

GenSmarts – the next version

TMG Users Group
September 20, 2007
presented by Nancy Archdekin

The company website at www.gensmarts.com/faq.html provides the following information about this program, which is now on version 2.1.1.10. I've added underlines to emphasize what I feel are key points.

- **What's unique about GenSmarts?**

GenSmarts is all about helping you uncover your family history (traditional genealogy software is focused on providing you tools to document what you discover). When you use GenSmarts, you do very little typing - you're reviewing GenSmarts suggestions and a simple mouse click will engage GenSmarts to perform lookups for you and present results. GenSmarts doesn't replace your traditional genealogy software (e.g. PAF, Family Tree Maker, etc.), but works alongside it by reading and analyzing the data you've already collected.

- **What does GenSmarts do?**

GenSmarts develops a profile of your ancestors based on where and when they lived. This profile is then matched with GenSmarts inventory of known records to make predictions about the record trail your ancestors may have left behind. These predictions are then prioritized to highlight data that you're missing. The logic behind each suggestion is fully explained. For suggestions that can be researched online, at your direction, GenSmarts will navigate your internet browser for you, typing in your ancestors name and even pressing the SEARCH button for you!

- **What countries does GenSmarts support?**

GenSmarts comes with a known records inventory that supports research for the USA, Canada, and the UK. There is also a little content for Australia. You can add your own known records inventory definitions for any country.

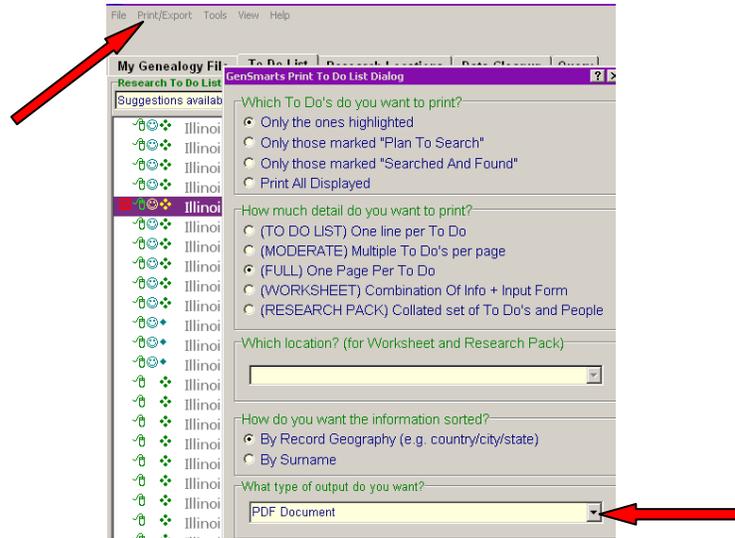
The release statement from May 2007 says that “Version 2 features a new user interface, more powerful and as well as easier to use suggestion filters, new source auditing and analysis capabilities, new reports and output options, as well as several other enhancements. An overview of the new features can be found at <http://www.GenSmarts.com/V2Tour.html>.”

Some of the *existing and future planned* features described on the Tour include the following bulleted items (in brown print). I've added notes and screenshots to provide further explanations.

- Would you prefer to generate a word document or a PDF file instead of printing on paper? Now you can! All reports now support these “save as file” options.
- Do you ever wish you could get a copy of some of GenSmarts data into an Excel spreadsheet? Are you a power user who likes to create you own custom reports? Version 2 lets you export any of the data that sits behind the GenSmarts reports into Excel or MS Access format.

If you click on Print/Export (shown on the snapshot on the next page), then To Do List, you'll find several options with a drop-down list at the bottom of the screen. Among the items on the drop-down list are MS Word (as RTF), PDF, Excel and Access. For fun, I created an excel file which was a bit messy, but with some work

on the options and appropriate naming of the file, I could see where it might be useful as a tool for research trips.



- Wish GenSmarts would point out when a suggestion is for a source you don't have or perhaps not even make a suggestion for something you do have? GenSmarts Version 2 reads your citations and sources data and attempts to do just that. At Version 2 launch, we've included some basic rules for interpreting sources, but also have a tool in the works that will allow you to add your own rules (or fine tune ours to better fit your citation style).

