware of. These values are used to assist in the identification of persons in an external file with those in Clooz.

GEDCOM Tags Associated with Identifier Types

ID Type	GEDCOM 5.5 / 5.5.1	GEDCOM 7.0
RIN	RIN	EXID/ TYPE RIN
AFN	AFN	EXID/ TYPE AFN
User ID / Reference No.	REFN	REFN
FSFTID	_FSFTID (unofficial; custom)	EXID/ TYPE FSFTID ???
UUID	_UID (unofficial; custom)	UID

Linking Clooz Records with External Records

Clooz allows you to link the following record types to records in an external file:

- Subject (person only)
- Source
- Repository

Records that have been linked will appear in the Data Transfer Manager with icons representing the type of file they are linked to. These icons are miniature versions of the respective program icons (Legacy, RootsMagic, Family Historian, etc.).

To link a Clooz record to an external one, do one of the following:

- While in the Data Transfer Manager:
 - Display the Details Comparison window and select the Link button,
 - Click in the RIN or ID column cell of the Clooz record's row on the grid on the right side of the Data Transfer Manager (Clooz list) to place the cell in edit mode, then enter (or clear) the ID number of the record as shown in the external file list, or
 - Import an external record or export a Clooz record (automatically establishes a link),
- While using the Record Export function:
 - Edit the external record ID value,
 - Export the record

To unlink a Clooz record from an external one, do one of the following:

- While in the Data Transfer Manager:
 - Display the Details Comparison window for the linked people and select the Unlink button, or

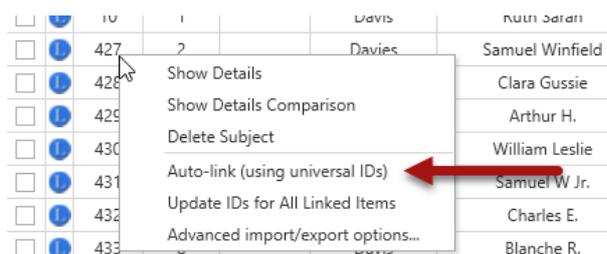
- Click in the RIN or ID column cell of the Clooz record's row on the Clooz list (grid on the right side of the Data Transfer Manager) to place the cell in edit mode, then clear the ID number.
- While viewing the External File Links screen:
 - Right-click an external file to delete ALL links with that file (if you are desiring to remove all of the links)

Automatic Linking using Universal IDs

Many external file types support ID values known as Universally Unique Identifiers (UUIDs). When you export/import data (outside of Clooz) from one external program to another, or even from one database to another using the same external program, these UUIDs may get carried along into the new program's data (varies depending on the programs involved). Each time Clooz establishes a link to an external record it adds any available UUIDs to a list maintained in Clooz for that Clooz record.

These UUIDs are maintained even regardless of what external file is being worked with in the Data Transfer Manager. An *Auto-link* function is provided in Clooz to scan the external data for matching UUIDs and when a match is found it automatically links the Clooz record to that external record.

To automatically link all records having matching universal IDs, open the Data Transfer Manager for the desired external file and right click anywhere on the Clooz record list to display the context menu. Then select the *Auto-link* menu item.

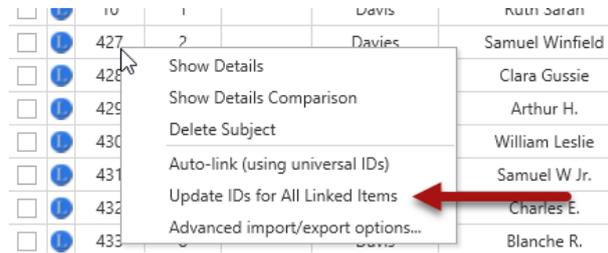


Updating ID Values for All Linked Records

There are times when one of the various ID values (other than the RIN or record ID) are modified within the external file. Clooz provides a function to check all of these

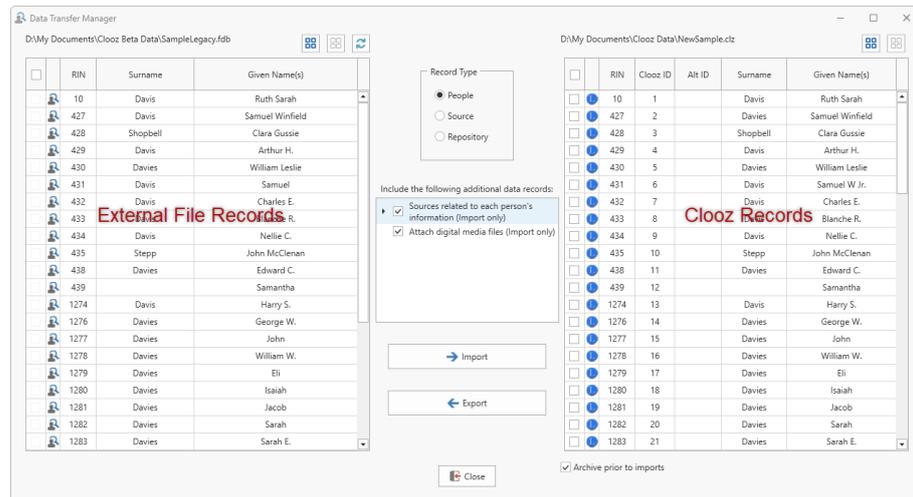
values and update the value retained in Clooz.

To perform this update, open the Data Transfer Manager for the desired external file and right click anywhere on the Clooz record list to display the context menu. Then select the *Update IDs* menu item.



Data Transfer Manager

The Data Transfer Manager is a powerful tool in Clooz to import data from external files (including other Clooz databases), or export data for use in other programs.



To open the Data Transfer Manager, do one of the following from the *External File Links* screen:

- Setup a new external file link,
- Double-click a file listed, or
- Select a file in the list and click the *Open Selected File in Transfer Manager* button at the bottom of the screen.



If the file being opened is a Family Historian project, you will be requested to perform a Save in the Family Historian program if the file is currently in use. This is because Family Historian retains data changes in memory until saved, and you need Clooz to be using the most recent set of data in that project.

The Data Transfer Manager window will now appear, showing three sections:

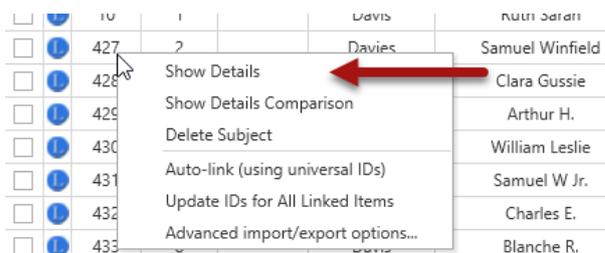
- Left section: Records from the external file of the type selected in the middle column.
- Middle section: Controls for importing and exporting data.
- Right section: Records of the type selected from this Clooz database.

The grids showing the record lists have several columns:

- Checkbox indicating the record is selected for import or export. No checkbox appears if the record is already linked.
- Icons appear in the 2nd column if the record is already linked.
- ID and name columns.

Showing Record Details

To display a window showing additional details associated with a record, display the context menu for that record (right-click the row) and select *Show Details*.



The top half of the Detailed Summary window is other data from the record, and the bottom half are other types of information that is associated with the selected record (in hierarchical format).

Detailed Summary
— □ ×

Details for: Samuel Winfield Davies

Data Type	Content
Birth	22 Sep 1861, Winfield, Schuylkill County, Pennsylvania
Marriage	Abt 1884
Death	24 Feb 1923, Shamokin, Northumberland County, Pennsylvania, U.S.
Other Surnames	Davis
Last Updated	29 Jul 2022

Information records associated with this subject:

Record Type	Summary of Data
▶ Information Record	1870 Census (US) [Population Sched.]
▶ Information Record	1880 Census (US) [Population Sched.]
◀ Information Record	1884 Correspondence
Birth	22 Sep 1861
Family	John Davis / Sarah Fuge, Child
▶ Information Record	1890 Directory [Population]; [Residence]

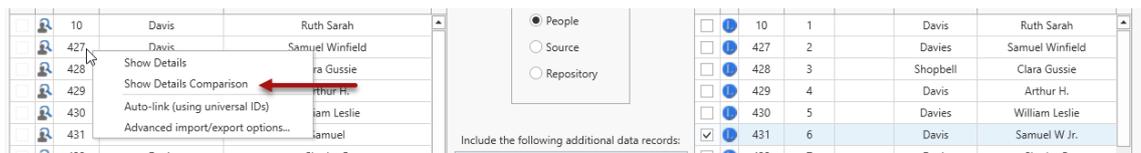
Close

Comparing Clooz and External Records

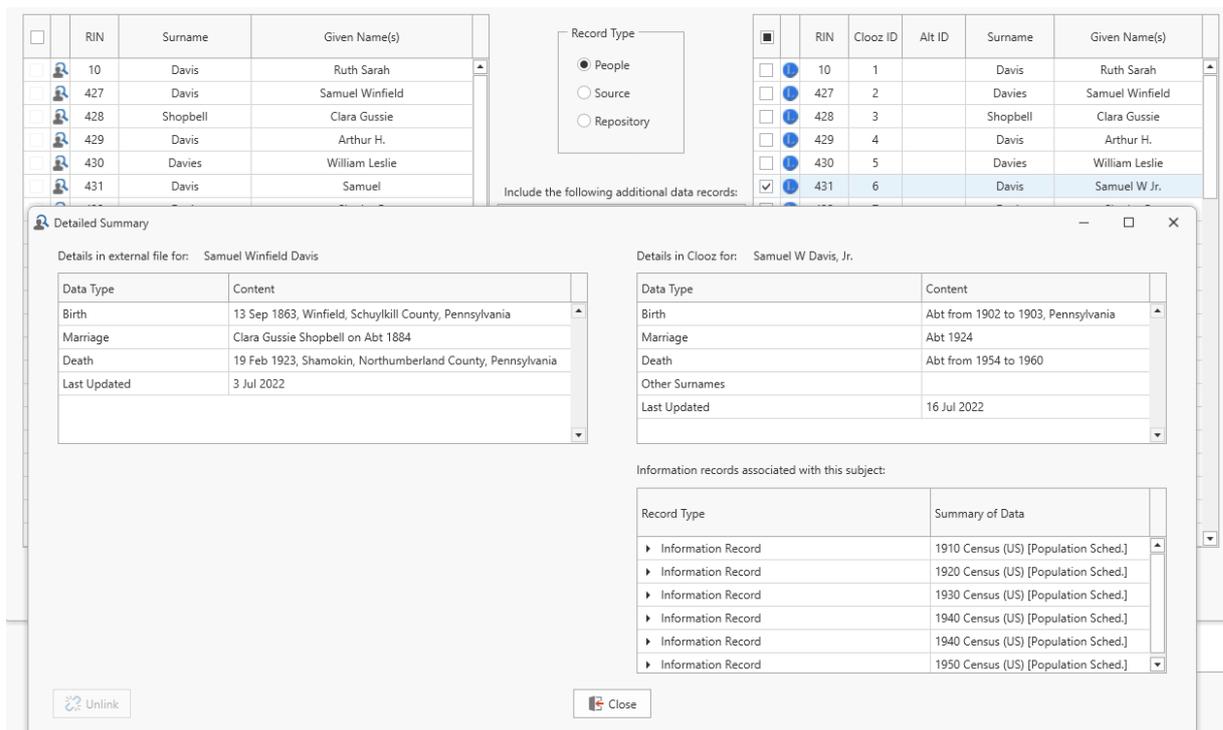
To compare the details associated with an external record with those for a record in Clooz, follow these steps:

1. Select the records to compare (one record on both the external and Clooz lists needs to be selected for the comparison).
 - If the records are already linked, selecting a record on either list (external or Clooz) will compare the linked records if no record in the other list has been selected.

- If the records are not linked (or at least not linked to each other), select the first record from either the external (left) or Clooz (right) list.
2. Right-click the record on the other list (the one not selected in the first step) to display the context menu. If the record is already linked, any selection in the other list will be the record compared to regardless of which record is linked to it.



3. Select Show Details Comparison to display the comparison window.



You can click the button in the lower left corner of the comparison window to Link the two records (or Unlink if the two records are currently linked). In the example

shown above, the button is disabled because each of the records are already linked to other records. A record in Clooz can only be linked to one record in the external file.

Importing Data from External Files

External Files other than Clooz Databases

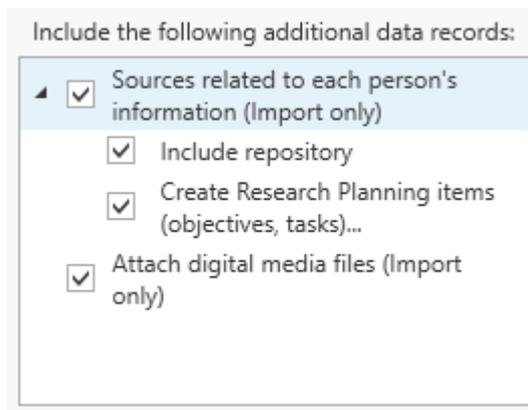
Follow these steps in the Data Transfer Manager to import records from an external file:

1. Select the record type to be imported. The lists of external records on the left side and Clooz records on the right side of the Data Transfer Manager will refresh to show all records of the type you select.

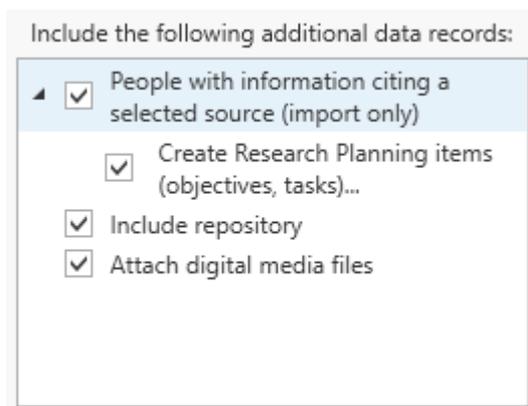


2. Adjust the options for including additional data records. The options vary depending upon the type of record you selected to import.

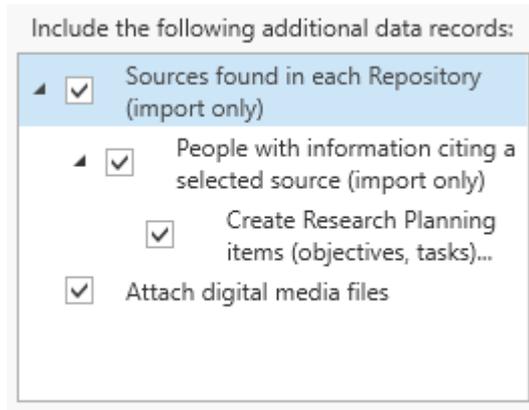
- People selected for import



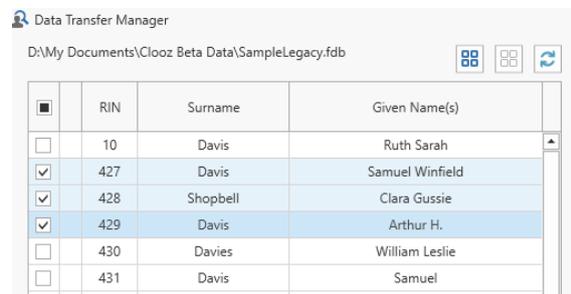
- Sources selected for import



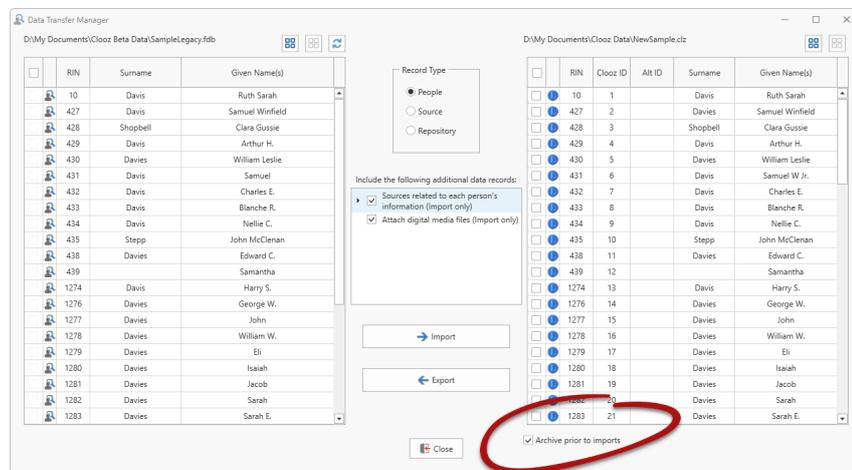
- Repositories selected for import



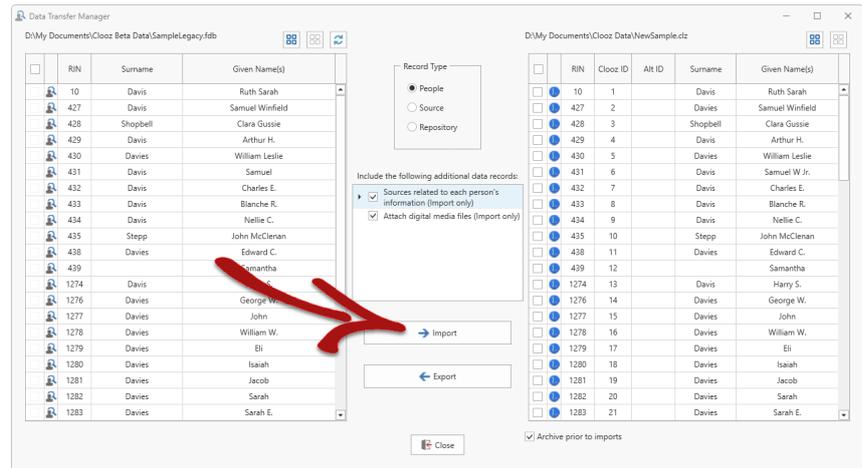
3. Select the records from the external records list by clicking the checkboxes, or click the buttons shown on the upper right to select all records or clear all record selections.



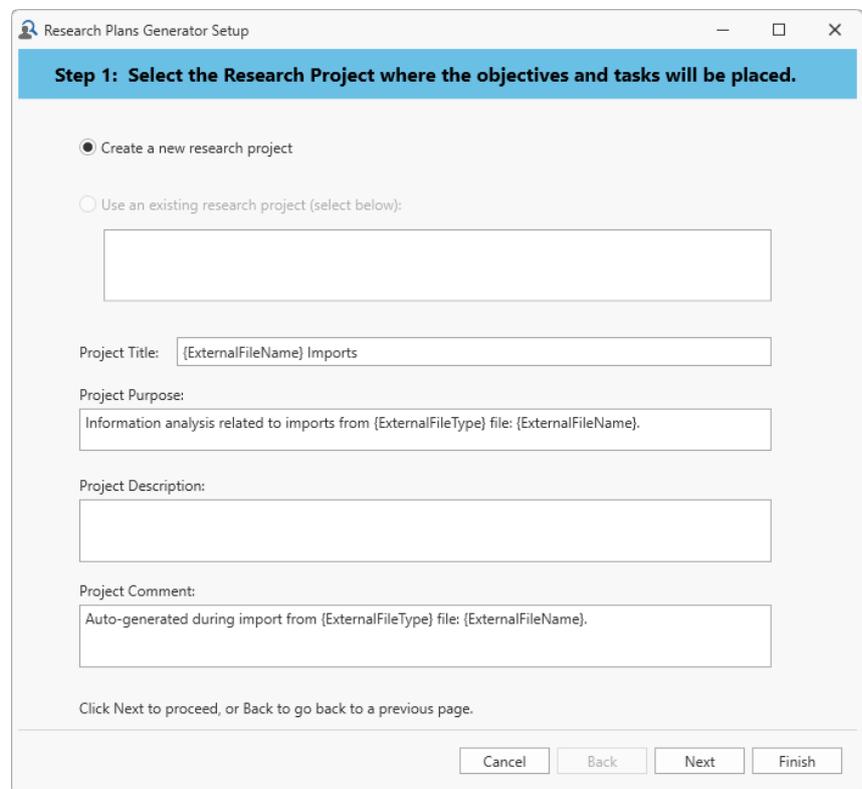
4. Designate whether you want an archive made of the Clooz database prior to importing the data (in case you decide the import results are not what you wanted).



5. Click the *Import* button.



6. If you selected the *Create Research Planning Items* option, a dialog window will now appear stepping you through a set of parameters that control how the research planning items will be generated.



Your first decision is whether to start a new Research

Project or add objectives to an existing one. You can set the Project Title, along with its purpose, description field and any comments. If you select using an existing project, the current content of the various fields for that project is displayed for editing.

The default text for the project fields include some special [placeholder variables](#)¹ (enclosed in "{ }") that will be replaced by the appropriate text. You can use these placeholders in the text you enter for any of the Project fields on this page. The field templates used for new Project records can be customized in the Options function (Home tab page).

Click Next to continue to Step 2 (or Finish to accept default selections for all remaining items and immediately execute the import action).

In Step 2, you can edit the template that will be used to generate Research Objectives.

The default text for the Research Objective fields include some special [placeholder variables](#)² (enclosed in "{ }") that will be

replaced by the appropriate text. You can use these placeholders in the text

Research Plans Generator Setup

Step 2: Adjust Objective template.

A research objective will be created for each source and list all persons who had information citing that source.

You have selected 3 subjects for import.
These subjects have information citing 3 sources.

Objective Title Template:

The objective statement to be used:

Comment (Objective):

Do not create objectives if source and related subjects have already been documented in Clooz.

Use existing objectives and tasks associated with the source.

Click Next to proceed, or Back to go back to a previous page.

¹Project Placeholders: {ExternalFileName} - the name of the external file, and {ExternalFileType} - the type of file this is, such as GEDCOM or Legacy Family Tree.

²Research Objective & Task Placeholders: {ExternalFileName} - the name of the external file, and {ExternalFileType} - the type of file this is, such as GEDCOM or Legacy Family Tree. {SourceName} - name of the source for which the objective is being generated.

you enter for any of the Research Objective fields on this page. The field templates can be customized in the Options function (Home tab page).

By default, Clooz will only create objectives if the source and any related subjects have not already been documented in Clooz. Review these settings at the bottom of the Step 2 window.

Click Next to continue to Step 3 (or Finish to accept remaining default selections and immediately execute the import action).

In Step 3 you can select those sources for which objectives and tasks will be created.

In addition, you can edit the template that will be used to create Research Tasks.

The default text for the Research Task fields

include some special [placeholder variables](#)¹ (enclosed in "{}") that will be replaced by the appropriate text. You can use these placeholders in the text

The screenshot shows a window titled "Research Plans: Generator Setup" with a blue header bar that reads "Step 3: Identify the sources for which review objective/tasks will be created." Below the header, there is a text box containing the following text: "The following sources will be entered as a research objective and task when cited by a subject's information (Unchecked sources will not generate a research item, but will still be imported.):". Below this text is a list of sources with checkboxes: (Select All), Schuylkill Co., PA - 1900 Census (roll 1484, Gen.com), Schuylkill Co., PA - 1880 Census (roll 1192), and Schuylkill Co., PA - 1870 Census (roll 1450). Below the list are three text input fields for templates: "Task Title Template:" with the value "{SourceName} Search.", "Description Template:" with the value "Search and extract information imported from {ExternalFileType} file: {ExternalFileName}.", and "Comment Template:" with the value "Auto-generated during import from {ExternalFileType} file: {ExternalFileName}.". At the bottom of the window, there is a text box with the instruction "Click Next to proceed, or Back to go back to a previous page." and four buttons: "Cancel", "Back", "Next", and "Finish".

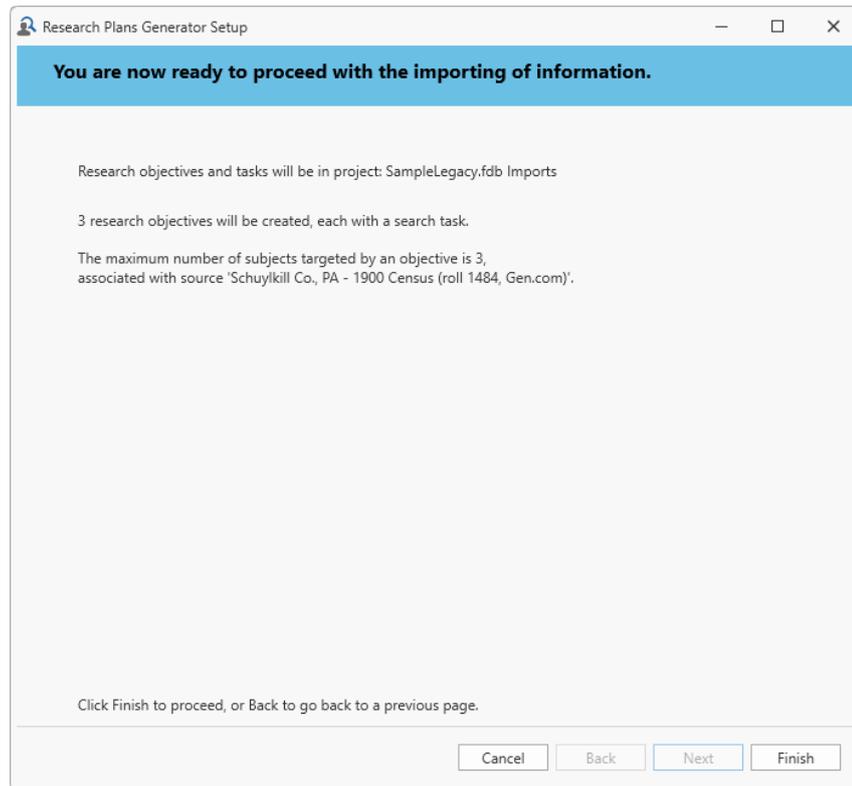
¹Research Objective & Task Placeholders: {ExternalFileName} - the name of the external file, and {ExternalFileType} - the type of file this is, such as GEDCOM or Legacy Family Tree. {SourceName} - name of the source for which the objective is being generated.

you enter for any of the Research Task fields on this page. The field templates can be customized in the Options function (Home tab page).

Click Next to Continue (or Finish to skip any further review and execute the import action).

Finally, in Step 4 you can review some statistics on what will be setup.

To execute the import action, click Finish.



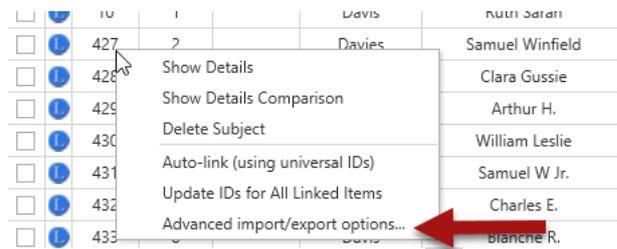
Use the Research Plan generation option as a way of providing you a checklist of what you have imported and should be reviewed to extract additional information in Clooz. Clooz is not able to decipher events from a source.



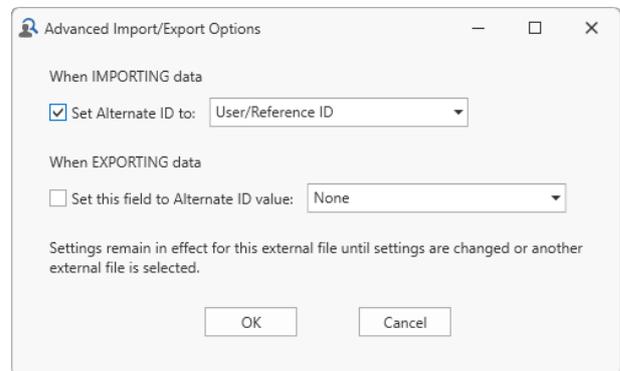
Be careful about importing large numbers of people that don't relate to your current research. It could just be making things more difficult for you in terms of finding the exact records you are looking for.

Advanced Import Options

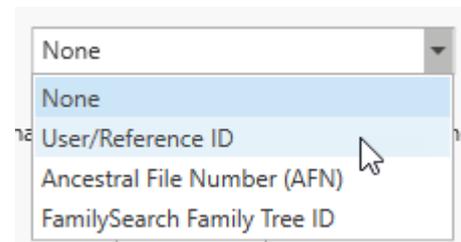
Clooz provides a special import mode allowing you to fill the Alternate ID field in a Clooz Subject with one of several identifiers the external file may have for the person being imported. To turn on this mode (which remains in effect until turned off or database is changed), select the Advanced import/export options... item in the context menu (right-click either the left or right grid in the Data Transfer Manager).



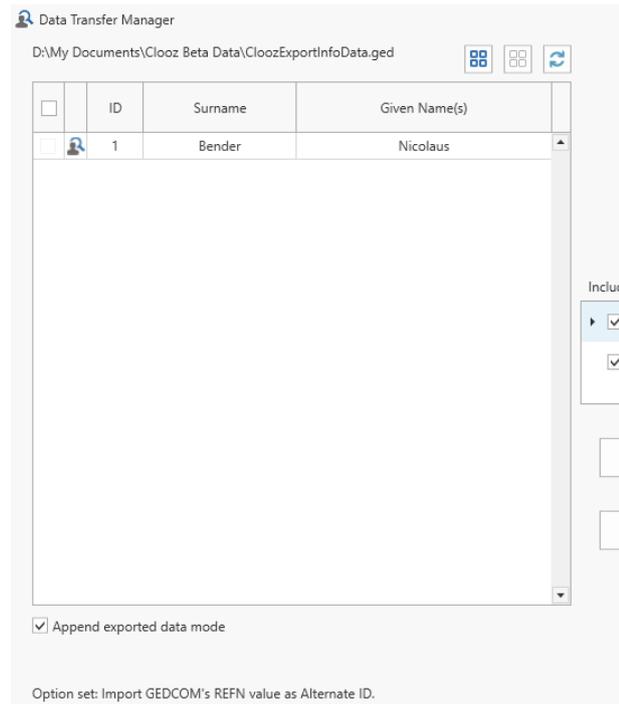
A dialog window will appear for you to make the selection of which identifiers are to be copied.



The dropdown lists will have the available options for that type of external file you are importing from.



Whenever an advanced import mode is turned on, a reminder will appear in the lower left corner of the Data Transfer Manager.



