MORE USEFUL FEATURES OF PAF 5 — ADVANCED SEARCH, CUSTOM REPORTS, AND GLOBAL SEARCH & REPLACE

ADVANCED SEARCH

PAF 5 has a powerful advanced search program that can find all the records in a database with any of a large number of characteristics. You could, for example, find all the people in your database that were born (or died) in a given place and/or during a given time period. You could find all those who have a certain phrase included in their individual notes, or all who are qualified for temple ordinances but do not yet have them. These and many other possibilities are available.

Suppose, for example, that you wish to find all the people in your database that were born in New Hampshire during the time period 1775-1800. You could do so through the following steps:

1. Bring up the "Find Individual" pop-up screen by clicking the binoculars icon on the toolbar. You will see a list of all the individuals in the database, which can be arranged either alphabetically or by RIN number.

2. Click on the "Advanced>>" button at the lower right. This adds a bottom section to the "Find Individual" screen, containing sections entitled "Relationship Filter", "Field Filter", and "Filtered List". (Note that you could have obtained this screen directly by clicking on the Search Menu at the top and choosing "Advanced Focus/Filter ...".)

3. In the "Field Filter" section at the bottom of the screen, click the "Define" button. A pop-up screen entitled "Field Filtering" appears. Choose the fields you want to include in your search, by highlighting them in the "Possible Fields:" column on the left and then clicking on the ">" button in the center column.

    For this example, click on "Birth Place" in the left hand column, and then on ">". In the pop-up screen, click on the box with an arrow-head that shows the word "Matches", and choose "Contains". Then type "*New Hampshire*" into the "Text:" field.

    Click the "AND" button in the middle column. Then click on "Birth Date" in the left hand column, and on ">". In the pop-up screen, choose the "Range" option and type "*1775*" in the "From:" box and "*1800*" in the "To:" box. (The "AND" button tells the computer to select only those records that fit both categories: born in NH <u>and</u> born between 1775 and 1800.) When you have finished with your selections, click "OK" at the bottom of the screen.

4. Returning to the "Find Individual" screen, notice that the number of matches is shown at the bottom of the "Field Filter" box. If you wish to see just the selected individuals in the alphabetical list, click the small "Show results only" box in the "Filtered List" section on the lower right. You can then examine each of the records by highlighting them in the list and viewing the details on the right. When you have finished, click "OK" at the bottom.

CUSTOM REPORTS

If one of the regular lists produced by PAF 5 doesn't produce the information you want, you can create a custom report to search out almost any information you wish and to display it in a form that will be most useful to you. You could, for example, print out a list of all the people in your database that were born (or died) in a given place and/or during a given time period, such as those found in the "Advanced Search" example above. You could list all those who have a certain phrase included in their individual notes. You could make a list of all who are qualified for temple ordinances but do not yet have them. These and many other types of custom lists can be

created by following the steps below.

To illustrate the method, we shall make a custom report showing the information that has just been found in the advanced search above.

1. Begin by clicking the printer button on the toolbar to bring up the "Reports and Charts" menu. Click on the "Custom" tab at the top, and you will see a menu to create a custom report. Type a title for the custom report in the "Title:" box. For this example, you might type "*Ancestors born in New Hampshire in 1775-1800*".

2. The next step, which is to select the records satisfying the specified criteria, has already been completed in your advanced search. (If it hadn't already been done, you would click the "Select" button in the "Select Filter/Focus" box right under the title. This would take you to the "Select Individuals" screen, which is the same as the "Find Individual" screen from which you can make an advanced search.) Notice that the individuals you found in your advanced search are still selected — the number of selected records shows in the "Select Filter/Focus" box, and if you wish you can re-examine the filtered list of selected individuals by clicking on the "Select" button.

3. You now need to specify the layout of the report. Begin by clicking the "Fields" button in the "Report Layout" section. Then choose the fields you want to appear in the printed report. For this example, you might first choose "Surname, Given" by clicking on it in the list and then on ">". Then choose "RIN", "Birth Date", and "Birth Place", and finish by clicking "OK". Now click on the "Sort Order" button in the main menu, and choose the fields "Surname, Given" and "Birth Date".

4. You can now examine the report by clicking the "Preview" button in the right hand column. If the report didn't turn out the way you wanted it, go back and modify your previous selections. If it looks good the way it is, go ahead and print it out.

GLOBAL SEARCH AND REPLACE

This feature, which is found in the PAF 5 Tools Menu, can be used to find and automatically replace any set of characters (numbers or letters) wherever it occurs in the entire database. It can be useful, for example, in replacing older temple codes by the newer ones, adding counties where they haven't been specified, replacing an abbreviation (such as "UT") by the full word ("Utah") wherever it occurs, and other such applications.

As an example, suppose your database contains several occurrences of the abbreviation "CA" for the state of California. You can replace each abbreviation by the state's full name as follows:

1. Click "Tools" on the menu bar at the top, and choose "Global Search and Replace ...". This brings up the "Global Search and Replace" pop-up screen.

2. Click on the first box, entitled "Search and replace text in:", and you will see all the various categories in which automatic replacements can be made. For this example, choose "Places". Then type "*CA*" in the "Search for:" box, and "*California*" in the "Replace with:" box. ***Be sure the "Case sensitive search" and "Create report of records changed" boxes are checkmarked.*** Then click on the "Replace" button at the bottom.

3. The computer will make the changes, and then produce a pop-up screen showing the results. Examine these to be sure the changes occurred the way you want them.

Caution: This can be a tricky operation, and you have to be careful to avoid creating errors. Always make a backup of your database before doing any global search and replace. Then, if you have made serious errors, you can restore your backup and try again.