Now you can define your own rules and have GenSmarts analyze for any record you want... and create your own custom actions to be taken on the results!

We call this tool the "sandbox" because it lets you play with different types of rules and actions until you get the results you want, without affecting the normal GenSmarts analysis.

We've set up a "home page" for news, training and tips related to this enhancement - see the button at the bottom of the page. Check it periodically for new content.

Lastly... this is an advanced function. It isn't something you need to understand or take advantage of to use GenSmarts. For those users that understand abstraction, it allows the definition of abstract rules for customized research analysis. Take a look at the training materials and look at the examples we've provided... if you still don't understand, that's ok - you won't be able to use this function, but you will be able to find and use the definitions created by others.

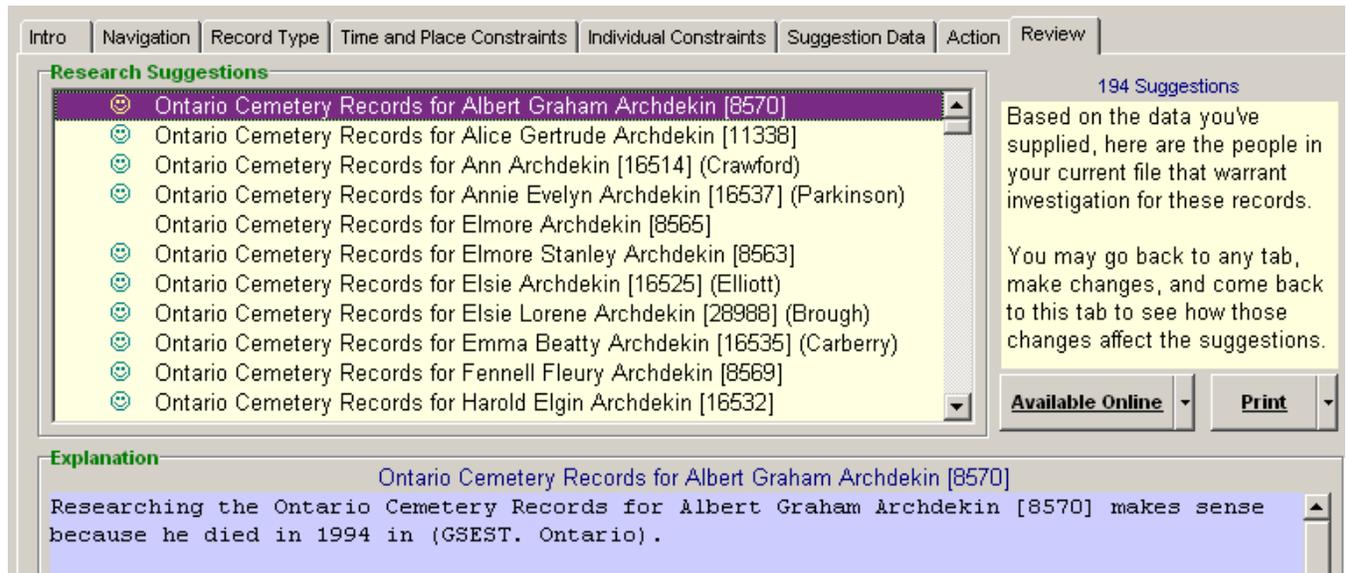
This is phase one of this enhancement. In phase two, we'll add the remaining tools that let you blend this custom analysis in with the regular GenSmarts analysis, enabling you to print, mark them Found, Not Found, etc. In phase three, we'll add some more tools that make it easy to find and use custom analysis created by others, and vice versa.

To try out the Sandbox, press the NEXT button...