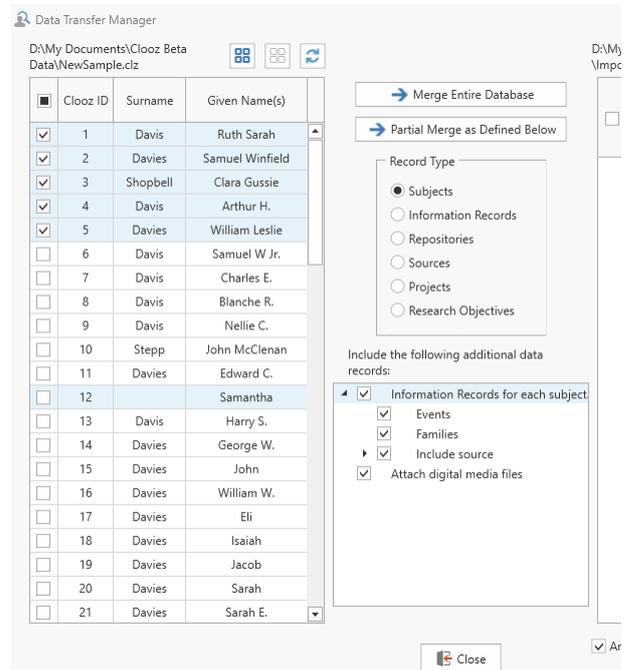
Remember that Clooz will automatically retain all of the identifier values when importing data from an external file as long as it remains a file linked to the Clooz database and the identifiers will be available on the main screen when that external file is tagged as being the Primary external file. Using the Advanced Import option to copy the selected identifier value to a Subject's Alternate ID field makes it a permanent part of the Clooz record, regardless of whether you keep or later delete the links to the external file.

Importing Data from Another Clooz Database

Importing data from another Clooz database has some slight differences in options when compared to importing from non-Clooz external files.

You can either:

- Merge all of the data from the external Clooz database into the current one, or
- Merge only the selected data and types.



To initiate the merge action, click the appropriate button at the top after desired selections have been made.



The records concerning links you had made in the external Clooz database (to other external files) are not copied to the current database. Likewise, the Research Plan generation is not available as an option when importing from other Clooz databases.

Exporting Data Using the Data Transfer Manager

Exporting from the Data Transfer Manager only exports people, sources, or repositories. Other than the vital event information (birth, death) found in the Subject records, no other event information or family relationships are exported here. To do a more complete set of data for a person or family, see Exporting Data Using the Record Exporter to export a complete Information Record. In the Record Exporter, you will be focused on one Information Record at a time (and all the records linked

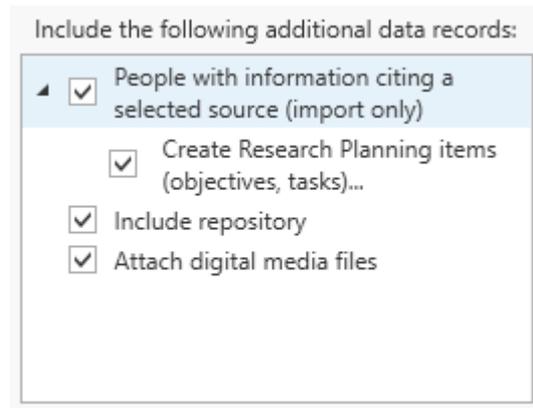
to it). Here in the Data Transfer Manager, you can export as many Subject, Source, or Repository records as you choose.

Follow these steps in the Data Transfer Manager to export Subject, Source or Repository records to an external file:

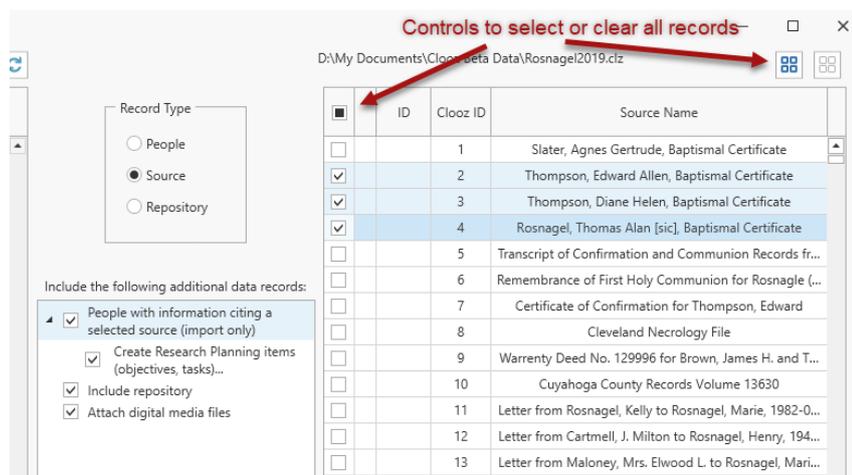
1. Select the record type to be exported. The lists of external records on the left side and Clooz records on the right side of the Data Transfer Manager will refresh to show all records of the type you select.



2. If the record type selected is Source, you can adjust the parameters of the export to include associated repositories and media files. No other associated data can be exported for People and Repository record types using this export method.



3. Select the records to be exported from the Clooz record list (right side of Data Transfer Manager). All records can be selected using the



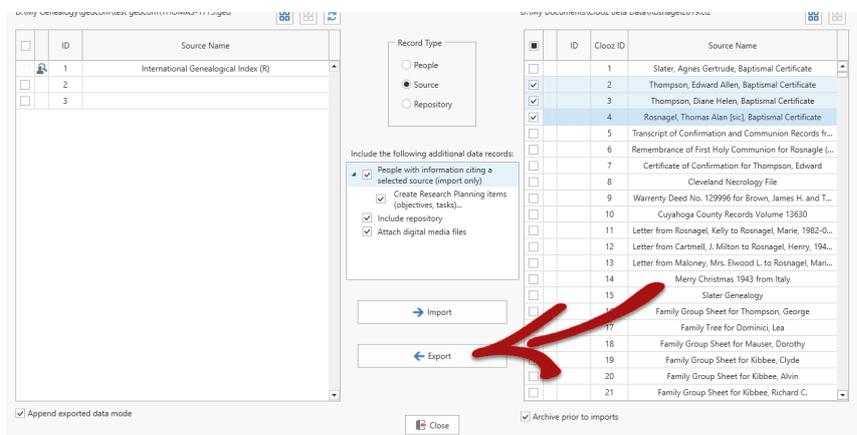
button just above the list, or the checkbox in the header of the first column in

the list.

- If you are exporting to a generic or FamilyTreeMaker GEDCOM file, there is an option that appears in the lower left corner of the Data Transfer Manager to either append the exported data to data already in the file, or start with a blank file. Check the box to operate in append mode, which will accumulate all of the data you export in multiple export actions.

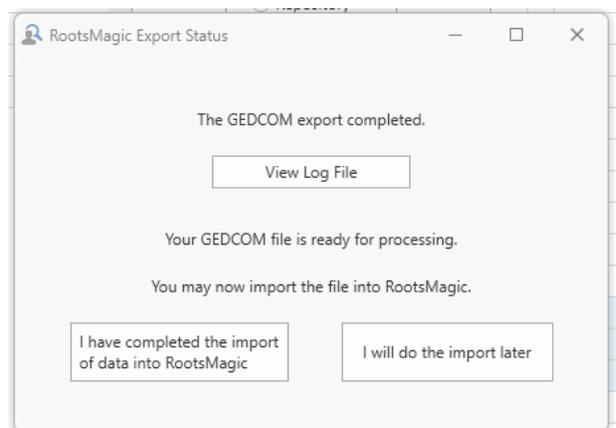
Append exported data mode

- Click the *Export* button to execute the action.



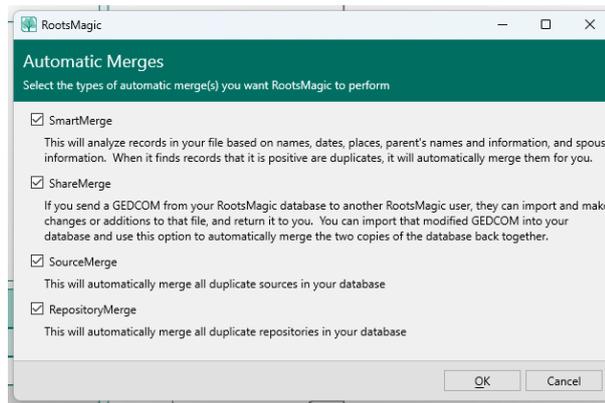
Additional Steps with RootsMagic or Ancestral Quest

If are exporting to a RootsMagic or Ancestral Quest database (via GEDCOM) a dialog window will appear following the export for you to provide additional guidance to Clooz on completing setting up the links to records just exported. It will prompt you to import the GEDCOM file into the other program's database.



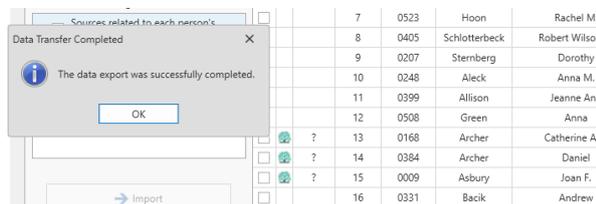
Importing into RootsMagic

When Clooz sets up the GEDCOM file for importing into RootsMagic, a universal identifier code is setup so that RootsMagic can identify the person if they are already in the database. Use the RootsMagic Automatic Merge capability to resolve duplicate records. In particular, with files from Clooz, be sure the ShareMerge box is checked.

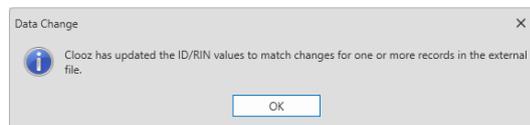


If you immediately perform the import of the GEDCOM into the respective program, and complete any merge or checks for duplication (necessary if you have exported updates to people already in the RootsMagic or Ancestral Quest database), click the *I have complete the import* button. Clooz will locate the newly added records and obtain the new record IDs in that database.

If you don't want to perform the import at this stage, click the *I will do the import later* button. Clooz will show question marks for the external file's record IDs.

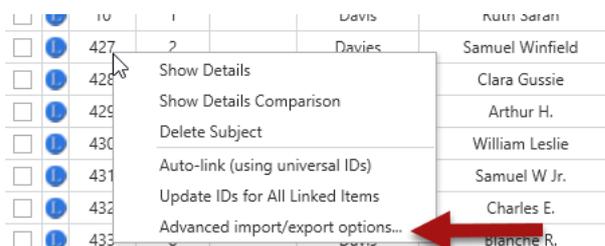


The next time the Data Transfer Manager is opened with this external file, Clooz will look for record ID updates, and update any records it locates the record IDs for. You will first see a notification message that the ID values have been updated.



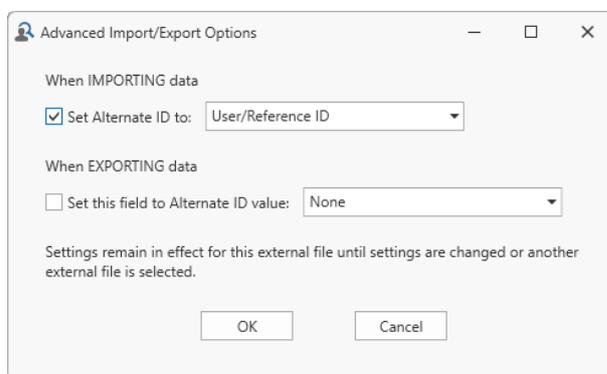
Advanced Export Options

Clooz provides a special export mode allowing you to fill one of several identifiers in the external file with text you may have in Clooz's Alternate ID field for the person being exported. To

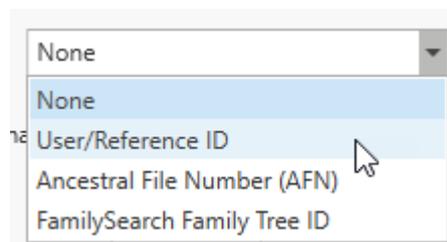


turn on this mode (which remains in effect until turned off or database is changed), select the *Advanced import/export options...* item in the context menu (right-click either the left or right grid in the Data Transfer Manager).

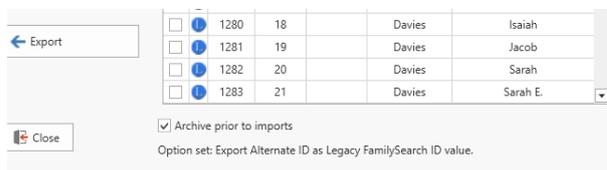
A dialog window will appear for you to make the selection of which identifiers are to be copied.



The dropdown lists will have the available options for that type of external file you are exporting to.



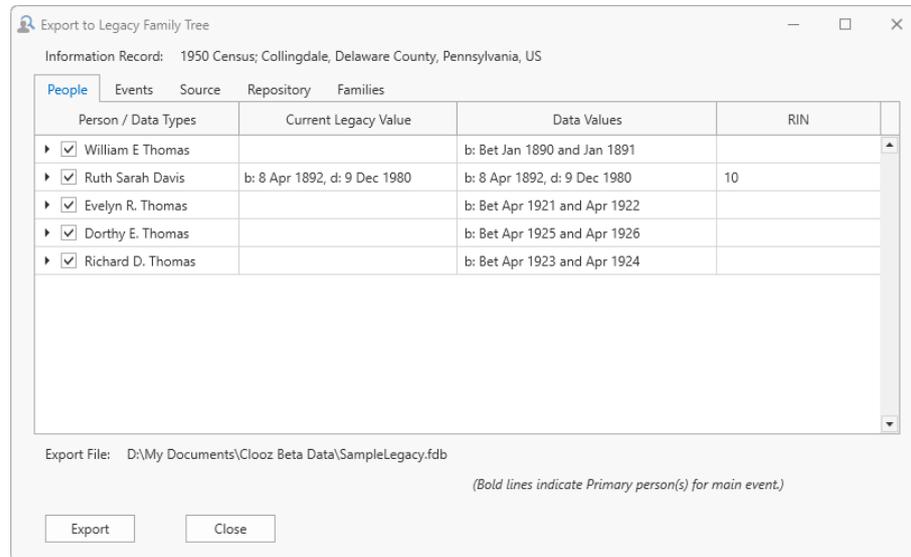
Whenever an advanced export mode is turned on, a reminder will appear below the Clooz list of records (right side of the Data Transfer Manager).



Record Exporter

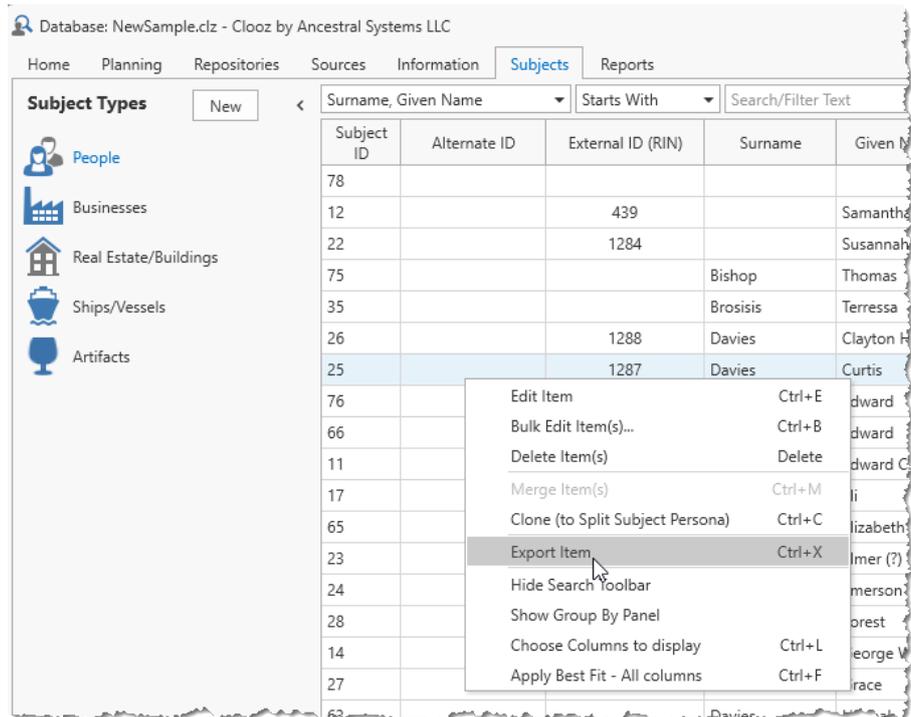
A robust export function is available to export the following record types to external files, along with all data related to the selected record:

- Subjects (People only)
- Information Records
- Sources
- Repositories

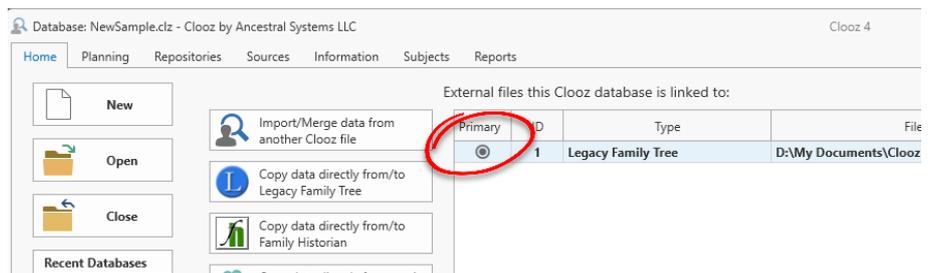


In each case, only one record can be selected for export at a time and you are given control to fine-tune which data is exported as well as the actual content. Information Records, being the core data structure in Clooz, is typically connected to one or more Subjects, possible events and family relationships, and cited by a Source and Repository. Therefore, exporting Information Records includes all of these data types.

The export process is initiated by clicking *Export Item* on the context menu for records in the various main screen lists.

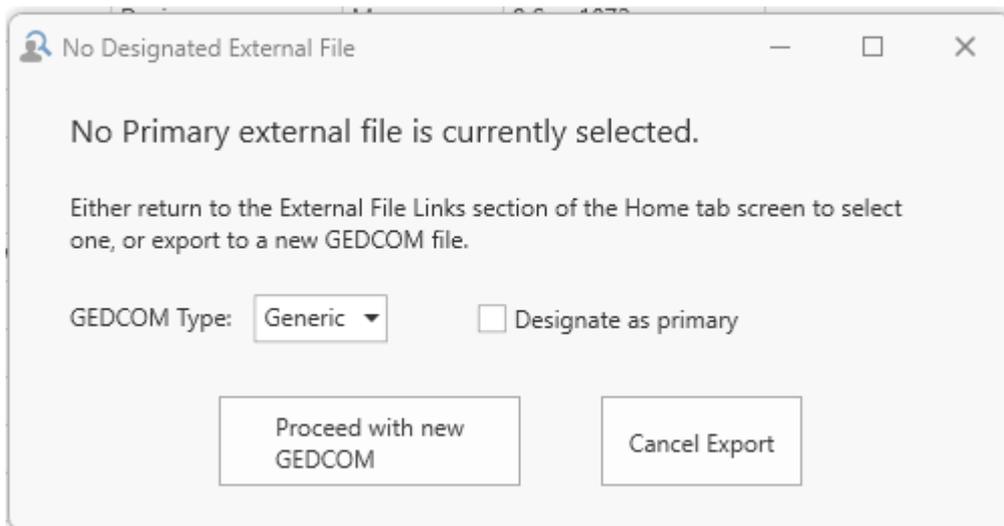


The external file which Clooz will export the data to is the one indicated as *Primary* in the *External File Links*



list. The *Primary* file is indicated by the button in the Primary column being filled, and the row displayed in bold text.

If a



Prim

ary file is not selected, when the *Record Exporter* is initiated, a window will appear indicating a new GEDCOM file can be started. Otherwise you will need to go to the *External File Links* screen on the *Home* tab page to make a different **Primary** file selection. You can designate the new GEDCOM file as the **Primary** file for subsequent exports as well.

 Data exported to GEDCOM files is added to any previous content in the file. Therefore, you may choose to go through a number of different record export operations before importing the GEDCOM file into the ultimate destination.

 It is important to first establish Primary file designation for RootsMagic and Ancestral Quest targets. Even though the data is conveyed via a GEDCOM file, there are special features or actions included that would not occur if a generic GEDCOM file is being used.

Subject Record Export

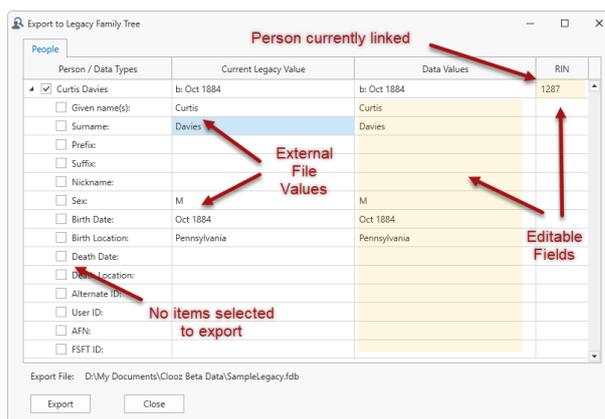
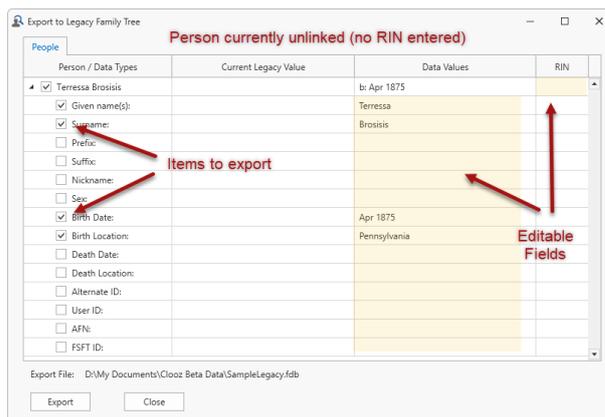
Subjects being exported by the Record Exporter appear on the People tab page within the exporter window. You have complete control over what information will be exported using the controls provided. People are the only Subjects that can be exported since no other software supports the other Subject types.

The checkboxes on the left side indicate whether the item is to be exported or not. This can be done for the entire Subject record or individual pieces of information.

A person can be identified as already existing in the external file by entering a RIN or Record Number in the field provided.

Any of the information details taken from the Clooz Subject record for the person can be edited during the export (without affecting the Subject record in Clooz).

If the person has previously been linked to a record in the external file, the record number and data content from the external file is shown.



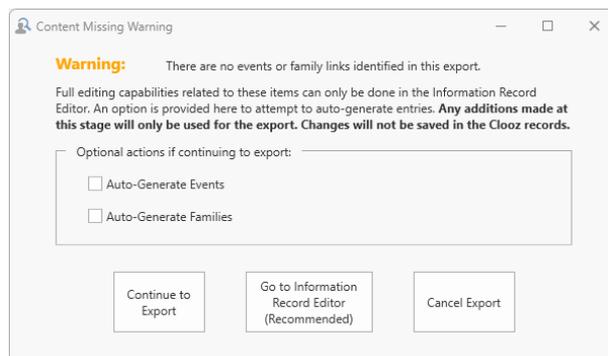
Information Record Export

Exporting Information Records from Clooz to external files provides the ability for you to export all of the various types of data in Clooz related to that record. This includes: all of the people linked to the record, along with any events and family relationships you had extracted, the source of the information, the repository where it was found, and any media files attached to the record or the source. The export window contains tabs for each of the principal data types.



Prior to clicking the Export button to execute the actual transfer of data, always review each of the tab pages to make certain the data to be exported is what you are expecting.

When exporting an Information Record, if there are no events or family relationships associated with the record, a warning message will appear. There is no requirement that events or family relationships be created, rather, the warning is just making sure you have not forgotten to process the information found in the source document. You need to indicate how you want to proceed:



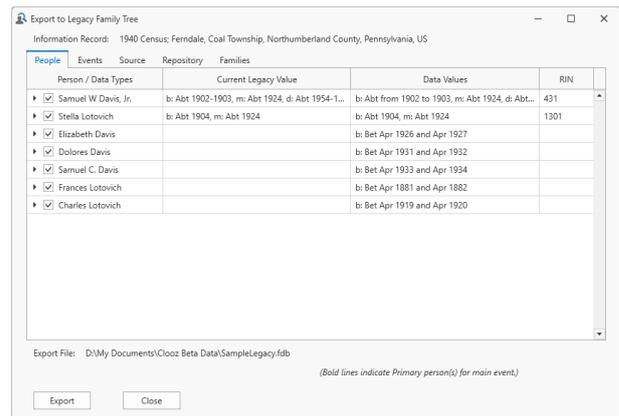
- Click *Continue to Export* to go forward with the export as is. If you checked the auto-generate boxes, Clooz will first make an attempt to generate event or family records based on the data in the Information Record. Other than auto-generated items, no new events or families can be manually setup at this stage. You would need to edit the Information Record to accomplish that.
- Click *Go To Information Record Editor* to exit the export operation and immediately bring up the Information Record in its editor. You then would have full control to extract events or family relationships. If you believe the

Information Record may provide evidence of events or family relationships, this is the recommended choice.

- Click *Cancel Export* to exit the export operation and return to the main screen of Information Records.

People Tab

Subjects being exported by the Record Exporter appear on the People tab page within the exporter window. You have complete control over what information will be exported using the controls provided. People are the only Subjects that can be exported since no other software supports the other Subject types.



See the [Subject Record Export](#) topic for an explanation of what this tab contains.

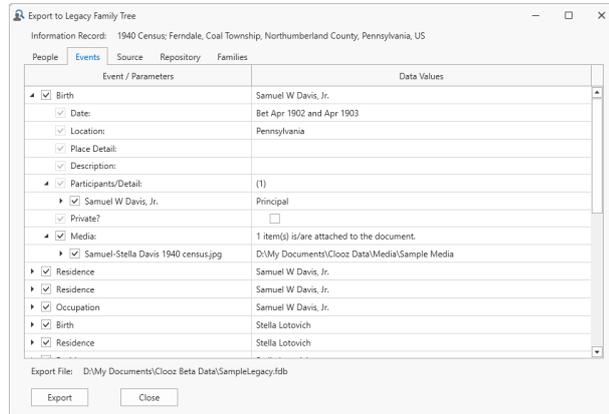
When exporting Information Records, the People tab will include all of the people linked to that record. This may or may not include persons you do not want to include in your family tree (such as a household servant or boarder). You can include or exclude a person using the check box by their name.

Events Tab

The Events tab page includes all of the events you have extracted for persons based on the Information Record being exported. You can control which details are exported using the check boxes.

The content fields are editable, so you can make temporary changes to the text that will be exported without

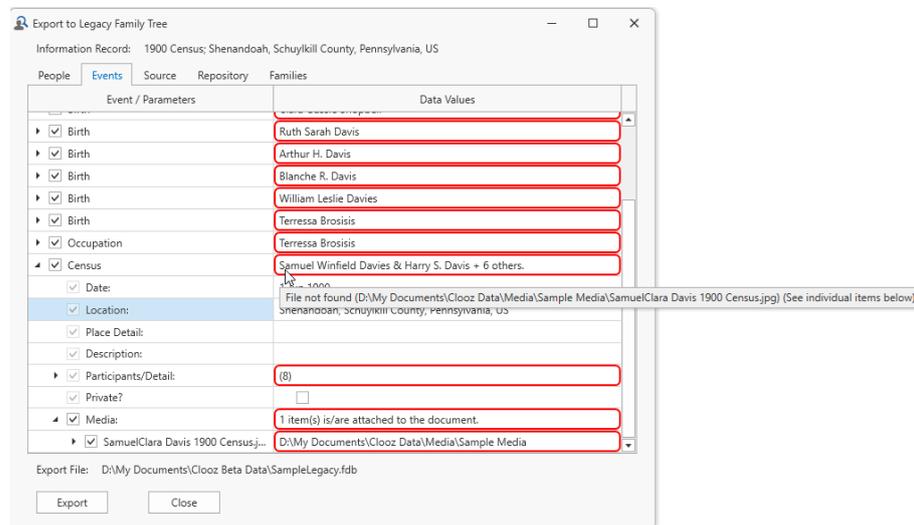
affecting the Clooz records. The Events page here is much the same as the Events panel in the Information Record editor, without the ability to manually create events or manage the list of participants.



 Events will only be shown for persons selected to be included under the People tab (check box by their name is checked).

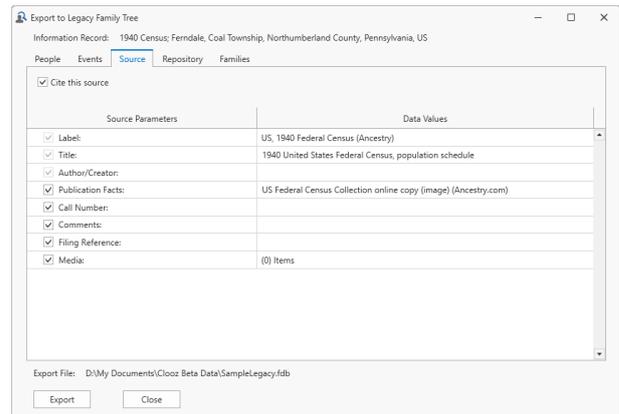
If Clooz finds errors in what is being exported, the cell is outlined in red, as well as all of its higher level cells in the hierarchy.

Hover the cursor over a cell to see what the error is.



Source Tab

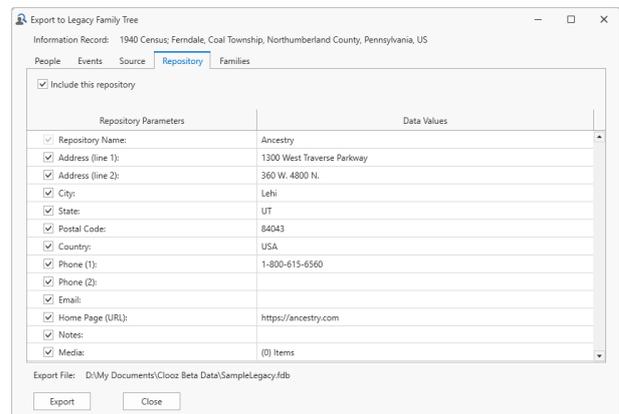
A Source record being exported by the Record Exporter appears on the Source tab within the exporter window. You have complete control over what information will be exported using the controls provided. The associated Repository is also included on the Repository tab page.



See the [Source Record Export](#) topic for an explanation of what this tab contains.

Repository Tab

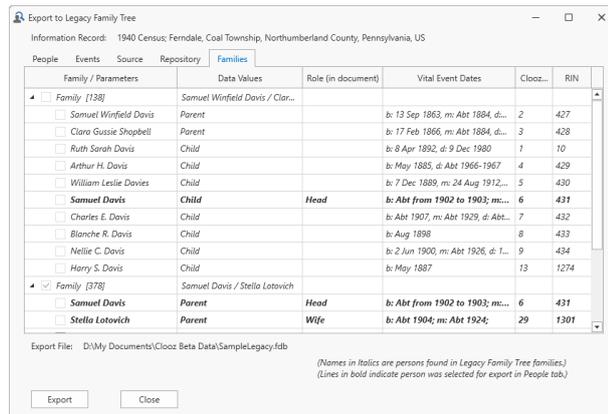
A Repository record being exported by the Record Exporter appears on the Repository tab within the exporter window. You have complete control over what information will be exported using the controls provided.



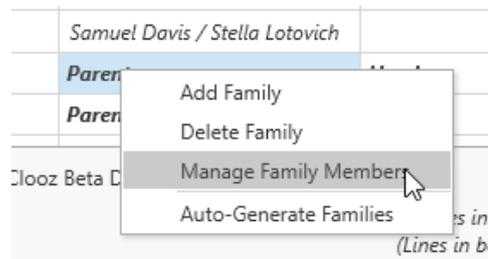
See the [Repository Record Export](#) topic for an explanation of what this tab contains.

Families Tab

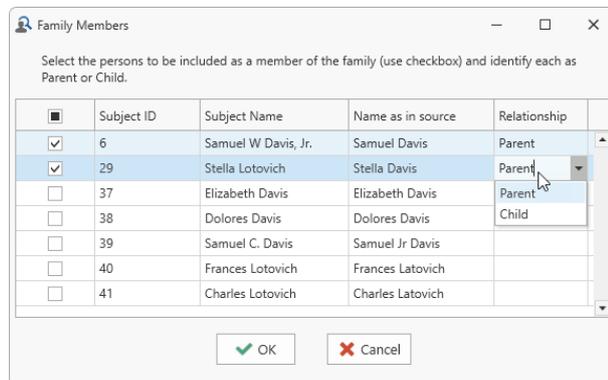
The *Families* tab page contains the parent-child relationships that were identified based on the Information Record being exported. If some of the family members are already linked to records in the external file, Clooz will show any additional family members found in the external file (shown in *italic* font). Family members who are part of this export (selected on the People tab page of this exporter) are shown in **bold** font.



You can make adjustments to the family relationships by right-clicking anywhere on the list and selecting the desired function from the context menu.



When using the Manage Family Member function, check the boxes for those person who should be part of the family, and indicate their parent or child role using the drop down list selections. A family must have at least two members (two parents, two sibling children, or one parent and one child). No more than two parents are allowed.



 A given person can appear in more than one family, with different roles (parent, child), spouses, or parents.

This page operates much the same as the [Family panel in the Information Record editor](#).

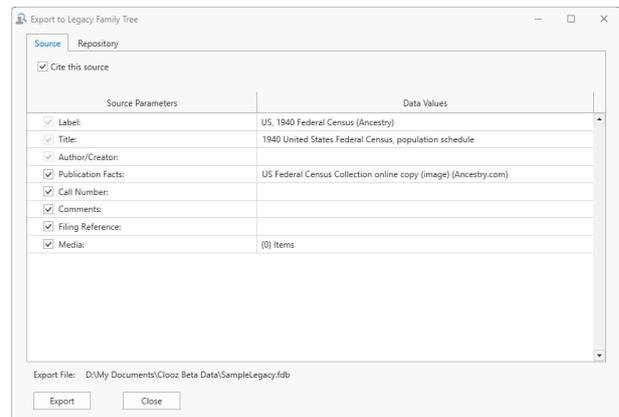
Source Record Export

Source Tab

A Source record being exported by the Record Exporter appears on the Source tab within the exporter window. You have complete control over what information will be exported using the controls provided. The associated Repository is also included on the Repository tab page.

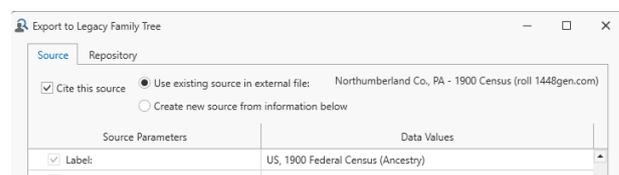
Check the checkboxes on the left side of the Source tab page for those Source elements that are to be exported.

You can edit the text within any of the fields to your desired format to be exported (without affecting the content in the Source record within Clooz).



The *Cite the Source* checkbox only applies when the Source is included as part of exporting an Information Record.

If the Source record was previously linked to a source in the external file, you can choose whether to cite the existing source in the external file, or create a new source in the external file.



Repository Tab

Information related to the repository is displayed on the Repository tab page. See the [Repository Record Export](#) topic for further discussion of exporting repositories.

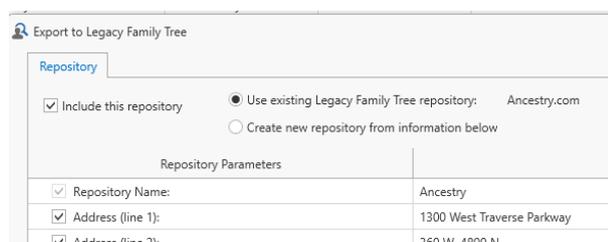
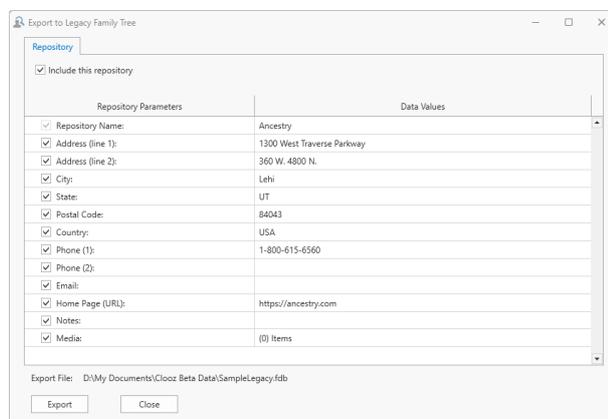
Repository Record Export

A Repository record being exported by the Record Exporter appears on the Repository tab within the exporter window. You have complete control over what information will be exported using the controls provided.

Check the check boxes on the left side of the Repository tab page for those Repository elements that are to be exported.

You can edit the text within any of the fields to your desired format to be exported (without affecting the content in the Repository record within Clooz).

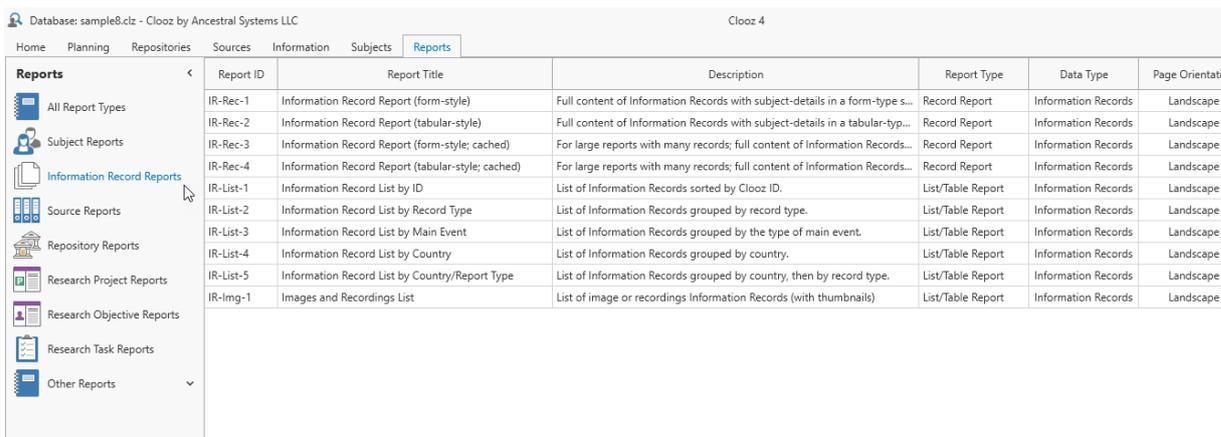
If the Repository record was previously linked to a repository in the external file, you can choose whether to use the existing repository in the external file, or create a new repository in the external file.



Chapter 13

Report Generation

The reporting functions in Clooz allow you to output information of your choosing for display in the Report Viewer, and subsequently, export the report to various file formats (Adobe pdf files, MS Word documents, MS Excel spreadsheets, rich text files, HTML files, Comma Separated Values (CSV) files, Image files, or just plain text. The full list of available reports appear under the Reports tab on the main screen of Clooz. Standard reports are included for all of the major record types in Clooz, with several layouts and record groupings provided for each. Further customization of the final report output is done in the Report Viewer.



Report ID	Report Title	Description	Report Type	Data Type	Page Orientation
IR-Rec-1	Information Record Report (form-style)	Full content of Information Records with subject-details in a form-type s...	Record Report	Information Records	Landscape
IR-Rec-2	Information Record Report (tabular-style)	Full content of Information Records with subject-details in a tabular-typ...	Record Report	Information Records	Landscape
IR-Rec-3	Information Record Report (form-style; cached)	For large reports with many records; full content of Information Records...	Record Report	Information Records	Landscape
IR-Rec-4	Information Record Report (tabular-style; cached)	For large reports with many records; full content of Information Records...	Record Report	Information Records	Landscape
IR-List-1	Information Record List by ID	List of Information Records sorted by Clooz ID.	List/Table Report	Information Records	Landscape
IR-List-2	Information Record List by Record Type	List of Information Records grouped by record type.	List/Table Report	Information Records	Landscape
IR-List-3	Information Record List by Main Event	List of Information Records grouped by the type of main event.	List/Table Report	Information Records	Landscape
IR-List-4	Information Record List by Country	List of Information Records grouped by country.	List/Table Report	Information Records	Landscape
IR-List-5	Information Record List by Country/Report Type	List of Information Records grouped by country, then by record type.	List/Table Report	Information Records	Landscape
IR-Img-1	Images and Recordings List	List of image or recordings Information Records (with thumbnails)	List/Table Report	Information Records	Landscape

The design of the report layouts in Clooz has been done to make the reports most useable for the typical user. An assumption has been made that you probably only have a regular size printer supporting Letter/Legal/A4 paper sizes. Some Information Records (such as censuses) would require a tabloid size paper to replicate the same table structure used when editing the records in a readable font size. Therefore, rather than attempting to replicate the format of the original document in the report, the priority has been placed on producing a readable report containing the required data within the available space. Numerous options related to

this space utilization have been included allowing you to customize the resulting report to best meet your reporting needs.

In addition to the reporting function in Clooz, a feature is available to directly output the contents of an individual record (and all of its components) to an Excel worksheet file. The layout of the data in this spreadsheet file will more closely resemble the original template structure (especially for tabular type Information Record templates).

Report Layout Types

There are two types of layouts used in Clooz's reports to organize how the records appear in the report and how much of the details are included. These are:

- Individual Record Reports, and
- List Reports.

Individual Record Reports

Reports using the individual record type layout can include all of the data associated with each record (equivalent to that available when editing a record in the record editor). Information Records, for example, would include associated events and families, related research tasks, linked media items, a source and repository.

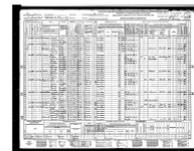
Individual Record Layout for Information Records

Information Records have an additional level of detail (the details for each subject) when compared to other record types. This data can be formatted in a form type style, or in a table/tabular style. This only applies to the subject detail fields. This is somewhat parallel to the difference in form and tabular templates for the Information Record editor, although either style can be used with any type of Information Record (whether it was a form template or a tabular template).

Data fields, when presented using the form style, show each data field with the field label appearing beneath the value. The whole block of fields gets repeated for each subject in the Information Record. The block of data for one subject is not split across page boundaries.

1940 US Census; Ferndale, Coal Township, Northumberland County, Pennsylvania, United States (7 subjects)

6 1 April 1940 United States Pennsylvania Northumberland County Coal Township Ferndale
Clooz ID Census Day Country State/Territory County Township Locality
 13 49-8 16 July 2022
Supervisor's Enumeration District Access Date



Source: Ancestry.com. 1940 United States Federal Census. US Federal Census Collection (Provo, Utah, United States: Ancestry.com Operations, Inc., 2012). From United States of America, Bureau of the Census. Sixteenth Census of the United States, 1940. Washington, D.C.: National Archives and Records Administration, 1940. T627, 4,643 rolls..

Samuel W Davis, Jr. [6]

19 APR 1940 17B 74 Fern, 1133 293 O 1400 Davis Samuel Head M W 37
Census Taken Date Page Line Place of Residence Family Number Owned/Rented Real Estate Living on Farm Surname Given Name Relationship Sex Race Age
 Coal Township, Northumberland County, Pennsylvania
 M H-4 Pennsylvania
Marital Status Attended School School Grade Completed Birth Place 1935 Residence Living on Farm (1935) Working (non-emergency) Working (Emergency) Seeking work Employed work
 24 Painter Paint Co. PW Yes
Hours worked prev. week Occupation Industry Employment Role Unearned Income Veteran Child of Dead Veteran Had SSN SSN Deductions Had multiple marriages

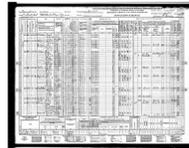
Subject Details in form-style

Tabular style details are listed in rows and columns, with the column header appearing at the top. Note that with the tabular style, whatever fields cannot fit within the width of the page are consolidated on the lines following. Those fields having the most interest in family history research have been given a higher priority

to appear in the initial row of data. Therefore, the order of the fields may not be exactly the same as the original editing template.

1940 US Census; Ferndale, Coal Township, Northumberland County, Pennsylvania, United States (7 subjects)

6	1 April 1940	United States	Pennsylvania	Northumberland County	Coal Township	Ferndale
<i>Clooz ID</i>	<i>Census Day</i>	<i>Country</i>	<i>State/Territory</i>	<i>County</i>	<i>Township</i>	<i>Locality</i>
13	49-8	16 July 2022				
<i>Supervisor's District</i>	<i>Enumeration District</i>	<i>Access Date</i>				



Source: Ancestry.com. 1940 United States Federal Census. US Federal Census Collection (Provo, Utah, United States: Ancestry.com Operations, Inc., 2012). From United States of America, Bureau of the Census. Sixteenth Census of the United States, 1940. Washington, D.C.: National Archives and Records Administration, 1940. T627, 4,643 rolls..

Page	Line	Surname	Given Name	Relationship	Sex	Race	Age	Marital Status	Birth Place	1935 Residence	Occupation	Industry
17B	74	Davis	Samuel	Head	M	W	37	M	Pennsylvania	Coal Township, Northumberland County, Pennsylvania	Painter	Paint Co.
<i>Census Taken Date: 19 APR 1940; Place of Residence: Fern, 1133; Family Number: 293; Owned/Rented: O; Real Estate: 1400; School Grade Completed: H-4; Working (non-emergency); Hours worked prev. week: 24; Employment Role: PW; Unearned Income: Yes</i>												
17B	75	Davis	Stella	Wife	F	W	36	M	Poland	Coal Township, Northumberland County, Pennsylvania		
<i>Census Taken Date: 19 APR 1940; Place of Residence: Fern, 1133; Family Number: 293; School Grade Completed: 6; Unearned Income: Yes</i>												
17B	76	Davis	Elizabeth	Daughter	F	W	13	S	Pennsylvania	Coal Township, Northumberland County, Pennsylvania		
<i>Census Taken Date: 19 APR 1940; Place of Residence: Fern, 1133; Family Number: 293; Attended School; School Grade Completed: 7</i>												
17B	77	Davis	Dolores	Daughter	F	W	8	S	Pennsylvania	Coal Township, Northumberland County, Pennsylvania		
<i>Census Taken Date: 19 APR 1940; Place of Residence: Fern, 1133; Family Number: 293; Attended School; School Grade Completed: 2</i>												
17B	78	Davis	Samuel Jr	Son	M	W	6	S	Pennsylvania	Coal Township, Northumberland County, Pennsylvania		
<i>Census Taken Date: 19 APR 1940; Place of Residence: Fern, 1133; Family Number: 293; Attended School; School Grade Completed: 0</i>												

Subject Details in tabular-style



Tabular style uses less space than the form style. However, the form style is more compatible to changes of the page orientation to Portrait mode.



The example reports shown above include a thumbnail image of the document. The size of this thumbnail is an option given in the Report Viewer (including eliminating it). There are other options such as skipping blank fields or consolidating location parts (country, state, etc) into a single location sequence to save space.

In Clooz 4, some record types such as Information Records can have a large amount of data (associated events, families, media links, etc.). Therefore, even a single individual record can result in a multi-page report. Since reports using this

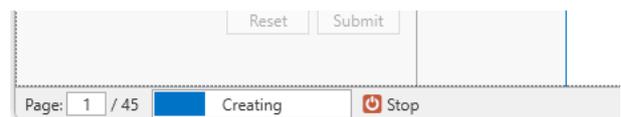
layout can actually include multiple records (such as multiple Information Records or multiple Subjects), you should be careful regarding how many records you seek to include in this type report. Besides taking a long time to process, the report could quickly grow to hundreds or thousands of pages.

Reports are assembled in your computer's memory, so it is possible the size of the report you generate exceeds the amount of free memory in your system, resulting in an Out of Memory error. You could reduce the

Report ID	Report Title	
IR-Rec-1	Information Record Report (form-style)	Full content o
IR-Rec-2	Information Record Report (tabular-style)	Full content o
IR-Rec-3	Information Record Report (form-style; cached)	For large repo
IR-Rec-4	Information Record Report (tabular-style; cached)	For large repo
S-Rec-1	Subject Record (Any type)	Individual sub
IR-List-1	Information Record List by ID	List of Informa
IR-List-2	Information Record List by Record Type	List of Informa

size of thumbnails or eliminate some of the detailed sub-item categories to reduce the size of the report. However, there are some special reports designed to cache the report contents to your computer's disk instead of holding it all in memory, allowing you to produce very large reports. These report types are tagged as "cached". They require less memory, but take longer to generate. If you are generating a report using the Individual Record Layout for many Information Records, you may need to use the cached version of the report depending on your computer's resources.

Reports generated using this cached approach are generated in background, allowing you to begin viewing the beginning pages of the report while the rest is completed. The status (number of pages generated) is shown in the lower left corner of the report viewer window.



List Reports

List type reports only provide a limited set of information for each included record. This is the same set of information that is used in the lists of records that appear on the main screen of Clooz.

Information Records Report						
Clooz ID	Alternate ID	Year	Record Type	Location	User Rating	Source
2			Photograph			
3		1900	Census (US)	Shenandoah, Schuylkill County, Pennsylvania, US		US, 1900 Federal Census (Ancestry)
4		1920	Census (US)	Shamokin, Northumberland County, Pennsylvania, US		US, 1920 Federal Census (Ancestry)
5		1910	Census (US)	Shamokin, Northumberland County, Pennsylvania, US		US, 1910 Federal Census (Ancestry)
6		1940	Census (US)	Ferndale, Coal Township, Northumberland County, Pennsylvania, US		US, 1940 Federal Census (Ancestry)
7		1930	Census (US)	Ferndale, Coal Township, Northumberland County, Pennsylvania, US		US, 1930 Federal Census (Ancestry)
8		1950	Census (US)	Baltimore, Maryland, US		US, 1950 Federal Census (Ancestry)
9		1920	Census (US)	Coal Township, Northumberland County, Pennsylvania, US		US, 1920 Federal Census (Ancestry)
10		1930	Census (US)	Shamokin, Northumberland County, Pennsylvania, US		US, 1930 Federal Census (Ancestry)
11		1940	Census (US)	Littlestown, Adams County, Pennsylvania, US		US, 1940 Federal Census (Ancestry)
12		1950	Census (US)	Collingdale, Delaware County, Pennsylvania, US		US, 1950 Federal Census (Ancestry)
13		1917	Military Entry Record	Northumberland County, Pennsylvania, US		US, World War I Draft Registration Cards (Ancestry)
14		1890	Directory [Population]	5th Ward, Shenandoah, Schuylkill County, Pennsylvania, U.S.		PA, Schuylkill County Directory from Eleventh Census (Ancestry)
15		1923	Death Record	Shamokin, Northumberland County, Pennsylvania, U.S.	★	U.S., Pennsylvania, Death Certificates, 1906-1968 (Ancestry)

Large Reports

Clooz generates reports in your computer's system memory prior to displaying it. When the report has many thousands of records you may find that Clooz runs out of system memory and displays an error message. This is particularly true with information record reports since they tend to have the most data. To alleviate this limitation, you will find several of the information record reports are labeled as "cached" and are specifically setup for large volumes. These cached reports make more efficient use of the system memory and avoid the memory limitation altogether. However, report generation with these is a bit slower than the other report types which is why most reports are not done using this approach.

Generate a Report

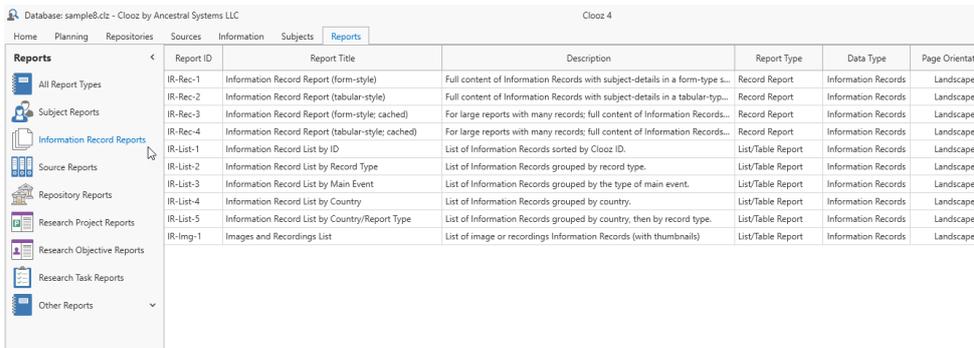
A report can be generated from various locations in Clooz:

- Selecting a report from the list in the Reports tab page; double-click or use the context menu (right-click),
- Using the context menu (right-click) of a record or group of records from the list of records on one of the other tabs on the main screen, or
- Selecting the Report button on one of the record editors.

You will have slightly different choices and required actions depending on which location you make the request to generate a report.

Requesting a Report from the Reports Tab Page

The Reports tab page contains a list of all available report types. The list can be filtered down to a specific record type by selecting the desired record type on the left-side navigation panel.



The screenshot shows the 'Reports' tab page in the Clooz application. The left navigation panel is expanded to show 'Information Record Reports'. The main content area displays a table of report types with columns for Report ID, Report Title, Description, Report Type, Data Type, and Page Orientation.

Report ID	Report Title	Description	Report Type	Data Type	Page Orientation
IR-Rec-1	Information Record Report (form-style)	Full content of Information Records with subject-details in a form-type s...	Record Report	Information Records	Landscape
IR-Rec-2	Information Record Report (tabular-style)	Full content of Information Records with subject-details in a tabular-typ...	Record Report	Information Records	Landscape
IR-Rec-3	Information Record Report (form-style; cached)	For large reports with many records; full content of Information Records...	Record Report	Information Records	Landscape
IR-Rec-4	Information Record Report (tabular-style; cached)	For large reports with many records; full content of Information Records...	Record Report	Information Records	Landscape
IR-List-1	Information Record List by ID	List of Information Records sorted by Clooz ID.	List/Table Report	Information Records	Landscape
IR-List-2	Information Record List by Record Type	List of Information Records grouped by record type.	List/Table Report	Information Records	Landscape
IR-List-3	Information Record List by Main Event	List of Information Records grouped by the type of main event.	List/Table Report	Information Records	Landscape
IR-List-4	Information Record List by Country	List of Information Records grouped by country.	List/Table Report	Information Records	Landscape
IR-List-5	Information Record List by Country/Report Type	List of Information Records grouped by country, then by record type.	List/Table Report	Information Records	Landscape
IR-Img-1	Images and Recordings List	List of image or recordings Information Records (with thumbnails)	List/Table Report	Information Records	Landscape

Initiate the request to generate a report by doing one of the following:

- double-click the desired report item,
- right-click the desired report item and choose the Generate Report item from the popup context menu, or
- select the desired report item and press Ctrl-R.

Report ID	Report Title	Description	Report Type
IR-Rec-1	Information Record Report (form-style)	Full content of Information Records with subject-details in a form-type...	Record Report
IR-Rec-2	Information Record Report (tabular-style)	Full content of Information Records with subject-details in a tabular-type...	Record Report
IR-Rec-3	Information Record Report (form-style; cached)	For large reports with many records; full content of Information Records...	Record Report
IR-Rec-4	Information Record Report (tabular-style; cached)	For large reports with many records; full content of Information Records...	Record Report
S-Rec-1	Subject Record (Any type)	Individual subject records with associated records (events, families, etc.)	Record Report
IR-List-1	Information Record List by ID	List of Information Records sorted by Clooz ID.	List/Table Report
IR-List-2	Information Record List by Record Type	Sorted by record type.	List/Table Report
IR-List-3	Information Record List by Main Event	Sorted by the type of main event.	List/Table Report
IR-List-4	Information Record List by Country/R	Sorted by country.	List/Table Report
IR-List-5	Information Record List by Country/R	Sorted by country, then by record type.	List/Table Report
IR-Img-1	Images and Recordings List	Information Records (with thumbnails)	List/Table Report
SP-List-1	Subjects List Report - People		List/Table Report
SP-List-2	Subjects List Report - People by Sum	Summary (Subject Records)	List/Table Report
SB-List-1	Subjects List Report - Businesses		List/Table Report



When initiating Individual Record type reports (those that don't have "List" in the name) from the Reports list, note that no data record has been selected. You will have to select the desired record(s) upon entry into the Report Viewer before a report will be generated. The Report Viewer will notify you of this required action.

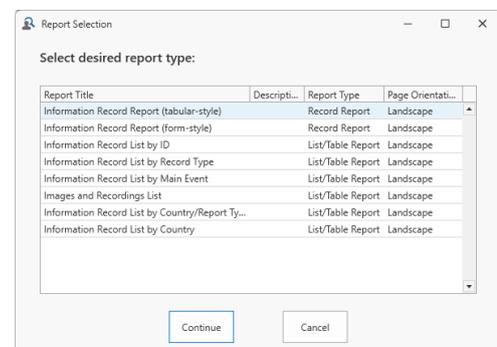
List type reports will default to show all records. Options to filter the list down may be available in the Report Viewer depending on the data type.

Requesting a Report from a Records List

Initiate a request to generate a report from the list of data records on one of the main screen tabs by selecting one or more data records and then right clicking and clicking the Generate Report item (keyboard shortcut is Ctrl-R).

Info Record ID	Personal File ID	Document Type	Event Type	Year	Country	State/Province	
		Photograph					
		Census (US)	Census	1900	US	Pennsylvania	Schuylk
		Census (US)	Census	1920	US	Pennsylvania	Northu
		Census (US)	Census	1910	US	Pennsylvania	Northu
		Census (US)	Census	1940	US	Pennsylvania	Northu
		Census (US)	Census			vania	Northu
		Census (US)	Census			d	
		Census (US)	Census			vania	Northu
0		Census (US)	Census			vania	Northu
1		Census (US)	Census			vania	Adams
2		Census (US)	Census			vania	Delawa
3		Military Entry Record	Military Serv			vania	Northu
4		Directory [Population]	Residence			vania	Schuylk
5		Death Record	Death			vania	Northu
6		Census (UK)	Census				Cardigi
7		Census (US)	Census			vania	Northu
8		Census (US)	Census			vania	Schuylk
9		Census (US)	Census			vania	Luzern
1		Passenger List	Travel				

Clooz will then pop up a window for you to choose which type of report you want to generate.



List type reports have the following options to indicate which records are to appear in the report:

- The records specifically selected (when you clicked the Generate Report command)

- The records as currently filtered in the list
- All records of this data type

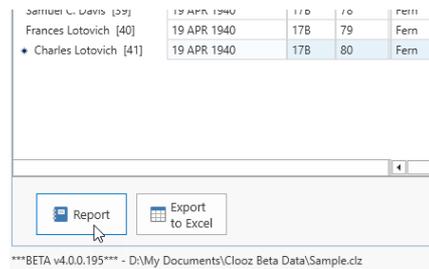
If this is an Individual Record type report, your initial selections (when you clicked the Generate Report command) will be in the report, although there is an option in the Report Viewer to change the record selection.



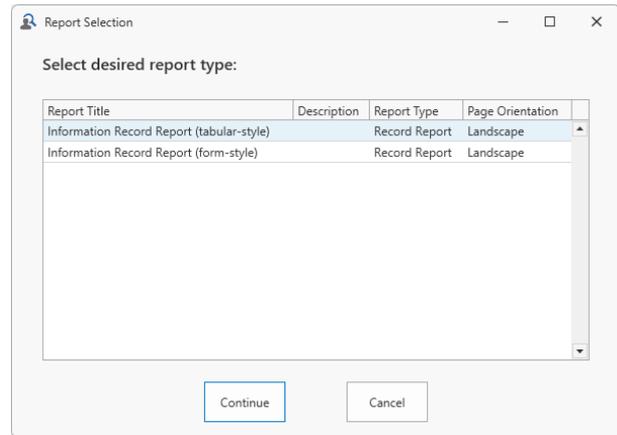
If you intend to generate a list of only some records of those in the database, it may be faster to do the filtering in the main screen list versus using the filtering options in the Report Viewer. This is particularly true if you have a large set of data (thousands) in the database. The filtering options on the main screen list offer some additional filtering options not available within the Report Viewer. Something to keep in mind.

Requesting a Report from a Record Editor

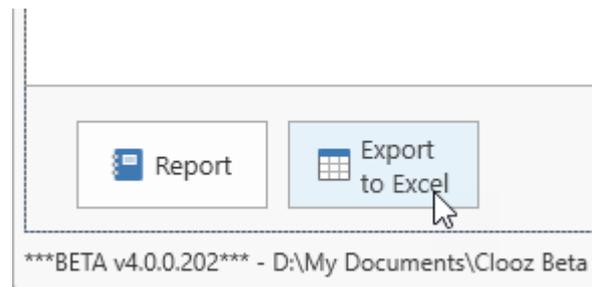
There is a Report button, as well as an Export to Excel button in the lower left corner of each of the data editors in Clooz.



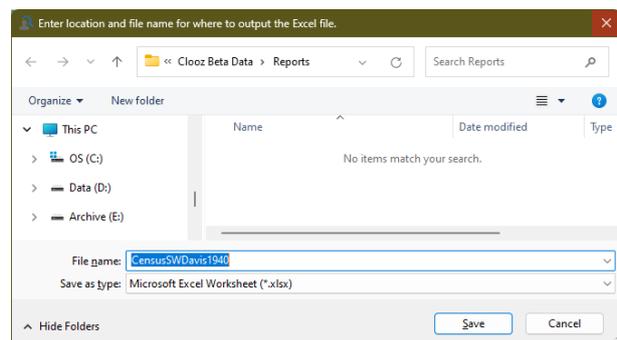
Clicking the Report button will bring up the Report Selection window for you to pick which report to run. Only Individual Record reports are supported from the editors, since only one record has been selected (the one you are editing).



Clicking the Export to Excel button in any of the data editors will have Clooz produce an Excel worksheet file (with multiple worksheet pages for most data types) that is a content dump of the data associated with the data record currently being edited.



The first step to occur is selecting the filename and location for the new worksheet file.



The worksheet file will then be created at that location and opened in Excel (or whatever program your computer has set as the default program for the .xlsx file

type). Tabs (worksheets) are setup in Excel to contain all the information in various types of records associated with the record originally opened in the editor. This Excel file is then a complete dump of all the information from that individual data record.