[News, tips, and training =>](#) <http://www.GenSmarts.com/customAnalysis.asp>

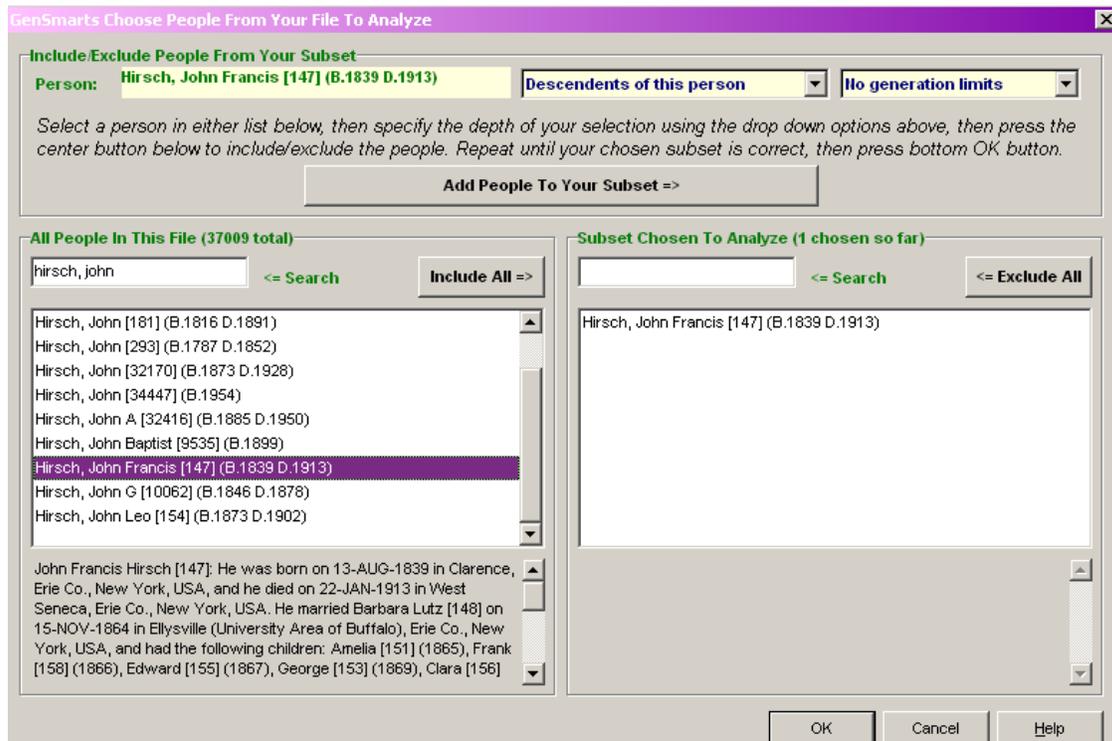
This is definitely an **advanced feature**, but seems to have a lot of potential. The program walks you through a set of screens (descriptions are shown on the tabs in the next screenshot) where you fill in the criteria. You can also choose what you want to search for after the program identifies the set of records which meet the criteria. Here it shows an "Available Online" button, but this

can be narrowed down to search a specific database, if you desire. This is definitely something to play with AFTER viewing the Training Video (15 minutes) accessible via the link in the Intro (above).

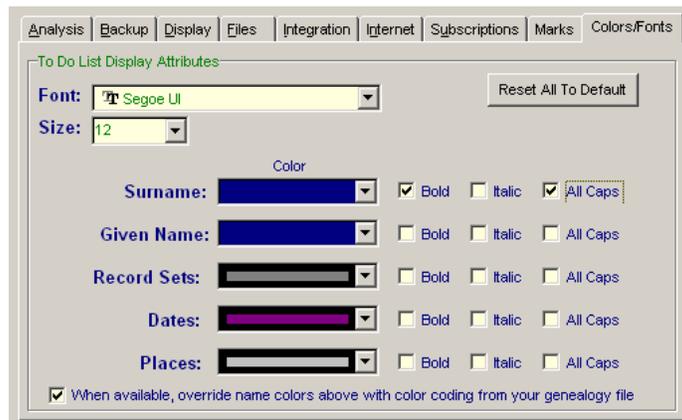


- Wish GenSmarts would only give you suggestions for a part of your file, rather than the whole thing? Version 2 can do that. You can specify what people or lines you want suggestions for. This reduces the load time for larger files as well as the number of suggestions you have to deal with. You'll find the tool to create these specifications off the top line menu – TOOLS... ANALYZE ONLY PART OF A FILE...

This feature is SO COOL!