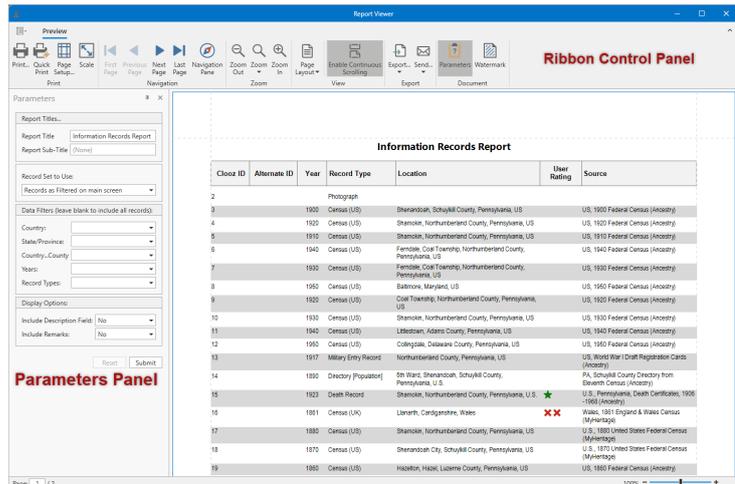
Date Census Taken (enumeration date)	Sheet	Line	Location		Household Data			Surname	Given Name	Relationship	Personal Description				Education		Place of Birth	Citizenship
			Street	House Number	Family No.	Owned or Rented	Value of Home				Farm?	Sex	Race	Age	Marital Status	Attended School		
19 APR 1940	17B	74	Fern	1133	293	O	1400	Davis	Samuel	Head	M	W	37	M		H-4	Pennsylvania	
19 APR 1940	17B	74	Fern	1133	293	O	1400	Davis	Samuel	Head	M	W	37	M		H-4	Pennsylvania	
19 APR 1940	17B	75	Fern	1133	293			Davis	Stella	Wife	F	W	36	M		6	Poland	Na
19 APR 1940	17B	76	Fern	1133	293			Davis	Elizabeth	Daughter	F	W	13	S	X	7	Pennsylvania	
19 APR 1940	17B	77	Fern	1133	293			Davis	Dolores	Daughter	F	W	8	S	X	2	Pennsylvania	
19 APR 1940	17B	78	Fern	1133	293			Davis	Samuel Jr	Son	M	W	6	S	X	0	Pennsylvania	
19 APR 1940	17B	79	Fern	1133	293			Latovich	Frances	Mother in Law	F	W	58	Wd		2	Poland	AI
19 APR 1940	17B	80	Fern	1133	293			Latovich	Charles	Brother in Law	M	W	20	S		H-1	Pennsylvania	

Report Viewer

Each time you request a report to be generated it will be displayed in the Report Viewer window. You can either examine the report here and work interactively with it, or ultimately choose to export it to one of the supported file types.

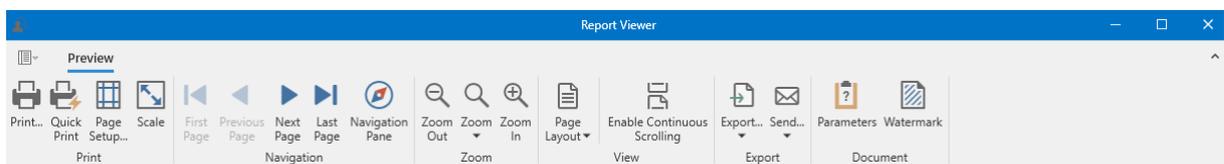
There are three principal features of the viewer:

- Ribbon Control Panel
(Where the print and export functions are located)
- Parameters Panel
(Where you customize the content of the report)
- Report Content



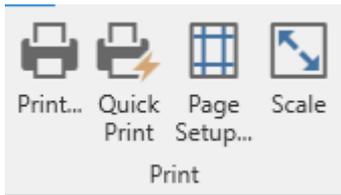
Report Viewer Ribbon Toolbar

The ribbon panel at the top of the Report Viewer contains a variety of controls to perform different actions such as print, navigating through the report pages, zooming of the display, and exporting of the report.



Print and Page Setup

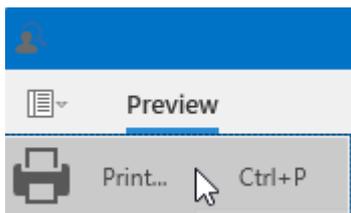
The Print section of the ribbon controls provides you control over printer actions related to the report.



Print a Document Using the Print Dialog

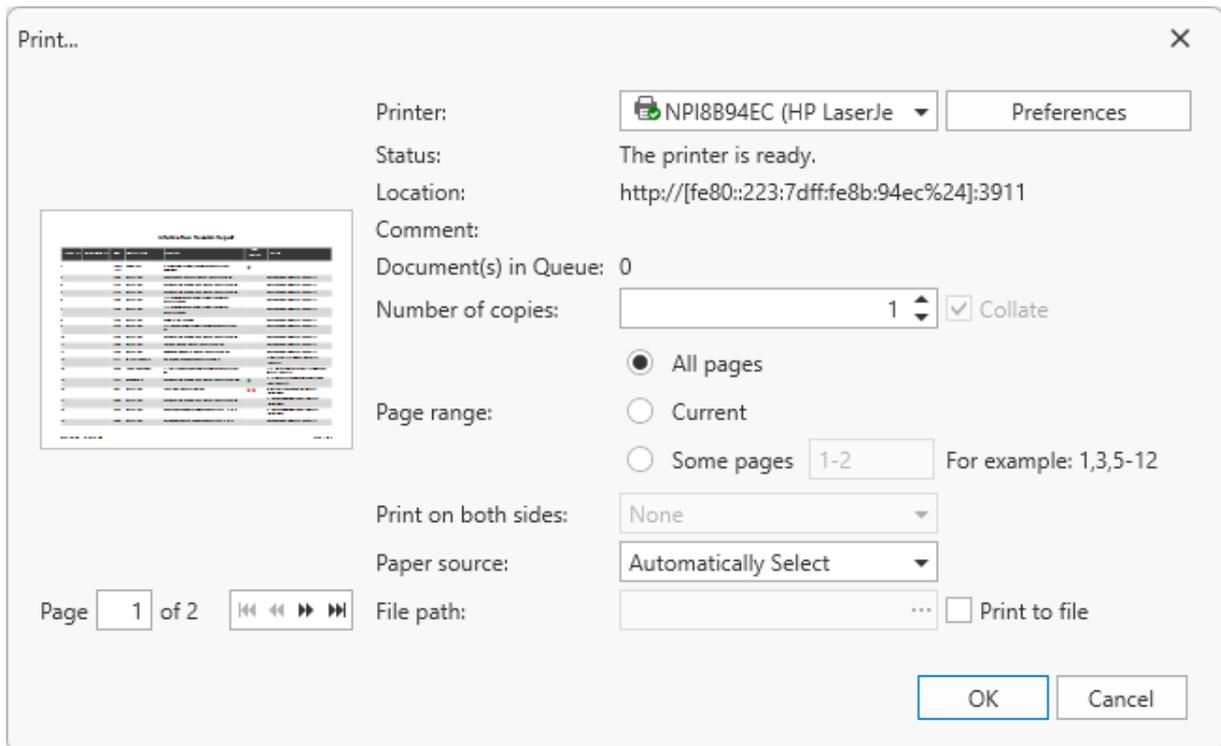
To print a document, do one of the following.

- Click the **Print...**  button on the toolbar.
- On the menu, click **Print...**



- Press CTRL+P.

In the invoked **Print** dialog, specify the necessary settings (the printer name, number of copies, page range, etc.) and click **OK**.



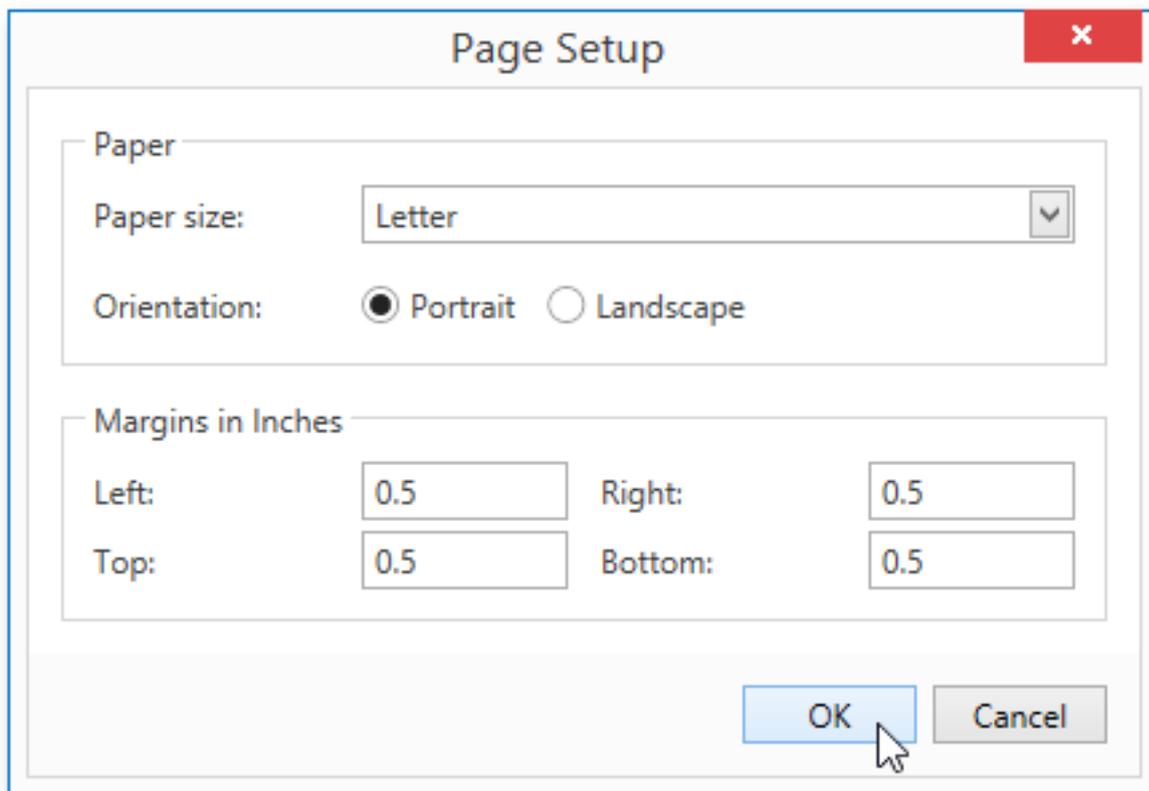
Print a Document Using Default Settings

To send a document directly to the default printer without customizing print settings,

click the **Quick Print**  button on the Preview's toolbar.

Change Print Settings Using the Page Setup Dialog

To invoke the **Page Setup** dialog, click the **Page Setup...**  button on the Print Preview's toolbar.



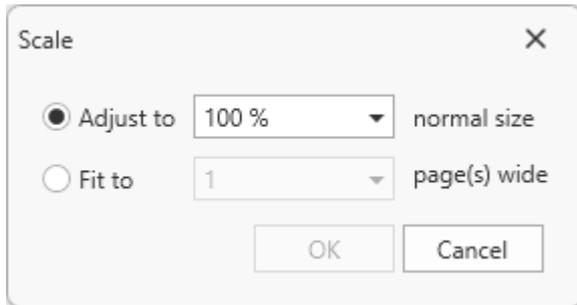
The **Page Setup** dialog allows you to do the following.

- Change the paper size using the dedicated drop-down.
- Select page orientation (Portrait or Landscape).
- Specify page margins by entering the required top, left, bottom and right page margin values into the appropriate editors.

Scaling

To scale a document, click the **Scale**  button on the Print Preview's toolbar.

This invokes the **Scale** dialog.



The dialog provides two ways for scaling the document.

- **Scaling by entering a zoom factor.**

Select the first option and set the required percentage value in the dedicated editor.

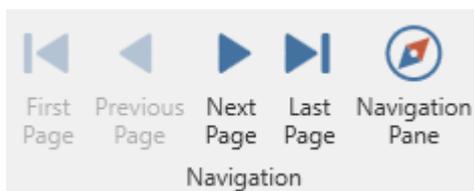
- **Scaling to fit into X pages.**

Choose the second option and specify the required number of pages.

Click **OK** to save changes and close the dialog.

Navigating

A set of navigation tools are available for you to find and display the areas of the report you want to review.



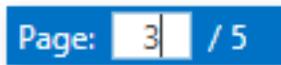
Navigate Between Pages

To navigate between document pages, use the scrollbars or navigation buttons on the Report Viewer's toolbar. These buttons allow you to switch to the first, previous,

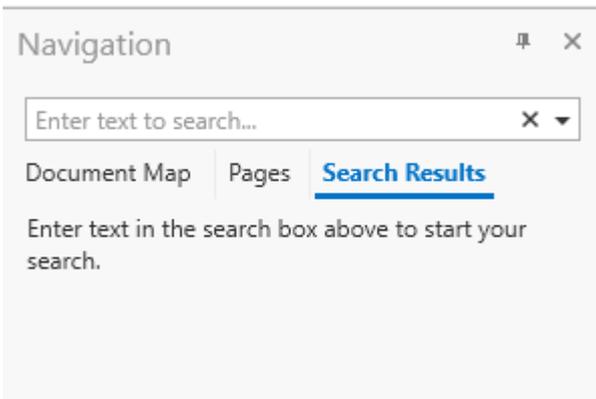
next, or last page of a document.



To navigate to a specific page of a document, enter the required page in the dedicated editor in the Print Preview's status bar.



Using the Navigation Pane

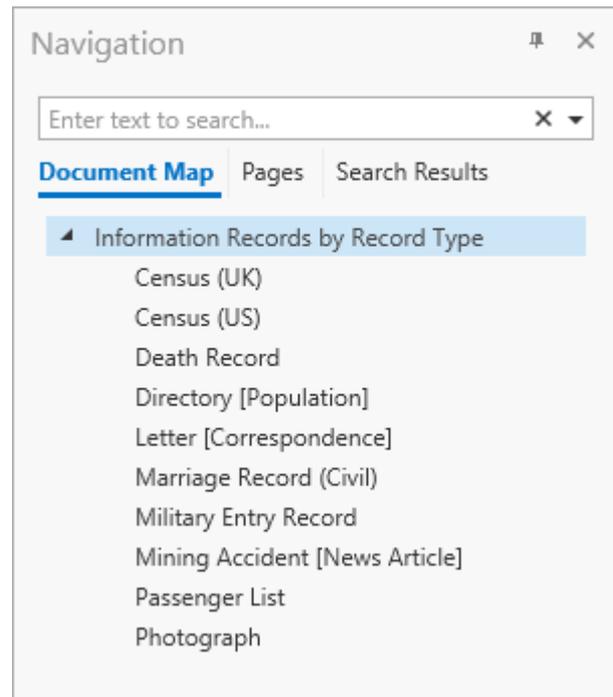


To toggle (on/off) the display of the **Navigation Pane** on the left side of the Report Viewer, click the **Navigation**

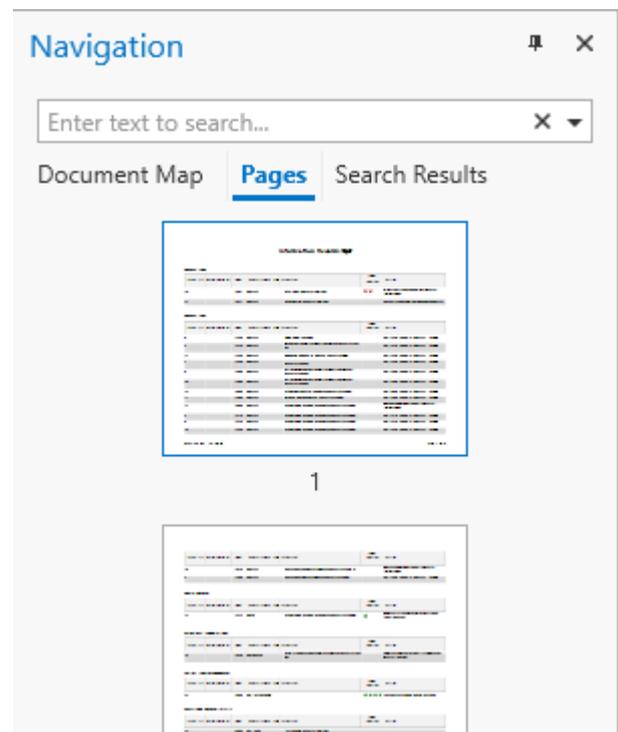
Pane  button on the Report Viewer's toolbar.

Use the **Document Map** to locate specific places in the report using bookmarks. Reports that group categories usually have bookmarks set for each of the grouped items. Most reports in Clooz have bookmarks, but not all.

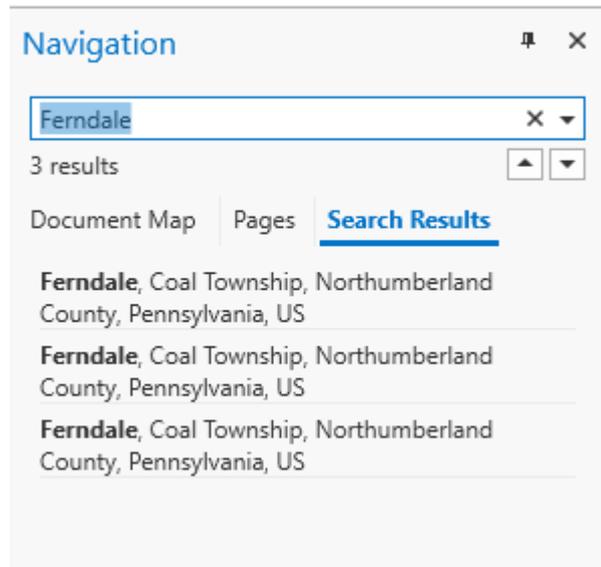
Click on one of the bookmarks to move to the location in the report corresponding to that bookmark.



The **Pages** feature displays a thumbnail of each page of the report. Click on a thumbnail to go to that page in the report.



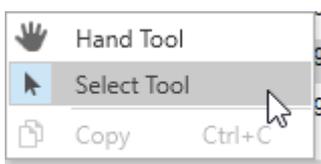
To **search** for a specific text throughout a document, enter it in the search box on the Navigation Pane. Then click on one of the search results to go to that place in the report.



Navigate Using the Hand Tool

The **Hand Tool** enables you to scroll content by dragging the report document instead of using scrollbars.

To activate the Hand Tool, right-click anywhere within the document, and in the invoked context menu, select **Hand Tool**.

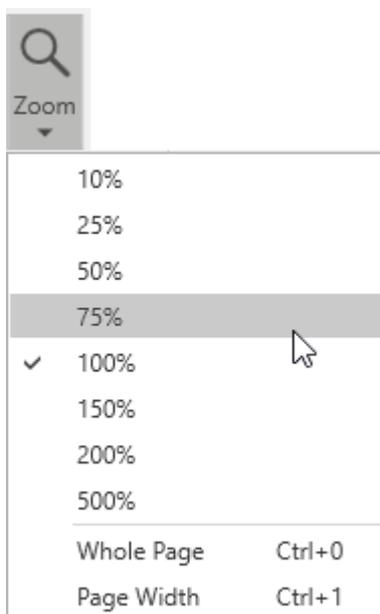


Then, after you click a document's page, the mouse pointer is changed from  to  (signifying you have grabbed the page). Drag the mouse pointer to scroll the report document and then release the mouse button after you have the report document positioned.

Zooming

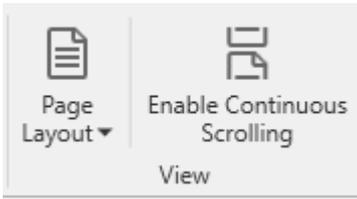
To zoom in or out a document, click the **Zoom In**  or **Zoom Out**  button on the Report Viewer's ribbon control. The alternative way to zoom in and out the document is to hold down CTRL and rotate the mouse wheel.

You can also zoom the document to a specific zoom factor. To do this, click the **Zoom** button and choose one of the zoom factor presets from the invoked list.

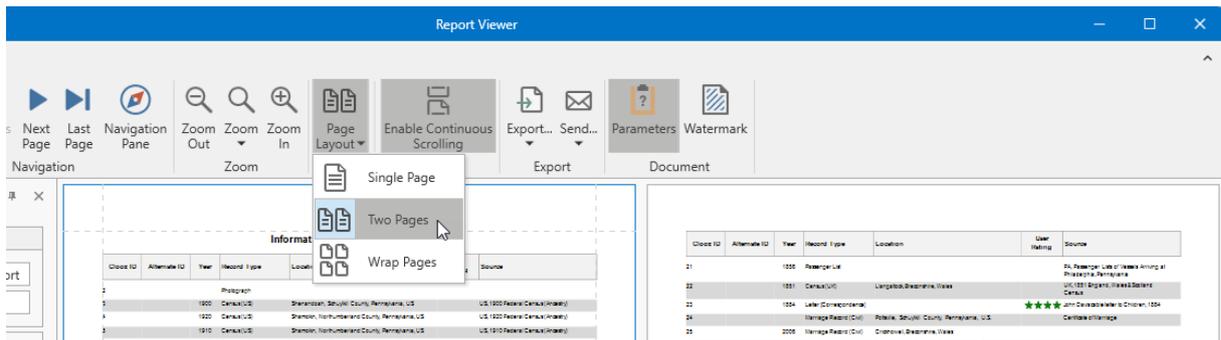


In addition, this list provides items allowing you to display one whole page at a time and fit the document to the page width. If the preview window will be resized later, the current zoom factor will also be changed in order to fit one page or the current page width, respectively.

View Control



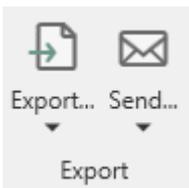
The **Page Layout** button drops down a menu giving you a choice of how many report pages to display in the viewer at one time.



The **Enable Continuous Scrolling** button toggles the scrolling to either be continuous (page breaks smoothly scroll through the display), or when disabled, scrolling will jump to the top of the next page once the bottom of the page being scrolled becomes visible. The **Enable Continuous Scrolling** button is highlighted when enabled.

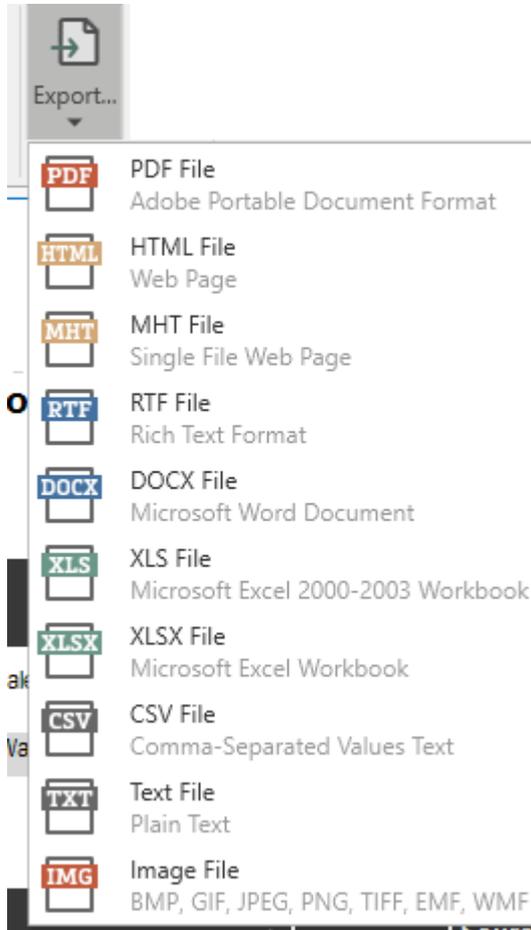
Exporting

There are two options available for exporting a document to one of the supported third-party formats.

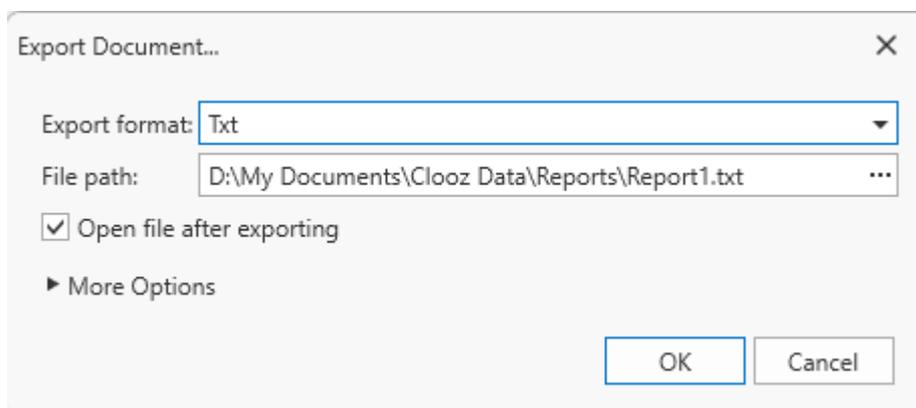


Export Document to a File on Disk

To export a document and save the resulting file on your hard drive, click the arrow for the **Export...** button and select the required format from the list.



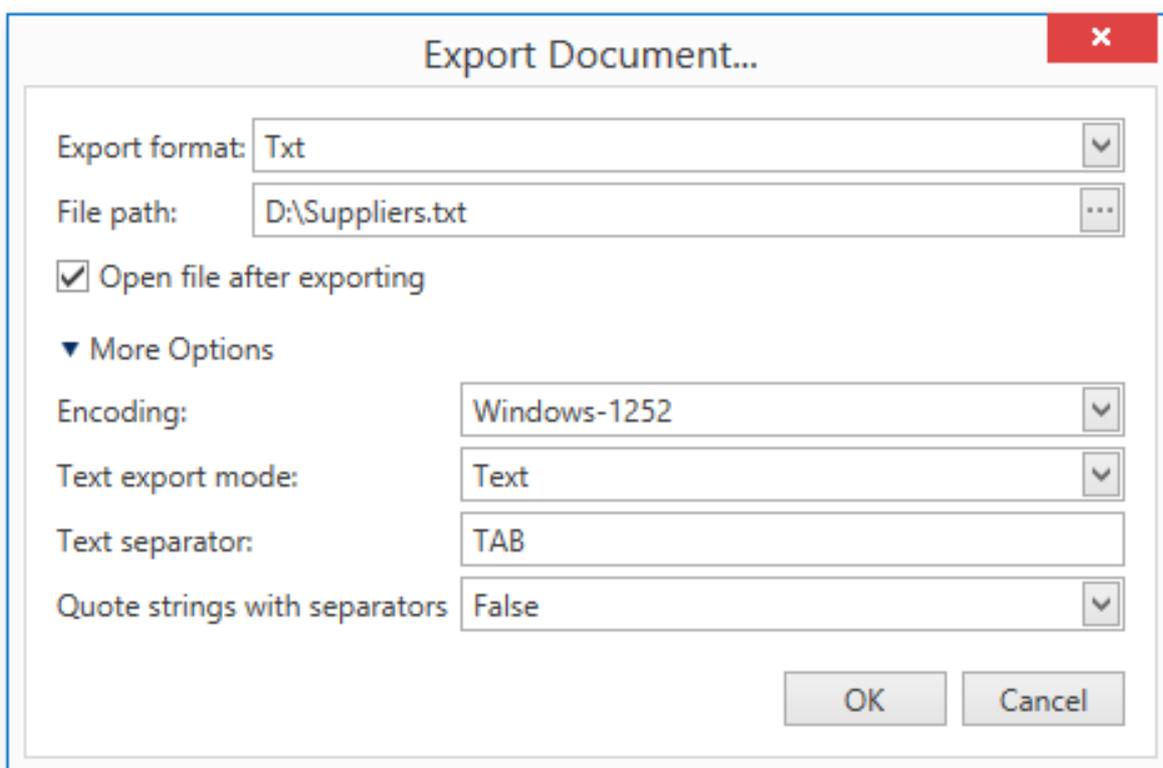
This invokes the **Export Document...** dialog with options for the selected format.



If you simply click the **Export...** button, the dialog will provide settings for the PDF format. Then, you can always change the export format directly in the dialog using the dedicated **Export format** drop-down list.

In the **Export Document...** dialog, you should specify the path where the resulting file should be saved and choose whether or not to open the file after exporting.

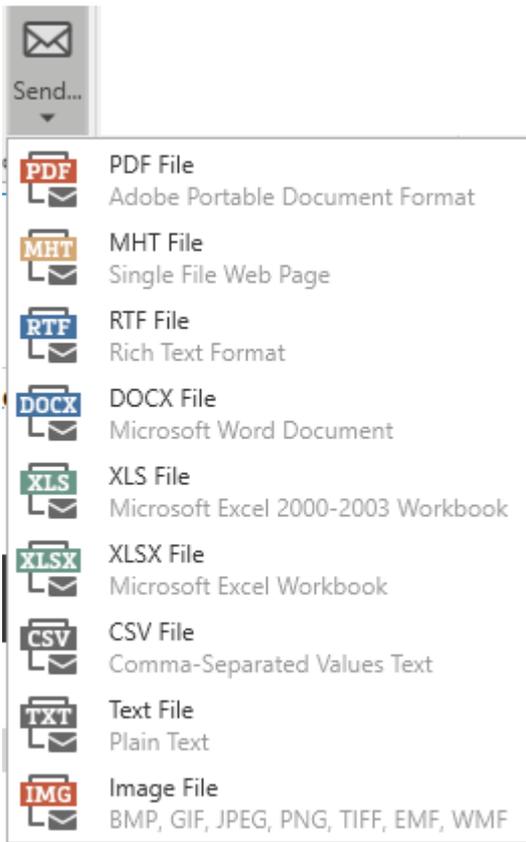
To access and customize advanced export options for the selected format, click the **More Options** link.



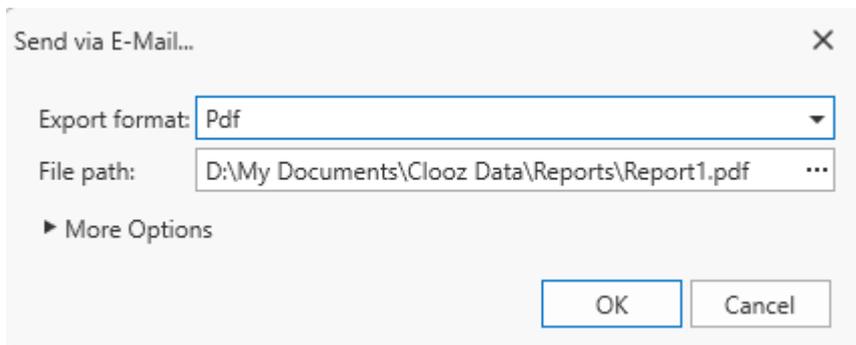
Specify the required format-specific options and click **OK** to initiate export of a report and save the resulting file.

Send Exported File Using E-Mail

To export a document and send the resulting file using e-mail, click the arrow for the **Send...** button and select one of the supported formats.



This invokes the **Send via E-Mail...** dialog with options for the selected format.



If you simply click the **Send...** button, the dialog will provide settings for the PDF format. Then, you can always change the export format directly in the dialog using the dedicated **Export Format** drop-down list.

In the **Send via E-Mail...** dialog, you should specify the path where the resulting file should be saved. The dialog also allows you to specify advanced export options for

the selected format. To access and customize these format-specific options, click the **More Options** link.

Specify the required options and click **OK** to initiate export of a report and save the resulting file. The saved file will be then attached to a new empty message in the default mail program.

Copying to the Clipboard

Besides exporting a document to a third-party formatted file, you can copy a portion of the document content to the clipboard, and paste it into an editor compatible with one of the supported third-party formats.

To copy document content to the clipboard, do the following.

1. Select the content of the report document by holding down the left mouse button and dragging the mouse pointer. The selected document elements are highlighted.
2. To copy the selected content, press CTRL+C or right-click anywhere within the highlighted area of the document, and select **Copy** in the context menu.

When pasted to a third-party editor from the clipboard, the report content will automatically be converted to the target format.

PDF-Specific Export Options

When exporting a document, you can define the following PDF-specific export options.

Export Document... X

Export format: Pdf

File path: D:\My Documents\Clooz Beta Data\Reports\Report1.pdf ...

Open file after exporting

▼ More Options

Page range:

Don't embed these fonts:

Export editing fields to AcroForms: False

PDF/A compatibility: None

PDF/UA compatibility: None

Rasterize Images: False

Rasterization Resolution: 96

Convert images to JPEG: True

Image quality: Highest

Password security: (none) ...

Digital signature: (none) ...

Application:

Author:

Keywords:

Subject:

Title:

OK Cancel

General Options

- **Page range**

Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

- **Don't embed these fonts**

Specifies font names which should not be embedded into the resulting file to reduce the file size. To separate fonts, use semicolons.

- **Convert Images to Jpeg**

Specifies whether all bitmaps contained in the document should be converted to JPEG format during export to PDF.

- **Images quality**

Specifies the document's image quality level. The higher the quality, the bigger the file, and vice versa.

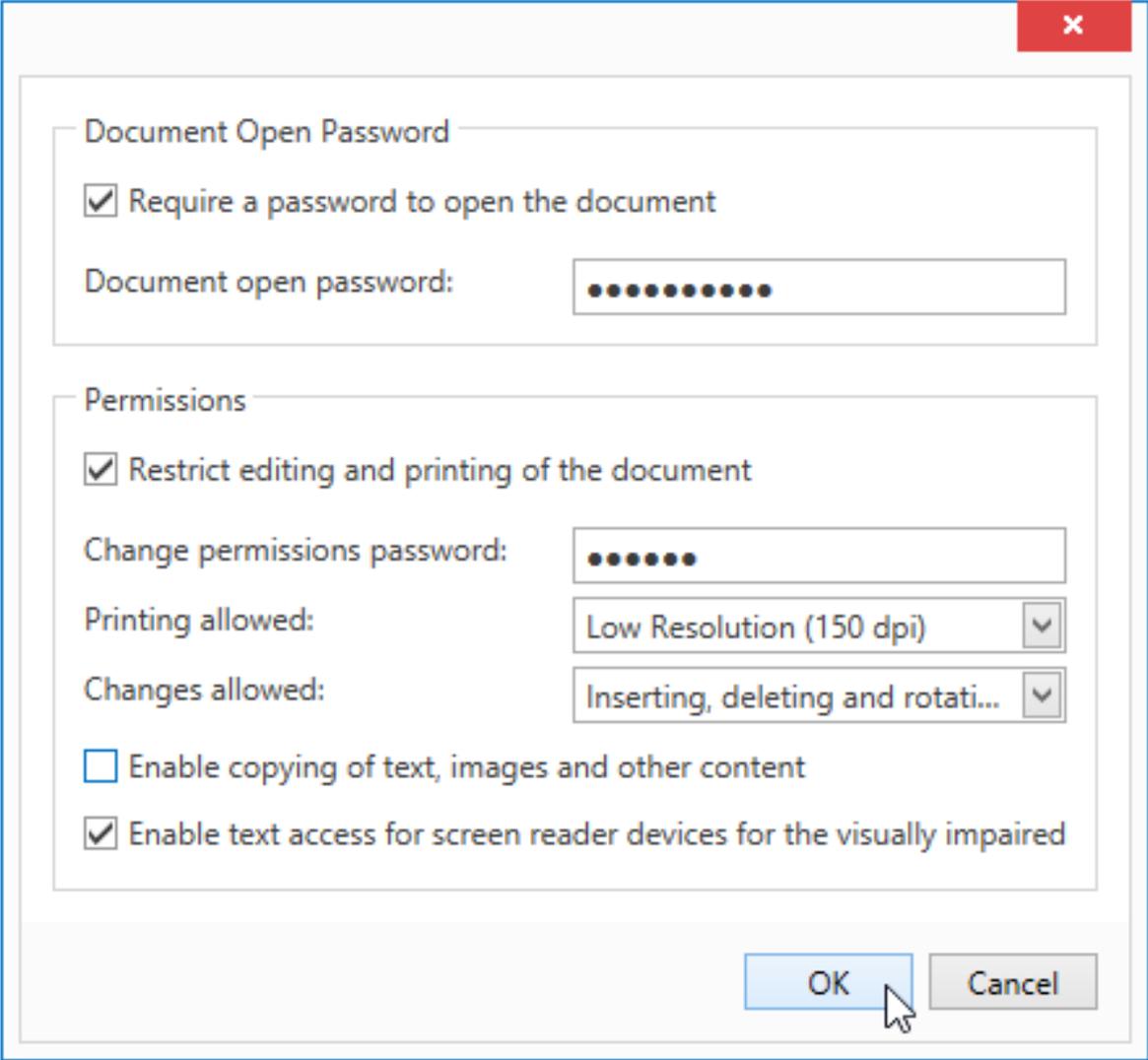
- **Compressed**

Specifies whether the resulting file should be compressed.

- **PDF/A-2b**

Specifies whether to enable document compatibility with the **PDF/A-2b** specification.

Password Security Options



The image shows a dialog box with a red close button in the top right corner. It is divided into two main sections:

- Document Open Password:**
 - Require a password to open the document
 - Document open password: [password field with 10 dots]
- Permissions:**
 - Restrict editing and printing of the document
 - Change permissions password: [password field with 6 dots]
 - Printing allowed: [Low Resolution (150 dpi) dropdown]
 - Changes allowed: [Inserting, deleting and rotati... dropdown]
 - Enable copying of text, images and other content
 - Enable text access for screen reader devices for the visually impaired

At the bottom right, there are two buttons: "OK" (highlighted in blue) and "Cancel". A mouse cursor is pointing at the "OK" button.

These options allow you to adjust the security options of the resulting PDF file (e.g. enable open document, editing, printing and copying protection, and specify what changes are allowed).

Signature Options

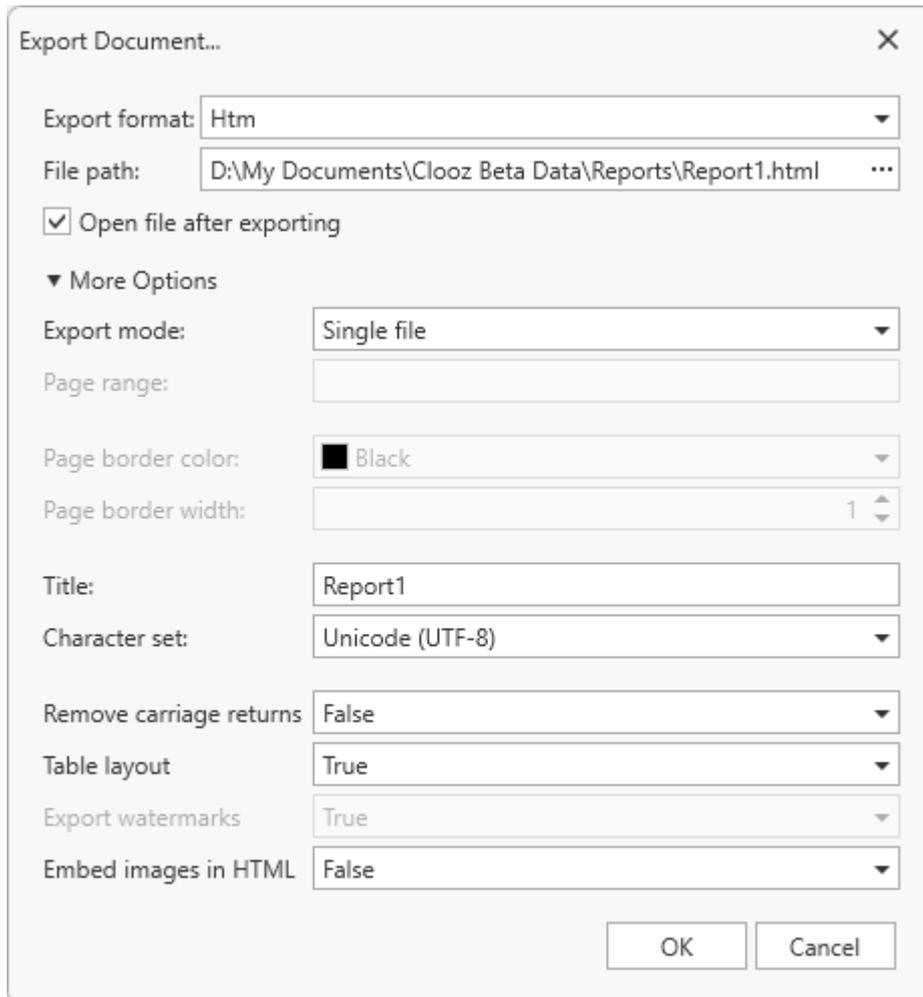
If an X.509 certificate is applied to your report, you can maintain its options using the **Signature Options** property of the report **PDF Export Options**.

Additional Options

You can also fill the **Application**, **Author**, **Keywords**, **Subject**, and **Title** fields. These options specify the **Document Properties** of the created PDF file.

HTML-Specific Export Options

When exporting a document, you can define the following HTML-specific export options.



- **Export Mode**

Specifies how a document is exported to HTML. The following modes are available.

- The **Single file** mode allows export of a document to a single file, without preserving the page-by-page breakdown.

- The **Single file page-by-page** mode allows export of a document to a single file, while preserving page-by-page breakdown. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.
- The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.

- **Page range**

Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

- **Page border color**

Specifies the color of page borders from the available palettes.

- **Page border width**

Specifies the width (in pixels) of page borders.

- **Title**

Specifies the title of the created document.

- **Character set**

Specifies the character set for the HTML document.

- **Remove carriage returns**

Specifies whether to remove carriage returns.

- **Table layout**

Specifies whether to use table or non-table layout in the resulting document.

- **Export watermarks**

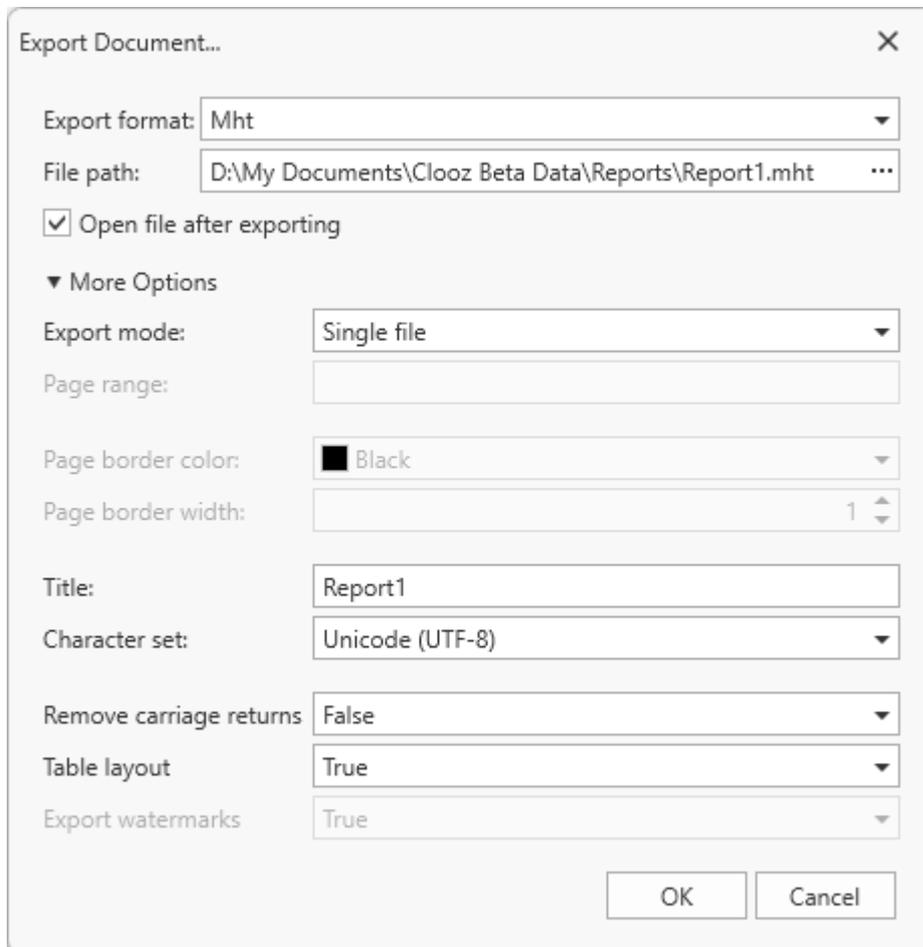
Specifies whether to export watermarks to HTML along with the remaining document content.

- **Embed images in HTML**

Specifies whether to embed images in HTML content.

MHT-Specific Export Options

When exporting a document, you can define the following MHT-specific export options.



- **Export mode**

Specifies how a document is exported to MHT. The following modes are available.

- The **Single file** mode allows export of a document to a single file, without dividing it into pages.
- The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.
- The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.

- **Page range**

Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

- **Page border color**

Specifies the color of page borders from the available palettes.

- **Page border width**

Specifies the width (in pixels) of page borders.

- **Title**

Specifies the title of the created document.

- **Character set**

Specifies the character set for the HTML document.

- **Remove carriage returns**

Specifies whether to remove carriage returns.

- **Table layout**

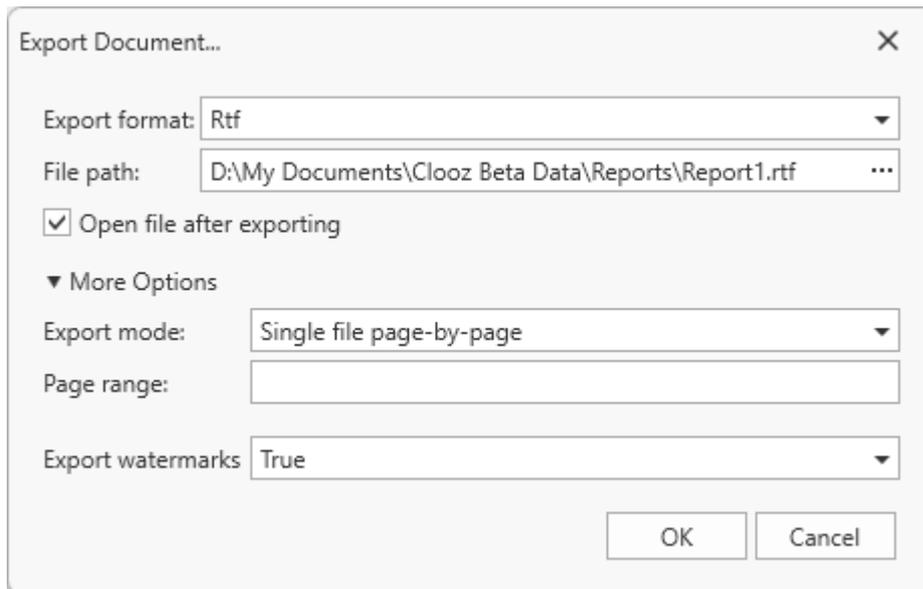
Specifies whether to use table or non-table layout in the resulting document.

- **Export watermarks**

Specifies whether to export watermarks to HTML along with the remaining document content.

RTF-Specific Export Options

When exporting a document, you can define the following RTF-specific exporting options.



- **Export mode**

Specifies how a document is exported to RTF. The following modes are available.

- The **Single file** mode allows export of a document to a single file, without dividing it into pages.

- The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range** option is available.

- **Page range**

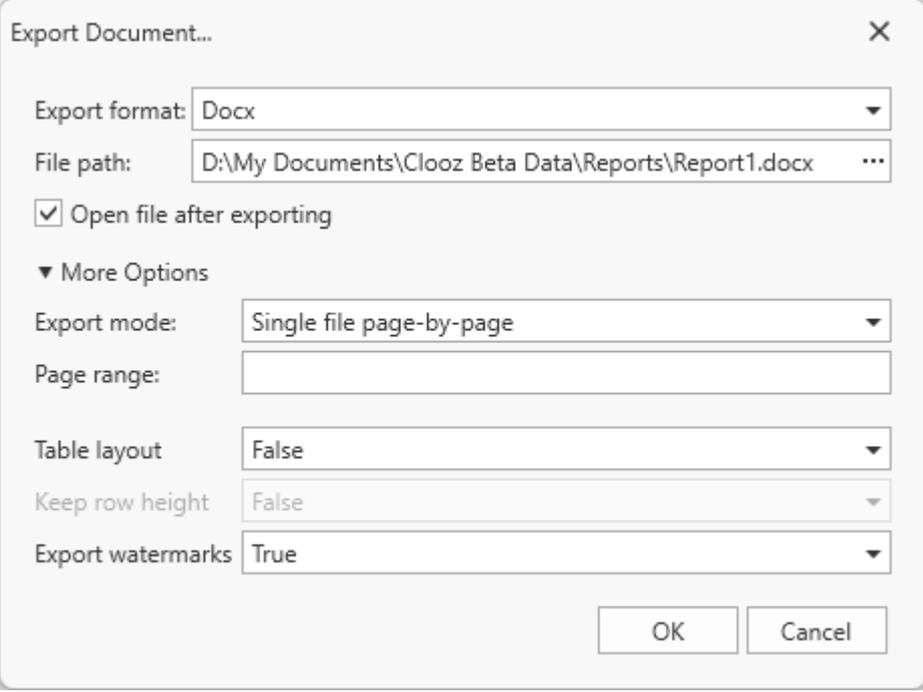
Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

- **Export watermarks**

Specifies whether the exported document should include watermarks (if they exist).

DOCX-Specific Export Options

When exporting a document, you can define DOCX-specific export options using the following dialog:



The screenshot shows a dialog box titled "Export Document...". It contains the following fields and options:

- Export format:** A dropdown menu set to "Docx".
- File path:** A text box containing "D:\My Documents\Clooz Beta Data\Reports\Report1.docx" and a browse button (three dots).
- Open file after exporting**
- More Options:** A collapsed section containing:
 - Export mode:** A dropdown menu set to "Single file page-by-page".
 - Page range:** An empty text box.
 - Table layout:** A dropdown menu set to "False".
 - Keep row height:** A dropdown menu set to "False".
 - Export watermarks:** A dropdown menu set to "True".
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

- **Export mode**

Specifies how a document is exported to DOCX. The following modes are available.

- The **Single file** mode allows export of a document to a single file without dividing it into pages.
- The **Single file page-by-page** mode allows export of a document to a single file divided into pages. In this mode, the **Page range** option is available.

- **Page range**

Specifies a range of pages which will be included in the resulting file. Use commas to separate page numbers. Use hyphens to set page ranges.

- **Export watermarks**

Specifies whether the exported document should include watermarks (if they exist).

XLS-Specific Export Options

When exporting a document, you can define the following XLS-specific exporting options.

Export Document... X

Export format: Xls

File path: D:\My Documents\Clooz Beta Data\Reports\Report1.xls ...

Open file after exporting

▼ More Options

Export mode: Single file

Page range:

Sheet name: Sheet

Text export mode: Value

Show grid lines: False

Export hyperlinks: True

Raw data mode: False

OK Cancel

- **Export mode**

Specifies how a document is exported to XLS. The following modes are available.

- The **Single file** mode allows export of a document to a single file, without dividing it into pages.
- The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range** option is available.
- The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range** option is available.

- **Page range**

Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

- **Sheet name**

Specifies the name of the sheet in the created XLS file.

- **Text export mode**

Specifies whether value formatting should be converted to the native XLS format string (if possible), or embedded into cell values as plain text.

- **Show grid lines**

Specifies whether grid lines should be visible in the resulting XLS file.

- **Export hyperlinks**

Specifies whether hyperlinks should be exported to the XLS document.

- **Raw data mode**

Specifies whether to enable the raw data export mode. In this mode, only a document's actual data is exported to XLS, ignoring non-relevant elements, such as images, graphic content, font and appearance settings.

XLSX-Specific Export Options

When exporting a document, you can define the following XLSX-specific exporting options.

Export Document... X

Export format: Xlsx

File path: D:\My Documents\Clooz Beta Data\Reports\Report1.xlsx ...

Open file after exporting

▼ More Options

Export mode: Single file

Page range:

Sheet name: Sheet

Text export mode: Value

Show grid lines: False

Export hyperlinks: True

Raw data mode: False

OK Cancel

- **Export mode**

Specifies how a document is exported to XLSX. The following modes are available.

- The **Single file** mode allows export of a document to a single file, without dividing it into pages.
- The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range** option is available.
- The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range** option is available.

- **Page range**

Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

- **Sheet name**

Specifies the name of the sheet in the created XLSX file.

- **Text export mode**

Specifies whether value formatting should be converted to the native XLSX format string (if it is possible), or embedded into cell values as plain text.

- **Show grid lines**

Specifies whether grid lines should be visible in the resulting XLSX file.

- **Export hyperlinks**

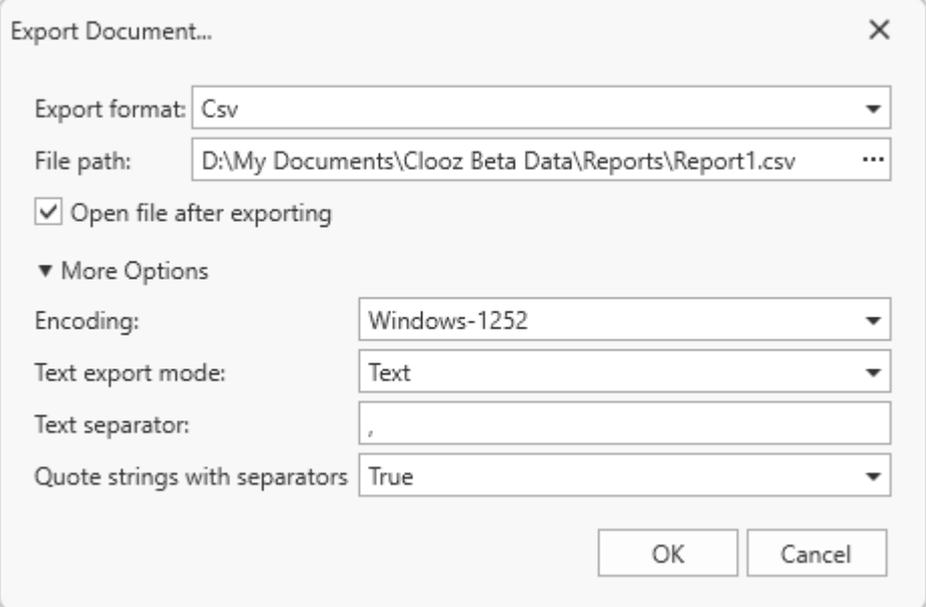
Specifies whether to include hyperlinks into the resulting file.

- **Raw data mode**

Specifies whether to enable the raw data export mode. In this mode, only a document's actual data is exported to XLSX, ignoring non-relevant elements, such as images, graphic content, font and appearance settings.

CSV-Specific Export Options

When exporting a document, you can define the following CSV-specific exporting options.



- **Encoding**

Specifies the encoding used in the exported document.

- **Text export mode**

Specifies whether to use the formatting of data fields in the bound data source for cells in the exported document. If this option is set to **Text**, all data fields are exported to the CSV file as strings with the corresponding formatting embedded into those strings. If the option is set to **Value**, all formatting will be lost in the resulting document.

- **Text separator**

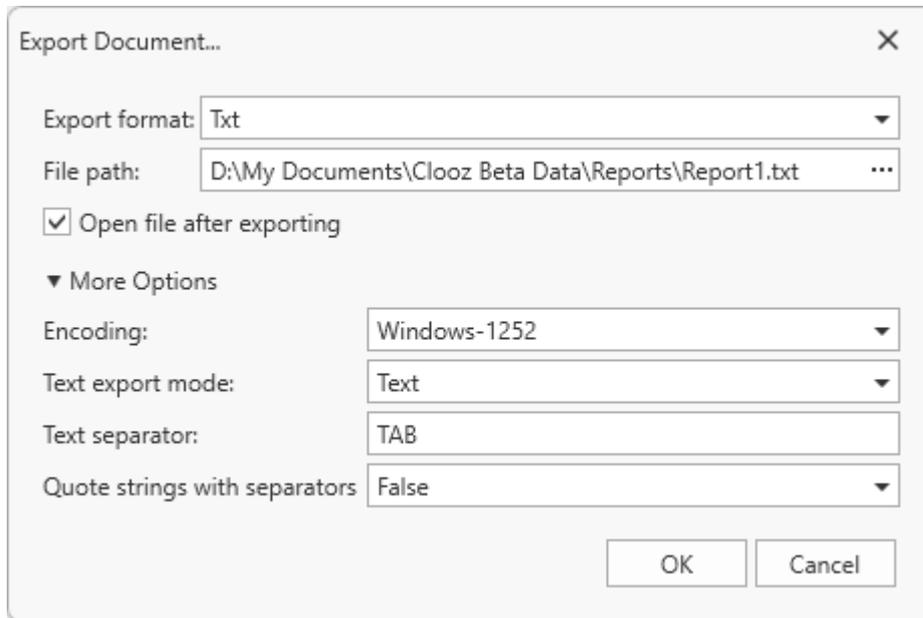
Specifies a symbol used to separate text elements (comma by default).

- **Quote strings with separators**

Specifies whether strings with separators should be placed in quotation marks in the exported document.

Text-Specific Export Options

When exporting a document, you can define the following TXT-specific exporting options.



- **Encoding**

Specifies the encoding used in the exported document.

- **Text export mode**

Specifies whether to use the formatting of data fields in the bound data source for cells in the exported document. If this option is set to **Text**, all data fields are exported to the text file as strings with the corresponding formatting embedded into those strings. If the option is set to **Value**, all formatting will be lost in the resulting document.

- **Text separator**

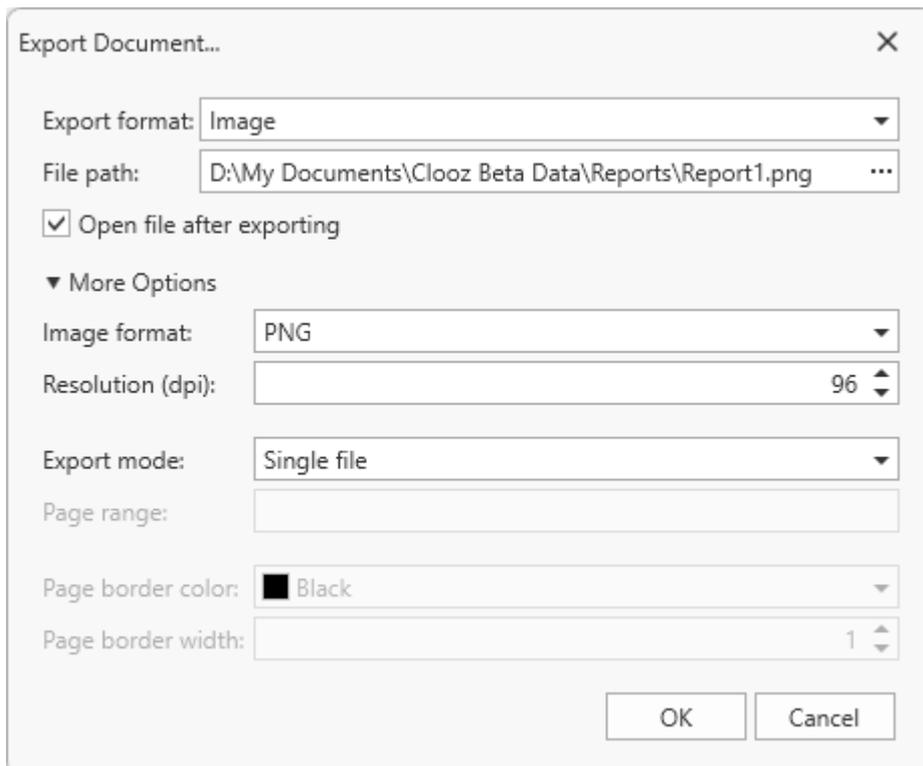
Specifies a symbol to separate text elements (TAB by default).

- **Quote strings with separators**

Specifies whether strings with separators should be placed in quotation marks in the exported document.

Image-Specific Export Options

When exporting a document, you can define the following Image-specific exporting options.



- **Image format**

Specifies an image format to export a document. Available formats are BMP, EMF, WMF, GIF, JPEG, PNG, and TIFF.

- **Resolution (dpi)**

Specifies the required image resolution (in dpi).

- **Export mode**

Specifies how a document is exported to an image. The following modes are available.

- The **Single file** mode allows export of a document to a single file, without dividing the output into pages.
- The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.
- The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.

- **Page range**

Specifies a range of pages which will be included in the resulting file. To separate page numbers, use commas. To set page ranges, use hyphens.

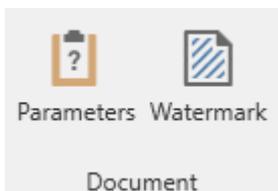
- **Page border color**

Specifies the color of page borders.

- **Page border width**

Specifies the width (in pixels) of page borders.

Document Control

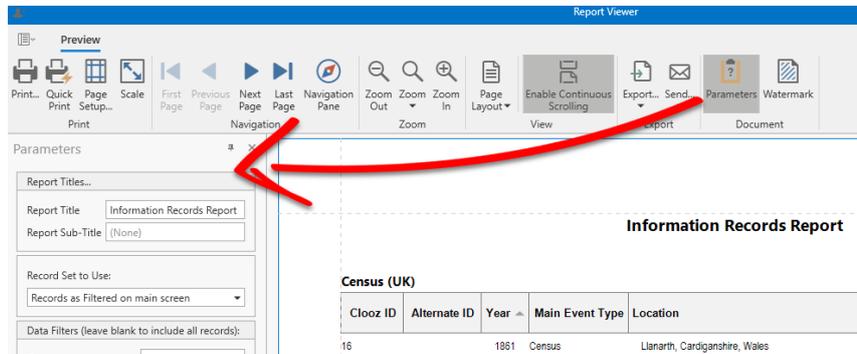


Show/Hide the Parameters Panel

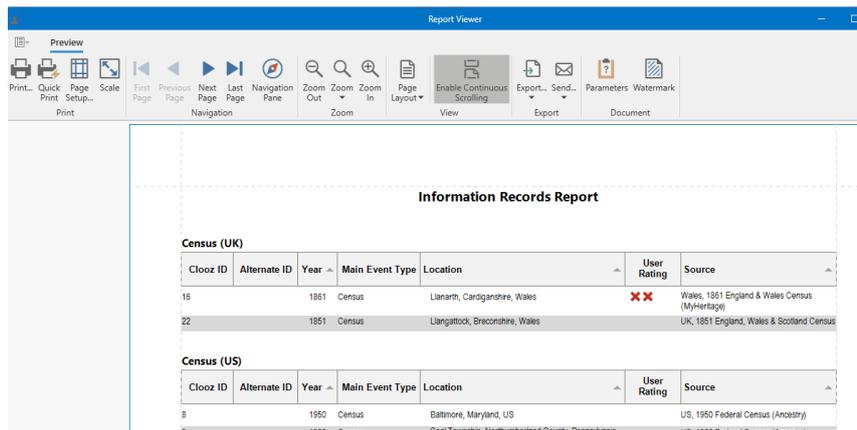
The Parameters panel is where you work with the options supported by each report related to the data to be used and how it will appear. Those operations are discussed separately.