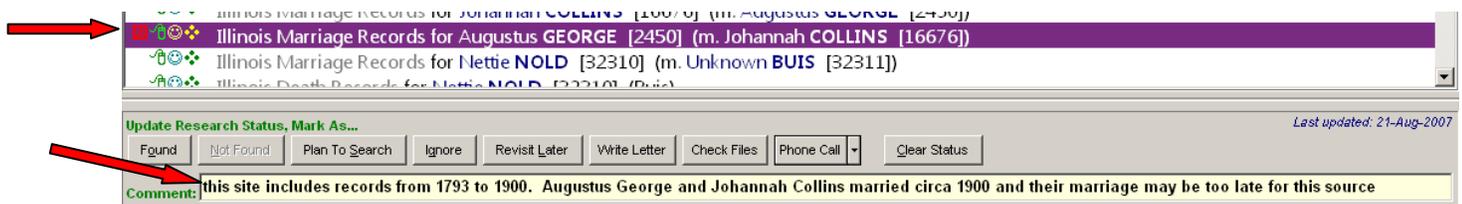


- Do you find it easier to read genealogy data when surnames are bolded or in all caps? Like to see place names in italics? Want your dates underlined? Knock yourself out with Version 2! That new COLORS/FONTS tab in the TOOLS...SETTINGS



- Want to attach a comment to a to do list suggestion? You'll find a new place to do just that – it sits between the To Do list and the Explanation text. It's simple to use – when you're looking at a suggestion, you simply type anything you want in the comment field. It's automatically saved and will reappear whenever you look at that suggestion again.

I did not find the marriage record for Augustus & Johanna, so I marked the suggestion as “not found” (the red box) and added a comment as to why it was probably not there.



- The default view (as in TOOLS...VIEW...) in Version 2 features a simple drop down box immediately above the To Do list where you'll find several wizards/templates to guide you through the popular ways users like to filter – show me suggestions for a specific person, library, etc. Filters you've used recently are also kept in the list so they can be easily reapplied. To further simplify the default view, the sort checkboxes have also been replaced with a drop down list (featuring a new Sort By Record Type). And you may notice that the <= SEARCH input box is gone completely. Not to worry – use the top line menu TOOLS...VIEW... and switch to the ADVANCED view to get your <=SEARCH input box back. We expect most existing users will want to use this ADVANCED view, but we think it's a bit much for new users, based on the feedback we got from Version 1.

Using the Advanced view, I limited my To Do List to Suggestions at the IL State Archives. I then clicked on the Available Online box at the bottom right and up came 3 marriage records for Augustus George. Unfortunately, none of them

matched, but the search was quick and took me directly to the results list from the IL State Archives website without having to type anything.

The screenshot shows the GenSmarts software interface with a list of search suggestions. A red arrow points to the 'Research To Do List' tab. The suggestions list includes records for Barbara BENGESSAR, Fredrick George BENGESSAR, Francis Thomas BENGESSAR, Johannah COLLINS, Augustus GEORGE, Nettie NOLD, Flora NOLD, Albert ROBERTS, and James Herbert YOUNG. The record for Augustus GEORGE is highlighted. An inset browser window shows the 'Illinois Statewide Marriage Index, 1763-1900' with a table of records. A red arrow points to the 'Available Online!' button in the bottom right corner of the software interface.