The sole function of the Parameters button in the ribbon is to control whether the panel will appear on the left side of the Report Viewer, or be removed to make more screen space for the report itself. The default state when the Report Viewer first appears is to show the panel.

When the panel is enabled, the button will be highlighted.



Here the panel is hidden.



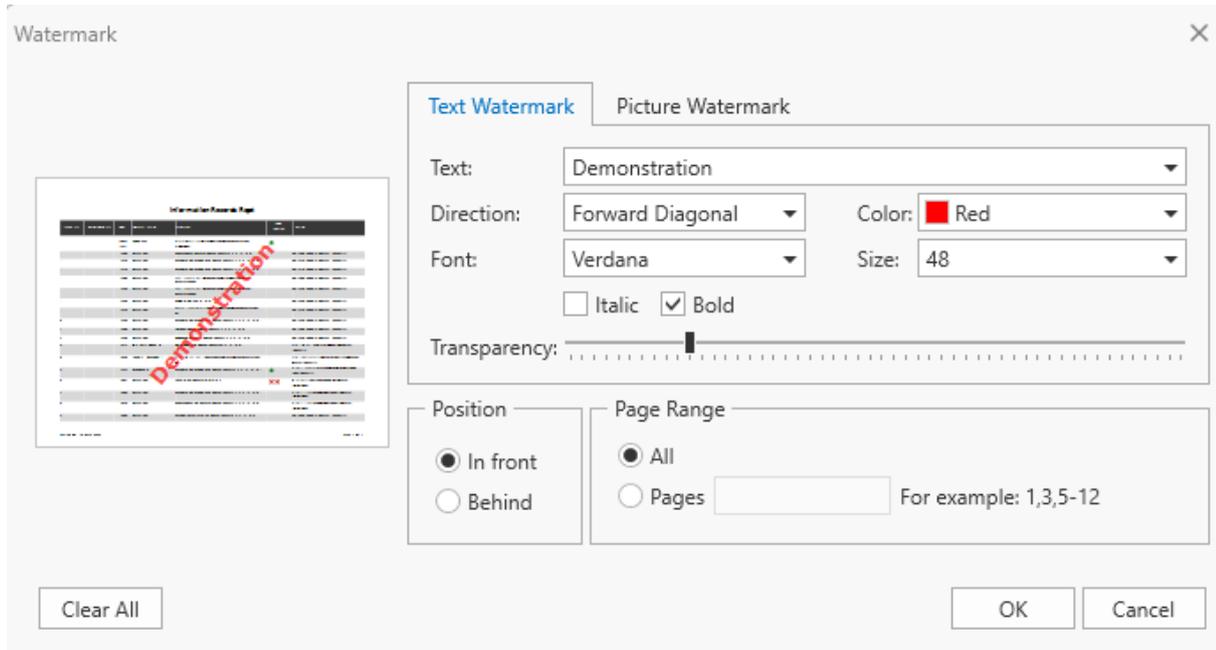
Changing a Watermark

With the Report Viewer, you can add a text watermark in a document, or turn a picture into a document's background. It is also possible to use both textual and image watermarks simultaneously.

To invoke the **Watermark** dialog, click the **Watermark**  button on the toolbar.

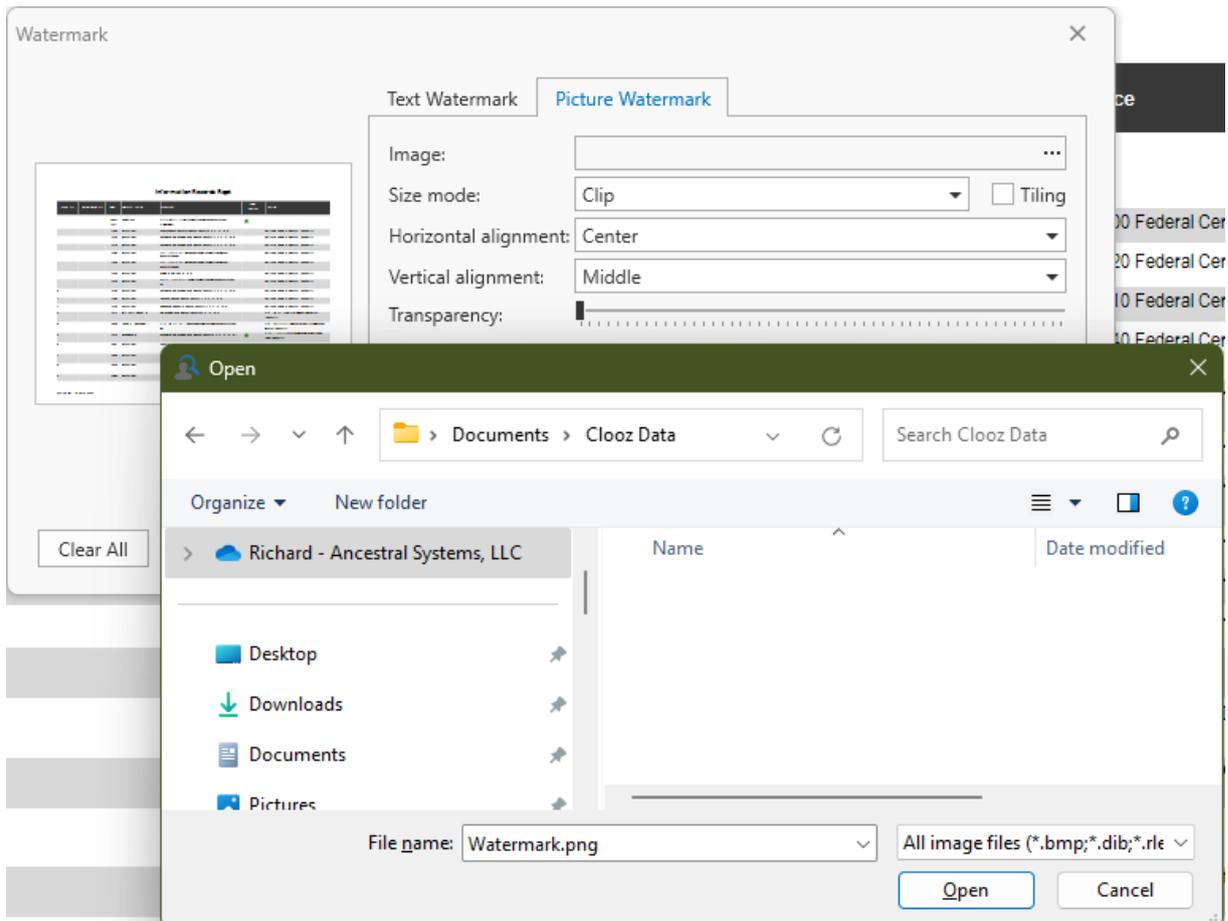
Adding a Text Watermark

To add a text watermark, open the **Text Watermark** tab. Input the required watermark's text or choose one of the provided options in the **Text** drop-down list. Then, define other text properties, such as direction, color, font, size, transparency, etc.



Adding an Image Watermark

To add a picture watermark, switch to the **Picture Watermark** tab. To load the image to be used as a watermark, click the ellipsis button for the **Image** property. In the invoked dialog, select the file containing the image that you wish to load and click **Open**.



Then, you can specify the picture's properties, such as the size mode, alignment, transparency, etc.

Specifying Watermark Properties

At the bottom of the **Watermark** dialog, you can select a watermark position behind or in front of the document, and specify the page range in which the watermark will be printed.

These settings are in effect both for text and image watermarks.

Removing a Watermark

To remove watermarks from a document, click **Clear All** in the **Watermark** dialog. Then, click **OK** to save changes and close the dialog.

Report Viewer Parameters Panel

The parameters panel is perhaps the most important part of the Report Viewer, and certainly where you will spend most of your time. The parameter fields for each of the reports vary a bit depending on what data type is being reported and the report layout chosen. However, there is some commonality between the reports since most have some form of the following:

- Report titling,
- Records to be included,
- Data filters to further customize which records get included, and
- Display and report options.

Parameters

Report Titles...

Report Title: Information Records Report

Report Sub-Title: (None)

Records Set to Use:

Records as Filtered on main screen

Data Filters (leave blank to include all records):

Country: [Dropdown]

Country-State/Province: [Dropdown]

Country..County: [Dropdown]

Years: [Dropdown]

Record Types: [Dropdown]

Display Options:

Include Description Field: No

Include Remarks: No

Reset Submit



Please Note: When you make changes to any of the fields in the Parameters panel, you must click OK in any of the dropdowns to have the value be changed, and none of the changes will be applied to the report until you click the **Submit** button.

Record Types: [Dropdown]

Display Options:

Include Description Field: No [Dropdown]

Include Remarks: No [Dropdown]

[Reset] [Submit]

Customizing Report Titles

You can change, add, or delete a title and/or sub-title for the report using the Report Titles fields on the Parameters panel.

Parameters

Report Titles...

Report Title: Information Records Report

Report Sub-Title: Sub-Title Goes Here

Enter the desired text (or delete the text to eliminate a title), and then click the Submit button on the Parameters panel.

The title and sub-title are added to the report at the top of the first page.

Information Records Report

Sub-Title Goes Here

IP	User	...
----	-----	-----	-----	-----	-----	------	-----

Selecting Records to Include in Reports

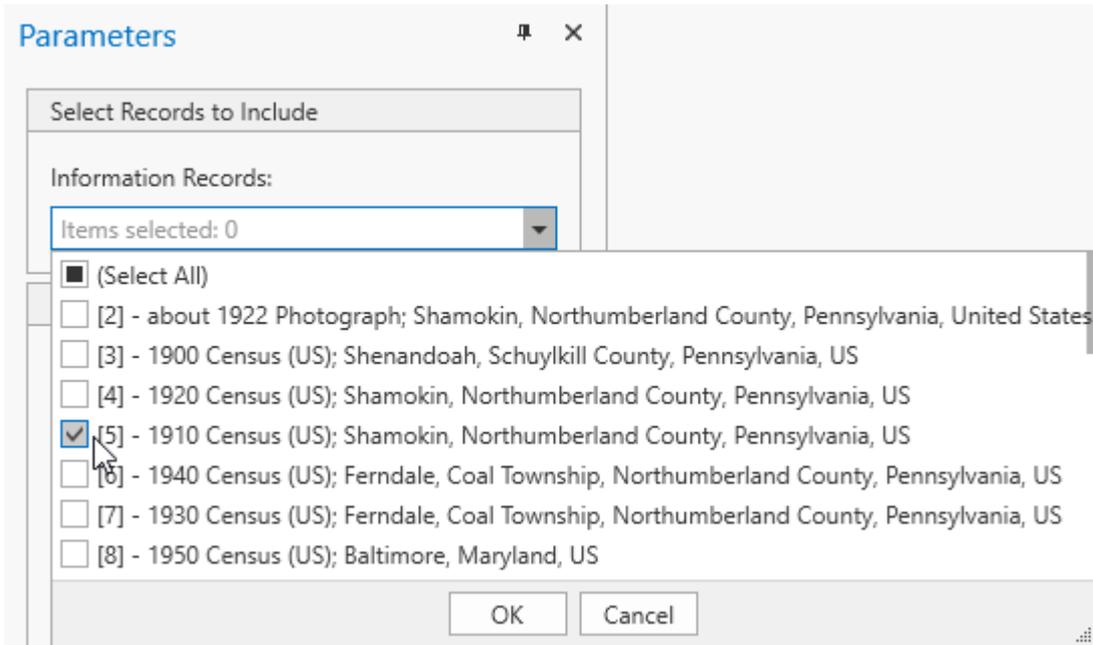
The set of records used to generate a report depends on how the request was made.

If a report request was made from...	Data Records Available	Report Layouts Supported
Record Editor	Single record	Individual Record style only
Main screen list of records	All records appearing in list (could be filtered)	Individual Record style or List
List on Reports tab	All records of that type	Any style available

Selecting Records to Include in Individual Record Reports

When the Report Viewer first appears, a report will be immediately generated if an implied record selection has been made (the report was requested from a record editor or selected from the list of records on the main screen of Clooz). Otherwise, you will see a message that parameter values must be submitted first.

To make or change the selection of records, click the arrow on the right side of the control to see the drop down list of all available records that can be included in the report (which is dependent upon where the report request was made; see section above). Check the boxes for those records to include, and then click OK. The report will not be generated until you click the Submit button on the parameters panel, allowing you to make other adjustments first.



The screenshot shows a 'Parameters' dialog box with a 'Select Records to Include' section. Under 'Information Records', there is a dropdown menu showing 'Items selected: 0'. Below this is a list of records with checkboxes:

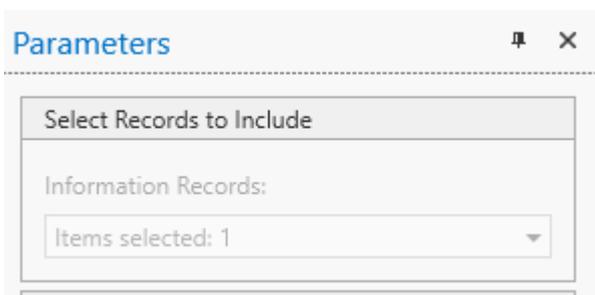
- (Select All)
- [2] - about 1922 Photograph; Shamokin, Northumberland County, Pennsylvania, United States
- [3] - 1900 Census (US); Shenandoah, Schuylkill County, Pennsylvania, US
- [4] - 1920 Census (US); Shamokin, Northumberland County, Pennsylvania, US
- [5] - 1910 Census (US); Shamokin, Northumberland County, Pennsylvania, US
- [6] - 1940 Census (US); Ferndale, Coal Township, Northumberland County, Pennsylvania, US
- [7] - 1930 Census (US); Ferndale, Coal Township, Northumberland County, Pennsylvania, US
- [8] - 1950 Census (US); Baltimore, Maryland, US

At the bottom of the dialog are 'OK' and 'Cancel' buttons.



Reports using the Individual Record style layout require more computer resources and pages in the resulting report. Therefore, these reports can only be generated for a specific set of one or more records, and should not be used for a large number of records. There are no automatic default selections of all records.

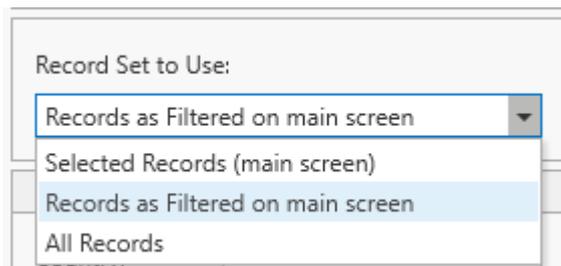
When the report request was made from a record editor, only that record can be used in the report. Therefore, the record selection field is disabled.



The screenshot shows the 'Parameters' dialog box with the 'Select Records to Include' section. The 'Information Records' dropdown menu now shows 'Items selected: 1'. The list of records and checkboxes is visible but appears to be disabled or faded.

Selecting Record Sets to Use in List Reports

List style reports are setup to display larger numbers of records. It is presumed that you don't want to use them for a single record, so reports of this type are not offered when requesting reports from the record editors. Once in the Report Viewer, selection of specific records is not provided. Instead, you can select the record set to be used.



The set of records to be listed in the report can be one of three types:

- Selected Records (main screen)

The records selected on the main screen when requesting the report will be what appears in the report.

Info Record ID	Personal File ID	Document Type	Event Type	Year
2		Photograph	None	about
3		Census (US)	Census	19
4		Census (US)	Census	19
5		Census (US)	Census	19
6		Census (US)	Census	19
7				19
8				19
9				19
10				19
11				19

- Records as Filtered

All of the records visible in the list on the main screen will be included in the report. If a filter was active on the main screen, only those filtered records will be in the report. If no filter was active, all records will be in the report.

- All Records

All records of that data type will be included in the report, even if a filter was active on the main screen.



The selection last made for that report type will be used again the next time a report of that same type is requested.

This setting can be changed at any time the report is being viewed by selecting a different choice and clicking the Submit button in the Parameters panel.

Additional Report Details

Some report types have options for controlling the display of additional lists (sub-reports to each of the main records). This is more common with the Individual Record style reports showing other records associated with the main record.

The Parameters panel includes fields for each of these optional data types. Select Yes if the data item is to included in the report, or No to leave it out.

The screenshot shows the 'Parameters' panel on the left and the 'Events' report on the right. In the Parameters panel, under 'Select Additional Details', the 'Events' option is selected with a red circle. A red arrow points from this circle to the 'Events' section of the report. The report displays three event entries for William E Thomas: Birth, Residence, and Occupation. Each entry includes a table with columns for Name in record, Role/Relationship, Principal?, and Confidence Rating.

Event Type	Primary Subject(s)	Event Date	Description	Confidence Rating	Last Updated												
Birth	William E Thomas	Bet Apr 1890 and Apr 1891			16 Jul 2022												
Location: Pennsylvania																	
<table border="1"><thead><tr><th>Name in record</th><th>Role/Relationship</th><th>Principal?</th><th>Confidence Rating</th></tr></thead><tbody><tr><td>William E Thomas</td><td>Principal</td><td><input checked="" type="checkbox"/></td><td></td></tr><tr><td colspan="4">Notes: Sheet labeled as 'Out of Order'.</td></tr></tbody></table>						Name in record	Role/Relationship	Principal?	Confidence Rating	William E Thomas	Principal	<input checked="" type="checkbox"/>		Notes: Sheet labeled as 'Out of Order'.			
Name in record	Role/Relationship	Principal?	Confidence Rating														
William E Thomas	Principal	<input checked="" type="checkbox"/>															
Notes: Sheet labeled as 'Out of Order'.																	
Residence	William E Thomas	1 Apr 1950			16 Jul 2022												
Location: 925 Bedford Ave., Collingdale, Delaware County, Pennsylvania, US																	
<table border="1"><thead><tr><th>Name in record</th><th>Role/Relationship</th><th>Principal?</th><th>Confidence Rating</th></tr></thead><tbody><tr><td>William E Thomas</td><td>Principal</td><td><input checked="" type="checkbox"/></td><td></td></tr><tr><td colspan="4">Notes: Sheet labeled as 'Out of Order'.</td></tr></tbody></table>						Name in record	Role/Relationship	Principal?	Confidence Rating	William E Thomas	Principal	<input checked="" type="checkbox"/>		Notes: Sheet labeled as 'Out of Order'.			
Name in record	Role/Relationship	Principal?	Confidence Rating														
William E Thomas	Principal	<input checked="" type="checkbox"/>															
Notes: Sheet labeled as 'Out of Order'.																	
Occupation	William E Thomas	1 Apr 1950	Assembler (Electric Plant)		16 Jul 2022												
Location: Collingdale, Delaware County, Pennsylvania, US																	
<table border="1"><thead><tr><th>Name in record</th><th>Role/Relationship</th><th>Principal?</th><th>Confidence Rating</th></tr></thead><tbody><tr><td>William E Thomas</td><td>Principal</td><td><input checked="" type="checkbox"/></td><td></td></tr></tbody></table>						Name in record	Role/Relationship	Principal?	Confidence Rating	William E Thomas	Principal	<input checked="" type="checkbox"/>					
Name in record	Role/Relationship	Principal?	Confidence Rating														
William E Thomas	Principal	<input checked="" type="checkbox"/>															



The selection last made (Yes/No) for each data type will be used again the next time a report of that same type is requested.

This setting can be changed at any time the report is being viewed by selecting a different choice and clicking the Submit button in the Parameters panel.

Filtering Data Records

List-style report types will usually have options in the Parameters panel to filter the data going into the report. Filters define which data values must be matched in order for the record to be included.

The screenshot shows a dialog box titled "Data Filters (leave blank to include all records):". It contains several sections:

- Data Filters:** Five dropdown menus for "Country:", "Country-State/Province:", "Country..County:", "Years:", and "Record Types:". The "Record Types:" dropdown is open, showing a list of record types with checkboxes.
- Display Options:** Two checkboxes: "Include Description Field" and "Include Remarks:", both currently unchecked.
- Page:** A field showing "Page: 1 / 4".
- Buttons:** "OK" and "Cancel" buttons at the bottom.

The open "Record Types" dropdown list includes the following options:

- (Select All)
- Census (UK)
- Census (US)
- Death Record
- Directory [Population]
- Grave Marker Record(s)
- Letter [Correspondence]
- Marriage Record (Civil)
- Military Entry Record
- Mining Accident [News Article]
- Passenger List
- Photograph

For each data type, open the drop down list by clicking on the arrow and then check the boxes of those values you want the records to match.

If you want all records to be included, clear the selections in the filter field. (No filter will let all records be included.)



Blank fields with a check box indicate there were records that had no entry for this field. Checking this box will indicate you want to include records in the report for which this field was left blank. Do not check it if you are trying to indicate you do not want any filtering.

Parameters

Report Titles...

Report Title: Information Records Report

Report Sub-Title: (None)

Record Set to Use: Records as Filtered on main screen

Data Filters (leave blank to include all records):

Country: []

Country-State/Province: []

Country..County: []

Years:

- (Select All)
- U.S., Pennsylvania, Northumberland County
- U.S., Pennsylvania, Schuylkill County
- US, Maryland,
- US, Pennsylvania, Adams County
- US, Pennsylvania, Delaware County
- US, Pennsylvania, Luzerne County
- US, Pennsylvania, Northumberland County
- US, Pennsylvania, Schuylkill County
- USA, PA, Northumberland County
- USA, Pennsylvania, Schuylkill County
- Wales, Breconshire
- Wales, Cardiganshire

Display Options:

Include Description Field: []

Include Remarks: []

OK Cancel

Census (UK)

Clooz ID	Alterna
16	
22	

Census (US)

Clooz ID	Alterna
8	
9	
12	
7	
6	
26	
19	
11	

Report and Display Options

The report parameters panel may include some report or display options, affecting what is shown in the report for a particular record. These vary depending on the report layout and/or record type.



The settings of report and display options are persistent, meaning the next time you generate a report of the same type you will see the settings as they were left in the previous report.

Options for Individual Record Report Layouts

Reports using Individual Record layout can include options similar to these:

A screenshot of a 'Report Options' panel. It contains three dropdown menus: 'Thumbnail image size' set to 'Small', 'Include blank detail columns' set to 'No', and 'Combine place fields (details)' set to 'Yes'.

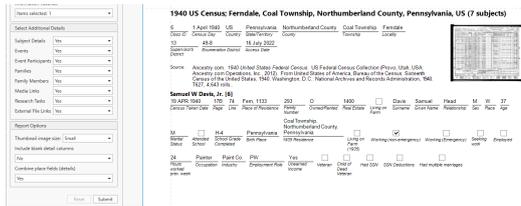
Report Options	
Thumbnail image size:	Small
Include blank detail columns	No
Combine place fields (details)	Yes

- **Thumbnail Image Size**

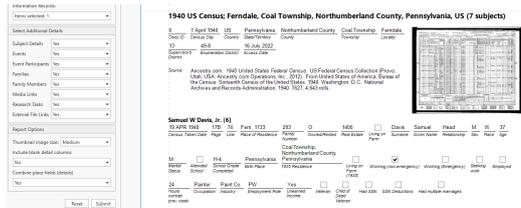
Individual Record layouts of Information Records, Sources, and Repositories include an option to display a thumbnail image of the primary media item (first item by default) if the record has attached media items. The image appears in the initial block of data for each record. There are six choices:

- **None** - No thumbnail is shown.
- **Tiny**

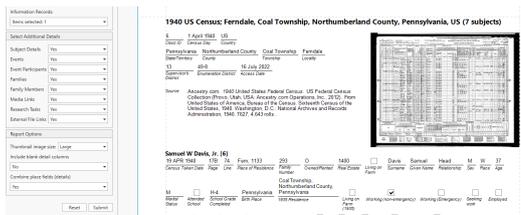
- **Small** - (the initial default setting) Here is an example:



- **Medium** - Here is an example:



- **Large** - Here is an example:



- **Huge**

- **Include blank detail columns** (Only applies to Information Records)

Subject-detail fields in Information Records which have blank values can be hidden from display (select No) to save space. This is applied uniquely to each subject's details in the Information Record, so it is possible a given detail field only is shown for some of the subjects within the same Information Record. The initial default setting is "No."

- **Combine place fields in the details** (Only applies to Information Records)

Subject-detail fields which are parts of a location sequence (country, state,

county, etc) can be combined into a single location field rather than having individual fields for each of the parts (as would appear in the Information Record editor templates). The resulting field then uses less space in the report. The initial default setting is "Yes."

Options for List Report Layouts

Display Options:	
Include Description Field:	No
Include Remarks:	No

- **Include Description Fields** (Only applies to Information Records; initial default: "No")

If an Information Record has an entry in the description field, it can be appended to the row for that record as shown below:

Clooz ID	Alternate ID	Year	Record Type	Location	User Rating	Source
19		1950	Census (US)	Hazleton, Hazel, Luzerne County, Pennsylvania, US		US, 1950 Federal Census (Ancestry)
21		1956	Passenger List			PA, Passenger Lists of Vessels Arriving at Philadelphia, Pennsylvania
22		1881	Census (UK)	Llangatsook, Breconshire, Wales		UK, 1881 England, Wales & Scotland Census
23		1884	Letter [Correspondence]		★★★★★	John Davis cable/letter to Children, 1884
Description: The letter includes the birth dates of all of their children.						
24			Marriage Record (Civil)	Pottsville, Schuylkill County, Pennsylvania, U.S.		Certificate of Marriage
25		2009	Marriage Record (Civil)	Criclowell, Breconshire, Wales		
Description: Certified copy of an entry of marriage.						
26		1940	Census (US)	Fleming, Coal Township, Northumberland County, Pennsylvania, US		US, 1940 Federal Census (Ancestry)
27		1993	Mining Accident (News Article)	Sherandoah, Schuylkill County, Pennsylvania, USA		PA, Sherandoah, Evening Herald

- **Include Remarks** (Only applies to Information Records; initial default: "No")

If an Information Record has an entry in the remarks field, it can be appended to the row for that record (similar to how the description field appears in the above example).

Sorting Lists in the Report Viewer

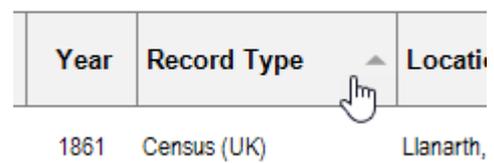
The Report Viewer provides an interactive sorting capability for list-style reports.

To reorder the records in a list, click on header for that column. Multi-column sorting can also be done by holding down the Shift key while clicking a 2nd or 3rd column.

Columns being sorted will show an up or down arrow on the right side of the header area indicating ascending or descending sorting. Additional clicks of the same column will toggle between the sort orders.

Informa

Year	Record Type	Location
1861	Census (UK)	Llanarth,



When you export the report to another file type, the sort order in effect at the time will be used for the export.

Exporting Directly to Excel

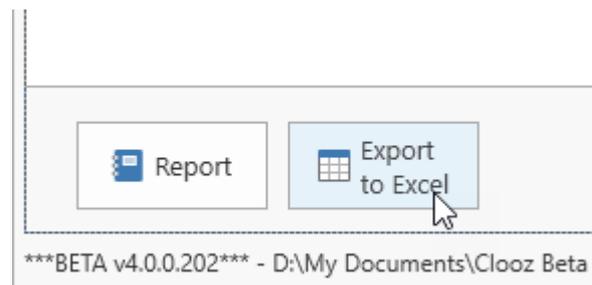
Reports in Clooz can be exported to Excel (as well as a few other formats) from the Report Viewer window. However, Clooz can also directly output data to a Microsoft Excel file without going through the report generation process. All of these methods will produce slightly different results in the Excel file, giving you flexibility in using the method that best meets your intentions.

There are several places where you can directly output data to an Excel file, which then is displayed in the Excel program:

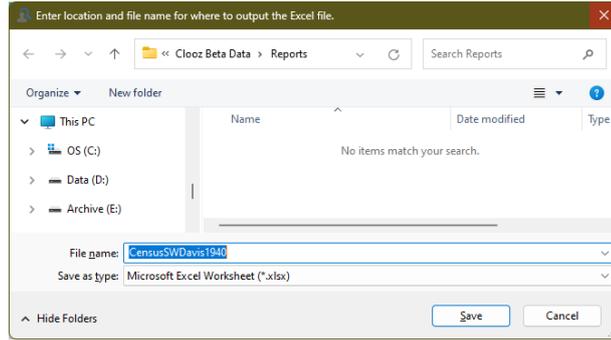
- From any of the data editors, where an entire record and all related content can be included, and
- From any of the main screen lists, which includes only the fields currently displayed in the list.

Exporting to Excel from Data Editors

Clicking the Export to Excel button in any of the data editors will have Clooz produce an Excel worksheet file (with multiple worksheet pages for most data types) that is a content dump of the data associated with the data record currently being edited.



The first step to occur is selecting the filename and location for the new worksheet file.

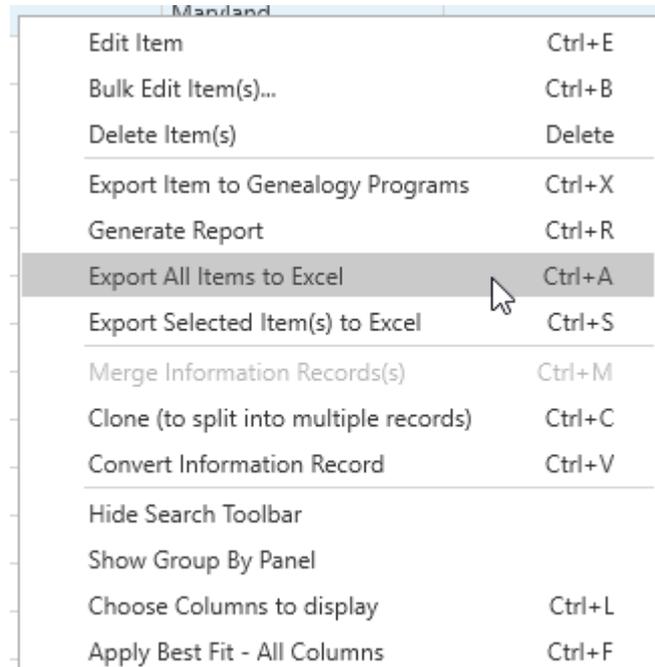


The worksheet file will then be created at that location and opened in Excel (or whatever program your computer has set as the default program for the .xlsx file type). Tabs (worksheets) are setup in Excel to contain all the information in various types of records associated with the record originally opened in the editor. This Excel file is then a complete dump of all the information from that individual data record.

Date Census Taken (enumeration date)	Sheet	Line	Location		Household Data				Surname	Given Name	Relationship	Personal Description				Education		Place of Birth	Citizenship
			Street	House Number	Family No.	Owned or Rented	Value of Home	Farm?				Sex	Race	Age	Marital Status	Attended School	Highest Grade		
19 APR 1940	17B	74	Fern	1133	293	O		1400	Davis	Samuel	Head	M	W	37	M		H-4	Pennsylvania	
19 APR 1940	17B	74	Fern	1133	293	O		1400	Davis	Samuel	Head	M	W	37	M		H-4	Pennsylvania	
19 APR 1940	17B	75	Fern	1133	293				Davis	Stella	Wife	F	W	36	M		6	Poland	Na
19 APR 1940	17B	76	Fern	1133	293				Davis	Elizabeth	Daughter	F	W	13	S	X	7	Pennsylvania	
19 APR 1940	17B	77	Fern	1133	293				Davis	Dolores	Daughter	F	W	8	S	X	2	Pennsylvania	
19 APR 1940	17B	78	Fern	1133	293				Davis	Samuel Jr	Son	M	W	6	S	X	0	Pennsylvania	
19 APR 1940	17B	79	Fern	1133	293				Latovich	Frances	Mother in Law	F	W	58	Wd		2	Poland	AI
19 APR 1940	17B	80	Fern	1133	293				Latovich	Charles	Brother in Law	M	W	20	S		H-1	Pennsylvania	

Exporting to Excel from Main Screen Lists

The context menus (right click) for each of the lists of data in the various tabs on the main screen of Clooz offers several functions to output the information contained in the list directly to an Excel file. This is available whether the list is in grid form or Composite View. Two options are provided, either to export all the records in the entire list or those records currently selected. Only the data for the columns shown in the list are exported.



The Excel file created as a result of this operation will be setup to reflect any column selection, data groupings, filters, and sorting you have in place on the Clooz list being exported.

When the *Export All Items to Excel* menu item is selected, you first select the Excel (.xlsx) file to output the data to, and then the new file will be opened in Excel. All of the records currently appearing in the list will be output to this file.

1	To Record	Personal File	Document Type	Event Type	Year	Country	State/Province	County	Parish/Township	City	User Ratio	Description	Date Updated
2			Photograph								0		3 Jul 2022
3			Census (US)	Census	1900	US	Pennsylvania	Schuylkill County		Shenandoah	0		16 Jul 2022
4			Census (US)	Census	1920	US	Pennsylvania	Northumberland Cour		Shamokin	0		27 Sep 2022
5			Census (US)	Census	1910	US	Pennsylvania	Northumberland Cour		Shamokin	0		16 Jul 2022
6			Census (US)	Census	1940	US	Pennsylvania	Northumberland Cour	Coal Township	Ferndale	0		16 Jul 2022
7			Census (US)	Census	1930	US	Pennsylvania	Northumberland Cour	Coal Township	Ferndale	0		16 Jul 2022
8			Census (US)	Census	1950	US	Maryland			Baltimore	0		27 Jul 2022
9			Census (US)	Census	1920	US	Pennsylvania	Northumberland Cour	Coal Township		0		16 Jul 2022
10			Census (US)	Census	1930	US	Pennsylvania	Northumberland Cour		Shamokin	0		16 Jul 2022
11			Census (US)	Census	1940	US	Pennsylvania	Adams County		Littlestown	0		16 Jul 2022
12			Census (US)	Census	1950	US	Pennsylvania	Delaware County		Collingdale	0		16 Jul 2022
13			Military Entry Record	Military Service	1917	US	Pennsylvania	Northumberland Cour			0		17 Jul 2022
14			Directory [Population]	Residence	1890	U.S.	Pennsylvania	Schuylkill County		Shenandoah	1		27 Jul 2022
15			Death Record	Death	1923	U.S.	Pennsylvania	Northumberland Cour		Shamokin	1		15 Apr 2023
16			Census (UK)	Census	1861	Wales	Cardiganshire		Llanarth		-2	Not the family sought.	24 Apr 2022
17			Census (US)	Census	1880	US	Pennsylvania	Northumberland Cour		Shamokin	0		27 Jul 2022
18			Census (US)	Census	1870	US	Pennsylvania	Schuylkill County		Shenandoah Cit	0		27 Jul 2022
19			Census (US)	Census	1860	US	Pennsylvania	Luzerne County	Hazel	Hazeltton	0		27 Jul 2022
20			Passenger List	Travel	1856						0		28 Jul 2022
21			Census (UK)	Census	1851	Wales	Breconshire		Llangatock		0		29 Jul 2022
22			Letter [Correspondence]	Correspondence	1884						4	The letter includes the birth date	27 Sep 2022
23			Marriage Record (Civil)	Marriage		U.S.	Pennsylvania	Schuylkill County		Pottsville	0		29 Jul 2022

 Setup the list on the main screen before exporting to Excel. This includes setting or clearing any desired filters you have applied in the toolbar, and turn on display of the columns you want to see in the Excel file. If you have a filter applied to only show some of the records from the database, only those filtered records will be exported. Likewise, only data from the columns appearing in the list will be exported.

 When exporting to Excel from the Composite View, only those records showing will be exported. If you want the information from subordinate or child records (those you see in the Composite View after you expand a record) you need to expand those records prior to performing the export. Hidden records will not be exported.

Here is an example of the other export option, *Export Selected Item(s) to Excel* as performed from the Composite View. As mentioned above, records need to be expanded for the underlying records to be exported. Likewise, all of the records you want to export must be selected, regardless of the hierarchical level.

The screenshot shows a web application interface with a table of records. A context menu is open over record 41, showing options such as 'Export Selected Item(s) to Excel' (Ctrl+S), 'Merge Information Records(s)' (Ctrl+M), and 'Export All Items to Excel' (Ctrl+A). The table columns are: Information Record ID, Personal File # (Names), Year & Event/Record Type (Name Appearing, Role/Relation Age), Location (Vital Dates), and User Rating.

Information Record ID	Personal File # (Names)	Year & Event/Record Type (Name Appearing, Role/Relation Age)	Location (Vital Dates)	User Rating
2		Photograph: Ruth (rt), age 23		
3		1900 Census (US)	Shenandoah, Schuylkill County, Pennsylvania, US	
4		1920 Census (US)	Shamokin, Northumberland County, Pennsylvania, US	
5		1910 Census (US)	Shamokin, Northumberland County, Pennsylvania, US	
6		1940 Census (US)	Ferndale, Coal Township, Northumberland County, Pe...	
6	Davis, Samuel W Jr.	Davis, Samuel , Head (Age: 37)	b: Abt from 1902 to 1903; m: Abt 1924; d: Abt from 1...	
29	Lotovich, Stella	Davis, Stella , Wife (Age: 36)	b: Abt 1904; m: Abt 1924;	
37	Davis, Elizabeth	Davis, Elizabeth , Daughter (Age: 13)	b: Bet Apr 1926 and Apr 1927;	
38	Davis, Dolores	Davis, Dolores , Daughter (Age: 8)	b: Bet Apr 1931 and Apr 1932;	
39	Davis, Samuel C.	Davis, Samuel Jr , Son (Age: 6)		
40	Lotovich, Frances	Latovich, Frances , Mother in Law (Age: 58)		
41	Lotovich, Charles	Latovich, Charles , Brother in Law (Age: 20)		
7		1930 Census (US)		
42	Lotovich, Charles	Lotovich, Charles , Head (Age: 53)		
40	Lotovich, Frances	Lotovich, Frances , Wife (Age: 48)		
43	Lotovich, Julia	Lotovich, Julia , Daughter (Age: 13)		
41	Lotovich, Charles	Lotovich, Charles , Son (Age: 10)		
29	Lotovich, Stella	Davis, Stella , Daughter (Age: 25)		
6	Davis, Samuel W Jr.	Davis, Samuel , Son in Law (Age: 27)		
37	Davis, Elizabeth	Davis, Betty , Grd Daughter (Age: 4)		
8		1950 Census (US)		
9		1920 Census (US)		
10		1930 Census (US)		
11		1940 Census (US)	Littlestown, Adams County, Pennsylvania, US	

The resulting Excel file from the above export operation appears as follows.

The screenshot shows an Excel spreadsheet with the following data:

Information Record ID	Personal File # (Names)	Year & Event/Record Type (Name Appearing, Role/Relation Age)	Location (Vital Dates)	User Rating
6		1940 Census (US)	Ferndale, Coal Township, Northumberland Cour	0
6	Davis, Samuel W Jr.	Davis, Samuel , Head (Age: 37)	b: Abt from 1902 to 1903; m: Abt 1924; d: Abt from 1954 to 1960	
29	Lotovich, Stella	Davis, Stella , Wife (Age: 36)	b: Abt 1904; m: Abt 1924;	
37	Davis, Elizabeth	Davis, Elizabeth , Daughter (Age: 13)	b: Bet Apr 1926 and Apr 1927;	
38	Davis, Dolores	Davis, Dolores , Daughter (Age: 8)	b: Bet Apr 1931 and Apr 1932;	
39	Davis, Samuel C.	Davis, Samuel Jr , Son (Age: 6)	b: Bet Apr 1933 and Apr 1934;	
40	Lotovich, Frances	Latovich, Frances , Mother in Law (Age: 58)	b: Bet Apr 1881 and Apr 1882;	
41	Lotovich, Charles	Latovich, Charles , Brother in Law (Age: 20)	b: Bet Apr 1919 and Apr 1920;	
7		1930 Census (US)	Ferndale, Coal Township, Northumberland Cour	0
42	Lotovich, Charles	Lotovich, Charles , Head (Age: 53)	b: Bet Apr 1876 and Apr 1877;	
40	Lotovich, Frances	Lotovich, Frances , Wife (Age: 48)	b: Bet Apr 1881 and Apr 1882;	
43	Lotovich, Julia	Lotovich, Julia , Daughter (Age: 13)	b: Bet Apr 1916 and Apr 1917;	
41	Lotovich, Charles	Lotovich, Charles , Son (Age: 10)	b: Bet Apr 1919 and Apr 1920;	
29	Lotovich, Stella	Davis, Stella , Daughter (Age: 25)	b: Abt 1904; m: Abt 1924;	
6	Davis, Samuel W Jr.	Davis, Samuel , Son in Law (Age: 27)	b: Abt from 1902 to 1903; m: Abt 1924; d: Abt from 1954 to 1960	
37	Davis, Elizabeth	Davis, Betty , Grd Daughter (Age: 4)	b: Bet Apr 1926 and Apr 1927;	

Notice that the Excel file maintains a hierarchical structure (shown by the plus/minus buttons).

Chapter 13

If you were to export records from a Composite View that were not expanded at the time of the export, Excel will still show a plus button. However, if you click it, the row displayed will be blank. This is illustrated below in row 7 of the spreadsheet.

	A	B	C	
	Information Record ID	Personal File # (Names)	Year & Event/Record Type (Name Appearing, Role/Relation Age)	
1				
2	2		Photograph: Ruth (rt), age 23	
3	3		1900 Census (US)	Shenandoah, Sch
4	4		1920 Census (US)	Shamokin, Northu
5	2	Davies, Samuel Winfield	Davis, Samuel W , Head (Age: 58)	b: 22 Sep 1861; m:
6	3	1900 Census (US)	Davies, Samuel W , Head (Age: 38)	Shenandoah, Sch
7				
8	4	1920 Census (US)	Davis, Samuel W , Head (Age: 58)	Shamokin, Northu
10	5	1910 Census (US)	Davis, Samuel , Head (Age: 48)	Shamokin, Northu
12	14	1890 Directory [Population]	Davis, Samuel W . , Head	5th Ward, Shenan
14	15	1923 Death Record	Davis, Samuel Winfield , Decedent (Age: 61yr 5m)	Shamokin, Northu
16	17	1880 Census (US)	Davis, Samuel W , Son (Age: 19)	Shamokin, Northu
18	18	1870 Census (US)	Davis, Samuel , (Age: 8)	Shenandoah City,
20	23	1884 Letter [Correspondence]	Davies, Samuel	
22	3	Shoppbell, Clara Gussie	Davis, Clara , Wife (Age: 53)	b: 17 Feb 1865; m:
23	3	1900 Census (US)	Davies, Clara G , Wife (Age: 35)	Shenandoah, Sch
25	4	1920 Census (US)	Davis, Clara , Wife (Age: 53)	Shamokin, Northu
27	5	1910 Census (US)	Davis, Clara , Wife (Age: 44)	Shamokin, Northu

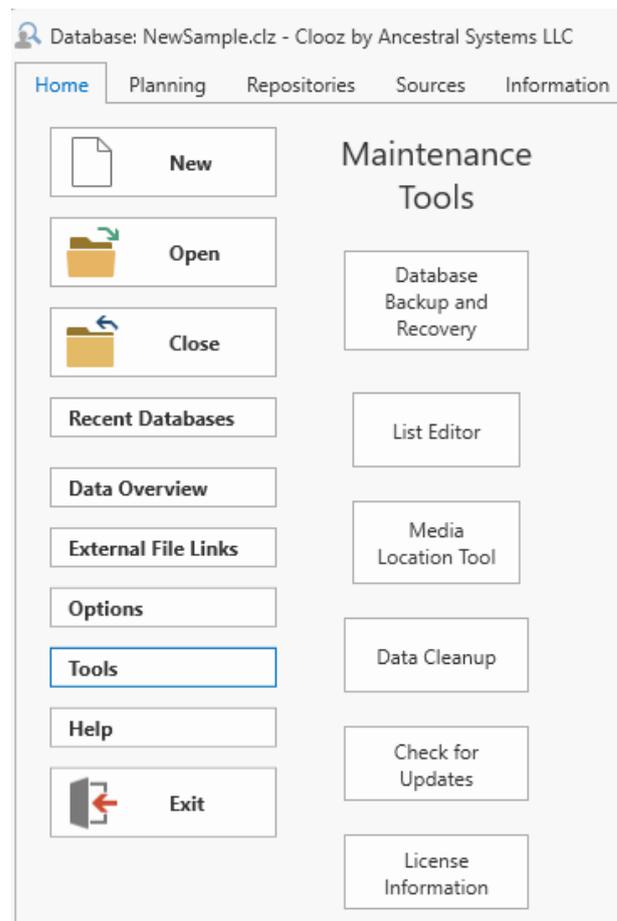
Chapter 14

Tools and Options

There is a collection of utilities under the Home tab to help you maintain your Clooz database.

These include a set of customization options, as well as the following maintenance tools:

- Database Backup and Recovery - Archive your data in case you need to restore it in the future.
- List Editor - Edit any of the text used to generate the automatic completion suggestions list which appears for some text fields.
- Media Location Tool - Identify and/or fix broken file links to attached media files, which happens when you copy data to a new computer system.
- Data Cleanup - Reapply date field formatting and other surname tracking.
- Check for Updates - Find out if an updated version of Clooz is available, with option to install it.
- License Information - Obtain information about your Clooz user license.



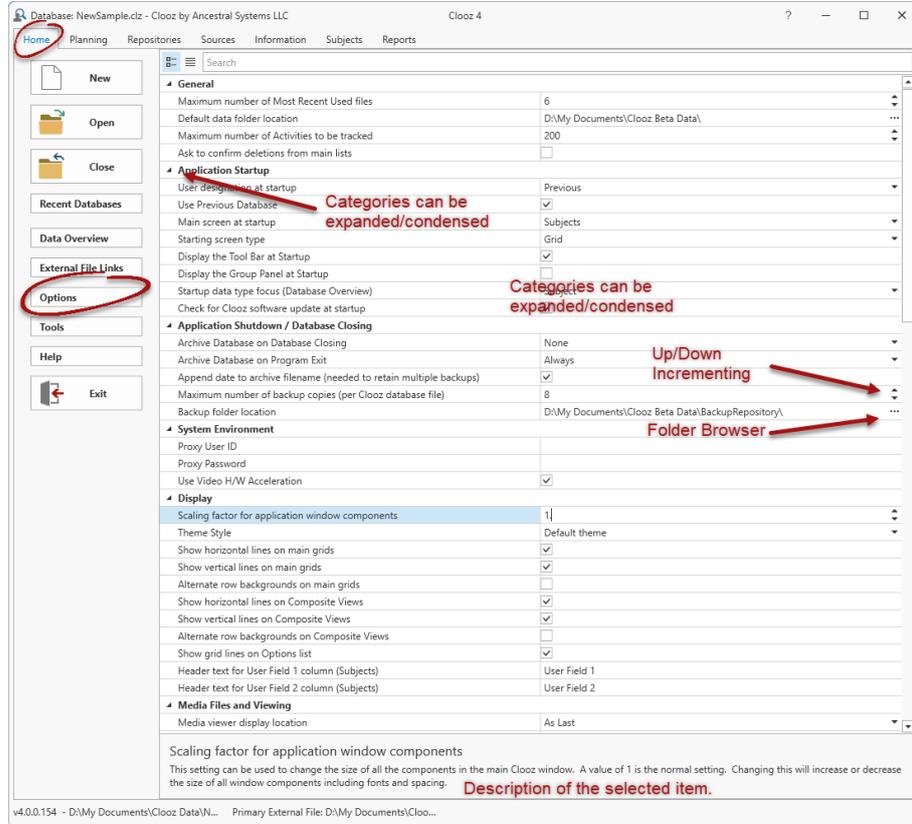
For links to the Clooz Help and Support Resources, click the Help button.

Program Options

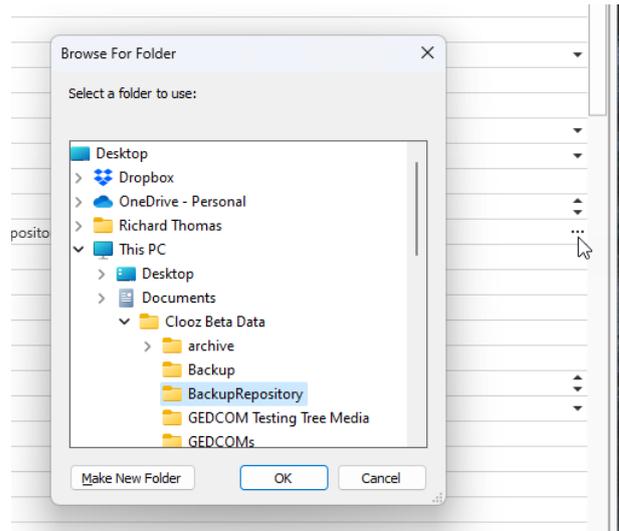
You can customize the behavior and appearance of many features in Clooz using the option settings. To get to the Options screen, click on the Home tab at the top, and then click on the Options button.

The Options settings use a variety of controls depending on the type of selection being made:

- Text fields
- Folder Selections
- Check boxes
- Drop down list selections
- Incrementing (click the Up or Down arrow to increment the value)



For items where a folder selection needs to be made, either type in the folder path or use the browse button to display a folder browser where you can select (or add) the folder to be used.



Items with a down arrow on the extreme right have drop down lists to choose from.



General Options

Maximum number of Most Recent Used files

Maximum number of files to be held in the Most Recently Used files list. (Default: 6)

Default data folder location

Starting folder initially display when selecting a Clooz database to open or location to create a new one.

(Default: [My Documents]\Clooz Data)

Maximum number of Activities to be tracked

The database overview feature on the Home tab page displays an Activity History list of records you have created, edited, deleted. This value sets the maximum

number of items saved for that list. (Default: 200)

Ask to confirm deletions from main lists

Always ask to confirm a deletion from the main lists (Subject, Information Records, Sources, Repositories, Research). (Default: unchecked)

Application Startup Options

User designation at startup

Determines the method used to designate the Clooz user's identity. (Default: Previous)

Use Previous Database

Always open the last used database when starting Clooz. (Default: checked)

Main screen at startup

Choose which of the main screens will be displayed at startup (Default: Subjects)

Show Help at startup after updates.

When selected, the Help screen (which includes news about the latest updates and other important announcements) will override the normal startup screen selection following software updates. The regular startup screen will resume on subsequent starts of Clooz. (Default: Checked)

Starting screen type

Designates whether the grid-type display or composite view will be first displayed. (Default: Grid)

Display the Tool Bar at Startup

The Tool Bar will be displayed on the main tabs when Clooz is started if this option is chosen. Otherwise, click the Show Toolbar in the grid context menu (right click) to display it. (Default: checked)

Display the Group Panel at Startup

The Group Panel will be displayed for the grids shown on the main tabs when Clooz is started if this option is chosen. Otherwise, click the Group Panel button or select Show Group Panel in the grid's context menu (right click) to display the panel when needed. (Default: unchecked)

Startup data type focus (Database Overview)

Designates which type of data will be the focus in the Database Overview panel (Home tab) when first displayed. (Default: Subject)

Check for Clooz software update at startup

Select this option to have Clooz check whether a new version is available. (Downloads and prompts for installation).(Default: checked)

Application Shutdown / Database Closing Options

Archive Database on Database Closing

Choose how backups are handled when a database is closed. Either skip backups all the time, ask each time if backup should be done, or always backup the database (if changes were made). (Default: None)

Archive Database on Program Exit

Choose how backups are handled when the program is closed. Either skip backups all the time, ask each time if backup should be done, or always backup the database (if changes were made). (Default: Always)

Append date to archive filename (needed to retain multiple backups)

Adds the current date and time to the filename of backup copy. This is required if multiple backup copies are to be retained, otherwise only the latest backup is retained.(Default: checked)

Maximum number of backup copies (per Clooz database file)

Automatic backups on exit will start overwriting the oldest backup after this number of backup copies exist. Set to 0 for retention of unlimited backups if date tagging is turned on. This limit is only applied when automatic backups are generated.

(Default: 8)

Backup folder location

Folder to be used for automatic backups; Serves as default location for manual archiving.

(Default: [Clooz Data Folder]\BackupRepository)

System Environment Options

Proxy User ID

If a proxy server is used (uncommon), provide User ID. (Default: blank)

Proxy Password

If a proxy server is used (uncommon), provide the user's Password. (Default: blank)

Use Video H/W Acceleration

Recommended to use video hardware acceleration unless internal media view is producing errors.(Default: checked)

Display Options

Scaling factor for application window components

This setting can be used to change the size of all the components in the main Clooz window. A value of 1 is the normal setting. Changing this will increase or decrease the size of all window components including fonts and spacing. (Default: 1)

Theme Style

This setting can be used to set the theme style Clooz should use when displaying all of the program's windows.

(Default: Default theme)

Show horizontal lines on main grids

Controls whether the horizontal lines will appear on the main grids. (Default: checked)

Show vertical lines on main grids

Controls whether the vertical lines will appear on the main grids. (Default: checked)

Alternate row backgrounds on main grids

If set true, the background colors of rows in the main grids will alternate. (Default: unchecked)

Show horizontal lines on Composite Views

Controls whether the horizontal lines will appear on the Composite Views. (Default: checked)

Show vertical lines on Composite Views

Controls whether the vertical lines will appear on the Options list. (Default: checked)

Alternate row backgrounds on Composite Views

If set true, the background colors of rows in the list will alternate. (Default: unchecked)

Show grid lines on Options list

Controls whether the lines will appear on the Options list. (Default: checked)

Header text for User Field 1 column (Subjects)

There are two additional user-definable fields for Subjects (UserField1 and UserField2). This is the text to appear in the column header for UserField1. (Default: User Field 1)

Header text for User Field 2 column (Subjects)

There are two additional user-definable fields for Subjects (UserField1 and UserField2). This is the text to appear in the column header for UserField2. (Default: User Field 2)

Media Files and Viewing Options

Media viewer display location

When opening media items with Clooz's viewer the first time in a Clooz work session, display the viewer either internally (within Clooz Window), externally (separate Window), or however the viewer was last used (in previous session of Clooz). If the location is changed by the user during a work session, the new location is maintained. Items displayed using the default Windows Viewer are always in a separate Window. (Default: As Last)

Use Clooz image viewer

Use Clooz media viewer for image files (otherwise the Windows system default application is used). Each media file can be individually set to use the Windows system default viewer, overriding this general setting. (Default: checked)

Use Clooz pdf viewer

Use Clooz media viewer for pdf files (otherwise the Windows system default application is used). Each media file can be individually set to use the Windows system default viewer, overriding this general setting. (Default: checked)

Use Clooz spreadsheet viewer

Use Clooz media viewer for spreadsheet files (otherwise the Windows system default application is used). Each media file can be individually set to use the Windows system default viewer, overriding this general setting. (Default: checked)

Use Clooz text viewer

Use Clooz media viewer for text files (otherwise the Windows system default application is used). Each media file can be individually set to use the Windows system default viewer, overriding this general setting. (Default: checked)

Default root media folder

This directory location represents your preferred root directory for where media items will be stored. It can be overridden when saving media files. (Default: [Clooz Data Folder]\Media)

Date Processing Options

Treat ambiguous dates as U.S. order (mm/dd/yyyy)

Determines whether ambiguous dates (e.g., 5/10/1900) are treated as mm/dd or dd/mm. (Default: checked)

Show month in all CAPS

Month names (or abbreviations) are displayed in all upper case letters. (Default: unchecked)

Month name format

Are months to be displayed with full or abbreviated names? (Default: abbreviated)

Date modifier format

Are date modifiers to be displayed with full or abbreviated names (e.g., About or Abt)? (Default: abbreviated)

Date modifier case useage

Are date modifiers to be displayed in all lower case (abt), mixed case (Abt), or upper case (ABT)? (Default: mixed)

Personal File Identifier Options

Show duplicated Personal File ID warning

Popup a warning if a Personal File ID is duplicated. (Default: unchecked)

Show missing Personal File ID warning

Popup a warning if a Personal File ID is left blank. (Default: unchecked)

Subject Data Updating Options

Auto-fill Vital events if blank

When an information record suggests a vital event (birth, death, marriage), apply it to the Subject if the subject does not already have data for that event. (Default: checked)

Ask to overwrite Birth event data

When an information record suggests a birth event and the Subject already has data for that event, ask if it should be overwritten. (Default: checked)

Ask to overwrite Marriage event data

When an information record suggests a marriage event and the Subject already has data for that event, ask if it should be overwritten. (Default: checked)

Ask to overwrite Death event data

When an information record suggests a death event and the Subject already has data for that event, ask if it should be overwritten. (Default: checked)

Information Record Options

Default setting for copying details

Determines whether an Information Editor will be set when opened to pre-fill details when adding a subject based on selected subject. (Default: checked)

Source Options

Source list naming

Clooz will use the selected Source field (Actual title or User assigned label) in dropdown and certain other lists for Source selection. For each source in the list, if the chosen field (title or label) is blank, the other field is displayed when available. (Default: Label)

Automatically use Quick Capture URL as Publisher URL

Clooz will copy the URL entered into the Quick Capture area as the URL of the Publisher (Default: Yes). Otherwise, the URL fields remain totally independent.

Editor Options

Autocomplete is case sensitive

This option controls whether the auto-complete function in many edit fields uses case sensitivity (upper and lower case) when matching the entered text with suggested list items. When the box is checked, matches must exactly match the case of the characters in the drop down list. Check the box if you want the ability to have both upper and lower case versions of the same text in the list to choose from, but you'll need to enter the correct case to match an item. Uncheck the box if you want to be able to get the list item regardless of the case of characters you typed. This feature does not apply to fields in templates where the first character is forced to be upper case per the template specification (certain fields such as sex and race). (default: unchecked)

Toolbar Options

Type of operation (search or filter) performed when Enter key is pressed

This selection determines whether a Search or Filter operation is performed with the existing criteria when the Enter key is pressed within the Search/Filter text field.

(Default: Search)

Import / Export Options

Cite the source for Each Census Person's Name (Export)

When exporting a Census Record, cite the information record's source for each person's name (even if it differs from the actual name appearing in the Census). Otherwise, Clooz only cites the name if it exactly matches that in the Census record.

(Default: unchecked)

Save archive (backup) of database prior to imports

Default setting for the checkbox in the Data Transfer Manager controlling whether or not to make an archive backup of the Clooz database currently open prior to importing data into Clooz from external sources. Can be changed in the Data Transfer Manager prior to importing. (Default: checked)

Default setting: Include events and families for Subjects in Information Records.

When importing data from another Clooz file, if the import contains Information Records and Subjects, include events and families. This is the default setting. Can be overridden when performing imports. (Default: checked)

Default setting: Import cited sources when importing Information Records

When importing data from another Clooz file, if the import contains Information Records, include the cited source. This is the default setting and can be overridden when performing imports. (Default: checked)

Default setting: Include repository for any sources being imported.

When importing sources from an external file, include the repository. This is the default setting and can be overridden when performing imports. (Default: checked)

Default setting: Include digital files linked to imported records.

When information records, sources, or repositories are being imported from external files, include existing links to any digital files. This is the default setting and can be overridden when performing imports. (Default: checked)

Perform auto-linking of subjects when loading Data Transfer Manager.

When loading data from an external file in the Data Transfer Manager, automatically link external people with Clooz people when matching Universal Identification values are found. (Default: unchecked)

Media handling when exported

When exports to external programs include media files, they can be copied to a user determined location, or left in the original location with a reference back to them passed to the external program. If to be copied, the folder specified as the default for media export will be used (or requested each time if left blank). (Default: By Reference)

Default folder for exported media

Only applies when handling option for exported media is set to CopyFile. Enter the path to the directory where Clooz should copy media files when exporting. Leave this field blank if you want Clooz to request identification of the folder each time an export is run. For Legacy Family Tree, RootsMagic and Family Historian a partial path (not specifying a disk drive) will be used as relative paths from the external project folder. (Default: blank)

Default target for creating new GEDCOMs (for export)

The target external program can be specified so any special data formatting or rules are applied when creating a new GEDCOM file for export (Generic or Family Tree Maker). This setting serves as the default choice which can be then overridden. (Default: Generic)

Include Unique ID with Exported Persons

Some genealogy programs are setup to support unique identifiers for each person (UID records in GEDCOM files). These permit matching of people previously exported to those in the database if later imported back in. Clooz always exports these for programs known to be setup to handle them (Legacy Family Tree, RootsMagic, Ancestral Quest). It is optional for other exports.

(Defaults: Family Historian, FamilyTreeMaker, GEDCOM file (no specific target program) all unchecked)

Allow Advanced Import/Export Options to continue with a different external file.

There are several Advanced Options available when importing and exporting data (relating to handling of the Alternate ID for records in Clooz). In the situation where Advanced Options were selected for a particular external file, when this box is checked, the Advanced Options dialog window will appear if a different external file is selected (allowing settings to continue or be cleared). If you do not check this box (default), the options will be reset every time you change to a different external file (dialog window will not appear). (Default: unchecked)

Default setting: Create Research Planning items.