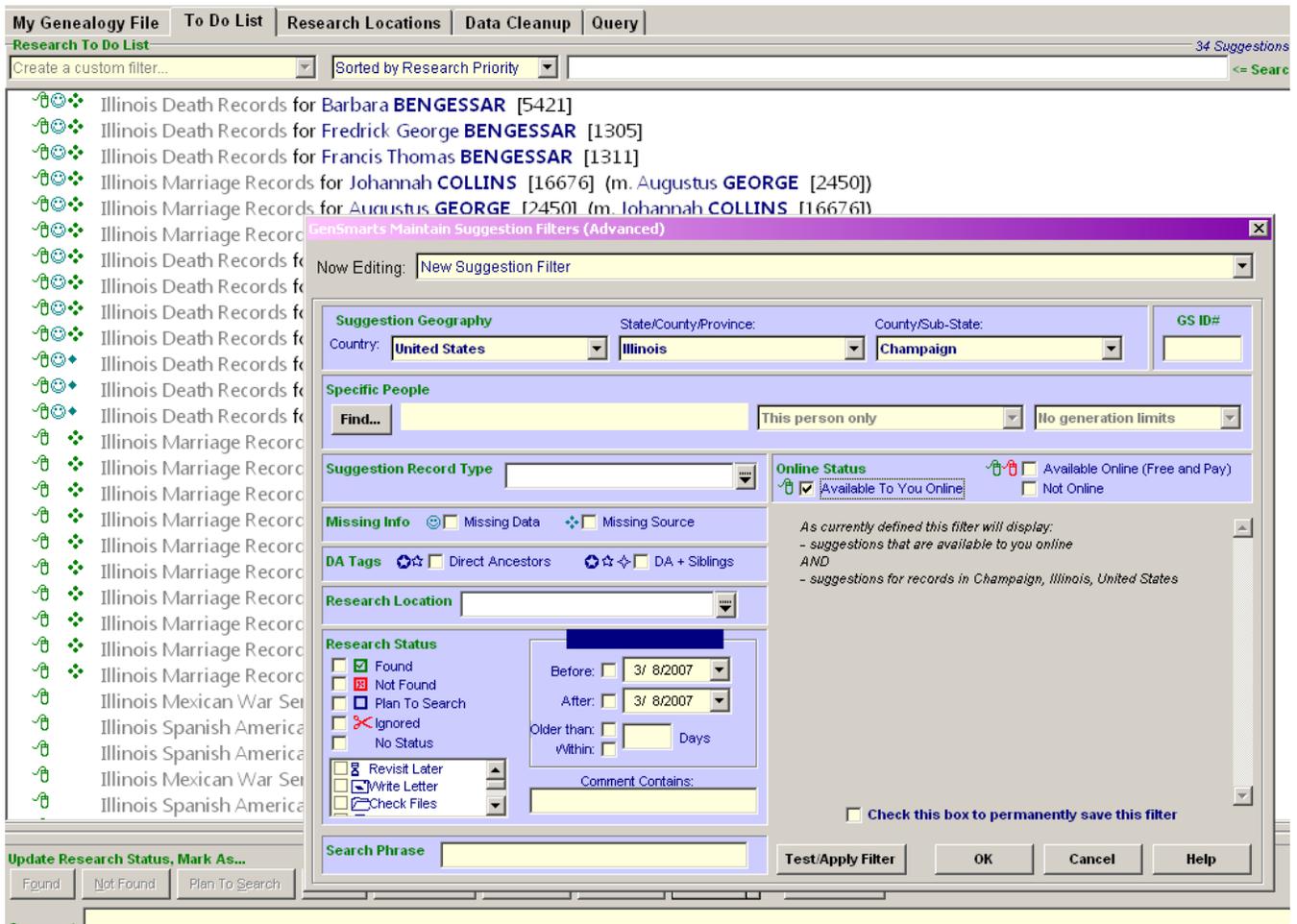
Groom	Bride	Date	Vol./Page	License No.	County
GEORGE, AUGUSTUS	HEFFNER, SARAH A	06/06/1878	00C/0284		GALLATIN
GEORGE, AUGUSTUS	INMAN, ELIZABETH	12/20/1877	00C/0250		GALLATIN
GEORGE, AUGUSTUS	MEARS, ALICE A	11/23/1889	016/		WHITE

- When you run GenSmarts, do you wish it would pick up where you left off from your last run – same filtering, same search criteria, same window size, and looking at the same suggestion? Version 2 now has “sticky” filtering that doesn’t get reset when you close GenSmarts. It also notes a “bookmark” on the suggestion you were looking at and repositions to that point on your next run.