During the transfer, Clooz will setup a project with objectives and search tasks related to the people and sources being imported. This will assist you in later extracting Information Records from these sources. It is the default setting and can be overridden when performing imports. (Default: checked)

Default template for titles of new research project.

When importing records, new research projects can be established. Enter the default template for new research project titles (Can be overridden at time of import.

Placeholder fields (actual content replaced when executing) available here:

{ExternalFileType} {ExternalFileName}.

(Default: {ExternalFileName} Imports)

Default template for purpose field in new research projects.

When importing records, new research projects can be established. Enter the default template for new research project purpose fields (Can be overridden at time

of import. Placeholder fields (actual content replaced when executing) available here: {ExternalFileType} {ExternalFileName}.

(Default: Information analysis related to imports from {ExternalFileType} file:

{ExternalFileName}.)

Default template for description field in new research projects.

When importing records, new research projects can be established. Enter the default template for new research project descriptions (Can be overridden at time of

import. Placeholder fields (actual content replaced when executing) available here:

{ExternalFileType} {ExternalFileName}. (Default: blank)

Default template for comment field in new research projects.

When importing records, new research projects can be established. Enter the

default template for new research project comments (Can be overridden at time of

import. Placeholder fields (actual content replaced when executing) available here:

{ExternalFileType} {ExternalFileName}.

(Default: Auto-generated during import from {ExternalFileType} file:

{ExternalFileName}.)

Default template for titles of new research objective.

When importing records, new research objectives can be established. Enter the default template for new research objective titles (Can be overridden at time of import. Placeholder fields (actual content replaced when executing) available here: {ExternalFileType} {ExternalFileName} {SourceName}).

(Default: {SourceName} Review)

Default template for objective statements in new research objectives.

When importing records, new research objectives can be established. Enter the default template for new research objective statements (Can be overridden at time of import. Placeholder fields (actual content replaced when executing) available here: {ExternalFileType} {ExternalFileName} {SourceName}).

(Default: Extract information from {SourceName} related to targeted subjects.)

Default template for comment fields in new research objectives.

When importing records, new research objectives can be established. Enter the default template for new research objective comments (Can be overridden at time of import. Placeholder fields (actual content replaced when executing) available here: {ExternalFileType} {ExternalFileName} {SourceName}).

(Default: Auto-generated during import from {ExternalFileType} file: {ExternalFileName}.)

Default template for titles of new research tasks.

When importing records, new research tasks can be established. Enter the default template for new research task titles (Can be overridden at time of import. Placeholder fields (actual content replaced when executing) available here: {ExternalFileType} {ExternalFileName} {SourceName}).

(Default: {SourceName} Search.)

Default template for description field in new research tasks.

When importing records, new research tasks can be established. Enter the default template for new research task descriptions (Can be overridden at time of import.

Placeholder fields (actual content replaced when executing) available here:

{ExternalFileType} {ExternalFileName} {SubjectName} {SourceName}.

(Default: Search and extract information imported from {ExternalFileType} file:

{ExternalFileName}.)

Default template for comment field in new research tasks.

When importing records, new research tasks can be established. Enter the default template for new research task comments (Can be overridden at time of import.

Placeholder fields (actual content replaced when executing) available here:

{ExternalFileType} {ExternalFileName} {SubjectName} {SourceName}.

(Default: Auto-generated during import from {ExternalFileType} file:

{ExternalFileName}.)

Default setting: Do not create objectives if source use is already documented.

When importing records, new research objectives and tasks can be established related to a given source. When this box is checked, objectives will not be created

when the source and all subjects associated with it have already been linked to

Clooz information records. If you desire to recheck your previous research, leave

this box unchecked and new research objectives will be created. This setting can be

overridden at the time of import. (Default: True)

Default setting: Use existing research objectives associated with source.

When importing records, new research objectives and tasks can be established

related to a given source. When this box is checked, Clooz attempts to avoid

possible duplication of research objectives. If you are using a research project

already in use and there are research objectives associated with the source being

imported, any additional subjects will be added to the existing list of research targets

instead of creating a new objective. Leave the box unchecked if you want new objectives to be created in this import action separate from any previous research planning items. (Default: True)

Starting folder location for GEDCOM exports.

Folder initially displayed when selecting a location to save a new GEDCOM export. (Default: Clooz Data folder)

Optional Template Groups

Country Censuses

For each of the countries listed, the selects control whether that country's censuses should be shown in the list of Information Record types. Changes made here will appear the next time Clooz is started. (Default: All checked)

Default Country Names

Fields are provided to customize the preferred name to be used for various countries.

Country	Default Name
Australia	Australia
Canada	Canada
Denmark	Denmark
France	France
Germany	Germany
Ireland	Ireland
Norway	Norway
United Kingdom	UK
United States	USA

Database Backup and Recovery

The longer you use Clooz (or any of the programs supporting your family history research), the more valuable your work will become. Clooz has built-in functions to create backup copies of its database files and recover a database from backup copies for use again in Clooz. Creation of the backup copy is initiated by any of the following methods or events:

- A Clooz database file is closed (if set in program options),
- Clooz program is exited (if set in program options),
- Before a data import in the Data Transfer Manager (if check box on Data Transfer Manager is set to perform archive), or
- Manually using the Database Backup and Recovery tool on the Home tab page.

When Clooz performs a backup action, the file is compressed (zipped) to save disk space, and placed in the folder you have designated in the program Options. The only exception is with manual backup and recover, where a different folder location can be specified (see Manual Backup). The number of backup copies maintained (where oldest are replaced by most recent copies) and whether the file copies are tagged with the date in the filename are options you can set in the program options.



When you installed Clooz, the default location for storing archived copies of your database is the BackupRepository folder within your Clooz Data folder. This is not necessarily the best place for saving backup copies. Backup copies are best kept on a different physical disk, preferably on a different computer, and ideally in a different physical location all together (such as in the Cloud). You may already have a computer system-wide backup service that handles all of this. Just make sure the backup location you specify in Clooz is included in the locations backed up by that service. Otherwise, you might have a subscription to services such as Dropbox. If so, placing the backup folder location within the local area on your computer replicated by Dropbox in the cloud would provide a safe arrangement.



Clooz does not backup any of the digital media files you might have attached to your records in Clooz. Be sure your general backup plan for your computer system includes those as well as all the other files you've generated or collected as part of your family history research.

Database Backup Options

The program Options screen (Home tab page) includes a number of backup-related options in the Application Shutdown/Database Closing category.

CHECK FOR CLOOZ SOFTWARE UPDATES AT STARTUP	
Application Shutdown / Database Closing	
Archive Database on Database Closing	None
Archive Database on Program Exit	Always
Append date to archive filename (needed to retain multiple backups)	<input checked="" type="checkbox"/>
Maximum number of backup copies (per Clooz database file)	8
Backup folder location	C:\My Documents\Clooz Data\BackupRepository\
System Environment	

You can have the database backup run automatically every time you close the database (to open a different one) and/or every time you exit Clooz. In both of those cases, you can set the automatic backup to None (no backup run), Ask (a prompt will be shown for you to choose), or Always (backup run every time).

Manual Database Backup

The screenshot shows a software interface for performing a manual database backup. On the left, there is a sidebar titled "Maintenance Tools" with a button labeled "Database Backup and Recovery". The main area is titled "Database Backup" and contains the following text: "This function creates a backup (or archive) copy of the selected database file in the designated archive folder." Below this text are two input fields. The first is labeled "Database file to be archived:" and contains the text "C:\My Documents\Clooz Data\Sample.clz". The second is labeled "Folder where archived copy will be placed:" and contains the text "C:\My Documents\Clooz Data\BackupRepository\". At the bottom of the main area are two buttons: "Perform Backup" and "Perform Backup and Compaction".

T

o make a backup copy of your database, go to the Home tab page, Tools screen, and click the Database Backup and Recovery button and follow these steps:

1. Select the database file to be archived. (Click the browser button at the right end of the edit box to select the file using a File selection dialog.)
2. Select the Folder where the archived copy will be placed. (Click the browser button at the right end of the edit box to select the folder using a Folder browser dialog.)
3. Click the Perform Backup button to execute the backup. (If the database has undergone many additions and deletions over a lengthy period of time, use the Perform Backup and Compaction button instead. Clooz will remove unused space in the database and have it setup for optimal performance.)

Database Recovery

Database Recovery
This function restores a database file previously archived to the specified location.

Archive file to be restored:
 ...

Folder where restored database will be placed:
 ...

Open recovered database on completion of recovery.

T

o recover a database from a backup copy, go to the Home tab page, Tools screen, and click the Database Backup and Recovery button and follow these steps:

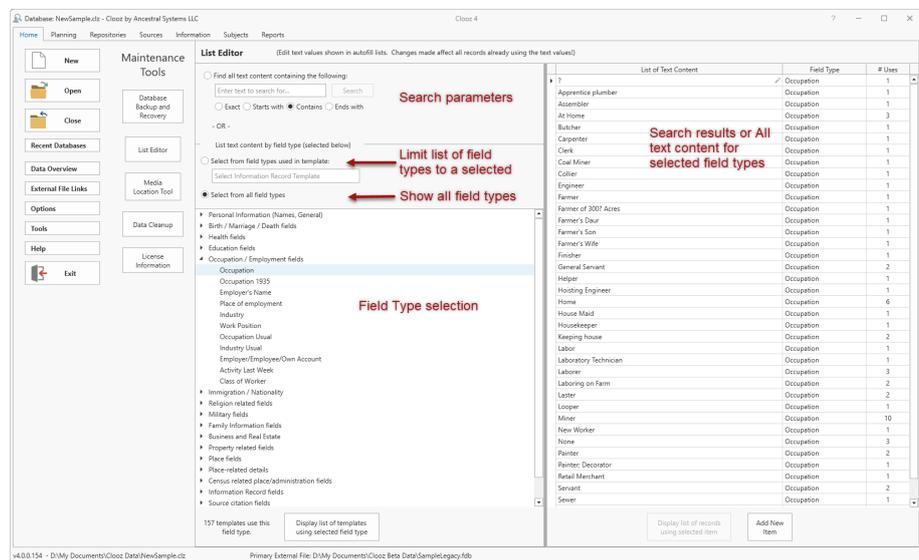
1. Select the database file to be restored. (Click the browser button at the right end of the edit box to select the file using a File selection dialog.)
2. Select the Folder where the restored copy will be placed. This is typically the folder in which you keep your working copies of Clooz databases. (Click the browser button at the right end of the edit box to select the folder using a Folder browser dialog.)
3. Click the Perform Recovery button to execute the recovery. The recovered database will be opened in Clooz if the check box is checked controlling that.

List Editor

Clooz uses an suggestion function for text fields through the Clooz program which are likely to have the same content used multiple times. An example of this would be occupation fields. Lists are generated for such fields based on all the different

values you have entered thus far in other occurrences of that type of field. As you enter text in the field, if the letters entered match an entry in the list, the rest of the word or name is filled out automatically. If you type further, the process continues and the filled out portion may change if a different match is now applicable. All of this is designed to save you keystrokes as you transcribe documents. However, sometimes you may enter the wrong characters, or decide a different form of the word is more appropriate. The trouble is the wrong form or spelling of the text keeps coming up when you are entering text in other similar type fields. This is when the List Editor becomes useful. You can change the text that appears in all the fields that had used the original text.

This editor is one of the Maintenance Tools on the Home tab page. Display the Maintenance Tools by clicking the Tools button, then switch to the List Editor by clicking the List Editor button on the tools screen.



On the left half of the List Editor two different ways are provided in which to locate the text you are looking to change:

- A search function for some text which could occur in any type of field, or
- Selection field type for which all text values are listed for you to choose from.

The right half of the List Editor is where the results of the search (if the search method was used) or all text content for the selected field type.

Searching all lists for text

To

Maintenance Tools

Database Backup and Recovery

List Editor (Edit text values shown in autofill lists. Change...)

Find all text content containing the following:

Search

Exact Starts with Contains Ends with

- OR -

se

arch for all occurrences of a certain text content, select the radio button for finding all text content, and enter the text you are looking for in the edit box. Select the desired search parameter for how the match is to be determined. These matches are not case-sensitive.

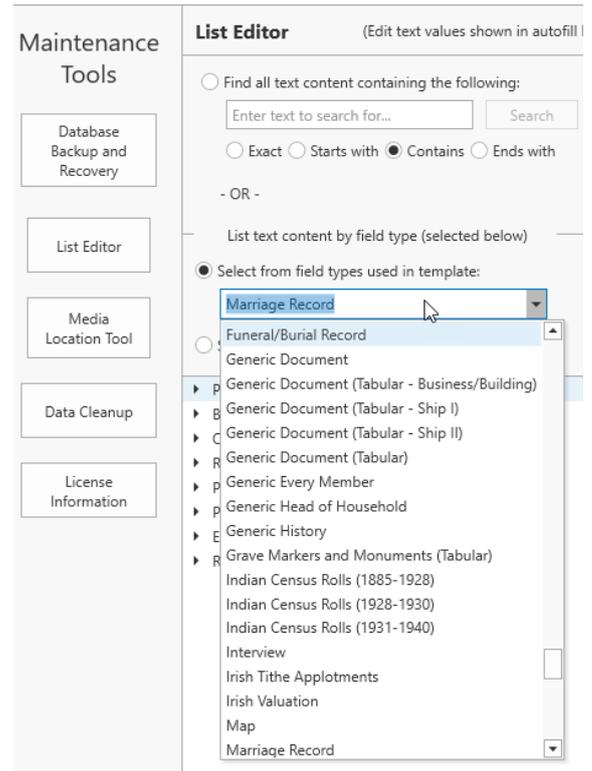
After entering the text and setting the search parameter, click the Search button to perform the search. View the results on the right side of the editor.

Listing all text content for a certain field type

To see the complete list of text content used in a certain field type, do the following:

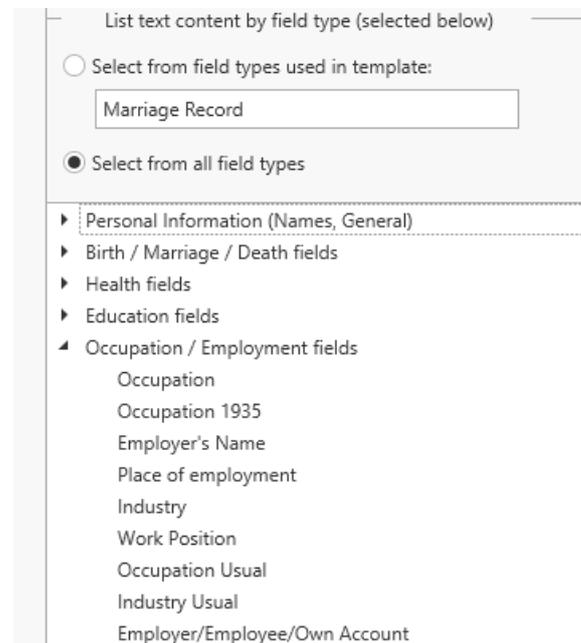
1. Select whether you want for choose from only those field types used in a template (Information Record) you select, or choose from all field types used in all of Clooz's Information Record templates.

2. If you choose the list of field types for a given template, click in the selection box and then click the down arrow to display the list of all Information Record templates. Select the template you are interested in.



3. Based on your prior selection, the list of field types will appear in the bottom portion for you to choose from.

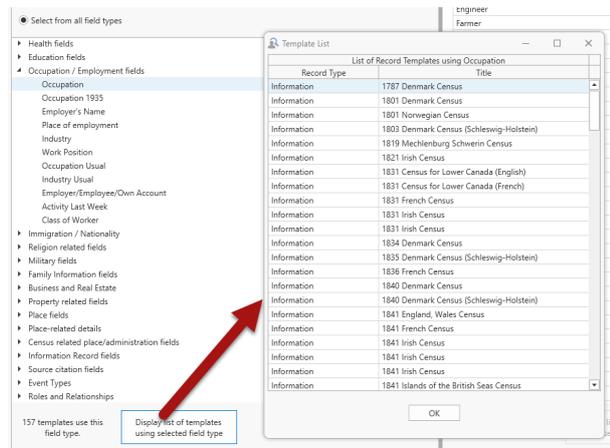
4. Once you select a field type, the list of all text used with that field type will appear on the right side of the editor.



Obtaining information about field types

You can see the number of templates which use the selected field type in the bottom panel of the field type list.

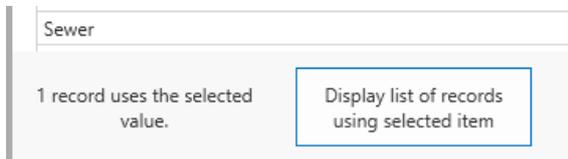
Click on the Display List of Templates button to see a list of those templates in a popup window.



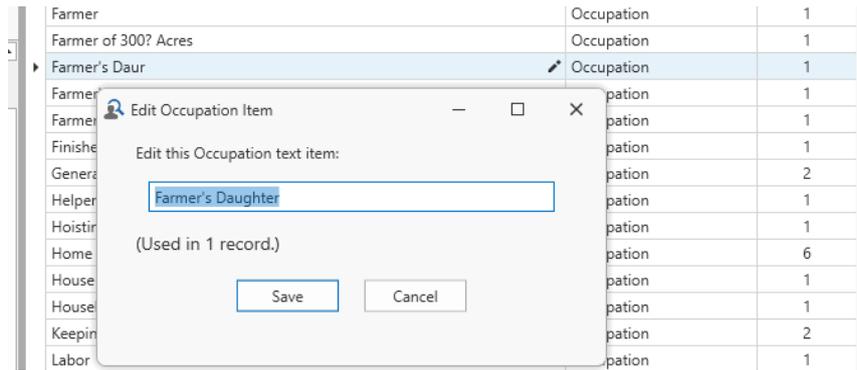
Editing the text content of a list item

To edit the text for a list item, click on that item in the List of Text Content (right side of List Editor), and do the following:

1. Ensure you are aware of all the places your change will be affecting. Changes made to text in this list will immediately affect all Information Records already using the text value. In the bottom panel, note the number of records using the selected value. To see a list of those records, click the button provided.



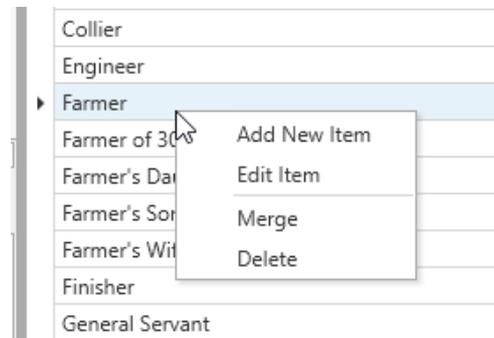
2. Once you are sure the change is appropriate, click on the edit button (pencil icon) on the row of the list you had selected.



3. Proceed to edit the text and then click Save (or cancel).

You can add a new text item to the list by clicking the Add New Item button at the bottom of the editor, or from the context menu by right clicking any of the list items.

The context menu also contains commands to merge two list entries (if there are duplicates), or delete an item. In the case of duplicate list items, use the merge function. Deleting a text item from the list will leave any fields which used that text blank.



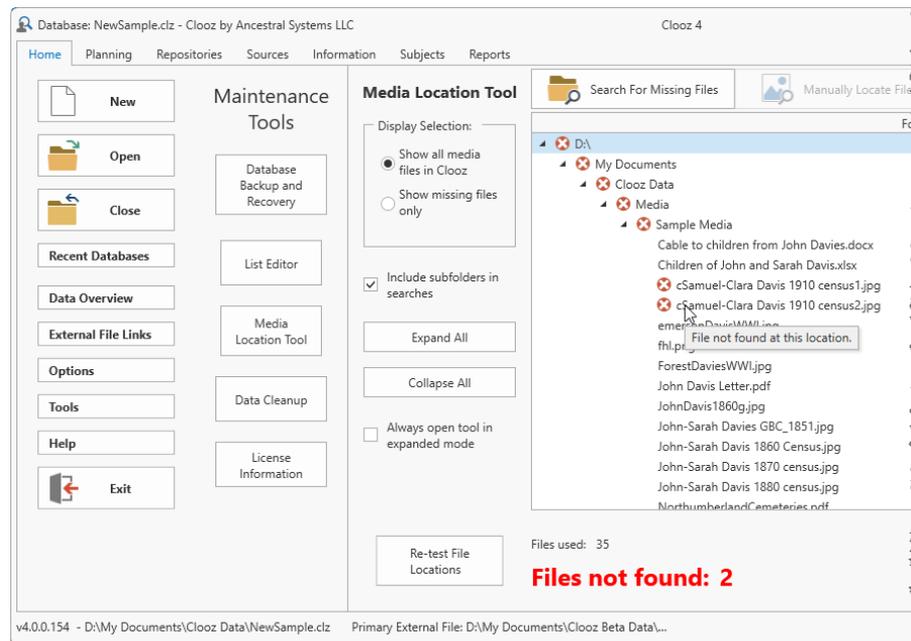
Media Location Tool

Media files you attach to records in Clooz are not copied or embedded in the Clooz database. Rather, Clooz tracks where the file is located on your computer. When moving your entire Clooz database and attached media files to a new computer or even just reorganizing files on your current computer, the links in the Clooz database pointing to file locations become invalid. That is, the link no longer points to the correct file location. The Media Location Tool (located in the Home tab page, Tools area) can be used to identify and fix broken file links.

Identifying Broken File Links

The Media

Location Tool shows 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. 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 information on what the media file is linked to.

The tool provides the option to show all media files in use, or show only missing files. Click the radio button for the display option you want.

Click the Expand All or Collapse All buttons to expand or collapse all of the folders listed. If you want to always open the tool in expanded mode, click the check box provided.



The list of files is generated the first time the tool is displayed. To update the list on subsequent uses of the tool, click the *Re-test File Locations* button at the bottom of the tool.

Fixing Broken File Links

There are several ways to fix broken file links:

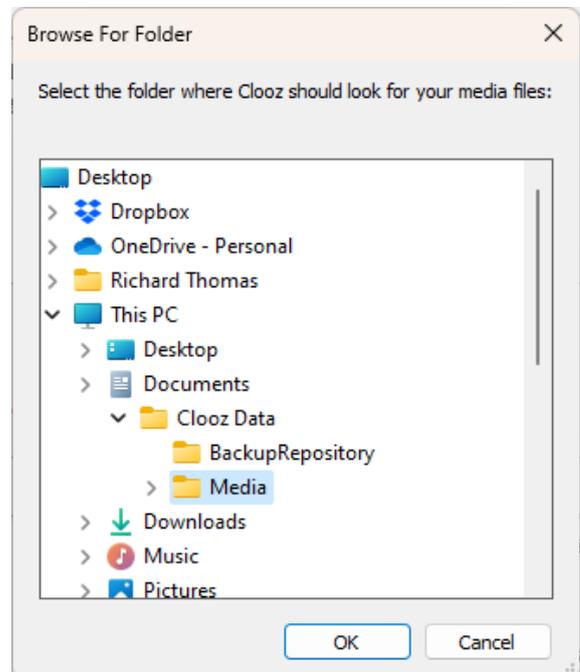
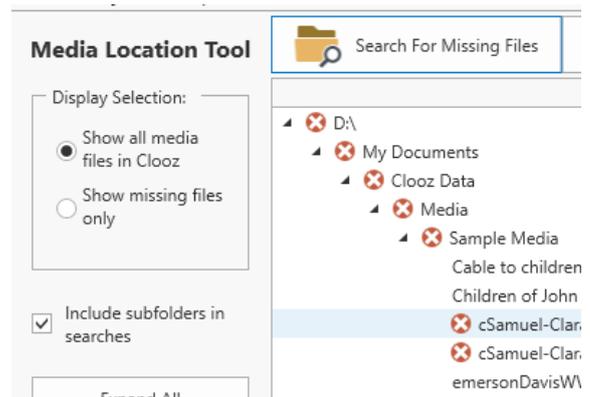
- Search for all missing files
- Manually locate a file



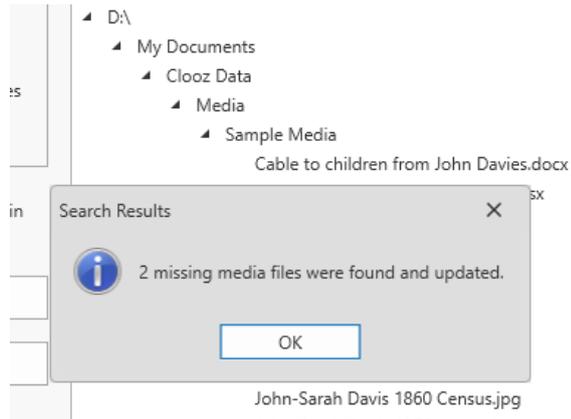
The search function finds files that have been moved. The manual method is required to locate files that have been renamed.

To search for missing files, do the following:

1. If you want the search to include all of the sub-folders contained within the folder you designate, check the check box provided. Otherwise, only the folder you designate will be searched.
2. Click on the Search For Missing Files button.
3. Select the folder to search from the folder browser window. If the *Include subfolders* check box was selected, the search will continue through all of its sub-folders.



4. Clooz performs the search, and display the results. The list is updated.



To perform a manual search, do the following:

- Select the missing file in the list.
- Click the *Manually Locate File* button, or select *Browse to File Location* from the context menu (right-click missing file in list).



- Locate the correct file in the file selection dialog and then click OK.

If you determine that the missing file is lost entirely, you can remove it from the database by selecting it in the list and click the *Remove Media* button (or similar command in the context menu)

Data Cleanup

There are several data cleanup functions you can use:

- Regenerate the Other Surnames value for all Subjects. This field is maintained by Clooz, based on all of the different surnames and spellings in the Information Record details (the actual surname found in the source document).
- Reformat event dates in the Subject records, and/or in Information Record events. This is useful if you change the date formatting options and want the new format rules to be applied to events.

To perform functions, check the boxes for the desired actions and then click the button to apply the actions.

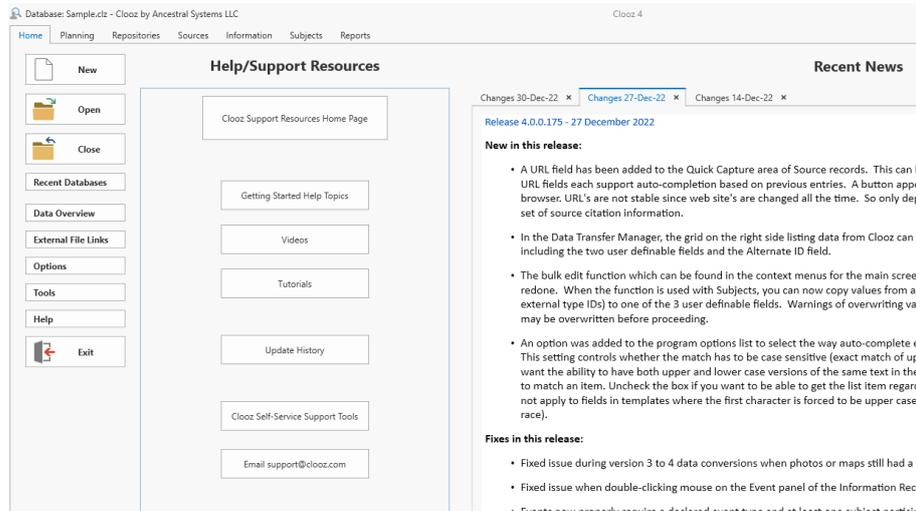
License Information

Use the License Information tool to obtain your current Clooz serial number and status.

To apply a new serial number (such as replacing a trial serial number with a purchased one), enter the number in the box and click Apply.

Help Resources

Links to this support web site are provided within the Clooz program. The Help button under the Home tab will display a screen with links to various support areas, as well as display of the latest news about Clooz for users to be aware of.



Index

B

Backup (database) 281

C

Cloning (duplicating) records 75

Composite View 54-55

Converting data records 79

Custom Options 264

Customizing column displays 68

D

Data Display 49

Data Exchange 157

- Connection with external files 161

- Data Transfer Manager 158, 168

- Direct export to Excel 257

- Exporting Data 157, 181, 186

- Import/Export Options 274

- Importing Data 157, 172

- Record Exporter 158, 186

- Synchronizing with external records 164

Data Organization 3

Database 39

Backup and Recovery 281

Creating/New 41

Moving to a new computer 47

Opening 21, 42

Upgrading 44

Deleting Records 73

Display Format

Composite View 54-55

Customizing Column Display 68

Grid Format 54

Grouping Records 67

Main Screen 22, 49

Main Data Area 53

Navigation Panel 23, 52

Status Bar 53

Tabs 50

Toolbar 53

Search and Filtering Records 62

Sorting Records 62

E

Editing Records 81

Adding new records 71

Bulk editing 77

Date editor 87

Deleting records 73

Editing existing records 72

Rating editor 86

Text editing 82

Events 6-7

Examples of using Clooz 14

Excel (exporting to) 257

F

Families 6-7

Filtering Records 62

G

Grid Style View 54

Grouping Records 67

H

Help resources (online) 294

I

Information Records 3-4

Cloning (duplicating) 75

Content Types 25

Converting record types 79

Editing 27, 109

Options 272-273

Media attachments 29, 89, 126

Merging records 73

Navigating the displays 60

Templates 24, 81

Favorites 61

Form Style 27

L

License Information 293

List Editor 284

M

Media Attachments 39, 89

Finding missing media files 289

Media Location Tool 289

Media Viewer 29, 91

Image Files 93

Pdf Files 102

Spreadsheet Files 107

Text Files 106

Merging Data Records 73

O

Options 264

P

- Program Options 264
 - Country name options 280
 - Date Processing Options 271
 - Display Options 268
 - Editor Options 273
 - General Options 265
 - Import/Export Options 274
 - Information Record Options 273
 - Media Files and Viewing Options 270
 - Personal File ID options 272
 - Shutdown Options 267
 - Source Options 273
 - Startup Options 266
 - Subject Data Updating Options 272
 - System Environment Options 268
 - Template Group Options 280
 - Toolbar Options 274
- Project 9, 148

R

- Rating Fields 86
 - Reports
 - Exporting direct to Excel 257
-

- Generation 197
 - Types 198
 - Viewing 208
- Repositories 8
 - Editing 137
 - Media attachments 89
- Research Objectives 9, 150
- Research Planning 147
 - Objectives 9, 150
 - Projects 9, 148
 - Tasks 10, 153
- Research Tasks 10, 153

S

- Searching Records 62
- Sorting Records 62
- Sources 7
 - Data Content 8
 - Editing 139
 - Media attachments 89
 - Merging source records 73
 - Types 8
- Subjects 4, 143
 - Artifacts 5, 144

Buildings/Real Estate 5, 144

Businesses 5, 144

Cloning (duplicating) 75

Data Content 5, 144

Editing 143

 Options 272

Merging 73

Merging subject records 73

People 5, 144

Ships 5, 144

Support 36

T

Terminology 11

Tips for using Clooz 33

Tools

 Data Cleanup tool 293

 Database Backup and Recovery 281

 License information 293

 List Editor 284

 Media location tool 289

 Program Options 264