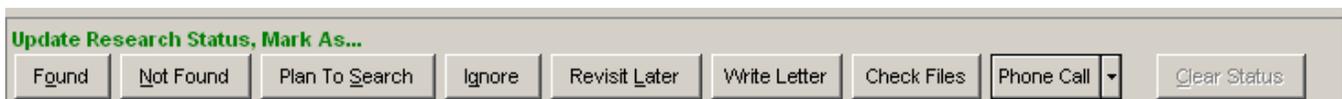
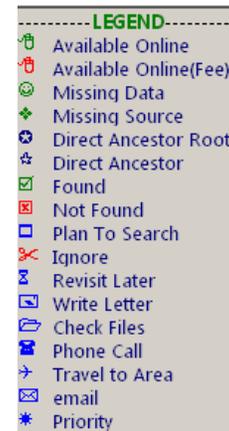
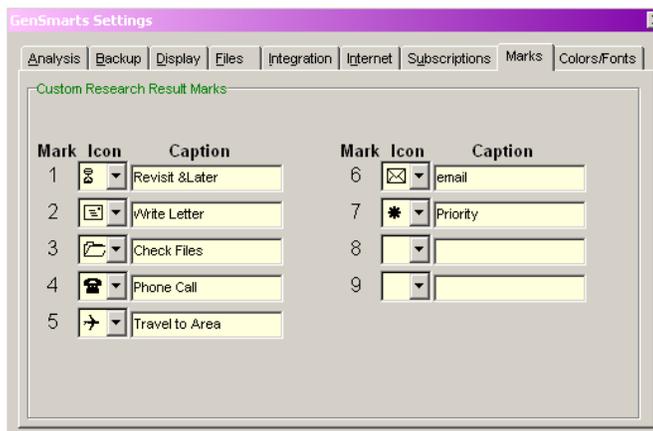
I have to say I’m a bit confused here. The settings section allows you to choose to “open the last file used” when you start the program. But other than that, I don’t find any “sticky” filtering or “bookmark” options. However, when I closed the program and reopened it, I was back on the same screen with the same set of search results and the same record highlighted, so I guess that is all this *option* is referring to.

- Do you find yourself wanting more filtering options? In the new filtering drop down list mentioned above, you’ll find an ADVANCED filtering option that has a whole page of options and selections that let you build much more complex filters if you’re up to it. It’s also the home base for editing and saving any filters you’ve created or used recently.

All I can say is WOW – there are lots of drop-down options on this screen!



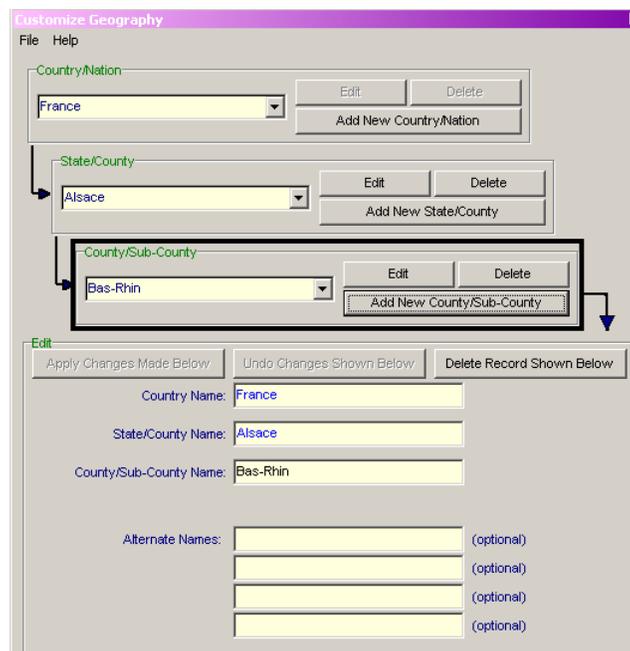
- Ever have situations where you just don't think GenSmarts basic research status marks (Found, Not Found, Plan to Search, etc.) fit the bill? Version 2 lets you add up to 9 additional marks of your own design. Make up your own mark name and pick an icon for it – it will show up as a button right along side GenSmarts basic marks...



One complaint – there's lots of room on the end of this section to place buttons for all 9 icons, but the last 5 end up as a drop-down list rather than being spread out.

- Every wonder why GenSmarts is off on a birth place location estimate when the location for an infant baptism is known? It's because Version 1 only imported Births, Marriage, Death, and Census events/facts/tags. No sources imported, no citations imported, no baptism events, no resided events, etc. Were you someone who documented your census finds as sources rather than proper events? GenSmarts won't see them. Version 2 changes all that by importing many more events/facts/tags, as well as having the capability of "asserting" events from your sources (such as a census event meaning that you found that person on a census). As with any artificial intelligence application, the more facts you give it, the smarter it gets – so the result is better suggestions.

Going back to the quotes on the opening page of this report which say that You can add your own known records inventory definitions for any country – this feature is found in the Customize Geography screen



I didn't immediately see a use for this feature, but then I played with the data cleanup screen and was working with place names. GenSmarts pointed out that Apple Valley was NOT in San Bernadino County as I had entered it and made some suggestions for correcting this record. Sure enough, checking GNIS shows that this town is in fact in San Bernardino County.

My Genealogy File | To Do List | Research Locations | Data Cleanup | Query

<= Find Next

Help On Place Name Data Cleanup

From Your File...	GenSmarts Interpretation
B) Alleghany, New York, USA	LOCL: Alleghany DIV2: DIV1: NY COUNTRY: USA
B) Alleghany, New York, USA	LOCL: Alleghany DIV2: DIV1: NY COUNTRY: USA
B) Tomah, Unk Co, Wisconsin, USA	LOCL: Tomah, Unk Co DIV2: DIV1: WI COUNTRY: USA
B) Colma, California, USA	LOCL: Colma DIV2: DIV1: CA COUNTRY: USA
B) Petersburg, Colorado, USA	LOCL: Petersburg DIV2: DIV1: CO COUNTRY: USA
B) Charleston, Unk Co, Oklahoma, USA	LOCL: Charleston, Unk Co DIV2: DIV1: OK COUNTRY: USA
B) Mt. Dora, Florida, USA	LOCL: Mt. Dora DIV2: DIV1: FL COUNTRY: USA
B) Pompeii, Lancaster Co., New York, USA	LOCL: Pompeii, Lancaster Co DIV2: DIV1: NY COUNTRY: USA
B) Madison Co., Wisconsin, USA	LOCL: Madison Co DIV2: DIV1: WI COUNTRY: USA
B) Allentown, Unk Co, Wisconsin, USA	LOCL: Allentown, Unk Co DIV2: DIV1: WI COUNTRY: USA
B) Apple Valley, San Bernardino Co., California, USA	LOCL: Apple Valley, San Bernardino Co DIV2: DIV1: CA COUNTRY: USA
B) Johnsbury, Unk Co, Wisconsin, USA	LOCL: Johnsbury, Unk Co DIV2: DIV1: WI COUNTRY: USA

Explanation

Apple Valley, San Bernardino Co., California, USA

The place name in question, "Apple Valley, San Bernardino Co., California, USA", comes from the birth event for Junk, Kristy [6809] (B.1970). The place name used by GenSmarts for this session will be "California".

This place name doesn't appear to specify a valid current country. If you haven't specified a county consider doing so to get the most out of GenSmarts.

If you have specified a county, double check the spelling.. "San Bernadino" from your file, if that was what you intended as a county, has a somewhat similar spelling to the following current counties in California: San Benito, San Bernardino, San Francisco, and Santa Barbara

Here's some known cities with similar names:

- San Benito, San Benito, CA, USA
- San Bernardino, San Bernardino, CA, USA

If it's a historical county that no longer exists, it's probable that we simply don't have it in our database yet. If you right click on the item, you may see an option to directly add it to your custom places - if we can manage a guess at the county name... If you don't see the option, you can always use the TOOLS...CUSTOMIZE GEOGRAPHY... to add to the places that GenSmarts validates against. Any changes you make to the geography won't be picked up until the next time you refresh/reload.

But, note the explanation which says that if the place is a historical town (as is my ancestors' town of Ellysville in Erie County NY) then I could use the customize geography screen to add the new place name.

Like TMG, you can use GenSmarts straight out of the box, or now you can customize it to suit your own needs – as much or as little as you want.

I found the new version to contain a lot of exciting enhancements as well as improvements in its ability to analyze data in genealogy files.

It should also be noted that the GenSmarts community has both a user's forum and an e-mail list, which are accessible through the company's website. Both can be helpful if you run into problems or want more information on the features available in the program. The author of the program, Aaron Underwood, is also very responsive to user questions and problems.

Now if I could just get caught up on entry, maybe I could make use of this wonderful tool 😊